

Market and Trade Profile: South Korea

South Korea





Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about South Korean travellers and who they are. It takes a look at Britain and its competitive set as well as activities of South Korean visitors in the UK.
- **Chapter 2: Understanding the market** takes a close look at South Korean consumer trends, booking, planning and further travel behaviour of this source market. Perceptions of Britain held by the South Koreans are also highlighted.
- **Chapter 3: Access and travel trade** shows how the South Koreans travel to the UK, how to best cater for their needs and wants during their stay and gives insights into the South Korean travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out.



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Chapter 1: Inbound market statistics





Chapter 1: Inbound market statistics

Chapter summary

- In 2016, South Korea rose one place in the world tourism expenditure rankings to become the 8th most valuable outbound market, spending US\$27.2 billion abroad.
- The outbound South Korean market in volume fell after the global financial crisis in 2008 and 2009. However, it has since recovered and South Koreans made 64% more overnight visits in 2016 than they did in 2007.
- The UK was their 5th most visited destination in Western Europe in 2016.
- South Korea was the UK's 32nd largest source market by volume and 35th most valuable for visitor spending in 2016. Average spend per visit from South Korea was 27% higher than the global average for all visits to the UK in 2016.
- Summer is the most popular season for South Koreans to the UK with 38% of visits from this market happening in Q3 (July-September).
- 3-in-4 departing holiday visitors from South Korea in 2015 were 'extremely likely' to recommend the UK for a holiday or a short break, more than the all-market average.

Source: UNWTO, Oxford Economics, International Passenger Survey by ONS





Chapter 1.1: Key statistics

Key insights

- In 2016 there were 198,000 visits from South Korea to the UK with visitors spending £151 million.
- 2014 and 2015 were record years for the South Korean inbound market to the UK, in terms of inbound spend and volume of visits respectively. Visits fell 12% in 2016, although South Korean visitors spent 8% more in 2016 than in 2015.
- Overall, the long-term trend remains positive: there were 41% more visits from South Korea to the UK in 2016 vs. 2011, with a 18% increase in inbound spend in the same time frame.
- Most visits from South Korea to the UK are made for holidays, almost twice as many as the all-market average (73% of all South Korea visits, vs. 38% of all inbound visits to the UK, when looking at visits from 2014-2016). Holiday visits account for most of the increase.
- London is by far the leading destination: South Koreans usually spend 3-in-5 of their nights in the UK in London.

**About
3-in-4**
visits to the UK
from South Korea
were for holiday
(2014-2016)

Source: International Passenger Survey by ONS, Oxford Economics



1.1 Key statistics: global context and 10 year trend

Global context

Measure	2016
International tourism expenditure (US\$bn)	27.2
Global rank for international tourism expenditure	8
Number of outbound overnight visits (m)	25.2
Most visited destination overall	Japan
Most visited destination in Europe	Czech Republic
Most visited destination in Western Europe	France

Inbound travel to Britain overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10 year trend			
2007	157	1,547	90
2008	128	1,378	81
2009	75	1,029	70
2010	115	1,853	86
2011	141	1,262	128
2012	158	1,302	103
2013	202	1,737	189
2014	202	1,715	199
2015	224	1,544	139
2016	198	1,653	151
Share of UK total in 2016	0.5%	0.6%	0.7%

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics



1.1 Key statistics – volume and value

Inbound volume and value

Measure	2016	Change vs. 2015	Rank out of UK top markets
Visits (000s)	198	-12%	32
Nights (000s)	1,653	+7%	36
Spend (£m)	151	+8%	35

Nights per visit, spend

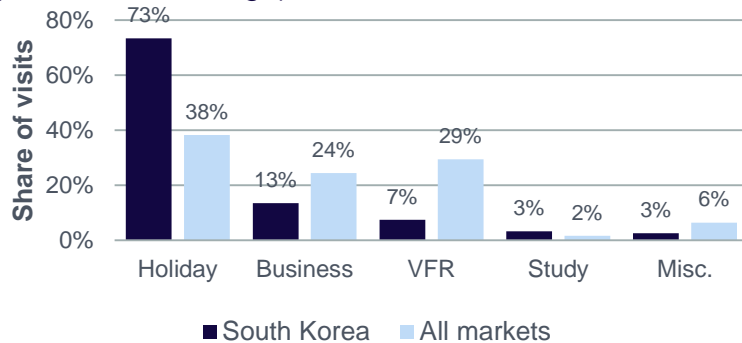
Averages by journey purpose in 2014-2016	Nights per visit	Spend per night	Spend per visit
Holiday	4	£121	£540
Business	7	£171	£1,228
Visiting Friends/ Relatives	14	£44	£600
All visits	8	£99	£783

Source: International Passenger Survey by ONS

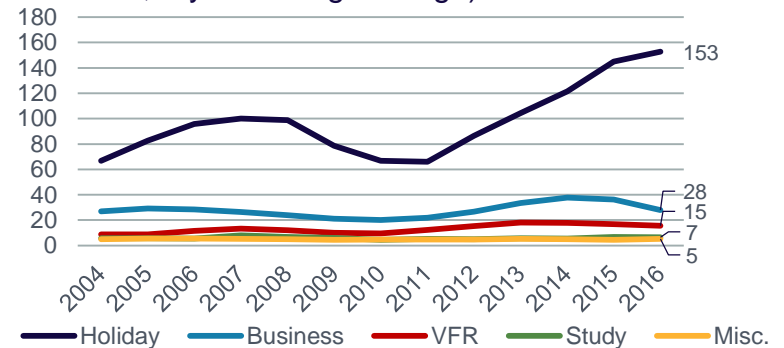


1.1 Key statistics: journey purpose

Journey purpose (2014-2016 average)



Journey purpose trend (visits 000s, 3-year rolling average)



- Most visits from South Korea to the UK are made for leisure: 73% of visits were for a holiday in 2014-2016, and 7% to visit friends or relatives. Business is the second most common reason for which South Koreans visit the UK, comprising 13% of all visits.
- South Korean visitors are much more likely to be holiday visitors than the global average (38%).
- Fewer visits were made for study (3%), or miscellaneous purposes (3%) in 2014-2016.
- Most South Korean visitors to the UK are first-time visitors: 21% of staying holiday visits made by South Korean residents to the UK are made by repeat visitors, only a third of the all-market average (63%).

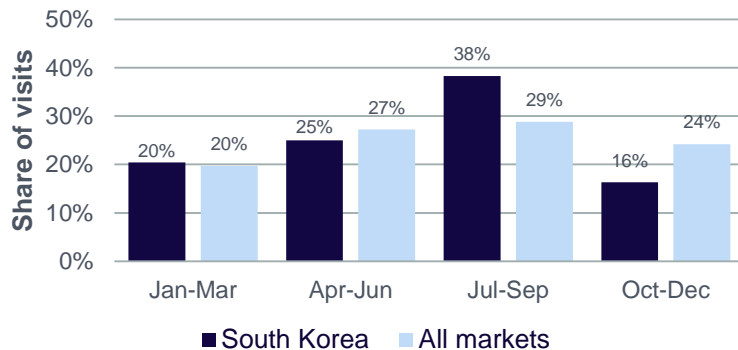
- Holiday visits have dominated visits from South Korea to the UK for many years. There was a fall in 2008-2011, after the economic crisis, but holiday visits have bounced back since, and there are 1.5 times as many holiday visits in 2014-2016 on average as in 2008.
- Holiday visitors also account for just over half the inbound spending from South Korea in the UK in 2014-2016 (51%), followed by business visits (21%) and studying visits (21%).
- In terms of nights, holiday visits also topped the table for nights spent by South Korean visitors in the UK (41%), followed by study visits (32%), VFR (13%), and business (12%) on average in 2014-2016.

Source: International Passenger Survey by ONS; repeat / first time visitors question asked in 2015 and excludes UK nationals



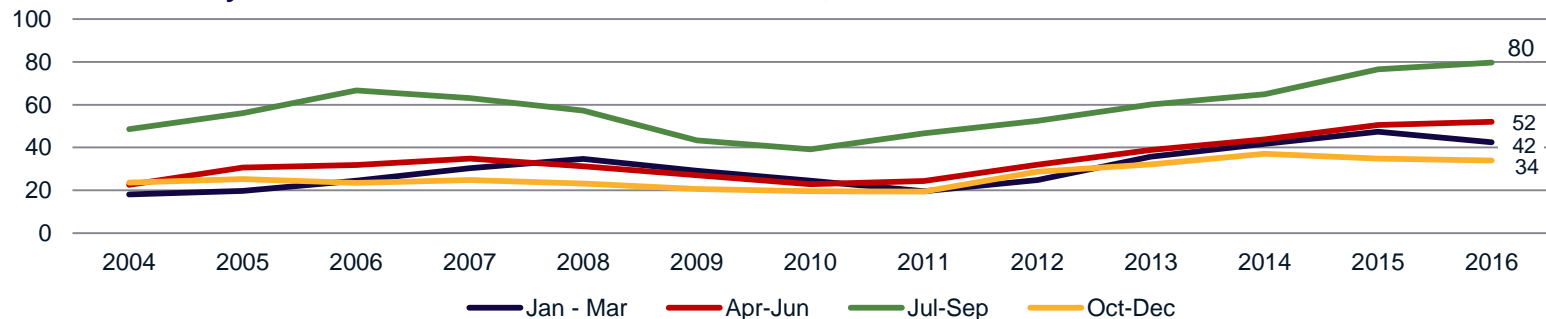
1.1 Key statistics: seasonality

Seasonality (2014-2016 average)



- South Korean visitors tend to come to the UK in the summer months: on average in 2014-2016, 38% of all visits from South Korea to the UK were made between July and September, which over indexes on the global average (29%).
- 1-in-4 visits were made in April-June, followed by January-March (1-in-5 visits), and October-December (almost 1-in-6 visits).
- The first and last quarters of the year have grown slower than the other two quarters in recent years.

Seasonality trend (visits 000s, 3-year rolling average)

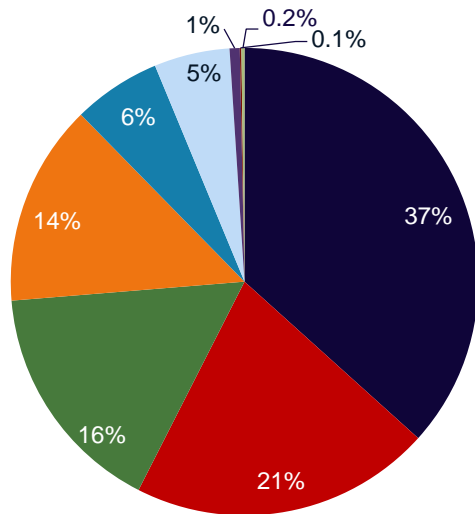


Source: International Passenger Survey by ONS



1.1 Key statistics: length of stay and accommodation

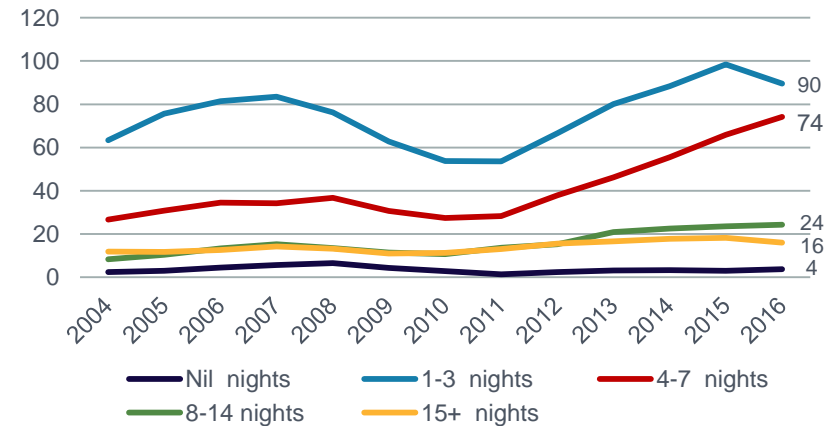
Accommodation stayed in, 2014-2016
(nights, %share)



- Hotel/guest house
- Hostel/university/school
- Free guest with relatives or friends
- Rented house/flat
- Bed & Breakfast
- Paying guest family or friends house
- Own home
- Holiday village/Centre
- Other

Source: International Passenger Survey by ONS

Duration of stay trend
(visits 000s, 3-year rolling average)



- Most South Korean visitors stay in the UK for less than a week, with short stays of 1-3 nights being most popular (often as part of a multi-country trip). However, 4-7 night stays have been growing at a steady pace.
- On average in 2014-2016, South Korean visitors spent over a third of their nights in the UK at hotels or guest houses, an additional 1-in-5 nights spent in a hostel, university or school, about 1-in-6 as a free guest with relatives or friends, and 1-in-7 in a rented house or flat (37%, 21%, 16% and 14% respectively).

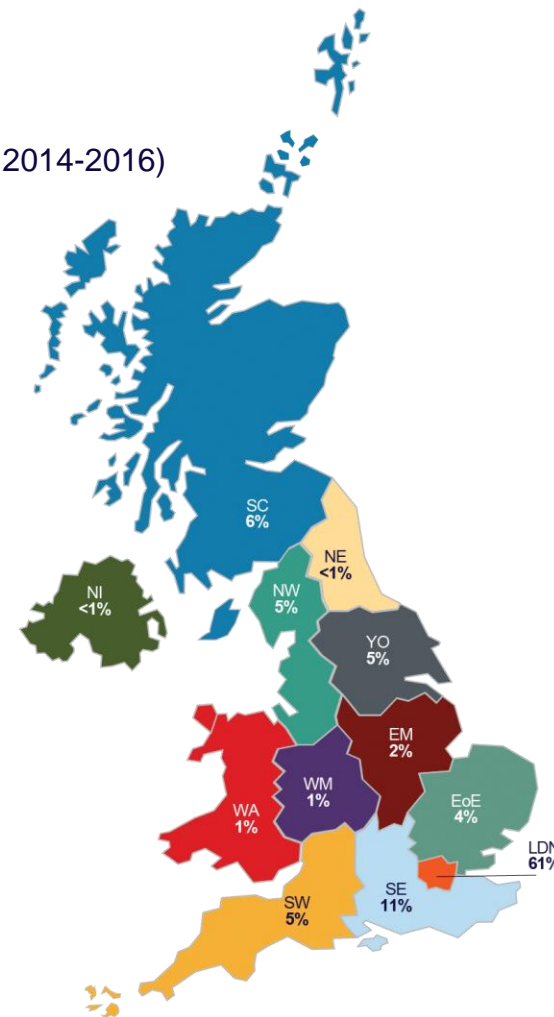


1.1 Key statistics: regional spread

Visits to the UK (2014-2016 yearly average)

Region	Nights stayed (000)	Visits (000)
Total	1,638	208
Scotland (SC)	97	10
Wales (WA)	17	4
Northern Ireland (NI)	1	<1
London (LDN)	991	169
North East (NE)	<1	<1
North West (NW)	75	7
Yorkshire (YO)	82	4
West Midlands (WM)	14	5
East Midlands (EM)	33	2
East of England (EoE)	59	3
South West (SW)	88	8
South East (SE)	176	17
Nil nights (Nil)	N/A	4

Nights (% share, 2014-2016)



Source: International Passenger Survey by ONS. Visits data for nations and regions includes overnight stays, not day trips.

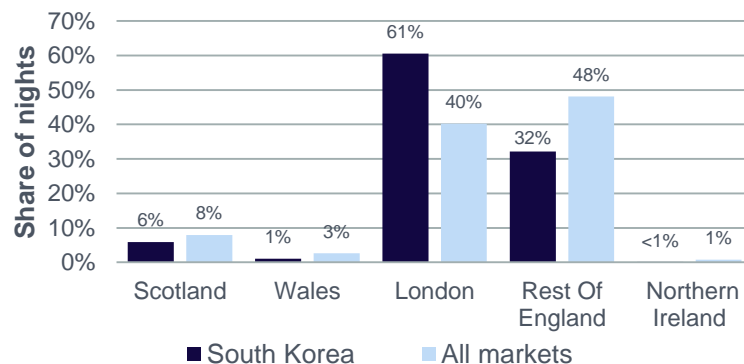


1.1 Key statistics: regional spread and top towns and cities

Top towns and cities visited (2012-2016)

Town	Average yearly overnight visits (000s)
London	158
Edinburgh	7
Oxford	5
Manchester	4

Regional spread (2014-2016)



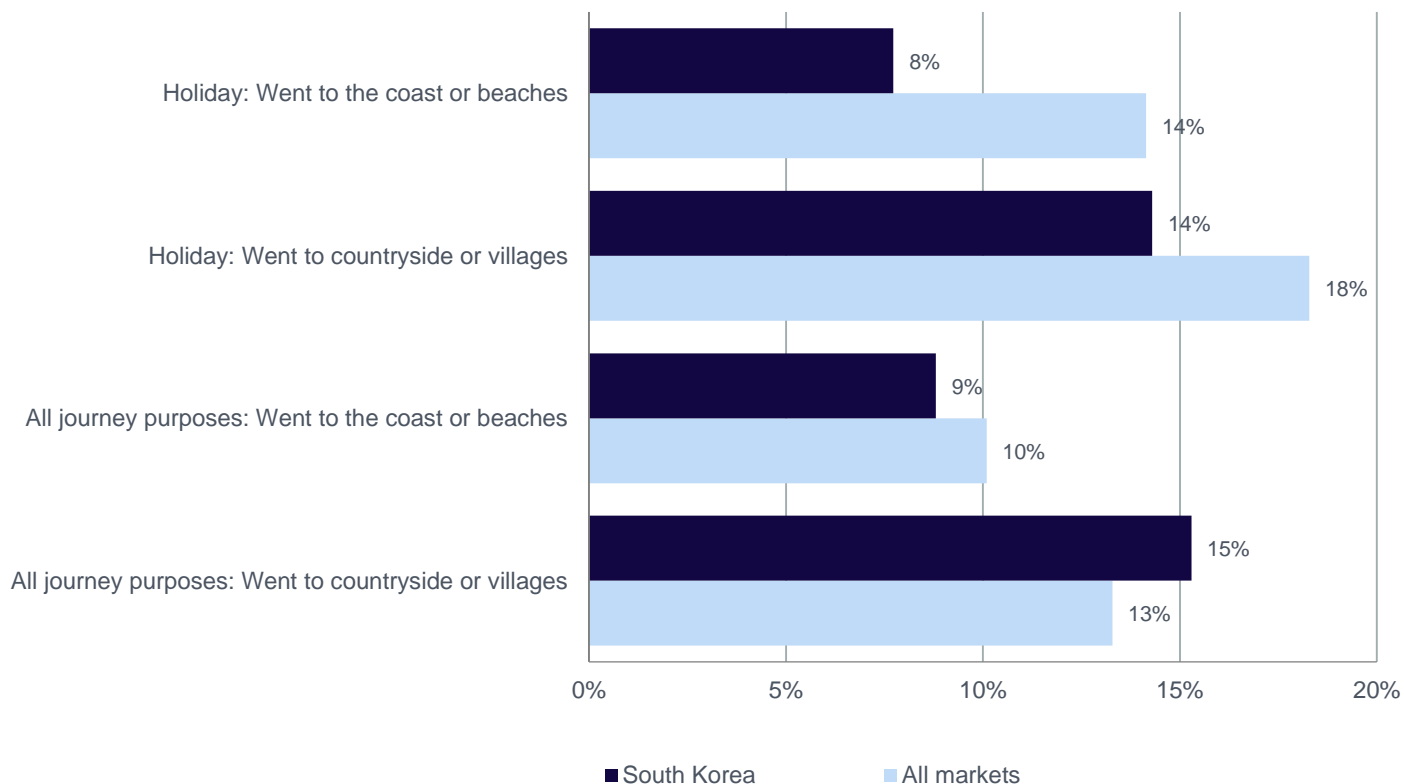
- London is the leading destination for a trip to the UK. 61% of the nights spent in the UK by visitors from South Korea were in London, compared to 40% of all inbound visitors' nights, in 2014-2016.
- About a third of the nights spent in the UK by South Korean visitors were spent in the rest of England, 32% on average in 2014-2016, compared to the all-market average of 48%.
- South Korean visitors to the UK spent slightly less time in Scotland than the all-market average (6% vs 8% respectively).
- South Korean holiday visitors are more likely than the all-market average visitors to buy a package or all-inclusive tour when to visit the UK* (20% vs 16% respectively).
- South Korean visitors are slightly more likely to go to the British countryside or villages than to the British coast or beaches.
- Overall, there are also slightly more South Korean visitors that bought transport services in the UK than the all-market average.
- South Koreans are more likely to use public transport too, but fewer would go on a train, a domestic flight, hire a car, or take a taxi within the city.

Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors; *To be defined as a package, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.



1.1 Key statistics: visits to coast, countryside and villages

Propensity to visit coast, countryside and villages

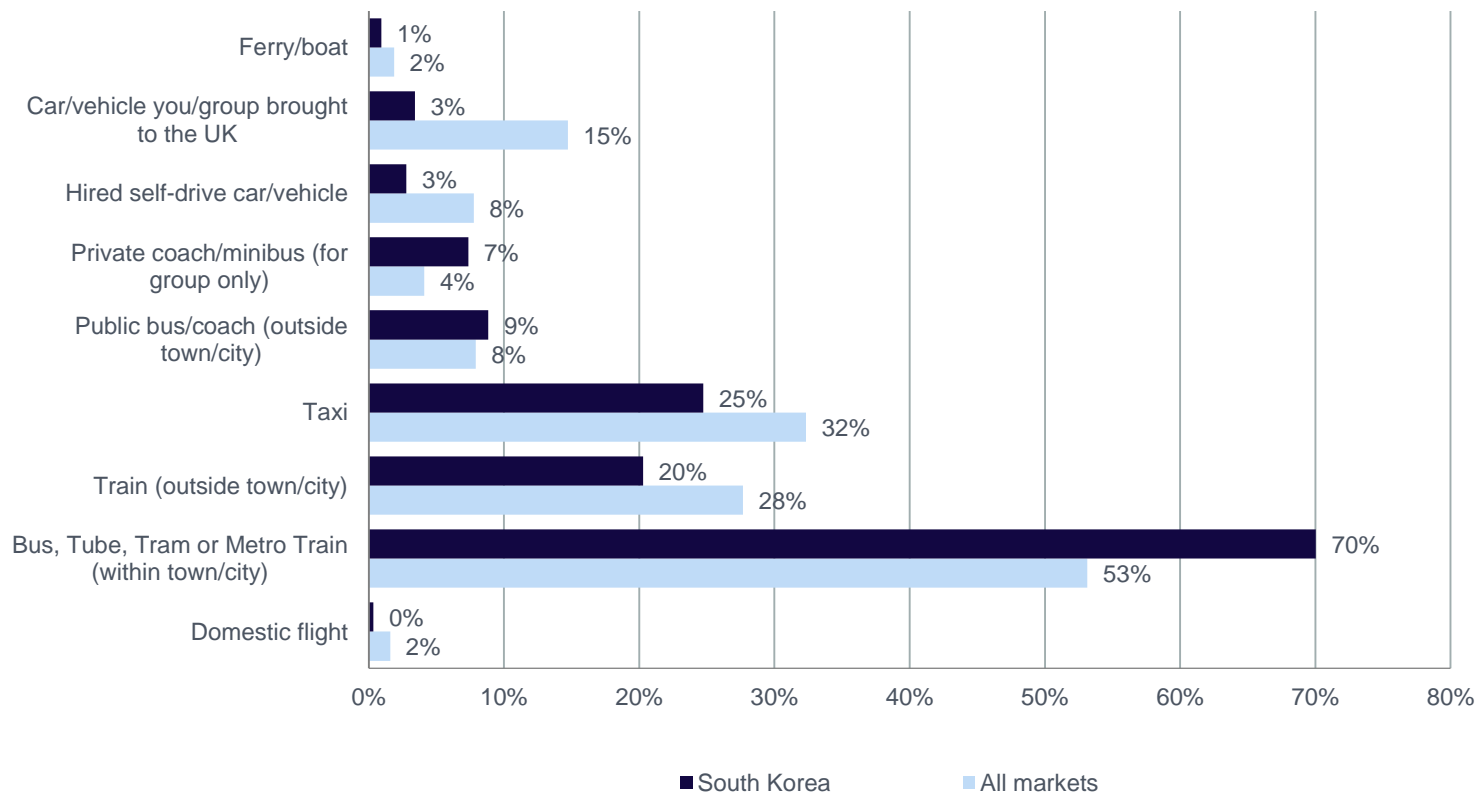


Source: International Passenger Survey by ONS 2016



1.1 Key statistics: use of internal modes of transport

Propensity to use internal modes of transport

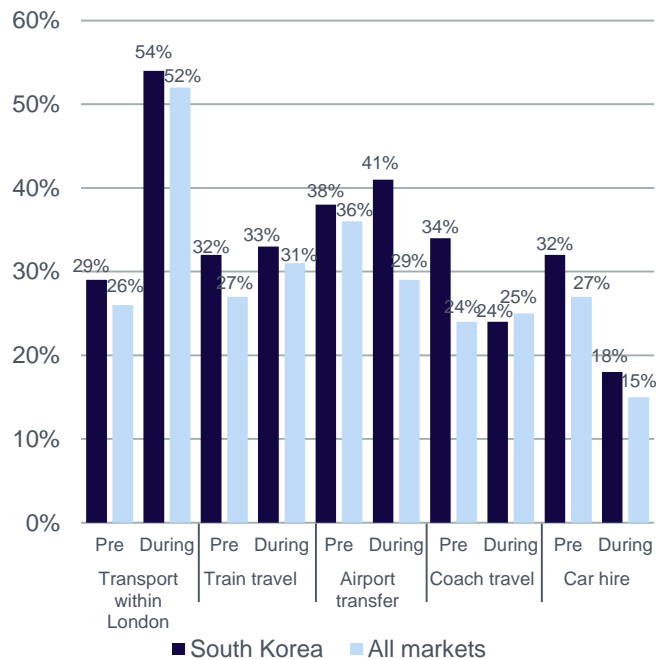


Source: International Passenger Survey by ONS, 2013

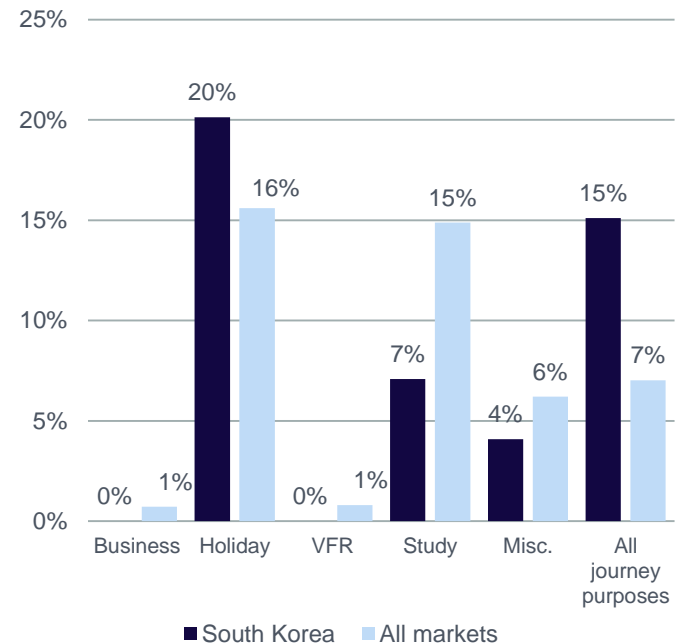


1.1 Key statistics: purchase of transport and package tours

Transport services purchased before or during trip (%)



Proportion of visits that are bought as part of a package or all-inclusive tour* (2014-2016)



International Passenger Survey by ONS, 2016. VisitBritain/IPSOS 2016, base: visitors; *To be defined as a package, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.



1.2 Visitor demographics

Visitor characteristics

- About as many visits from South Korea to the UK are made by men and women (49% vs 51% respectively, on average between 2014 and 2016).
- Just over 1-in-3 South Korean visitors were aged 25-34 years old in 2014-2016. This age group has seen steady growth in recent years. The 35-44 age group is the next most numerous.
- Visitors from South Korea to the UK tend to be younger than the all-market average visitor to the UK.
- 94% of departing staying holiday visitors from South Korea in 2015 were 'very' or 'extremely' likely to recommend Britain for a holiday or short-break, which is on par with the all-market average (95%).

3-in-4

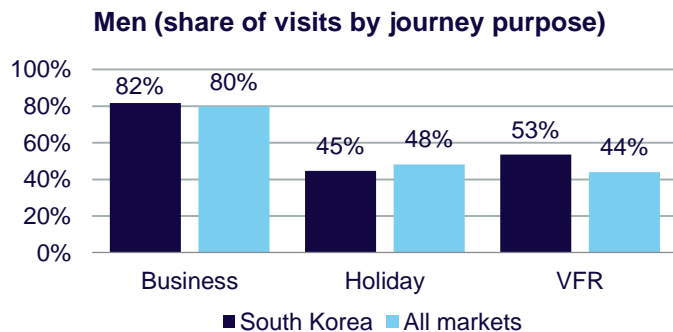
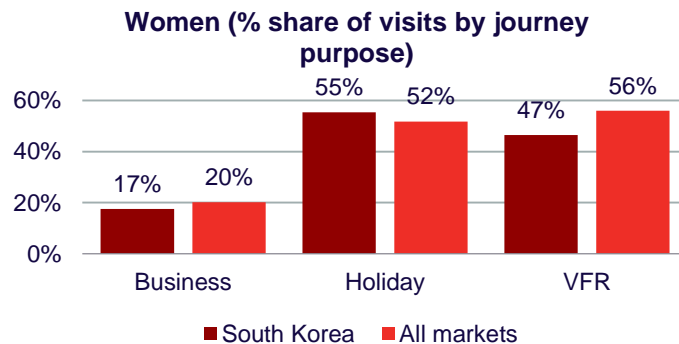
staying holiday visitors from South Korea to the UK would be extremely likely to recommend a short break or holiday to the UK to their friends and relatives

Source: International Passenger Survey by ONS



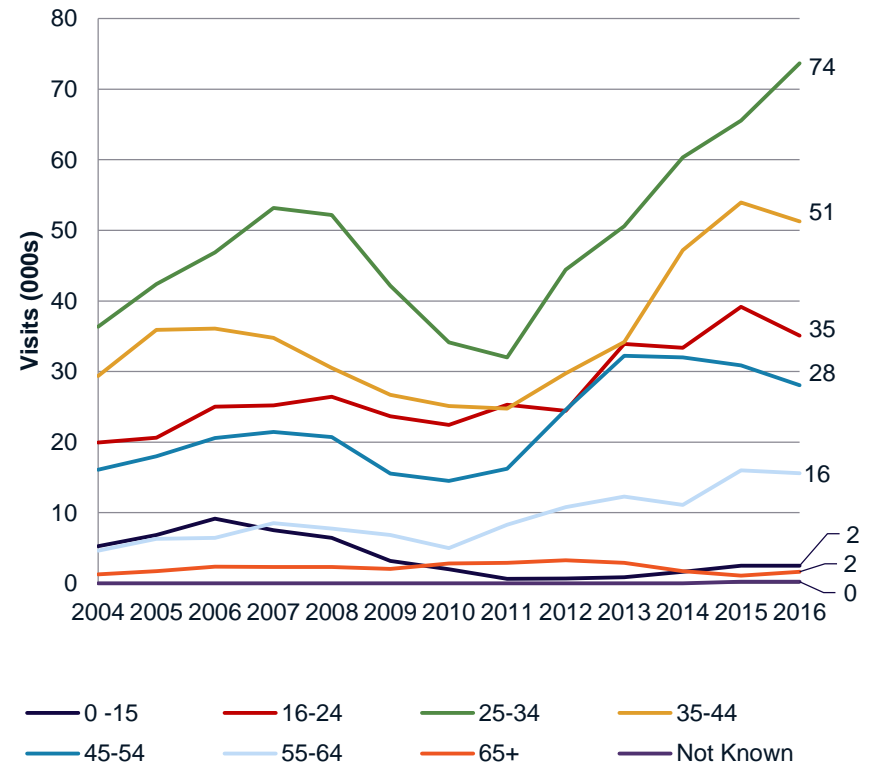
1.2 Visitor demographics: gender and age groups

Visitor demographics (2014-2016):
gender ratio of visits from South Korea:
51% women, 49% men



Age group trend

(average visits in 000s on rolling 3 years ending in)

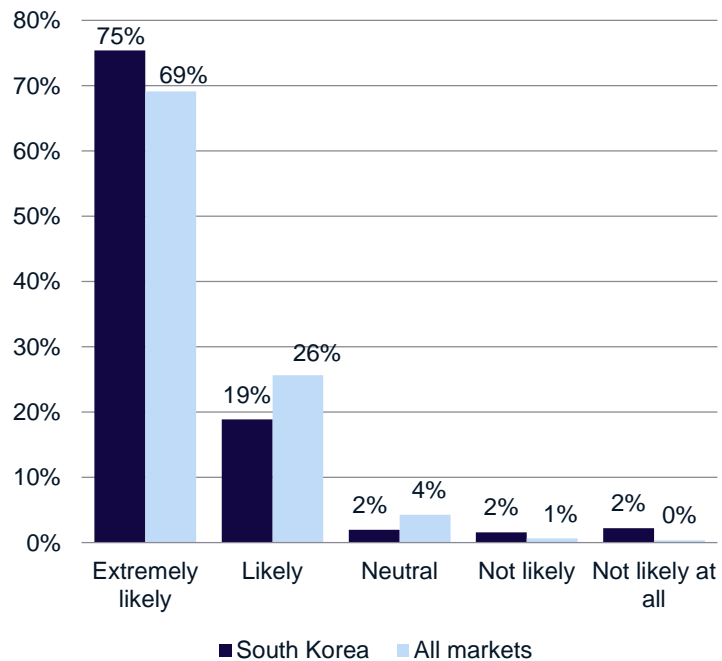


Source: International Passenger Survey by ONS, note: VFR and Business ratios are based on reduced sample sizes for South Korean data



1.2 Visitor demographics: recommending Britain

Likelihood to recommend Britain



Source: International Passenger Survey by ONS, 2015



1.3 Britain and competitors

Market size, share and growth potential

- Britain was the 5th most visited destination in Western Europe by South Korean travellers for overnight trips in 2016, behind France, Germany, Austria and Switzerland. It was 7th most visited overall in Europe, with the Czech Republic and Croatia the two most commonly visited.
- In 2016, 75% of outbound overnight trips taken by South Korean residents were to Asian destinations, and an additional 8% were to the United States. The USA was their third most visited destination overall, behind Japan and China.
- In comparison, there were almost as many overnight visits from South Korea to all Western European countries added together as to the USA in 2016 (1.9 million vs 2.0 million visits respectively). For this reason, we will consider the USA outside of the UK's destination competitor set.
- Looking at the destination competitive set, the UK has seen its market share of South Korean tourists decline, while new destinations in Europe, such as Czech Republic or Switzerland, have emerged. Forecasts, however, imply a slight increase in market share.

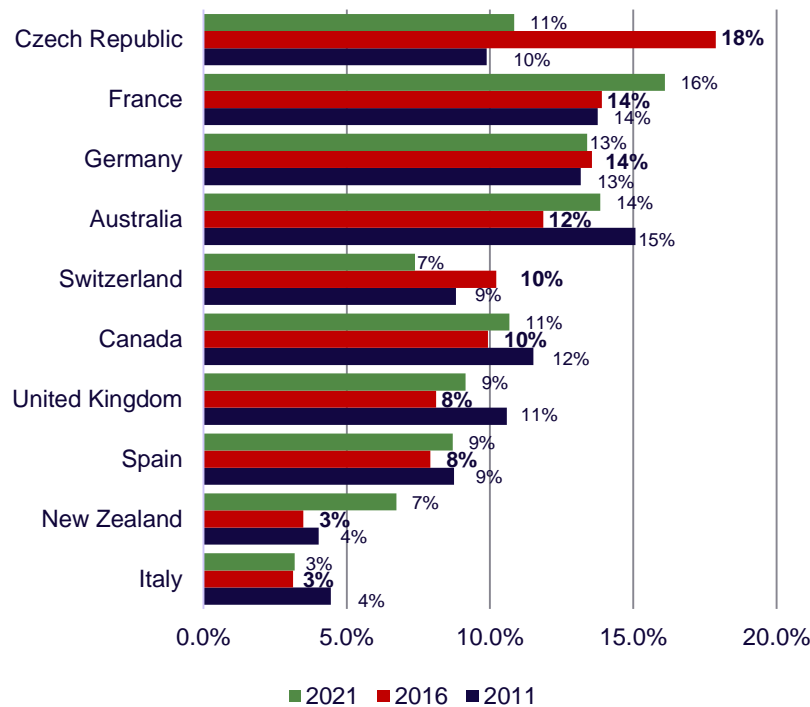


Source: Oxford Economics



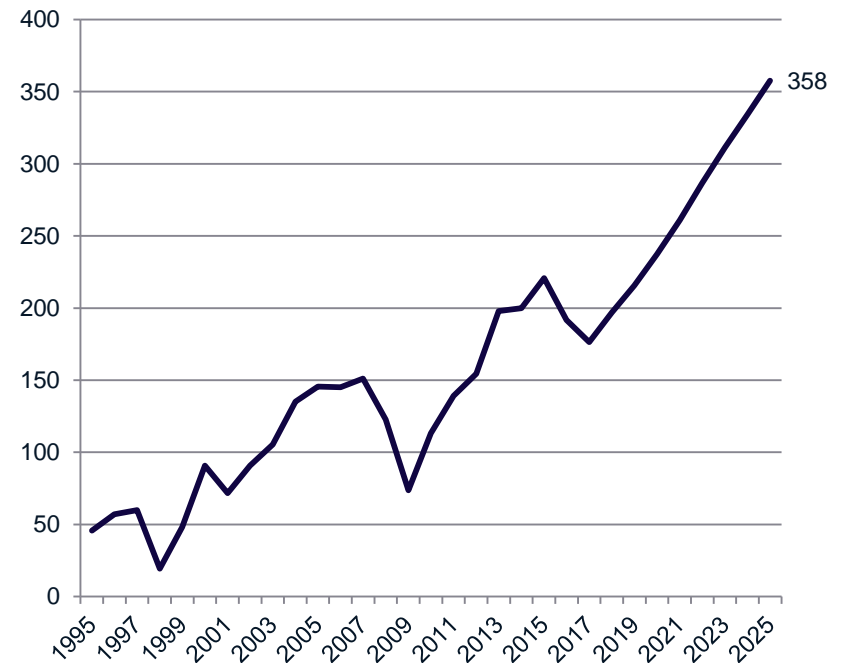
1.3 Britain and competitors

Britain's market share of South Korean outbound visits among competitor set



Source: Oxford Economics, based on overnight visit

Historic and potential visits to Britain (000s)

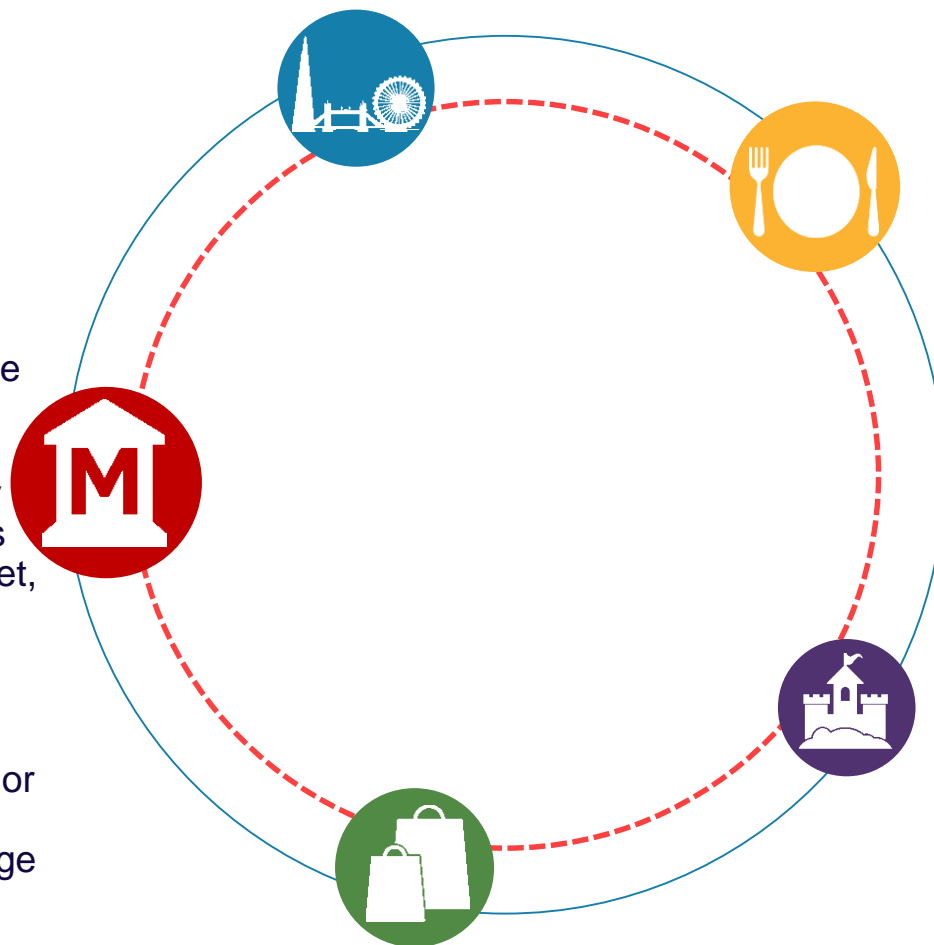




1.4 Inbound activities

Inbound Britain activities

- Visiting museums and art galleries is the most popular activity for South Koreans visiting the UK, followed by dining in restaurants, and shopping. Sightseeing famous monuments/ buildings and visiting castles or historic houses also often feature in visits from this country to the UK.
- South Korean visitors to Britain are mostly interested in cultural activities: overall they are more likely than most inbound markets to watch live performances, such as a ballet, opera or musical, or in visiting some built heritage sites.
- However, they are less likely than average to participate in nature-related activities, such as cycling, visiting parks or gardens, or walking in the countryside or along the coast. They are also less likely than average to dine in restaurants, visit pubs, socialise with locals or go shopping.

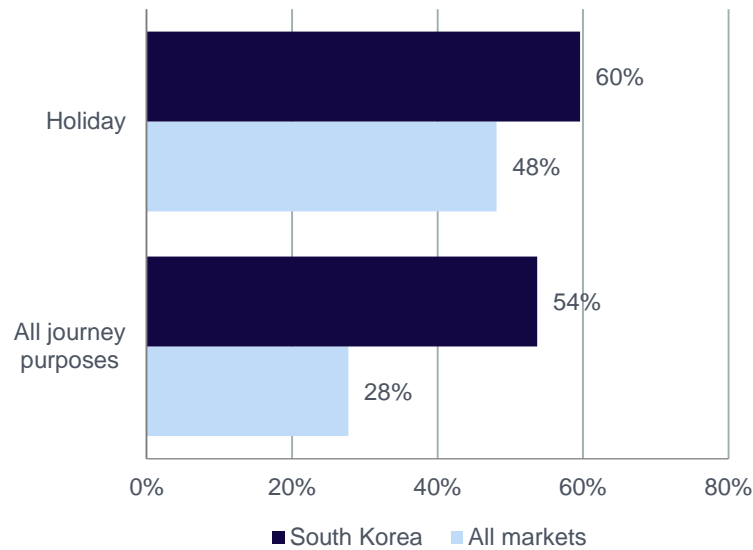


Source: International Passenger Survey by ONS, rankings based on 2006-2016 data

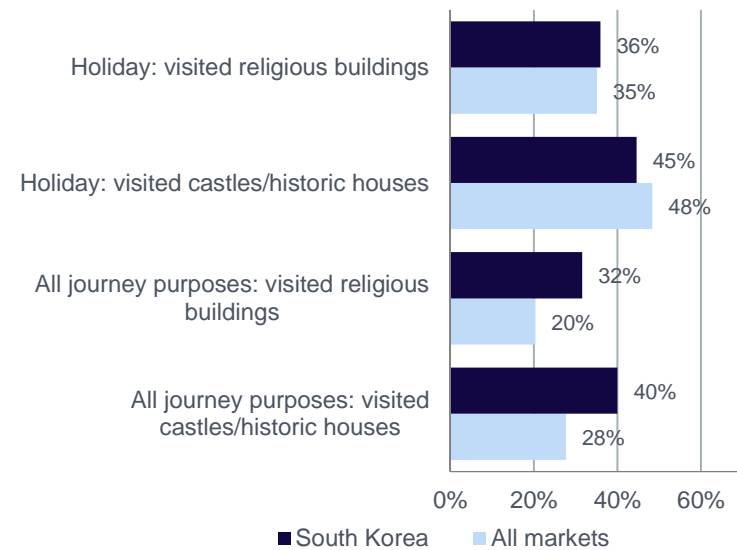


1.4 Inbound activities

Propensity to visit museums and galleries



Propensity to visit built heritage sites

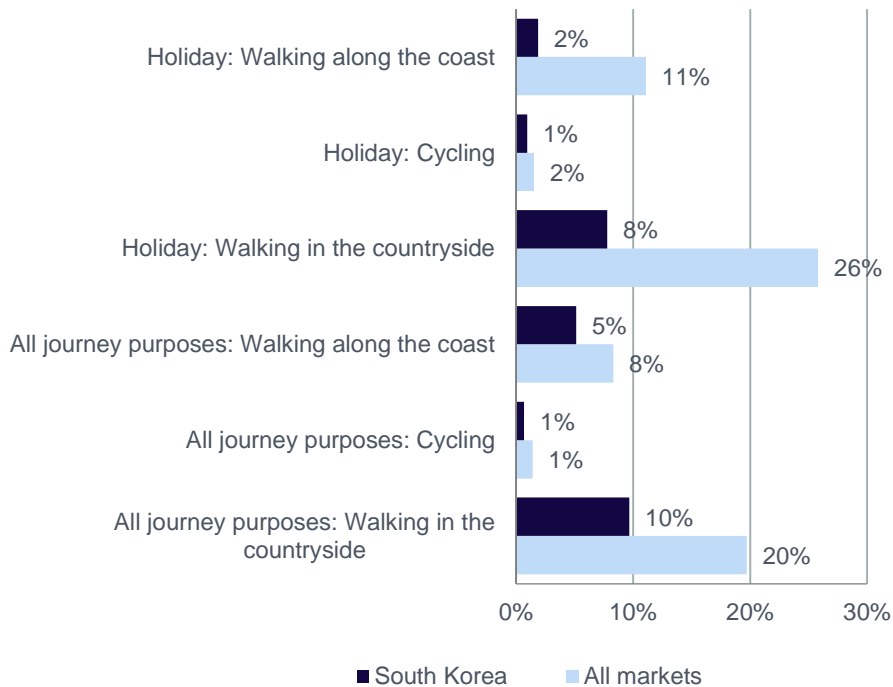


Source: International Passenger Survey by ONS 2016

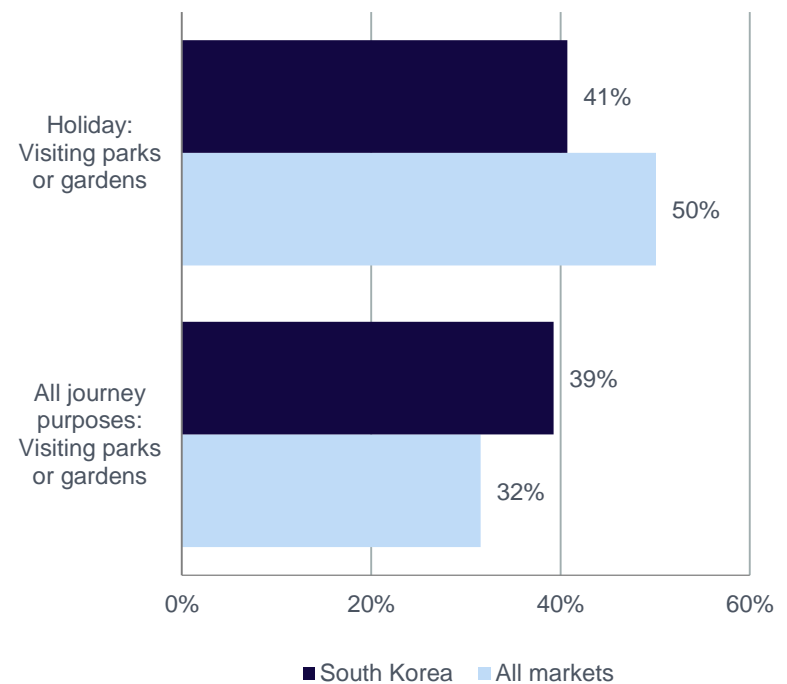


1.4 Inbound activities

Propensity to go for a walk or cycle



Propensity to visit a park or garden

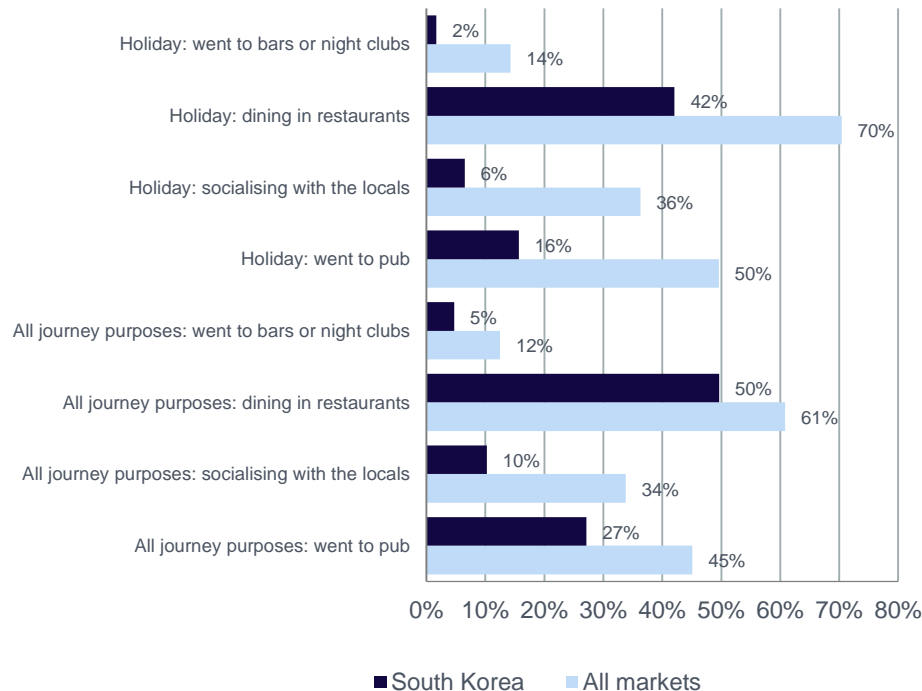


Source: International Passenger Survey by ONS 2007, 2010 and 2016

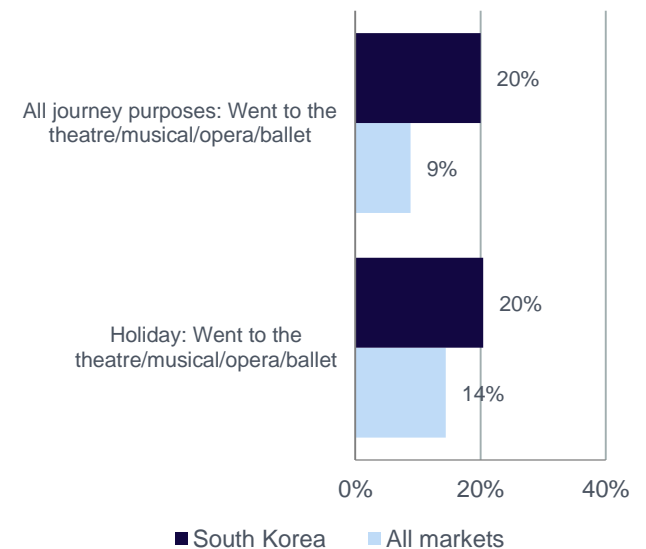


1.4 Inbound activities

Propensity to go to restaurants, go to pubs, and socialise with locals



Propensity to attend the performing arts

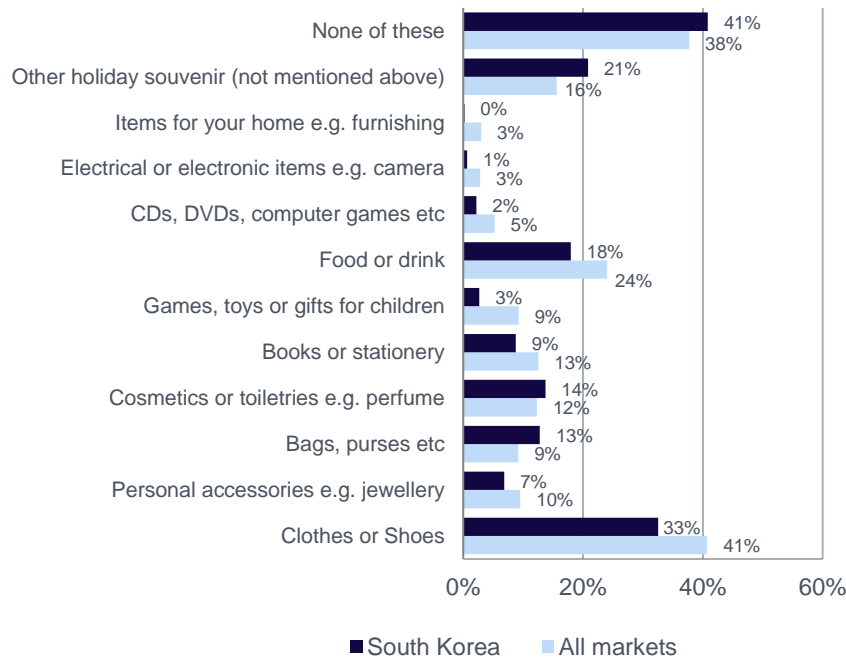


Source: International Passenger Survey by ONS 2007, 2008, 2011 and 2013

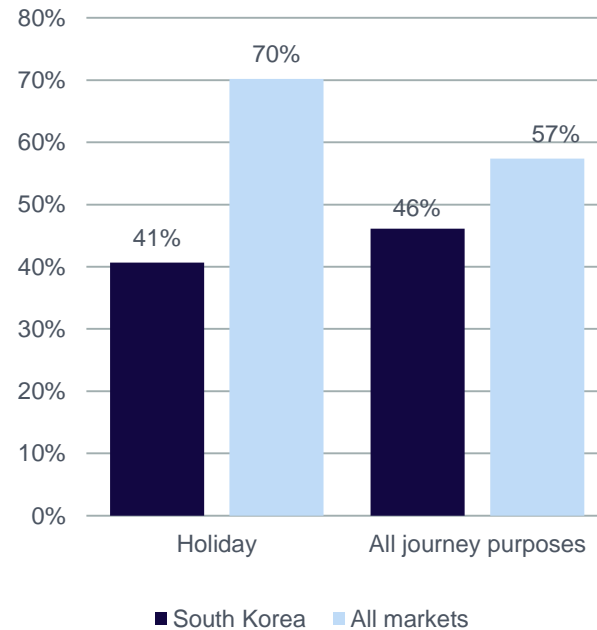


1.4 Inbound activities

Propensity to purchase selected items



Propensity to go shopping



Source: International Passenger Survey by ONS 2011 and 2013



Chapter 2: Understanding the market





2. Understanding the market

Chapter summary

- In early 2018, South Korea was under the worldwide media's scrutiny as it hosted the Winter Olympic Games. It showed a changing nation, trying to get closer to its Northern neighbour and to relax a difficult geopolitical context.
- With one of the lowest fertility rates globally, it is an ageing society, with growing concerns about age challenges and health.
- On the other hand, the government has recently voted changes to legal working hours that will provide working South Koreans with more leisure time, opening the door to new leisure trends to come.
- Most South Koreans book their trip to Britain online. When booking travel and accommodation together as a package, South Korean visitors are more likely than the all-market average to book over the phone (17% vs 8% in 2016). They also have shorter lead times for booking their trip to Britain than most markets.
- A majority of South Korean holiday visitors chose Britain as a destination because of its cultural attractions. South Koreans have a high opinion of British culture, ranking it 3rd out of 50 nations in 2017.



Source: CIA World Factbook, VisitBritain/IPSOS 2016, United Nations World Population Prospects 2015, Anholt-GfK Nation Brands Index 2017



2.1 Structural drivers

Demographics & society

- South Korea is a presidential republic; the first free presidential elections were held in 1987.
- It is composed of 9 provinces, 6 metropolitan cities, one special city, Seoul, and one special self-governing city, Sejong.
- Mountainous areas represent about 70% of the country so most of the South Korean population concentrate in the lowland areas. The Gyeonggi Province is the most densely populated province, with Seoul, the capital, and Incheon, one of the 6 metropolitan cities.
- According to the UN's World Population Prospects 2015, the South Korean population is older than the global average and ageing: its median age was 40.6 years old in 2015, while the overall world's median age was 29.6. The South Korean median age is forecast to be over 53 by 2050.
- Full-time workers are entitled to 15 days of paid annual leave a year as a minimum, provided they attended at least 80% of their work days the year before. Depending on seniority, South Korean workers can get up to 25 days of paid annual leave.



Source: Oxford Economics, CIA World Factbook 2017, UN's World Population Prospects: The 2015 Revision, www.koreanlaborlaw.com



2.1 Structural drivers: population and economic indicators

Population dynamics

Measure	2017 estimate
Total population (m)	51.0
Median age (years)	41.8
Population growth rate (2017-2022)	1.6%

Economic indicators (% growth)

Indicator	2017	2018	2019	2020
Real GDP	3.1%	2.9%	2.8%	2.5%
Real consumer spending	2.6%	2.6%	2.3%	2.3%
Disposable income	4.1%	4.3%	4.3%	4.2%
Consumer prices	1.9%	1.6%	2.0%	2.0%

Source: Oxford Economics, CIA World Factbook 2017



2.1 Structural drivers: general market overview

General market conditions

- With one of the lowest fertility rates in the world (1.26 child per woman estimated in 2017), the South Korean population is ageing; however it is still growing slowly.
- South Korean workers get between 15 and 25 days of annual leave depending on seniority, and attendance the year before. However, it is common for South Koreans not to take all their allowed, paid leave days, although this trend has been easing in recent years.
- The South Korean economy is still growing although 2018 forecasts show a marginally slower growth rate than in 2017. Consumer spending should maintain a similar healthy growth rate in 2018.
- However, some risks exist as South Korean economic growth is still dependent on its exports; a trade war would be detrimental to South Korean growth. Political tensions in the area could also impact the South Korean economy, especially fears about nuclear power in North Korea. For the moment, though, the recently-elected South Korean president Moon Jae-in has been trying to ease tensions with neighbouring North Korea, as the recent Winter Olympic Games in Pyeongchang showed.
- South Korea also ranks quite high globally for its volume of HNWI**: it ranked 13th largest source market of HNWIs in 2016, with about 208,000 HNWIs (up 8% on 2015).

Key demographic and economic data

Measure (2017 data)	South Korea
Population (m)	51.0
GDP per capita PPP* (US\$)	39,782
Annual average GDP growth over past decade (%)	3.1
Annual GDP growth in 2017 (%)	3.1

Source: Oxford Economics, CIA World Factbook 2017,

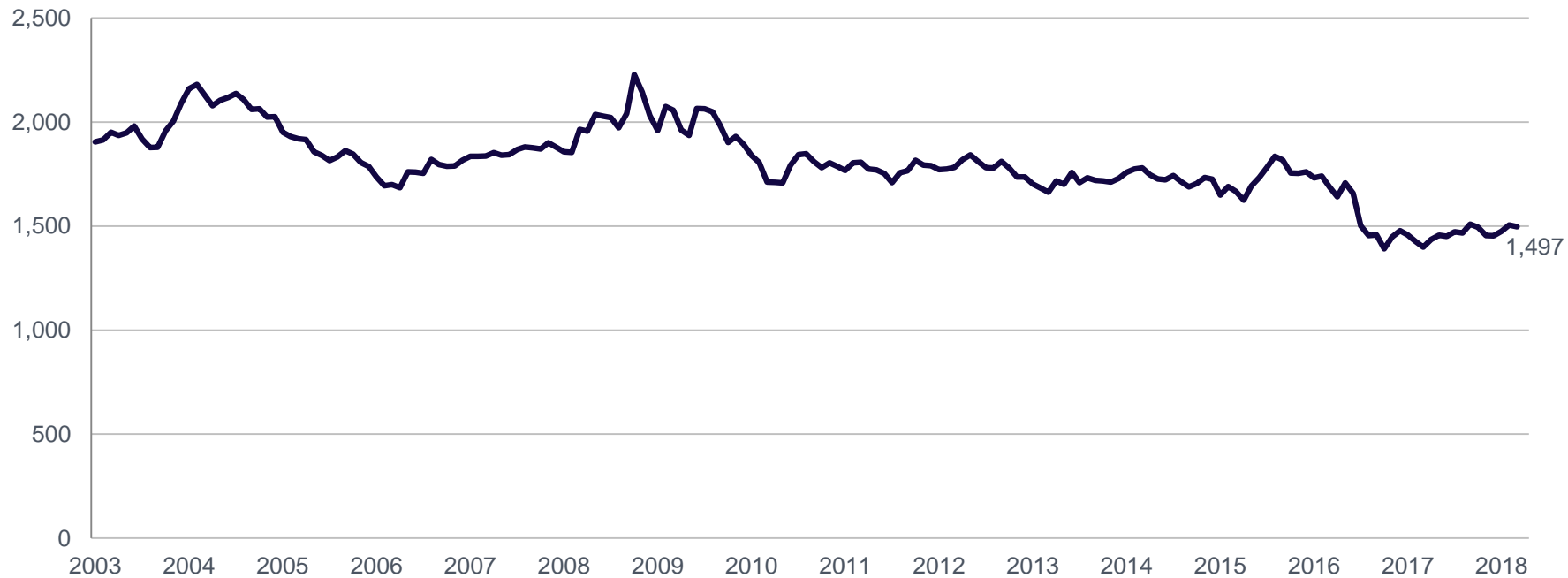
UN's World Population Prospects: The 2015 Revision, www.koreanlaborlaw.com, Capgemini World Wealth Report 2017

*Purchasing Power Parity, adjust the GDP value for price differences; **HNWIs: stands for High Net Worth Individuals, people whose liquid assets are worth US\$1m or over



2.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in KRW)



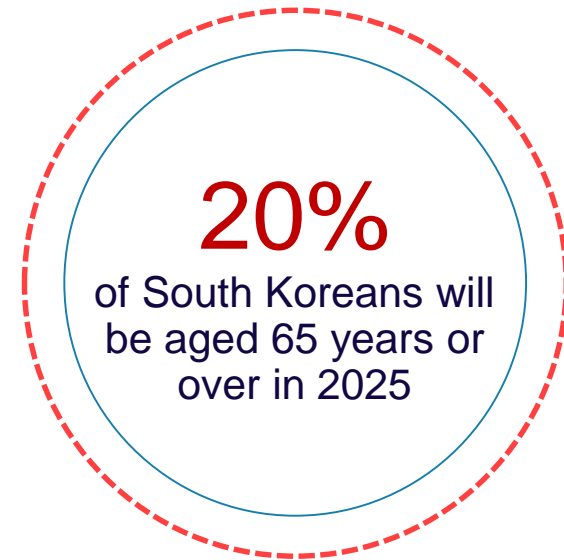
Please find the most up-to-date exchange rate trend based on monthly averages at [visitbritain.org/visitor-economy-facts](https://www.visitbritain.org/visitor-economy-facts).

Source: Bank of England



2.2 Consumer trends

- In 2016 South Koreans made 25 million overnight trips abroad. About 35 million such trips are forecast to be made in 2021, showing good growth potential for this outbound market.
- Recent measures announced by the government should enhance leisure trends in society. Maximum working hours have been reduced from 68 hours to 52, which should encourage people to pursue their hobbies and dedicate more time to leisure.
- FIT (free independent travel) is a growing segment in South Korea, partly thanks to the internet penetration rate, one of the highest in the world.
- Security and safety plays an important role in the decision of a holiday destination for South Korean travellers: health issues are a key concern among South Koreans, especially as the population is ageing.
- It is common to see South Koreans travel in the pursuit of a specific interest, most widely culture, or shopping among the those travelling on their own or within a group.



Source: Oxford Economics



2.2 Consumer trends

A changing mindset and society

- The South Korean economic system has been highly oriented towards productivity: until very recently workers could work up to 68 hours a week and it was not unusual that people would not take up all their annual holiday allowance. Long trips are also quite uncommon. The nation also had the highest suicide rate in the world, which has long been attributed to the work pressure. However, changes have started to happen in the past few years in the South Korean society.
- Very recently the calendar in 2017 had two bank holidays so close together that the government decided to declare the working day left between the Harvest festival and the National Foundation Day an exceptional, one-time public holiday too. This offered people nationwide the possibility of a long 10-day time off, and so a one-time opportunity to travel abroad which many took.
- Even more recently, the government passed a change in the working hours law: people will now work between 40 hours a week and a maximum of 52 hours, as well as reducing working hours for young people too. Despite worries about getting lower salaries for their new working hours, working age South Koreans will now have more time for leisure, hopefully enhancing their already existing appetite for leisure activities as they have more time to pursue them.
- The younger generation of working people in South Korea is already going on more short trips abroad than before. The development of low cost carriers in this region have made cheaper, short breaks in the region more accessible.
- The rapid uptake of the Internet in South Korea, which has one of the highest Internet penetration rates in the world, has also given South Koreans more options for leisure activities, sources of information, and even inspiration. In the travel industry this translates into a growing FIT (Free and Independent Traveller) segment, picking what suits them best in all available traditional and online travel options and services.
- The hosting of the 2018 Winter Olympics in South Korea saw increased interest in sport in a country arguably more known for gaming. This could impact travel and leisure trends in the next few years.



2.2 Consumer trends: travel trends

Security and safety concerns

- As we have seen before, the South Korean society has one of the lowest fertility rates, and an ageing population among which health concerns are quite high.
- As most people work hard their whole life, they will have the means and time to travel at retirement. It is an important travel segment for this market, quite different from others: health concerns are higher, levels of English are not as strong.
- Security and safety when travelling, especially abroad, are prime concerns for many. Travelling as part of a group would be seen as a good way to address those concerns.
- The Middle Eastern Respiratory Syndrom outbreak in 2015 made South Koreans even more conscious of travel safety issues. It also had a direct effect on travel patterns. During that year, some South Koreans stayed at home instead of going abroad, even when they had planned holidays.

Importance of special interest travel

- Among South Korean travellers, some travel to pursue a specific interest.
- South Koreans are well exposed to media and culture in general. They are also curious travellers. Cultural tours are quite popular and many tour operators develop such offers for both families and older travellers who no longer have children at home and so have more opportunities to travel and discover the world.
- Food tours or tours about visiting places of interest related to a show or a movie also attract interest.
- Another important segment in South Korea is active, single women travelling in their 30s or 40s who travel to reward and treat themselves, indulging in premium experiences, and/or going shopping. Some tour operators and online travel agents are offering special tours and products to address their specific needs.



2.3 Booking and planning

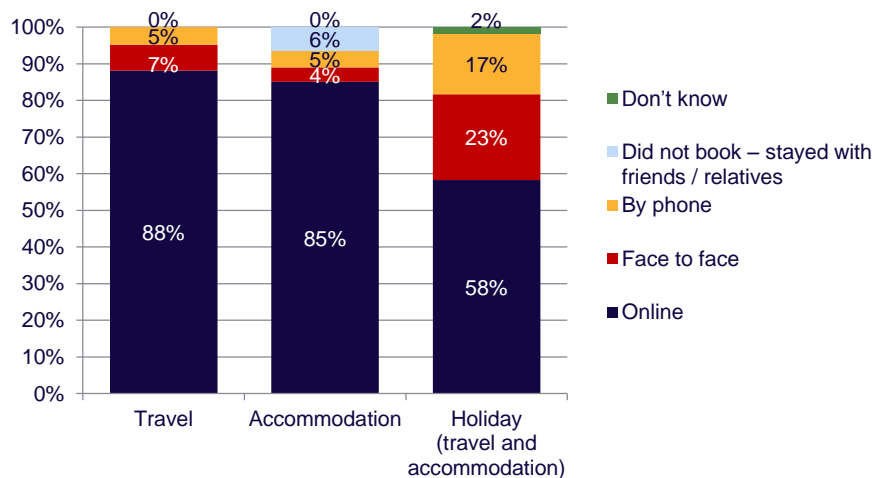
- South Korean visitors have slightly shorter lead-in times compared to the other inbound markets for deciding on a destination, looking at options and prices and booking their trip to Britain. However, they would be starting to think about their trip roughly at the same time as most markets.
- About 4-in-10 South Korean visitors looked at options/prices for their trip to Britain 1 to 2 months before their departure, and a similar proportion booked it in the same timeframe.
- South Korean holiday visitors to Britain are slightly more likely to have booked their transport and accommodation together than the average visitor (58% compared to 50% respectively).
- Whether they booked those elements separately or together though, most South Korean holiday visitors booked their trip online. To do so they mostly used their laptop or desktop, but South Korean holidaymakers were also more likely to use their smartphones to book their trip to Britain elements than the average, especially by using apps.
- When booking transport and accommodation together, they were also more likely than average to do it over the phone.
- Finally, they prefer planning in advance and so would be more likely than average to buy attraction or event tickets before they arrive to the UK.





2.3 Booking and planning: booking channels and ticket sales

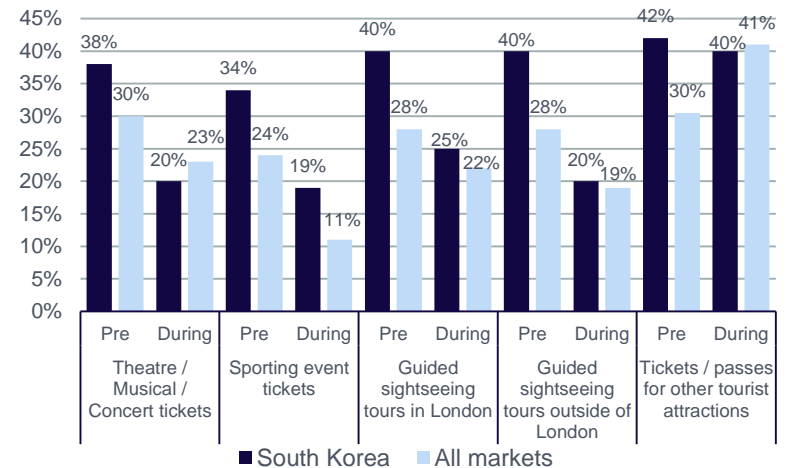
How trips to Britain were booked



- South Korean visitors are quite digital-savvy, with most booking travel to the UK and accommodation online, when these elements were bought separately.
- However, when booking them as a holiday package, they are even likely to do so online than the all-market average (58% vs 64%), almost as likely to book face to face (23% vs 26%) and more so by phone (17% vs 8%).
- Most South Koreans booked their holiday indirectly, i.e. through a travel agent, tour operator or comparison site.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

Propensity to make a purchase before or during trip

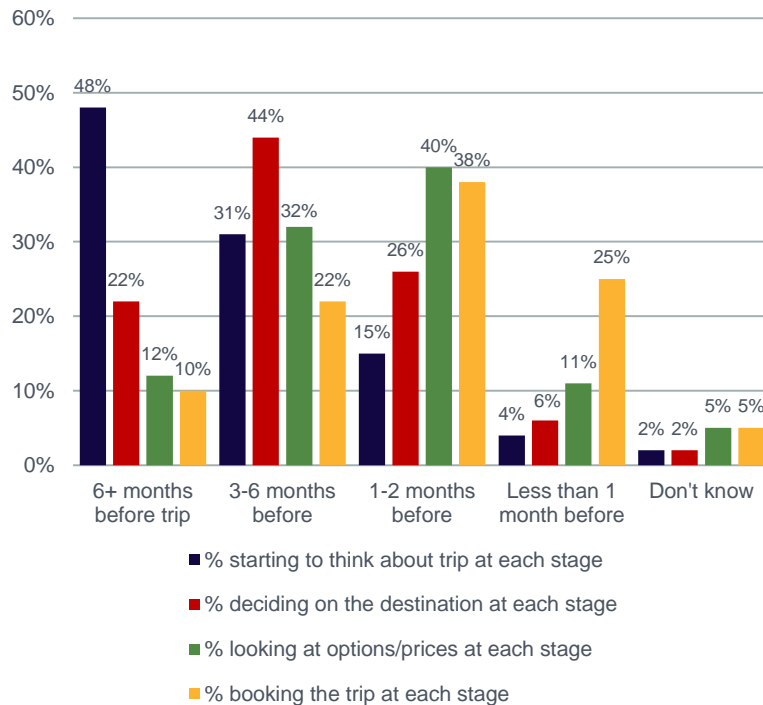


- South Korean visitors were more likely than average to have purchased tickets to an event, a tour, or an attraction before their trip to the UK.
- They would usually be more likely to have bought such tickets than the all-market average before or during their trip, especially tickets to sporting events.
- 78% of all South Korean international travellers said they like planning their holidays carefully before they leave, and fewer than half said they would enjoy spontaneous activities.



2.3 Booking and planning: lead-times

Decision lead-time for visiting Britain



Source: VisitBritain/IPSOS 2016, base: visitors

- South Korean visitors follow the all-market average when it comes to when they start thinking about their trip. However, they decide on their holiday destination slightly later than the average visitor (22% decided to visit Britain over 6 months ahead, compared to 32% across all markets).
- South Korean visitors to the UK also have shorter lead-in times than the all-market average when it comes to looking at options and booking their trips.
- While 1-in-5 holiday visitors on average across all surveyed markets had started to look at options and research prices to visit the UK 6 months or more before their trip, only about 1-in-8 had done so among South Korean holiday visitors. 40% of them would do so one or two months prior to their departure, against 27% across all markets.
- The critical booking period is between one and two months before their trip to the UK with 38% of South Koreans visitors booked in this timeframe, compared to 28% across all markets. An additional 1-in-4 South Korean visitors also booked in the month leading to their trip to the UK, which over indexes slightly on the all-market average too (25% vs 21% respectively).
- Finally, South Korean visitors were slightly more likely than average to have bought their transport and accommodation for their UK trip together (58% vs 50% for all markets).



2.4 Reaching the consumer

- South Korea has the second highest internet penetration rate in Asia, just behind Japan.
- Traditional media, though, still have high penetration amongst South Koreans. Both TV and print media remain influential. However, their digital versions are quite important too and have allowed newspapers and magazines to remain popular in some cases.
- Technology adoption is well-spread in South Korea, home to world-renowned manufacturers such as Samsung. Mobile technologies are widely adopted too.
- South Koreans are usually quite active on social media. The international players are well represented in the market (such as YouTube, Facebook, and Instagram) but other actors, local or regional, also feature in the top social media by penetration rate in the market: Kakaotalk, LINE or WeChat.
- When it comes to choosing their holiday destination, South Korean international travellers are mostly influenced by online sources: information from search engines, travel blogs and then word of mouth

Internet penetration rate in South Korea in July 2017:

92.7%

Source: Statista, VisitBritain IPSOS 2016



2.4 Reaching the consumer: traditional media landscape



Press

- Freedom of speech is assured in South Korea and the press is an active sector.
- Three main publications dominate the market with over 2 million copies each sold daily. They mostly have conservative views, which can lead to some disagreement with the current government.
- Some of the most popular news titles are written in English.

TV



- Television remains the media with the largest audiences in South Korea, especially the main terrestrial networks, KBS and MBC.
- Most South Koreans also pay subscription to satellite TV, Internet Protocol TV (IPTV) or digital cable TV.
- Those all give access to diverse programmes. Movies and shows from English-speaking countries would be broadcast there, but South Korea also produces quality shows that are watched in the whole region, just as K-pop is a popular international music genre.



2.4 Reaching the consumer: connected media landscape



Internet

- 92.7% of South Koreans were Internet users in July 2017. This is just behind the Asian leaders, Japan, with 94%.
- This high penetration rate is backed up by good infrastructures: Internet services offered in South Korea are among the fastest. As a consequence, it is easier for South Koreans to explore their travel options online. Digital purchases are also increasing too.
- Gaming is also very popular in South Korea, and video games an important part of the cultural and media landscape. This high-quality internet provides opportunity for the large penetration of online gaming.

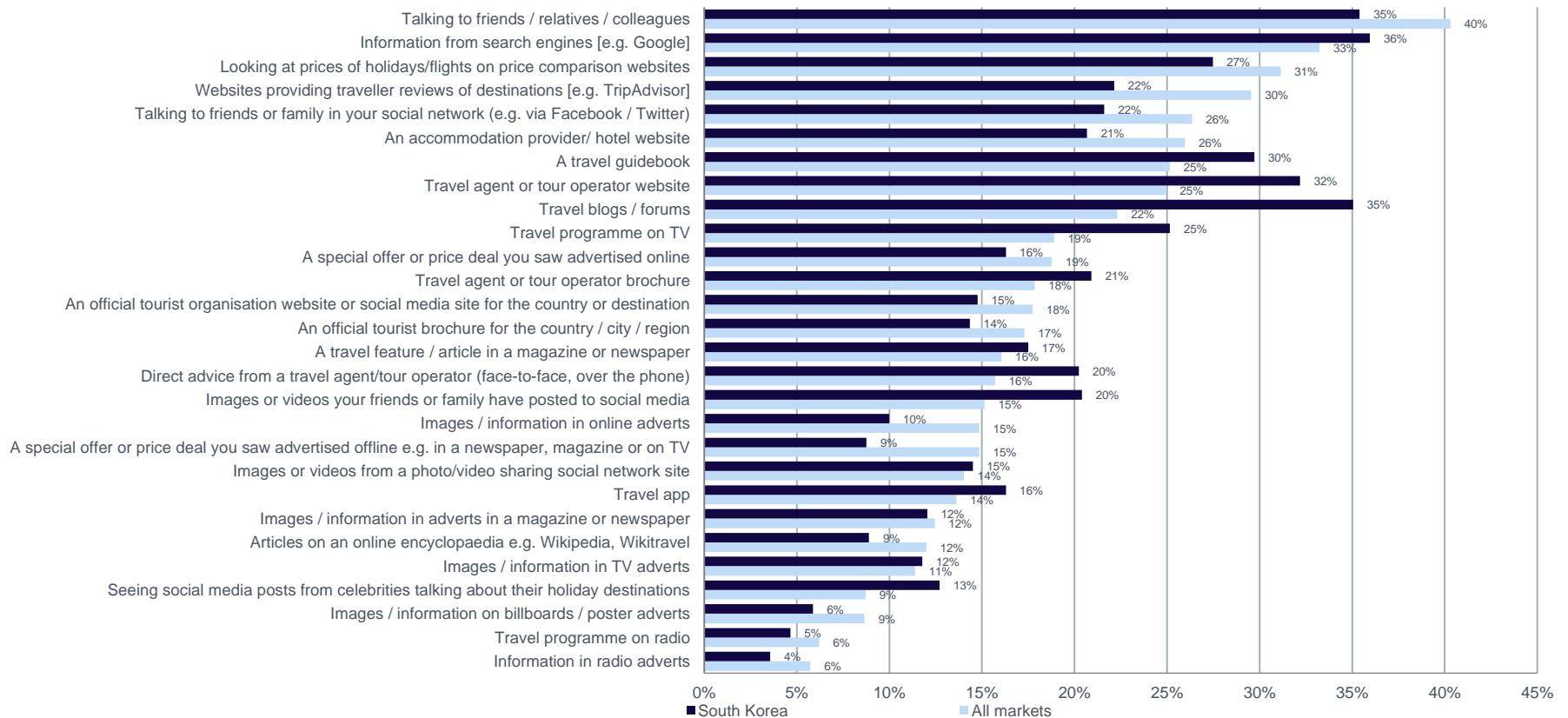
Social Media

- Social media are quite popular in South Korea. There were about 27.5 million social network users in South Korea in 2016, and projections show it should reach 31.8 million by 2021. It represents the highest active social media penetration in Asia as of 2016: 82% of South Korean Internet users.
- Among the top 3 most popular social media in the market is a local actor, KakaoTalk. This KaKao product boasts one of the highest daily penetration rate, along with Kakaostory, making this leading online company a top partner in this market.



2.4 Reaching the consumer: influences

Influences on destination choice



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)



2.5 Perceptions of Britain

- When asked the most important reasons for choosing Britain as a holiday destination, cultural attractions are the main reason why the South Korean holidaymakers chose the UK by far (about half chose this as a key motivation). The fact that the UK was a new destination where they hadn't been before, as well as its different culture compared to theirs, also appealed to many holidaymakers.
- South Korean travellers tend to look for a holiday destination where they can enjoy the beauty of the landscape, that will provide fun and laughter, and something to broaden their mind or stimulate their thinking. However, competitor destinations such as France, Italy, the USA or Australia are better perceived than the UK on their capacity to offer those to the South Korean holidaymakers.
- South Koreans rate Britain highly as a destination where they can visit world-famous sites, historic places, or watch a sporting event, or even go partying.
- A third of South Koreans would also include a visit to Buckingham palace to their itinerary in the UK. They usually have a positive image of the British culture, ranking it 3rd among 50 nations in 2017.

Biggest draws
to the UK for South
Korean holiday visitors:
**cultural attractions,
somewhere new, a
different culture
from their own**

Source: Arkenford 2013, VisitBritain/IPSOS 2016, Anholt-GfK Nation Brands Index 2017



2.5 Perceptions of Britain

Britain's ranking (out of 50 nations)

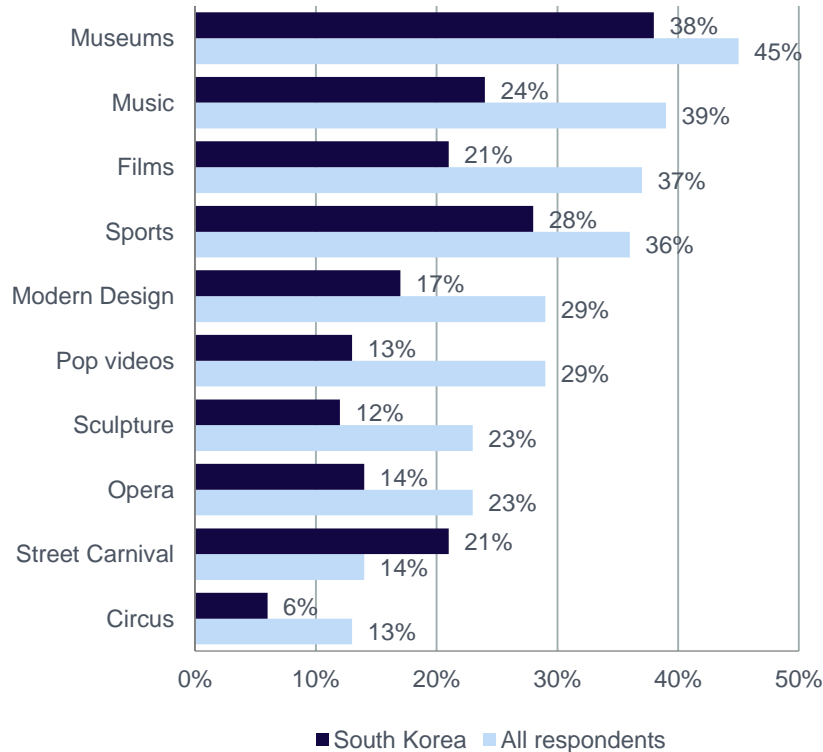
Measure	South Korean respondents	All respondents
Overall Nation Brand	5	3
Culture (overall)	3	5
The country has a rich cultural heritage	6	7
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	4	3
The country excels at sports	3	4
People (overall)	6	6
If I visited the country, the people would make me feel welcome	9	13
Tourism (overall)	7	3
Would like to visit the country if money was no object	8	6
The country is rich in natural beauty	26	24
The country is rich in historic buildings and monuments	7	5
The country has a vibrant city life and urban attractions	4	4

Source: Anholt-GfK Nation Brands Index 2017

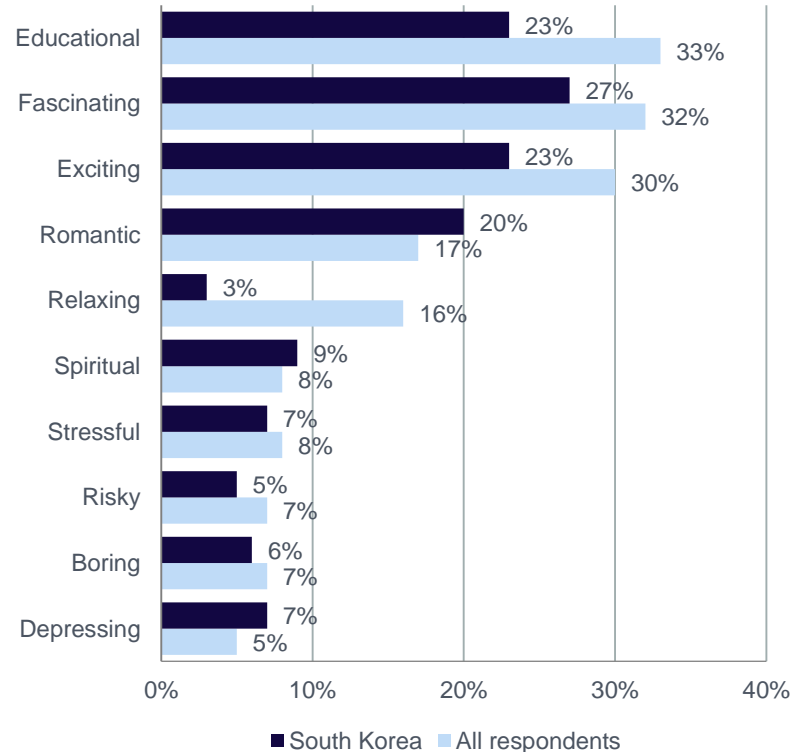


2.5 Perceptions of Britain

Cultural associations



Adjectives describing a potential trip to Britain



Source: Anholt-GfK Nation Brands Index 2017



2.5 Perceptions of Britain

Holiday wants and % saying destination is best place for...

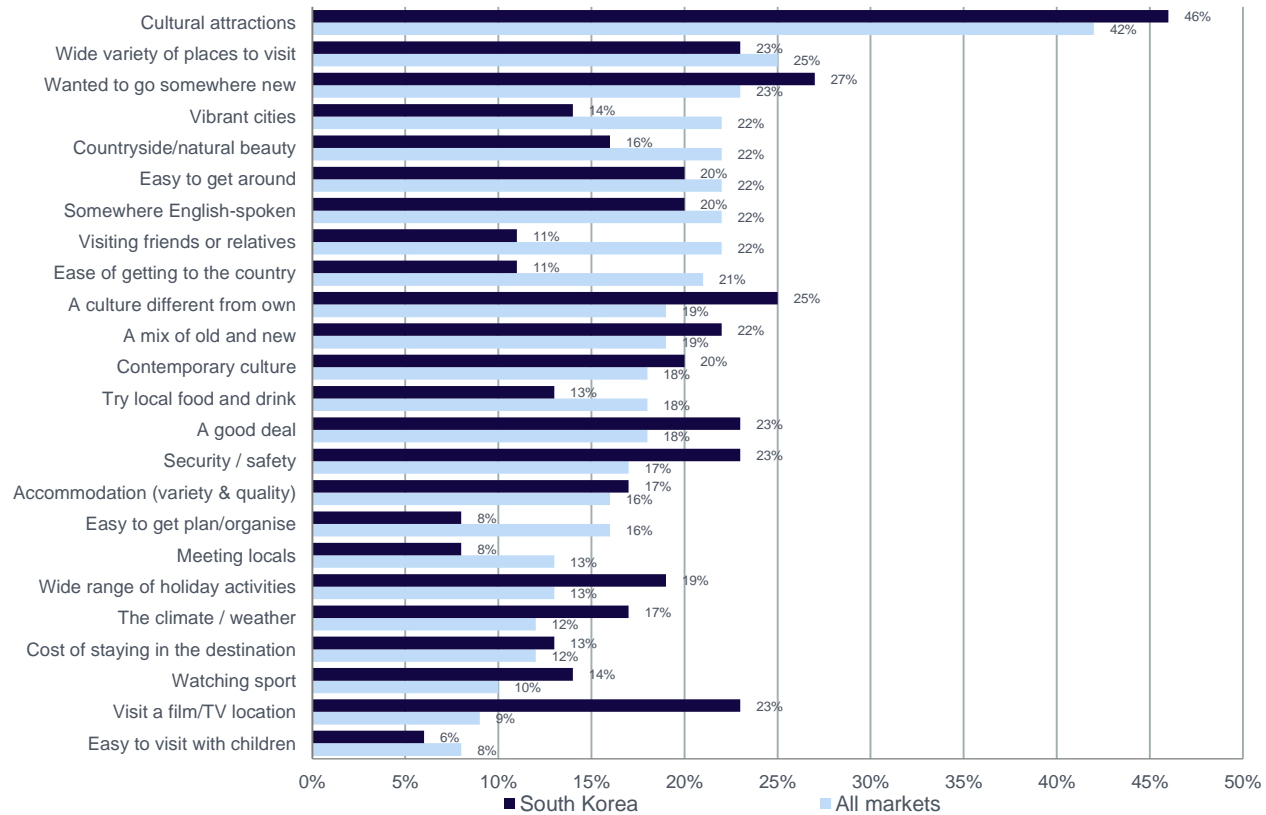
Importance		GB	FR	IT	AU	US	GE
5.95	Enjoy the beauty of the landscape	26%	37%	40%	70%	33%	22%
5.84	Have fun and laughter	10%	27%	31%	36%	37%	10%
5.79	Broaden my mind/ Stimulate my thinking	30%	41%	44%	44%	45%	27%
5.73	See world famous sites and places	49%	60%	63%	23%	29%	35%
5.72	Provides a wide range of holiday experiences	31%	43%	45%	49%	49%	28%
5.71	Enjoy local specialities (food and drink)	22%	52%	45%	32%	29%	30%
5.69	Experience activities/places with a wow factor	21%	41%	40%	51%	29%	20%
5.69	Be physically healthier	17%	23%	24%	49%	26%	21%
5.67	Enjoy peace & quiet	24%	19%	19%	63%	15%	13%
5.61	Experience things that are new to me	28%	41%	51%	48%	30%	38%
5.61	Feel connected to nature	15%	17%	21%	60%	34%	14%
5.61	It offers unique holiday experiences	31%	42%	47%	48%	34%	30%
5.60	Do what I want when I want spontaneously	23%	32%	33%	37%	32%	21%
5.59	Do something the children would really enjoy	24%	36%	33%	52%	48%	17%
5.56	Explore the place	18%	32%	41%	38%	33%	21%
5.56	The people are friendly and welcoming	22%	24%	21%	28%	23%	20%
5.51	Soak up the atmosphere	31%	46%	38%	45%	35%	15%
5.51	Have dedicated time with my other half	27%	46%	47%	56%	27%	23%
5.50	Visit a place with a lot of history/historic sites	44%	56%	63%	18%	18%	34%
5.46	Offers good value for money	28%	42%	41%	33%	39%	23%
5.46	A good place to visit at any time of year	18%	28%	28%	43%	36%	17%
5.35	Chill/ slow down to a different pace of life	12%	32%	30%	45%	24%	16%
5.30	Revisit places of nostalgic importance to me	30%	30%	35%	31%	30%	20%
5.25	Get some sun	15%	25%	34%	57%	35%	17%
5.24	Enjoy high quality food and drink (gourmet food)	13%	58%	53%	25%	29%	24%
5.23	Easy to get around by public transport	31%	30%	20%	17%	32%	27%
5.14	Visit places important to my family's history	23%	43%	38%	32%	31%	19%
5.12	Good shopping	30%	56%	53%	21%	49%	19%
5.12	Go somewhere that provided lots of laid on entertainment/nightlife	21%	35%	37%	41%	42%	25%
5.10	Get off the beaten track	15%	21%	20%	49%	26%	15%
5.03	Meet the locals	6%	32%	30%	28%	29%	10%
5.01	To participate in an active pastime or sport	24%	23%	16%	35%	39%	22%
4.98	Do something environmentally sustainable/ green	22%	25%	32%	63%	28%	42%
4.93	Feel special or spoilt	22%	45%	31%	23%	31%	12%
4.83	Meet and have fun with other tourists	17%	25%	14%	37%	49%	15%
4.76	Experience adrenalin filled adventures	19%	27%	26%	33%	59%	27%
4.64	Watch a sporting event	48%	23%	29%	26%	55%	33%
4.62	Party	42%	44%	40%	34%	61%	28%
4.54	Do something useful like volunteering to help on a project	36%	21%	25%	41%	38%	24%
4.08	Fashionable destination	18%	63%	65%	10%	27%	9%

Source: VisitBritain/Arkenford 2013



2.5 Perceptions of Britain

Motivations for choosing Britain as a holiday destination

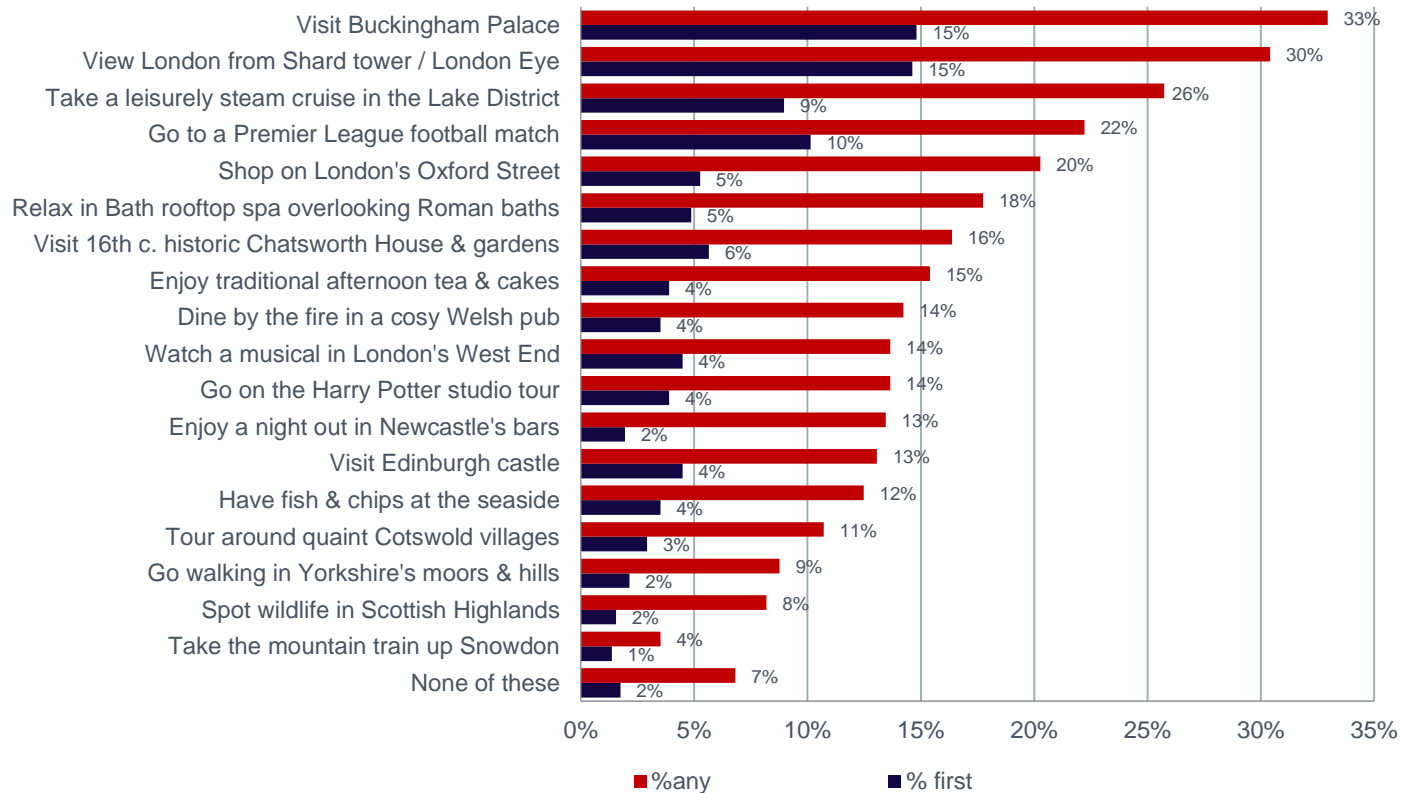


Source: VisitBritain/IPSOS 2016, base: visitors (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)



2.5 Perceptions of Britain

Sought-after Britain activities



Source: Anholt-GfK Nation Brands Index 2013; If you went on a holiday/vacation to Britain which of the following activities would you most like to do? Please choose a first, second and third choice



Chapter 3: Access and travel trade





3. Access and travel trade

- Many South Korean visitors arrive by Eurostar; 41% arrive via the tunnel, behind only France and Belgium. Many South Korean holiday visitors come to the UK include a visit to another country or more to their trip. South Korean nationals neither need a visa to visit the UK nor any countries in the Schengen area, which make a multi-trip through Europe easier for them, and might enhance their use of Eurostar.
- Nonetheless, in 2014-2016 over half of the visits to the UK from South Korea arrived by plane.
- Direct, non-stop seat capacity has increased by about half in the last ten years to 2017. 2012 marked a milestone in direct connectivity between the two countries with British Airways launching a new service on that route, and both Asiana Airlines and Korean Air getting an important uplift in capacity that same year.
- At the moment, all direct flights still link Seoul Incheon to London Heathrow, with local carriers still representing most of the direct, non-stopping seat capacity.
- The South Korean trade is quite fragmented with a growing FIT segment. Understanding the market and building relationships is key with the local trade.



Source: Apex Rdc 2016, International Passenger Survey by ONS



3.1 Access: key facts

- Over half of South Korean visitors arrive in the UK by plane. However, South Koreans also have a higher-than-average propensity to use the tunnel to get to Britain (41% in 2014-2016 compared to 13% for the all-market average).
- South Korean visitors to the UK are more likely than the all-market average to have visited another country on the same trip: in 2016 8% had visited another country before their UK visit, 15% after, and 17% both before and after (vs 4%, 4% and 5% respectively for the all-market average). It is worth noting that South Korean nationals do not need a visa to visit the UK, or the countries of the Schengen area, making a European multi-country trip easier for them to undertake.
- Seat capacity on direct, non-stopping flights from South Korea to the UK is concentrated on the Seoul Incheon-London Heathrow route. Three airlines operate this route: Korean Air, Asiana Airlines and British Airways. The latter only represented 1-in-4 available seats between the two capital cities in 2017.
- Direct seat capacity between South Korea and the UK has consolidated its growth following a big increase in 2012, and in total increased 47% between 2007 and 2017.

Source: International Passenger Survey by ONS, Apex RdC (stopping flights only)

◀ **4-in-10 South Korean visitors come to the UK with the Eurostar.**

Access to Britain

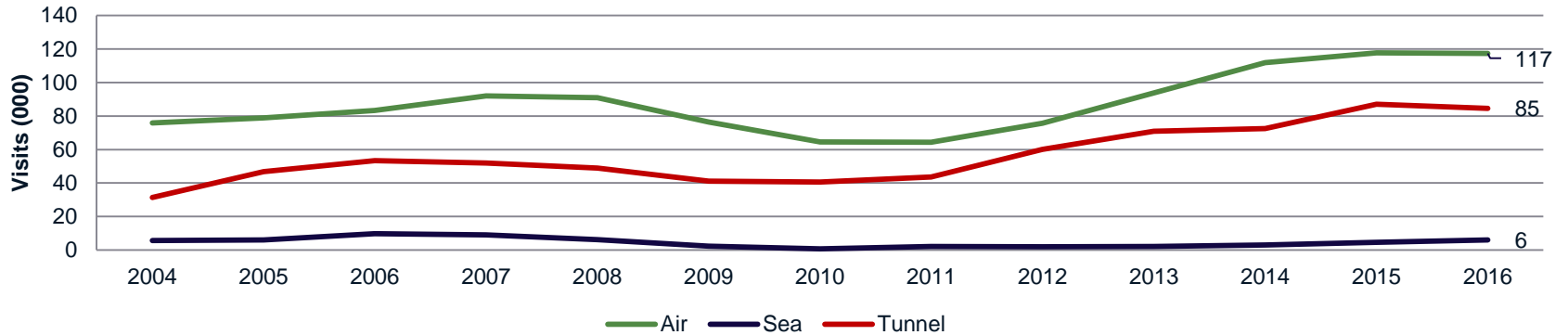
Measure	2017
Weekly aircraft departures	21
Weekly aircraft seat capacity	5,845
Airports with direct routes in South Korea	1
Airports with direct routes in Britain	1



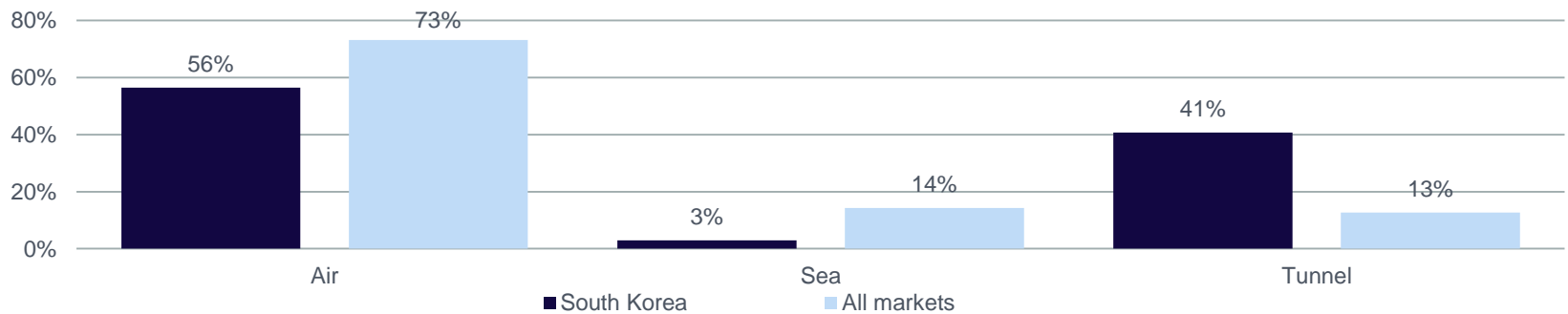
3.1 Access: mode of transport

Visits by mode of transport

(average visits in 000s on rolling 3 years ending in):



Annual share by mode (2014-2016):

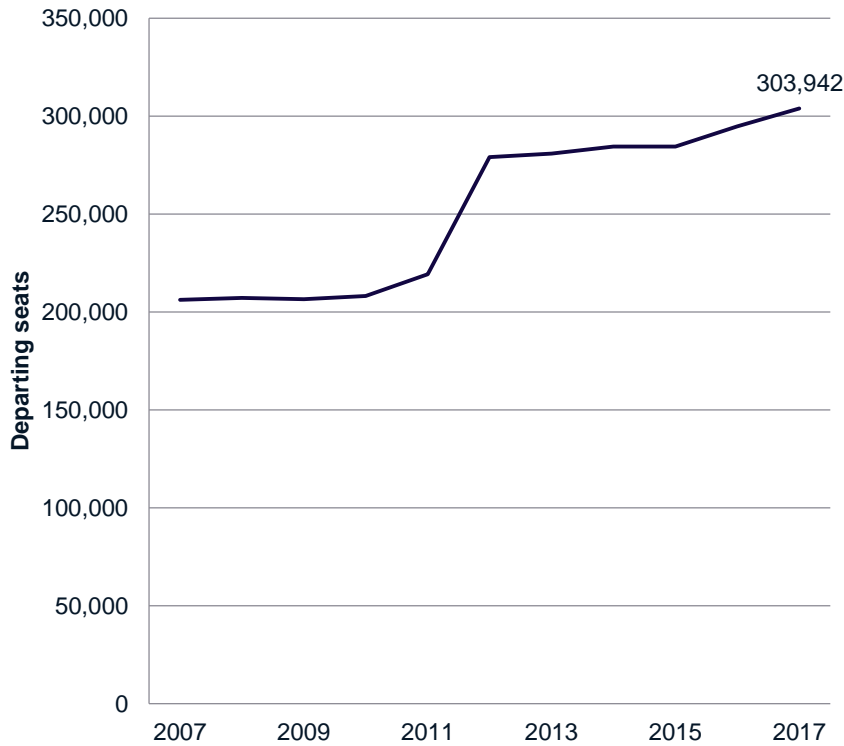


Source: International Passenger Survey by ONS



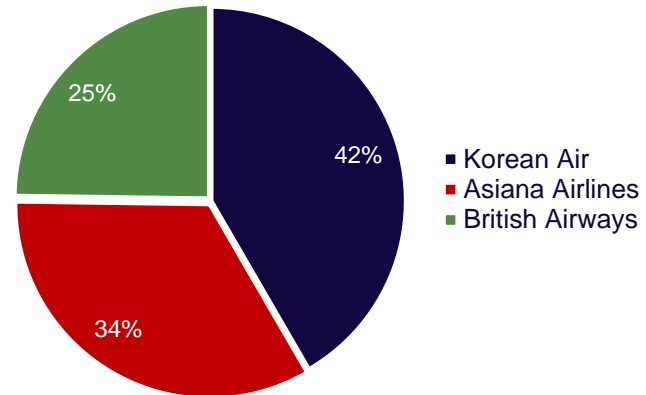
3.1 Access: capacity

Annual airline seat capacity trends on direct, stopping flights



Source: Apex Rdc: includes direct, non-stopping flights only

Airline seat capacity by carrier (2017)





3.2 Travel trade: general overview

- The trade is quite fragmented in South Korea, but two main wholesalers dominate the sector.
- Understanding the Korean culture and building lasting relationships are key to succeed in this market.
- The Free Independent Travel (FIT) segment is becoming more important. One of the main wholesalers has diversified, creating a FIT branch to specially target this segment.
- South Korean travellers are becoming more savvy in terms of looking for the different elements of their trip online and at their traditional travel agents or direct with the company providing the service they are looking for. Therefore a wide range of intermediaries can be used.
- Understanding the Korean culture and building lasting relationships are key to succeed in this market.





3.2 Travel trade structure

Top wholesalers In South Korea

Hanatour

Modetour

Other key players offering wholesaler services to retail agents

Interpark

Lotte Tour, Lotte Holidays

Hanjin

Very Good Tour

Yellow Balloon

Overview

- The South Korean travel industry is largely supported by domestic demand. However, overseas travel has grown rapidly.
- Main international travel prospects include:
 - Free and independent travellers (FIT)
 - Group package tours
 - Family vacation packages
 - Cultural tours and scenic/nature tour packages
 - Luxury packages catering to Korean single, professional women travelling for leisure
 - Outdoor activities
 - Educational travel
 - MICE
- South Koreans are quite savvy when it comes to planning and booking overseas holidays: they will use a mix of both online services and brick-and-mortar travel agents. This results in a complex, quite fragmented, and fast-changing travel trade landscape in this market.

Wholesalers

- There are two main players in travel wholesale in South Korea: Hanatour and Modetour. They would sell their products to both independent retail agents and their franchisees. They both count over 2,000 franchisees throughout the country.
- The main difference between the two is their strategy: Hanatour developed a FIT brand 'HanaFree', increasing its presence on that segment, while Modetour remains mainly present in package tours. The latter has to face more competition from other similar players, but also discount package tour operators, such as Very Good Tour or Yellow Balloon.



3.2 Travel trade structure

Some top retail agencies

Freedom Tour
Hanjin
KRT
Lotte Holidays (ex LotteJTB)
Lotte Tour
Tour 2000
Very Good Tour
Yellow Balloon

Top active FIT agents

HanaFree
Naeil Tour
Interpark
Blue Travel
IOS
Seygero
Webtour

Retailers

- South Korean travellers are more and more focusing on price when they book their overseas trip through a travel agent, or as a group tour. Very Good Tour and Yellow Balloon have seen the most important growth rates in the last few years as a consequence.
- In parallel the FIT segment continue to grow and so FIT agents are becoming more and more important when it comes to dealing with the South Korean travel trade.
- Some of those will look for ranges of products in Britain that relate to specific interests, with culture and shopping being the most popular. However, there is room to promote the British landscapes and natural sites, as well as food products: the market is usually interested in those types of travel offer but would know little about what Britain can offer them.



3.2 Travel trade: doing business

- **Time difference:** GMT +9 (summer time+8)
- **Business hours:** usually from 9:00 to 18:00 for offices and organisations.
- **Where to find the trade:** most South Korean leading travel agents and tour operators are concentrated in Seoul.
- **Tips for doing business:** South Korean is among the hardest working nations, and so it is important to respect their working etiquette. It is best to be introduced by a third party when meeting a South Korean business person for the first time. The exchange of business cards is key: use both hands to present yours and receive one. Titles are extremely important: they should not be omitted, and even roles should be made clear since the beginning. Also remember that contracts are often seen as a conversation starting point more than an aim to achieve.
- **Business meeting etiquette:** An appointment should be made a few weeks in advance of a business meeting. They usually take place just before lunch or at the beginning of the afternoon. Punctuality is very important as schedules are usually very busy. However, be aware that last-minute cancellations happen quite often. Modesty, humility and respect are the key aspect of the Korean culture one has to play by in business there. Building long-term relationships is key for that market.
- **Gifts:** presenting gifts at formal meetings is customary – gift exchange is important and should be dealt with similarly to business card exchange. Same-value gifts should be exchanged, with the highest-value for the most senior person. Gifts should be received with both hands.
- **Business meal:** If you are planning to have a lunch meeting, restaurants in South Korea are usually busy and it is recommended to make a booking, or plan to get your lunch before 12pm, or after 1pm.
- **Language:** South Koreans may avoid directly saying “no”, and tend to prefer saying something may be difficult instead. Doing the same might be appreciated. Similarly the South Korean ‘yes’ may be closer to ‘I understand’ or ‘if possible, I will do it’. It is important to decipher those correctly when negotiating in that market. Bringing brochures or other communication supports can also help avoiding potential misunderstanding, and so is sending written notes of what was discussed at the meeting.
- **Trade exhibitions:** There is only one international travel fair in Korea: the KOFTA World Travel Fair. International official tourism agencies will usually attend. In 2018 it will be held on 14th-17th June, at the COEX Convention Center in Seoul. In May 2018 the PATA Annual Summit will also take place in Gangneung, South Korea (17th-20th). HanaTour International Travel Show will also take place in Seoul in June 2018 (7th-10th).

Source: www.export.gov, www.korea4expats.com, www.miceandtourismaroundtheworld.com



3.2 Travel trade: South Korean holidays

National public holidays in 2018 and 2019

(Variations may occur on a state by state basis)

Date in 2018	Date in 2019	National Holiday
1 st January		New Year's Day
15 th -17 th February	5 th -8 th February	Korean (Lunar) New Year (3 days consecutively, usually in early February)
1 st March		March 1 st Movement
7 th May	5 th May	Children's Day
22 nd May	13 th May	Buddha's Birthday (usually in late May)
6 th June		Memorial Day
15 th August		Liberation Day
23 rd -26 th September	12 th -14 th September	Harvest Moon Festival Holiday/ Chuseok
3 rd October		National Foundation Day
9 th October		Hangeul Day (Korean alphabet day)
25 th December		Christmas Day

Source: www.officeholidays.com, The Chosunilbo, Bloomberg, smartexpat.com

- There are 16 official national holidays a year in general, mainly because of celebrations based on both the Solar and Lunar calendars as South Korea uses both.
- Another holiday is observed by most businesses: Labour Day, on 1st May, although it is not an official day off.
- This came just after the president granting an extra day off nationwide, on 2nd October 2017, extending the Chuseok holiday onto National Foundation Day, to 10 days in total.
- Working hours were also recently reviewed from 68 hours a week maximum to 52 hours, based on a 40-hour week with the possibility for 12 extra hours.
- Full-time workers are entitled to 15 days of paid annual leave a year as a minimum, provided they attended at least 80% of their work days the year before. However, South Koreans used not to take all those days off. The trend is shifting slowly with young people starting to take more short breaks away, and people also trying longer vacation periods, allowing them to explore further destinations better.
- The South Korean academic year is split into two terms: from March to mid-July, and from end of August to mid-February. Schools also organise a 2-week break for Spring and then shorter breaks for Chuseok and Seolnal (late December).



3.3 Caring for the consumer

Understanding the culture

- Kibun, nunchi, inwha, and Harmony are key pillars of the South Korean culture.
- Personal relationships are extremely important in the South Korean culture, in the personal sphere as much as in the business environment. As everyone strives to be their best, relationships are harmonious and understanding. For the trade it translates as South Korean travellers expecting people to offer them their best service; saying no to a request is not acceptable unless it is presented in a friendly manner, explaining why it cannot be granted.
- Kibun and nunchi: South Koreans do not like to lose face, and it is hard for them to admit failure. Directness is always poorly received because of this. And so you may need to communicate with the 'kibun' concept in mind – Korean pride or state of mind.
- Finally, regardless of their religion, most South Koreans practice Confucianism. Deriving from its beliefs, 'inhwa' defines the Korean approach to harmony through social consensus. In the business environment or commercial relationships, it translates in a formal behaviour, as well as being loyal to business partners.

Hospitality

- Meal times tend to be similar to those in Britain.
- A typical South Korean dish is likely to contain rice.
- South Korean cuisine is renowned internationally. Popular dishes such as a bibimbap or a Korean barbecue can easily be found in the main cities in Britain. However, South Korean international travellers are usually curious about the culture of their destination and this could translate into sampling the local cuisine.
- Some travellers from this market are foodies, who would actively look for local experiences related to food.
- Many women travelling alone would look for more premium dining options. They would also prefer accommodation with spa facilities, or in the city centre, in a quiet area close to nice restaurants and the shopping streets they want to visit. Comfort, ease of getting around and security are their key criteria.

Source: www.korea4expats.com, CIA's 2017 World Factbook on South Korea



3.3 Caring for the consumer

Language

- Korean is the official language.
- English is largely used for business and widely spoken as it is taught at school. However, not every South Korean would have the opportunity to use it, and so sometimes conversational English remains quite difficult to understand.
- Using some Korean will be appreciated, or at least talking a bit more slowly. To ensure that what you explained is understood, repeating key points can also help South Koreans to better get them.

Language basics

English	South Korean	Pronunciation
Please	부디	Budi
Thank you	고맙습니다	Gomabseubnida
Yes	예	Ye
No	아니	Ani
I'm sorry	죄송 해요	Joesong haeyo
Excuse me	실례합니다	Sillyehabnida
Sorry, I don't speak Korean.	미안, 나는 한국어를 못해.	Mian, naneun hangug-eoleul moshae.



3.3 Caring for the consumer: South Korean language tips

Language tips for arrival and departure

English	South Korean	Pronunciation
Hello!	여보!	Yeobo!
My name is...	내 이름은...	ileum-eun...
Welcome to Britain	영국에 오신 것을 환영합니다.	Yeong-gug-e osin geos-eul hwan-yeonghabnida.
Pleased to meet you!	만나서 반갑습니다!	Mannaseo bangabseubnida!
How are you?	잘 지냈어요?	Jal jinaess-eoyo?
Enjoy your visit!	당신의 방문을 즐기십시오!	Dangsin-ui bangmun-eul jeulgisibsio!
Goodbye	안녕	Annyeong
Did you enjoy your visit?	당신은 당신의 방문을 즐겼습니까?	Dangsin-eun dangsin-ui bangmun-eul jeulgyeosseubnikka?
Have a safe journey home!	집으로 안전하게 여행하십시오!	Jib-eulo anjeonhage yeohaenghasibsio!
Hope to see you again soon!	조만간 다시 보길 바랍니다!	Jomangan dasi bogil balabnida!



3.4 Working with VisitBritain

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or hosting our journalists and broadcast crew
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Print advertising in targeted media/Britain supplements
- Retailing your product through the VisitBritain shop
- Or as a major campaign partner

We are here to support you and look forward to working with you.

To find out more browse our opportunity search (visitbritain.org/opportunities) or trade website (trade.visitbritain.com) or contact the B2B events team (Email: events@visitbritain.org) or campaign partnerships team (Email: partnerships@visitbritain.org) or trade support team (Email: tradesupport@visitbritain.org)



3.5 Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS (visitbritain.org/latest-monthly-data visitbritain.org/latest-quarterly-data-uk-overall visitbritain.org/latest-quarterly-data-area)
- Inbound Tourism Trends by Market visitbritain.org/inbound-tourism-trends
- Sector-specific research visitbritain.org/sector-specific-research
- 2018 Inbound Tourism Forecast visitbritain.org/forecast
- Britain's competitiveness visitbritain.org/britains-competitiveness

We are here to support you and look forward to working with you.

To find out more about the South Korean or other inbound markets browse our markets & segments pages or (visitbritain.org/markets-segments) our inbound research & insights or (visitbritain.org/inbound-research-insights) contact us directly (Email: research@visitbritain.org)



3.5 Useful market-specific research resources

We have dedicated research and insights available which includes:

- Planning, decision-making and booking cycle of international leisure visitors to Britain
<https://www.visitbritain.org/understanding-international-visitors>
- Technology and social media
<https://www.visitbritain.org/understanding-international-visitors>
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more
[visitbritain.org/visitor-characteristics-and-behaviour](https://www.visitbritain.org/visitor-characteristics-and-behaviour)

We are here to support you and look forward to working with you.

To find out more about the South Korean or other inbound markets browse our markets & segments pages or ([visitbritain.org/markets-segments](https://www.visitbritain.org/markets-segments)) our inbound research & insights or ([visitbritain.org/inbound-research-insights](https://www.visitbritain.org/inbound-research-insights)) contact us directly (Email: research@visitbritain.org)



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