



Vision Insights

South Korea Traveler Profiles

2024

January 24, 2025



STATE OF HAWAII • DEPARTMENT OF BUSINESS,
ECONOMIC DEVELOPMENT & TOURISM



AUTHORITY

Vision Insights Syndicated Survey

- DBEDT subscribes to Vision Insight's Brand Health and Profiles databases for the U.S., Canada, South Korea, Australia, and Korea
- Consumers are surveyed each day
- DBEDT receives access to new data each week for selected traveler profile segments for the U.S., Canada, South Korea, Australia, and Korea

South Korea - Segment Definitions

Avid Traveler 90M+ Won

- Gross household income is 90M+ won
- Age is 25-54
- Either took an international vacation or very likely/likely to book a flight in the next 12 months

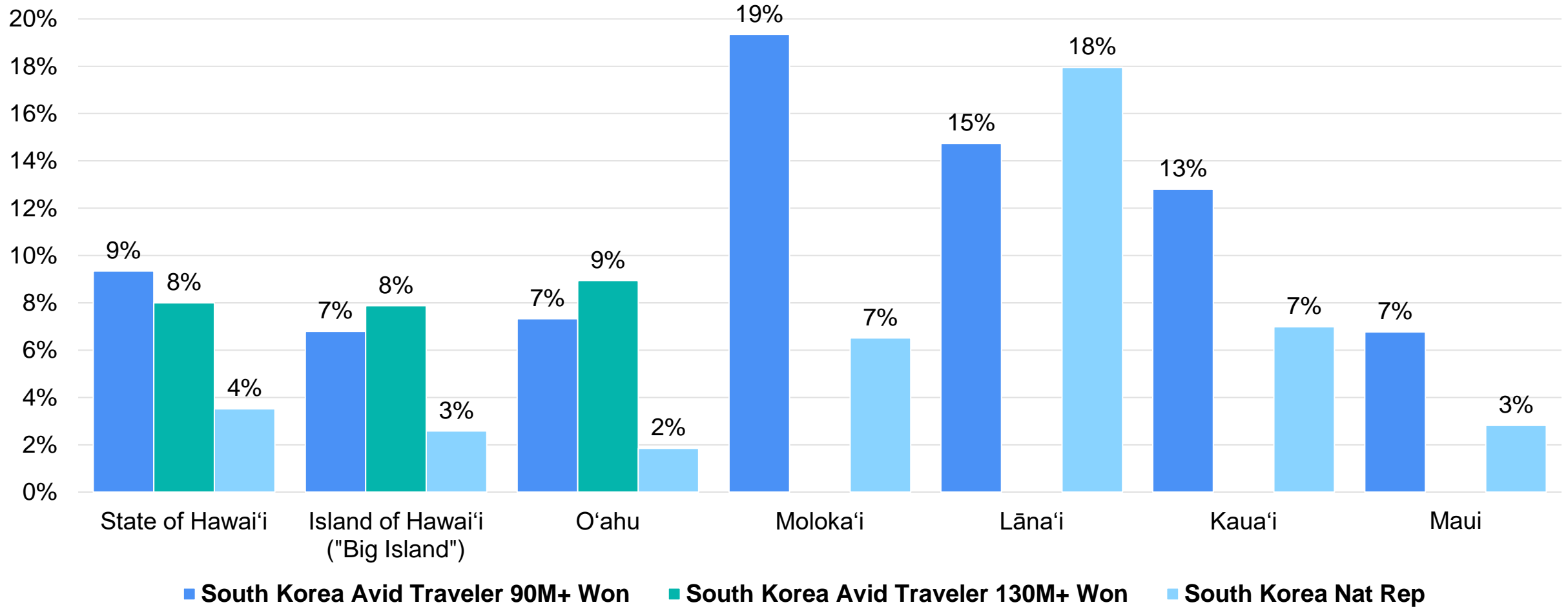
Avid Traveler 130M+ Won

- Gross household income is 130M+ won
- Age is 25-54
- Either took an international vacation, very likely/likely to book a flight in the next 12 months, or visited any of the Hawaiian Islands in the past two years

Nationally Representative Sample (Nat Rep)

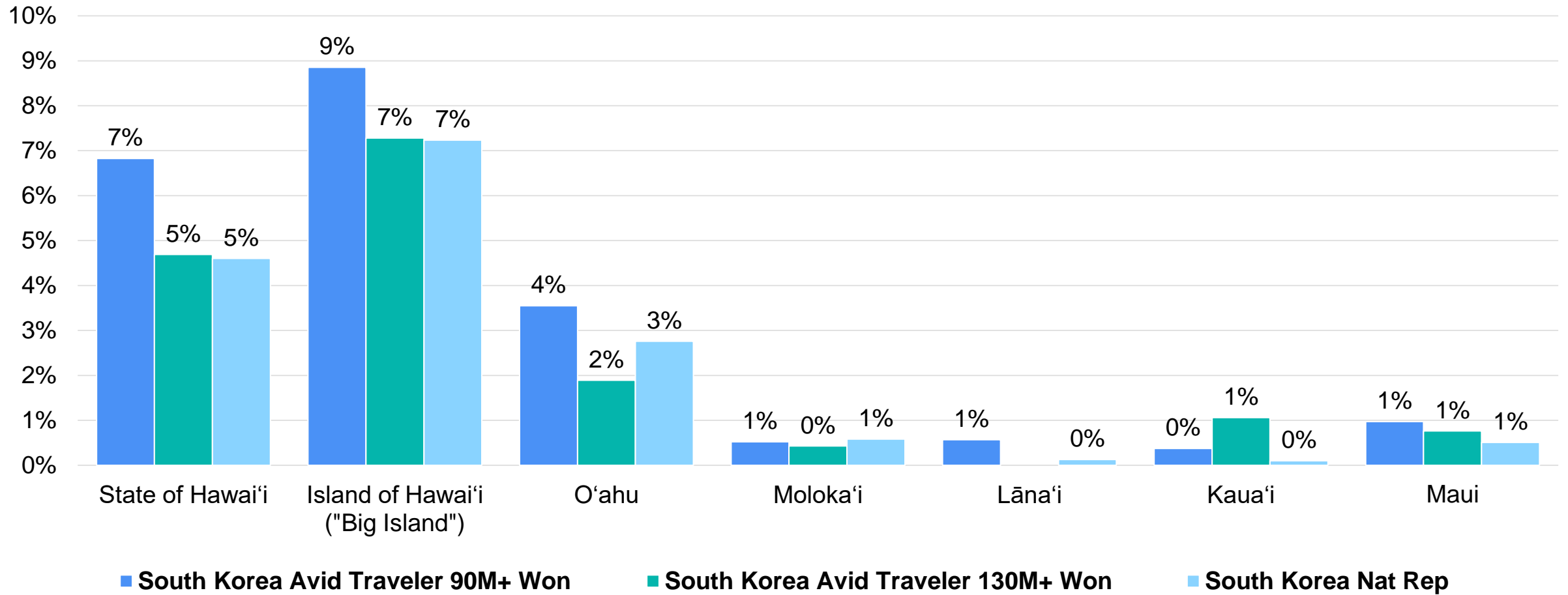
- Representative of South Korea adults in terms of age, gender, social class and education

South Korea - Leisure Trip in Past 12 Months



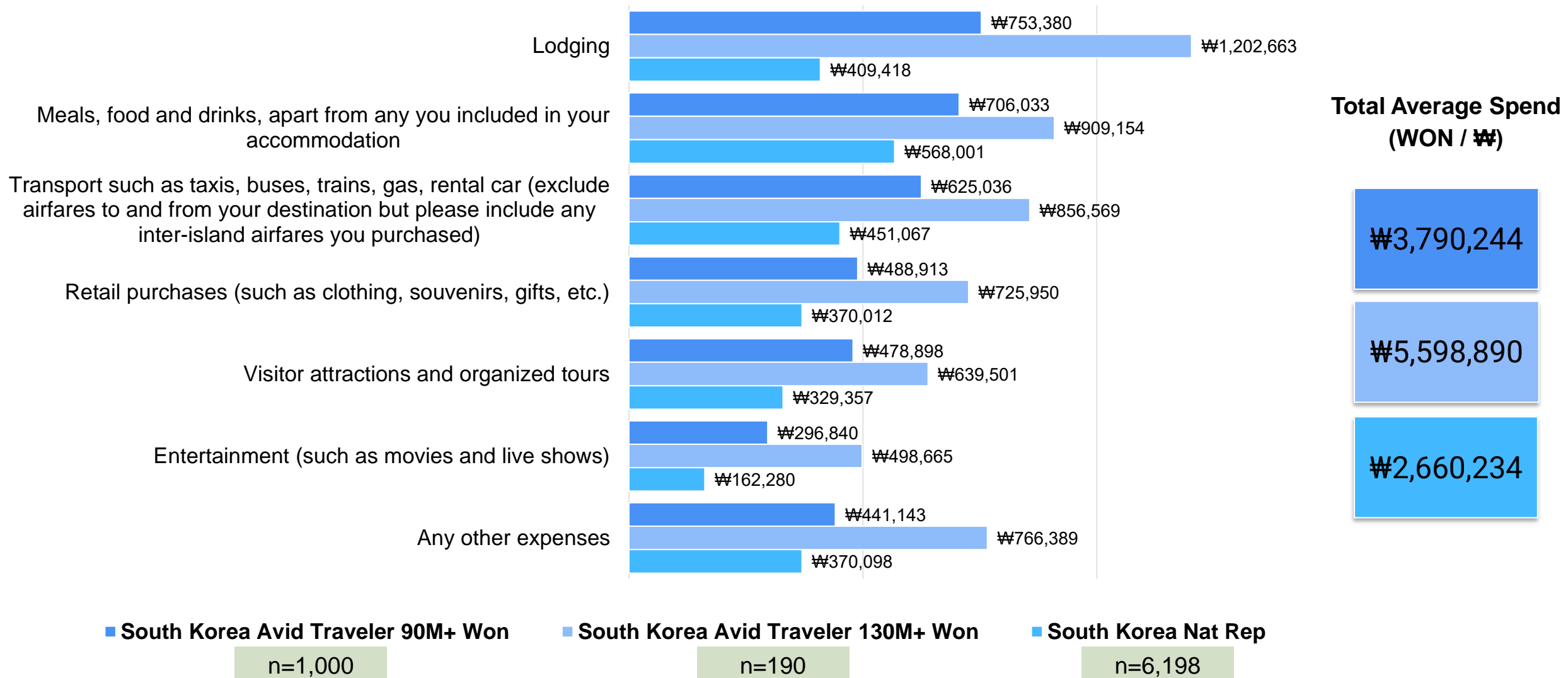
Sample Min. n=50

South Korea - Next Destination for Leisure Trip



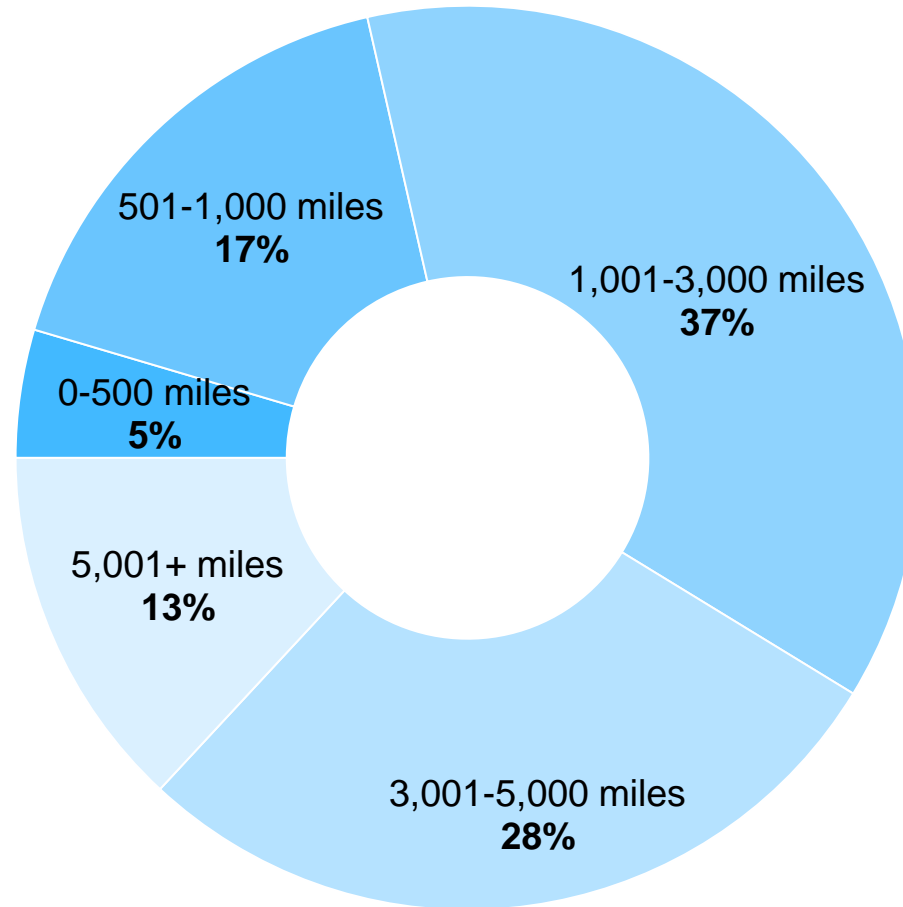
Sample Min. n=50

South Korea - Total Annual Holiday Spend



South Korea Avid Travelers 90M+ Won: Annual Vacation

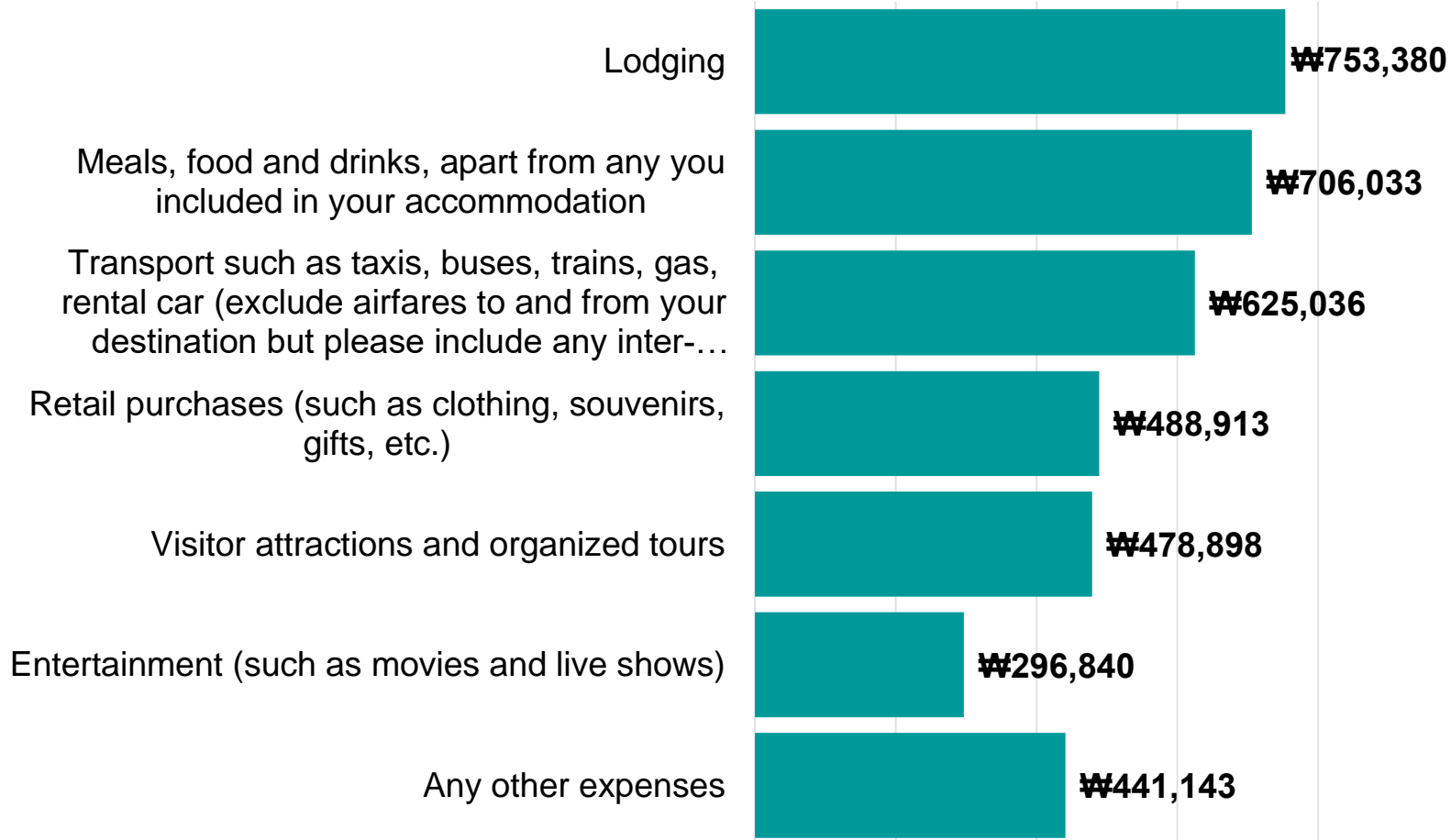
Distance Travelled on Annual Vacation



Sample Size: n=1,000

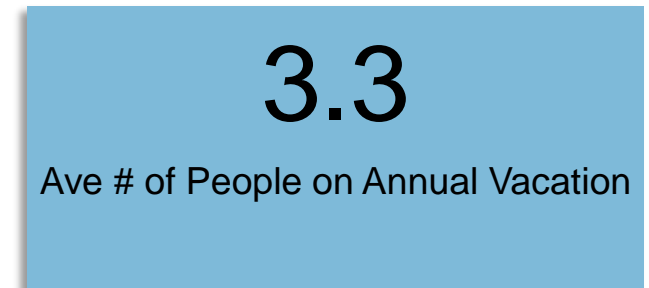
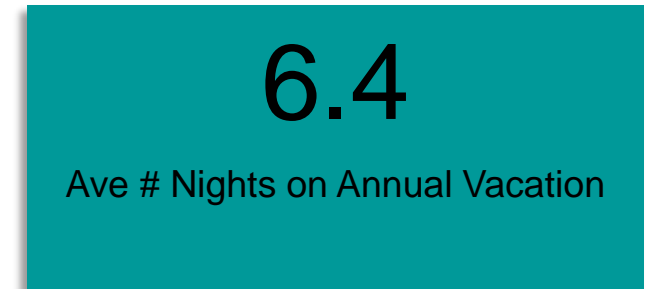
South Korea Avid Travelers 90M+ Won: Annual Vacation

Average Spend



Sample Size: n=1,000

Spend Per Person Per Day

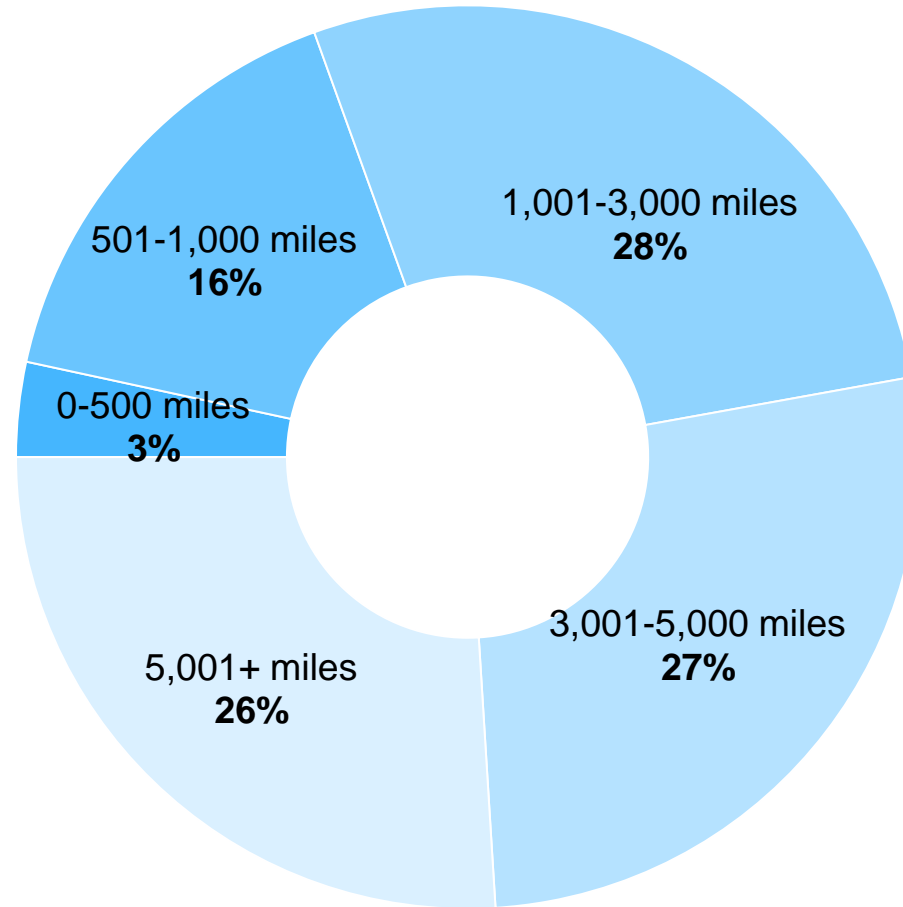


₩178,763

Ave. Per Person Per Day Spend

South Korea Avid Travelers 130M+ Won: Annual Vacation

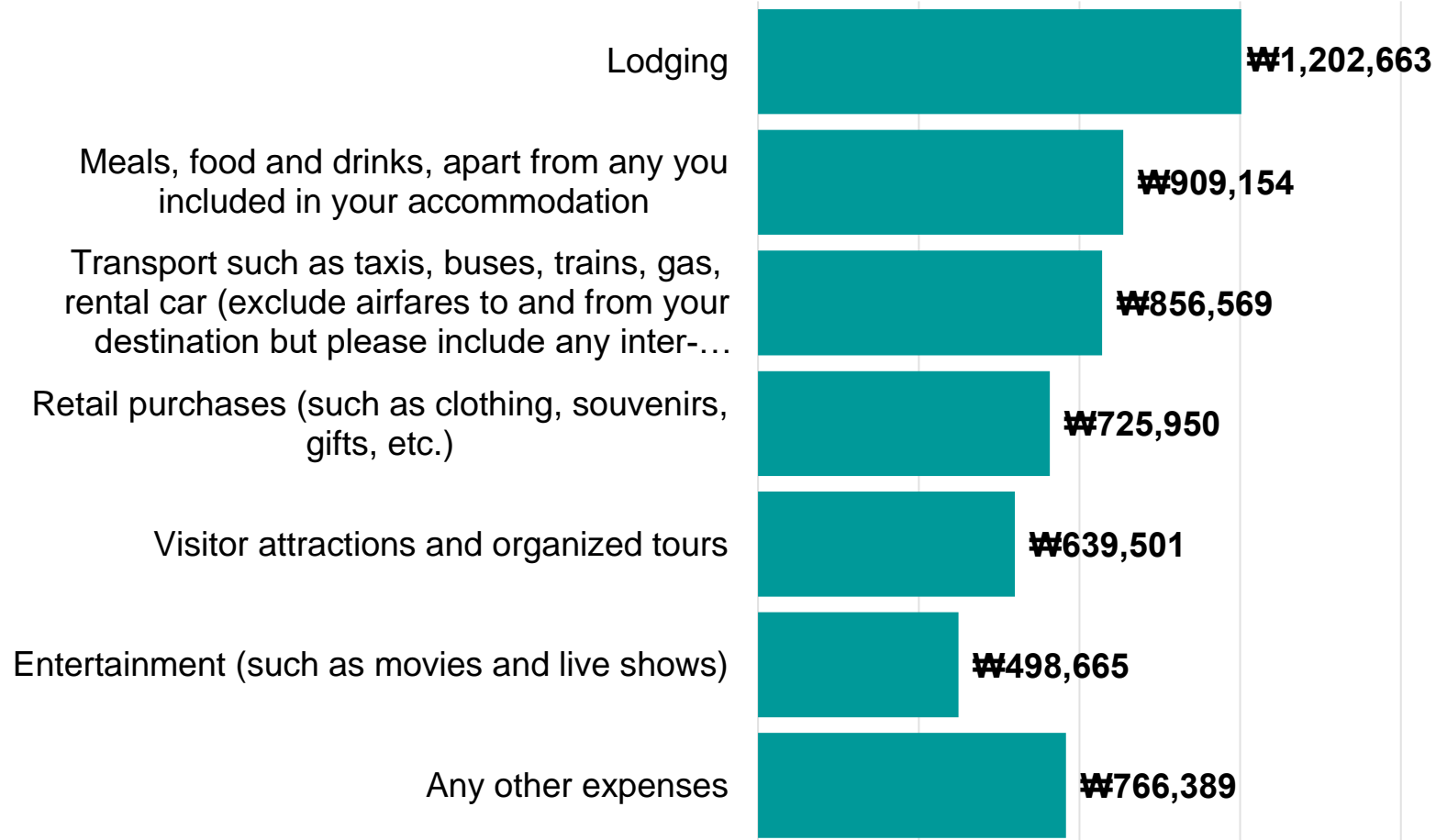
Distance Travelled on Annual Vacation



Sample Size: n=190

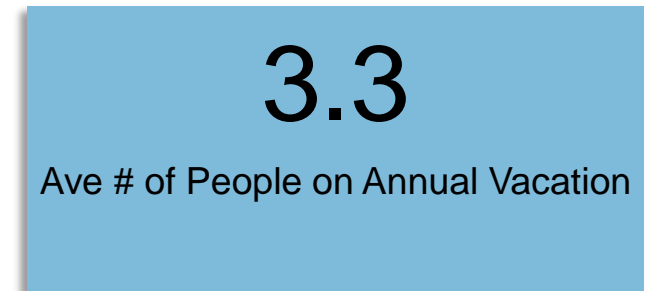
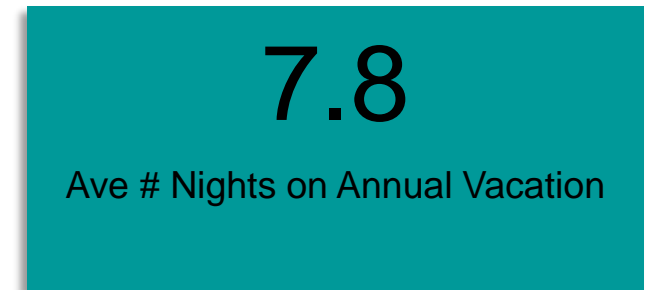
South Korea Avid Travelers 130M+ Won: Annual Vacation

Average Spend



Sample Size: n=190

Spend Per Person Per Day

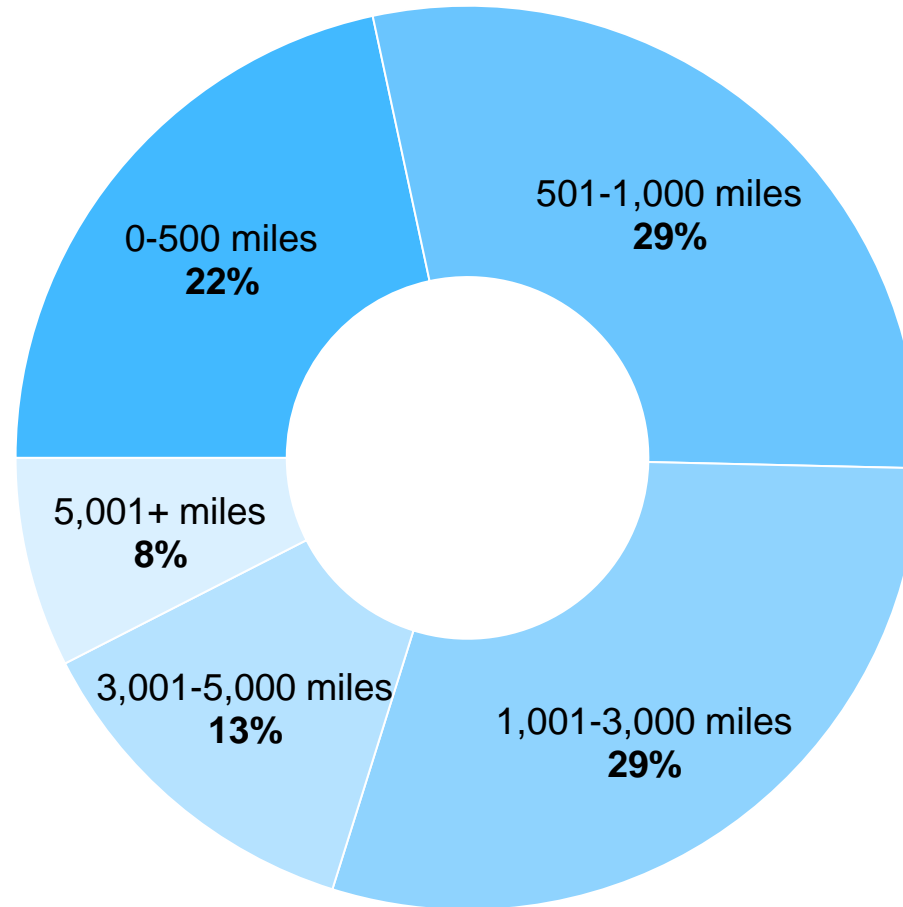


₩217,413

Ave. Per Person Per Day Spend

South Korea Nat Rep: Annual Vacation

Distance Travelled on Annual Vacation



Sample Size: n=6,198

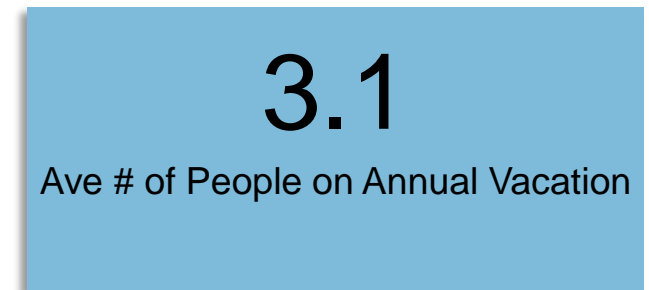
South Korea Nat Rep: Annual Vacation

Average Spend



Sample Size: n=6,198

Spend Per Person Per Day



₩163,496

Ave. Per Person Per Day Spend

South Korea - Importance of Travel Factors

	Very Important 5		
	South Korea: Avid Traveler 90M+ Won	South Korea: Avid Traveler 130M+ Won	South Korea Market
Value for money	35%	31%	46%
Comfort and accessibility	38%	40%	43%
Natural attractions/activities	28%	32%	30%
Family friendly locations and activities	32%	38%	29%
Opportunity to experience local restaurants/businesses	27%	31%	24%
Cultural attractions	30%	30%	27%
Entertainment and nightlife	20%	22%	15%
Consideration of sustainable principles	20%	21%	19%
Safe and secure destination*	51%	56%	59%

Sample Size:

n=1,000

*n=812

n=190

*n=152

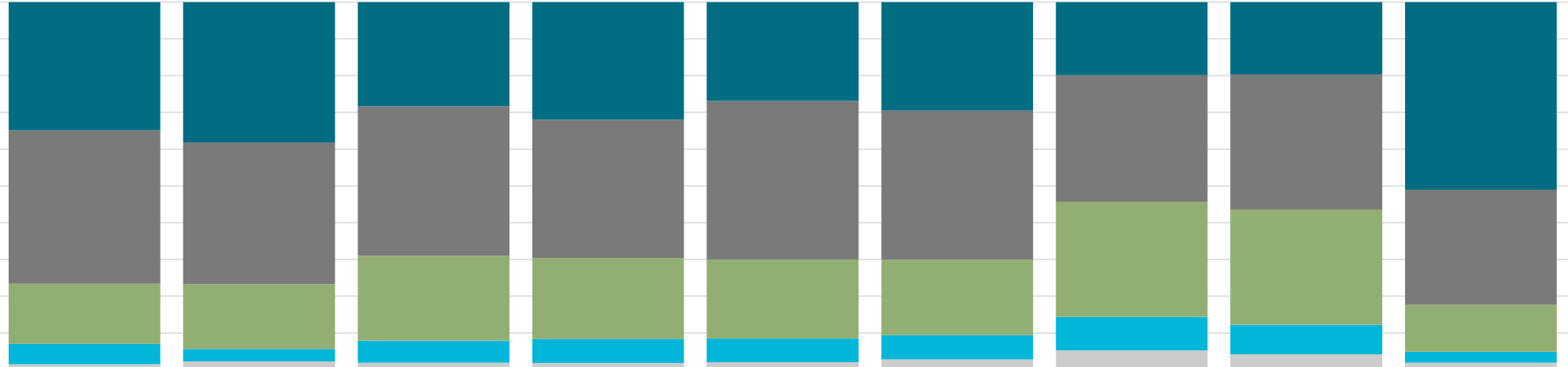
N=6,198

*n=5,151

How important are the following factors in choosing your travel destination. Please rate the following list with 1 = not very important and 5 = very important?

*Because this travel factor was added in March 2024, the sample size of each segment for this particular travel factor is smaller than those of the other travel factors.

South Korea Avid Travelers 90M+ Won: Importance of Travel Factors



	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination*
Very Important 5	35%	38%	28%	32%	27%	30%	20%	20%	51%
4	42%	39%	41%	38%	43%	41%	34%	37%	31%
3	16%	18%	23%	22%	21%	20%	31%	31%	13%
2	5%	3%	6%	7%	7%	7%	9%	8%	3%
Not very Important 1	2%	2%	2%	2%	2%	3%	5%	4%	2%

Not very Important 1
 2
 3
 4
 Very Important 5

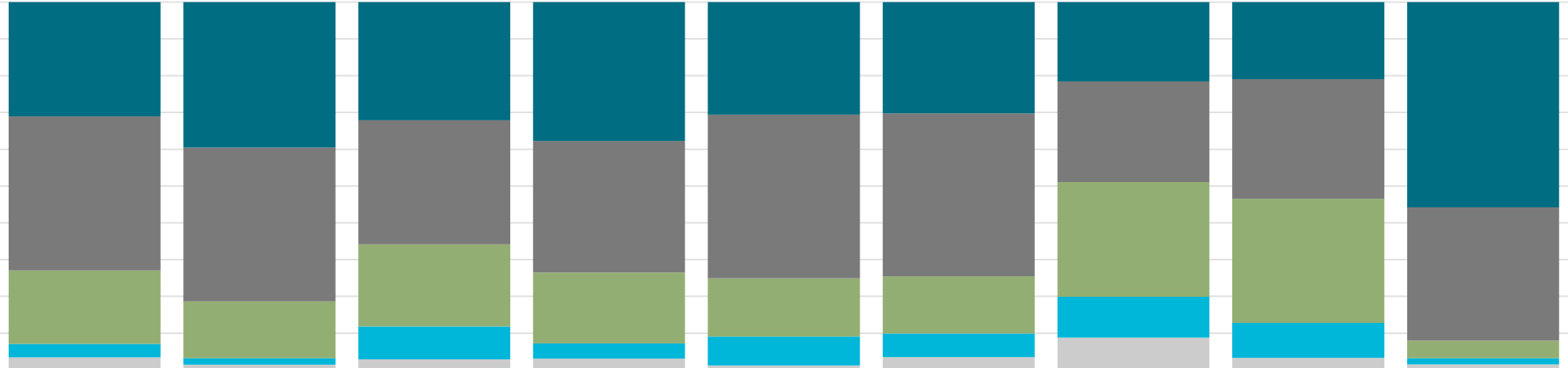
Sample Size: n=1,000

*n=812

How important are the following factors in choosing your travel destination? Please rate the following list with 1 = not very important and 5 = Very important | Which activities would you participate in if you take a trip to Hawaii?

*Because this travel factor was added in March 2024, the sample size of each segment for this particular travel factor is smaller than those of the other travel factors.

South Korea Avid Travelers 130M+ Won: Importance of Travel Factors



	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination*
Very Important 5	31%	40%	32%	38%	31%	30%	22%	21%	56%
4	42%	42%	34%	36%	45%	44%	27%	33%	36%
3	20%	15%	22%	19%	16%	16%	31%	34%	5%
2	4%	2%	9%	4%	8%	6%	11%	9%	2%
Not very Important 1	3%	1%	3%	3%	1%	3%	9%	3%	2%

Not very Important 1
 2
 3
 4
 Very Important 5

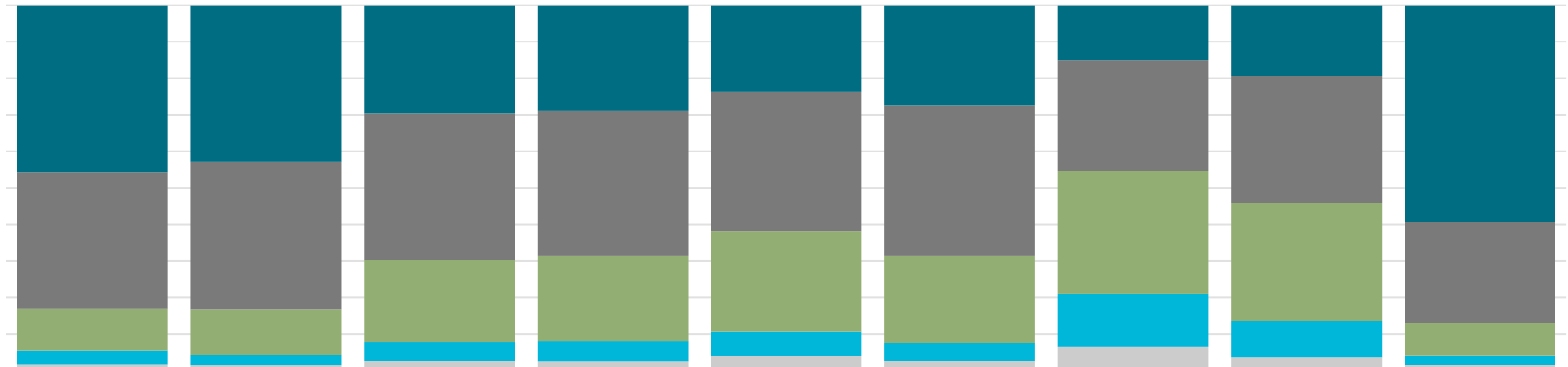
Sample Size: n=190

*n=152

How important are the following factors in choosing your travel destination? Please rate the following list with 1 = not very important and 5 = Very important | Which activities would you participate in if you take a trip to Hawaii?

*Because this travel factor was added in March 2024, the sample size of each segment for this particular travel factor is smaller than those of the other travel factors.

South Korea Nat Rep: Importance of Travel Factors



	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination*
Very Important 5	46%	43%	30%	29%	24%	27%	15%	19%	59%
4	37%	40%	40%	40%	38%	41%	30%	35%	28%
3	12%	13%	22%	23%	27%	24%	34%	32%	9%
2	4%	3%	5%	6%	7%	5%	14%	10%	3%
Not very Important 1	2%	1%	3%	2%	4%	3%	7%	4%	1%

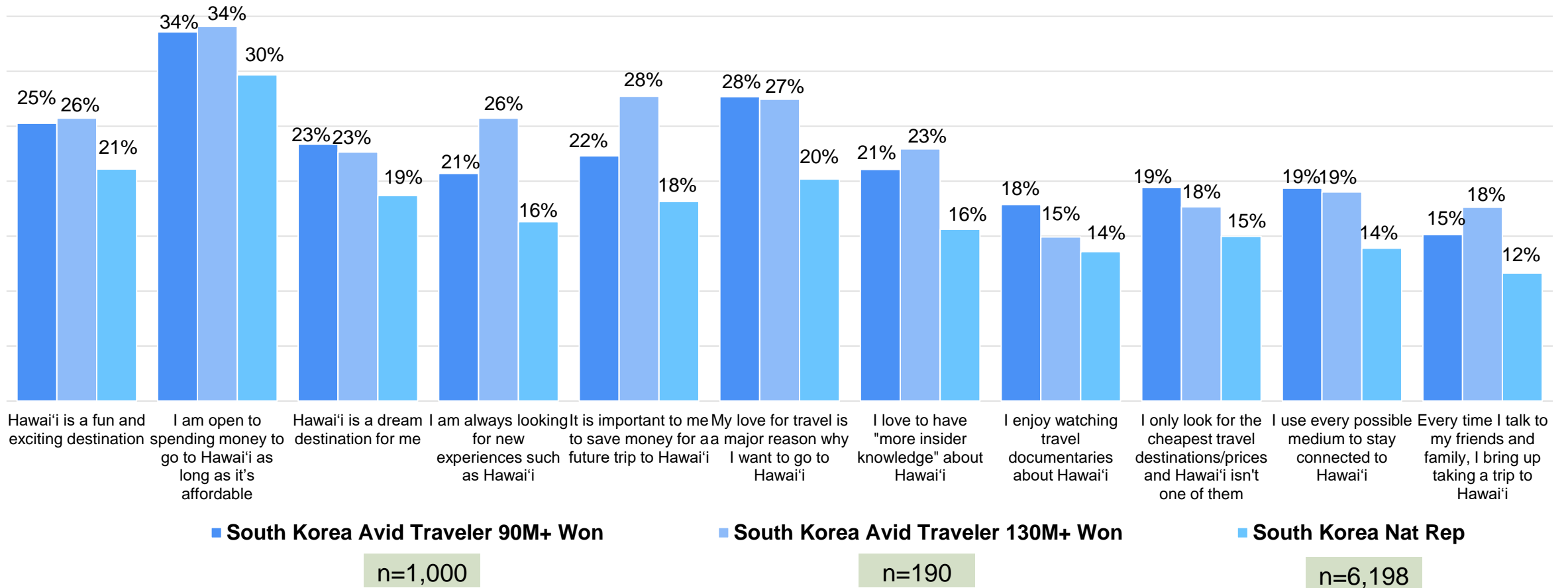
■ Not very Important 1 ■ 2 ■ 3 ■ 4 ■ Very Important 5

Sample Size: n=6,198

*n=5,151

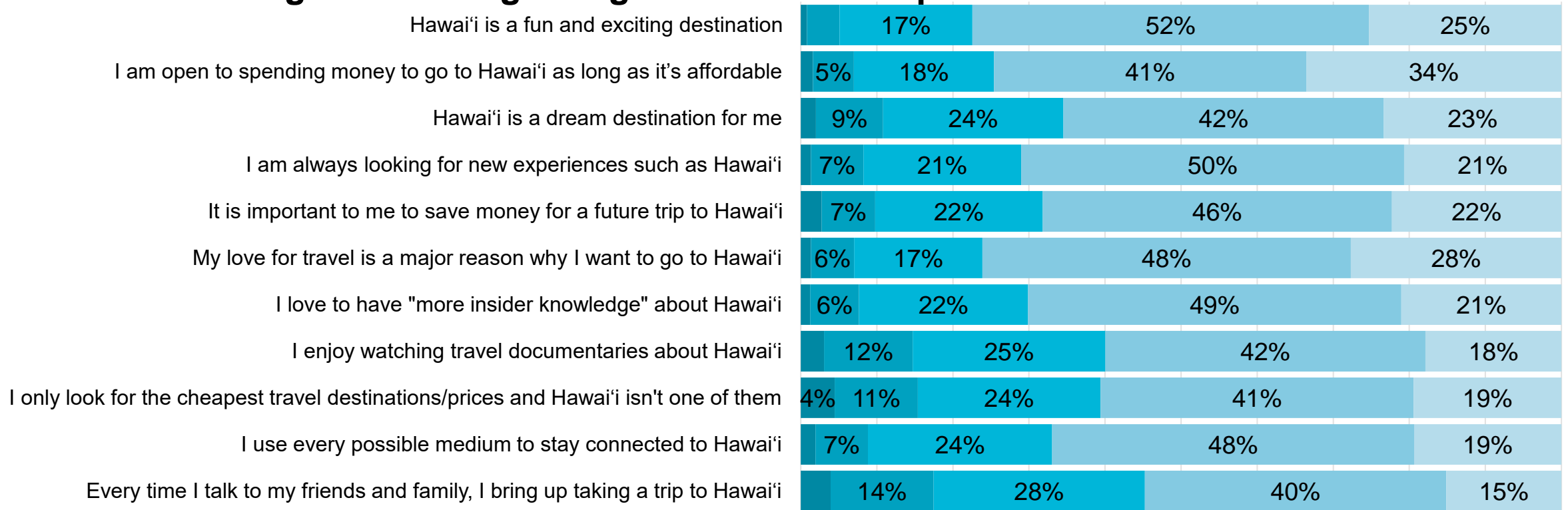
South Korea - Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as a Travel Destination (Strongly Agree)



South Korea Avid Travelers 90M+ Won: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

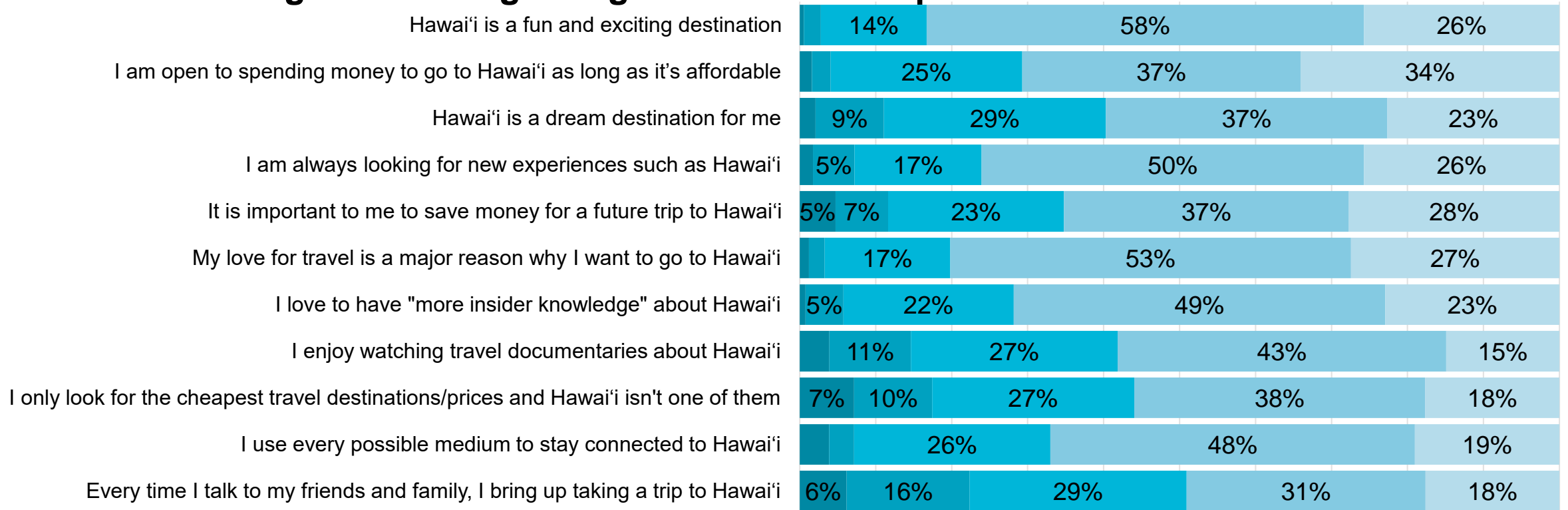


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,000

South Korea Avid Travelers 130M+ Won: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

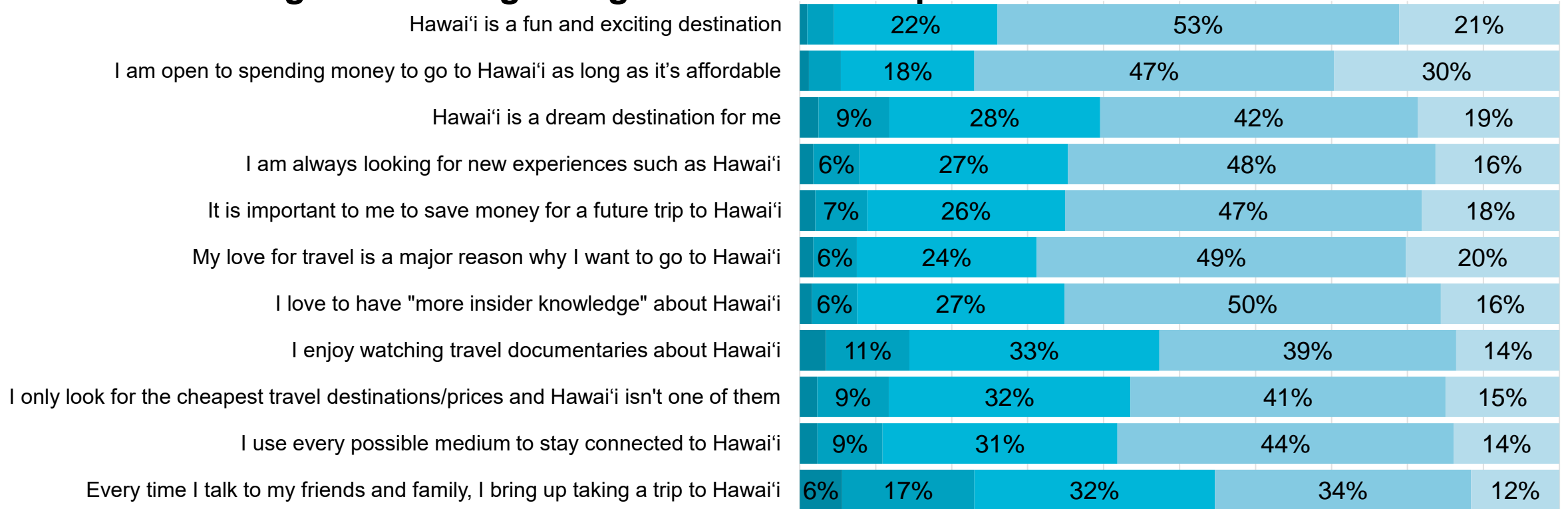


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=190

South Korea Nat Rep: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

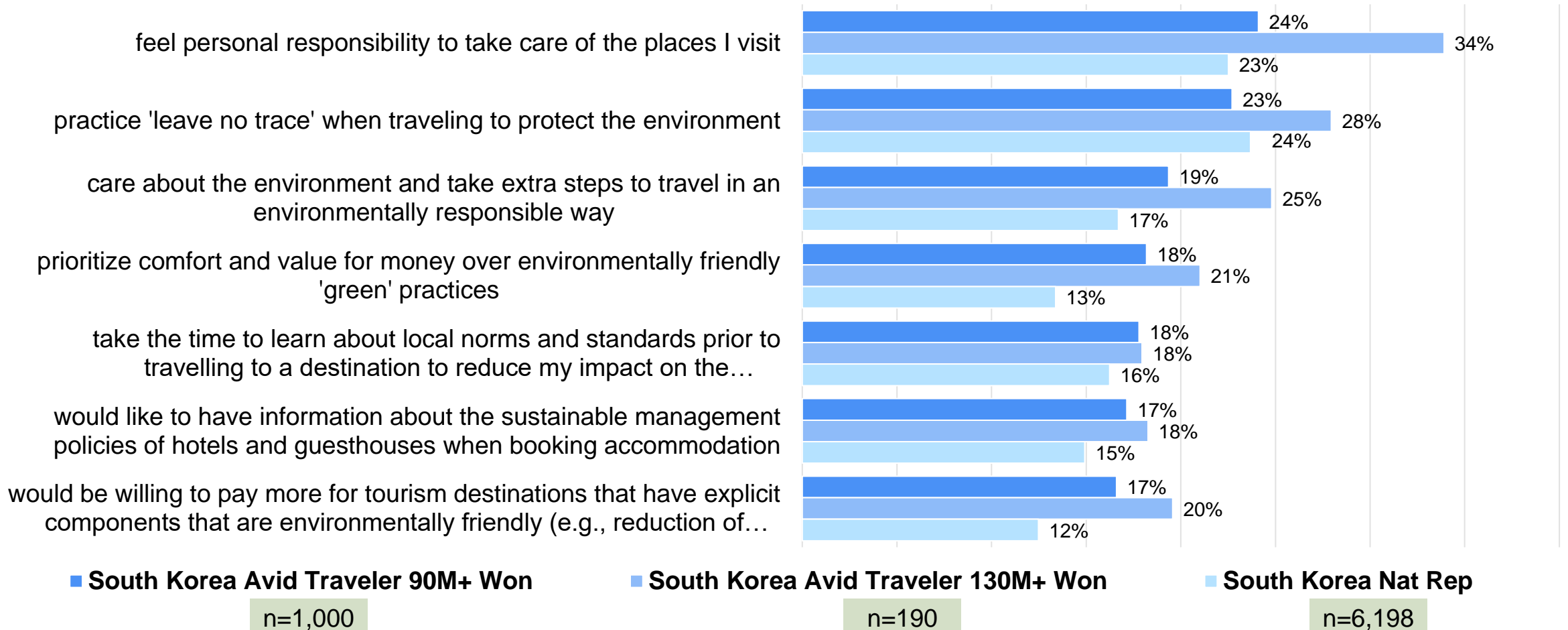


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=6,198

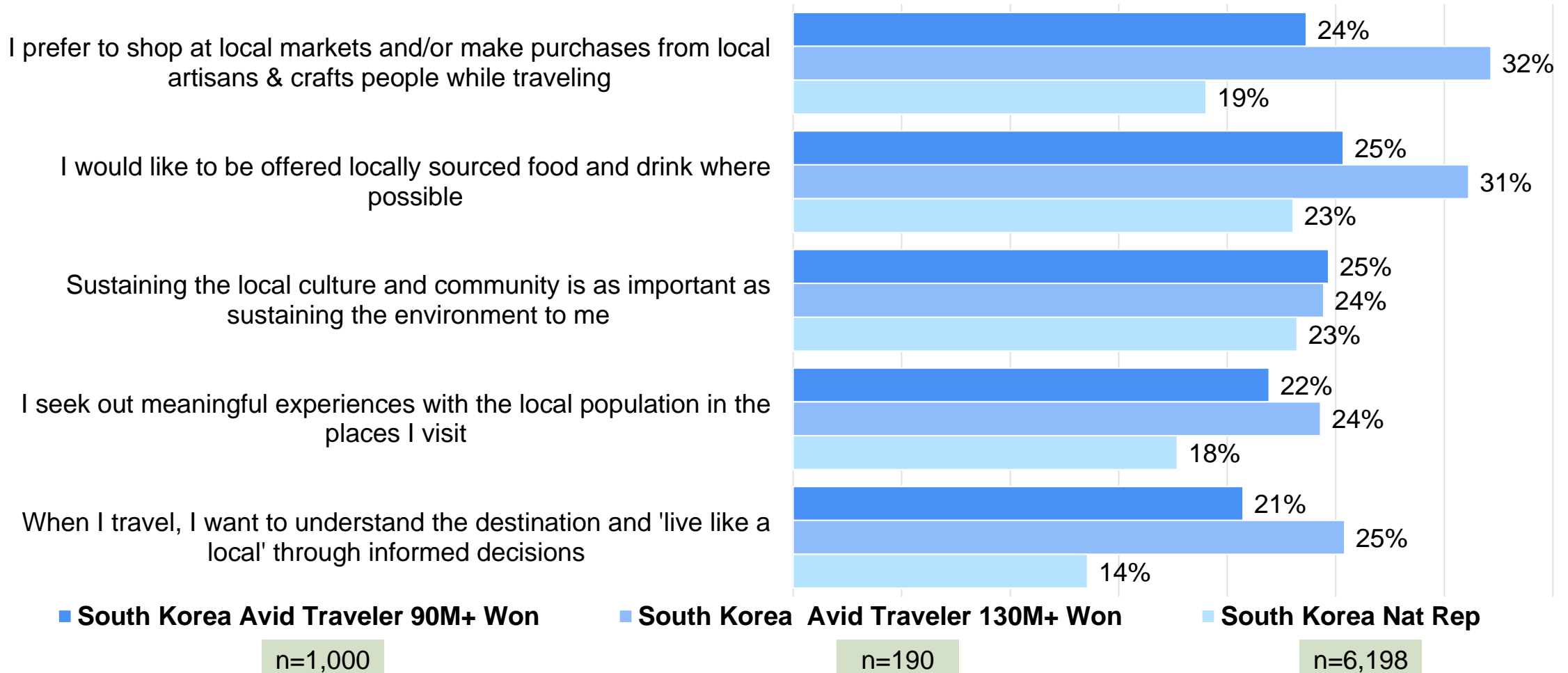
South Korea - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling (Strongly Agree)



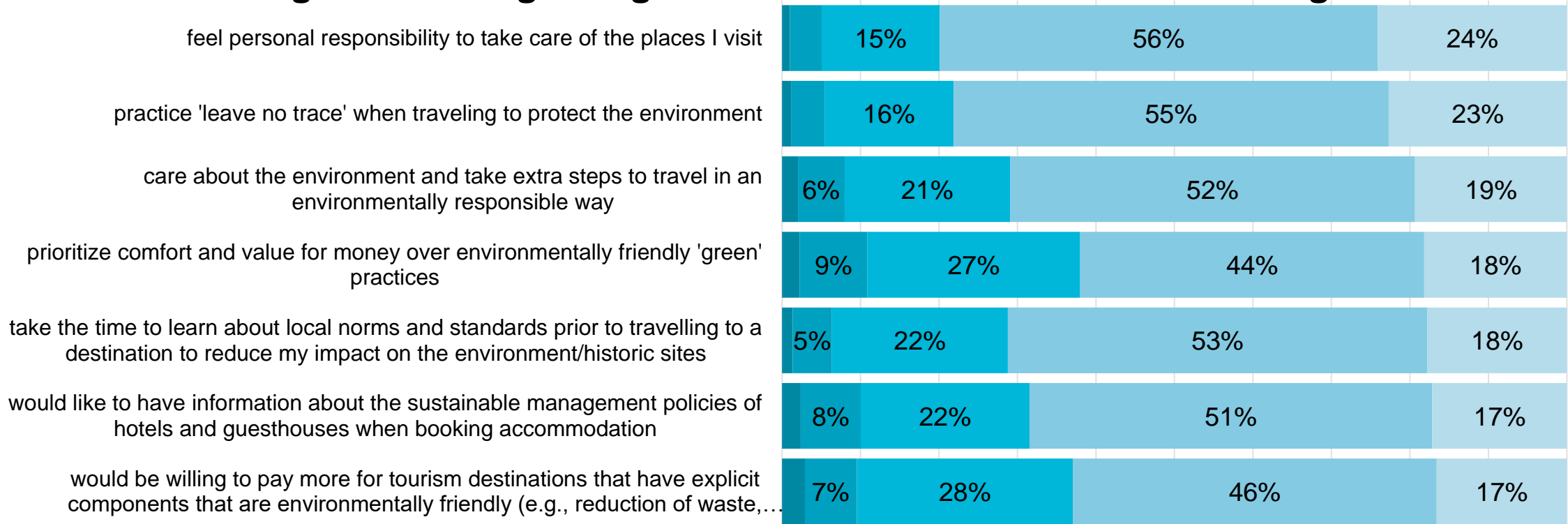
South Korea - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)



South Korea Avid Travelers 90M+ Won: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling



■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,000

South Korea Avid Travelers 90M+ Won: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

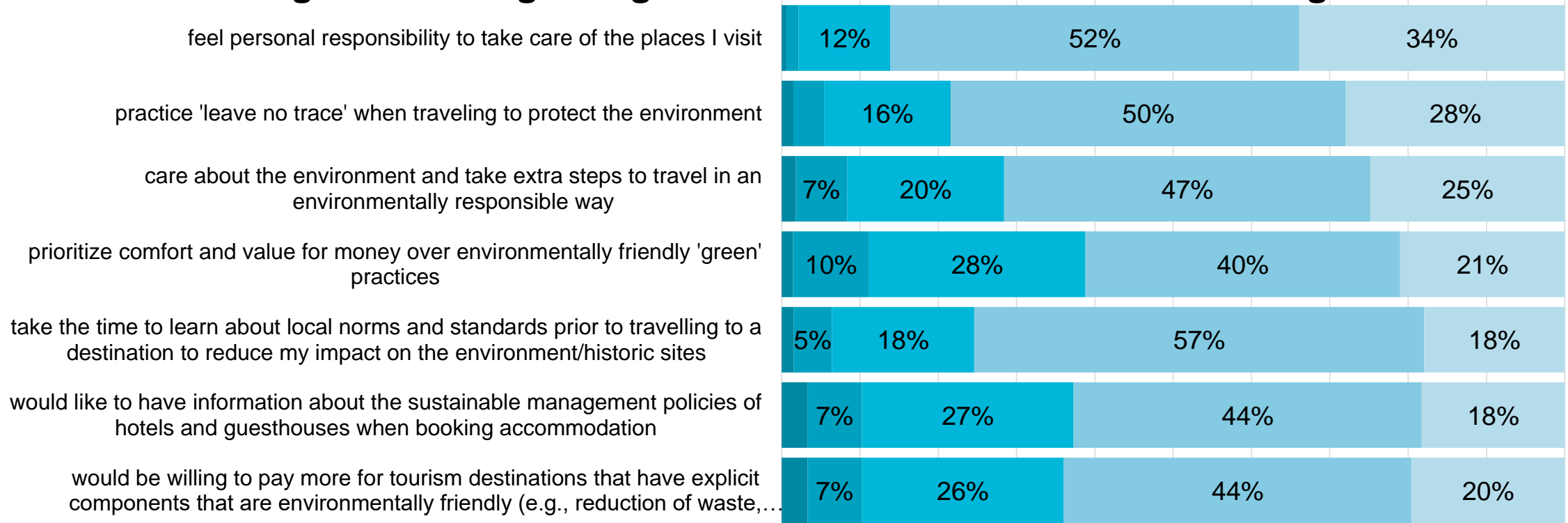


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=1,000

South Korea Avid Travelers 130M+ Won: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

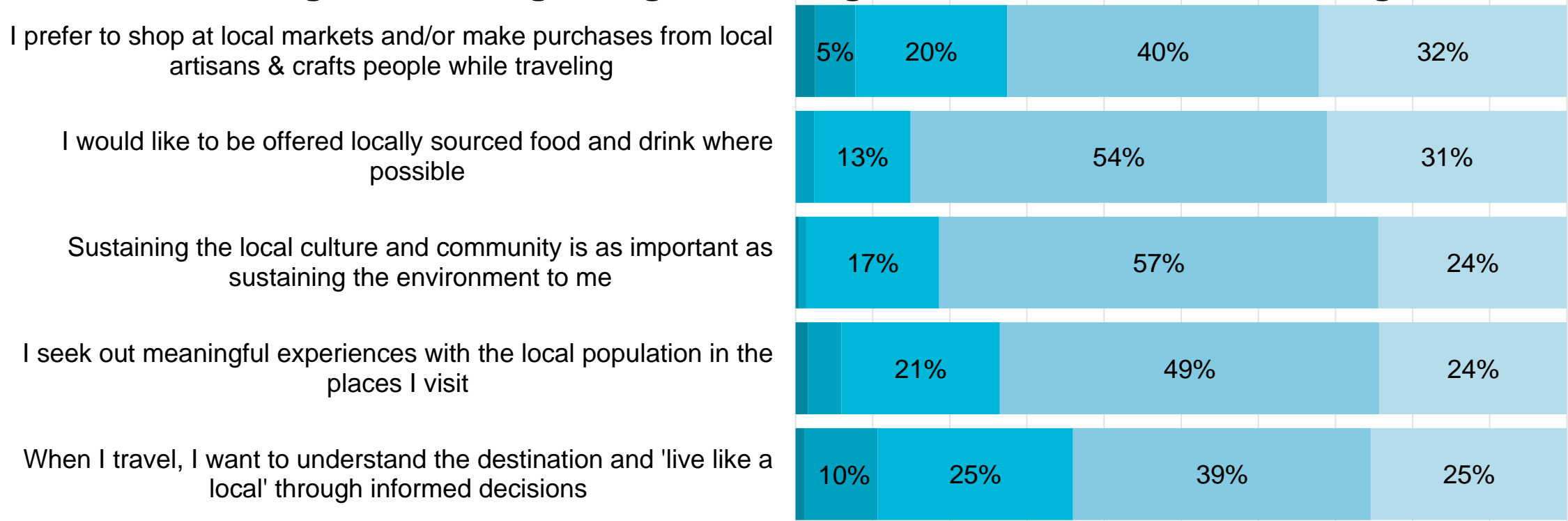


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=190

South Korea Avid Travelers 130M+ Won: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

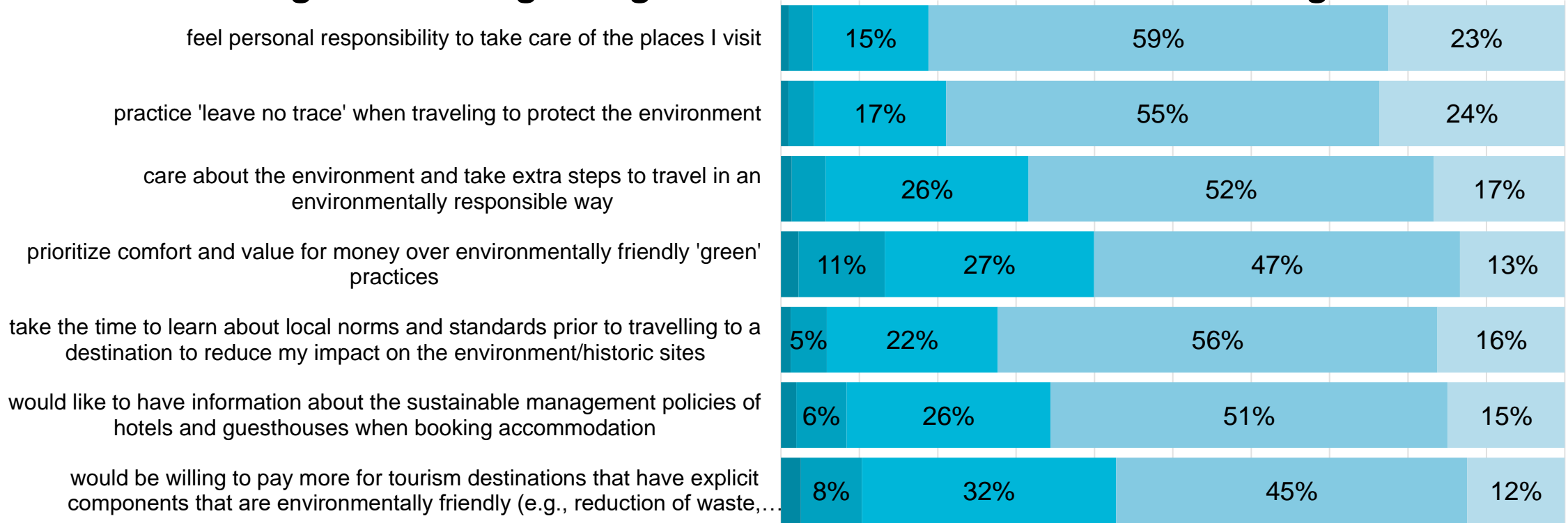


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=190

South Korea Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

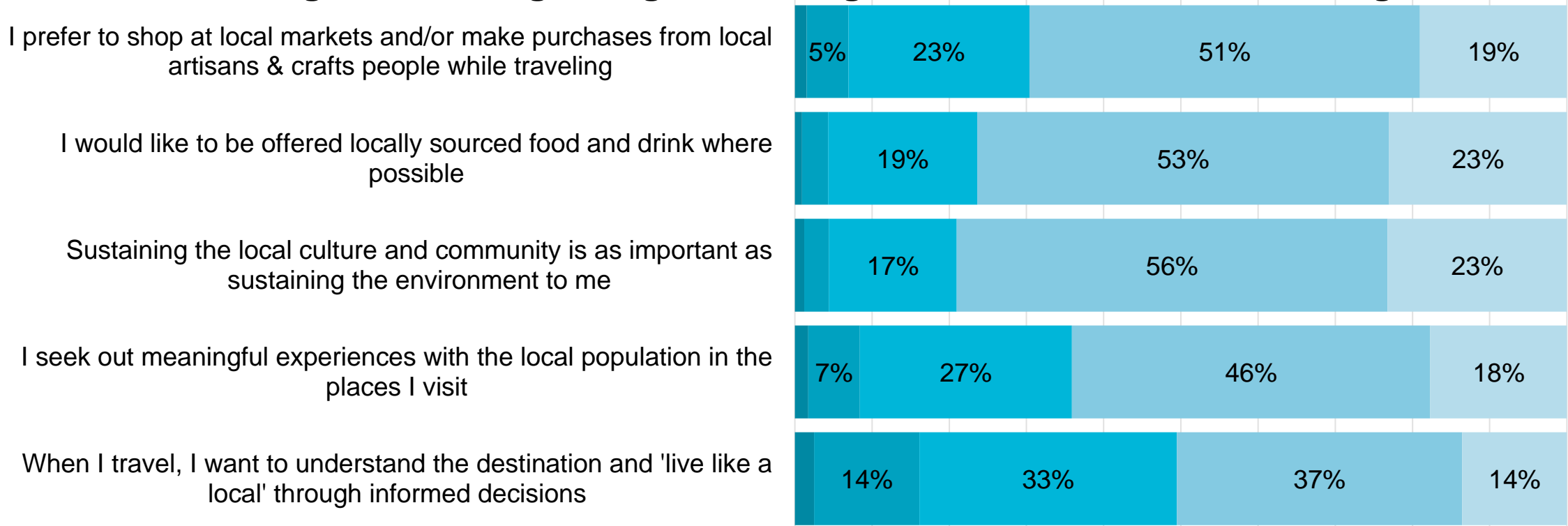


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=6,198

South Korea Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

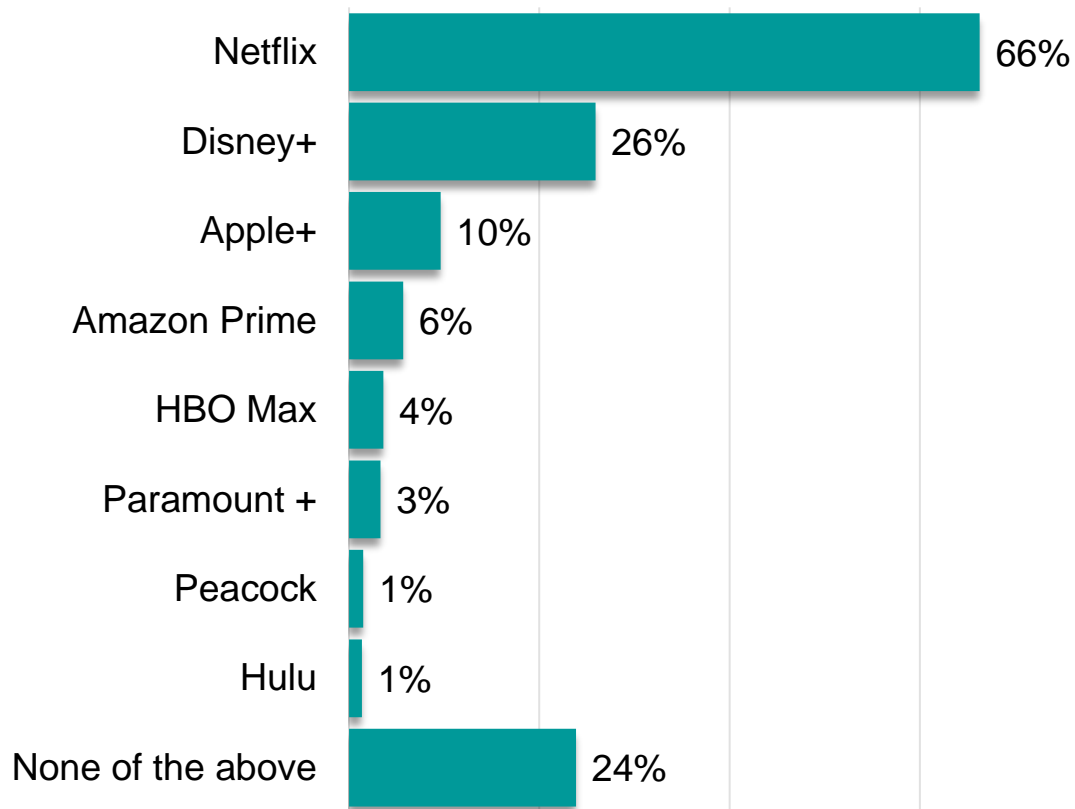


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

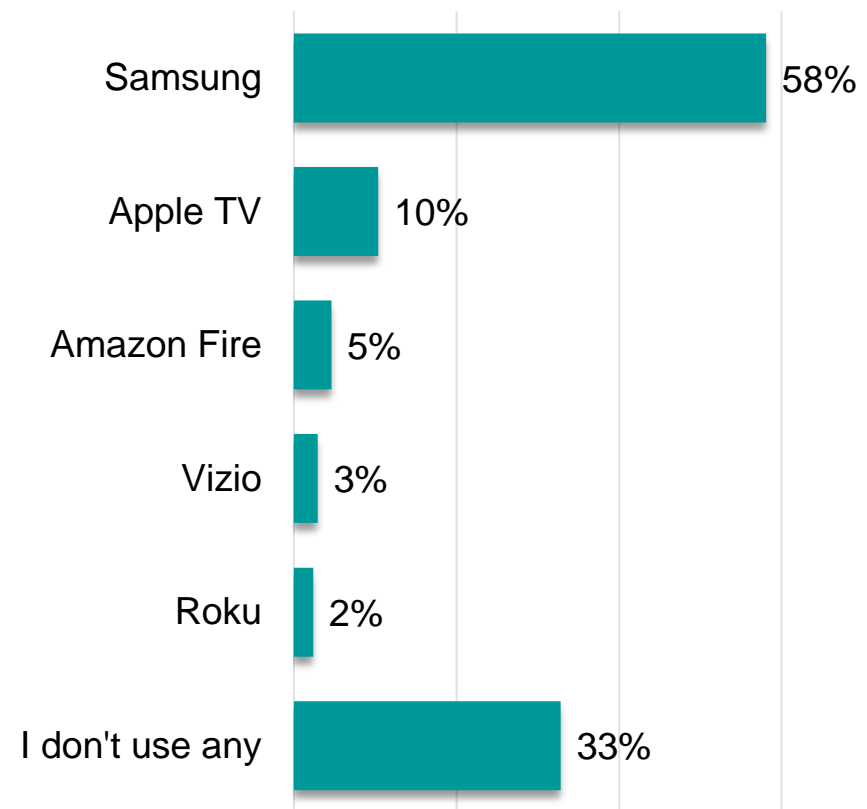
Sample Size: n=6,198

South Korea Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

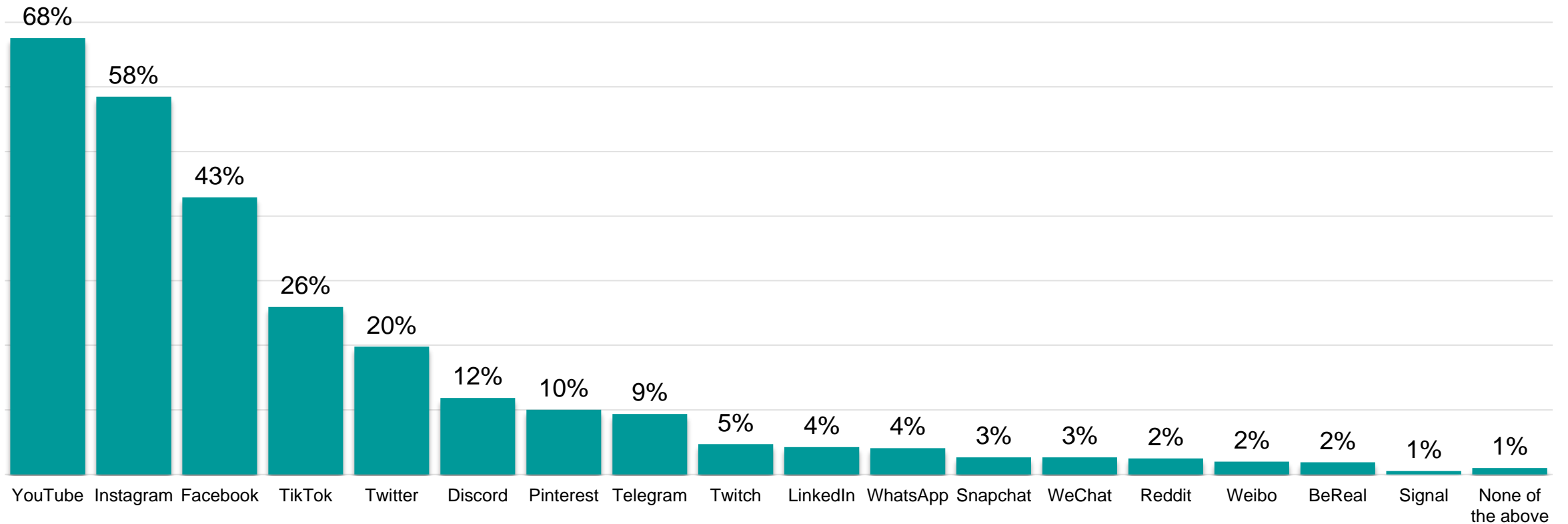


Sample Size: n=6,198

Which of the following streaming platforms do you view on a weekly basis, if any? Select all that apply. | Which Connected TV/Streaming Device do you currently use to view content? | Which of the following social media platforms and/or instant messaging apps have you used in the past week? | In which of the following ways did you become aware of various travel destinations to consider? | After seeing a travel destination, whether on TV, online, through social media or other channels, what actions do you typically take? **Select all that apply**

South Korea Media Consumption

Social Media Platforms Used Weekly



Sample Size: n=6,198

Which of the following streaming platforms do you view on a weekly basis, if any? Select all that apply. | Which Connected TV/Streaming Device do you currently use to view content? | Which of the following social media platforms and/or instant messaging apps have you used in the past week? | In which of the following ways did you become aware of various travel destinations to consider? | After seeing a travel destination, whether on TV, online, through social media or other channels, what actions do you typically take? **Select all that apply**

South Korea Media Consumption

Travel Destination Source of Awareness

TV Program/Documentary	38%
Online	43%
Radio	4%
TV commercials	28%
Newspaper	6%
Friends/Family	43%
Social Media	37%
YouTube	65%
Out of Home Advertising (e.g., poster billboards, bus shelter advertisements, etc.)	8%
Email	6%
I don't recall	2%

Actions Taken After Seeing an Ad for a Destination

I go to the destination's website	28%
I search for information about the destination online	61%
I look up the destination on social media	39%
I talk to friends/family about the destination	45%
I book travel to the destination almost immediately	13%
I don't do anything	4%
None of the above	3%

Sample Size: n=6,198

Which of the following streaming platforms do you view on a weekly basis, if any? Select all that apply. | Which Connected TV/Streaming Device do you currently use to view content? | Which of the following social media platforms and/or instant messaging apps have you used in the past week? | In which of the following ways did you become aware of various travel destinations to consider? | After seeing a travel destination, whether on TV, online, through social media or other channels, what actions do you typically take? **Select all that apply**