



Vision Insights
South Korea Traveler Profiles
H2 2024
(July 1 – December 31, 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

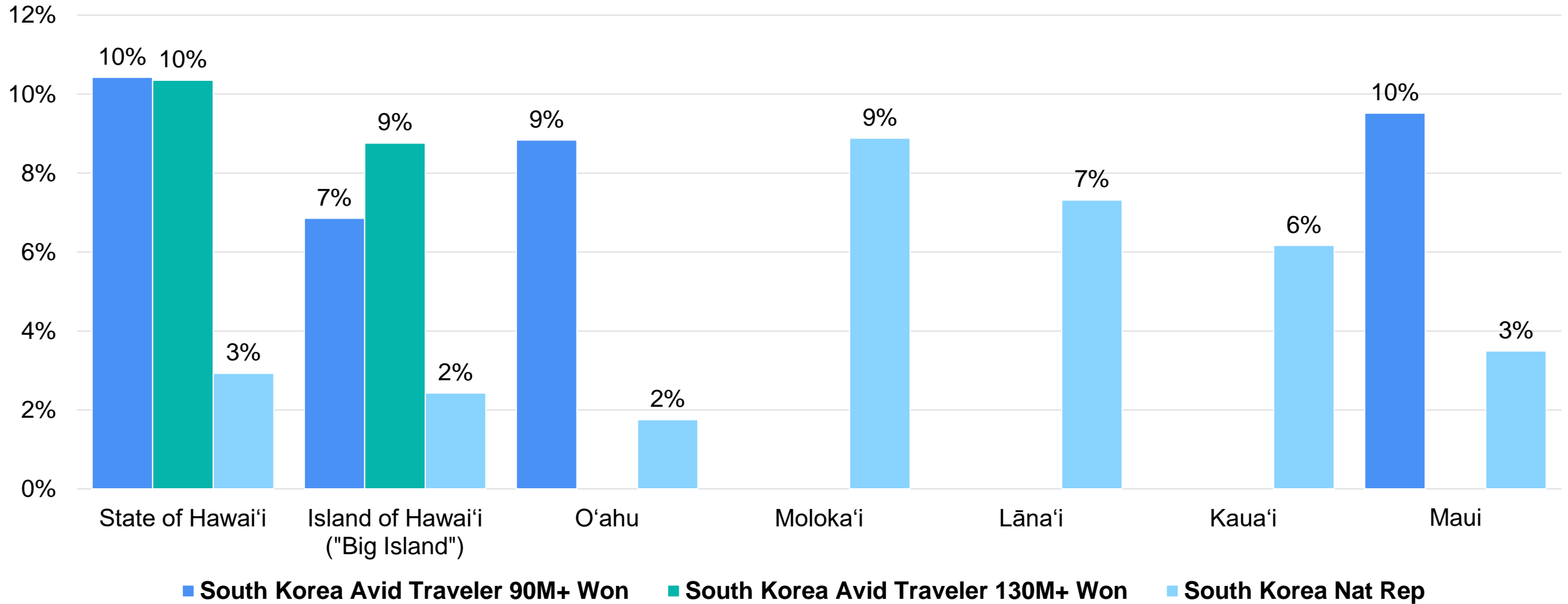
Avid Traveler 130M+ Won

- 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)

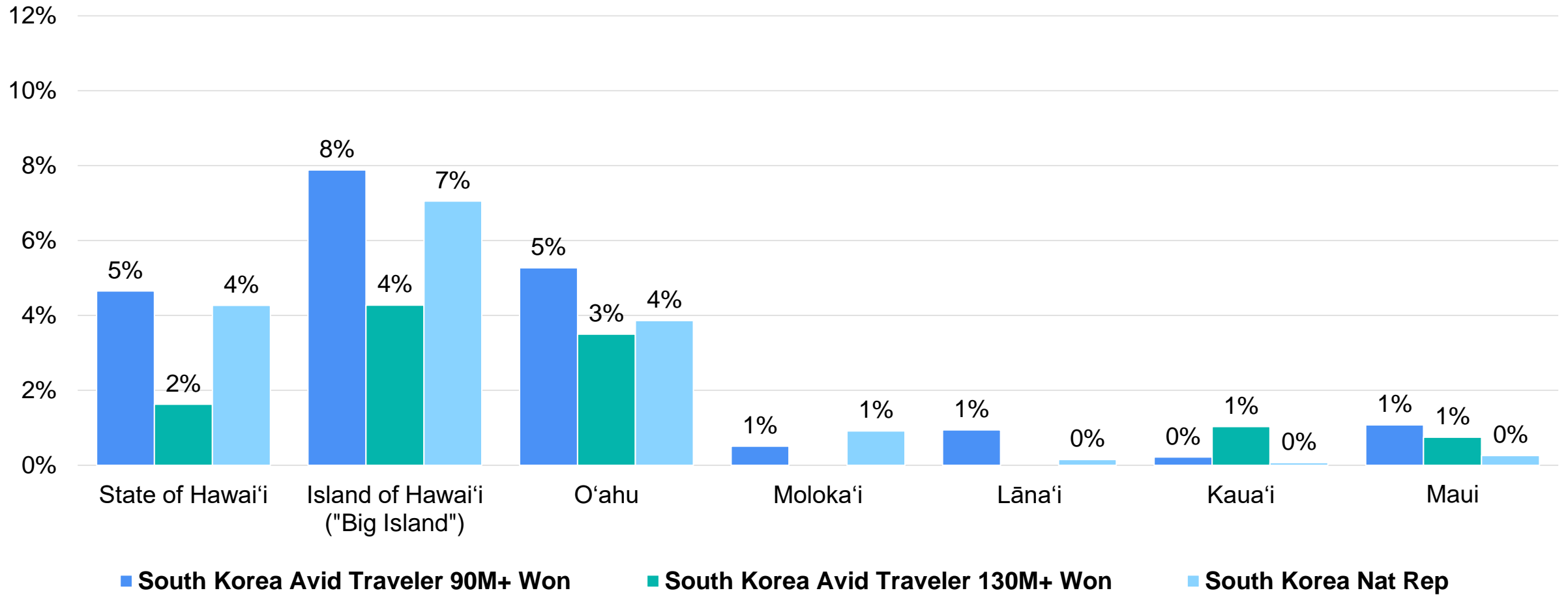
- Representative of South Korea adults in terms of age, gender, social class and education

South Korea - Leisure Trip in Past 12 Months



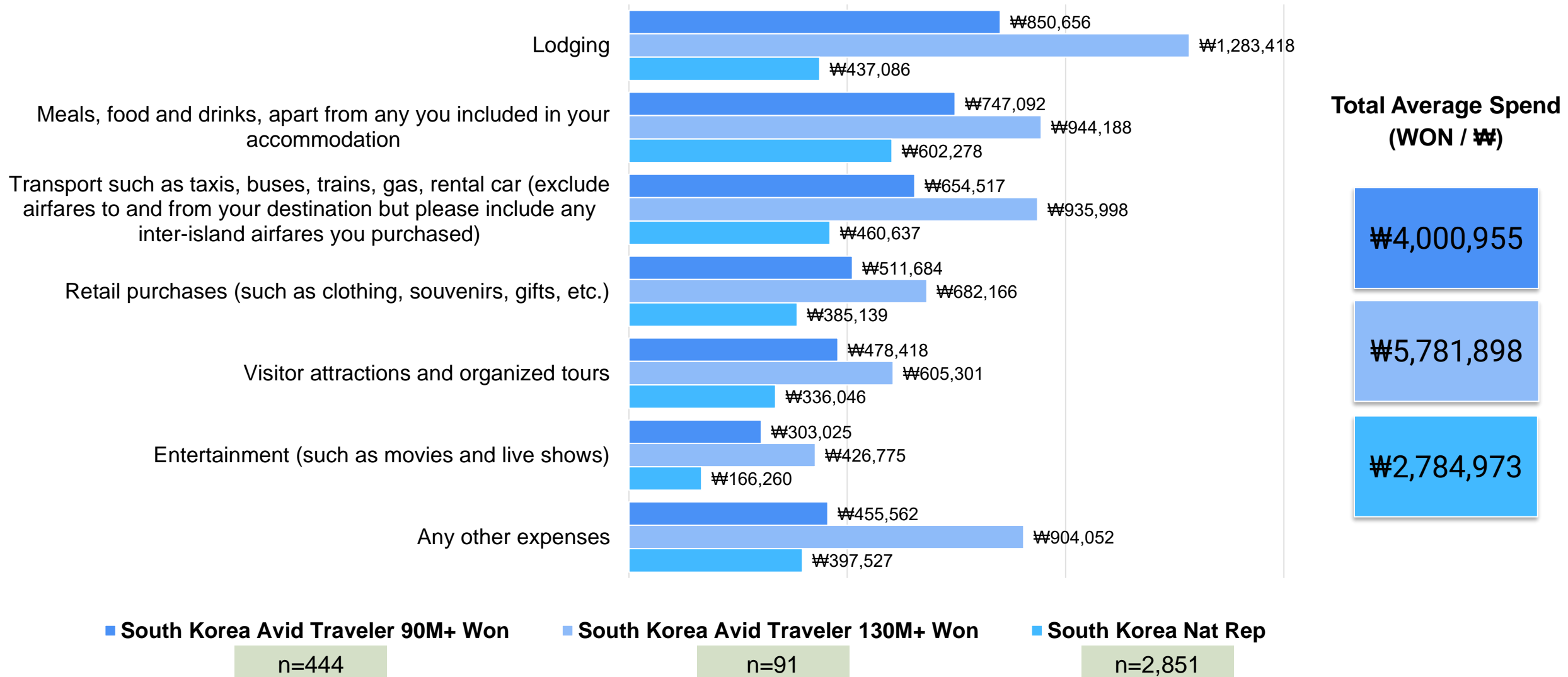
Sample Min. n=50

South Korea - Next Destination for Leisure Trip



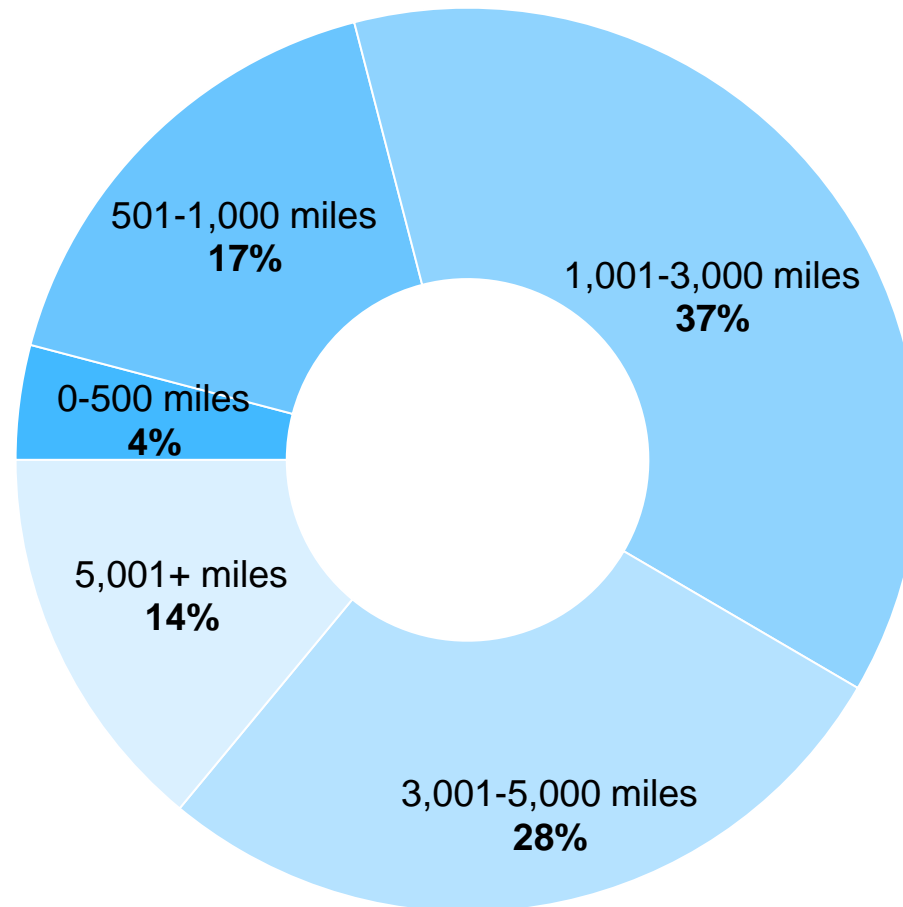
Sample Min. n=50

South Korea - Total Annual Holiday Spend



South Korea Avid Travelers 90M+ Won: Annual Vacation

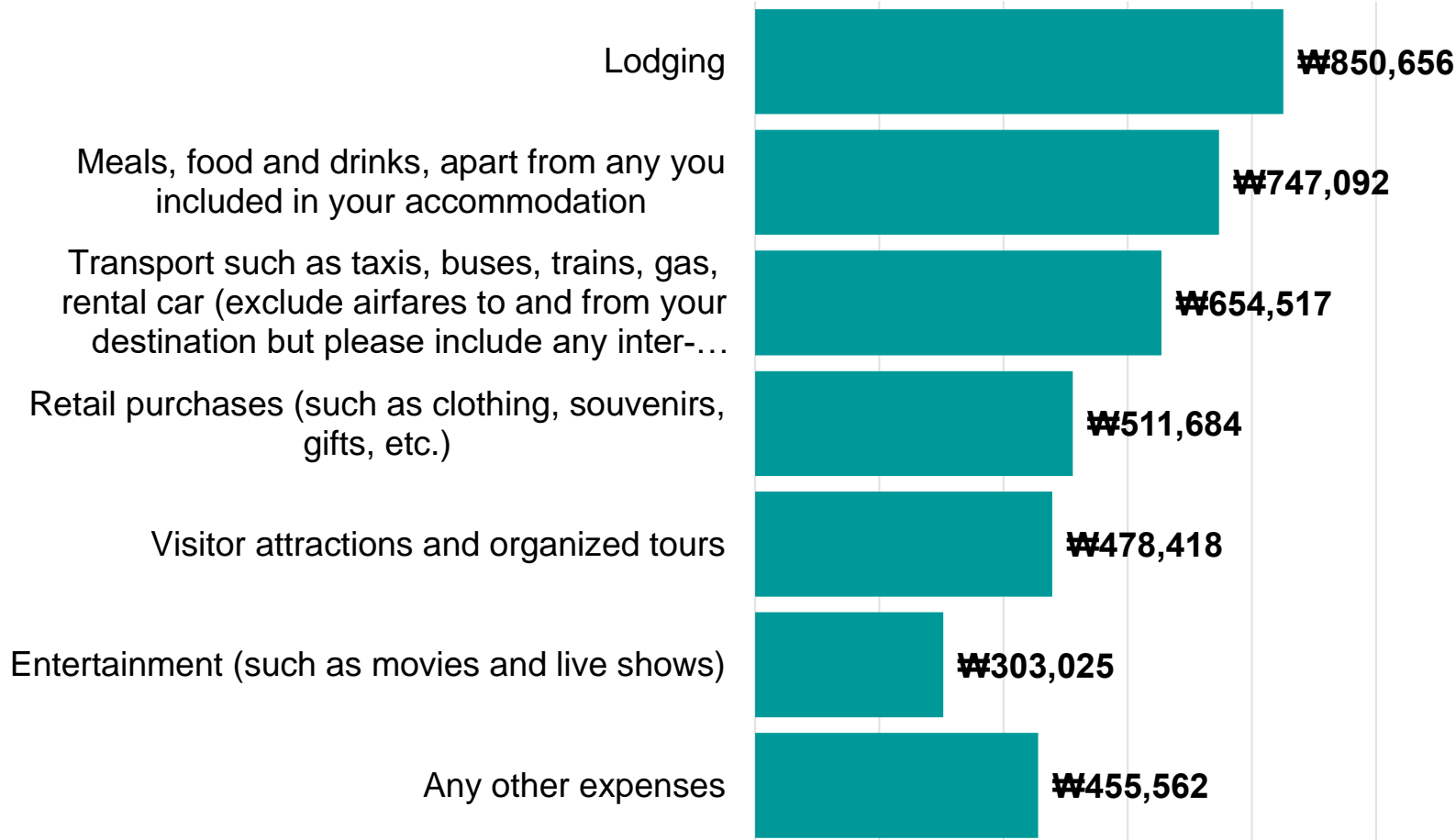
Distance Travelled on Annual Vacation



Sample Size: n=444

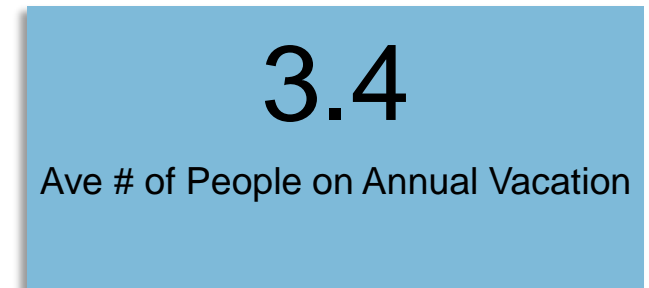
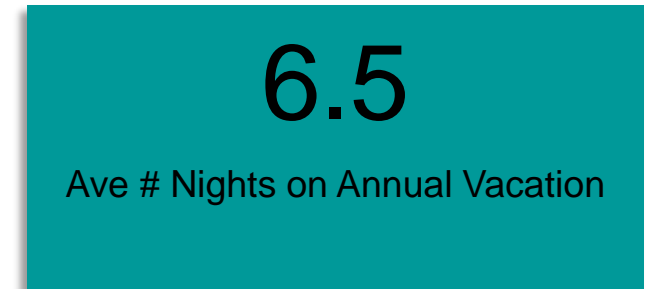
South Korea Avid Travelers 90M+ Won: Annual Vacation

Average Spend



Sample Size: n=444

Spend Per Person Per Day

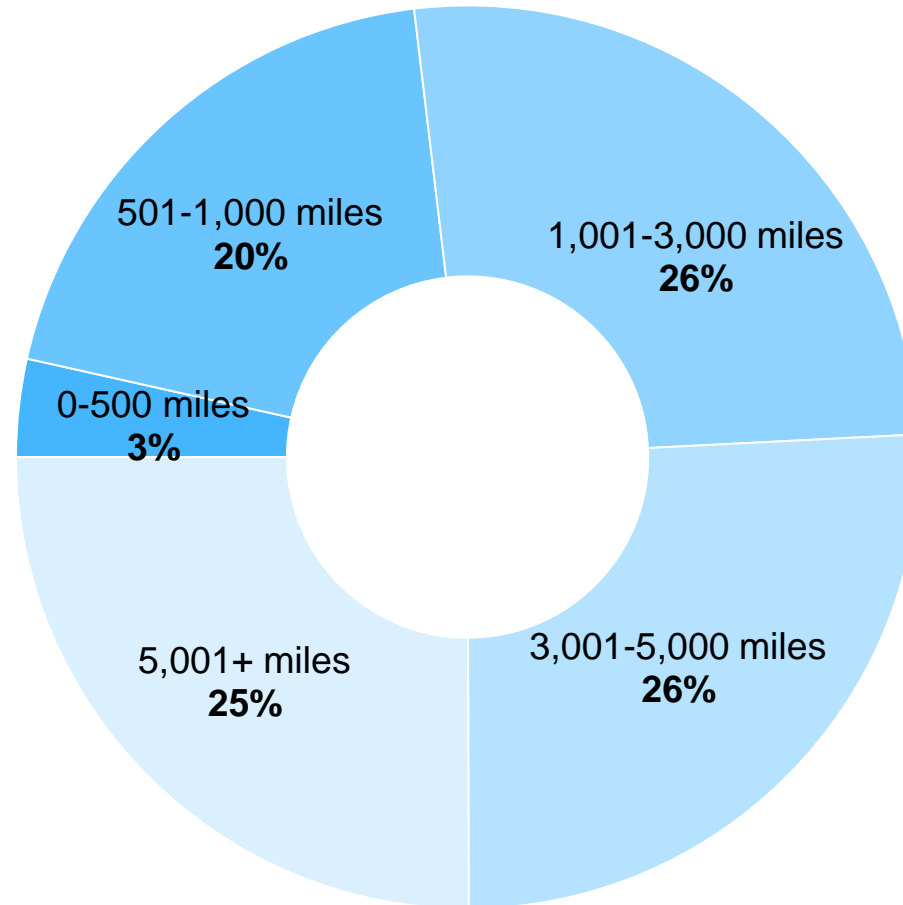


₩183,779

Ave. Per Person Per Day Spend

South Korea Avid Travelers 130M+ Won: Annual Vacation

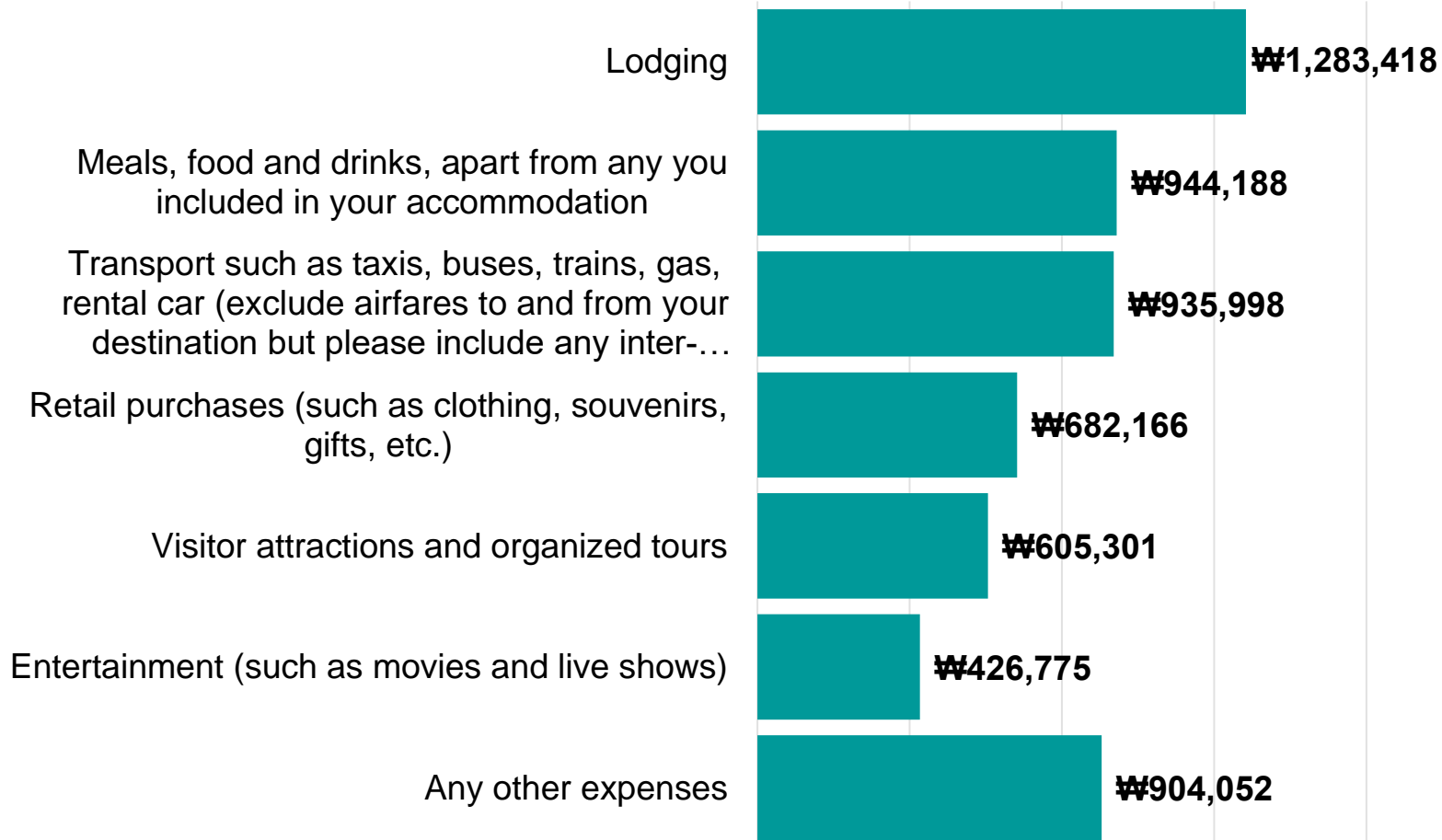
Distance Travelled on Annual Vacation



Sample Size: n=91

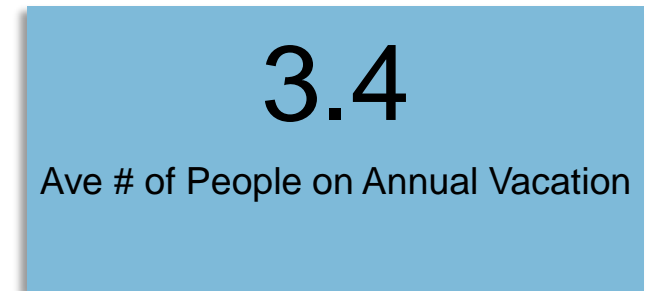
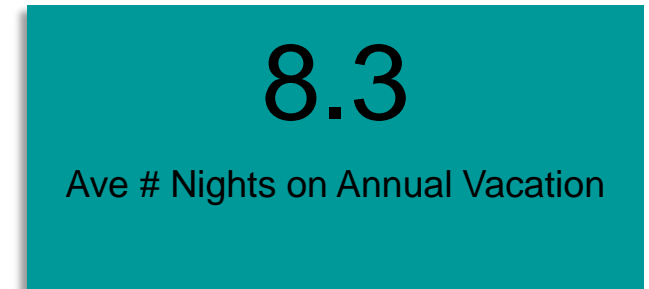
South Korea Avid Travelers 130M+ Won: Annual Vacation

Average Spend



Sample Size: n=91

Spend Per Person Per Day

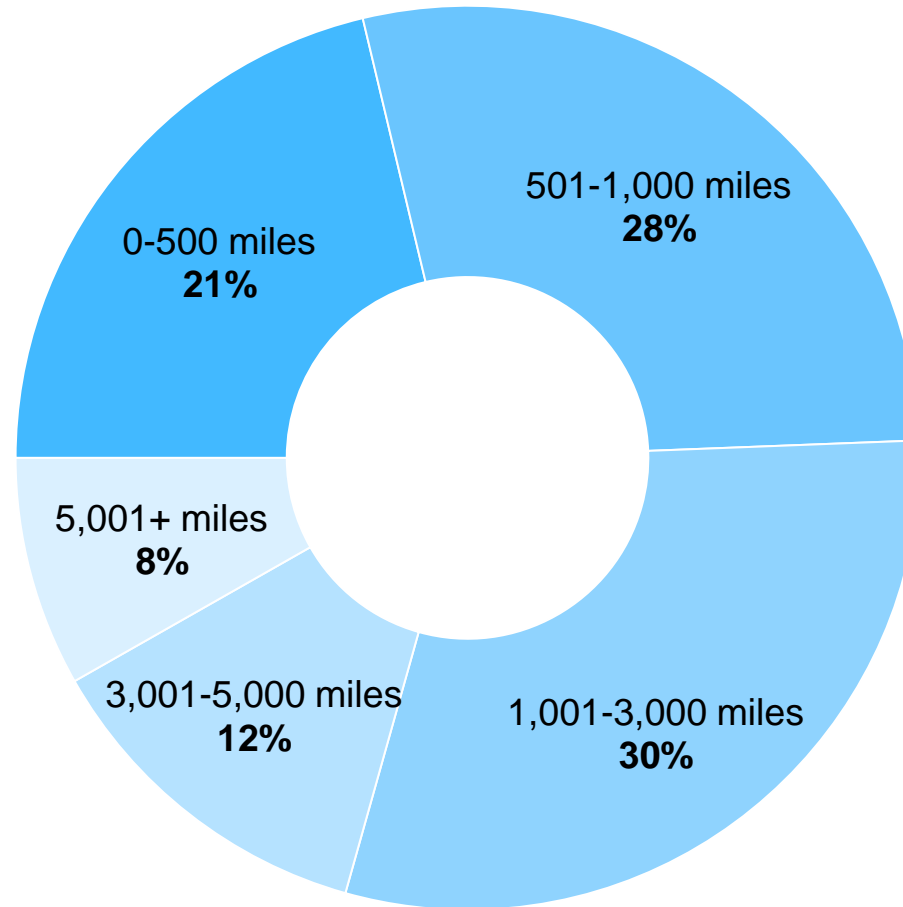


₩203,969

Ave. Per Person Per Day Spend

South Korea Nat Rep: Annual Vacation

Distance Travelled on Annual Vacation



Sample Size: n=2,851

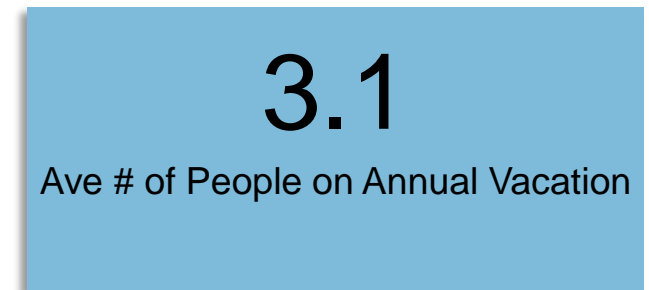
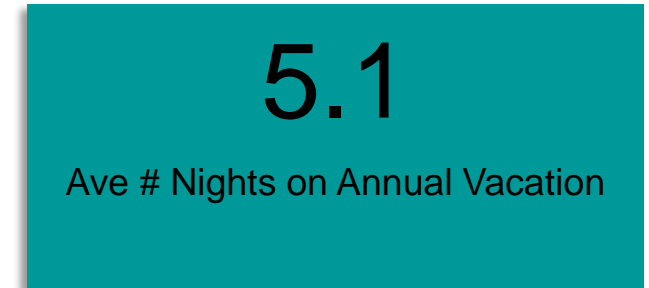
South Korea Nat Rep: Annual Vacation

Average Spend



Sample Size: n=2,851

Spend Per Person Per Day



₩176,721

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	32%	24%	45%
Comfort and accessibility	37%	34%	41%
Natural attractions/activities	27%	25%	30%
Family friendly locations and activities	33%	39%	28%
Opportunity to experience local restaurants/businesses	29%	31%	22%
Cultural attractions	29%	28%	28%
Entertainment and nightlife	18%	18%	14%
Consideration of sustainable principles	17%	13%	18%
Safe and secure destination	54%	57%	59%

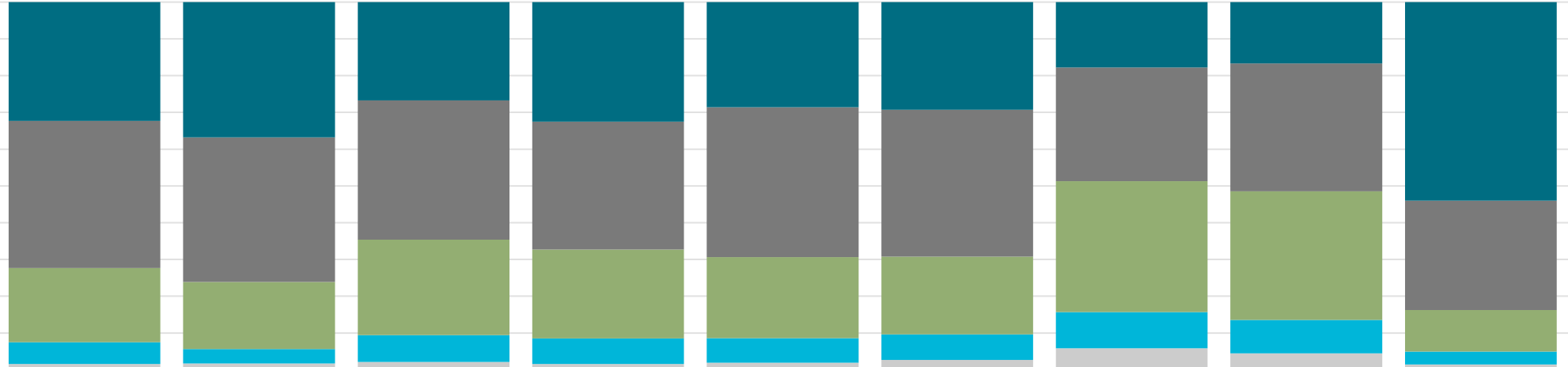
Sample Size:

n=444

n=91

n=2,851

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

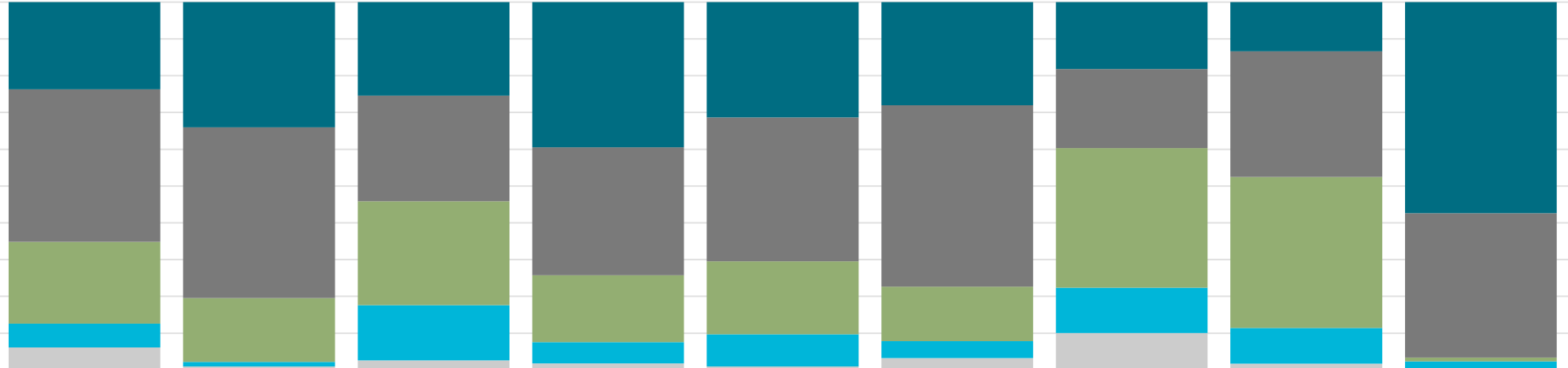


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	32%	37%	27%	33%	29%	29%	18%	17%	54%
4	40%	39%	38%	35%	41%	40%	31%	35%	30%
3	20%	18%	26%	24%	22%	21%	36%	35%	11%
2	6%	4%	7%	7%	7%	7%	10%	9%	3%
Not very Important 1	2%	2%	2%	2%	2%	3%	6%	4%	1%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=444

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

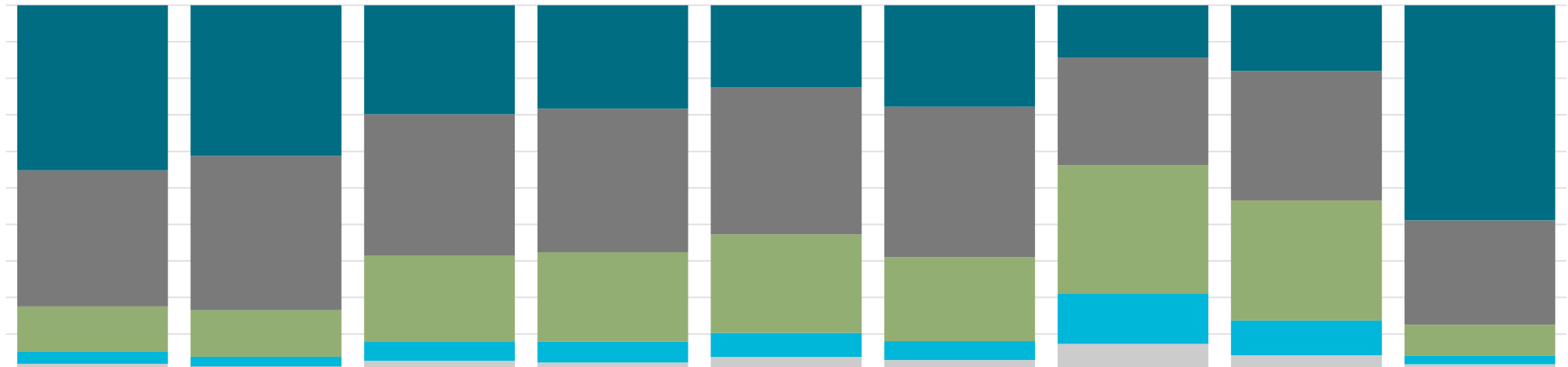


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	24%	34%	25%	39%	31%	28%	18%	13%	57%
4	41%	46%	29%	35%	39%	49%	21%	34%	39%
3	22%	17%	28%	18%	20%	15%	38%	41%	1%
2	7%	1%	15%	6%	9%	5%	12%	10%	2%
Not very Important 1	6%	1%	3%	2%	1%	3%	10%	2%	0%

Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=91

South Korea Nat Rep: Importance of Travel Factors



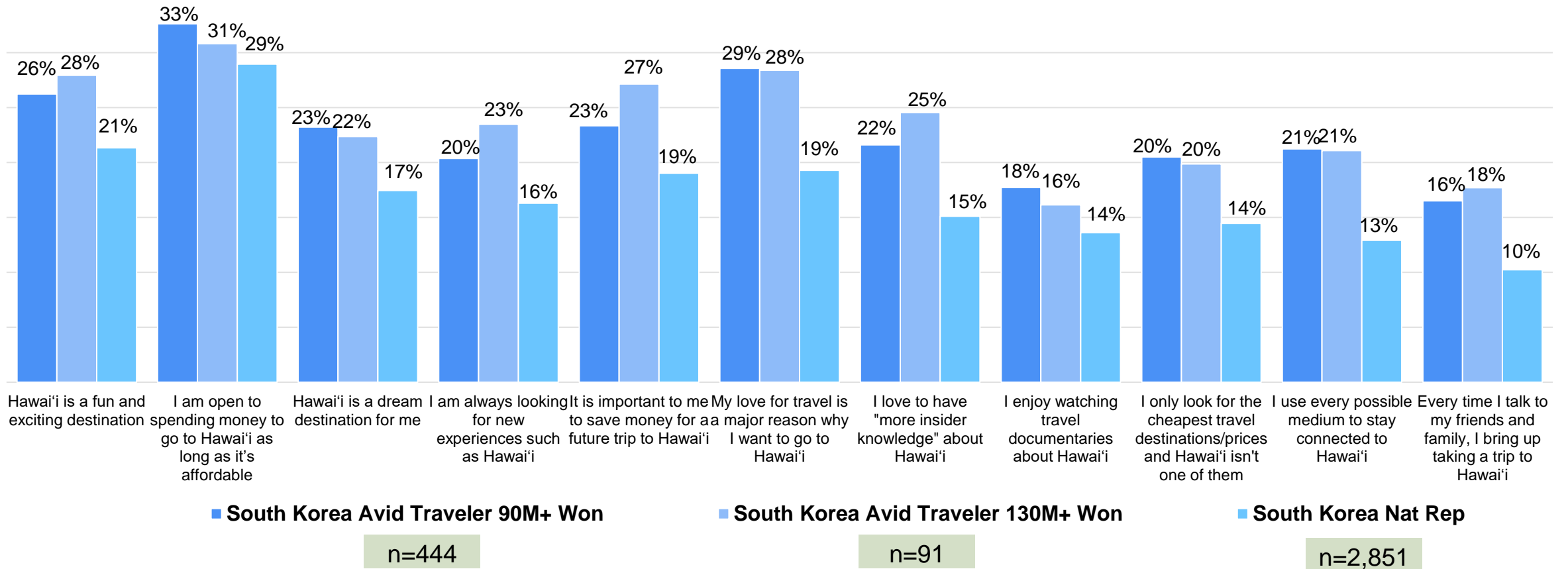
	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	45%	41%	30%	28%	23%	28%	14%	18%	59%
4	37%	42%	39%	39%	40%	41%	29%	35%	29%
3	12%	13%	24%	24%	27%	23%	35%	33%	8%
2	3%	3%	5%	6%	7%	5%	14%	10%	2%
Not very Important 1	2%	1%	3%	2%	4%	3%	7%	4%	2%

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

Sample Size: n=2,851

South Korea - Hawai'i as an Aspirational Destination

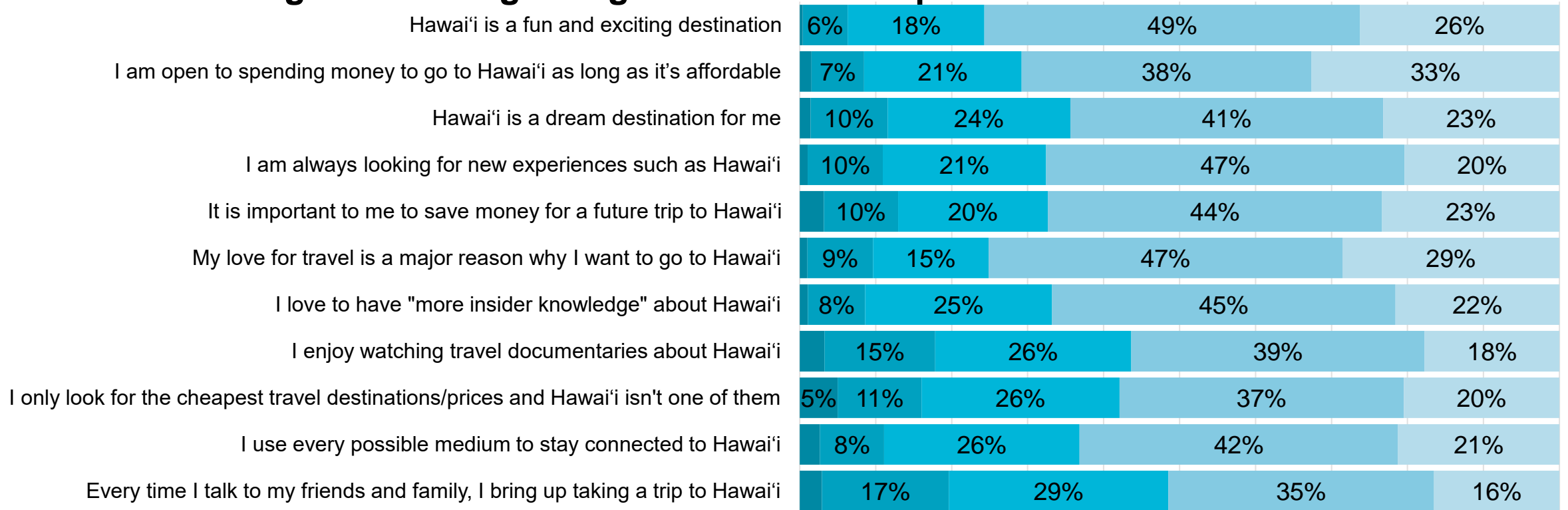
Agreement Regarding Hawai'i as a Travel Destination (Strongly Agree)



Please tell us how much you agree or disagree with each statement below about Hawai'i as a travel destination to you?

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

Agreement Regarding Hawai'i as an Aspirational Destination

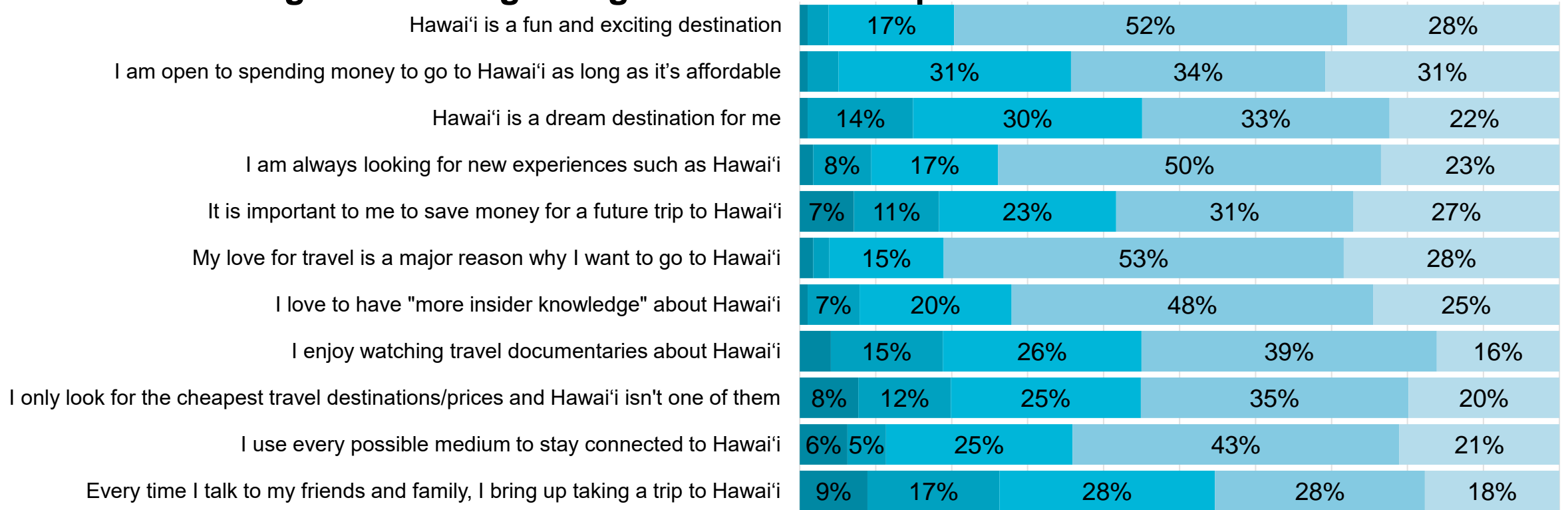


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=444

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

Agreement Regarding Hawai'i as an Aspirational Destination

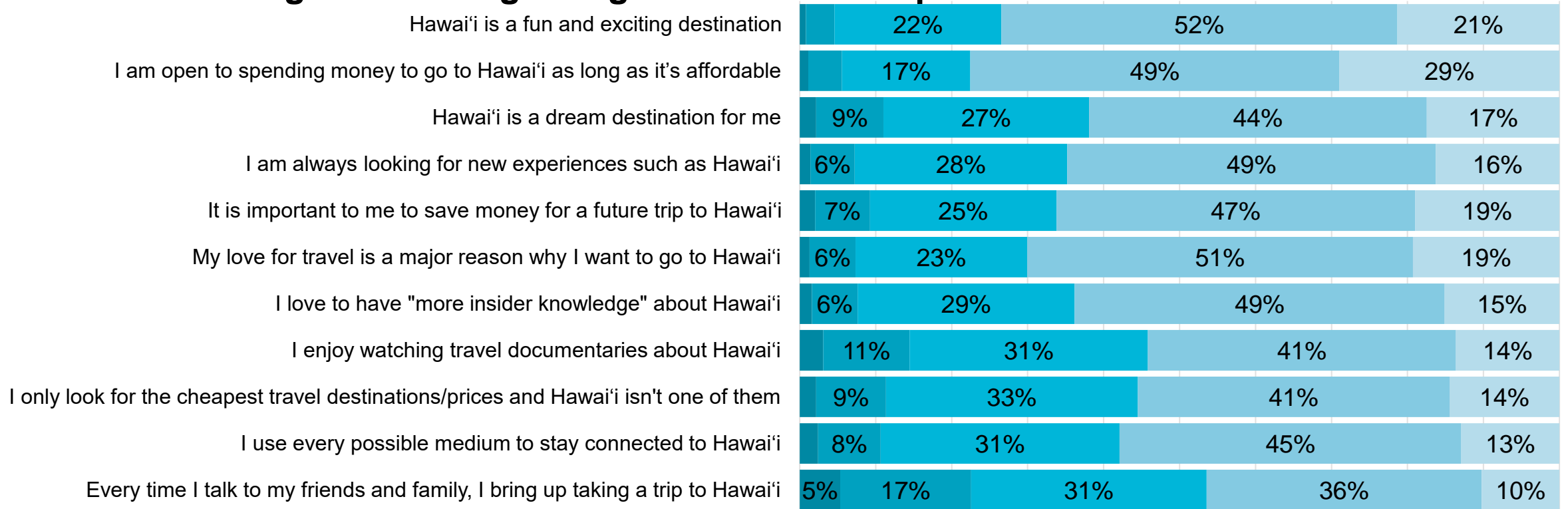


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=91

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

Agreement Regarding Hawai'i as an Aspirational Destination

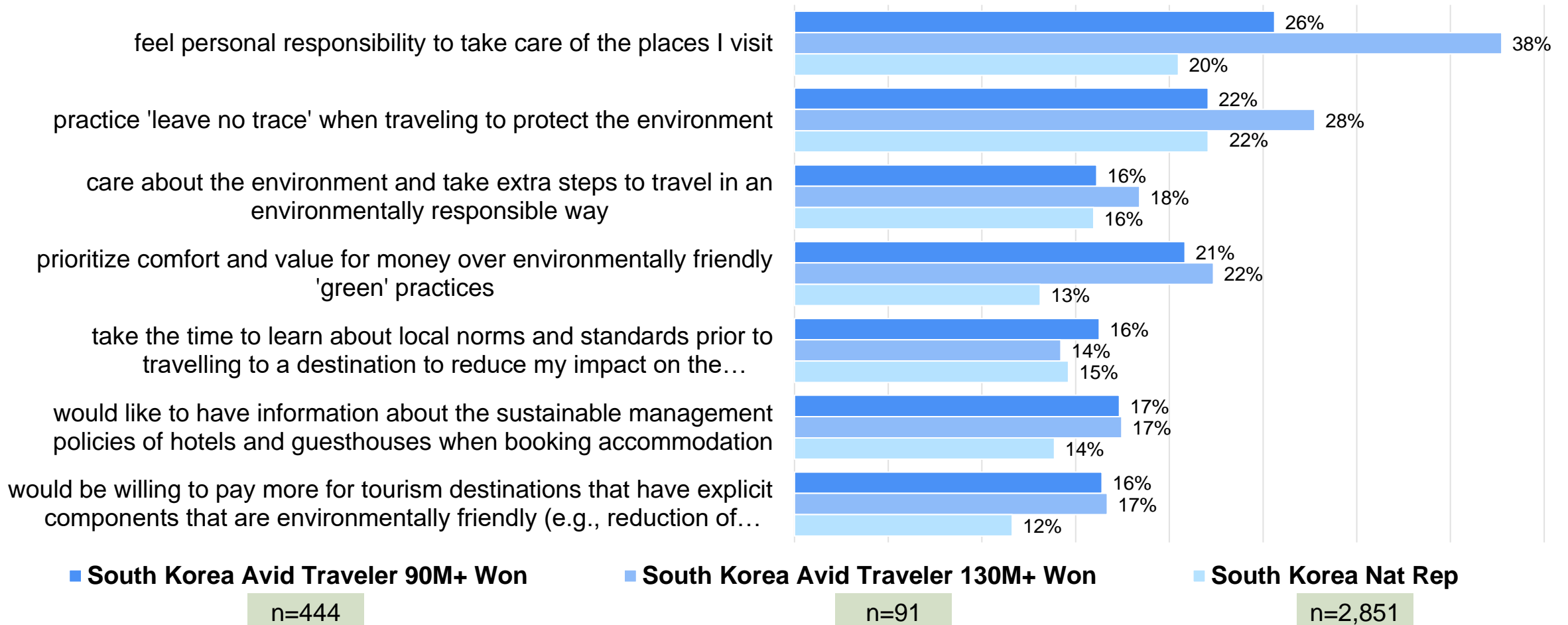


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=2,851

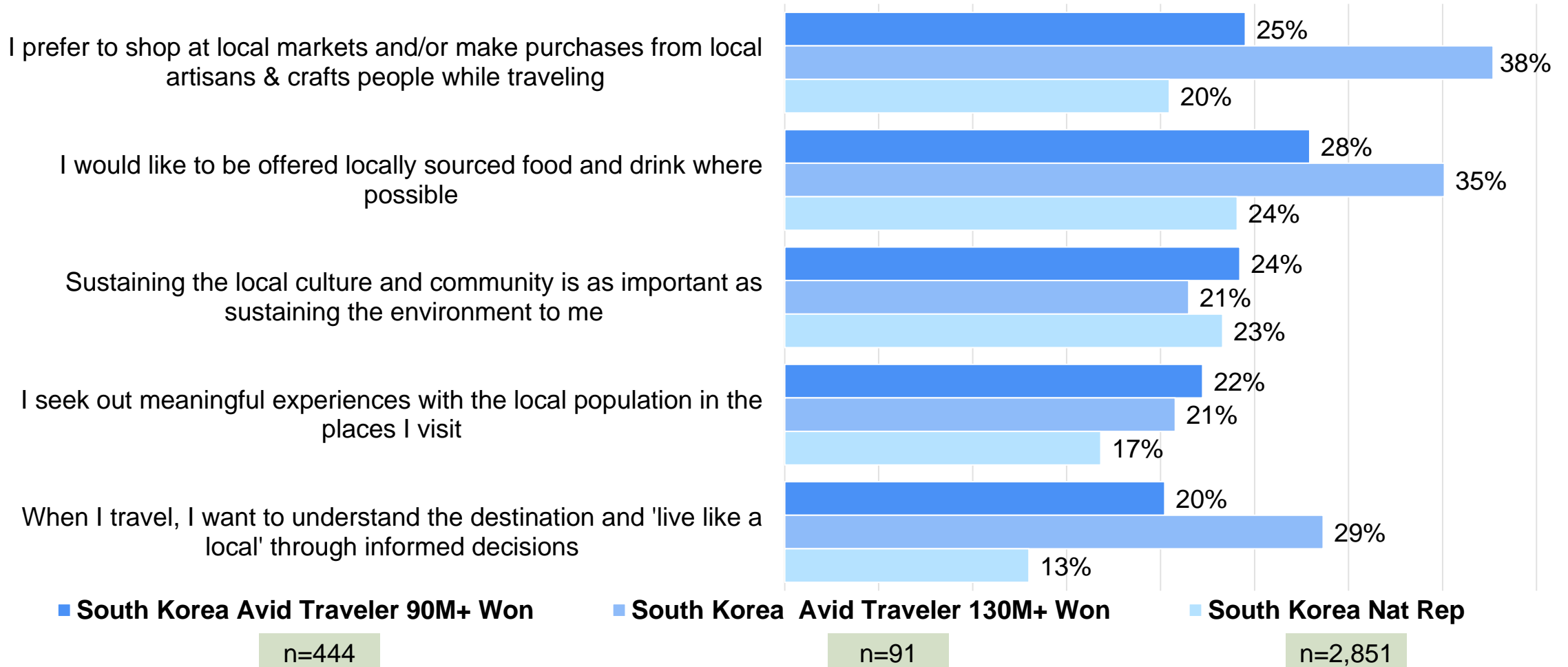
South Korea - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling (Strongly Agree)



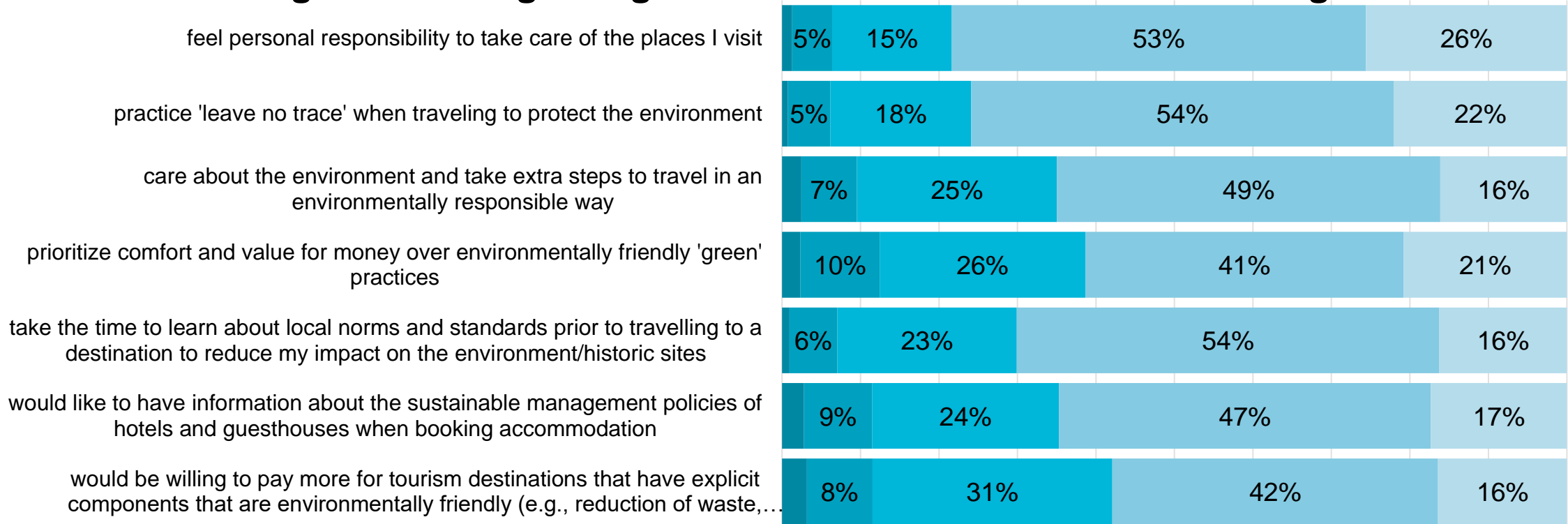
South Korea - Sustainability and Travel Responsibility Statements

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=444

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

Agreement Regarding Sustaining Local Culture While Traveling

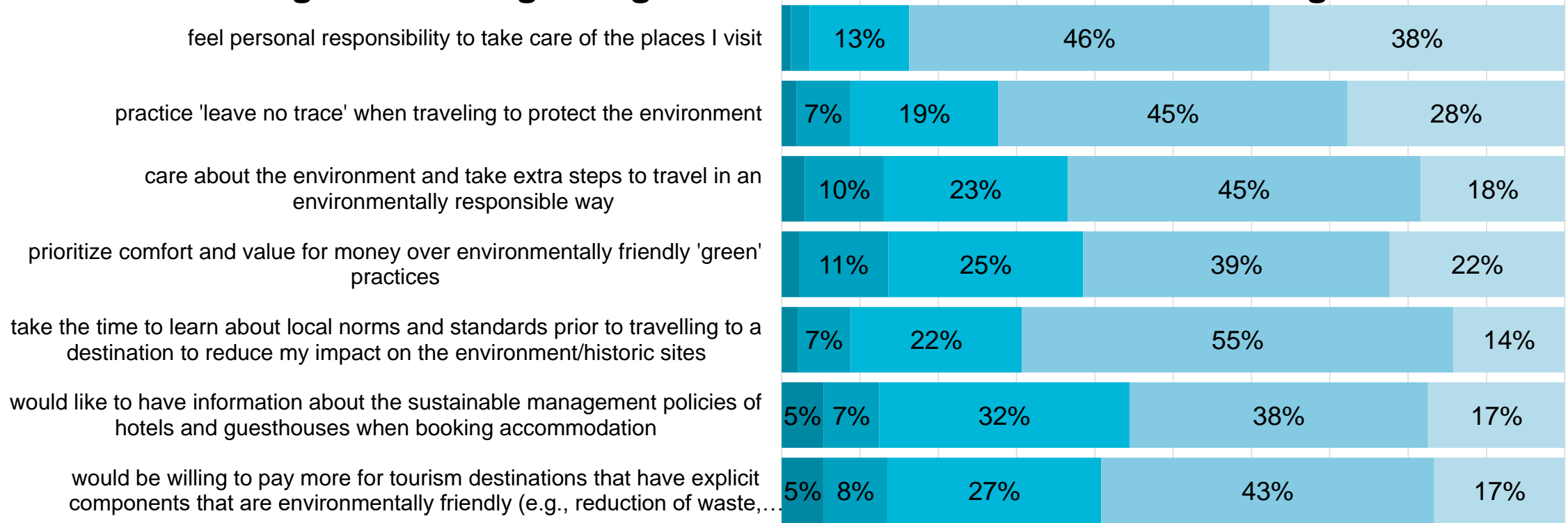


■ Strongly disagree
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Sample Size: n=444

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

Agreement Regarding Sustainable Practices While Traveling

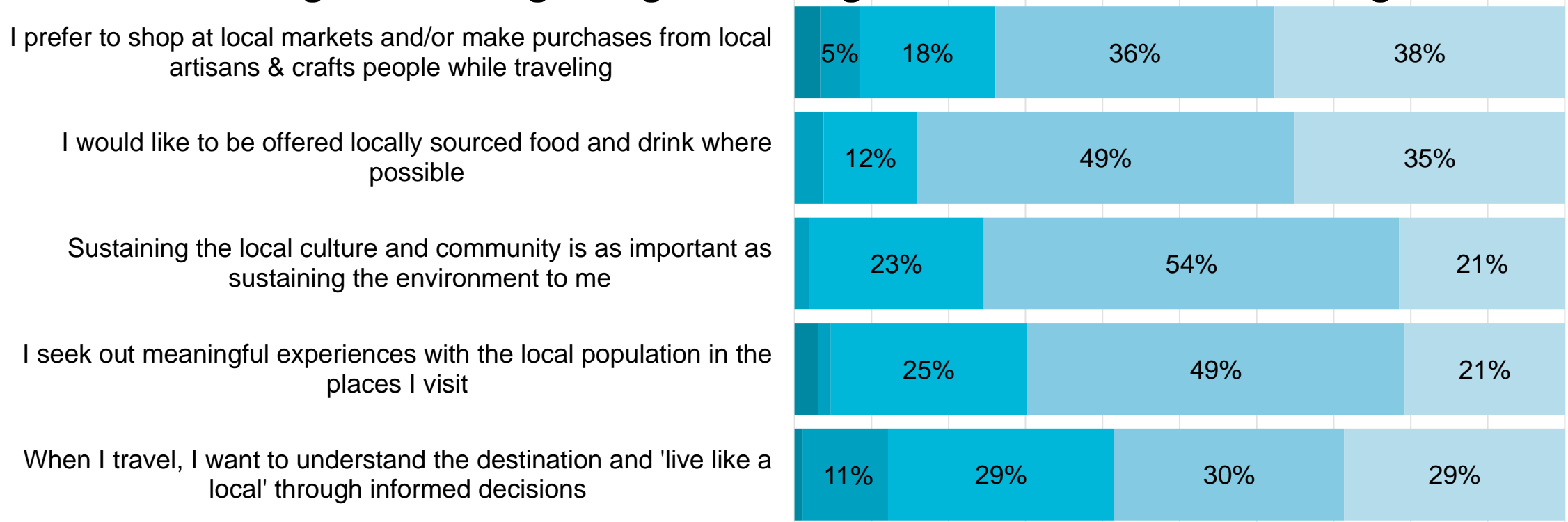


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=91

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

Agreement Regarding Sustaining Local Culture While Traveling

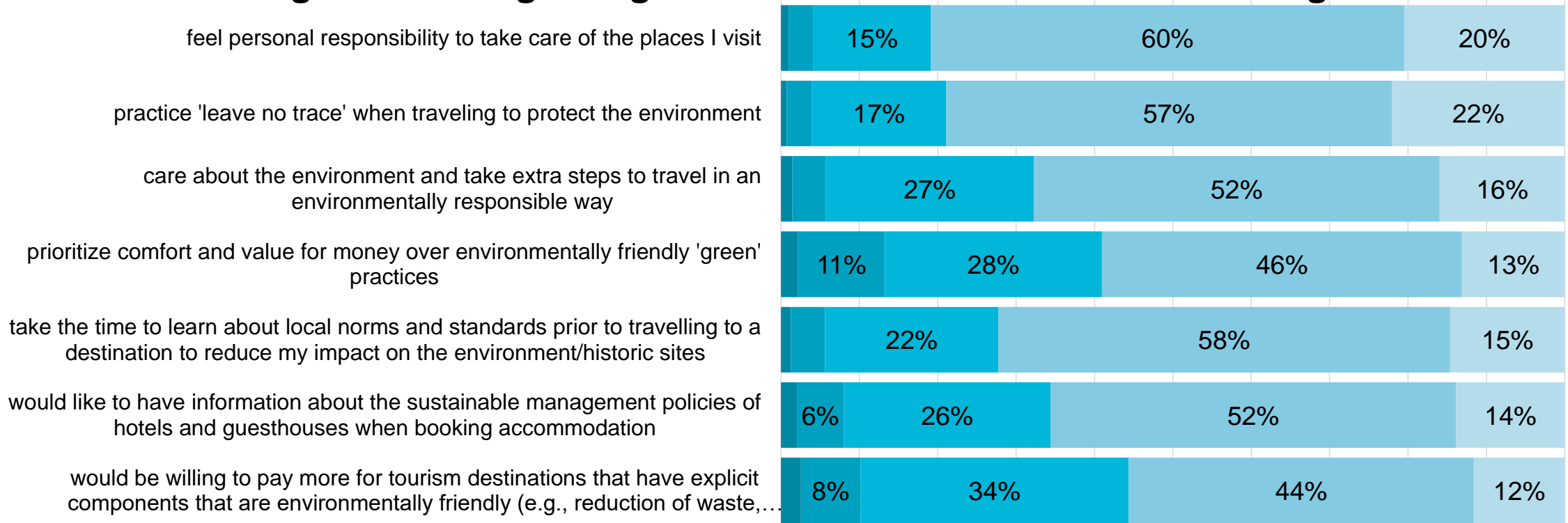


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=91

South Korea Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

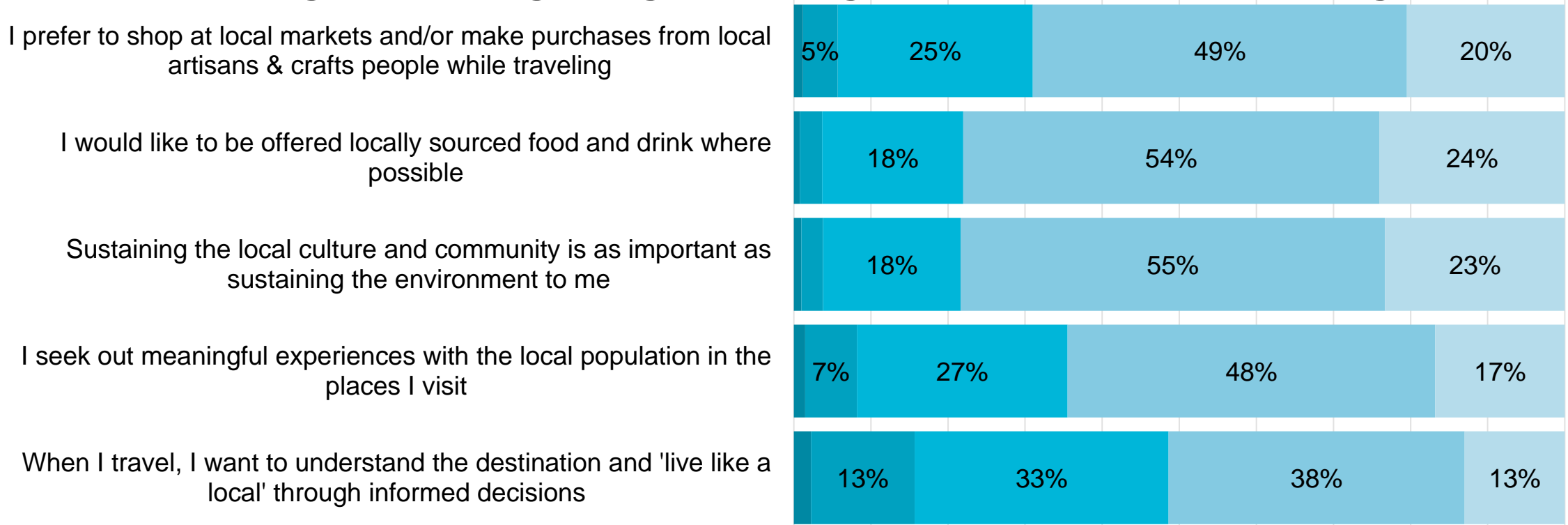


■ Strongly disagree
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 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=2,851

South Korea Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

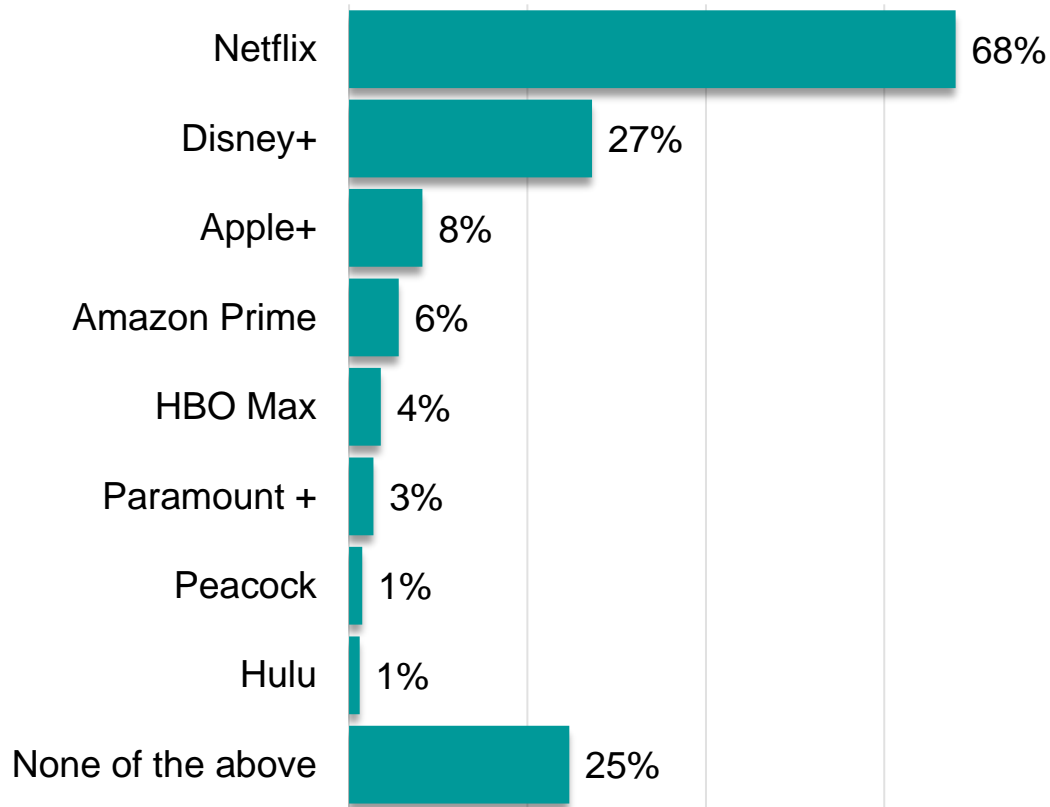


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

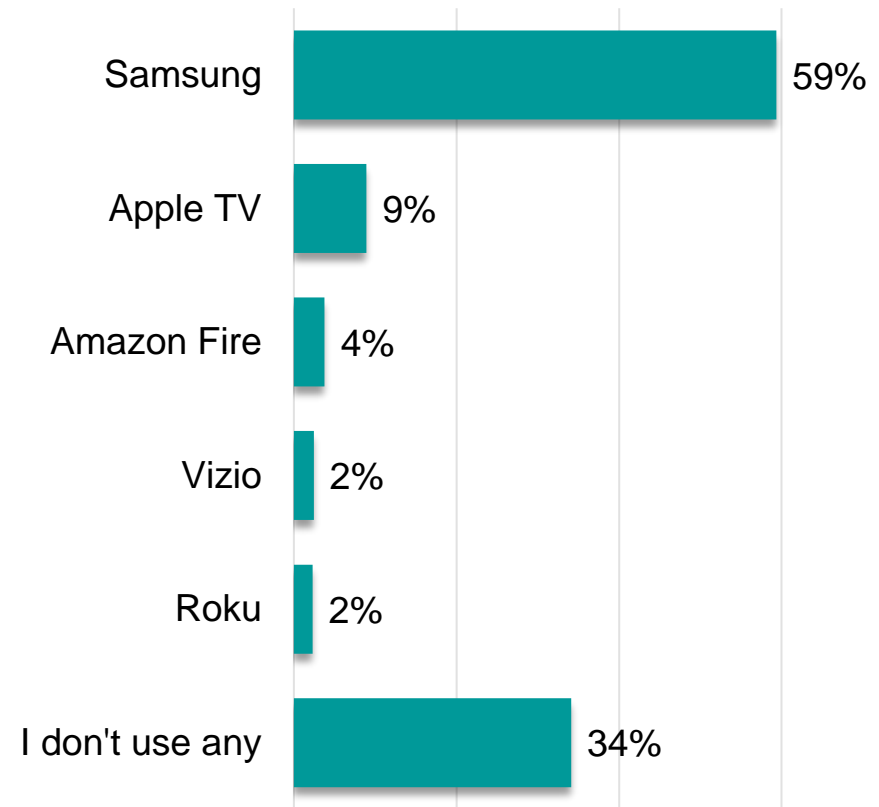
Sample Size: n=2,851

South Korea Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

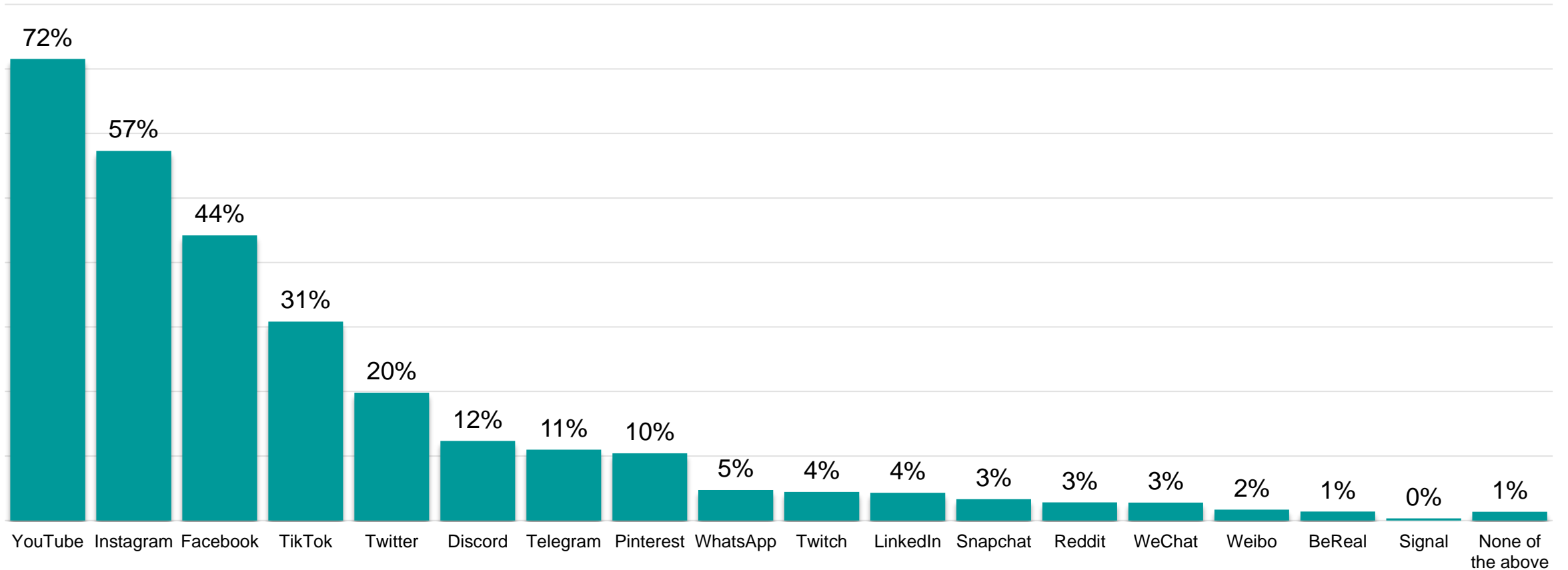


Sample Size: n=2,851

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=2,851

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	39%
Online	43%
Radio	4%
TV commercials	28%
Newspaper	6%
Friends/Family	43%
Social Media	37%
YouTube	67%
Out of Home Advertising (e.g., poster billboards, bus shelter advertisements, etc.)	7%
Email	7%
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	60%
I look up the destination on social media	40%
I talk to friends/family about the destination	44%
I book travel to the destination almost immediately	13%
I don't do anything	5%
None of the above	3%

Sample Size: n=2,851

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**