VISION INSIGHTS

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

January 24, 2025



STATE OF HAWAI'I • 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

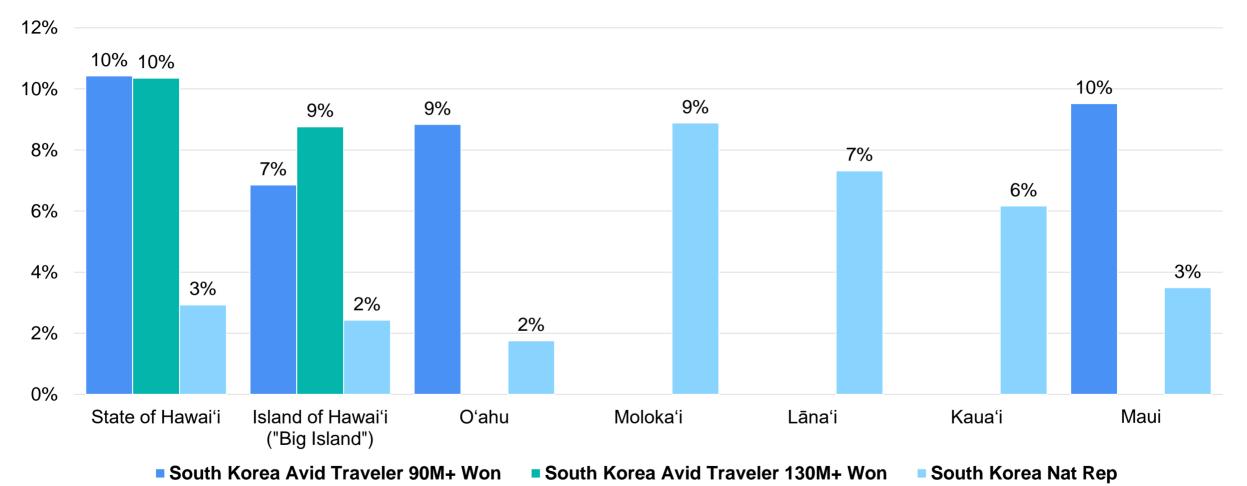
Nationally Representative Sample (Nat Rep)

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

Avid Traveler 130M+ Won

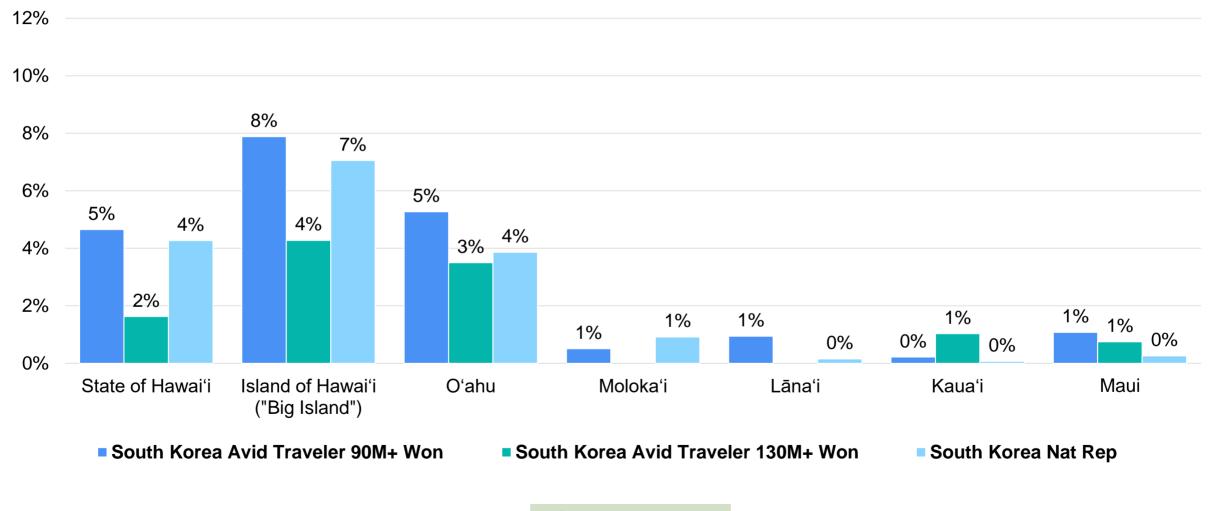
- Gross household income is 130M+ won
- Age is 25-54
- Either took an international vacation, very likely/likely to book a flight in the next 12 months, or visited any of the Hawaiian Islands in the past two years

South Korea - Leisure Trip in Past 12 Months



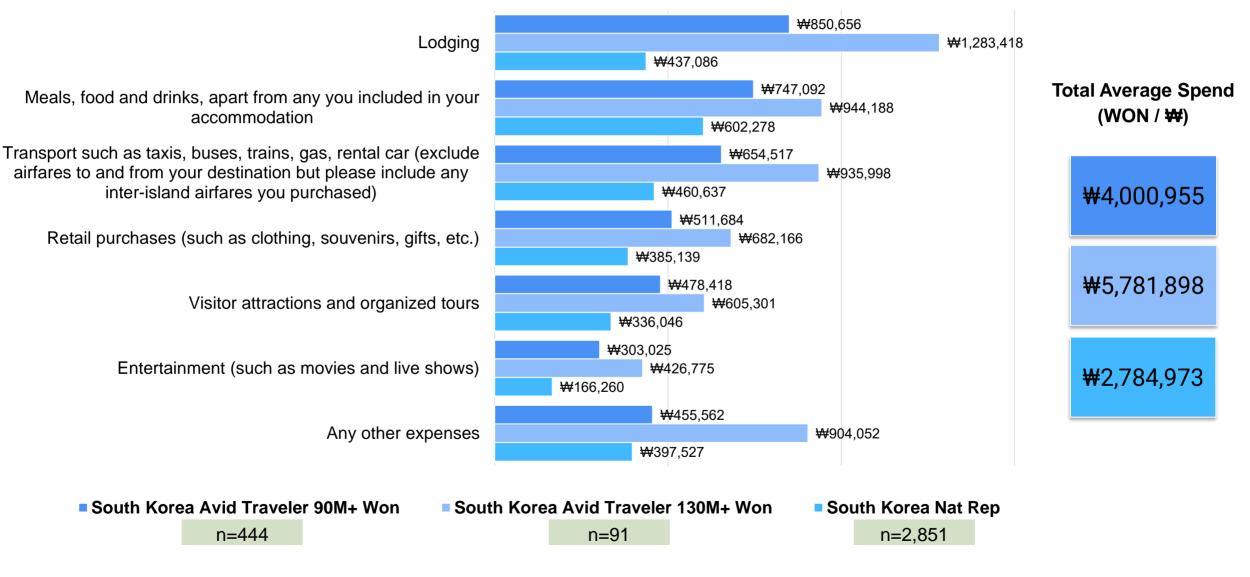
Sample Min. n=50

South Korea - Next Destination for Leisure Trip



Sample Min. n=50

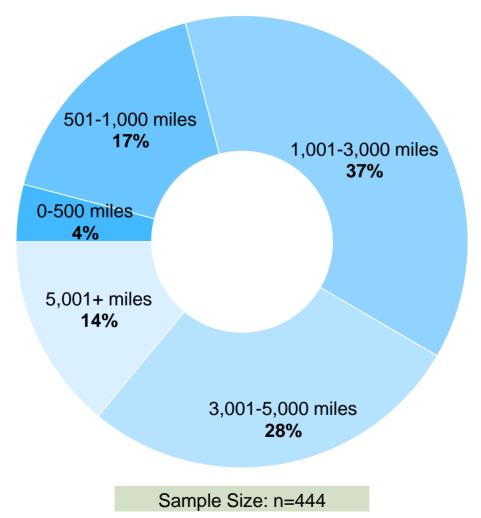
South Korea - Total Annual Holiday Spend



January 24, 2025 Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation in total for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

South Korea Avid Travelers 90M+ Won: Annual Vacation

Distance Travelled on Annual Vacation



How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation in total for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

January 24, 2025

South Korea Avid Travelers 90M+ Won: Annual Vacation

Sample Size: n=444

Average Spend

January 24, 2025

Lodging ₩850,656 Meals, food and drinks, apart from any you ₩747.092 included in your accommodation Transport such as taxis, buses, trains, gas, rental car (exclude airfares to and from your ₩654,517 destination but please include any inter... Retail purchases (such as clothing, souvenirs, ₩511.684 gifts, etc.) Visitor attractions and organized tours ₩478,418 Entertainment (such as movies and live shows) ₩303.025 Any other expenses ₩455.562

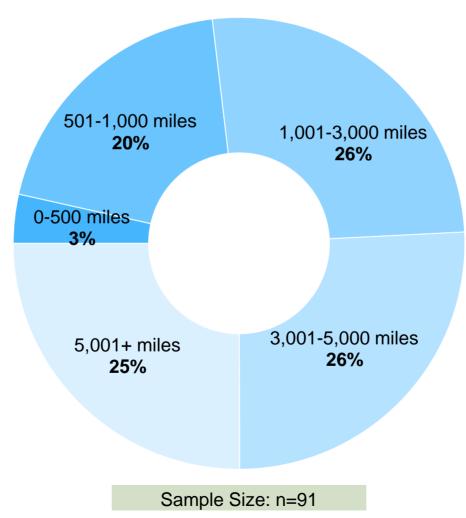
Spend Per Person Per Day $6_{-}5$ Ave # Nights on Annual Vacation 3.4Ave # of People on Annual Vacation ₩183,779

Ave. Per Person Per Day Spend

How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation in total for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

South Korea Avid Travelers 130M+ Won: Annual Vacation

Distance Travelled on Annual Vacation



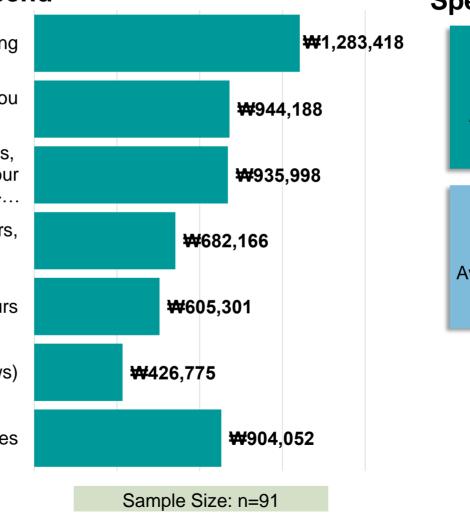
January 24, 2025 How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation **in total** for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

South Korea Avid Travelers 130M+ Won: Annual Vacation

Average Spend

Lodging Meals, food and drinks, apart from any you included in your accommodation Transport such as taxis, buses, trains, gas, rental car (exclude airfares to and from your destination but please include any inter... Retail purchases (such as clothing, souvenirs, ₩682,166 gifts, etc.) Visitor attractions and organized tours ₩605,301 Entertainment (such as movies and live shows) ₩426,775 Any other expenses

January 24, 2025



Spend Per Person Per Day

8.3 Ave # Nights on Annual Vacation 3.4 Ave # of People on Annual Vacation ₩203,969

Ave. Per Person Per Day Spend

How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation in total for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

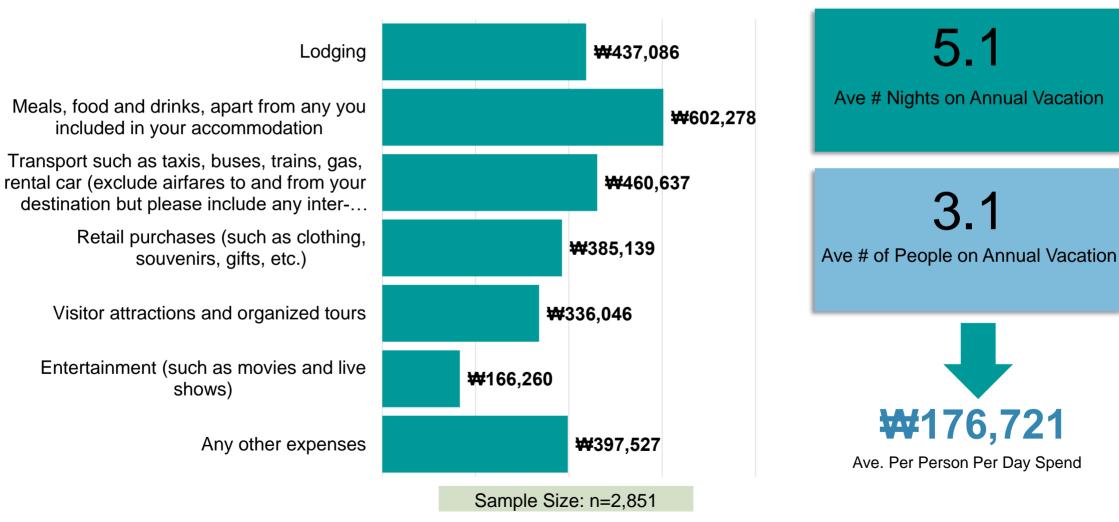
South Korea Nat Rep: Annual Vacation **Distance Travelled on Annual Vacation** 501-1,000 miles 28% 0-500 miles 21% 5,001+ miles 8% 3,001-5,000 miles 1,001-3,000 miles 12% 30% Sample Size: n=2,851

January 24, 2025 How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation **in total** for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

South Korea Nat Rep: Annual Vacation

Average Spend

Spend Per Person Per Day



How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation **in total** for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

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		

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?

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

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Г									
	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

3

∎4

Very Important 5

Sample Size: n=444

2

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 Hawai'i? Select all that apply

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

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									-
ſ									
	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

3

∎4

Very Important 5

Sample Size: n=91

2

South Korea Nat Rep: Importance of Travel Factors

ſ									
	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

3

■4

Very Important 5

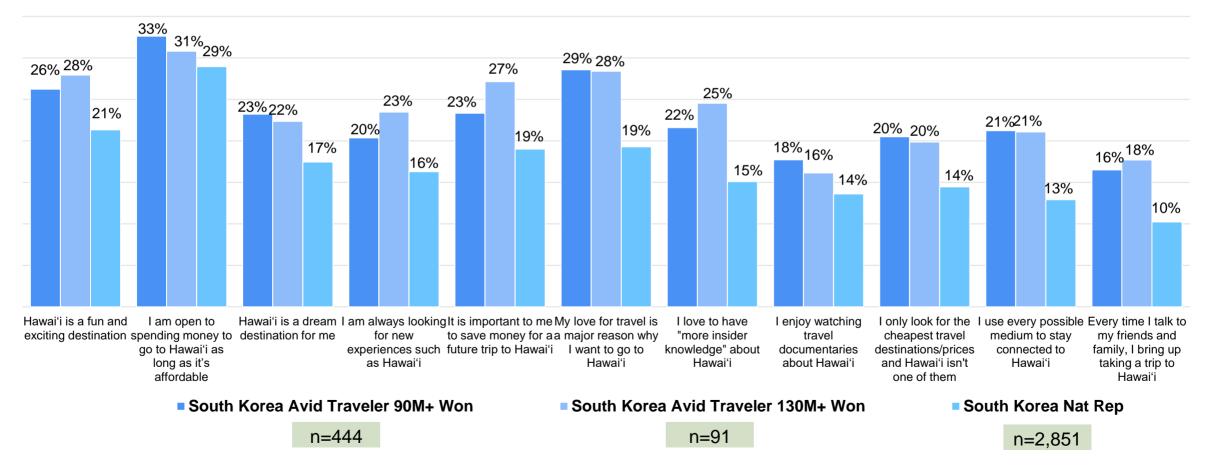
Sample Size: n=2,851

2

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

۱	6%	18%		49%		26%
÷	7%	21%		38%		33%
•	10%	24	%	41%)	23%
i	10%	21%)	47%		20%
i	10%	20%	6	44%		23%
i	9%	15%		47%		29%
i	8%	25%		45%		22%
i	15	%	26%		39%	18%
1	5% 11	%	26%	3	7%	20%
i	8%	26	%	429	%	21%
i	17	%	29%		35%	16%

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i as long as it's affordable Hawai'i is a dream destination for me I am always looking for new experiences such as Hawai'i It is important to me to save money for a future trip to Hawai'i My love for travel is a major reason why I want to go to Hawai'i I love to have "more insider knowledge" about Hawai'i I enjoy watching travel documentaries about Hawai'i I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them I use every possible medium to stay connected to Hawai'i Every time I talk to my friends and family, I bring up taking a trip to Hawai'i

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

n	17%		52%		28%
е	3	1%	34%	(31%
е	14%	30%	33%		22%
ʻi	8% 17%	6	50%		23%
ʻi	7% 11%	23%	31%		27%
ʻi	15%		53%		28%
ʻi	7% 20%	6	48%		25%
ʻi	15%	26%	39	1%	16%
n	8% 12%	25%	35%	6	20%
ʻi	<mark>6%</mark> 5%	25%	43%		21%
ʻi	9% 17%	6 28	%	28%	18%

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i as long as it's affordable Hawai'i is a dream destination for me I am always looking for new experiences such as Hawai' It is important to me to save money for a future trip to Hawai' My love for travel is a major reason why I want to go to Hawai' I love to have "more insider knowledge" about Hawai' I enjoy watching travel documentaries about Hawai I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them I use every possible medium to stay connected to Hawai' Every time I talk to my friends and family, I bring up taking a trip to Hawai'

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

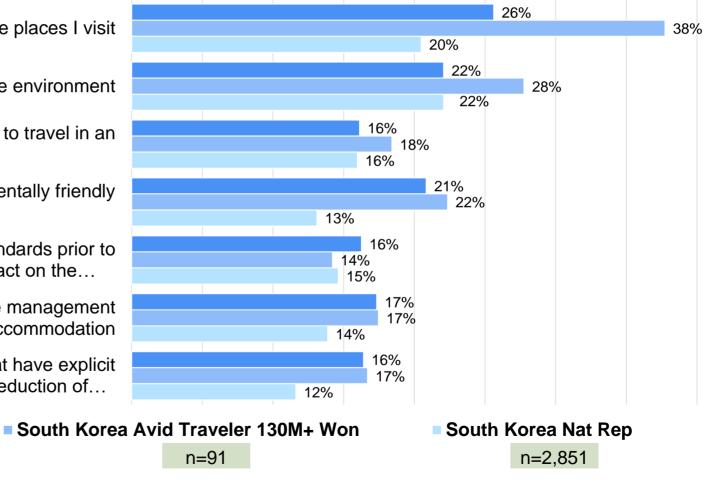
۱		22%	Į	52% 21%		%
•	1	17%	49%		29%	
;	9%	27%		44%	1	7%
i	6%	28%		49%		16%
i	7%	25%		47%	1	9%
i	6%	23%		51%	1	9%
i	6%	29%		49%		15%
i	11%	31	%	41%		14%
I	9%	33%		41%		14%
i	8%	31%		45%		13%
i	<mark>5%</mark> 1	17%	31%	3	6%	10%

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i as long as it's affordable Hawai'i is a dream destination for me I am always looking for new experiences such as Hawai'i It is important to me to save money for a future trip to Hawai'i My love for travel is a major reason why I want to go to Hawai'i I love to have "more insider knowledge" about Hawai'i I enjoy watching travel documentaries about Hawai'i I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them I use every possible medium to stay connected to Hawai'i Every time I talk to my friends and family, I bring up taking a trip to Hawai'i

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)



feel personal responsibility to take care of the places I visit

practice 'leave no trace' when traveling to protect the environment

care about the environment and take extra steps to travel in an environmentally responsible way

prioritize comfort and value for money over environmentally friendly 'green' practices

take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the...

would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation

would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of...



21

n=444

January 24, 2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

South Korea - Sustainability and Travel Responsibility Statements Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)

25% I prefer to shop at local markets and/or make purchases from local 38% artisans & crafts people while traveling 20% 28% I would like to be offered locally sourced food and drink where 35% possible 24% 24% Sustaining the local culture and community is as important as 21% sustaining the environment to me 23% 22% I seek out meaningful experiences with the local population in the 21% places I visit 17% 20% When I travel. I want to understand the destination and 'live like a 29% local' through informed decisions 13% South Korea Avid Traveler 130M+ Won South Korea Avid Traveler 90M+ Won South Korea Nat Rep n=2.851 n=444 n=91

January 24, 2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

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

Agreement Regarding Sustainable Practices While Traveling

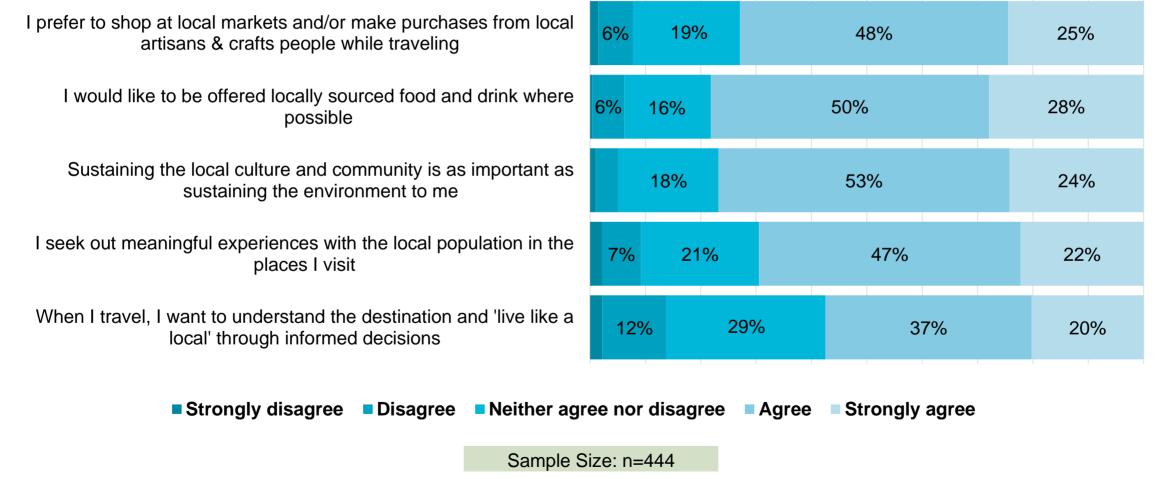
feel personal responsibility to take care of the places I visit	feel personal responsibility to take care of the places I visit 5% 15%		53%	26%
practice 'leave no trace' when traveling to protect the environment	5%	18%	54%	22%
care about the environment and take extra steps to travel in an environmentally responsible way	7%	25%	49%	16%
prioritize comfort and value for money over environmentally friendly 'green' practices	10%	26%	41%	21%
take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the environment/historic sites	6%	23%	54%	16%
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	9%	24%	47%	17%
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,	8%	319	<mark>%</mark> 42%	16%
Strongly disagree	ree no	r disagree	Agree Strongly agree	

Sample Size: n=444

23

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

Agreement Regarding Sustaining Local Culture While Traveling



24

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

25

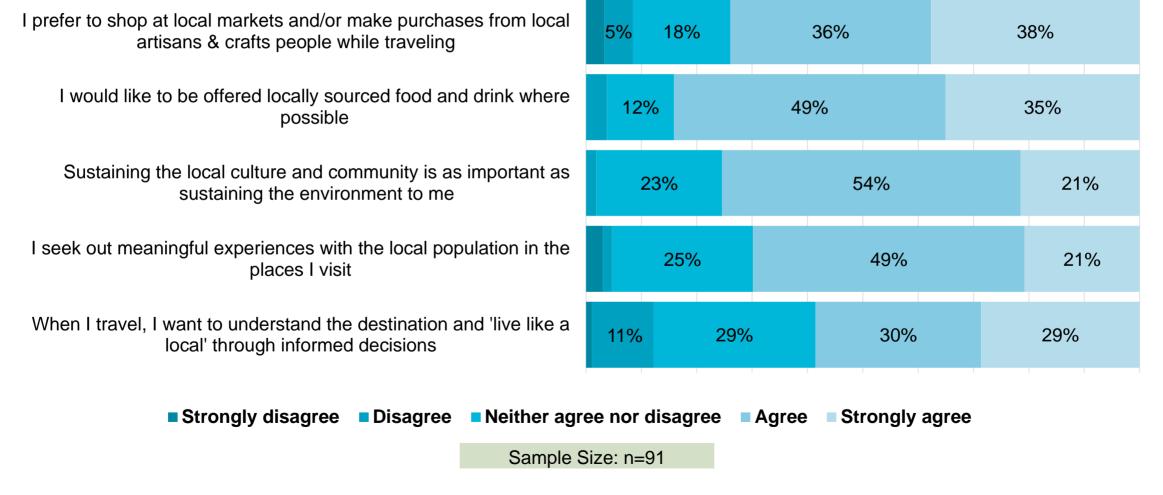
Agreement Regarding Sustainable Practices While Traveling

feel personal responsibility to take care of the places I visit	13%	40	6%	38%
practice 'leave no trace' when traveling to protect the environment	7%	19%	45%	28%
care about the environment and take extra steps to travel in an environmentally responsible way	10%	23%	45%	18%
prioritize comfort and value for money over environmentally friendly 'green' practices	11%	25%	39%	22%
take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the environment/historic sites	7%	22%	55%	14%
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	5% 7%	32%	38%	17%
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,	5% 8%	27%	43%	17%
Strongly disagree Disagree Neither ag	ree nor d Size: n=9		ee Strongly agree	9

January 24, 2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

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

Agreement Regarding Sustaining Local Culture While Traveling



January 24, 2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

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South Korea Nat Rep: Sustainability and Travel Responsibility Statements

27

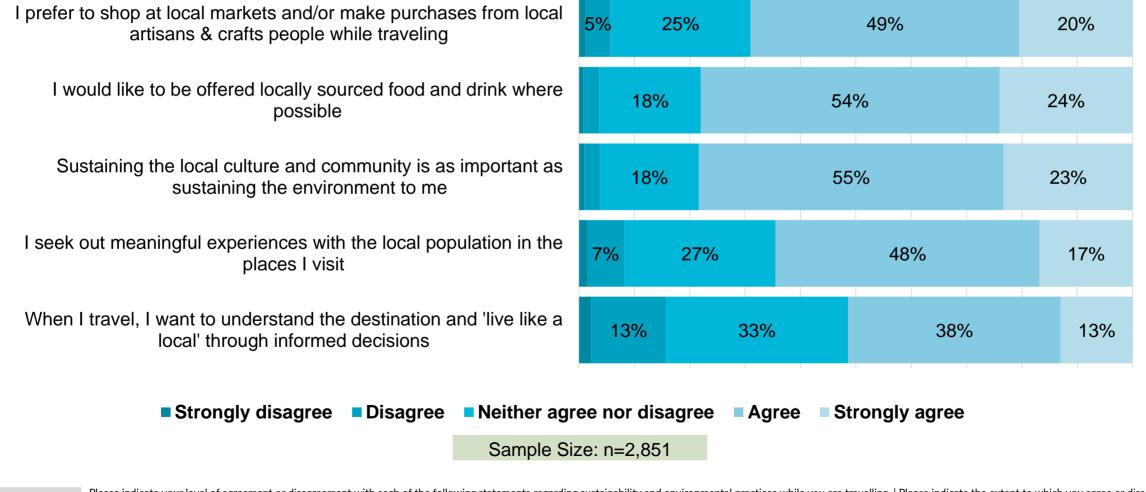
Agreement Regarding Sustainable Practices While Traveling

feel personal responsibility to take care of the places I visit	15%		60%	20%
practice 'leave no trace' when traveling to protect the environment	17%		57%	22%
care about the environment and take extra steps to travel in an environmentally responsible way	2	27%	52%	16%
prioritize comfort and value for money over environmentally friendly 'green' practices	11%	28%	46%	13%
take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the environment/historic sites	22	%	58%	15%
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	6%	26%	52%	14%
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,		34%	44%	12%
Strongly disagree		-	e Strongly agree	
Sample S	ize: n=2,85 ⁻	1		

January 24, 2025 Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

South Korea Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling



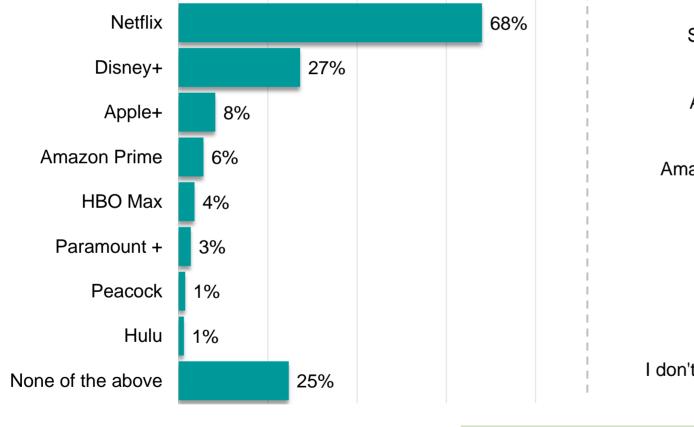
January 24, 2025

28

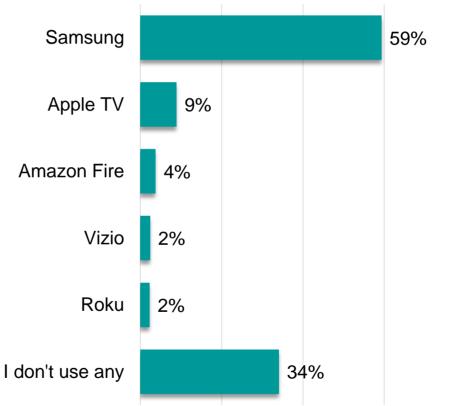
Please indicate your level of agreement or disagreement with each of the following statements regarding sustainability and environmental practices while you are travelling. | Please indicate the extent to which you agree or disagree with the following statements about sustainability of culture and community.

South Korea Media Consumption

Streaming Platforms Used Weekly



Connected Device Used



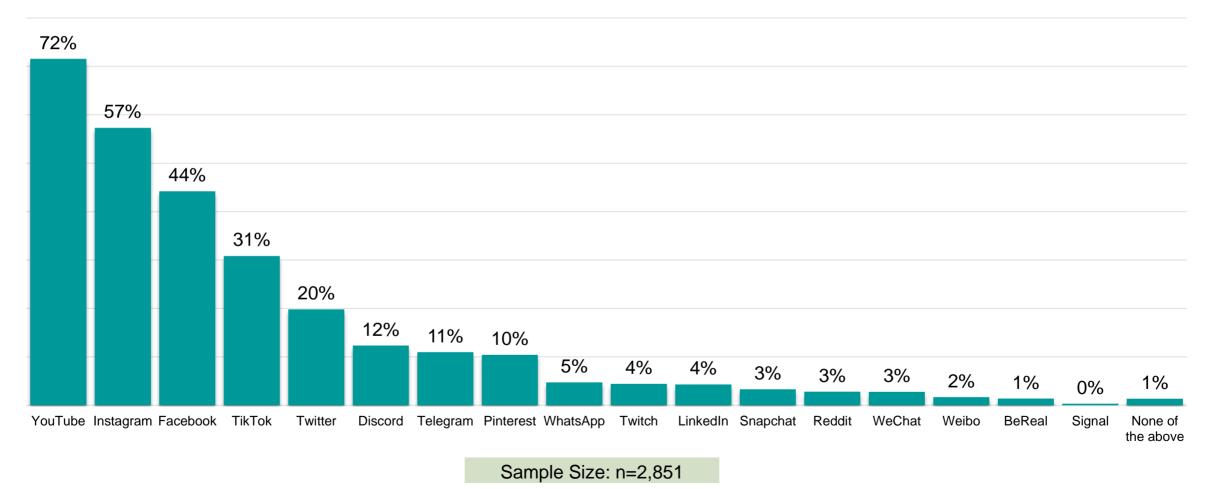
Sample Size: n=2,851

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**

29 January 24, 2025

South Korea Media Consumption

Social Media Platforms Used Weekly



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

39%
43%
4%
28%
6%
43%
37%
67%
7%
7%
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