



# The South Korean Traveller

Segmentation of the South Korean market

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## Background

Tourism Australia recognised a need to increase our understanding of South Korean travellers, which resulted in a ground up review in 2008. The main feature of this review was a major segmentation study of the outbound traveller market.

A key finding was that rigidly defined socio-demographic segmentation is much less relevant in South Korea than it used to be. Much like all other inbound markets, segmentation based on attitudes to life in general and tourism specifically, is considered more informative and therefore valuable for marketing purposes.

This fact sheet provides an in-depth profile of the different attitudinal segments and is one of a series of documents created to increase your understanding of long haul travellers in South Korea (for more information on the document suite, see the end of this document).

This fact sheet gives a detailed overview of the segments in this market and practical information profiling each group including:

- Demographic profiling of each segment
- Approach to long haul travel
- Perception of Australia
- What inspires them
- How to reach them in the media

- Timeline for planning their holidays and the sources they use when planning
- Travel profile
- Holiday activities of interest
- Long haul destinations that come into consideration

Not all the segments identified will be actively targeted by Tourism Australia's global marketing activities. Tourism Australia's global brand campaign is targeting a global communication segment called the Experience Seeker. Communications designed to appeal to the Experience Seeker will also motivate many of the segments identified in South Korea (for more information refer to the Experience Seeker fact sheets).

The information contained in this fact sheet provides important insight into the product/activity needs of specific segments including:

- Creating a strong and effective offer
- Crafting marketing messages for greatest effect
- Identifying segment specific marketing opportunities
- Optimising the effectiveness of communications plans
- Getting inspiration for new product ideas



## Segmentation helps us to:

### 1. Maximise the return on investment of our marketing activity

Segmentation helps us to identify segments in the South Korean market where the return on investment for our marketing dollar will be greatest. By profiling the market segments, we can identify which segments will be most receptive to what Australia has to offer, will provide the greatest yield, and are most likely to disperse. Our marketing activity can then be directed at those segments, rather than at the market as a whole to maximise the impact of our dollars.

### 2. Understand the composition of the market better

By segmenting the market we can understand the composition, or groups that exist in the South Korean travel market better. We begin to appreciate why travellers visit Australia and why they don't. We identify which travellers are most likely to come here, and which travellers won't. We learn how they plan and book their holidays, where

they get information, what they like to do on holiday and much more. All this information helps us to develop more effective marketing campaigns and more attractive tourism products.

### 3. Communicate more effectively to our target segments

Psychographically based segmentation is based upon the emotional and rational motivations that drive people's travel choices. It also provides us with insight into where the segments look for travel information and what media channels they pay most attention to. This information enables us to develop marketing communications campaigns that are specifically designed to reach our target segments and to communicate messages that they find powerful and motivating.

# What segments are there in the South Korean market?

There are many ways to segment a market: by life-stage, attitudes, needs, behaviours or just about any other consumer characteristic you can imagine. The best segmentations have these aspects in common:

- The segments are easy to identify and access in the marketplace;
- They are sufficiently large, valuable and distinct to justify a dedicated marketing strategy;
- The segments are sustainable over time

In this case, the segments were determined using two criteria: the horizontal axis indicating the level of experience in long haul travel; and the vertical axis indicating the respondent's preference towards challenging themselves when travelling. These two criteria were chosen as they were seen as core attributes of those likely to visit Australia.

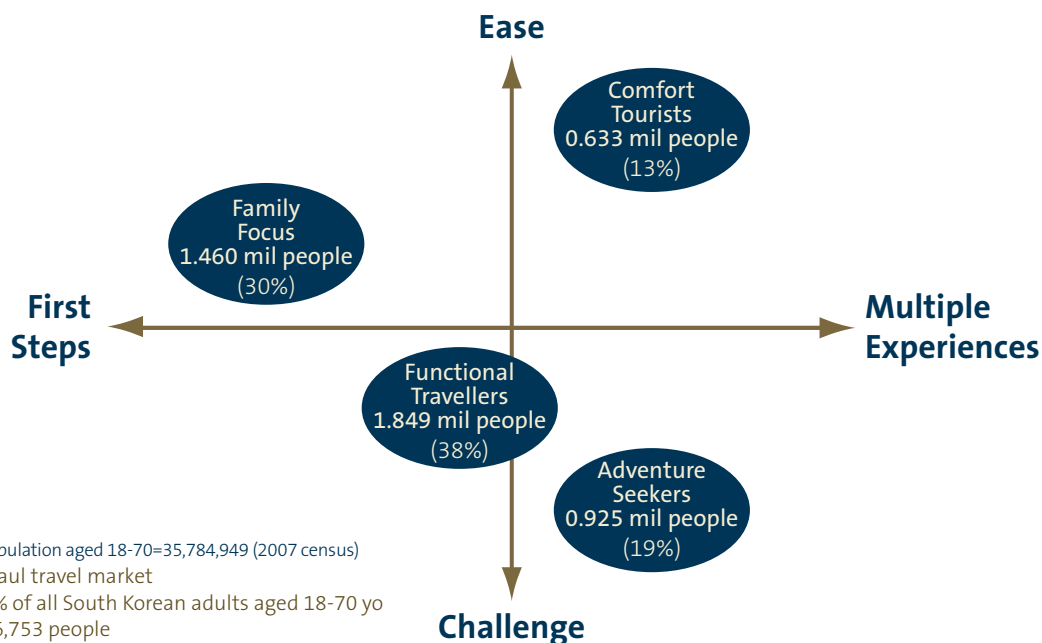
Given the various factors that come into consideration when choosing a travel destination, the position of each segment was determined using a combination of emotional, attitudinal and behavioural elements.

In segmenting the South Korean travel market we looked to develop a segmentation model that could provide the foundation for a full range of marketing programs and strategies including brand communications, media planning, promotions, public relations, product development and our international media programs.

Taking these factors into account, we identified four distinct segments in the South Korean long haul travel market:

- Adventure Seekers
- Family Focus
- Comfort Tourists
- Functional Travellers

These segments are distinguished by their travel experience on the one hand, and their attitudes to travel and the style of travel experience they seek on the other. We are also seeing evidence of life stage differences as we see a shift in the travel needs of South Koreans as the younger generation comes through. Almost every long haul traveller in South Korea can be allocated to one of the four segments identified in the research. Together, the four segments account for almost five million people.



Over the next few pages, is detailed information on the four segments, including the key characteristics that set each segment apart from the rest of the long haul market in South Korea.

# Adventure Seekers

*“I sort of become a different person on holiday, lose my inhibitions. Maybe it’s about being free to become the person I really am.”*

## Segment highlights

<b>Segment size</b>	925,000 long haul travellers/19 percent of the long haul market
<b>Experience Seeker Proportion</b>	Thirty five percent of Adventure Seekers are Experience Seekers. This is higher than the national average, where twenty four percent of long haul travellers are Experience Seekers.
<b>Heart of the segment</b>	World citizens travelling to learn and experience the diversity and adventure on offer outside Asia.
<b>Profile</b>	Compared to other long haul travellers in South Korea, Adventure Seekers: <ul style="list-style-type: none"><li>• Are more likely to be 18 to 34 years of age</li><li>• Are more likely to be single</li><li>• Are unlikely to have children</li><li>• Have the highest competency in the English language. They are more likely to have intermediate or fluent English skills</li><li>• Have a range of interests which are more likely to include travel, reading, architecture, art, literature and attending live performances and exhibitions</li></ul>
<b>Approach to long haul travel</b>	<p>Adventure Seekers consider themselves to be citizens of the world; Travel is about gaining an enlightened perspective. They love travelling and exploring new places, experiencing a different way of living and doing things they have never done before.</p> <p>They like to experience all a destination has to offer; famous landmarks as well as the less ‘touristy’ things.</p> <p>Adventure Seekers are well travelled and are looking to travel and discover the world at every opportunity. Twenty one percent indicate they have visited Australia. Furthermore, they are likely to have visited France, Italy, UK, Switzerland, Thailand as well as closer destinations such as Japan, China and the Philippines.</p>
<b>Australia as a destination</b>	<p>Australia is viewed very favourably by Adventure Seekers. It is seen to be a great place to visit with a vast array of experiences and activities for a traveller.</p> <p>The driving perception of Australia is of ‘untamed nature’ including the wildlife, deserts, nature, beaches and oceans.</p> <p>Adventure Seekers also perceive the Australian people to be laidback and friendly. They are keen to live as an Australian would and believe they would enjoy mixing with the locals and exploring the cities and local culture as well as a vast range of active experiences such as scuba diving, mountain biking, camping, four wheel drive trips and horseback riding.</p> <p>Australia is also well positioned among Adventure Seekers as a destination of choice for a working holiday and a safe destination to travel around.</p>
<b>What inspires them?</b>	<p>Adventure Seekers look for more than rejuvenation from a long haul holiday. They are more likely than the average Korean traveller to want to feel excited, alive and escape life in Korea. They want to experience different cultures, explore more of the world and experience something that is rare and special that they wouldn’t do in their everyday life.</p> <p>One of their core motivators is to challenge themselves and learn new things throughout their lives. This will satisfy their curiosity and understanding of the world as a whole. Their interest in stepping into the unknown and exploring new destinations and experiences drives their desire to travel. They are not averse to returning to destinations, but look to learn and develop personally from each travel experience they undertake.</p>

*“(Australia is) a place you can have adventures”*

*“Australia’s nature is not overwhelming – it’s accessible”*

*“I’ve been to Australia – it’s a totally different culture – I felt revitalized.”*

<b>How do I reach them in the Media?</b>	<p>Adventure Seekers media preferences include:</p> <ul style="list-style-type: none"><li>• They spend more time on the internet than the average South Korean traveller.</li><li>• In an average month, nine out of every ten Adventure Seekers would visit an online forum. read/write an online blog. Three in four would also buy music online.</li><li>• Four in every five Adventure Seekers would go to the cinema at least once a month.</li><li>• They spend less time watching television than the average South Korean traveller. When watching television, they are more likely to watch movies, documentaries, travel and holiday programs and comedies.</li><li>• On average, Adventure Seekers spend over two and a half hours a week reading newspapers. This is in line with the national average. They are more likely to read the travel, world news, business news and technology sections and less likely to read the sports section.</li></ul>
<b>Planning process</b>	<p>Adventure Seekers plan their holidays approximately one to two months in advance. They do a great deal of research and consider it the beginning of their journey.</p> <p>Core methods of conducting research include travel books, social networking and travel review websites as well as other online sources.</p>
<b>Travel Profile</b>	<p>On a long haul holiday, Adventure Seekers:</p> <ul style="list-style-type: none"><li>• Are more likely to travel independently or on customised packages</li><li>• Are more likely to travel with same sex friends</li><li>• They also travel with their spouse and other relatives</li><li>• They spend more on holidays than the average Korean traveller</li><li>• They are less likely to want to interact with other Korean travellers when travelling</li><li>• Are interested in staying in moderate hotels (two or three stars), Bed and Breakfasts and Guest Houses</li></ul>
<b>Holiday Activities</b>	<p>Adventure Seekers have a wide range of interests and are interested in a great number of activities when they travel. They enjoy a variety of fun and adventurous activities, preferably around exploring new places (particularly natural environments) and meeting new people; both locals and like minded travellers.</p> <p>Some of the activities that motivate Adventure Seekers more than other travellers include:</p> <ul style="list-style-type: none"><li>• Visiting famous landmarks</li><li>• Sampling local cuisine</li><li>• Visiting local markets</li><li>• Local events/festivals</li><li>• Meeting the locals/new people</li><li>• Attending live theatre/musical performances</li><li>• Exploring the backstreets of a city</li><li>• Enjoying the nightlife</li><li>• Adrenalin activities</li></ul>
<b>Long haul destinations (other than Australia) they would really like to visit/ seriously consider going to</b>	<p>Other long haul destinations of interest include:</p> <ul style="list-style-type: none"><li>• Turkey</li><li>• France</li><li>• Czech republic</li><li>• Spain</li><li>• USA</li><li>• Thailand</li><li>• Vietnam</li></ul>

# Family Focus

*“I like travelling because I can learn about different cultures, in a new environment. And I am especially happy if my children get the chance to practice speaking English.”*

## Segment highlights

<b>Segment size</b>	1.46 million long haul travellers/30 percent of the long haul market
<b>Experience Seeker Proportion</b>	Twelve percent of Family Focus travellers are Experience Seekers. This is half the national average; twenty four percent of long haul travellers in Korea are Experience Seekers.
<b>Heart of the segment</b>	Family connection and learning through travel
<b>Profile</b>	<p>Compared to other long haul travellers in South Korea, Family Focus travellers:</p> <ul style="list-style-type: none"><li>• Are an even mix of males and females</li><li>• Are more likely to be 35 to 49 years of age</li><li>• Are generally married with dependent children</li><li>• Have little to no understanding of the English language. A small proportion of this segment have intermediate English skills</li><li>• Have a range of interests which are more likely to include shopping, studying, surfing the internet, photography and spending time with their family</li></ul>
<b>Approach to long haul travel</b>	<p>For Family Focus travellers, travelling is about spending time as a family. Their day to day life is generally busy, not allowing them to spend considerable time together as a family unit. This is the primary purpose of holidays for this group.</p> <p>Long haul holidays, and holidays in general are about relaxing, having fun and doing things as a family. They are also seen as an important opportunity to enhance their children’s education. This can be achieved through educational experiences or as simply as providing their children with the opportunity to practice their English through ordering a meal.</p> <p>They look for destinations that are safe and are more driven by good value offers. They look for clean environments where the potential risks to their family’s health are less.</p> <p>Sixteen percent indicate they have visited Australia. Furthermore, they are likely to have visited France, Italy, and many short haul destinations including Japan, China, Hong Kong and the Philippines.</p>
<b>Australia as a destination</b>	<p>While Family Focus travellers have some interest in Australia, only sixteen percent of this segment have ever visited Australia;</p> <p>Australia is seen as a destination with unique native animals (koalas and kangaroos are two of the first things mentioned regarding Australia by Family Focus travellers), nature, clean air and pristine environment.</p> <p>It is perceived as a destination that would be nice to live in, however is a bit boring and an expensive destination to travel to. It also is perceived as lacking culture or heritage.</p> <p>Australia is also associated as a good destination for children with English language courses available, however the range of natural experiences is the main significant driver for visiting Australia for this segment; these experiences will be good for the learning and personal development of their children.</p>

*“I’d like to know what is different about each area, what makes it special.”*

<b>What inspires them?</b>	<p>Family Focus travellers look for rejuvenating family holiday experiences. They want to feel happy, comfortable, relaxed and carefree when it comes to holidays.</p> <p>They want to experience different cultures, explore more of the world while spending time with their family and relaxing. They are also inspired to pursue educational opportunities for their children. Long haul holidays should be a life enriching experience.</p>
<b>How do I reach them in the Media?</b>	<p>Family Focus travellers media habits are consistent with the average Korean traveller. They spend almost as much time per week on the internet as they do watching television.</p> <ul style="list-style-type: none"><li>• They spend slightly more time reading the newspaper and are more likely to read the national news section. They are also more likely to read the sports and business news sections of the newspaper.</li><li>• They spend approximately 12 hours per week watching television. They are significantly more likely to watch news and sports programs than other travellers.</li></ul>
<b>Planning process</b>	<p>Family Focus travellers plan their holidays further in advance than the average Korean traveller. They begin the planning process six to twelve months prior to travelling.</p> <p>Their children play an important role in recommending destinations and experiences. This drives the planning process for Family Focus travellers.</p> <p>Word of mouth recommendations are regarded highly among this group. Other research and planning sources include internet search engines and travel sites.</p>
<b>Travel Profile</b>	<p>On a long haul holiday, Family Focus travellers:</p> <ul style="list-style-type: none"><li>• Are more likely to travel on all inclusive groups tours or on customised package tours</li><li>• Travel with their immediate family; spouse and children</li><li>• They spend more per night than the average Korean traveller</li><li>• Are more interested in staying in moderate to luxury hotels (two or three stars)</li></ul>
<b>Holiday activities</b>	<p>Family Focus travellers enjoy a wide variety of activities when on holidays with a mix of educational and rejuvenating experiences. The needs of their children and their education (both schooling and growth as individuals) drive the need for a wide range of activities when holidaying.</p> <p>They are significantly more likely to be interested in:</p> <ul style="list-style-type: none"><li>• Visiting historical places</li><li>• Activities for children</li><li>• Spending time with their family and friends</li><li>• Relaxing by the beach or pool</li><li>• Visiting museums or art galleries</li><li>• Visiting family at the destination</li></ul> <p>They are less likely to be interested in enjoying the nightlife of a destination and adventure activities.</p>
<b>Long haul destinations (other than Australia) they would really like to visit / seriously consider going to</b>	<p>Other long haul destinations of interest include:</p> <ul style="list-style-type: none"><li>• UK</li><li>• Switzerland</li><li>• Germany</li><li>• France</li><li>• Italy</li></ul>

# Comfort Tourists

*“Now that I am getting older, I want more comfort because I don’t have the stamina.”*

*“You need a guide to have a relaxing trip – you cant have a low budget, relaxing trip.”*

## Segment highlights

<b>Segment size</b>	633,000 long haul travellers/13 percent of the long haul market
<b>Experience Seeker Proportion</b>	Eleven percent of Comfort Tourists are Experience Seekers. This is less than half the national average; twenty four percent of long haul travellers in Korea are Experience Seekers.
<b>Heart of the segment</b>	It’s time for me to see the world!
<b>Profile</b>	Compared to other long haul travellers in South Korea, Comfort Tourists: <ul style="list-style-type: none"><li>• Are more likely to be female</li><li>• Are a range of ages, however are more likely to be over 50 years of age</li><li>• Are generally married with older children</li><li>• Are less likely to have any English language skills</li><li>• Have a range of interests which are more likely to include exercising, golf, table tennis, cooking and photography</li></ul>
<b>Approach to long haul travel</b>	<p>Comfort Tourists are travellers who are yet to experience the world and are keen to see as much as they can in the time they have.</p> <p>They are not confident in new places. They are less interested in the unknown and more interested in seeing the famous sites. Long haul travel is about wanting to feel comfortable, happy, indulged and exhilarated. They are very happy to consider themselves tourists and are eager to see and learn more about the world. They get a sense of enjoyment out of relaxing and experiencing a well researched and planned holiday.</p> <p>They are motivated to experience different cultures, world renowned natural wonders and experience environments that are rare and special.</p> <p>They look for destinations that are safe and are more influenced by the threat of terrorism when planning a holiday than the average South Korean traveller. They also feel more comfortable with a guide to help them communicate. This is one of the reasons why they prefer group travel.</p> <p>Eighteen percent indicate they have visited Australia. Furthermore, they are likely to have visited France, Italy, as well as short haul destinations including Japan and China.</p>
<b>Australia as a destination</b>	<p>Australia is seen to be a relatively safe destination with friendly and laid back people. It is renowned for its clean air and unpolluted and preserved nature.</p> <p>It is perceived as a unique destination with a range of wildlife and habitats that are not found elsewhere.</p> <p>While it is considered expensive to get to, the landmarks, beaches and cities appeal to Comfort Tourists as well as the opportunity to visit friends who live there. The high expense associated with travelling to Australia means they are more likely than other travellers to visit Australia and New Zealand in the same trip to ensure they see as much as possible in the one holiday experience.</p>

*“I believe escaping from the ordinary life with close friends and relaxing/experiencing something new is a holiday.”*

*“(Australia has) Clean air and unpolluted, preserved nature.”*

<b>What inspires them?</b>	<p>Comfort Tourists want to visit destinations that they view to be rare and special. They are inspired by world renowned natural wonders and the opportunity to experience different cultures and a world different to their everyday life.</p> <p>They want to feel comfortable and happy in their surroundings while achieving a sense of indulgence and exhilaration that separates these experiences from their life in Korea. They feel this is achieved through experiencing different cultures, meeting new people and visiting iconic locations.</p>
<b>How do I reach them in the Media?</b>	<p>Comfort Tourists are higher than average television viewers. One in four watches more than 20 hours of television a week. This is significantly higher than the average traveller at less than 15 hours a week.</p> <ul style="list-style-type: none"><li>• When watching television, they are slightly more likely to watch news, entertainment and soap operas and less likely to watch movies.</li><li>• Their newspaper consumption is consistent with other travellers, however they are more likely to read the travel and weather sections and are less likely to read the opinion pages.</li><li>• Two in five Comfort Tourists do not read magazines at all and have never uploaded any pictures to a website. Almost thirty percent have never visited a social networking site.</li></ul>
<b>Planning process</b>	<p>Comfort Tourists plan their holidays closer to their departure date than the average Korean traveller; only one to two months in advance.</p> <p>They are more likely driven by packages that meet their needs. When planning and researching their holiday they use the internet as well as travel agents and tour operators. They also value the importance of traditional travel agent brochures.</p> <p>Word of mouth recommendations from colleagues and friends are valued highly. They are also more likely to be interested in destinations they are hearing a lot about.</p>
<b>Travel Profile</b>	<p>On a long haul holiday, Comfort Tourists:</p> <ul style="list-style-type: none"><li>• Are more likely to travel with same sex friends or business associates</li><li>• Are more likely to travel on all inclusive guided groups tours</li><li>• They spend more per night than the average Korean traveller</li><li>• Are more interested in staying at high end hotels and resorts</li></ul>
<b>Holiday activities</b>	<p>Comfort Tourists enjoy a range of activities while on holiday, centring on enjoying the full range of experiences a destination has to offer, particularly culture, nature and self-exploration activities. It is about visiting all the famous sites of a destination for Comfort Tourists.</p> <p>They are significantly more likely to be interested in:</p> <ul style="list-style-type: none"><li>• Visiting famous landmarks and tourist sites</li><li>• Visiting local markets</li><li>• Trying new food / sampling local cuisine</li><li>• Dining at top restaurants</li><li>• Visiting historical places</li><li>• Visiting natural world heritage sites</li><li>• Visiting national parks and gardens</li></ul> <p>They are less likely to be interested in mixing with the locals or making new friends.</p>
<b>Long haul destinations (other than Australia) they would really like to visit / seriously consider going to</b>	<p>Other long haul destinations of interest include:</p> <ul style="list-style-type: none"><li>• USA</li><li>• Thailand</li><li>• France</li><li>• Italy</li><li>• Indonesia</li></ul>

# Functional Travellers

*“You go to Europe, USA and then Australia – it’s an unspoken rule!”*

## Segment highlights

<b>Segment size</b>	1.9 million long haul travellers/38 percent of the long haul market
<b>Experience Seeker Proportion</b>	Thirty two percent of Functional Travellers are Experience Seekers. This is substantially higher than the national average; twenty four percent of long haul travellers in Korea are Experience Seekers.
<b>Heart of the segment</b>	Holidays provide a sense of relaxation and an opportunity to enjoy new experiences outside of their daily routine without the stress involved of planning it themselves.
<b>Profile</b>	<ul style="list-style-type: none"><li>• Compared to other long haul travellers in Korea, Functional Travellers:</li><li>• Are more likely to represent the demographics of the overall Korean adult population</li><li>• Are slightly more likely to be male</li><li>• Are more likely to be married and have children</li><li>• Are more likely to have a University education</li><li>• Are very career oriented, though family are an important aspect of their life</li><li>• Are less concerned with saving money at this point in their lives</li><li>• Have basic to intermediate English skills. One in five speaks no English</li><li>• Are often devout Christians</li><li>• Have a range of interests including movies, architecture, swimming, reading, socialising and health products</li></ul>
<b>Approach to long haul travel</b>	<p>Functional Travellers are very pragmatic when it comes to travel. They like to enjoy new destinations, but are not averse to returning to past holiday destinations either. They like to visit places that give them the opportunity to experience something different and have a bit of an adventure. It is important not to miss out on anything when they travel, hence their interest in organised group travel.</p> <p>They are relatively experienced travellers, however look for good value holiday experiences with a range of activities. They are less interested in seeing more of the world and experiencing different cultures and more interested in challenging themselves, having an adventure, getting off the beaten track and bringing back stories to share.</p> <p>Functional Travellers represent thirty eight percent of the Korean long haul travel market and are more likely than the average Korean traveller to be Experience Seekers. Previous destinations they have visited centre around North and South East Asia, however they are keen to visit Europe and other long haul destinations.</p>

*If it wasn't for the cost and Australia being so far away, I'd have visited already. I've considered it, but it costs more than Europe."*

#### Australia as a destination

Overall, Australia is viewed quite favourably among Functional Travellers, however it appears there is less emotional appeal for this group than other segments. This is consistent with the overall outlook of Functional Travellers.

Australia is seen as relatively isolated and a destination that requires more than two weeks for a holiday. Despite this, twenty percent of Functional Travellers have visited Australia, on par with Adventure Seekers.

Functional Travellers associate Australia with clean air, green grass, and our coastline (including cruise ships and water sports). They are also aware of Australia's beef and cattle ranches, sheep wool products and health products including health foods and natural products.

Despite the limited emotional appeal of Australia to this segment, knowledge is relatively broad. It is seen as a destination to relax and visit tourist centres as well as experiencing native wildlife. Destinations such as Hobart and Broome are more well known among Functional Travellers than other segments of the Korean long haul travel market.

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#### What inspires them?

Functional Travellers are less inspired by the concept of travel than other long haul travellers. They are relatively experienced travellers however appear to be less engaged by the romance of travel, and more likely to go with the flow.

They are interested in having a great holiday, seeing interesting things and doing activities different to their daily life. They are less emotionally driven by travel and are more pragmatic about the functional benefits associated with having a holiday.

Functional Travellers are however somewhat motivated by status. Travel can help them achieve a dream or lifetime goal.

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#### How do I reach them in the Media?

Functional Travellers appear to be less influenced by communications in general than the average South Korean traveller. They are more driven by price and the practicalities of a holiday.

- Their usage of newspapers is consistent with other Korean travellers, however they are less likely to read the travel section. The most popular section of the newspaper among this segment is the National News section.
- They watch television and use the internet slightly less than other long haul travellers, however still do both on average approximately ten hours per week. The most popular television programs among this group are movies, while they are less likely to watch news, documentaries, sports and travel programs.
- Two in three Functional Travellers watch Pay television and upload pictures to websites while one in two upload videos to sites such as You Tube

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#### Planning process

Functional Travellers generally plan their holidays one to two months in advance. They research information in a similar fashion to other South Korean travellers, although they are slightly less likely to use the internet and travel books when planning their holidays.

Functional Travellers are also quite price sensitive and are more likely to use email updates from airlines when planning holidays.

When booking their holiday, this segment uses various methods, however tend to prefer all inclusive group tours. Their decision as to which tour to choose is generally based around the ones that have the most activities in the available time.

*“I want to go to the UK because a lot of people I know have been there, the Queen, Buckingham Palace, the rain, I want to experience that first hand.”*

**Travel Profile**

When on a long haul holiday, Functional Travellers:

- Are more likely to travel with their family. If they have dependent children they are likely to travel with them also
- They spend less on holidays than the average South Korean traveller and are more likely driven by value offers rather than specific destinations and experiences.
- Stay in a wide range of accommodation types, however are most likely to stay in moderate to luxury accommodation
- They are more likely to return to familiar destinations, want to relax on holiday and want activities to be organised for them, thus avoiding the need to organise things themselves.

**Holiday activities**

When planning a holiday, Functional Travellers are less likely to plan their holidays around specific activities than other South Korean travellers. Their holidays are more likely to be motivated by having a great holiday that contrasts the experiences they have with their everyday life. Some of the more motivating holiday experiences include:

- Visiting famous/historic landmarks
- Photography
- Sampling the local cuisine
- Visiting natural wonders

**Long haul destinations (other than Australia) they would really like to visit / seriously consider going to**

Other long haul destinations of interest include:

- Western Europe
- Japan
- France
- Thailand



## Identifying Australia's most valuable target markets

Of the four segments identified in the South Korean travel market, Adventure Seekers, Family Focus and Functional Travellers are the segments specific to this market that Tourism Australia has identified as core targets.

The very nature of the South Korean travel market indicates a generational shift from group to free independent travel (FIT). While many travellers within these groups still rely on partially or fully organised group travel, the increasing number of English speaking travellers and FIT as well as the yield of these segments indicate they are of considerable value within the South Korean long haul travel market.

These three segments clearly have the greatest potential to generate income for Australian tourism and deliver a good return on our marketing investment. In addition, these three segments have the greatest potential to travel to Australia in the short to medium term.

For all these reasons, Tourism Australia believes Adventure

Seekers, Family Focus and Functional Travellers to be the most suitable target segments in the Korean market to achieve sustainable growth in Australian tourism.

There is the opportunity to bridge current barriers and enhance the drivers exhibited by all segments by working with the industry to provide higher quality stand alone customised tours of Australia (that do not include New Zealand). This will assist in creating greater interest among consumers, as well as reaching the other Korean long haul traveller segment; Comfort Tourists.

Comfort Tourists will still visit Australia and may well be appropriate targets for parts of the Australian tourism industry. Any inroads made to the broader South Korean market (and identified target segments) will have additional benefits in reaching Comfort Tourists.

# Further information

This document is one component of a suite of documents Tourism Australia has produced for the South Korean target market.

To understand the global communications target market that Tourism Australia is concentrating on, please refer to:

- *Australia's global communications target: the Experience Seeker*

For more information on how the Experience Seeker communications target relates to the South Korean segmentation information in this document, please refer to:

- *Experience Seekers in South Korea – understanding Experience Seekers in the Korean market*

These documents are available on the Tourism Australia website. Moreover, for any further information you require, please visit the Tourism Australia website at: [www.tourism.australia.com](http://www.tourism.australia.com), or contact your local Tourism Australia office.

## AUSTRALIA

### Sydney

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