TRAVELLER SNAPSHOT
SOUTH KOREA

TOURISM AUSTRALIA

MARKET OVERVIEW

South Korea remains a steady inbound market for Australia and market share continues to improve year-on-year.

VISITATION AND SPEND*

288,000	Arrivals at YE Dec 2018
58%	First time visitors
21	Flights per week
$1.5bn	Visitor spend at YE Dec 2018
$5,800	Average spend per trip
39	Average nights stayed

*visit tourism.australia.com for latest statistics

MARKET OPPORTUNITY

7m

Estimated number of High Value Travellers (HVTs)**

Representing

~43%

of the total out of region travel market

**see additional HVT factsheet for more information

MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE

- #1 Nature & wildlife
- #2 Safety & security
- #3 Food & wine
- #4 Value for money
- #5 History & heritage

AUSTRALIA'S PERFORMANCE

NATURE & WILDLIFE

Australia (#1)	52%
Switzerland	48%
Hawaii	47%
New Zealand	42%
Maldives	39%

AQUATIC & COASTAL

Hawaii	46%
Australia (#2)	42%
Maldives	39%
Caribbean	36%
Indonesia	29%

FOOD & WINE

France	47%
Italy	44%
Thailand	28%
Vietnam	27%
Australia (#7)	22%

DEMAND FOR AUSTRALIA

DESIRABILITY

Unprompted responses

Hawaii	12%
Australia (#2)	8%
Switzerland	7%
Europe	7%
USA	6%

FASHIONABILITY

Unprompted responses

USA	25%
Hawaii	23%
France	20%
Italy	19%
Australia (#5)	16%

CONSIDERATION

Prompted response list

Australia (#1)	27%
Hawaii	25%
France	24%
Italy	23%
Switzerland	23%

INTENTION

Prompted response list

Vietnam	17%
Australia (#2)	14%
Hawaii	12%
Thailand	11%
USA	10%

PLANNING AND BOOKING BEHAVIOUR

LEAD TIME

PLAN

45% plan their trips

3-6 months prior

BOOK

48% book their trips

1-2 months in advance

TRAVEL

Peak travel season

Dec - Mar

BOOKING SOURCES

ONLINE VS OFFLINE

68% use one or more online booking sources

44% use one or more offline booking sources

DIRECT VS INDIRECT

41% use one or more direct booking sources

75% use one or more indirect booking sources

Source: Tourism Australia's Consumer Demand Project July 2018. Australian Bureau of Statistics, Overseas Arrivals and Departures, December 2018. Tourism Research Australia, International Visitor Survey, December 2018. Department of Infrastructure and Regional Development, December 2018

HIGH VALUE TRAVELLER SNAPSHOT
SOUTH KOREA

TOURISM AUSTRALIA

MARKET OVERVIEW

South Korea remains a steady inbound market for Australia and market share continues to improve year-on-year. High Value Travellers (HVTs) represent approximately 49% of South Korea's out of region travel market.

HVT DEFINITION

Travel long haul

Preference for Australia

Key drivers of destination choice

Represent high value

CURRENT MARKET

0.3m

Total arrivals at YE Dec 2018

~1 in 3 of these visitors are HVTs

2-3x more spend than average travellers

MARKET OPPORTUNITY

7m

High Value Travellers in South Korea

2.5m considering Australia in the next four years

4.5m not considering Australia in the next four years

MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE

- #1 Nature & wildlife
- #2 Food & wine
- #3 Safety & security
- #4 History & heritage
- #5 Value for money

AUSTRALIA'S PERFORMANCE

NATURE & WILDLIFE

Australia (#1)	**67%**
Hawaii	59%
Switzerland	54%
New Zealand	52%
Canada	44%

AQUATIC & COASTAL

Australia (#1)	**63%**
Hawaii	59%
Caribbean	41%
New Zealand	41%
Maldives	39%

FOOD & WINE

France	52%
Italy	48%
Australia (#3)	**39%**
Hawaii	32%
Thailand	32%

TRAVEL ATTRIBUTES

AUTHENTICITY

84%

seek authentic experiences through the local culture and getting a taste of everyday life.

OPEN-MINDED

88%

travel to become more openminded and knowledgeable about the world they live in.

PURPOSEFUL

65%

look for purposeful travel where it allows them to give back to the destination they visit.

FASHIONABILITY

83%

seek destinations that are fashionable and cool.

PLANNING AND BOOKING BEHAVIOUR

LEAD TIME

PLAN

53% plan their trips

3-6 months Prior

BOOK

49% book their trips

1-2 months in advance

TRAVEL

Peak travel season

Dec-Mar

BOOKING SOURCES

ONLINE VS OFFLINE

70% use one or more online booking sources

46% use one or more offline booking sources

DIRECT VS INDIRECT

42% use one or more direct booking sources

79% use one or more indirect booking sources

Source: Tourism Australia's Consumer Demand Project July 2018. Australian Bureau of Statistics, Overseas Arrivals and Departures, December 2018. Tourism Research Australia, International Visitor Survey, December 2018. Department of Infrastructure and Regional Development, December 2018