

# Consumer Demand Project 2019 South Korea Market Fact Sheet



## Current South Korean Visitation and Expenditure in Australia<sup>1</sup>

South Korean visitation to Australia declined by 10.0 per cent in the year ending September 2019 to 250,000. During the same time period, spend in Australia by South Korean visitors was down by 6.9 per cent to \$1.1b, while nights decreased by 7.3 per cent.



**\$1.1b** spend  
-6.9% year-on-year



**250,000** visitors  
-10.0% year-on-year



**10.2m** nights  
-7.3% year-on-year

## Factors of importance when choosing holiday destination

South Koreans consider world-class natural beauty and wildlife extremely important when choosing a holiday destination – with 65 per cent citing it among their top five importance factors, compared to 49 per cent of all travellers surveyed.

### Top five importance factors

% ranking each factor in their top five most important



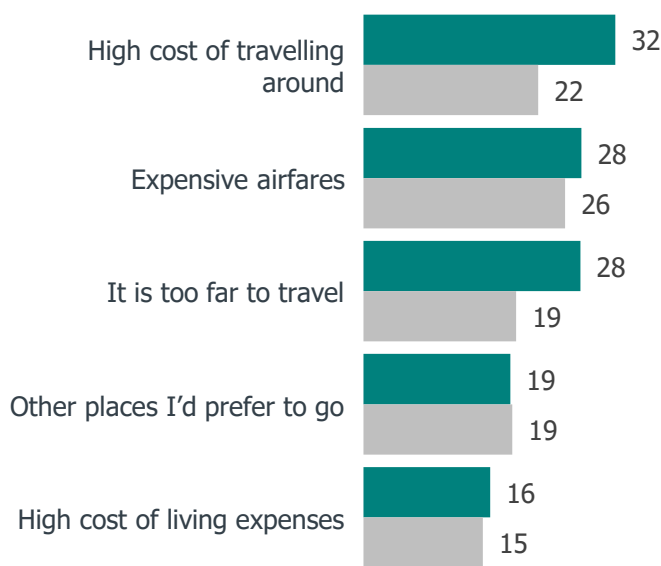
% South Korean travellers (%) 11 Market total<sup>2</sup>

## Barriers to visiting Australia

Compared to the 11 market total, South Koreans are more likely to consider cost as a barrier to visiting Australia, particularly the high cost of travelling around and within Australia. They are also more likely than the market total to consider Australia too far to travel.

### Top five Barriers to visiting Australia

% of those not intending to visit Australia



■ South Korean travellers ■ 11 Market total<sup>2</sup>

## Research Background

The Consumer Demand Project (CDP) has been run annually by Tourism Australia since 2012. This involves a large sample survey conducted in each of Australia's core international markets, focusing on key demand drivers, travel behaviours and preferences, purchase funnel and brand health metrics. Beginning in 2016, Tourism and Events Queensland and other State Tourism Organisations (STOs) have partnered with Tourism Australia for the project.

Source: Tourism Research Australia Consumer Demand Project (CDP) 2019

<sup>1</sup> Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)

<sup>2</sup> Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

# Consumer Demand Project 2019

## South Korea Market Fact Sheet



### Current South Korean Visitation and Expenditure in Queensland<sup>1</sup>

South Korean visitation to Queensland decreased by 13.9 per cent in the year ending September 2019 to 70,000. Over the same period, South Korean overnight visitor expenditure declined by 8.2 per cent to \$233.0m but there was an increase of 2.5 per cent in nights spent in the state, to 3.0m.



**\$233.0m** spend  
-8.2% year-on-year



**70,000** visitors  
-13.9% year-on-year



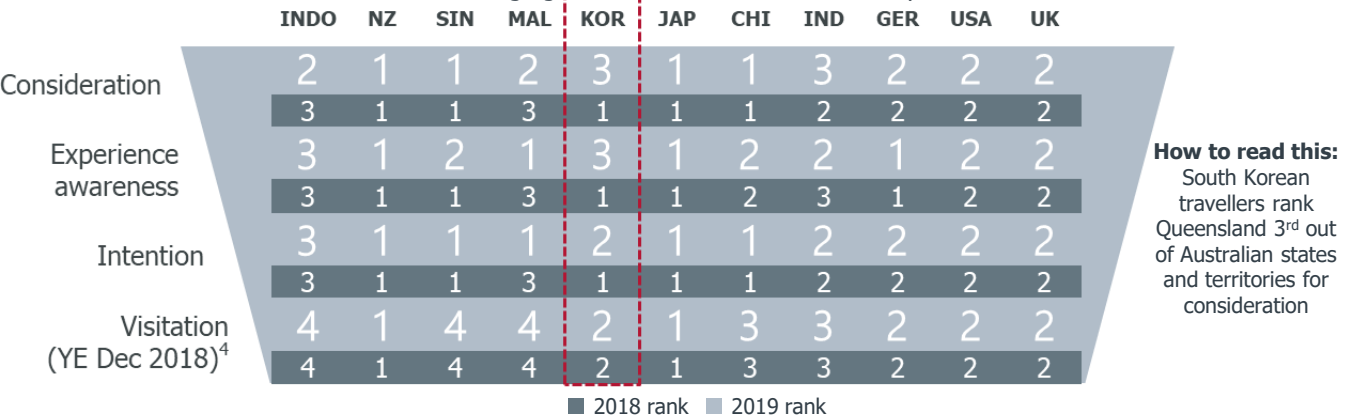
**3.0m** nights  
+2.5% year-on-year

### Competitive purchase funnel

The funnel shows traveller attitudes to destinations throughout the travel planning cycle. Amongst Australian states and territories, Queensland was ranked 3<sup>rd</sup> highest amongst South Korean travellers for consideration and experience awareness, and 2<sup>nd</sup> highest for intention. It was the second most visited state.

#### Queensland's competitive rankings<sup>3</sup>

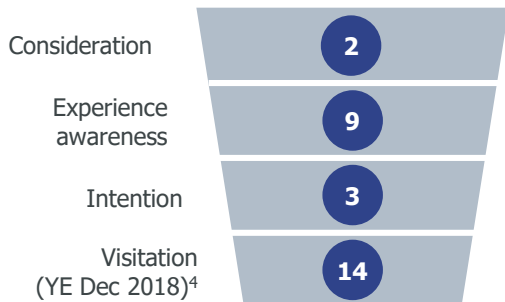
ranking against other state and territories by market



**How to read this:**  
South Korean travellers rank Queensland 3<sup>rd</sup> out of Australian states and territories for consideration

### Australia's competitive rankings – S. Korea market

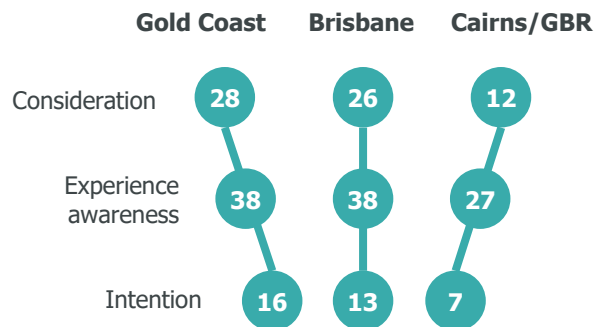
ranking against other international destinations



**How to read this:** Australia comes 3<sup>rd</sup> in the list of destinations South Korean travellers intend to visit, but ranks 14<sup>th</sup> in terms of actual visitation

### Queensland destinations – S. Korea market

% of travellers considering Australia



**How to read this:** 28% of South Korean travellers considering visiting Australia have considered visiting the Gold Coast, but only 16% intend to actually visit

<sup>1</sup> Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)  
<sup>3</sup> INDO = Indonesia, SIN = Singapore, MAL = Malaysia, KOR = South Korea, JAP = Japan, CHI = China, IND = India, GER = Germany  
<sup>4</sup> Tourism Research Australia, International Visitor Survey, Year Ending December 2018 (CDP visitation based on December data)

# Consumer Demand Project 2019

## South Korea Market Fact Sheet



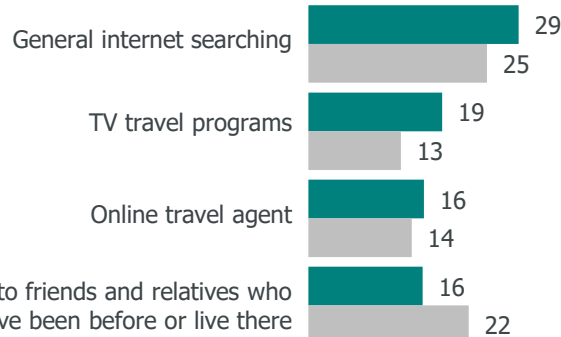
### Sources for travel planning

Compared to the other markets, South Korean travellers are more likely to do general internet searching for trip inspiration, and to be inspired through TV travel programs.

The most common travel booking trends were flights booked through travel website and apps, and bookings directly through airlines (online). Travel websites/apps were also popular for booking tours and accommodation.

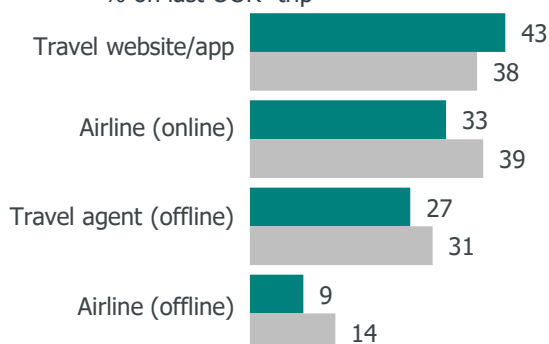
### Sources of inspiration for last trip

% on last OOR<sup>5</sup> trip



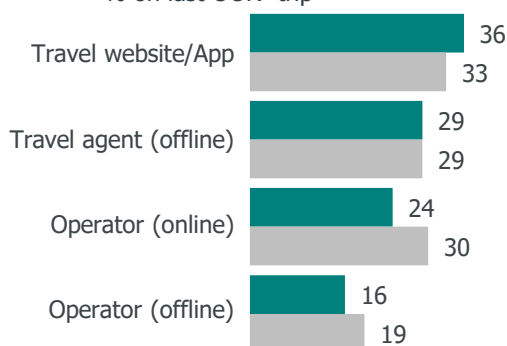
### Sources used to book flights for last trip

% on last OOR<sup>5</sup> trip



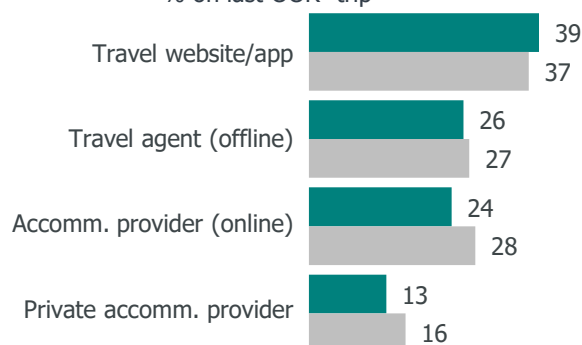
### Sources used to book tours for last trip

% on last OOR<sup>5</sup> trip

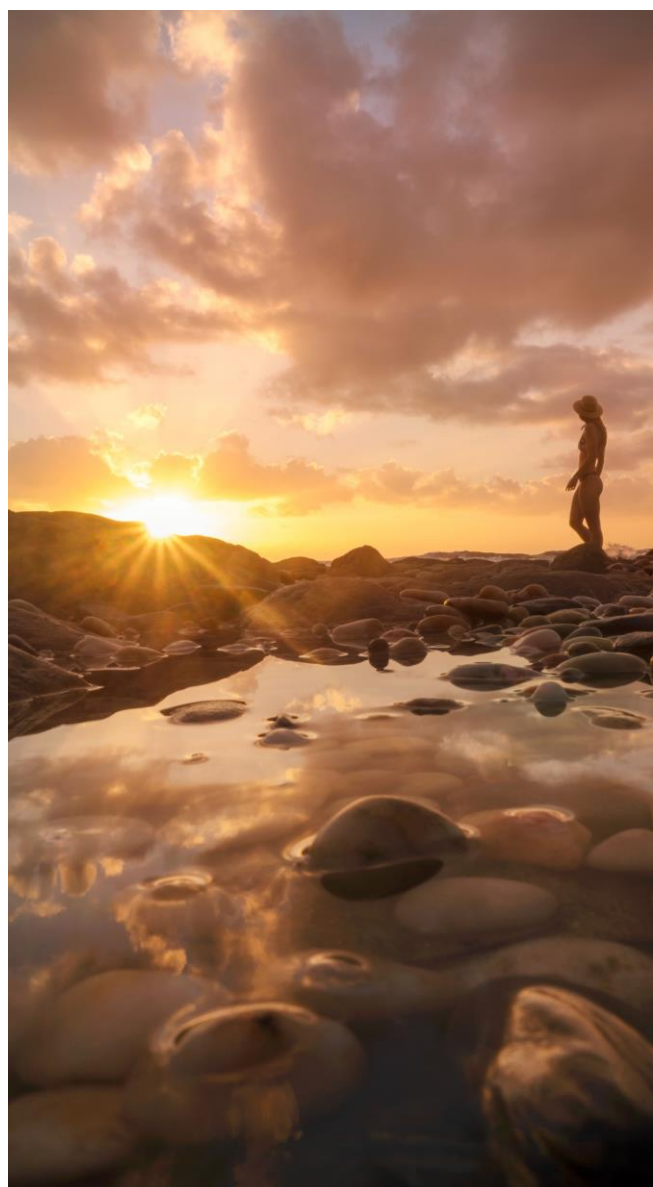


### Sources used to book accommodation for last trip

% on last OOR<sup>5</sup> trip



■ South Korean travellers ■ 11 Market total<sup>2</sup>



<sup>2</sup> Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

<sup>5</sup> OOR Trip – Out of Region Trip (South Korean travelling outside South Korea/China/Hong Kong/Macau/Japan/Taiwan)