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Month of Publication: November 2015
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Executive Summary

Over the past few years, the outbound market for South Korea has grown significantly, registering a Compound Annual Growth Rate (CAGR) of 8.2% from 2011 to 2014. Singapore has benefited from this strong demand for outbound travel, as Visitor Arrivals (VA) from South Korea to Singapore saw a comparable 9.0% CAGR over the same period. This has propelled the South Korean market from 12th to 9th position in terms of VA to Singapore.

South Koreans tend to be experienced travellers who avoid the inflexibility of packaged tours. Rather, they prefer to make their own travel plans and arrangements. They mostly take short trips to minimise imposing on their co-workers who cover their duties while they are away. As most South Koreans work long hours, they often view travel as a means of relaxing. Hence, ease takes top priority when it comes to their travels. They want a simple and fuss-free experience from the time they start researching on their trip to the point where they are finding their way around their destination of choice. While generally comfortable with English, South Koreans still prefer consuming information in their native language.

In 2014, 1 in 3 arrivals from South Korea visited Singapore for business purposes. Of these business travellers, less than 1 in 10 were willing to extend their trip for leisure. Of those who visited Singapore for BTMICE, 39% were “very likely” or “likely” to revisit Singapore in the next 1 to 2 years for leisure — the foremost reason for this being that they have always wanted to visit Singapore for a vacation. When shopping, BTMICE travellers will almost feel obligated to buy something for their colleagues, to thank them for covering their duties while they were away. Therefore, they would look out for gifts that are either premium or unique to the destination.

Methodology of STB Primary Research Sources

Figures from this report were gathered from STB’s internal research and publicly available sources. The STB’s research sources are STB’s Overseas Visitors Survey (OVS), the Leisure Segmentation Study (SEG), Business Traveller Study (BTS), Brand Health Tracking Study (BHTS) as well as various interviews and focus groups.

Overseas Visitors Survey (OVS) – conducted annually at exit points in Singapore, the OVS covers visitors from every nationality. The sample size is usually around 28,000 per year.

Leisure Segmentation Study (SEG) – conducted in 2013 in 4 key markets, SEG sought to understand the needs of different segments of frequent air travellers within our key markets of the United Kingdom, Germany, Hong Kong and South Korea. The sample size was 600 per market, for a total of 2,400.

Business Traveller Study (BTS) – conducted over 2011-2012 in Singapore, BTS covers over 2,000 business travellers from our key business source markets to understand their pre-trip and during-trip considerations, behaviour and touch points. Markets covered include Australia, China, South Korea, India, Indonesia, Philippines, Thailand, the UK, US and Vietnam.

Leisure Traveller Study (FGD) – conducted in October 2014 in South Korea to gain a deeper understanding of South Korean travellers, including their travel motivations and habits, as well as attitude towards and perception of Singapore.

Visitor Experience Study (VES) – conducted annually in Singapore since 2014, covering Leisure and BTMICE visitors from 14 top source markets to gain a deeper understanding of the experiences they consume here and post-arrival satisfaction with their Singapore experiences.
## About The Market

<table>
<thead>
<tr>
<th>Population (million) (^{(2)})</th>
<th>51.4 (May 2015)</th>
</tr>
</thead>
</table>
| Total Outbound Travel (million) \(^{(3)}\) | 2011: 12.7  
2012: 13.7  
2013: 15.0  
2014: 15.5 |
| Top 5 Travel Destinations in 2013 (‘000) \(^{(4)}\) | 1. China  
2. Japan  
3. USA  
4. Thailand  
5. Philippines |
| Type of Outbound Trips \(^{(5)}\) | Leisure: 57%  
Business: 25%  
Education: 12%  
Others: 7% |
| Seasonality of All Outbound Trips (000’000) \(^{(1)}\) | ![Seasonality Chart] |
The South Korean Traveller

The South Korean economy has rebounded strongly since the 2008-2009 global economic downturn. In 2014, South Korea saw GDP growth of 8% year-on-year (based on US$), and since 2011, grew at a CAGR of 6.5% (6). This, in turn, has driven up the disposable income of South Koreans, along with their appetite for international travel. As a result, the number of South Koreans travelling overseas has been growing at a rate of at least 8% annually since 2011 (1).

With 15.5 million outbound travellers in 2014, South Korea recorded the third largest outbound market in Asia Pacific, lagging only behind China (40 million) and Japan (17.3 million) (3). In line with their highly frequent travels and preference for researching travel information online, South Koreans, especially Seoulites, tend to be experienced travellers who prefer the flexibility of planning their own trips, rather than going on full-board package tours.

Outbound travel from South Korea comprised mostly regional destinations, with 9 out of the top 10 destinations visited in 2013 being in Asia (4). China and Japan were the most popular outbound destinations due to their close proximity to South Korea. The USA was the only non-Asia Pacific destination to make it to the Top 10 list. This could be because the US is regarded as an aspirational destination (2nd-most aspirational destination after Paris/France) and the relaxation of visa requirements since 2008, which has made the country more accessible to South Koreans.

Arrivals from South Korea in 2013 ('000,000) (4)

<table>
<thead>
<tr>
<th>Destination</th>
<th>Arrivals ('000,000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taiwan</td>
<td>0.4</td>
</tr>
<tr>
<td>Cambodia</td>
<td>0.4</td>
</tr>
<tr>
<td>Singapore</td>
<td>0.5</td>
</tr>
<tr>
<td>Vietnam</td>
<td>0.8</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>0.8</td>
</tr>
<tr>
<td>Philippines</td>
<td>1.2</td>
</tr>
<tr>
<td>Thailand</td>
<td>1.3</td>
</tr>
<tr>
<td>USA</td>
<td>1.4</td>
</tr>
<tr>
<td>Japan</td>
<td>2.0</td>
</tr>
<tr>
<td>China</td>
<td>4.0</td>
</tr>
</tbody>
</table>

While over 50% of South Koreans travelled domestically on Low-Cost Carriers (LCCs), Full-Service Carriers (FSCs) were still preferred for international travel (7). South Koreans view travel as a premium pursuit and thus expect full services when travelling by air. However, with the emergence of LCCs offering cheaper alternatives to more overseas routes, the share of LCC travel to short and mid-haul destinations is expected to grow.

"Air travel in Korea still has an image of being 'premium' and Korean people think an airline should provide service which is 'something special' and above that of other means of transportation such as rail, bus etc."

Hakjin Park,
Managing Vice President of Passenger Support Department, Korean Air
Overall Media Landscape

Although terrestrial TV and cable TV consumption is still relatively high compared to other media, South Koreans in their 20s and 30s are consuming more content online. While terrestrial TV maintained its market share lead, it is gradually being eroded by cable TV, including General Service Channels that cover all content ranging from drama, entertainment, news (e.g. JTBC, TV Chosun, Channel A and MBN) and Pay-TV (8). Drama and entertainment were the most popular content on TV for viewers across all ages, but viewers in their 20s drove the evolution of Video-On-Demand (VOD) consumed through multiple devices, such as mobile phones, tablets, and computers (9).

Given the importance of TV, marketers are increasingly leveraging TV content to drive brand awareness through product placements and branded content. Terrestrial and cable TV advertising spend led the advertising market with a 35% share, followed by digital search advertising and print. Though mobile advertising has the lowest proportion currently, it experienced exponential growth, increasing by 69% in 2014 (10).

Although readership of printed newspapers has been on the decline, their content (particularly that of key newspapers such as Chosun, Joongang, Dong-A and Maeil) has been actively consumed by PC-based online and mobile platforms such as the newspapers’ own websites, mobile applications and NAVER cast. Brands continue to invest in the key newspapers for 2 main reasons: to drive product awareness and cultivate on-going relationships so that they may potentially manage any negative articles. In order to claim a stake in the important TV market, especially after deregulation of the media market in 2009, key newspapers have ventured into the TV network business. As of 2012, these key newspapers have set up their own General Service Channels (e.g. TV Chosun by Chosun, JTBC by Joongang, Channel A by Dong-A and MBN by Maeil).

Digital Media Environment and Consumption Habits

South Korea’s Internet penetration, at over 92% (12), was the highest in Asia, and one of the highest in the world. In 2014, more than 9 in 10 South Koreans were active Internet users, which made digital platforms and communications crucial in the South Korean market. South Korea also recorded one of the youngest Internet bases globally, with close to 100% of those aged between 10 to 39 being Internet users.

On average, South Korean Internet users spent 13.9 hours weekly, or 2 hours daily, on the Internet. They used the Internet mainly for socialising, sharing personal interests, hobby and leisure, and to get information or news. Internet usage also varied widely across age groups, with those in their 20s doing more Internet shopping and selling (81%) while those aged 30 to 40 conducting more financial transactions (72%).

Naver was the most frequently accessed site among South Koreans, followed by Google, with both the Korean (Google.co.kr) and international site (Google.com) taking the 2nd and 3rd positions respectively in the Top 10 list of most accessed websites (12).
South Korea's digital landscape was dominated by local players such as Naver and Daum, with Naver accounting for a 70% market share of online advertising. Other international portals such as Yahoo! lagged behind these local players. South Korea's digital environment is unique in the sense that local portal sites handle searches with their own algorithms, rendering Search Engine Optimisation (SEO) ineffective. As a result, many brands and companies use E-buzz marketing (i.e. blog marketing) as the alternative.

South Korea has one of the most developed and active social media user bases globally. South Koreans in their 20s and 30s used social media to strengthen relationships with their network of contacts, while those in their 40s used it to find information and PR-related activities. Facebook was the largest social media platform in South Korea with over 13 million active users. However, KakaoStory was the most-used local social media platform, so government agencies and businesses used it for marketing and communications. Blogs were also very popular among South Koreans, with 84% of social media users reading or maintaining a blog. Over two-thirds of these users maintained a “minihompy”, South Korean shorthand for “mini homepage”. These are personalised online spaces set up through the Cyworld network.

More than half of South Korean Internet users made online purchases over the past year, with 23% doing so within the last month. The majority of online shoppers transacted using computers (86%) compared to smartphones (43%) and laptops (18%). On average, South Korean consumers made 1.2 purchases per month, with 9% of them making online purchases more than thrice weekly. Cosmetics formed the most popular items bought online, followed by clothing/footwear/sporting goods or accessories, and bookings/reservations (which include both hotel and restaurant bookings).
## South Korean Visitors to Singapore

### Visitor Arrivals ('000)*

<table>
<thead>
<tr>
<th>Year</th>
<th>Visitor Arrivals ('000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>415</td>
</tr>
<tr>
<td>2013</td>
<td>445</td>
</tr>
<tr>
<td>2014</td>
<td>472</td>
</tr>
</tbody>
</table>

### Tourism Receipts ($mil/%)**

<table>
<thead>
<tr>
<th>Year</th>
<th>Tourism Receipts ($mil)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>$457</td>
</tr>
<tr>
<td>2013</td>
<td>$465</td>
</tr>
<tr>
<td>2014</td>
<td>$586</td>
</tr>
</tbody>
</table>

### Tourism Receipts – per capita ($)

<table>
<thead>
<tr>
<th>Year</th>
<th>Tourism Receipts – per capita ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>1,026</td>
</tr>
<tr>
<td>2013</td>
<td>986</td>
</tr>
<tr>
<td>2014</td>
<td>1,092</td>
</tr>
</tbody>
</table>

### Purpose of Visits (%)***

<table>
<thead>
<tr>
<th>Purpose</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>VFR</td>
<td>15%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>BT/MICE</td>
<td>40%</td>
<td>37%</td>
<td>34%</td>
</tr>
<tr>
<td>Holiday</td>
<td>35%</td>
<td>35%</td>
<td>37%</td>
</tr>
</tbody>
</table>

### Weekly Flight Statistics (Flight Freq. to Singapore/ Seat Capacity)

<table>
<thead>
<tr>
<th>Flight Freq.</th>
<th>Seat Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>10,991</td>
</tr>
<tr>
<td>2013</td>
<td>12,947</td>
</tr>
<tr>
<td>2014</td>
<td>14,494</td>
</tr>
</tbody>
</table>

---

*All visitors are classified by country of residence unless otherwise stated. Visitor arrivals include all visitors arriving by air and sea and non-South Korean citizens arriving by land. **Sightseeing, entertainment and gaming expenditure has been excluded from tourism receipts in the country breakdown due to commercial sensitivity of information. Other TR Components include expenditure on airfares, port taxes, local transportation, business, medical, education and transit visitors. ***Others include those here for education, healthcare, work-related purposes, accompanying passengers and personal events.
South Korean Visitors to Singapore

In 2014, Visitor Arrivals (VA) from South Korea reached its highest since 2007 and was ranked 9th in terms of VA to Singapore, which had grown at a Compound Annual Growth Rate (CAGR) of 11% from 2010 to 2014. Of every 3 visitors to Singapore from South Korea, 1 visited Singapore for BTMICE purposes.

Driven by strong VA growth, Tourism Receipts (TR) from South Korea saw a corresponding CAGR of 11% from 2010 to 2014. On the other hand, Per-Capita Expenditure (PCE) remained stable over the same period, registering a CAGR of 0.5%. The average length of stay (ALOS) among South Korean visitors also held steady at 2.9 days.

In 2014, accommodation made up the largest component of expenditure for South Korean visitors in Singapore (41%), followed by food and beverages (16%) and shopping (12%). Expenditure on accommodation and food and beverages increased steadily by a CAGR of 16% and 17% respectively from 2010 to 2014. Shopping PCE, on the other hand, registered a smaller CAGR of only 3% over the same period. The high expenditure on accommodation could be due to South Koreans’ penchant for comfort when travelling, corroborated by the fact that 4 in 10 South Korean visitors to Singapore stayed in upscale or luxury hotels.

The South Korean Leisure Traveller

Needs of the South Korean Leisure Traveller

South Koreans regard travel as a way of “healing” and maintaining their personal well-being, as it offers an opportunity to rest and recuperate from the stresses of daily living. They also see travelling as a form of personal enrichment, to broaden their horizons and gain new experiences.

South Korean travellers generally preferred short trips that lasted 5 days or less, making regional destinations popular among them. The reason for this could be that South Koreans feel it is an imposition on their colleagues who have to cover their workload while they are away. South Koreans tend to pack as much as possible into a single trip and prefer all-in-one destinations that offer opportunities to unwind along with the conveniences of city living. Hence, their ideal destination was one that’s relaxing (e.g. beaches), yet close to the city centre where they can enjoy a variety of activities and amenities such as shopping and sightseeing.
Considerations for Travel

The most important travel consideration for South Koreans is the needs of their travelling companion(s). The travel decision maker typically considers the needs of all travelling on the trip and then works out a budget based on those demands.

South Koreans who travel without children list budget and getting value for money as their foremost travel consideration. In contrast, those travelling with children place their children's needs as the key consideration. The latter prefer destinations that offer unique cultures and experiences that cannot be found back home. English-speaking destinations are also popular as they provide the opportunity for children to practice speaking the language. Family travellers also prefer mono-destination travel as they deem it too tiring to travel to several countries in a single trip.

Planning and Booking Trends

The majority of South Korean travellers planned and booked their trips only within a month of their travel dates. This could be attributed to the fact that most of their trips were to familiar regional destinations that require less planning.

Scheduled school holidays during the months of December/January and August were the most popular travel periods for family travellers. Those that travelled with friends, spouse or partners tended to take advantage of public holidays and long weekends. Increasingly, the latter are travelling during the Seollal Holiday in January/February and the Mid-Autumn Festival in September, which are traditionally reserved for family reunions.

Being relatively experienced and Internet-savvy travellers, South Koreans are comfortable making travel bookings online, either via travel agents and aggregator websites or directly from airlines or accommodation providers. Unlike other consumers that tend to make price comparisons on multiple channels before booking (such as those from Hong Kong or China), South Korean travellers consulted an average of just 1.6 channels prior to booking. This might explain their preference for aggregator websites, which allow them to book multiple trip components together, or online travel agents that offer airtel (airfare and hotel) and day-tour packages.

Information Sources Before and During Travel

South Koreans conducted most of their pre-trip research online through search engines such as Naver and Google, and preferred websites that offer travel content and booking options in their native language.
They also preferred user-generated content such as travel blogs and forums, which they consider richer, less biased and most up to date. Examples of such content include travel blogs and forums, which South Koreans regarded as the most useful information sources. Non-commercial blogs were considered the most trusted sources, followed by Naver Cafes (forums) because the content on these sites contain first-hand accounts contributed by visitors to the destinations. Websites of National Tourism Organisations (NTOs) were mainly accessed for the downloading of e-vouchers, deals and official guidebooks. Recommendations from relatives and friends who had lived in or travelled to the desired destinations were the most trusted offline sources of information. South Korean travellers also relied on brochures from travel agents or tour operators, followed by travel guidebooks. Travel magazines were less trusted because they were perceived to contain sponsored articles. South Korean celebrities or key opinion leaders (KOLs) played an important role in raising awareness of or inspiring visits to travel destinations. For example, air ticket sales to Istanbul, Barcelona and Vientiane, where the hugely popular programmes “Grandpas Over Flowers”, “Sisters Over Flowers”, and “Boys Over Flowers” were filmed, increased by 127%, 122% and 110% respectively in 2014. International celebrities tend to have less influence over the travel decisions of South Koreans.

During their travels, online sources such as travel review sites and search engines continued to be the most popular channels for gathering information and also served to complement offline sources such as travel guidebooks. South Korean travellers tended to rely on these online sources for information on shopping, dining and attractions during their trips. Many also turned to mobile applications for dining recommendations. Travel review forums or websites were very popular because of the swift responses provided by other users. One South Korean traveller reported receiving a reply within minutes of posting a request for recommendations for good paediatricians to treat her sick child during a trip.

**Advocacy**

When it comes to sharing their travel experiences, a relatively high 40% of South Korean travellers surveyed said they were likely to post their experiences online or talk to family and friends about it. In terms of online sharing, they would either blog about it or post pictures on social media sites, both while at the destination and after their trip.

**South Korean Leisure Visitors in Singapore**

South Korean leisure travellers perceive Singapore as a safe destination that is relatively accessible and easy to get around. They view the island as a place that can offer them a resort-style travel experience and sightseeing options at the same time. This fulfilled their top travel needs of escaping from the daily grind and the flexibility of trip planning. South Korean visitors stayed in Singapore for an average of 3 nights.
In 2014, 7 in 10 South Korean leisure visitors to Singapore were first-time visitors \(^{(18)}\). Among their top reasons was visiting friends and relatives, and the fact that Singapore fulfilled their need for an all-in-one destination that combines beaches and city amenities.

About 40% of South Korean visitors to Singapore came as part of multi-destination trips. Most of them visited Indonesia (42%), followed by Malaysia (19%), Vietnam (9%) and Hong Kong (9%) on the same trip.

**Leisure Activities in Singapore**

More than 70% of South Korean visitors came to Singapore to "holiday/rest & relax" \(^{(18)}\), which was significantly higher than the global average of 59%. Apart from relaxing and "visiting friends and relatives", they also cited "sightseeing/visiting attractions" as other reasons for visiting.

Chinatown, the Integrated Resorts, Merlion Park, Sentosa and Gardens by the Bay were the most popular places for sightseeing (in descending order of preference). The popularity of Chinatown could be attributed to the fact that South Korean travellers, coming from a homogeneous society, appreciate learning more about other cultures when abroad \(^{(15)}\). As for the popularity of Marina Bay Sands, anecdotal evidence points to the fact that many South Koreans know it was built by a South Korean construction company and thus feel compelled to visit it as a result of national pride.

Unlike in other top source markets, shopping was not one of the top activities for South Korean visitors in Singapore, which corresponded with the low shopping spend recorded. This could be attributed to the fact that Singapore was not perceived as a shopping destination in comparison to other regional cities such as Thailand and Hong Kong. When they did shop, the most popular shopping areas were Changi Airport, Orchard Road, Chinatown, the Marina Bay area (Marina Square/ Raffles City/ Suntec) and Marina Bay Sands (The Shoppes). They spent most on 'Fashion and Accessories', followed by 'Food and Confectionery', 'Wellness and Beauty' and 'Gifts and Souvenirs' \(^{(18)}\).

**Barriers to Visiting Singapore**

Cost and a general lack of awareness of the country's offerings were the key barriers to visiting Singapore \(^{(15)}\). South Korean travellers perceived Singapore to be expensive compared to other countries in the region. Many who had never visited Singapore were not inclined to find out more about its offerings and continue to think that Singapore lacks unique tourist experiences or new attractions. In surveys conducted, many South Korean respondents mentioned well-known landmarks such as the Merlion and Marina Bay Sands, and were unaware of newer attractions such as Gardens by the Bay or the Marine Life Park \(^{(13)}\).

Nevertheless, there are good reasons why Singapore could be attractive to South Korean family travellers: It is perceived as a clean and safe English-speaking country, traits desired by South Korean parents travelling with children. They see the English language as important to their children's education and future, and thus want to expose them to English-speaking countries through travel. Naturally, parents also appreciate a safe travel environment for their families.
South Korean BTMICE Visitor in Singapore

The South Korean BTMICE Visitor

In 2014, South Korea was ranked the 3rd-largest business travel market in Asia and 8th-largest globally, with business travel expenditure growing by an average of 6% annually over the last decade (7). The aggressive overseas expansion undertaken by many large conglomerates (chaebols) in South Korea since the 1990s was one of the key contributors to strong outbound business travel.

BTMICE VA grew at a CAGR of 0.5% over 2010 to 2014. South Korea's BTMICE TR contributed to 43% of South Korea's total TR with a Per Capita Expenditure (PCE) that was 69% higher than that of a leisure visitor (S$1,561 vs. S$921 respectively). Approximately 60% of BTMICE expenditure was contributed by Accommodations, followed by F&B (~20%). More BTMICE visitors from South Korea (80%) chose to stay at mid and higher-tier hotels compared to the average BTMICE visitor to Singapore (60%).

4 out of 5 BTMICE visitors to Singapore were male, the majority of which were senior management or decision makers. Almost 9 in 10 BTMICE travellers from South Korea engaged in some leisure activities while on business in the island-city. However, less than 1 in 10 indicated that they would extend their business trips for leisure (19). This could be because it was against their employers' company policies. On average, South Korean BTMICE visitors stayed for 2.9 days in Singapore (18).

The majority of South Korean BTMICE visitors to Singapore were repeat visitors (close to 80%), with about 90% having been to Singapore in the past year.

Information Sources

Typically, South Korean BTMICE visitors do not conduct pre-trip research. During their trip, most of them (63%) relied on friends, family or colleagues residing in Singapore as their main sources of information. Because of the language barrier, South Korean BTMICE visitors preferred not to seek information face-to-face, such as from hotel concierges or taxi drivers. Therefore, a possible way of availing information to them would be arrival guides in Korean with content customised for time-strapped BTMICE travellers.

South Korean BTMICE Visitors’ Leisure Activities

South Korean BTMICE visitors typically worked beyond standard office hours even during their trips. While 41% of all BTMICE visitors surveyed for the Business Traveller Study allocated the
period from 6pm to 9pm for leisure activities, 61% of South Korean BTMICE visitors allocated that same period for work \[^{(19)}\]. After-hours entertainment was considered an official work commitment and an important avenue for building relationships with colleagues or clients.

While shopping, buying items that reflected the local identity of the destination was the most important consideration for South Korean BTMICE visitors. The preference for “local” items was significantly higher than other markets surveyed, and travellers almost felt obligated to buy something for their colleagues to thank them for covering their duties while they were away. As such, the gifts must either be premium (either in value and/or quality) or unique to the destination.

Findings and Implications

With increasing competition when it comes attracting South Koreans — who are largely experienced travellers that want distinctive experiences — it is a challenge to engage them and create a sustainable desire to travel to a particular destination. The main reason for South Korean leisure travellers not visiting Singapore is a lack of awareness of what the destination offers. It is therefore imperative that news, offerings and updates about Singapore’s tourism scene are communicated to them regularly. This should be done for the BTMICE segment as well.

Below are the key insights and opportunities we have identified:

**Finding #1: Leverage the right celebrities and influencers to drive awareness and the desire to consume the experience personally**

With content disseminated across all media platforms, marketers in South Korea compete intensively to stand out. Apart from developing the right content, it is therefore critical to deliver the content successfully to the targeted consumers in a timely fashion.

Many successful marketing campaigns use popular celebrities and influencers, such as power bloggers, to drive brand messaging or product awareness. As such, product placements in popular Korean dramas and variety shows are common, with their influence extending beyond the shores of South Korea. Most consumer products and services in South Korea are endorsed by Korean celebrities while power bloggers were frequently used to drive awareness of products and services. Though South Korean consumers were aware that these bloggers are part of the marketing process, their endorsements were still an important avenue for information on products or services.

Destinations are also competing to increase their share of the lucrative Korean outbound market by working with media partners and celebrities. This is an approach that has proven to be effective. For example, the “Grandpas/Sisters/Boys over Flowers” television travel series has driven travel to the featured destinations, benefiting markets such as Taiwan, Peru and Croatia.
Finding #2: Play up the uniqueness of Singapore as a modern city offering exciting and exceptional experiences that they cannot find back home

South Koreans who have never visited Singapore think it is no different from other cities such as Hong Kong, or even Seoul, albeit more expensive and further to travel to. In addition, they inevitably compare the cost of travelling to Singapore with that of neighbouring Southeast Asian countries. Therefore, when marketing Singapore in South Korea, the uniqueness of Singapore's offerings has to be explicit.

Our research has indicated that South Korean travellers are not excited by the mere fact that Singapore is home to many cultures. If they wanted to experience different cultures, such as Chinese or Indian cultures, they would travel to China or India. However, what South Korean travellers could be interested in is discovering how Singapore has successfully blended and shaped its myriad cultures to create a distinctive Singapore identity. Immersion is also important to them, and where possible, South Korean travellers would like to participate in local activities and festivities.

Tips for the Industry:

- **Food is a trendy topic in South Korea now**
  Food has been the hottest trending topic in South Korea since 2014. Given South Koreans' passion for food and their tendency to experience a destination's culture through food, the uniqueness of its dining experiences is something to highlight.
- **Work with popular Korean influencers**
  These influencers could be celebrities, TV personalities or bloggers. They are critical in delivering content amidst South Korea's cluttered media landscape.

Finding #3: “Healing” is an important travel need; highlight ease, safety and convenience to further reinforce the message

When South Koreans travel, it is the only time they can break away from the stresses of work and rejuvenate. The ability to offer an environment in which they can fully relax and experience peace...
of mind while travelling are unique selling points that Singapore can highlight. To further alleviate
the stress of travelling, information should be easily accessible and available in the Korean
language.

Within a quick 5-day trip, which is the duration preferred by most South Korean travellers,
Singapore offers the safety and convenience that meet their needs, especially those with children.
Often, when marketing Singapore we do not highlight our high hygiene standards, but these are
critical factors that greatly complement Singapore’s destination messages.

### Tips for the Industry:

- **Korean-language information and collaterals are a MUST**
  
  For South Koreans, a pain point when travelling is the language barrier. They need to
  consume information in Korean both before arrival and during their trips. They rely
  heavily on Korean content online to make travel decisions or plan their itineraries. At their
  destination, they feel more comfortable receiving information in their native language.
  Therefore if signages or information are not available in Korean, mobile applications or
  even audio guides that can be downloaded in advance and used during the trip could be
  developed.

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