Inbound COVID-19 Sentiment Tracker

Market Snapshot – South Korea

Read the full report for Wave 4 here (PDF, 8MB)

If you need the data in a different format, please contact research@visitbritain.org

Bristol Balloon Fiesta: Destination Bristol ©Gary Newman
South Korea Market Summary

Travel intentions
Intending to travel abroad for leisure*

<table>
<thead>
<tr>
<th>Wave 2</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>56%</td>
<td>60%</td>
</tr>
</tbody>
</table>

Journey purpose

<table>
<thead>
<tr>
<th>Holiday</th>
<th>Other leisure purposes</th>
<th>Visit friends or relatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>93%</td>
<td>17%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Planning stage

<table>
<thead>
<tr>
<th>Wave 2</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>28%</td>
<td>32%</td>
</tr>
<tr>
<td>45%</td>
<td>43%</td>
</tr>
<tr>
<td>26%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Among leisure trip intenders:

- 36% consider Europe
- 11% consider Britain

Among Britain intenders:

- 57% consider England
- 34% consider Scotland
- 18% consider London
- 13% consider Wales

Travel preferences

Top activities
- Iconic tourist attractions: 50%
- Dining out: 47%
- Visiting cultural attractions: 45%
- Outdoor nature activities: 42%
- History and heritage: 42%

Top Travel Companions

- With your spouse/partner: 61%
- With friends: 26%
- With children (under 18): 23%
- With adult family members: 20%
- Alone: 17%
- As part of a tour group: 4%

Destination types

- Small/mid-sized city/town: 29%
- Large city: 52%
- Will roam around: 50%
- Coastline: 35%
- Country/village: 19%
- Mountains or hills: 15%

Top modes of transport within Britain

- Public transport - Tube/subway: 46%
- Public transport - Train: 36%
- Rented car/vehicle: 36%
- Public transport - Bus: 31%
- Domestic flight: 23%
- Uber/other sharing app: 22%
- Private coach/minibus: 16%
- Own car vehicle: 13%

*(% definitely & probably) in the next 12 months

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022

All data is from Wave 4, unless stated.
South Korea Market Summary

**Top travel drivers**

* for any international trip
- Decrease in coronavirus cases at destination: 42%
- Hygiene & safety protocols in place at destination: 32%
- Removal of quarantine policies in destination country: 29%
- An attractive offer e.g. discounts on flights or accommodation: 25%
- Insurance for COVID-19 related travel/regulations changes: 24%

* for a trip to Britain
- Decrease in coronavirus cases at destination: 34%
- Hygiene & safety protocols in place at destination: 26%
- Removal of quarantine policies in destination country: 25%
- An attractive offer e.g. discounts on flights or accommodation: 22%
- Insurance for COVID-19 related travel/regulations changes: 22%

**Travel concerns – for travel to Britain**

- Contracting COVID-19 during my journey/trip: 88%
- Access to healthcare if I contract COVID-19 abroad: 87%
- Other people not following COVID-19 policies/procedures: 85%
- Change in quarantine requirements on my return home: 80%
- Extra admin involved with new policy/rules during the trip: 80%
- Locals’ attitude towards international tourists: 76%
- Costs of mandatory COVID-19 tests: 73%
- Limited / restricted experiences at destination: 72%
- Affordability of robust travel insurance: 68%
- Accessibility of affordable air fares: 49%

**Travel attitudes**

- I would be happy to take a pre-trip COVID-19 test should that be required: 81%
- I will think more about sustainability when planning future holidays: 74%
- I will look for less crowded places, even if I miss attractions: 70%
- I will delay my next international trip until Omicron is under control: 69%
- Booking through a travel agent is a safer option at the moment: 66%
- I will favour local destinations instead of traveling internationally: 66%
- I will be intending to take fewer but longer holidays: 59%
- I would be comfortable using public transport within the destination: 59%
- I will favour international destinations closer to my home country: 58%
- I will leave booking until later/last minute: 53%
- I will favour destinations I have been before rather than new places: 42%

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*% very & somewhat concerned
**% completely & somewhat agree