The Present & Future of Mountain Tourism in Korea

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CONTENTS

- The Present of Mountain Tourism in Korea
- Controversies of Mountain Tourism in Korea
- The Future of Mountain Tourism in Korea
The Present of Mountain Tourism in Korea
Population: 51,327,916  

Landmass: 100,283.9 km²  
[Statistics Korea, 2014]

- 64% of Korea is mountainous area
- 77% of mountains are reserved forest land

=> 49% of Korea is reserved forest land
## Ski Resorts in Korea

<table>
<thead>
<tr>
<th>region</th>
<th>registered</th>
<th>closed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gyeonggi</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>Kangwon</td>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>Chungbuk</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Jeonbuk</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Gyeongnam</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td><strong>total</strong></td>
<td><strong>19</strong></td>
<td><strong>3</strong></td>
</tr>
</tbody>
</table>

[Korea Ski Resort Association]
Ski Resorts in Korea

- Ski resorts location
Ski Slope Users

The Present of Mountain Tourism in Korea

Ski resorts users

(Year) (thousands)

[Korea Ski Resort Association]
## Skiers at the Top 4 Resorts

<table>
<thead>
<tr>
<th>resort</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yongpyung</td>
<td>533</td>
<td>463</td>
<td>439</td>
</tr>
<tr>
<td>Vivaldi</td>
<td>845</td>
<td>946</td>
<td>728</td>
</tr>
<tr>
<td>Phoenix</td>
<td>598</td>
<td>517</td>
<td>468</td>
</tr>
<tr>
<td>Hi-one</td>
<td>792</td>
<td>674</td>
<td>621</td>
</tr>
</tbody>
</table>

(Thousands)

[Korea Ski Resort Association]
Skiers from Overseas

<table>
<thead>
<tr>
<th>year</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>foreign tourists</td>
<td>245</td>
<td>244</td>
<td>396</td>
</tr>
</tbody>
</table>

(Thousands)

[Ministry of Culture, Sports and Tourism, 2013]
Ski Resort Selection Attributes

- Price (40.6%)
- Transportation (36.8%)
- Distance (33.4%)
- Accommodation & Recreational Facilities (30.0%)
- Convenient use of Auxiliary Facilities (22.9%)
- Number of Slopes (20.4%)
- Quality of Snow (19.7%)

[tendmonitor.co.kr, 2013]
Expenditure on Visiting Ski Resorts

<table>
<thead>
<tr>
<th>Korean Won</th>
<th>50,000~10,000</th>
<th>100,000~150,000</th>
<th>150,000~200,000</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>percentage (%)</td>
<td>19.4</td>
<td>29.9</td>
<td>16.4</td>
<td>65.7</td>
</tr>
</tbody>
</table>

[Frequently Used Lift Ticket]

<table>
<thead>
<tr>
<th>lift ticket</th>
<th>day time</th>
<th>afternoon</th>
<th>evening</th>
<th>midnight</th>
</tr>
</thead>
<tbody>
<tr>
<td>percentage (%)</td>
<td>44.4</td>
<td>44.4</td>
<td>17.6</td>
<td>14.4</td>
</tr>
</tbody>
</table>

[tendmonitor.co.kr, 2013]
Ski Resort Business (2013)

- Sales: 887 Billion Won (660 million EUR; 1EUR=1,330 won)
- Employees at Ski Resorts: about 8,000 people

[Ministry of Culture, Sports and Tourism, 2014]
Key Characteristics of Ski Resorts in Korea

- Short Season: Temperature, Snowfall, Altitude of the Mountains
- Short Stay: Day Use or One Night Stay
- Variety of Amenities such as a ‘Water Park’
Reasons for the Recent Decline of Skiers

✓ Recession
✓ Ageing
✓ Shift of Preferred Leisure Activities
Marketing Strategies of Ski Resorts

✓ Ski Lift Discount
  - Co-marketing with Credit Cards
  - Selling Lift Tickets by Social Commerce

✓ Development of a Variety of Amenities
  - Water Parks
  - Forest Trails
  - Fun Parks including Grass Sledding Areas, Luges, Zipwires
  - Adventure Playgrounds
Hiking Population: 15 millions

✓ 30% of Koreans enjoy hiking
Trekking Boom

- Jeju Island Olle Trail (Olle-gil) since 2007
- Jiri Mountain Round Trail (Jirisan Dulle-gil)
- Bukhan Mountain Round Trail (Bukhansan Dulle-gil)

595 Trails in Korea (1,689 Sections)

- Total 17,671km [Ministry of Culture, Sports and Tourism, May 2013]
Camping Boom

✓ About 3 Million campers in Korea [Statistics Korea, 2014]

Various Types of Camping

✓ Glamping, Caravans, etc. ...
✓ Stealth Camping in Mountains
The Problems of Mountain Tourism in Korea

✓ Culture of Hiking: Preference in Hiking to Mountain Summits
  - Simply enjoying the mountain itself than doing other activities

✓ Lack of Infrastructure
  - 670 Cable Cars & Mountain Trains in Switzerland (34 at Zermatt)
  - 21 Tourist Cable Cars in Korea (only 1 on Seorak Mountain)

✓ Lack of Recognition of Mountain Tourism
  - Overlooking Economical Benefits of Mountain Tourism
    - Primary Industry (Forestry & Livestock Industry)
      + Secondary Industry (Construction of Log House, Cable Cars ...)
      + Third Industry (Accommodation, Dining, Outdoor Activities)
Comparing Mountain Tourism Expenditure
between Switzerland and Korea

<table>
<thead>
<tr>
<th>items</th>
<th>Switzerland Rigi Mountain</th>
<th>Korea Seorak Mountain</th>
</tr>
</thead>
<tbody>
<tr>
<td>transportation</td>
<td>Mountain Train 77,000 Won</td>
<td>9,000 Won  Cable Car</td>
</tr>
<tr>
<td>accommodation</td>
<td>Hotel 250,000 Won</td>
<td>10,000 Won  Shelter</td>
</tr>
<tr>
<td>meals</td>
<td>Restaurant 39,000 Won</td>
<td>5,000 Won &amp; 8,000 Won</td>
</tr>
<tr>
<td>others</td>
<td>Paragliding &amp; Other Activities 155,000 Won</td>
<td>-</td>
</tr>
<tr>
<td>total</td>
<td>519,000 Won</td>
<td>32,000 Won</td>
</tr>
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</table>

[chosun.com, 2015]
Controversies of Mountain Tourism in Korea
Pre-announcement of 「Mountain Tourism Promotion Area Designation and Management Law」 by Ministry of Culture, Sports and Tourism on Sept. 4, 2015

- Nature Friendly Development of Mountain Tourism by Designating a Mountain Tourism Promotional Area
- Revitalization of Regional Economy by Promoting Investment
Conditional Approval of ‘Ohseak’ Cable Car Construction at Soerak Mountain on Aug. 28, 2015

- From ‘Ohseak’ to ‘Kkeucheong’ at Soerak Mountain (3.5Km)

21 Tourist Cable Cars in Operation

- Among them, 3 cable cars are in national parks
  (Soerak, Naejang and Deogyu mountain)

About 30 local governments attempt to get permissions to install cable cars
The Core Controversies

- Environmentalism vs Advocacy of Development
  - Environmentalism
    
    “Nature will be damaged by human interventions”
  - Advocacy of Development
    
    “With careful development, most of nature can be preserved and transformed into a place where human and nature co-exist”
Background of Mountain Tourism Promotion

- Effective Utilization of Mountains (64% of Country)
- Activation of Domestic Tourism (Intra-bound)
  - Sustainable Growth of International Tourism (In & Out-bound)
  - Sluggish Domestic Tourism

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>Growth</th>
<th>2012</th>
<th>Growth</th>
<th>2013</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>outbound tourist</td>
<td>12,694</td>
<td>1.6</td>
<td>13,737</td>
<td>8.2</td>
<td>14,846</td>
<td>8.1</td>
</tr>
<tr>
<td>foreign tourists</td>
<td>9,795</td>
<td>11.3</td>
<td>11,140</td>
<td>13.7</td>
<td>12,176</td>
<td>9.3</td>
</tr>
<tr>
<td>domestic tourists</td>
<td>35,013</td>
<td>13.2</td>
<td>36,914</td>
<td>5.4</td>
<td>37,800</td>
<td>2.4</td>
</tr>
</tbody>
</table>

[KTO, 2014]

- Boosting Domestic Economy through the Industrialization of Mountain Tourism
The Future of Mountain Tourism in Korea
The Growth of Outdoor Recreation

- Increase of the interest in ‘Health’
- Returning to the ‘nature’
  - Domestic Sales of Bicycle: 1.8 million (2008) ⇒ 2.5 million (2012)
  - Outdoor Supplies & Apparel Market: 4.3 trillion (2011) ⇒ 6.9 trillion won (2013)

Desired place for leisure

- 1st: Mountain (8.9%)
- 2nd: Neighborhood Park (6.5%)  

[Trekking Himalaya & the Alps

[Ministry of Culture, Sports and Tourism, 2014]
66 Minutes from ‘Seoul’ to ‘Gangneung’ by KTX

✓ Phoenix Park, Yongpyung Resort, and Alpensia are located 10 minutes from ‘Pyeongchang’ or ‘Jinbu’ station by shuttle bus

✓ Easily Accessible from Incheon International Airport to Those Ski Resorts
66 Minutes from 'Seoul' to 'Gangneung' by KTX

- Phoenix Park, Yongpyung resort, Alpensia are located 10 minutes from 'Pyeongchang' or 'Jinbu' station by shuttle bus

Easily accessible from Incheon international airport to the ski resorts

The future of Mountain Tourism in Korea

Wonjoo-Gangneung KTX train route map

- Gangneung station
- Pyeongchang station
- Jinbu station
- Yongpyong Resort
- Phoenix Park
- Alpensia
Mountain Tourism Vitalization Plan

- Enhance the Recognition of Winter Sports via ‘Pyeongchang Olympic 2018’
- Enlarge the Market by Supporting Children and Elderly
- Develop New Programs which converge Winter Sports and Relaxation Programs, such as Spa or Medical Tourism

“The most important thing is to minimize the negative image of mountainous area development by undertaking a sustainable tourism development approach”
Thank you for your attention