

## Monitoring and Evaluation of Seoul's Basic Tourism Environment

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### Summary

In order to provide international tourists with greater levels of satisfaction, Korea must first make its tourism infrastructure more convenient and tourist-friendly.

### 1. Introduction

**Plans for improving the overall attraction of a destination should be based on detailed information about the current status of tourism infrastructure. Data previously gathered by the national and regional surveys are insufficient**

The Seoul Metropolitan Government (SMG) has set the goal of enticing 20 million international tourists. It initially aimed to attain it by 2020, but later has changed it to by 2018. In order to make this happen, the SMG must maintain a high growth rate of inbound tourists. This requires attracting first-time visitors as well as those who already have visited the city. In this regard, the government has carried out various tourism promotion policies such as one endorsing tourism content development. While continuing the current endeavor, the SMG should thoroughly investigate what international tourists find inconvenient and unsatisfied. Then, it should plan out a strategy to effectively address problems.

Since 2010, the number of international tourist arrivals in Korea has been increasing by on average 10 percent a year. Surely, it mirrors the rising popularity of the country among travelers. Unfortunately, many complaints are also being reported today. As an effort to unravel the problem, the national government and the SMG each conduct a survey of inbound tourists every year. Korea Tourism Organization (KTO) also collects and manages complaints from international

tourists through Tourist Complaint Center. Yet it is difficult to identify specific causes of inconvenience experienced by tourists. This is partly because two aforesaid surveys are ineffective in that they use the same set of closed-ended questions. Besides, the majority of international travelers do not know where and how to report complaints. Even if they have such knowledge, they tend to leave the country without taking any action.

### **This research monitored the conditions of Seoul's tourism facilities by engaging in comprehensive research**

As mentioned earlier, the current surveys with closed-ended questionnaires fail to pin down the culprit of tourists' inconvenience. For this research, a group of researchers created a new system of monitoring tourism infrastructure in Seoul. First, they designed a simulation of travel experience in the city. The simulation reproduced a travel journey from entering the country to departure. It could identify specifically when, who and what gives tourists inconvenience or discomfort. Next, the researchers organized a field study: in-depth interviews of inbound tourists at various tourism sites.

Besides Korean nationals, 150 foreigners from different countries participated in the study as investigators. For starters, they played the role of tourists in the simulation. Their main task was to identify problems with physical and aesthetic aspects of Seoul's tourism infrastructure. Next, they interviewed 300 international tourists. While they carried out the interviews, they checked whether interviewees also experienced the same inconveniences as they did.

[Table 1] Basic Components of a Tourism Destination

Basic physical components					
Airport	Transport	Accommodations	Shopping Facility	Restaurant	Tourist Site
Basic aesthetic components					
Hygiene	Service	Design	Street Condition	Travel Convenience	

## 2. Main Findings

The analysis of complaints reported to the Tourist Complaint Center (operated by KTO) and the survey of inbound tourists to Korea (conducted by the Ministry of Culture, Sports and Tourism) show that the overall status of tourism infrastructure is as below.

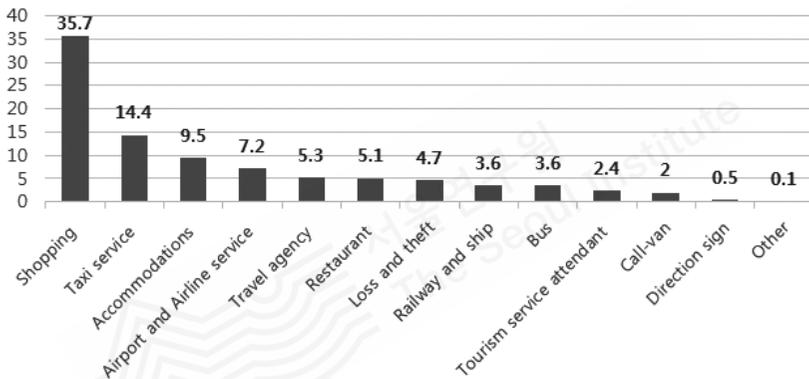
### **Shopping, taxi service and accommodations are top three categories for complaints**

Since 1977, KTO has been operating the Tourist Complaint Center. The center is responsible for identifying what causes inconvenience and discomfort to inbound tourists. Its task extends to finding a solution to reported problems. Any tourist can file a complaint by calling 1330 (without a telephone exchange number), faxing, e-mailing, sending a letter, or visiting the official website or the office. Once the center receives a complaint, it either transfers it to responsible organizations or handles it by itself.

Every year, the center analyzes reported complaints. Based on the analysis, it tells what issues must be addressed. The center publishes a comprehensive analysis report on the matter every year. It is used by the national government as supporting data for laying down tourism policies, planning R&D, and improving services in such a field.

In 2014, the Tourist Complaint Center received 1,154 complaints in total: 1,060 (91 percent) of them were about inconvenience, of which 888 (84 percent) were from international tourists. In fact, 977 (85 percent) of total number of complaints were from international tourists: 61 percent from Chinese, Taiwanese and Hong Kong citizens; 24 percent from Japanese; 7 percent from other Asians and Oceanians; 6 percent from Americans; and 2 percent from Europeans. This order correlates with the order of countries that send the largest number of tourists to Korea in the same year.

The reported complaints (save those cannot be categorized by cause) have been classified into 12 items (refer to Figure 1). Three hundred and seventeen complaints belonged to shopping. It represented the greatest share (36 percent) in total number of complaints. It was followed by complaints placed under the categories of taxi service (128; 14 percent) and accommodations (84; 10 percent). Those fell under the item of other accounted for about 10 percent - comprised of complaints about computer glitches on tourism information websites, a lack of amenities such as restrooms at tourism sites, and errors in card payment.



Source: Comprehensive Analysis Report on Tourist Complaints in 2014, KTO(2015)

[Figure 1] Complaints from International Tourists for each Category

### **International tourists regard difficulty of communication, high traveling expenses, and low quality food as top three dissatisfactory factors.**

The Ministry of Culture, Sports and Tourism first carried out a survey of inbound tourists in 1974. Every year since then, it has surveyed international visitors. Through this effort, the nation has evaluated how satisfied tourists are with its tourism infrastructure. It also has studied the consumption trend of inbound travelers. Furthermore, yearly comparison of findings has been conducted. Overall,

the study serves the purpose of providing basic data for improving condition of tourism infrastructure. Ultimately, it will be used in planning out policies to entice international tourists.

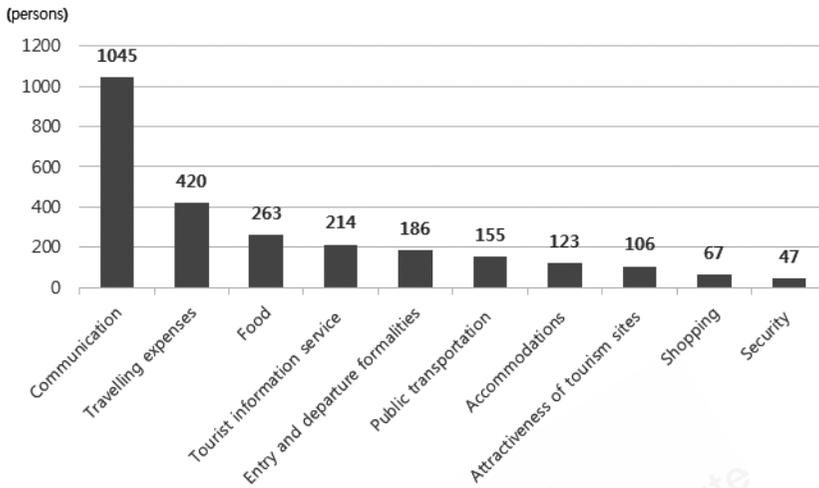
The survey involves international tourists only. It has narrowed down the samples further by only including those who satisfy the following criteria: older than 14 and staying in the country for minimum one day and maximum one year. Obviously, visitors staying only in airports have been excluded. In 2014, the sample size was 12,024. The investigation period was seven days per month from January to December of that year.

A questionnaire asking tourists for their satisfaction in Korea are consisted of ten items: transport, shopping, accommodations, and so forth. Each question is designed in the Likert scale: a one-to-five, with one being very dissatisfactory and five being very satisfactory. In the survey, the largest group of respondents (1,045) gave the lowest mark to communication. In other words, they found difficulty of communication most dissatisfactory. High travelling expenses, low quality food, and inadequate tourist information service followed behind.

[Table 2] Items in the Survey of Inbound Tourists in Korea

1. Entry and departure formalities (entry procedure, visa issuance)
2. Public transportation (convenience, service)
3. Accommodations (convenience, service)
4. Food (taste, service)
5. Shopping (convenience, facilities, service)
6. Attractiveness of tourism sites (cultural heritages, natural scenery, night tour)
7. Tourist information service (Tourist Information Centers/tourist information, tour guides, direction signs)
8. Communication
9. Travelling expenses (prices of souvenirs and at tourism sites)
10. Security (safety)

Source: Field Study of Inbound Tourists in Korea 2014, the Ministry of Culture, Sports and Tourism (2015)



[Figure 2] Dissatisfactory Factors Reported by Inbound Tourists in Korea

### Difficulty of communication was selected as the most dissatisfactory factor

82.5 percent of total inbound tourists in Korea visit Seoul. Indeed, Seoul is the most-loved travel destination in the country. SMG annually conducts a field study of international tourists visiting the city. It identifies and analyzes actual conditions of the city's tourism infrastructure. The government does so to lay down appropriate tourism policies. For this study, a sample of 3,000 tourists has been surveyed in the period between May and October in 2014.

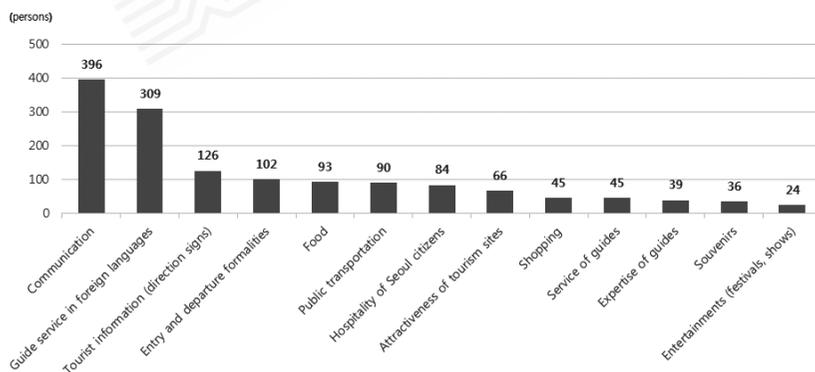
As previously mentioned, the Ministry of Culture, Sports and Tourism has conducted the poll involving about 12,000 international tourists in 2014. Likewise the SMG has carried out a similar survey on its own. It has availed itself of a questionnaire inquiring how satisfied international travelers are. The survey is comprised of 13 items in total: transport, shopping and other tourism-related items except accommodations. Again, each question is designed in a one-to-five scale from very dissatisfactory (one) to very satisfactory (five).

[Table 3] Items in the Survey of Inbound Tourists in Seoul

1. Entry and departure formalities	8. Communication
2. Shopping	9. Attractiveness of tourism sites
3. Food	10. Hospitality of Seoul citizens
4. Entertainments (festivals, shows)	11. Souvenirs
5. Public transportation	12. Expertise of guides
6. Tourist information (direction signs)	13. Service of guides
7. Guide service in foreign languages	

Source: *Field Study of Inbound Tourists in Seoul 2014*, SMG (2015)

The survey has discovered that 396 respondents gave the lowest mark to communication. A lack of guide service in foreign languages took the second place from the bottom. This is particularly dire as it may lower the level of tourist satisfaction with communication further. Besides these two, 126 inbound tourists answered that they are not pleased with tourism information. Meanwhile, entry and departure formalities, food and public transportation were each selected as dissatisfactory factors by 102, 93 and 90 respondents, respectively.



Source: *Field Study of Inbound Tourists in Seoul 2014*, SMG (2015)

[Figure 3] Dissatisfactory Factors Reported by Inbound Tourists in Seoul

### Difficulty in communication is chosen as the most dissatisfactory factor by respondents in both studies

The Ministry of Culture, Sports and Tour and the SMG have six common items in their surveys. And it has been found that international tourists participated in each survey picked difficulty of communication as the most dissatisfactory factor. Respondents who took part in the Ministry's survey responded that entry and departure formalities are the second most dissatisfactory factor. The third was food. The opposite is the case with participants of the SMG's. As mentioned earlier, over 80 percent of inbound tourists visit Seoul. This implicates that the quality of food and restaurant services are especially poor in Seoul compared to other cities in the country. Meantime, both groups chose the same items for the remaining 4th, 5th and 6th places.

[Table 4] Dissatisfactory Factors Each Chosen by Inbound Tourists in Korea and Seoul

Rank	Korea	Seoul
1	Difficulty of communication	Difficulty of communication
2	Entry and departure formalities	Food
3	Food	Entry and departure formalities
4	Public transportation	Public transportation
5	Attractiveness of tourism sites	Attractiveness of tourism sites
6	Shopping	Shopping

### 3. Conclusions & Policy Recommendations

After monitoring the overall conditions of tourism infrastructure in Seoul, following conclusions and policy recommendations are formed.

### **Make the current direction signs at Incheon Airport more tourist-friendly, while improving the quality of materials provided at Tourist Information Centers**

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According to the field study, direction signs at Incheon International Airport, in general, better incorporate foreign languages today than before. Much of information is provided in not only English, but also in Chinese and Japanese. In particular, English and Japanese are found on small signs as well. However, Chinese is still omitted in a number of signs.

There are two Tourist Information Centers inside the airport. Each is located in the east and west corner on the first floor. It would not be difficult for incoming tourists to find the place. But the problem is with information provided there. For instance, leaflets about accommodations are only filled with high-end luxurious hotels. There is no information on affordable places to stay. Contents must be improved.

### **Wrongful acts of taxi drivers prevail, whereas public transportation fails to provide information in foreign languages.**

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The research shows that scores of taxi drivers still engage in wrongful acts. Some drivers intentionally made a detour from the airport to downtowns so they could charge tourists double or triple the actual cost. Most foreigners are unfamiliar with directions in a new place. So they often rely on local drivers. And some unscrupulous drivers exploit this. For most of the time, international tourists do not realize whether they are being deceived. Given that, the actual number of wrongful acts committed by taxi drivers would be higher than what has been reported. Needless to say, this wrongdoing hurts the image of Seoul and its citizenry. Not only that, it hampers the development of tourism industry. Thus, a solution must be sought.

Legions of international tourists are also discovered to experience inconvenience while using public transportation (e.g. airport limousines, airport express, city buses, metros). It is largely due to a lack of information provided in their languages.

Airport limousine bus and express take international visitors from Incheon International Airport to Seoul downtown. They are the very first public transportation that incoming foreigners use. Yet, some direction signs still neglect Chinese, while some announcement is made in Korean only.



[Figure 4] Airport Express Line Map



[Figure 5] Screen of Self-ticketing Device

According to the study, international tourists use subway more than buses in Seoul. It largely owes to the fact that foreigners cannot obtain information about bus stops in their languages. Chinese and Japanese can hardly hear announcements in their words at bus stations.

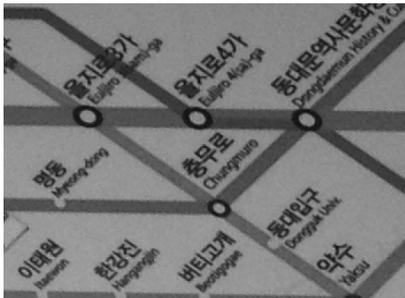


[Picture 6] Bus Route Map at the Station



[Figure 7] Bus Route Map inside the Bus

The condition of subway is better than buses. Still, there have been some complaints about a lack of information on behalf of foreigners. Words on some subway line maps inside the train are written in English and Japanese. However, most are written in English only if not only Korean. Tourists may resort to a leaflet specially prepared for them. But the problem with that material is that it is written in only foreign languages. The study has discovered that some tourists encountered difficulty when seeking helps from citizens by showing them the leaflet.



[Figure 8] Metro Line Map inside the Subway



[Figure 9] Direction Sign at the Subway Station

A problem also arises from a difference in the pronunciation of Chinese characters: Koreans and Chinese pronounce Chinese characters differently. Some Chinese tourists complain about such confusion. Yet, the names of local places or constructions are deemed as proper nouns. By the international standard, they should be written in how citizens pronounce them. This is necessary to avoid a bigger problem that may arise - that is, neither citizens nor international tourists understand each other.

**Bolster the tourist guide system and the identity of theme places at tourism sites.**

For the purpose of investigation, tourism sites are classified into shopping areas, theme streets, traditional palaces, museums, and natural landscapes. The study shows that the direction signs are poorly installed in the last three places. Tourists often consider historical sites and museums as must-visit destinations. Nevertheless, there is no explanation or description about the places or exhibits written in foreign languages.

Natural landscapes such as Hangang River, Namsan Mountain, and Cheonggye Stream are insufficiently equipped with direction signs for tourists. Foreigners find it difficult to get there from bus or subway stations. In the case of Cheonggye Stream, tourists often miss it, for there is no sign at the entrance.

Meanwhile, the identity of Insa-Dong Antique Street is damaged by flooding commercial stores. It is one of the most famous theme streets in Seoul. Cultural and traditional features have long been loved by international tourists. However, a plurality of commercial stores and franchises recently have nested in the area. As a result, the place has been reduced to another common commercial place in Seoul.



[Figure 10] Directions Sign with only English and Korean

### **Improve the attitude and service of merchants and establish a fixed-price system in Special Tourism Zones**

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In general, international tourists are content with the current service provided by Korean merchants at major tourism sites like Special Tourism Zones. But some reported that they often feel uncomfortable with a few tradesmen soliciting at shopping areas like Myeong-Dong and Dongdaemun Fashion Town. They also said that some shop owners suddenly became hostile when they decided not to purchase goods. There needs a campaign to improve the attitude of servicemen and heighten the quality of their service.

Number of tourists reported frustration that they felt while talking to local merchants. For a simple transaction, communication is not an issue: The two parties can just look at a number on the calculator. But in other cases, tourists experience much inconvenience. They complained about the absence of price tag on products. They also said the same product is charged differently at different stores. Product descriptions must be provided in foreign languages. And every product should have a price tag. At the same time, a fixed-price system should be implemented.

### **Increase the number of bins and toilets on the road, while better manage hygiene of facilities**

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The field study shows that most complaints regarding to street condition were due to the followings: a lack of public restrooms and rubbish bins, messy signboards, stalls hampering pedestrian movement, and unclean environments. In regard to the stalls and road cleanness, some international tourists gave positive opinions. Some told otherwise. But they all said that a lack and ill management of bins and public restrooms are problems.

In general, the larger the walking population, the less clean the places are. Areas like Myeong-Dong, Dongdaemun, Namdaemun, and Itaewon are examples. This

may be due to the insufficient quantity of bins. Given that, the government should revisit the current policy endorsing the elimination of bins on the street. Problems will be solved to a certain extent if the government admonishes building owners to let the public use toilets on the first floor of their buildings. On top of this, it ought to clean up the mess in alleyways made by untidy signboards.



[Figure 11] Public Toilet in Myeong-Dong



[Figure 12] Trash on Myeong-Dong Street

### **Prioritize the policy supporting the improvement of tourism infrastructure**

The monitoring of tourism infrastructure in Seoul shows that many of problems identified in 2008 have been found again in 2015. Physical components have been improved significantly with increase in the number of international tourists. Yet aesthetic components have not. In order to provide international tourists with a greater level of satisfaction, the SMG needs to sort out problems associated with dirty public restrooms, a disturbing look of trash bins on the street, and excessive solicitation of merchants.

Each city (or region) has tourism attractions that have incomparable values. Cultural heritages and natural landscapes are the examples. Comparing them for the sake of establishing the degree of each area's competitiveness in attracting

international tourists is inappropriate. Instead the overall status of tourism infrastructure can work as an objective indicator. For instance, a city with inadequate tourism infrastructure can be regarded as relatively uncompetitive in enticing and maintaining the flow of international tourists. In this sense, improving the condition of such infrastructure is the basic and foremost agenda that must be taken into serious consideration for policy making.

