

# Thalassorama

## Marine Tourism Resource Development in Korea

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### Introduction

The tourism industry is the world's largest employer, accounting for 255 million jobs, or 10.7% of the global labor force in 1997 (World Tourism Organization 1998b). Growth over the past two decades has been rapid, and many new destinations have emerged to meet the demand. Northeast Asia has shown particularly strong growth in the recent past until the current financial crisis. Marine tourism is expected to play a major role in the rapidly growing nature-based travel industry.

For a variety of reasons, the marine tourism resources of Korea have been underutilized. Domestic use of marine resources is historically low because of cultural and economic factors and climate problems. International visitors have not made greater use of the coastal resources because of a national image problem and a lack of access and other basic tourism infrastructure difficulties.

Korea is now positioning itself to take advantage of expected future growth in marine tourism. A strong commitment by the central government to promote the tourism industry is aimed at capturing a much larger share of the world tourism market as the Asian markets begin to recover from the current economic crisis. Much of the investment will be solicited from the private sector with the support from the public sector.

Korea is also positioned to take advantage of another opportunity—preemptive marine environmental planning and policy implementation. Marine tourism will be sustainable only if the underlying resource is preserved. While the fishing industry is a strong force in the country, there are relatively few historical claims on, or special interests in, the nation's marine recreational resources. A strong central government can facilitate enviable environmental protection plans at a time before large private developers capture the resources needed as a sustainable base for the tourism industry.

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## **World Tourism**

### *World Market Shares*

The top ten world tourism destinations accounted for almost 52% of the world volume of tourism flows in 1997 (World Tourism Organization 1998a, p. 3). Due in part to its accessibility, France led all nations with 10.9% of international tourist arrivals. The U.S. was second with 8.0% of the market, followed by Spain (7.1%), and Italy (5.6%). The past five years have witnessed a gradual diversification of tourist markets with the emergence of new destinations such as China and Hong Kong SAR. The Republic of Korea currently attracts 0.6% of all international travelers.

The top ten recipients of world tourism expenditures earn 54% of the world's tourism receipts. The U.S. leads this category with 16.9%, followed by Italy (6.8%), France (6.3%), and Spain (6.1%). The republic of Korea currently earns 1.2% of world tourism receipts (World Tourism Organization 1998a, p. 4).

### *Growth*

Recent data show a setback in the growth rate of tourism activity worldwide, with tourist arrivals increasing by only 3% in 1997 and tourism receipts growing by only 2.3%. Asian tourism has grown impressively over the past years, but stagnated in 1997 due to financial market pressures. Northeastern Asia, consisting of China, Hong Kong, Japan, Korea D P Rp, Republic of Korea, Macao, Mongolia, and Taiwan, recorded its smallest growth since 1989, with increases of 0.7% in arrivals and 1.2% in receipts. While the Republic of Korea showed a 6.1% increase in tourist arrivals over 1996, its tourism receipts declined 4.2% (World Tourism Organization 1998a, p. 11).

According to the World Tourism Organization (WTO), "Lured by bargain prices, tourists will be flocking to Asia in 1998, but that surge will not offset travel industry losses caused by Asia's financial crisis" (World Tourism Organization 1998a, p. 1). The 1997 increase in numbers of visitors, but decline in receipts evidenced this in Korea. Further, the WTO predicts that, "tourism in East Asia and the Pacific will likely suffer for three years due to the financial crisis affecting many countries of the region" (World Tourism Organization 1998a, p. 1). At a meeting of the WTO's regional commission for East Asia and the Pacific in February 1998, the WTO Secretary General, Francesco Frangialli, said, "the good news is that beyond the year 2000, the region should recover the strong upward trend which seems to typify the pattern of its tourism development" (World Tourism Organization 1998a, p. 1).

## **Korea's Tourism Industry**

### *History*

Following the Korean War, which took place from 1950–53, South Korea was closed to outbound and inbound travelers. Gross domestic product per capita was low, and "little attention was paid to travel or recreation by Korean nationals" (Kim and Kim 1996, p. 46). Since then, there has been rapid economic growth, and an affluent middle class has emerged. The average household income soared from US\$1,600 to \$12,000 between 1985 and 1989, and double-digit inflation threatened the economy (Ahn and Ahmed 1994, p. 89). In 1989, when the government completely eased outbound travel and more flights became available, there was a 67% increase in out-

bound travel over 1988 levels (Kim and Kim 1996, p. 46). Previously, overseas pleasure travel was limited to Koreans who were at least 50 years old. The government became alarmed at the resulting travel spending deficit with the explosive increase in outbound travel and began a frugality campaign aimed at curbing overseas expenditures (Ahn and Ahmed 1994, p. 87). A travel spending surplus was generated after the International Monetary Fund crisis in 1997, but the deficit reemerged in the beginning of 1999 as the Korean economy recovered.

### *Tourism Events and Image*

Tourist behavior is critically linked to tourist perceptions about competitive destinations. It is true that negative perceptions of Korea in the past have included harsh winters, inferior consumer goods, high prices, and military conflicts with its northern neighbor (Chon and Shin 1990).

However, hosting the 1988 Olympics in Seoul and other international exhibitions has helped to overcome these negative images and has led to permanent improvements in hospitality, transportation, and communication facilities.

The government has taken aggressive steps to promote the nation's attractiveness to international visitors. By declaring 1994 "Visit Korea Year," the government hoped to attract 4.5 million visitors. It hosted the PATA Annual Conference in that same year and plans are being made to host the 3rd ASEM summit in 2000 and the 2002 FIFA World Cup. The government also has plans for the Incheon International Airport to become the airline hub of Northeast Asia.

However, some government actions may have backfired. The frugality campaign aimed at domestic travelers has affected inbound tourists as well. A September 1990 edict forced entertainment establishments to close by midnight (except for those on Cheju Island which could stay open until 1:00 a.m.) and mandated that hotels stop providing complimentary toiletries and close their fitness centers one day a week (Ahn and Ahmed 1994, p. 88). More recently, restrictions on the closing times of entertainment facilities were lifted.

### *Current Situation*

Tourists currently account for 64% of total visitors to Korea (1996). October is the busiest month, followed by May, August, and November. Japan was the largest market (41% in 1996), followed by the U.S. (10.8%), and China (5.4%). Tourists constitute the largest share of Japanese visitors (93%), but they constitute a smaller share (68%) of U.S. visitors, and only 16% of Chinese visitors (Korea Ministry of Culture and Sports 1998).

Relations between Japan and Korea became normalized in 1965, and Japan has accounted for approximately 40% of total arrivals ever since (Ahn and Ahmed 1994, p. 86). In 1992, diplomatic ties were established between Korea and China, but severed between Korea and Taiwan. The number of visitors from China has doubled since 1992, while the number of visitors from Taiwan (92% of whom are tourists) has fallen (Korea Ministry of Culture and Sports 1998).

The number of Koreans taking overseas trips increased from 450,000 in 1986, to 4,650,000 in 1996. Tourists have been consistently increasing as a percentage of the total outbound travelers, up to 50.5% in 1996 (Korea Ministry of Culture and Sports 1998). Since July 1, 1997, a 10,000 won duty has been imposed on Korean tourists traveling overseas by air and a 1,000 won duty if traveling by sea. These go into the Tourism Promotion and Development fund, which is used for tourism information

systems, development of local tourism resources, public relations, and education. This fund, which raised almost 200 billion won in 1996, is the only financial source for developing local tourism.

### *Marine Tourism Resources*

There is evidence of increasing demand from domestic and international tourists for coastal and marine activities. One obstacle to growth in this sector is that most of the marine-related sites suffer because residents and tourists do not find them easy to reach.

The coastline of Korea is about 12,000 km with over 3,150 islands off the west and south coasts (Kim and Kim 1996, p. 47). Except for a few locations, the west coast has limited potential for diving and other activities because of high turbidity and shallowness, although large marine resorts are being planned on land-filled areas near Inchon and Suwon. Also, there is potential for development of the islands off the west coast.

Due to its mild climate and the high quality natural environment, the south coast has potential for boating, swimming, and other marine tourism activities. In fact, many areas, including the islands and adjacent water, are in marine national parks (hereafter marine park). Cheju Island in the South Sea is a semitropical volcanic island with the famous Halla Mountain. It is attractive to many Koreans and Japanese visitors.

The east coast is well suited for sport fishing and scuba diving and is close to the famous Sorak Mountain. However, high waves, cool currents, and a steep slope in the coastal area restrict its use for water sports (Kim and Kim 1996, p. 48).

### **Domestic Marine Tourism**

The development of a marine tourism industry attractive to domestic travelers faces a number of other obstacles. Not the least of these is the cultural attitude about the coast and the sea. Before the Yi Dynasty (1392–1910), marine activities were brisk, and marine trade was carried out by conspicuous figures such as Bo-Go Chang and Gun Wang, the founder of the Goryo Dynasty. Since the Yi Dynasty, fishermen living in the coastal area belonged to the lowest class—a class held in contempt by the noble class. In addition, Japanese pirates historically attempted to invade coastal areas for food because of insufficient agricultural production in their country. Hence, the government ordered ordinary and noble people to live inland. In addition, many political exiles were sent to the coastal area or islands off the coast (Ju 1998). Therefore, the Korean people are apprehensive about going to the sea.

Korean children are raised hearing the saying, “Don’t get near to a river or a lake because you will drown.” Forefathers have depended heavily on a Shaman who would say, “Don’t get close to water or you may die.” Sayings by family and Shamans have had a strong negative influence on Korean attitudes about the sea (Tyrrell, Kim, and Chang 1998).

A study of 278 visitors to five Korean destinations: Cheju Island, Kyong-ju, Solak Mountain, Haeundae Beach, and Yusung hot spring, determined that six attributes explained 57.9% of the choice of destination (H-B. Kim 1998). In order of importance they are: seasonal and cultural attractiveness (21.4%); clean, peaceful environment, and price (9.6%); quality of accommodations and relaxing facilities (8.2%); family-oriented amenities and safety (6.8%); accessibility and reputation (6.5%); and entertainment and recreational opportunities (5.4%). Key words associated with marine resources and recreation were not among the top attributes.

Despite this cultural obstacle, there is reason to expect increased interest in marine tourism attractions to Koreans. With economic growth and affluence, there has been new enthusiasm for tour activities, such as skin scuba, windsurfing, boating, and fishing. Swimming has been the most popular seaside activity, but is limited to summer. Diving and windsurfing are increasing in popularity. There are over 100,000 people who have received dive training and over 300,000 windsurfers (S-G. Kim 1998, p. 484). However, yachting and water sports using imported leisure facilities and equipment are still restricted because of high tariffs and a special tax.

Marine parks of the south are increasing in popularity, but access is very inconvenient compared with terrestrial parks. Marine parks constitute about a third of all national parks in terms of size, but they account for only 13.0% of visitors because of their isolation from metropolitan areas. On the other hand, the growth rate of visitors to marine parks from 1992 to 1997 (13.0%) increased much faster than that of all national parks (3.7%) (S-G. Kim 1998, p. 486).

Cruising is a form of tourism that may bridge the cultural gap toward marine tourism and between the Koreas. Recently, the Hyundai Conglomerate in cooperation with North Korea, launched the Mt. Kumgang tour program using three cruise ships in the East Sea. Mt. Kumgang is one of the most beautiful mountains in Asia. During the daytime, visitors tour the mountain via a train starting from Jang-jun Port near Mt. Kumgang, and at night, ships are used as accommodation facilities. Unfortunately, a naval incident in the Yellow Sea and detention of a South Korean resident on one of the ships has halted the operation.<sup>1</sup> South Korean construction of inland accommodations near Mt. Kumgang and a floating hotel are planned in order to meet the demand. But these will take 5–6 years to complete. So, if diplomatic relationships are resolved, the cruising project should flourish until that time.

In Pusan, a 5,500-ton passenger ship is being converted to a floating hotel, and in Incheon, a new floating hotel including guest rooms, aquarium, ocean spa, *etc.*, is in the designing stage with a foreign investment of US\$400 million (Archi'esse Co. 1992).

Two thousand people hold licenses to operate recreational fishing boats around the fishing ports in Korea. These boats are very popular because they provide new access to the waters (Jo 1997, p. 31).

There is one small aquarium in Seoul. Other local governments have tried to build aquariums in the past, but have been unable to carry out the project because of lack of capital and technology. Recently, foreign investors have come forward, and several aquariums are being planned or are under construction.

Two inland water parks are operated in Korea, one in Yongin Everland, the largest theme park in Korea, and the other at a timeshare condominium near Sorak Mountain. Since Koreans have limited access to water areas, these facilities are very popular as safe recreational facilities.

## International Marine Tourism

International marine tourism faces its own obstacles. Not only are there many other competitive coastal resorts for international travelers to choose from, but Korean tourism industry investors have found other, more lucrative development projects, such as casinos, that will compete for tourism investment funds (Lee and Kwan 1997).

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<sup>1</sup> The incident occurred on June 15<sup>th</sup> and the detention on June 20<sup>th</sup> in 1999. The cruise was halted June 21<sup>st</sup>, and as of July 5<sup>th</sup>, the Hyundai Merchant Marine estimated a US\$9 million loss (*Chosun Daily News*, July 5, 1999, p. 5).

The Korea National Tourism Organization (KNTO) conducted an opinion poll to find out what inbound tourists think of visits to Korea in 1996. Among characteristics that foreign visitors found the most impressive or charming about Korea were historical sites, followed by shopping activity, handicrafts, and traditional costumes. Mountain tours ranked fourth, and islands (the only marine-related item) came in tenth.

### **The International Role of Government in Tourism**

In every nation, the central government tries to achieve a delicate balance between leadership and control. The appropriate balance is unique to each nation. "In many countries like the United States, the United Kingdom and Canada, the government plays a passive and low-key regulatory role acting as a facilitator for tourism development; whereas in Korea, government has become increasingly involved in tourism, promotion, even encouraging investment from the private sector (H.B. Kim 1998, p. 345).

The Korean government has taken a very active role in developing the nation's tourism industry by founding the KNTO and putting it in charge of major tourism complexes. The founding of the Cheju Tourism Corporation in 1980 has led to successful development of a major resort on the island. As of late 1996, 159 tourist sites had been developed across the nation. As of June 1997, there were 451 hotels offering 47,108 rooms, and 100 tourist hotels and 8 tourist complexes were under construction (Korea Ministry of Culture and Sports 1998, p. 29).

A five-year plan, which started in 1999 called "Tourism Vision 21," has goals of expanding the tourism resources to the international level, developing unique tourism goods and social infrastructures for a tourism complex, and promoting new millennium events, such as the ASEM conference in 2000, "Visit Korea Year" in 2001, and a World Cup event in 2002.

Promotion of the Korean tourism product has been aggressive. Traditional culture is the main theme of Korea's tourism promotions. Advertisements in Japan emphasize the geologic and psychological closeness of the two nations, under the slogan "Experience Korea." In Europe and the U.S., the ads have been targeted more toward the elderly (Korea Ministry of Culture and Sports 1998, p. 17). President Kim, himself, appeared in the trade ads made for foreigners.

One of the five major national policies in this administration is the promotion of tourism and culture. In this vein, the President also asked to increase next year's tourism budget, while cutting other budget items. He has spoken of the importance of tourism, especially marine tourism, so he ordered the Ministry of Culture and Tourism to systematically develop the South Coast Tourism Belt using its beautiful scenery, national marine parks, and the islands in the South Sea as a national project. This project is underway by domestic and foreign consulting companies including Nomura Consulting Co. in Japan, the Korea Maritime Institute (KMI), *etc.* This plan will emphasize the development of core tourism complexes, the linkage between complexes, the enhancement of Social Overhead Capital (SOC), and the policies for the inducement of domestic and foreign investment.

The KNTO has strengthened its promotional activities in Southeast Asia, specifically Hong Kong, Taiwan, Singapore, and Thailand, through ski tour events and other high value-added tour packages including golf and shopping (Korea Ministry of Culture and Sports 1998). In order to take advantage of the enormous potential market in China, the government has implemented several measures, such as simpler customs procedures, a Korea-China consultation body, and a duty-free agreement for visitors to Cheju Island.

Korea has signed a tourism agreement with China to eliminate visa require-

ments between the two countries, so it was expected that there would be an explosive increase of Chinese visitors to Korea, especially to Cheju Island. However, due to Chinese government restrictions on its citizens to visit foreign countries, the increase is not as large as was expected. Cheju Island, famous to the Chinese for its beautiful scenery, is still expected to see a considerable increase in Chinese visitors in the near future.

The Korean government is preparing to declare Cheju as an international free zone to replace the function of Hong Kong and Macau as they return to China (Korea Research Institute for Human Settlements 1998). Most scholars agree that Cheju must further develop its international tourism attractions before this can happen. Other government organizational activities are also notable. The Korea Tourism Research Institute (KTRI) was established in April 1996 to assist the government in forming tourism policies, to conduct in-depth studies on problems related to tourism, and to propose the development of the tourism industry. The Ministry of Transportation formed a "fund for tourism-industry assistance." In addition, the Ministry of Maritime and Fisheries (MOMAF), also established in 1996, is supporting tourism plans for fishing villages as mentioned above.

### **The Regional Development Role of Government in Tourism**

Since 1994, when local gubernatorial elections were held for the first time in Korea, regional development became a major goal of local leadership. They have been seeking domestic and international investment in manufacturing and tourism industries.

Locally promoted marine resort developments seem to be booming. Most of the provinces such as Cheju, Inchon, and Kyonggi are planning large marine resort complexes which include aquariums, water parks, marinas, fishing piers, resort hotels, and shopping centers.

The National Tourism Policy has adopted a national theme for regional development, "to create a climate to enrich patriotism through more leisure time. Regional development that encourages and preserves national heritages and the environment furthers this goal." This policy has been implemented by the creation of the Tourism Promotion and Development fund, which is used for tourism information systems, development of local tourism resources, public relations, and education. In addition, the second five-year National Tourism Development Plan (1997–2001) was prepared by each city and province and confirmed by the Tourism Policy Council in June 1997.

The Professional Congress Organizers became an integral part of the tourism industry in 1986, as stipulated in the revised Tourism Promotion Law. Also, the government implemented the Law on the Promotion of International Convention Industry on March 31, 1997 (Korea Ministry of Culture and Sports 1998, pp. 18, 32). This law stipulates size and use of convention facilities, gives priority support to convention cities, and streamlines issuing of permits. The first convention complex for ASEM 2000 in Seoul and large convention halls in Cheju and the Kyonggi Province are under construction or planned, which will be new milestones for the convention industry in Korea.

Nongovernmental organizations are arranging eco-tourism programs to utilize the ecosystem in the coastal area, especially on the tidal flats on the west coast. Some local governments, such as Inchon and a county in the Chonnam Province, are planning eco-parks using the tidal flats. Wetland and sea education centers, museums, experimental salt ponds, training camps, and aquariums are included in these plans.

In addition, MOMAF is planning to promote fishing village tours for the public as unique natural and cultural experiences. Local governments proposed fifteen villages as potential sites; five will be selected and subsidized by the government for development of tourism SOC in each village. In addition, these selected villages will be linked to a travel agency that is designated to advertise, arrange the tour program, and link the villages to tourists. A new village is planned by MOMAF for each of the next five years, from 1999 until 2004 (MOMAF 1999a, p. 3).

MOMAF is also creating a national plan to promote marine tourism throughout Korea. It will be the first of its kind and includes a survey of marine tourism resources, a market demand study, differentiated development plans determined by characteristics of each region, identification of roles for public and private sectors, and development of a legal system to promote and support marine leisure activities.

MOMAF is supporting construction of five maritime museums and a few fishing community exhibition centers in regional areas to promote and publicize ocean development and culture. Based on the subsidies for these facilities, local governments are planning larger coastal resort complexes using private investment. These include aquariums, water parks, marinas, and hotels. Therefore, this project is viewed as a stepping stone for further development of marine resorts in each region.

Recently, a proposal for Ocean Exposition in 2010 was prepared by the Chonnam Province with support from the Ministry of Maritime and Fishery. It was accepted as a national project in June 1999, and Yosu City was chosen as the intended site. Yosu City currently hosts chemical and steel-making industries and a port for container ships, tankers, and fishing boats. The national proposal to the Bureau of International Exhibitions will be submitted next year. It is expected that this project will arouse public concern about ocean development and become a good opportunity to promote marine tourism. If the bid is successful, the EXPO will have a major economic impact on South Cholla Province, approximately US\$9 billion in value added to the entire existing South Korean tourism industry of US\$10 billion (KNT0) (Chang and Cho 1999). Obviously, there will be major environmental issues associated with the event, including the potential for altering long-term sustainability from reuse of the facilities.

### **The Role of Government in Natural Resource Protection**

As mentioned above, to integrate tourism and the environment, the Ministry of Culture and Tourism has been charged with setting up the plan of the South Coastal Tourism Belt, the first of its kind in Korea.

With the execution of the Coastal Management Law of December 1998, most coastal tourism developments will be screened by the MOMAF. An Integrated Coastal Management (hereafter ICM) plan is being set up at the national level. Therefore, MOMAF's long-term marine tourism plan will be harmonized with the ICM plan.

At the beginning of 1999, MOMAF conducted its first formal review of a coastal resort development under the new ICM act. The new coastal resort was proposed for the east coast which would reclaim a public beach for the construction of a private resort facility. MOMAF's review committee rejected it be-



cause the resort would likely harm the ecosystem and scenic view of the beach, and it could limit public use of the beach due to a large private investment (MOMAF 1999b, p. 273).

## Observations

Marine tourism development is a double-edged sword. On a forward swing, the first edge means a substantial increase in visitors to the coastline, enabling expansion of businesses and creation of jobs in an economy struggling out of a serious economic slump. On the back swing, the other edge means a substantial increase in the pressure on a fragile marine environment that has been underutilized until the recent past.

Promotion of domestic marine tourism is expected to be very successful with an increasing number of Koreans able to afford coastal holidays. The cultural sentiments against ocean recreation are changing, and more people are participating in marine sports. International tourism promotion is also expected to be successful due to an increasing Chinese and Japanese market and new government policies.

The Korean and local governments have become extremely supportive of marine tourism. The ultimate example is the proposed EXPO 2010 that will nearly double the size of the nation's tourism industry. While environmental oversight and guidance have never been stronger, the nation is entering a new era of coastal development and the impacts will be large. A new effort to manage resources and balance the economic gains with environmental costs will be needed.

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