



UNWTO/WTCF City Tourism Performance Research

Report for Case Study: Seoul, Republic of Korea



Note: This document is a working paper

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Background

As part of the UNWTO-WTCF City Tourism Performance Research Survey, an instrument for collecting data that allows evaluating city tourism performance in cities worldwide, data was collected and interviews were conducted in Seoul City, one of the 16 cities worldwide participating in this exercise.

The UNWTO-WTCF City Tourism Performance Research Survey includes five key performance areas: Destination Management, Economic Perspective, Social and Cultural, Environmental Perspective and Technology & New Business Models.

Based on initial desk-based research, and in consultation with Seoul Metropolitan Government (SMG) Tourism and Sports Bureau, two key performance areas were identified for further investigation – Social and Cultural Perspective and Technology & New Business Models Perspective.

Data on the performance indicators under each performance criteria were collected from official data sources at the city level. In addition, on-site interviews were conducted with Seoul City Tourism, officials and other tourism stakeholders to gain further understanding of the city.

This report presents the findings from the survey undertaken in the month of July 2017.

1.0 Overview of Seoul City

1.1 Geography and economy

The Republic of Korea's capitol, Seoul, is a unique blend of ancient and modern city full of character and merit. The Seoul metropolitan area covers 605.21 sq.km, and has a total population of about 25.5 million (2015 estimates), accounting for around 50% of the country's total population and around 46%¹ of its GDP of USD 1.81 trillion in 2016.

The city has humid subtropical/continental climate marked by the East Asian Monsoon blowing from June to September, with August the hottest month with average high of 29.6° C, and average low of 22.4° C. Winters are continental in character and are often quite cool with month of January averaging a high of 1.5° C and a low of -5.9° C.²

1.2 History and culture

With a 2,000-year history, including over 600 years as the country's capitol, it has been a thriving center of the Korean peninsula's history, traditions and culture. Its well-preserved national monuments and palaces showcase its long history and is a major focus of domestic and international tourism. As a global megacity, Seoul is a place where the country's rich cultural and historic heritage blends seamlessly with the rapid development of 21st Century life.

Seoul is divided into two distinct regions by the Hangang, a river that flows through the center of the city. In Gangbuk, meaning "North of the River", one will find Seoul's five royal palaces, traditional markets, and many other cultural attractions from the Joseon Dynasty, when Seoul first became the nations' capitol. Meanwhile, Gangnam, or "South of the River" is the birthplace of the country's latest trends and the wellspring of its modern character. Now quite well known thanks to the 2012

¹ Organization for Economic Cooperation and Development (n.d.) *Country profile of Korea* (online) available at: <https://data.oecd.org/korea.htm> (12-07-2017).

² Köppen–Geiger climate classification system

smash hit Gangnam Style, the district is a popular destination for K-pop fans the world over, keen to visit the restaurants, bars, clubs, cafes, and even hair and nail salons and pharmacies frequented by their favorite “hallyu”, or Korean Wave stars.

Amidst the cultural monuments and futuristic designs however, visitors will also find a city determined to preserve its natural assets through the creation and maintenance of Seoul’s waterways, parkland, and other green spaces. Far-reaching initiatives in recent years to preserve the Hangang, its islands and tributaries, as well as develop recreational areas along its banks, have ensured locals and visitors alike are never far from nature. Similar efforts to protect and develop Seoul’s many mountain hiking trails and parkland, as well as the flora and fauna on their slopes have likewise maintained this strong commitment to ecotourism and environmental preservation.

A careful balance between nature and technology as well as the ancient and modern has given Seoul its unique character. It connects visitors with different worlds and allows them to experience bit of everything all in one place, from a serene, ancient palace garden one moment to an easily navigable subway station the next.

1.3 Transport infrastructure

The city has a well-developed transport infrastructure, comprising Incheon International Airport and Gimpo International Airport, port, and an extensive and fully integrated modern road, bus and rail public transport network catering to residents and international visitors alike. Incheon International Airport located around 60 km from the center of Seoul, is the primary international gateway airport serving the city and the country, while Gimpo International Airport services mainly domestic and regional international services, and is the second busiest airport in the Republic of Korea.

1.4 Tourism enterprises and attractions

In 2015, the city has a total of 126,785 guest accommodation and restaurant establishments employing 480,090 people, and 2,236 tourist attractions to cater to

international and domestic visitors. Of the attractions, 1,618 are classified as cultural heritage attractions, 156 as museums, 381 as theatres, and 81 as cinemas. In addition, it has three major purpose-built meetings, incentive, conference and events (MICE) venues with total of 180,536 m² to cater to business and other events. They are COEX with 106,612 m², aT Center with 58,294 m², and SETEC with 15,630 m².

The city's key attractions include major historic attractions such as Gyeongbokgung Palace and Seoul City Wall, cultural attractions such as Namdaemun Market and Namsangol Hanok Village, and amusement and entertainment attractions such as MBC World, K-Live, and Trickeye and Ice Museum.

The city offers the classic Korean gastronomic experience as well as a large variety of international cuisine, shopping, nightlife, entertainment and amusement to its leisure, business, MICE, and special interest international visitors. The city is the birthplace of K-pop and Korean Wave creating new markets especially among the Asian millennial segments.

Seoul City has been recognized as a global city of merit. In 2016, it was a City Award Finalist in the annual World Smart City Awards for its "Global Digital Capital and City of Digital Social Innovation" project, under which is once again a finalist in the 2017 awards with winner to be announced in November.³ The city has been ranked sixth in the Global Power City Index⁴ and Global Financial Centers Index⁵, exerting a major influence in global affairs as one of the five leading hosts of global conferences and conventions. In 2015, it was rated as Asia's most livable city with the second highest quality of life index globally by Arcadis.⁶ In 2014, Seoul was recognized as the world's most wired city and ranked first in technology readiness by Price Waterhouse Cooper's "Cities of Opportunity Report".⁷ The city is a leading world technology hub

³ Smart City Expo World Congress (n.d.), *The world smart city awards finalists* (online) available at: <http://www.smartcityexpo.com> (17-08-2017).

⁴ Mori Memorial Foundation Institute for Urban Strategies (October 2016), *The global power city index* (online) available at: <http://mori-m-foundation.or.jp> (17-08-2017).

⁵ Yeandle M. and Mainelli, M. (September 2015), *The global financial centers index* (online) available at: www.longfinance.net (17-08-2017).

⁶ Arcadis (2015), *Sustainable cities index* (online) available at: www.arcadis.com (17-08-2017).

⁷ Price Waterhouse Cooper (2014), *Cities of opportunity report 6* (online) available at: www.pwc.com (17-08-2017).

centered on Gangnam and Digital Media City and has been recognized as a “UNESCO City of Design”⁸ and declared a “World Design Capital” in 2010.⁹

⁸ United Nations Educational, Scientific and Cultural Organization (n.d.), *Creative cities network* (online) available at: <http://en.unesco.org/> (17-08-2017).

⁹ World Design Organization (2010), *Seoul appointed world design capital 2010* (online) available at: <http://wdo.org/> (17-08-2017).

2.0 Seoul City tourism

2.1 Tourism demand and supply trends

In 2015, the Seoul Metropolitan Area received 22.87 million visitors of which 10.4 million were international visitors coming mainly from East Asia principally China, Japan and Southeast Asia. The seasonal pattern of visitation is shown in the following Table.

Table 2.1 Monthly international visitor volumes, 2016

Month	Republic of Korea	Seoul (Estimate)	
	Total ³	Total ¹	Day visit ²
January	1,077,431	840,396	10,085
February	1,126,250	878,475	10,542
March	1,389,399	1,083,731	13,005
April	1,469,674	1,146,346	13,756
May	1,492,680	1,164,290	13,971
June	1,554,413	1,212,442	14,549
July	1,703,495	1,328,726	15,945
August	1,664,303	1,298,156	15,578
September	1,523,928	1,188,664	14,264
October	1,587,797	1,238,482	14,862
November	1,309,055	1,021,063	12,253
December	1,343,398	1,047,850	12,574
Total	17,241,823	13,448,622	161,383

1) 2016 Seoul Visit Ratio: 78.0%

Number of Seoul inbound (Estimate) = Number of inbound visitors to Rep. of Korea × 78.0%

2) 2016 Seoul same-day visit ratio: 1.2%

Day visit to Seoul (Estimate) = Total visitors to Seoul × 1.2%

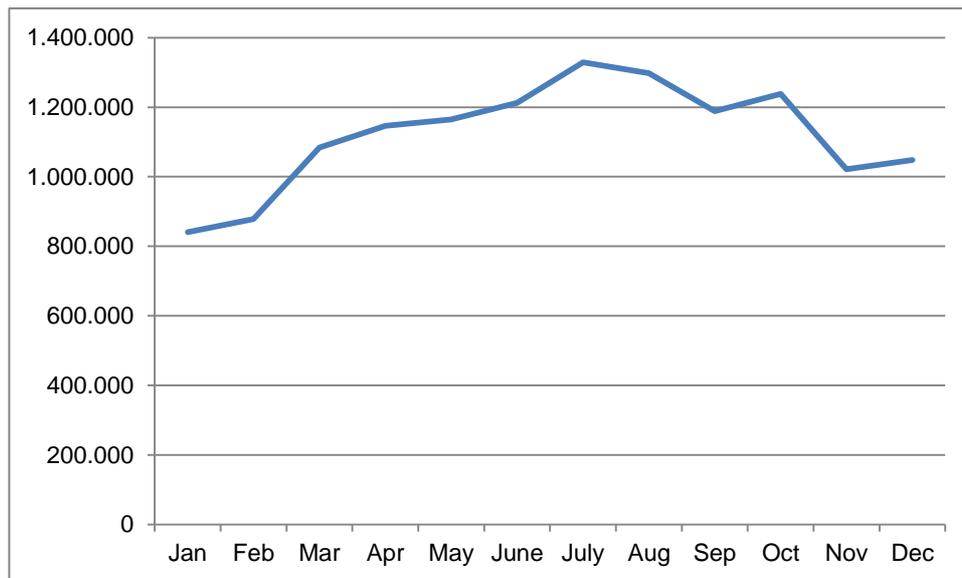
Source:

3) Korea Tourism Organization (n.d.), *Korea monthly statistics of tourism* (online) available at:

<https://kto.visitkorea.or.kr> (11-07-2017).

4) Seoul Tourism Organization (n.d.), *Tourism statistics 2016*.

Figure 2.1 Estimated monthly international visitor volumes to Seoul, 2016



Source: Seoul Tourism Organization (n.d.), *Tourism statistics 2016*.

In 2016, Seoul received an estimated 13.2 million domestic tourists, up 8% on 2015. Around 35% of domestic tourists stayed overnight of which around 30% were for leisure and recreation purposes, while for day visitors, around 35% were for leisure and recreation purposes.

Table 2.2 Seoul City domestic visitor volumes, 2015-2016

Year	Domestic visitors			Domestic visitors (Only tourism purpose)		
	Domestic	Overnight	Day visit	Domestic	Overnight	Day visit
2016	13,237,854	4,641,069	10,305,213	4,832,245	1,380,701	3,638,997
2015	12,451,891	4,492,318	9,328,855	4,213,958	1,207,961	3,123,089

Source: Seoul Metropolitan Government (2016), *Domestic visitor volume estimates 2015-2016*.

Of the total bed nights generated by visitors in 2015, 5.7 million were generated by domestic visitors and 4.2 million by international visitors. International visitors stayed an average of 5.2 nights with average party size of 2.3 persons. The main purpose of visiting Seoul by international visitors were leisure (88%) and business (22%). The main mode of transport for international arrivals is air, and for domestic visitors, surface transportation.

Table 2.3 International arrivals by mode of transport 2016

Mode	Location	2016		2015	
		Volume	Ratio (%)	Volume	Ratio (%)
Air	Incheon	9,862,596	57.2	7,667,973	57.95
	Gimpo	1,056,106	6.13	971,881	5.98
	Gimhae	1,056,106	6.13	791,062	7.35
	Jeju	2,882,069	16.72	2,022,782	15.29
	others	410,940	2.38	338,182	2.56
	Sub total	15,268,260	88.56	11,791,880	89.13
Water	Busan	854,489	4.96	464,370	3.51
	Incheon	608,636	3.53	529,281	4.00
	others	503,759	2.92	439,152	3.32
	Sub total	1,966,884	11.4	1,432,803	10.83
Other		6,679	0.04	6,968	0.05
Total		17,241,823	100.00	13,231,651	100.00

Source: Korea Tourism Organization (n.d.), *Korea monthly statistics of tourism* (online) available at: <https://kto.visitkorea.or.kr> (11-07-2017).

The peak season for commercial accommodation establishments are April and May, and August to November. The average per capita expenditure per overnight international tourist was KRW 2,270,000 or USD 2,022.89 at current prices.

Seoul City achieves fairly good visitor satisfaction ratings especially in the area of shopping, food, public transport, attractions, accommodations and safety and security.

Table 2.4 Seoul City Tourism Satisfaction Index

Index	2016	2015
Immigration process (e.g. process, issuing VISA)	3.95	3.91
Shopping (e.g. convenience, facilities and services)	4.13	4.08
Food (e.g. taste, services)	4.07	4.03
Things to enjoy (e.g. festivals, performances)	3.96	3.72
Public transportation (e.g. convenience, services)	4.07	3.99
Tourist information service (tourist information booths/center, tour guides, signs)	3.86	3.77
Communications in different languages	3.49	3.37
Attractive tourist destination (e.g. cultural heritage, natural scenery, night tour)	4	3.85
Accommodation (e.g. convenience, services)	4.1	4.01
Travel expense (e.g. price for tourism products, living costs in tourist destinations)	3.87	3.82
Public order (safety)	4.2	4.14
Overall satisfaction	4.15	4.14

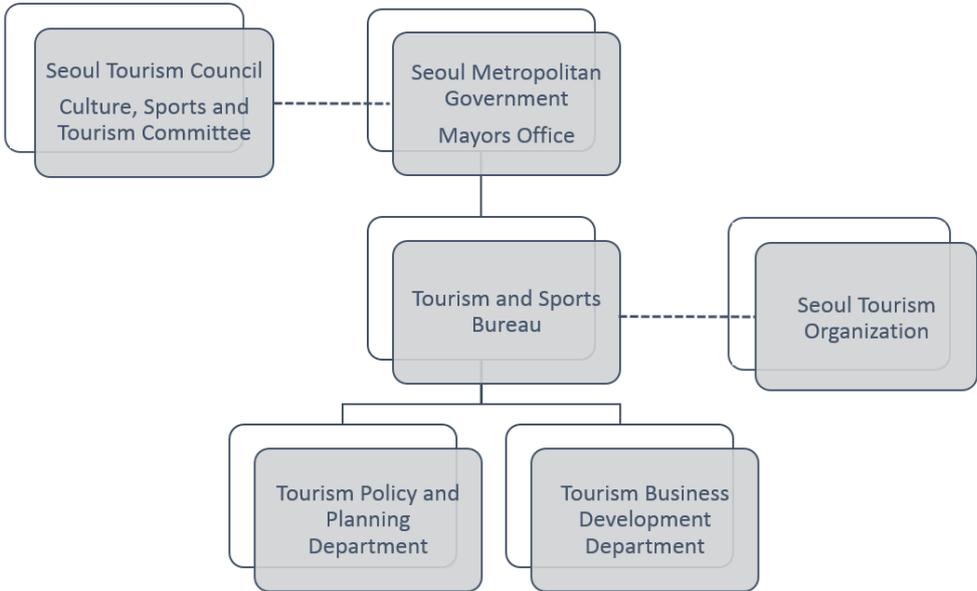
Source: Seoul Metropolitan Government (2016), *Seoul City tourism satisfaction index report*.

2.2 Seoul City tourism destination management arrangements

The Seoul Metropolitan Government (SMG) recognizes that tourism is a strategic growth sector because of its extensive backward and forward linkages with other sectors of the Seoul City economy creating in the process significant income and employment opportunities for the people of the city. Tourism is also seen as a way to revitalize Seoul as an attractive place to live in and to visit.

SMG’s destination management organization comprises three units:

Figure 2.2 Seoul tourism destination management organization



Source: Seoul Metropolitan Government

- Within the newly installed Tourism and Sports Bureau of the SMG, there is a tourism division comprising two departments that is responsible for tourism policy and planning, and tourism business development;
- the Seoul Tourism Organization, which is a public enterprise (Seoul Tourism Marketing Co. Ltd) is responsible for marketing Seoul City in domestic and international markets as a tourism and MICE destination;
- the Seoul Tourism Development Council which comprises a collaborative

council of industry, community, and academic stakeholders to advise the City on tourism policy and initiatives.

The SMG Tourism and Sports Bureau is staffed by 44 people, while the Seoul Tourism Organization is staffed with around 90 people organized into ten teams. Whilst there is direct coordination between the SMG Tourism and Sports Bureau and Seoul Tourism Organization, coordination with the Seoul Tourism Development Council is achieved through the office of the Mayor. In addition, it is noted that in line with its collaborative decision making approach, SMG through the Seoul Tourism Organization creates private consultative bodies for key initiatives such as Seoul MICE Alliance, Korea-wave tourism, medical tourism and fair tourism in order to frame approaches, expand participation and obtain feedback on results.

3.0 Seoul City tourism performance survey findings

The UNWTO-WTCF City Tourism Performance Research Survey includes five key performance areas:

1. Destination management;
2. Economic impact;
3. Social and cultural perspective;
4. Environmental perspective; and
5. Technology & new business models.

Based on initial desk-based research, and in consultation with Seoul Tourism Organization and Korea Tourism Organization, two key performance areas were identified for further investigation – Social and Cultural Perspective and Technology & New business Models Perspective.

Data on the performance indicators under each performance criteria were collected from official data sources at the city level. In addition, on-site interviews were conducted with Seoul Tourism Organization, Korea Tourism Organization, SMG Tourism and Sports Bureau, Transport Operation and Information Service (TOPIS), Kyonggi University, Seongbuk Cultural Center, Seoul Design Foundation, and Samhae Soju Brewery officials and other tourism stakeholders to gain a more detailed understanding of the city.

Table 3.1 The UNWTO-WTCF City Tourism Performance Research Survey

Key Performance Area	Definition	Assessment Criteria	Initial Assessment Score	Rank
Destination Management	Includes visitor and destination management and organization (DMO) perspective	Destination governance & management criteria Visitor satisfaction criteria	Good ****	3
Economic Impact	Related to economic criteria and value of growth	Tourism flows Economic impacts of tourism at destination	Good ****	3
Environmental Perspective	Sustainability and environmental criteria	Sustainable tourism strategy & regulations (recycling, energy saving, air and water quality etc.) Mobility Public green spaces	Good ****	3
Social and Cultural Perspective	Social and cultural impacts of tourism	Cultural resources (tangible and/or intangible) Social impacts of tourism Community attitude and engagement Safety & security (crime rates) Authenticity	High *****	2
Technology and New Business Models	Technology use at the destination regarding the governance, transportation, and innovation related criteria	Smart City Open data Peer economy Internet connectedness Public transport (mobility) Innovative products and services	Very High *****	1

4.0 Social and cultural perspective

Table 4.1 Social and cultural perspective key performance criteria

Performance criteria	Yes ✓ / No X
4.1 Attractions Number of cultural resources/Attractions Percentage of municipal budget allocated to culture Investment in conservation and restoration Percentage of local heritage needing improvement	✓ ✓ ✓ ✓
4.2 Events Percentage of business events Percentage of leisure events Percentage growth in hosted events last 5 years Percentage growth in event participation last 5 years Percentage events based on traditional/local cultural heritage	✓ ✓ ✓ ✓ ✓
4.3 Community attitude Percentage of residents satisfied with tourism at destination Percentage of residents satisfied with impact of tourism on destinations identity Number of tourists/visitors per 100 residents in destination Number of beds available in commercial accommodation establishments per 100 residents	X X ✓ ✓
4.4 Community engagement Percentage of population that participates in community engagement programs Percentage of employees in direct tourism employment that are local	✓ ✓
4.5 Gender equality Percentage of men and women employed in tourism sector Percentage of tourism enterprises where the general manager position is held by a women	✓ ✓
4.6 Inclusion Percentage of businesses that have a budget for accessibility improvements Percentage of rooms in commercial accommodations accessible to PWDs Percentage of commercial accommodation establishments participating in recognized accessibility information schemes Percentage of public transport accessible to PWDs and/or participating in recognized accessibility information schemes	✓ ✓ ✓ ✓
4.7 Safety and security Comparison of crime rates between high and low season Comparison of crime rates between tourist centers and other parts of the city Percentage of tourists registering a complaint with the police	✓ ✓ X
4.8 Authenticity Is the destination leaning towards neighborhood tourism or built artificial tourist quarters Elaboration on tourism product authenticity at the destination (e.g. gastronomy, local culture, traditions, etc.)	✓ ✓

4.1 Attractions

Cultural resources/attractions: The city has over 2,236 listed cultural resources/attractions of which 1,618 comprise cultural attractions, 156 comprise museums, 381 comprise theatres, and 81 comprise cinemas. The major cultural attractions include:

- Major historical sites such as Gyeongbokgung Palace, Changdeokgung Place, Changgyeonggung Palace, Deoksugung Palace, Jongmyu (Royal Shrine) and Seoul City Wall among others;
- Major cultural attractions such as Leeuym Samsung Museum of Art, National Museum of Modern and Contemporary Art, Seoul Museum Kinchikan, Namdaemun Market, Namsangol Hanok Village, Bukchon Hanok Village, among others as well as many colorful festivals throughout the year; and
- A large range of amusement and entertainment attractions such as N Seoul Tower Observatory, MBC World, K-Live, Trickeye and Ice Museum, Grevin Seoul, Figure Museum W, Alive Museum, as well as cinemas, urban resorts and casino gaming outlets among many others.

The city offers the classic Korean gastronomic experience as well as a large variety of international cuisine, shopping, nightlife, entertainment and amusement to its leisure, business, MICE and special interest international visitors. The city is the birthplace of K-pop and Korean Wave creating new markets especially among the Asian millennial segments.

Percentage of municipal budget allocated to culture: Of the city’s annual budget in 2016, USD 1.738 billion, around USD 41.7 million or 2.4% is allocated to the administration and operation and maintenance of the city’s cultural assets.

Investment in conservation/enhancement of cultural infrastructure:

The city has already achieved a high state of local heritage protection and has worked to create new cultural infrastructure of interest to residents and tourists alike the best examples of which are the Elevated Arboretum “Seoullo 7017”, which is an overpass constructed in 1970 and converted into a 1,024 m long pedestrian walkway. Opened in May 2017, and forming a key component of Seoul’s vision of “Seoul, a Great City for Walking”, the project is an innovative example of urban development focused on urban regeneration, adaptive reuse, and pedestrian rights that has revitalized the heart of Seoul by reconnecting traditional and modern parts of the city for residents, workers, and tourists. The project is to be expanded to create 17 pedestrian paths connecting major rail and bus transportation terminals, shopping

areas, offices and mountain walks.¹⁰

Figure 4.1 Seoul City pedestrian walkways



Another key addition to Seoul’s cultural and attraction infrastructure is the development of Green Trails in Seoul involving development of a 25 km long pedestrian path within the four gates of Seoul including the Seoul Dulle-gil Trail (Seoul City Wall Trail) that exposes visitors to the charms of Seoul City and explores its history, culture, and natural environment. Comprising eight sections, over a total of 157 km, the Dulle-gil trail includes 85 km of forest/mountain walks, 40 km of streamside walks, and 32 km of neighborhood walks.¹¹

Figure 4.2 Seoul Dulle-gil Trails



¹⁰ Seoul Metropolitan Government (n.d.), 7017 (online) available at: <http://seoullo7017.seoul.go.kr> (15-07-2017).

¹¹ Seoul Metropolitan Government (n.d.), Seoul Dulle-gil spring (online) available at: www.seoul.go.kr (15-07-2017).

Percentage of local heritage needing improvement: Although the percentage of historic heritage requiring improvement is quite low, the city is undertaking two initiatives to diversify and decentralize its cultural heritage attractions. To diversify its cultural heritage base, Seoul City is already working on a project to transform its modern tangible and intangible heritage legacy from the 1960s to the 1980s into future heritage based on three initiatives:

- selection of historical sites related to notable figures or stories of the city’s citizens for future preservation;
- the House of Yun Geuk-yeong, the composer of the first Korean children’s song “Half Moon” was selected as a pilot project for future heritage preservation in 2014; and
- a total of 345 future heritage sites have been selected including a long-standing barbershop and a 100-year-old tailor shop.

Figure 4.3 Traditional Soju production craft



To date, over 1,600 Seoul Future Heritage candidates have been identified based on proposals from citizens and experts of which 345 have been selected and endorsed through agreements by the owners. Issued with certificates, the sites have been tagged with an identifying mark encouraging their preservation and leading citizens to recognize the value of preserving future tangible and intangible heritage assets.

Through its Traveling Towns in Seoul Project, the city is decentralizing and decongesting the traditional tourist villages closer in to the city. The project that has been in operation since 2013 allows communities composed of local residents, artists, and local merchants to discover the distinctive tourism resources hidden in their local neighborhoods, which can then be developed and promoted as a tourist product. So far, seven autonomous districts were selected after a second round of screening of the project plans submitted by 17 autonomous districts, and the selected projects are being implemented in earnest as of May, 2017.

Table 4.2 Traveling Towns in Seoul project summary

No.	District	Project name	Project themes
1	Gangbuk-gu	A healing tour of history and culture in our neighborhood	Modern and contemporary history
2	Gwanak-gu	Gwanak, walk the road of democracy	Modern and contemporary history
3	Dongjak-gu	Time travel along the Chunghyo-gil	History, culture, nature
4	Seongdong-gu	The regenerated city of Seongsu! A journey of stories	Industrial resources and social economy
5	Seongbuk-gu	A village trip in Bomun-dong and Anam-dong	History, culture, nature
6	Yangcheon-gu	Picnic Season 2 - A few guides to look into Yangcheon	Industrial resource
7	Jungnang-gu	<Alley trip> Sangbong atelier street: a secret door	Industrial resource

Source: Seoul Metropolitan Tourism Office (2017), *Traveling towns in Seoul*.

To date, the city has selected 30 projects between 2013 and 2017 and supported them with a fund of KRW 1.65 billion (around USD 1.468 million as at 30 July 2017).

In addition, Seoul is not only exploring and utilizing the distinct tourism resources of the region, but it is also operating the "Fair Tourism Traveler Training Program" to develop distinctive and differentiated tourism resources as effective tourism products. In this manner, Seoul plans to secure the diversity and sustainability of the Traveling Towns Projects.

4.2 Events

As noted earlier, Seoul has three major purpose-built MICE venues with total of 180,536 m² to cater to business and other events. They are COEX with 106,612 m², aT Center with 58,294 m², and SETEC with 15,630 m². As well, Seoul has major hotel convention facilities such as the Grand Hilton Seoul with 78,193 m² of meeting and convention space, the Grand Hyatt Seoul with 73,271 m² of space and the Mayfield Hotel with 108,786 m² of meeting and convention space.

The SMG recently called for developing the KEPCO land, along with the adjacent

COEX complex, into a new hub for the country's MICE industry. COEX:

- is Korea's top venue for international Conventions & Exhibitions;
- has a total area of 106,612 m²;
- has 54 meeting rooms; and
- 36,077 m² of exhibition space.

Figure 4.4 COEX



Along with other MICE projects under construction and scheduled for completion in 2020, this is likely to take the total dedicated MICE space in Seoul to around 300,000 m² and cementing its place as a global MICE destination.

Percentage of business events: Seoul's percentage of business events comprises 77.7% of national events, and 22.3% of international events.

Percentage of leisure events: The city's share of leisure events in 2016 was 67.9% of the total national events, and 32.1% of total international events held.

Percentage growth in hosted events: The annual average rate of growth in terms of interest in hosting events in Seoul over the past five years between 2012 and 2016 has been 27.4% and is a major driver underpinning the expansion of MICE facilities noted above.

Percentage growth in event participation: In terms of visitor participation at events in Seoul over the past five years, the annual average rate of increase in visitor participation has been 4.8%. Limited venue capacity is reported as a major factor for

the lower visitor participation growth rate.

Percentage events based on traditional/local cultural heritage: Of the total number of events held in 2016, 60.2% focused on traditional and local culture and heritage.

4.3 Community attitude

In the past, Korean tourism policy has focused on the quantitative expansion in the number of inbound tourists with substantial results and no surveys of resident satisfaction with tourism in their areas were undertaken. Although Seoul has 25 districts, most of its tourism is concentrated into a few destinations or precincts in the inner part of the city such as Bukchon Hanok Village and Namsangol Hanok Village. Here, substantial increased tourist traffic has generated growing concern among residents who report growing dissatisfaction with tourism in their area. Starting in 2016, the Tourism and Sports Bureau of SMG has been conducting projects to bring about a more sustainable pattern of tourism in which the needs of local communities are fully included in the tourism planning, development and operational components of destinations.

Percentage of residents satisfied with tourism at destination: Quantitative and qualitative surveys of residents in Seoul's main tourist centers such as Bukchon Hanok Village have only recently begun in response to a growing community concern about the impact of tourism in their area. Although the results of the quantitative surveys are yet to be concluded, qualitative surveys based on community discussions found that residents were increasingly concerned with noise pollution at 70+ decibels for much of the day and night, crowding and congestion, conversion of traditional shops to tourism outlets, rising prices for goods and services, and competition for space with residents. The results of feedback from residents indicate that the central Seoul City tourist precincts are at or already beyond their acceptable carrying capacity and that satisfaction levels are falling.

Finding an acceptable balance between the needs of residents and tourists is of

growing concern to the city. As a result, the city is now re-shaping its tourist destination policies towards developing quality tourism rather than quantity tourism, and to disperse tourists into a larger number of tourist precincts in other districts. In this context, Seoul City is supporting the local district offices to create regional tourist contents and programs.

Percentage of residents satisfied with impact of tourism on destinations identity: As indicated by qualitative surveys conducted by the Tourism and Sports Bureau of SMG, there is a growing concern among residents that the identity of their neighborhood has changed. Although qualitative surveys are being undertaken currently, the city is moving to change its destination development policy away from quantity towards quality and diversity.

Number of tourists/visitors per 100 residents in destination: In 2015, the ratio of tourist/visitors per 100 residents in Seoul City was 222.

Number of beds available in commercial accommodation establishments per 100 residents: The number of beds available in commercial accommodation establishments per 100 residents in 2015 was 1.08, i.e. just over one commercial accommodation bed per resident.

4.4 Community engagement

Percentage of population that participates in community engagement programs: Based on participation rates in the Seoul Volunteer Center, the SMG Tourism and Sports Bureau estimates that around 20% of the population participates in community engagement programs.

Percentage of employees in direct tourism employment that are local: Although specific data on the ratio of local residents directly employed in tourism to total employment including foreigners is not available for Seoul, the SMG Tourism and Sports Bureau estimates this percentage to be quite high at +95% of the 480,090 people employed in its 126,785 commercial accommodation and restaurant

establishments.

4.5 Gender equality

Percentage of men and women employed in tourism sector: According to the Ministry of Culture, Sports and Tourism, in 2015, 52.2% of those employed were men, and 47.8% were women.¹²

Percentage of tourism enterprises where the general manager position is held by a woman: According to Statistics Korea, in 2014, the Report of the Census on the Basic Characteristics of Tourism Establishments found that 62.9% of accommodation and restaurant businesses, and 42.8% of arts, sports and leisure services were managed by a woman.¹³

4.6 Inclusion

The SMG has an affirmative social inclusion policy targeting the elderly, the disabled, traditional merchants, foreigners, women, youth, small businesses, culture and arts circles, tourism, urban safety, environmentalists, and young adults. Through a system of honorary vice-mayors, SMG gathers opinions and voices from the field to reflect them in the city's policies and administration. Beginning with the appointment of three honorary vice-mayors for the "elderly," "the disabled," and "the youth" in 2012, a total of 12 honorary vice-mayors in different fields have since been appointed, with 678 activities receiving active participation – including meetings and discussions, events such as the opening of the Seoul Senior Center, and inspections of traditional markets. Seoul values communication with its residents and has developed a number of innovative ways to give citizens access to decision making, including "Open Mayor's Office", policy debates, Live Seoul, street-side opinion gathering booths, and a Citizen's Office.¹⁴

¹² Ministry of Culture, Sports and Tourism (2016), *Census on the basic characteristics of tourism establishments 2015*, Seoul.

¹³ Statistics Korea (2015), *Census on the basic characteristics of tourism establishments 2014*, Seoul.

¹⁴ Seoul Metropolitan Government (2017), *Diversifying communication channels – honorary vice-mayor* (online) available at: www.seoul.go.kr (15-07-2017).

Percentage of businesses that have a budget for accessibility improvements:

The SMG estimates that 9.5% of businesses have a budget for accessibility improvements.

Percentage of rooms in commercial accommodations accessible to PWDs:

According to the Korea Ministry of Government Legislation (2017), around 0.5% of the country’s rooms in commercial accommodation establishments are accessible to people with disabilities. Although data on Seoul is not available, it is estimated by the SMG Tourism and Sports Bureau that the ratio in the city is likely to be much larger than the national average – estimated at between 3 to 5%.

Percentage of commercial accommodation establishments participating in recognized accessibility information schemes:

According to SMG Tourism and Sports Bureau estimates, 12.31% of commercial accommodation establishments participate in recognized accessibility information schemes.

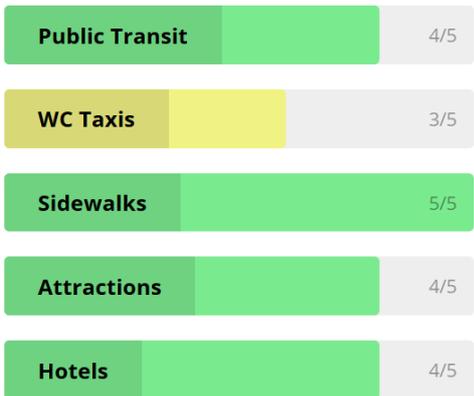
Percentage of public transport that is accessible to PWDs and/or participating in recognized accessibility information schemes:

According to SMG traffic data¹⁵, 38.65% of public transportation is accessible to PWDs and/or participating in recognized accessibility information schemes.

Percentage of tourist attractions that are accessible to people with disabilities and/or participating in recognized accessibility information schemes:

Although data on the percentage of tourist attractions that are accessible or participating in accessibility schemes is not collected, a sample of attractions suggests that up to 40% are accessible to PWDs.¹⁶

Figure 4.5 Wheelchairtravel.org accessibility rating for Seoul



¹⁵ Seoul Metropolitan Government (n.d.) *Traffic data* (online) available a
¹⁶ Including Namsan Cable Car & Seoul Tower, Myeongdong neigh Palace, National Folk Museum of Korea, Cheonggyecheon St Cup Stadium, the Namdaemun Gate, and The War Memorial of

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orld

Another indication of the extent of accessibility is a wheel chair accessibility score prepared by Wheelchairtravel.org for Seoul.¹⁷ With attractions and hotels in Seoul scoring 4 out of 5 on the index, this suggests that the city is PWD friendly.

4.7 Safety and security

The Korea Tourist Police unit was launched in October 2013. Stationed in popular tourist areas, such as Myeongdong, Itaewon, Dongdaemun, Insadong, Hongdae, Cheonggyecheon, and SMG city hall, this special police force provide diverse services for tourists and are charged with preventing crime and other illegal activities, handling complaints, and providing tourist assistance. A total of 101 tourist police have been selected through a highly competitive process and have pledged to do their best to ensure that all visitors to Korea have a safe and enjoyable trip.

Table 4.3 Korea Tourist Police Main Duties

Duties	Activities
Tourist protection and crime prevention	Patrol 7 major tourist areas in Seoul to protect tourists and prevent crime
Discourage illegal activities	Confront perpetrators of unfair and illegal activities, such as overcharging for goods/services, pressuring tourists to purchase goods, and running illegal “call vans”
Tourist assistance and translation services	Provide tourist assistance and translation services in English, Japanese, and Chinese
Complaints from Tourists	Quickly address any inconveniences or complaints that arise at or near tourist attractions

Source: Seoul Metropolitan Government (n.d.), *Korea tourist police* (online) available at: <http://english.seoul.go.kr> (17-07-2017)

Comparison of crime rates between high and low season: According to the Korean National Police Agency, the high season months of May to October accounts for 52.2% of the crime rate in 2016 compared to 47.8% in the low season months of January to March, and November to December.¹⁸ This suggests that tourism along with weather may be a factor in the increased level of crime during the high season.

¹⁷ Wheelchairtravel.org (n.d.), *Seoul South Korea wheelchair accessible travel guide* (online) available at: <https://wheelchairtravel.org> (17-08-2017).

¹⁸ Korean National Police Agency (n.d.), *Statistics* (online) available at: <http://www.police.go.kr/> (18-07-2017).

Comparison of crime rates between tourist centers and other parts of the city:

According to the Korean National Police Agency, the crime rate in tourist centers was 53.5% in 2016 compared to 46.5% in other areas of the city.¹⁹ This suggests that tourism may be a causal factor for the higher tourist center crime rates along with the fact that most of the centers are inner city centers that receive a large transient working population.

Percentage of tourists who register a complaint with the police: Data on the percentage of tourists who register a complaint with the police is not available. However, the presence of a strong tourism police force located in the main destinations of the city helps to ensure that tourists are less likely to fall victim to crime.

4.8 Authenticity

Is the destination leaning towards neighborhood tourism or built artificial tourist quarters: As noted earlier, the SMG has moved to a policy of diversified quality tourism that is grounded in the development of sustainable neighborhood tourism and linking of neighborhoods through the Seoul Dulle-gil Trail (Seoul City Wall Trail) development and the Traveling Towns in Seoul Project. At the same time, in keeping with its role as a leading world tourism city balancing historic heritage and culture with modernity, the SMG continues to encourage the development of mixed use MICE, hotel, shopping and leisure and entertainment complexes.

Elaboration on tourism product authenticity at the destination (e.g. gastronomy, local culture and traditions, etc.): Seoul’s food is a major factor in attracting visitors to the city. Korean cuisine uses a large range of fresh ingredients to create diverse flavors and nutritious, healthy meals

Figure 4.6 Korean gastronomy



¹⁹ Korean National Police Agency (n.d.), Statistics (online) available at: <http://www.police.go.kr/> (18-07-2017).

and is well received by its visitors. Korean food is relatively inexpensive but of high quality, and can be found in restaurants running late into the night and even on a 24-hour basis. The majority of tourists find Korean cuisine suitable to their taste, and dining out is a frequent activity of visitors.

Seoul is a city that embraces the beauty of both tradition and modernity. With five ancient palaces and five World Heritage Sites designated by UNESCO, Seoul is a living history of over 600 years as the capital of the Choseon Dynasty. Seoul makes it possible for visitors to experience what life was like in the past at Hanok villages (traditional Korean houses), learn to make kimchi and traditional handicrafts, learn taekwondo, try making makgeolli (Korean rice wine), and try a temple stay.

Overall, many exciting and unique experiences await the visitor to Seoul. Seoul also boasts a strong foundation for information technology, providing access to the Internet from any location and various applications in people’s daily lives. The city features ubiquitous—based services, digital pavilions, and an exhibition space at Samsung Electronics, offering new and futuristic experiences in high-tech IT.

For fans of K-Pop, K-Dramas, and K-TV Shows, there are many reasons to visit Seoul. See Cheon Song-yi’s beauty shop in “My Love from Star”, cafes frequented by Lee Min-Ho, and shopping spots beloved by BigBang! Dramas are filmed all over Seoul, giving the chance that that the visitor might spot a Hallyu celebrity on the streets.

Figure 4.7 Examples for K-Pop and K-Damas photo spots



5.0 Technology and new business models

Table 5.1 Technology and new business models key performance criteria

Performance criteria	Yes ✓ / No X
5.1 Peer economy	
Number of shared accommodations (i.e. Airbnb, couchsurfing)	✓
Car and bike sharing platforms	✓
Number of shared bicycles per capita	✓
Number of shared vehicles per capita Consumers selling guiding services in place (e.g. paying a local for a guided tour)?	✓
Car-pooling (consumers trading their own vehicles and/or selling transfer services) in place?	✓
5.2 Smart city	
Number of open wi-fi spots per km ²	✓
Number of infrastructure components with installed sensors	✓
Number of services integrated in a singular operations center leveraging real-time data. One point for each: ambulance, emergency/disaster response, fire, police, weather, transit, air quality	✓
Are there any initiatives undertaken by DMO that look into online brand measurement?	X
5.3 Internet connectedness	
Number of internet connections per 100,000 population	✓
% of Internet-connected households, % of residents with smartphone access	✓
% of commercial and residential users with internet download speeds of at least 2 mbps	✓
% of commercial and residential users with internet download speeds of at least 1 gbps	✓
5.4 Open data	
Number of mobile apps available (iPhone) based on open data	✓
Existence of official citywide privacy policy to protect confidential citizen data	✓
5.5 Government services	
% of government services that can be accessed by citizens via web or mobile phone	✓
Existence of electronic benefit payments (e.g. social security) to citizens	✓
5.6 Public transport	
% of traffic lights connected to real-time traffic management system	✓
Number of public transit services that offer real time information to the public:	✓
Availability of mobile app for public transport (e.g. purchase tickets, schedule and map of all public transport services)	✓

5.1 Peer economy

Number of shared accommodations (i.e. Airbnb, couchsurfing): There are about 63,594 shared units in Seoul, based on data derived from www.airbnb.com.kr; www.kozaza.com.co; www.bnbhero.com.co; and www.couchsurfing.com.

Car and bike sharing platforms: The SMG has a car sharing platform based on www.seoulnumcar.com, and a bike sharing platform based on www.bike.seoul.go.kr.

Number of shared bicycles per capita: The Public Bicycle Comprehensive Status Report of the Seoul Metropolitan Facilities Management Corporation recorded 0.08 shared bikes per capita in 2017.²⁰

Number of shared vehicles per capita: A news article²¹ posted by the SMG indicated that in 2016, there were 3,377 shared cars with 897,000 members generating around 4,200 users per day or 1.53 million uses per year. In a report cited by Korea Bizwire²², it is indicated that shared vehicle usage is growing at the rate of 60% per annum. The vehicles classified into ordinary vehicles and electric vehicles and it is expected that electric shared vehicles will be the fastest growing sector.

Consumers selling guiding services in place: Data on sales of guiding services is not collected but based on observation of guide usage in some of the main tourist centers, probably around 5% to 10% of visitors avail guided tours in those areas.

Car-pooling (consumers trading their own vehicles and/or selling transfer services) in place: There are several carpooling organizations in Seoul such as Carpool Korea and SOCAR, among others, that offer access to more than 8,100 vehicles with over 26 million users per annum increasing by up to 60% per annum.

5.2 Smart city

Number of open wi-fi spots per km²: The SMG set up 8,679 APs which covers 19.5 km² (2,694 areas) in cooperation with three major telecom communication companies. The size of the WIFI service area is 2.8 km² per 1 AP.

Number of infrastructure components with installed sensors (one point for each: traffic, public transit demand, parking, air quality, waste, H2O, public

²⁰ Seoul Metropolitan Facilities Management Corporation (2017), *Public bicycle comprehensive status report*, Seoul.

²¹ Seoul Metropolitan Government (2017), *Developing solutions together with sharing* (online) available at: <http://english.seoul.go.kr/> (20-07-2017).

²² The Korea Bizwire (May 2017), *Seoul's car and bicycle sharing services prove popular* (online) available at: <http://koreabizwire.com/> (17-08-2017).

lighting): It is difficult to determine the number of infrastructure components with installed sensors in Seoul because companies install sensors in Seoul's public spaces with permission by the district governments and each division manages their own sensors. Currently, the SMG use sensors for traffic, public transit demand, parking, air quality, H2O and public lighting. The sensors for traffic alone is over 30,000 CCTV units.

Number of services integrated in a singular operations center leveraging real-time data: Real time data about ambulance, emergency/disaster response, fire, police, weather, transit and air quality are provided to the Digital Office for Citizens and Mayor platform (dash board) and TOPIS Center (Traffic & CCTV monitoring center which is connected to police, weather forecast center and more).

Are there any initiatives undertaken by DMO that looks into online brand measurement: No.

5.3 Internet connectedness

Number of internet connections per 100,000 population: According to the Korea Statistical Information Service, in 2016, there were 83% Internet connections per 100,000 head of population.²³

Percentage of Internet-connected households, % of residents with smartphone access: According to the Korea Statistical Information Service, in 2016, 83% of households were Internet connected, and 83% of residents had smartphone access.²⁴

Percentage of commercial and residential users with internet download speeds of at least 2 mbps: According to the Korea Information Society Development Institute 2016 Panel Media Research Study, 100% of commercial and residential

²³ Korean Statistical Information Service (n.d.), *Survey on the Internet usage* (online) available at: <http://kosis.kr/> (20-07-2017).

²⁴ Korean Statistical Information Service (n.d.), *Survey on the broadcasting media usage* (online) available at: <http://kosis.kr/> (20-07-2017).

users have Internet speed exceeding 2 mbps.

Percentage of commercial and residential users with internet download speeds of at least 1 gbps: According to Statistics Korea, 33.5% of commercial and residential users have Internet download speeds of at least 1 gbps.²⁵

5.4 Open data

Number of mobile apps available (iPhone) based on open data: In 2016, there were 42 open data applications available in Seoul.

Existence of official citywide privacy policy to protect confidential citizen data: The SMG has its own privacy policy that complies with the Personal Information Protection Act enacted nationally in 2011 by the Central Government.

5.5 Government services

Percentage of government services that can be accessed by citizens via web or mobile phone: It's hard to measure the percentage of the government services that can be accessed by citizens via web or mobile phone. The SMG has a facility for receiving civil complaints and policy proposals through a website called, Eungdapso. Eungdapso provides 100 on-offline services that citizens can connect to regarding attaining certificates, establishing organization, business registration, transportation, construction, waterworks, local taxes and dispute conciliation and only 8 services requires visit to the city hall.²⁶

Filing taxes, finding public parking spaces and sharing cars, paying for utility, etc. are possible through online and mobile access. However, registration for a marriage, birth and death require visit to the district offices.

²⁵ Korean Statistical Information Service (n.d.), *Survey on the Internet usage* (online) available at: <http://kosis.kr/> (20-07-2017).

²⁶ Seoul Metropolitan Government (2017), *Diversifying communication channels – Eungdapso* (online) available at: www.seoul.go.kr (15-07-2017).

Existence of electronic benefit payments (e.g. social security) to citizens: Yes, there are electric benefit payment systems such as Etax (<https://etax.seoul.go.kr/>). Citizens pay their auto tax, local tax, property tax, etc. through the website. Citizens can also get mileage for cutting down energy consumption at home or their businesses through their Eco-Mileage System (<http://ecomileage.seoul.go.kr/home/>).

5.6 Public transport (mobility)

Percentage of traffic lights connected to real-time traffic management system:

According to the Transport Operation and Information Service (TOPIS) that operates an integrated real-time traffic management system in Seoul, 100% of traffic lights in the central city area are connected to the system mediated by around 30,000 CCTV units illuminated at the TOPIS control center.²⁷

The Seoul City Highway Traffic Control Center provides citizens the real-time traffic information via VMS, Internet and Fax with the aim of smoothing inconveniences and easing traffic congestion on major highways including Naebusunhwan-ro (inner circular highway), Gangbyeonbuk-ro, Olympic-daero, Bukbuganseon-doro, Bukbuganseoun-doro, Dongbuganseon-doro, and the Gyeongbu Expressway with the data collected and analyzed using a high-tech video meter and CCTV installed on these roads. In addition, the center provides real-time traffic information, video data, the 'fastest route' search service, travel time information, and traffic statistics and data.

Number of public transit services that offer real time information to the public:

Seoul TOPIS provides users with bus route maps, real-time bus departure and arrival information, and a 'fastest route' search service based on real-time information on traffic conditions for each section of road, as well as comparing optimum routes and diverse transport methods including car, bus, and subway.²⁸

²⁷ Transport Operation and Information Service (n.d.), *TOPIS system service* (online) available at: <http://topis.seoul.go.kr/> (22-07-2018).

²⁸ Seoul Metropolitan Government (n.d.), *Traffic information in real time* (online) available at: <http://english.seoul.go.kr/> (22-07-2017).

Availability of mobile app for public transport (e.g. purchase tickets, schedule and map of all public transport services): There are several apps available in Seoul for use by the public including tourists including: “Naver Maps” for painless commutes and “Daum Maps” that includes local outlet information; subway apps such as “Metroid”, “Jiachul”, “Smart Subway”, and “Subway Korea”; booking apps such as “Taxi Help”, “Kakao Taxi”, “Seoul Bus”, and “Korail Talk” apps; among others.

6.0 Seoul tourism issues and challenges

Based on the results of the survey on the social and cultural and technology and new business models, the following issues and challenges emerged:

- In the case of the social and cultural aspect of Seoul City tourism, the core challenges are:
 - diversifying its tourism areas to handle substantial future increases in international tourism (the 2019 target is 20 million)
 - reducing the pressure on existing tourist areas in order to provide a more acceptable living experience for residents in these areas; and
 - developing a fairer distribution of tourism benefits across the 17 SMG districts.
- In the case of the technology and new business models aspect of Seoul City tourism, the core challenges are:
 - leveraging real-time data for on-line brand management and visitor satisfaction attitudes data;
 - planning for the application of IoT interconnection in the tourism sector; and
 - the challenge of picking start-up winners.

As noted, SMG is already addressing the product diversification, pressure reduction, and fairer distribution challenges. However, the medium to long term development cycle to initiate diversification, pressure reduction and fairer distribution of benefits is likely to clash with the high targets for international tourism set in the short term (20 million by 2019). Thus, the transition to a greater number of sites and more distributed pattern and benefits of tourism may prove difficult. Given that there is already a concern over Seoul's reliance on one international market—China—it may be more prudent for the SMG to focus on raising yield rather than volume in the short term to 2020 and moving back to a higher tourism volume strategy after the diversified tourism sites are in place.

In the case of the technology and new business aspect of Seoul tourism, greater attention could be given to leveraging real time mobile data systems for on-line brand

management, and for collecting data on visitor attitudes and opinions about their Seoul visit. Whilst SMG is already supporting a robust tourism startup program, it is noted that the private sector venture capital companies are usually more efficient at identifying winners than the public sector. Consideration might thus be given to outsourcing the function to private venture capital forms experienced in the tech startup arena. SMG's seed capital if matched by the venture capital companies could then be leveraged to significantly expand the program and number of successes achieved.

7.0 Showcase: Best practice examples

7.1 Social and cultural perspective

Elevated Arboretum: Seoulo 7017

Rationale: With the adoption of a new integrated public transportation system and rapid growth of shared private vehicle transportation services, the volume of vehicle traffic has declined significantly with many former overpasses slated for demolition. Based on examples of other cities such as London, Copenhagen, Barcelona, and Paris that adopted a “walkable cities” and “walkable tourism” policies, SMG adopted its vision of “Seoul, a Great City for Walking” that has led to the conversion of the overpass in the vicinity of the historic Seoul Station precinct into a pedestrian road called “Seoulo 7017, that has reconnected 17 historic parts of the inner city and provided increased amenity to its residents and tourists.

Main Features: Based on the award winning design of Winy Maas, a world-renowned architect known for the structures Maquinnext (2012) in Barcelona, Spain, and Market Hall (2014) in Rotterdam, the Netherlands, Seoulo comprises:

- a 1,024 m long pedestrian walkway in an arboretum setting with 17 paths linking to key historic points in vicinity of the Seoul Station area including Sungnyemun Gate, Seoul Fortress Wall, Myeong-dong, and Namdaemun Market;
- a total of 24,085 trees and plants of 228 species and 50 families that are endemic to Seoul and capable of growing on artificial ground, such as shade plants and perennial flowers;
- eighteen shops, conveniences, and amenities, including a café, outdoor stage, flower shop, flowerpot benches, and the Rose Stage and Magnolia Stage;
- four 17 m elevated balconies, located near the Seoul Station, Sungnyemun Gate, Jungnim-dong, and Cheongpa-dong areas to give citizens and visitors places to enjoy the panorama of the heart of Seoul;
- creation of plazas beneath Seoulo 7017 such as Malli-dong Plaza featuring 18 benches and water fountains where citizens and visitors can enjoy the view of trees rarely seen in Seoul.



In the near future, it is intended that Seoulo 7017 will be connected to the Seoul Fortress and Seoul Dulle-gil trails, people will be able to enjoy the history and nature of Seoul while walking through the city’s center.

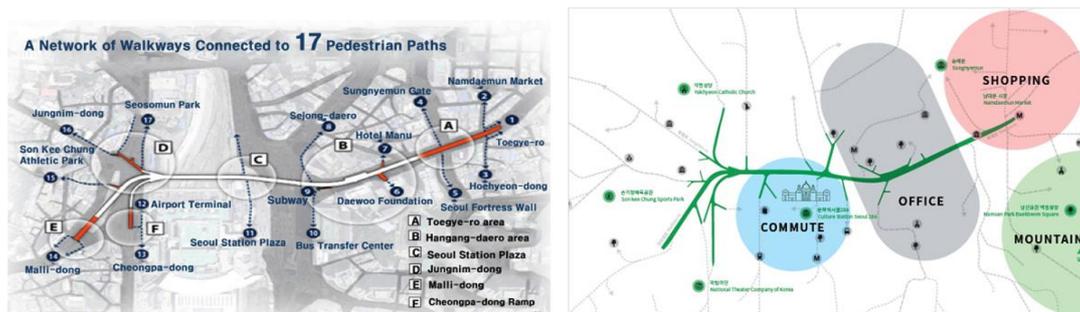
Good Practice Demonstration: Seoulo illustrates good practice in adopting adaptive reuse strategies to revitalize inner city areas for residents and visitors by reconnecting nearby amenities and attractions, and as the hub for an extended city walk system.

Seoul as “A Great City for Walking”

Rationale: With the adoption of the vision of “Seoul, as “A Great City for Walking,” SMG has worked to develop a number of thematic walks into an integrated Seoul Metropolitan City Walks offering that is a key element in the SMG’s strategy to diversify and spread the benefits of tourism more widely across Seoul’s 17 districts.

Main Features: The package of city walks include:

- The 25 km long Four Gates Pedestrian Walk located within the four gates of Seoul is a circular road that begins from Seoulo 7017, passes through Jeongdong, an area full of modern and contemporary architectural assets from the period of the Korean Empire and afterwards, as well as Insa-dong, Dongdaemun, and Myeong-dong, and finally leads back to Seoul Station.
- The Seoul Dulle-gil Trail runs around the outskirts of the Seoul Metropolitan area comprising eight courses spanning a total of 157 km of which 80 km are forest walks, 40 km are streamside walks, and 32 km are neighborhood walks. If you were to walk for eight hours a day, you could cover the entire length of the trails, taking you all around Seoul, in about 10 days.
- The Barrier Free Forest Trails first created on Gwanaksan Mountain in May 2013, comprise barrier-free forest trails through wooded areas with gradients of less than eight percent (as per the requirements for facilities for people with disabilities), making them easily accessible to people with wheelchairs and strollers, and allowing residents and visitors with disabilities to enjoy the forest environment.



One major factor that has contributed to the popularity of Seoul’s Dulle-gil trails is accessibility. The starting and ending points, as well as numerous points along the trails, are connected to subway stations, making it easier for people to get to and explore the trails with the hub based on Seoulo 7017 at Seoul Station. Moreover, there are 35 historic and cultural properties located along the trails, such as Buddhist temples, allowing citizens and visitors to experience the history, culture, and natural beauty of Seoul.

Good Practice Demonstration: The Seoul City walks programme demonstrates:

- the way a city’s tourism offering can be diversified to engage more of the local population in the tourism value chain while reducing the negative social and economic impacts of city tourism;
- how city residents and visitors can share in a city’s cultural and natural heritage; and
- the way persons with disabilities can be included in city tourism experiences through specially designed walkways, signage and information systems.

Seoul's Future Heritage Project

Rationale: The goal of Seoul's forward looking Future Heritage project is to identify tangible and intangible assets from the early modern and modern history of Korea that contain important stories of memorable people, incidents, or everyday life and to preserve them for future generations. This suite of cultural heritage attractions will complement its pre-modern and ancient cultural and historic heritage.

Main Features: Between 2013 and 2014, SMG identified over 1,600 Seoul Future Heritage candidates based on proposals from citizens and experts and selected 345 of them through expert deliberations and based on the agreement of the owners.

These include a wide variety of cultural heritage assets designated as Future Heritage sites such as:

- The House of Yun Geuk-yeong, composer of the famous Korean song "Milky Way in the Blue Sky";
- an old barbershop that many boys used to frequent with their fathers;
- a mill that used to smell of savory sesame oil and smoke early every morning;
- a tailor's shop that has been making clothes for over 100 years;
- industrial complexes that still preserve the joys and sorrows of laborers from the 1970s and 80s;
- a restaurant where a man first met his wife 40 years ago; and
- a traditional soju production facility.



House of Yun Geuk-yeong, a Seoul Future Heritage Pilot Project



More recently, the so-called "retro syndrome" swept across Korea such as Reply 1994, a Korean drama aired in 2013, that became highly popular and sparked nostalgia for Seoul's recent past. The drama is set in Sinchon, and Eagle Café, both of which are featured in many of the episodes. Eagle Café was a meeting place and hideout for college students in the Sinchon area from the 1970s to 90s. It is said that everyone who went to college in Sinchon around that time knew about Eagle Café that were designated as a Seoul Future Heritage in 2014. The SMG issues Seoul Future Heritage certificates to the owners and designates the sites with an identifying mark, thereby supporting their preservation and leading more citizens to recognize the value of preserving future heritage assets.

Good Practice Demonstration: The Seoul Future Heritage project is an excellent demonstration of a forward looking approach and methodology to diversifying a cities' cultural heritage offering, raising the attractive amenity of the city, and developing a fairer spread of the benefits of tourism to city communities. Of particular interest is the leveraging of Seoul City community knowledge to identify future heritage proposals, and obtain strong support for conservation and presentation to visitors.

Tourist Police in Insa-dong, Myeong-dong and Itaewon



Rationale: With substantial increases in the volume of international tourism to Seoul City, the need for increase security for tourists to prevent crime and exploitation, maintain order in main tourist destinations, and secure tourists in case of emergency led the SMG to establish the Seoul Tourist Police.

Main Features: By October 2013, a well-trained tourist police speaking English, Chinese, and Japanese was based in main destinations of Myeong-dong, Itaewon, Dongdaemun, Insa-dong, Hongdae area, Cheongyecheon (Stream), and places close to city Hall. Around 100-newly recruited tourist police officers went through a month-long course operated by the Korean Tourism Organization (KTO) on basic matters that a tourist guide should know, along with foreign language skills, and handling tourists at the destination level.

Their major duties include:

- crime prevention/maintenance of basic order;
- crackdown on illegal acts perpetrated against foreign tourists;
- providing tourist assistance and translation services; and
- handling foreign tourists' complaints.

This has reduced crimes against tourists and enabled tourists falling victim to profiteering or rejection of refund for goods purchased to get help from tourist police officers on the beat or at nearby tourist police centers.

Good Practice Demonstration: The SMG move to establish a foreign language capable tourism policy force demonstrates how the security of tourists can be increased while reducing concerns over security in the face of security concerns and potentially major threats.

“Travelling Towns in Seoul” Project

Rationale: As most of Seoul’s fast growing tourism is concentrated on the city center tourism precincts, the SMG policy has focused upon diversifying the tourism content, to develop unique local tourism products, and stimulate local entrepreneurship, income and employment opportunities across Seoul’s 17 districts. The “Travelling Towns in Seoul” project seeks to activate this community-based tourism policy.

Main Features: Since its inception five years ago, the city selected 30 projects from 2013 to 2017 and supported them with a fund of KRW 1.65 billion. Every year, project plans are submitted through competitions of the autonomous districts, and around five projects are selected by an evaluation committee of experts. A total of 17 project plans were proposed in 2017 the top seven of which are shown below.

2017 Selection of Traveling Towns in Seoul

No.	Autonomous district	Project name	Project themes
1	Gangbuk-gu	A healing tour of history and culture in our neighborhood	Modern and contemporary history
2	Gwanak-gu	Gwanak, walk the road of democracy	Modern and contemporary history
3	Dongjak-gu	Time travel along the Chunghyo-gil	History, culture, nature
4	Seongdong-gu	The regenerated city of Seongsu! A journey of stories	Industrial resources and social economy
5	Seongbuk-gu	A village trip in Bomun-dong and Anam-dong	History, culture, nature
6	Yangcheon-gu	Picnic Season 2 - A few guides to look into Yangcheon	Industrial resource
7	Jungnang-gu	<Alley trip> Sangbong atelier street: a secret door	Industrial resource

Seoul is not only exploring and utilizing the distinct tourism resources of the region, but it is also operating the "Fair Tourism Traveler Training Program" to develop distinctive and differentiated tourism resources as effective tourism products that empowers local residents as the main drivers in the provision of high-quality tourism attractions in various parts of Seoul providing tourists the opportunity to experience authentic Seoul life.

Good Practice Demonstration: The Travelling Towns in Seoul Project demonstrates effective approaches to:

- product diversification following strong market trends for authentic community-based tourism experiences based on inclusion of local communities in the tourism supply chain of the city;
- using participative planning and decision making processes to create tourism policy with local communities; and
- ensuring that the daily lives of the residents can coexist with responsible tourist activities emphasizing the importance of “respect” as local or international travelers to share different cultures and environments and to enhance the quality of life of the city lives.

7.2 Technology and new business models

Shared City Seoul' Project

Rationale: In order to bring about a more sustainable and livable city, in 2012, SMG adopted its a “Shared City Seoul” policy and project with the goal of improving the lives of citizens by incorporating ‘sharing’ into the daily lives of each of Seoul’s 10 million residents. The policy and related project seeks to create a shared economy ecosystem, and spread of the sharing culture.

Main Features: The ‘Shared City Seoul’ project involves the active cooperation of 25 district offices, education offices, and schools, and has resulted in the establishment of numerous sharing promotion ordinances and committees. In particular, the government has sought to make sharing programs more relevant to citizens’ lives by promoting:

- Public space sharing: 1,145 public places used approximately 230,000 times per year
- Public parking lot sharing: 1,260 lots, used around the clock
- Children’s clothing sharing (290,000 cases), tool libraries (130 libraries), toys (47 stores)
- Housing sharing: urban private rental rooms: 904 (general: 790 cases, Korean traditional houses: 114 cases)
- ‘Empathy between Different Generations Living Under the Same Roof’ (209 cases, connecting 267 college students with elderly citizens)
- Shared tourist accommodation (63,594 units in 2016) through Airbnb, Couch Surfing, Kozaza and BnBHero among others
- Seoul Bike “Ddareungi” bike sharing (~5,600 bikes in Central Seoul and key districts)
- Shared cars: 3,377 cars, 897,000 members, average of 4,200 users per day
- Public data sharing: 4,237 cases, statistics, big data including transportation, tourism, and administrative information

Based on observation provided by SMG tourism officials, the Seoul sharing economy is growing fast, doubling at least every two to three years in areas such as car sharing, bicycling, shared tourist accommodations. An annual ‘Sharing Festival’ organized by SMG provides an opportunity for citizens to experience Seoul’s sharing policies and shared economy as well as providing a forum for citizens to discuss the direction of ‘Sharing Seoul’ policy and projects.

Good Practice Demonstration: Seoul’s experience illustrated the value of having a proactive policy and project approach to effective adoption of the sharing economy for enhanced sustainability; participation of citizens and district and business stakeholders in policy formulation and implementation; and application of “big data” analytics to monitor and feedback on outcomes.

Seoul e-Government Policy

Rationale: To achieve a better more efficient public service delivery, as well as improve communication channels for citizen engagement and empowerment, the city has developed a mobile centered e-Government policy and related infrastructure. That covers 32 municipal government service organizations and has positioned the city as a world leader in the field.

Main Features: SMG interconnected 614 types of information systems that control and provide integrated public services, including urban planning, culture, tourism, transportation, and housing among others, and enable the employment of Big Data analytics. The policy also provides infrastructure to allow citizens to connect with their government officials including the Mayor through a citizen's consul located in the Mayor's office, and to vote on specific city policy proposals. The Seoul e-Government infrastructure is also linked to the implementation of its "Shared City Seoul" policy and project. The SMG plans to increase coverage to a total of 39 public organizations, including the full range of administrative services such as welfare, health, safety, transportation, and environment.



Good Practice Demonstration: Seoul's e-Government policy demonstrates the importance of having a proactive e-Government policy to guide the development and integration of a robust city e-Government infrastructure. It also demonstrates how a mobile-based e-Government system can provide direct access to decision makers for feedback on issues and policy decisions, and interlinking of data systems to provide "big data" capabilities for more efficient and effective delivery of public services.

Seoul Tourism IT Startup Projects

Rationale: To ensure that Seoul stays up to date with the rapid changes in the way tourist Offline to Online and On-demand services such as travel booking and reservations, accommodations, transportation, tourist information, translation, and other services involving mobile technology are growing, SMG in 2016 initiated its Seoul Tourism Startup a policy.

Main Features: The policy involves providing seed finance and research to support promising IT tourism startups. Prospects are identified through an annual Startup Contest. Over 100 startups applied to the contest in 2016 of which 12 services were awarded for the Contest in 2016, while over 60 startups applied to the Seoul Tourism Startup contest in 2017 from which 8 services were awarded. The awardees receive financial and marketing incubation support from the city government to develop their service concept with most of the existing startup projects expected to be completed by the end of 2017.



Examples of successes of the project include: (a) “tndn” which is a mobile application that makes it possible for a non-Korean speaking visitor to order food at a restaurant like a local, make payments for services and obtain information and services on restaurants, attractions, and public and shared transportation services; (b) “BUXI” that is an airport taxi sharing application that provides safe, convenient and cost effective transfers between the airport and the city; and (c) SAFEX that takes care of transferring visitors luggage to their place of accommodation removing the hassle of carting this on public transportation, manage time more effectively and enjoy a more comfortable the transfer from and to the airport.

Best Practice Demonstration: The SMG’s policy initiative and startup project demonstrates how a city can move to ensure that it stays ahead of trends in mobile applications for tourism services thus providing improved tourist services, visitor satisfaction, competitiveness and sustainability as a destination. It also demonstrates how cities can act as startup incubators including the approach of annual startup contests to identify potential winners, and support their development.

Annex

Seoul itinerary and interview schedule

Date	Time	Location
7/5 (Wed)	9:30~10:30	<p style="text-align: center;">Interview</p> <p>1) Joon Ho, Ahn · General-Director of Tourism & Sports · Seoul Metropolitan Government</p> <p>2) Sungho Cho · Deputy Director, Tourism Policy Division · Seoul Metropolitan Government</p>
	10:30~12:00	<p style="text-align: center;">Focus Discussion (Technology and new business model)</p> <p>3) Jihyun Kim · External Relations Officer of the Information Planning Division · Seoul Metropolitan Government</p> <p>4) Daniel Ahn · Tourism Business Team · Seoul Tourism Organization</p> <p>5) SIMON LEE · CEO, Flitto</p>
	12:00~14:00	Lunch
	14:00~15:30	Site visit to TOPIS (Transport Operation and Information Service)
	15:30~16:30	<p style="text-align: center;">Focus Discussion (Social and cultural characteristics)</p> <p>6) Park Jinhwa, Manager, Tourism Policy Division, Seoul Metropolitan Government</p> <p>7) Hyunghee Kim, Manager Tourism Policy Division, Seoul Metropolitan Government</p> <p>8) Soo-Jin Park, Operational Manager Seongbuk Cultural Center</p> <p>9) Han, Beom Soo, Professor, kyonggi University</p>
	16:50~18:00	<p style="text-align: center;">Interview</p> <p>10) Suh, Byung-Gon, Executive Director, Seoul Tourism Organization</p> <p>11) Zhu, Sangyong, Director for International Cooperation, Korea Tourism Organization</p>
	18:00~19:00	Site visit to Seoulo 7017

Date	Time	Location
7/6 (Thurs)	9:30~11:30	Pedicab Tour of Bukchon Hanok Village https://arteeridersclub.com/
	12:00~13:00	Lunch
	13:30~15:00	Samhae Soju Brewery (Korean Brewery Tour) https://www.onemoretrip.net https://www.onemoretrip.net/goods/view?no=351
	15:30~16:30	Site visit to DDP (Dongdaemun Design Plaza) 12) Yeeyn Leena Lee , Project Coordinator, International Relations Team, Seoul Design Foundation 13) Hyowon Lee , Project Coordinator, International Relations Team, Seoul Design Foundation

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