

〈研究論文〉

# A Study on the Status of Korea's Integrated Resorts (IR) and Educational Curricula on Tourism

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## I. Introduction

Recently, the integrated resorts (IR) as a platform for various entertainment and leisure facilities such as hotels, shopping centers, gaming facilities, and convention centers has been gaining traction (Kim, 2022). In particular, for Korea, where there is limited availability of natural landscape for tourism, the development of IR has become a key means to enhance the competitiveness of the domestic tourism industry, especially for job creation and regional economic revitalization. There are a total of 18 casinos operating in Korea, 17 of which are open only for foreigners, with only Kangwon Land accessible to domestic tourists.

As such, while foreign tourists are the main target of the Korean casino industry, due to the restrictions of international travel from the impact of the COVID-19 pandemic, the number of visits to IR casinos had significantly decreased (Pyeon, 2020). As of August 2020, the number of Chinese VIP visitors to Paradise Casino had decreased by 92.3% compared to 2019, and Japanese VIP visitors had dropped by 99.8% in the same period (Pyeon, 2020).

In addition, with exception to government-owned enterprises such as Kangwon Land and Grand Korea Leisure (GKL), the remaining 17 foreigner-exclusive casino businesses drastically reduced their workforce and underwent restructuring, resulting in a decrease in total employment in relevant sectors (Ministry of Culture, Sports and Tourism, 2023). As a result, the number of employees in the domestic casino industry decreased by 15.9%—from 7,925 in April 2020 to 6,688 in April 2022 (Ministry of Culture, Sports, and Tourism, 2022). When the Chinese group tours resumed after the pandemic, the industry enjoyed a revival in the number of visitors to the foreigner-exclusive casinos, but also faced significant shortage of labor (Kim, 2023a). Moreover, with the approval from the Ministry of Culture, Sports and Tourism on the establishment of the large-scale Inspire Entertainment Resort near the Incheon International Airport in early 2024, the industry is experiencing a severe lack of experienced labor force.

As of January 2021, there were approximately 10,000 graduates annually from 115 universities with tourism courses that entered the tourism job

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market, and it was widely recognized within the tourism industry that absorbing 35% of the graduates per annum is near impossible (JIBS News, 2023, November 25). However, due to the sudden influx of tourists and the constant decrease in number of graduates from tourism-related majors, the new demand for works from the IR has surpassed the supply, leading to a vicious cycle of declining customer service quality, reduction of tourists due to poor reviews, and delays in development of new tourism products and services, further putting pressure on the industry (Jegal, 2023; Tourism & Leisure Industrial Skills Council, 2024).

As such, investment in human resources is essential to increase the supply of talent for the tourism industry in response to the rapidly changing domestic and international market. This study aims to examine the current status of the IR industry including casinos in Korea, and its related educational curricula, in order to proactively mitigate the talent shortage projected in Japan's IR industry, as

the Osaka Integrated Resort is expected to open by 2030.

## II. Status and Analysis of IR in Korea

### 1. Mapping Casinos in Korea

Table 1 presents the status of casinos in Korea. Out of a total of 18 operating casinos there are 17 foreigner-exclusive casinos and 1 domestic-accessible casino (Kangwon Land Casino). The total number of employees across the 18 casinos amounts to 8,760 (6,683 at the 17 foreigner-exclusive casinos and 2,077 at the 1 domestic-accessible casino). In 2023, the total number of casino visitors was 4,480,166, and the total licensed area for casino activities was 69,588.49 m<sup>2</sup>. Additionally, Table 2 shows the number of casino visitors compared to the number of foreign tourists by year (Ministry of Culture, Sports, and Tourism, 2024.)

Table 1. Casinos in Korea

(As of April, 2024)

Location	Name of Casino [Name of Corporation]	Founding date	Operation Type (Rating)	Number of Employees	Visitors in 2023	Licensed area (m <sup>2</sup> )
Seoul	Paradise Casino Walkerhill [Paradise Group]	1968, Mar. 5	Lease (5 Star)	968	423,304	2,694.23
	Seven Luck Casino Gangnam Coex [Grand Korea Leisure Co., Ltd.]	2005, Jan. 28	Lease (Convention hotel)	893	262,789	2,158.32
	Seven Luck Casino Dragon City [Grand Korea Leisure Co., Ltd.]	2005, Jan. 28	Lease (5 Star)	525	397,984	2,137.20
Busan	Seven Luck Casino, Busan Lotte [Grand Korea Leisure Co., Ltd.]	2005, Jan. 28	Lease (5 Star)	337	129,052	1,583.73
	Casino Paradise Busan [Paradise Group]	1978, Oct. 29	Lease (5 Star)	265	78,186	1,483.66

Incheon	Paradise City [Paradise Segasammy Co., Ltd.]	1967, Aug. 10	Direct Management (5 Star)	852	298,076	8,726.80
	Inspire Casino [Inspire Integrated Resort Inc.]	2024, Jan. 23	Direct Management (5 Star)	1,063	-	14,372.00
Gangwon	Alpensia Casino [Jibas Inc.]	1980, Dec. 9	Lease (5 Star)	5	73	632.69
Daegu	Hotel Inter Burgo Daegu [Golden Crown Leisure Co., Ltd.]	1979, Apr. 11	Lease (5 Star)	154	70,376	1,485.24
Jeju	Gongzi Casino [Gil Sang Chang Hui LLC]	1975, Oct. 15	Lease (5 Star)	65	4,129	1,604.84
	Paradise Casino Jeju Grand [Paradise Group]	1990, Sep. 1	Lease (5 Star)	187	47,327	1,159.92
	Seven Star Casino [Cheonghae Inc.]	1991, Jul. 31	Lease (5 Star)	170	17,926	1,175.85
	Jeju Oriental Hotel Casino [Geonha Inc.]	1990, Nov. 6	Lease (5 Star)	50	5,885	865.25
	Jeju Dream Tower Casino [Lotte Entertainment Co.]	1985, Apr. 11	Lease (5 Star)	742	266,864	5,529.63
	Jeju Sun Casino [Gnl Inc.]	1990, Sep. 1	Direct Management (5 Star)	63	6,237	1,509.12
	Landing Casino (Jeju Shinhwa World) [Landing Entertainment Korea Co.,Ltd.]	1990, Sep. 1	Lease (5 Star)	311	58,169	5,641.10
	Mega Luck Casino [Mega Luck Inc.]	1995, Dec. 28	Lease (5 Star)	33	707	1,347.72
13 Corporations and 17 Casinos (foreigner- exclusive)			Direct Management 3 Lease:14	6,683	2,067,084	54,107.30
Gangwon	Kangwon Land Casino (High1 Resort) [Kangwon Land, Inc.]	'00.10.12	Direct Management (5 Star)	2,077	2,413,082	15,481.19
14 Corporations and 18 Casinos (for both foreign and domestic visitors)			Direct Management:4 Lease:14	8,760	4,480,166	69,588.49

※ Sales: Based on sales subject to tourism fund levy

※ Number of employees (as of 2024, April): Based on total number of employees including contract based positions and permanent employees

※ The number of employees for Paradise Casino Walkerhill includes head office personnel, and Seven Luck Casino Gangnam COEX branch includes head office and marketing personnel.

※ The number of employees for Paradise City, Inspire Casino, Dream Tower Casino, and Landing Casino is based on casino personnel among resort complexes.

※ The number of employees for Kangwon Land Casino is based on casino personnel among resort complexes, including sales department.

Source: Edited from Ministry of Culture, Sports and Tourism of Republic of Korea (2024)

Table 2 Annual Comparison of Foreign Tourists and Casino Visitors

(Unit: person, %)

Year	Foreign tourists (A)	Casino visitors (B)	Percentage of foreign tourists visiting casinos (B/A)	Year-on-year increase/decrease rate of casino visitors (%)
2010	8,797,658	1,945,819	22.1	16.0
2011	9,794,796	2,100,698	21.4	8.0
2012	11,140,028	2,384,214	21.4	13.5
2013	12,175,550	2,707,315	22.2	13.6
2014	14,201,516	2,961,833	20.9	9.4
2015	13,231,651	2,613,620	19.8	-11.8
2016	17,241,823	2,362,544	13.7	-9.6
2017	13,335,758	2,216,459	16.6	-6.2
2018	15,346,879	2,839,017	18.5	28.1
2019	17,502,756	3,233,761	18.5	13.9
2020	2,519,118	1,160,967	46.1	-64.1
2021	967,003	708,571	73.3	-39.0
2022	3,198,017	1,105,293	34.6	56.0
2023	11,031,665	2,067,084	18.7	87.0

※ Casino users are based on foreigner-exclusive casinos in both mainland and Jeju Island.

Source: Edited from Ministry of Culture, Sports and Tourism of Republic of Korea (2024)

## 2. Status and Analysis of IR

### (1) Kangwon Land IR Casino Business

Kangwon Land is the only casino in Korea where domestic tourists are allowed to enter. It was established in June 1998 under the Special Act on the Assistance to the Development of Abandoned Mine Areas and opened as a small casino on October 12, 2000. As of April 2024, it has the largest number of employees among the 18 operating casinos, totaling

2,077 employees. Its licensed area is 15,481.19 m<sup>2</sup>, making it the largest of the 18 casinos as well (Ministry of Culture, Sports and Tourism, 2024). According to the Special Act, for the sake of public interest and efficiency, Korean government subsidiaries own 51.0% of Kangwon Land, while foreign investors hold 14.5%, and 5.2% is held in company shares (Kangwon Land, 2024). As of December 2023, the Korea Mine Reclamation Corporation held 36.3% of the total shares, and the National Pension Service

held 4.9% (Kangwon Land, 2024).

## (2) Grand Korea Leisure (GKL)

Grand Korea Leisure (GKL), a subsidiary of the Korea Tourism Organization, was established in 2005. It operates three foreigner-exclusive casino branches under the brand "Seven Luck Casino" at Gangnam COEX, Seoul Dragon City, and Busan Lotte, which all opened on January 28, 2005 (Ministry of Culture, Sports and Tourism, 2024). The Korea Tourism Organization holds 51.0% of the shares, and the National Pension Service holds 8.75% (Grand Korea Leisure, 2021). Under the Act on the Operation of Public Institutions, GKL is classified as a quasi-market-based public corporation, operating with the goal of supporting the growth of the tourism industry, realizing social value, and contributing to the national economy.

## (3) Paradise Group

Paradise Group, a leader in the domestic foreigner-exclusive casino industry, began operations in 1967 with the opening of Incheon Olympus Hotel Casino (currently renamed as Paradise City)—the country's first foreigner-exclusive casino. It now operates at three more locations in Seoul, Busan, and Jeju Island, and the Incheon Paradise City Casino has been expanded into an IR (Kim, 2024). As of December 2023, Paradise Global Inc. holds 37.9% of the shares, and the Kaywon Academy holds 4.1% (Kim, 2024). By April 2023, Paradise Walkerhill Casino employed the largest number of staff, with 968 employees (Ministry of Culture, Sports and Tourism, 2024).

## (4) Inspire Casino Integrated Resort

Inspire Casino was established by Inspire Integrated Resort Inc. on January 23, 2024. With an area of 14,372.00 m<sup>2</sup>, it is currently under Representative Chen Xi, and the number of casino employees reached 1,063, making it the second-largest casino in Korea after Kangwon Land (Ministry of Culture, Sports and Tourism, 2024). In 2024, three hotels with a total of 1,275 rooms, an indoor water park "Splash Bay," an arena with a seating capacity of 15,000, digital entertainment street "Aurora Street," restaurants, and the foreigner-exclusive Inspire Casino began its operation.

## (5) IR in Other Countries

Looking at the economic impact of IR in other countries, the Marina Bay Sands and Resorts World Sentosa in Singapore started their operation in 2010, and as of 2013, these resorts comprised 1.5-2% of Singapore's GDP and created approximately 60,000 quality jobs (Lee, 2013). In Macau, the development of IR has resulted in nearly 28 million annual tourists visiting the city state and the industry demonstrated high employment levels (Lee, 2013).

In addition, Japan's Osaka Integrated Resort is scheduled to open in 2030, which will comprise a casino accessible to both domestic and foreign visitors, three luxury hotels with a total of 2,500 rooms, a convention center size of 100,000 m<sup>2</sup>, a multi-purpose theater with 35,000 seats, and various shopping and leisure facilities. The IR is expected to create around 200,000 jobs and generate an economic impact of approximately 1 trillion Yen (approximately 6.6 billion USD) annually in Osaka and its surrounding areas. Moreover, Osaka is expected to attract 20 million visitors annually, including 6 million foreign tourists, generating about 100 billion

Yen (approximately 667 million USD) in tax revenue (Seo, 2023).

#### (6) Future Trends in Korea

In the International Business Center (IBC-III) area of the Incheon International Airport, following the opening of the Inspire Entertainment Resort on January 23, 2024, U.S.-based company Mohegan Gaming & Entertainment (MGE) announced that it will build the largest IR in Northeast Asia, covering 4.3 million m<sup>2</sup>, in Yeongjong Island, by 2046 (Ha, 2023). Furthermore, Inspire Entertainment Resort officially announced plans to recruit a large workforce for its operations, including in entertainment, retail, casino, and hotel services sectors (Lee, 2022). Therefore, with the opening of the Inspire Entertainment Resort in Incheon, Yeongjong Island, and the approval of the Ministry of Culture, Sports and Tourism in 2024, the need for talent development and the recruitment of specialized personnel to operate the key infrastructure of IR is becoming urgent.

### III. Analysis of Tourism-relevant Curriculum

#### 1. Defining Curriculum

The term “curriculum”, also known as “course of study,” was originally used to refer to subjects, learning processes, and textbooks. However, its definition has expanded to vary depending on how educational content is systematized according to industry needs, measured by mindsets, and structured through experiential learning (Ahn, 2011). Dewey (1916) claimed that all curricula are fundamentally related to vocational skills. Furthermore, a

curriculum can be defined as a service delivered through a consumer-supplier relationship between the instructor and the student, including all activities with direct interaction between the two (Choi, 2014). A curriculum is also seen as a systematic plan to achieve educational goals by selecting and organizing learning material to answer the question on how students can acquire the knowledge. At the university level, schools are working to predict and respond to changes in the industrial ecosystem, focusing on practical skills development (Park, 2016).

Therefore, there needs to be education targeted to foster professionals needed in the tourism industry, for which systematic curricula design is essential to meet industry demand identified by experts by promoting practical skills through industry-university partnerships that will include internship opportunities (Choi, 2012; Kim, 2016).

#### 2. History of Trends in Research on Tourism-relevant Curricula

Tertiary education in tourism began with hotel management, and its roots can be traced back to the establishment of the *École Hôtelière de Lausanne* (EHL) Hospitality Business School in Switzerland in 1893, followed by the hospitality management program at Cornell University in the United States in 1922 (Hsu, Xiao & Chen, 2017). During the 1960s and 1970s, tourism education transitioned from technical and vocational schools to undergraduate and graduate programs (Ring, Dickinger & Wober, 2009), focusing on vocational skills with a foundation in management studies (Tribe, 2001). In the 1980s, debates surrounding tourism curricula intensified, and

since the field was considered to lack theoretical foundation to be classified as a complete academic discipline, it required adaptation of theories from relevant fields and multidisciplinary, interdisciplinary, and transdisciplinary approaches to tourism research were proposed (Bodewes, 1981). The 1990s saw a shift toward student-centered curriculum development, with a focus on the hospitality industry and business management (Tribe, 2001). From the 2000s onward, the curricula matured and evolved into more balanced programs that integrated theory and practice, including broader discussions on teaching methods and the role of tourism education (Tribe, 2001). The first tourism-related education in Korea started in 1962 with the introduction of the Tourism Major at Gyeonggi Women's Junior College, followed by the establishment of a relevant department at Gyeonggi University in 1964 (Kim, 2016). Research on tourism curricula in Korea began in the late 1980s, initially focusing on curriculum development and improvements for undergraduate programs. From the 1990s, studies expanded to include the structure of

tourism geography courses and graduate-level curricula (Ko & Jeong, 2013). In the 2000s, research on tourism curricula became relatively detailed, exploring sub-divisions like hotel management, cruise management, and e-learning courses (Ko & Jeong, 2013). Since 2010, curriculum development research has been the most active, with research based on competencies such as the National Competency Standards (NSC) conducted according to specialized fields such as hotel, casino, and aviation, including diversifying learning formats such as internships, e-learning, study-abroad activities, employment, and entrepreneurship that provides sector-targeted approach (Jung, 2021).

Table 3 presents the educational institutions in Korea, offering courses relevant to hotel and casino industries, which are critical to human resources development for IR. It includes one graduate school, one university, and six community colleges, signaling a significant shortage of educational institutions capable of producing professional labor force for these services, with only one four-year university offering such programs.

Table 3. Education institutions related to hotels and casinos

Classification	Educational Institution	
	School	Program
Specialized Graduate School	Kyonggi University Graduate School of Tourism	Hotel, Casino, and Convention Management Major
University	Hanseu University	Hotel Casino Tourism Major
Community College	Jeju Tourism College	Casino Management Major
	Jeju Tourism College	Casino Integrated Resort Management Major
	Yeungnam University College	Division of Tourism
	Yeungnam University College	Casino & Surveillance Major

Community College	Kyung-In Women's University	Department of Hotel Tourism Management
	Kookje University	Hotel Casino Tourism Major
Academic Credit Bank System	KwangWoon University	Casino Dealer Course
	Kaywon University of Arts and Design	Paradise School of Hospitality, Casino Service Major
	Mayfield Hotel School	Hotel and Casino Course
	Seoul Hyundai Occupational Training College	Hotel and Casino Course
	Korea Hotel & Tourism Occupational Training College	Department of Hotel and Casino

Source: Edited from Jin, C. & Choi, E. (2024).

#### IV. Conclusion

This study analyzed the status of IR with casinos in Korea and relevant courses offered in Korean tertiary education institutions. By understanding the industrial and educational situation in Korea, which is geographically close to Japan and has a mature IR industry, the study contributes to suggesting a proactive approach in introducing adequate curriculum to nurture talent in hotel, casino, and tourism industries as a mitigation measure towards expected shortage of labor force for the new IR in Osaka, Japan that will be open by 2030.

The research confirmed the issue of severe labor shortage caused by the decrease in the labor pool due to COVID-19 and the large-scale recruitment from the opening of the Inspire Entertainment Resort in Incheon, in 2024. It was found that there is a significant lack of educational institutions and curricula capable of training specialized talents, with only one graduate school, one four-year university, and six community colleges offering programs in the hotel and casino fields.

Given the rapidly changing domestic and international environment of the IR industry, inadequate measures in nurturing professional manpower can lead to a decline in the growth of the tourism industry due to risky investment environment and job insecurity. Therefore, recognizing the prospective negative impact of labor shortage on international competitiveness of Japanese IR industry and the overall tourism industry of Japan, it can be concluded that enhancing the educational environment related to the IR industry is essential to proactively address future changes in the talent recruitment structure. Future research will be conducted to scope the hotel and casino tourism research trends in Japan and identify gaps in the existing curriculum to propose solutions to secure a reliable pool of professionals in the IR industry.

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