Market Information

SOUTH KOREA 2020
About This Guide

This market guide includes a snapshot of the economies in South Korea, along with information about travel from this region (booking channels, consumer trends, U.S. international inbound visitation data, and key travel motivators and indicators).

Cover photo: Jeju Do Seongsan Ilchulbong, Jeju Island
Who We Are

Our Mission

As the destination marketing organization for the United States, Brand USA’s mission is to increase incremental international visitation, spend, and market share to fuel the nation’s economy and enhance the image of the USA worldwide.

Established by the Travel Promotion Act of 2009 as the nation’s first public-private partnership to spearhead a globally coordinated marketing effort to promote the United States as a premier travel destination and to communicate U.S. visa and entry policies, Brand USA began operations in May 2011.

Building on Success

As one of the best levers for driving economic growth, international travel to the United States currently supports 1.8 million American jobs (directly and indirectly) and benefits virtually every sector of the U.S. economy. Since its founding, Brand USA has worked with more than 900 contributing organizations to invite the world to explore the exceptional, diverse, and virtually limitless travel experiences and destinations available in the United States of America.
Our Partnerships

Brand USA’s operations are supported by a combination of non-federal contributions from destinations, travel brands, and private-sector organizations plus matching funds collected by the U.S. government from international visitors who visit the United States under the Visa Waiver Program.

Learn More

For industry or partner information about Brand USA, please visit TheBrandUSA.com. For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA’s consumer website at VisitTheUSA.com.

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According to studies by Oxford Economics, over the past seven years, Brand USA’s marketing initiatives have helped welcome 7.5 million incremental visitors to the USA, benefiting the U.S. economy with nearly $55 billion in total economic impact, and supporting more than 50,000 incremental jobs each year.
A Message from Christopher L. Thompson

As the destination storytellers for the United States of America, Brand USA helps drive our nation’s economy, create jobs, and bring the people of the world closer together. This guide is designed to assist you in generating business from the South Korea outbound-travel sectors. And, while it includes data from our fiscal year 2019, it’s important to acknowledge the unprecedented impact of COVID-19 in 2020. The global pandemic has resulted in tremendous loss for many families and has had a devastating impact on the travel industry. All of this makes Brand USA’s work even more critical. We are uniquely positioned to help guide the industry out of this crisis.

South Korea ranks as the fourth largest overseas source market for inbound visitation to the United States, with 2.3 million people visiting in 2019, and ranks as sixth largest overseas market in spend at $9.6 billion. The five activities visitors from South Korea look for when visiting the United States are sightseeing, shopping, water sports, fine dining, and national parks and monuments. We saw an increased interest among travelers in water sports, which supports a growing trend toward experiences.

Our forward-thinking marketing approaches allow us to capture the attention of global audiences in new, more compelling ways which ensure the United States stays top-of-mind as an aspirational travel destination. Brand USA uses many voices to showcase the diverse people and places across the United States in a way that inspires and encourages wanderlust. In FY2019, Brand USA launched the United Stories campaign giving voices to real travel experiences from a variety of perspectives including locals, international visitors, category experts and the creative class. We continued to stream content through the GoUSA TV streaming and YouTube channels, which offer a variety of short, medium, and long-form content about a diversity of travel experiences.

As you consider resources, please know Brand USA has a dedicated travel-trade website which provides a more effective and efficient platform for industry professionals to navigate information about U.S. travel. In addition,
please don’t hesitate to reach out to our team about U.S. destinations, the opportunities we offer to enhance your marketing efforts, and the most effective ways to inspire travelers to book trips to the USA.

We look forward to working with you in the months ahead to generate business to the United States from South Korea.

Together, we are marketing the USA!

**Christopher L. Thompson**

President & CEO

Brand USA
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Geography

Area
99,720 km²

Largest Cities

Seoul (Capital):
9.963 million

Busan: 3.465 million

Photos: Busan (left); Gyeongbokgung Palace, Seoul City (right)
Source: CIA World Factbook 2020
Climate

The Republic of Korea lies in the temperate zone with four distinct seasons. Due to its geographical location, it shows complex climate characteristics that reveal both continental and oceanic features. In Seoul, the average January temperature range is -7°C to 1°C (19°F to 33°F), and the average July temperature range is 22°C to 29°C (71°F to 83°F).

Demographics

Population

<table>
<thead>
<tr>
<th></th>
<th>South Korea</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population Size</td>
<td>51,835,110</td>
<td>332,639,102</td>
</tr>
<tr>
<td>Median Age</td>
<td>43.2 years</td>
<td>38.5 years</td>
</tr>
<tr>
<td>Population Growth Rate (2020 est.)</td>
<td>0.39%</td>
<td>0.72%</td>
</tr>
</tbody>
</table>

Population by Age

Source: CIA World Factbook 2020
Economy

- **GDP**: $1.642 trillion (2019 est.)
- **GDP Real Growth Rate**: 2.0% (2019 est.)
- **GDP—Per Capita**: $31,754 (2019 est.)
- **Unemployment Rate**: 4.1% (2020 est.)
- **Inflation Rate**: 1.1% (2020 est.)

Vacation Allocation

South Korea has 12 legal public holidays in a year. Most businesses are closed, and people are on vacation during the holidays.

Public Holidays 2020

- **New Year’s Day**: January 1
- **Lunar New Year**: January 1 of the lunar calendar
- **Independence Movement Day**: March 1
- **Buddha's Birthday**: April 8 of the lunar calendar
- **General Election**: April 15 (2020 only)
- **Children’s Day**: May 5
- **Memorial Day**: June 6
- **National Liberation Day**: August 15
- **Korean Thanksgiving Day**: August 15 of the lunar calendar
- **National Foundation Day**: October 3
- **Hangul Proclamation Day**: October 9
- **Christmas Day**: December 25

Source: CIA World Factbook 2019 and 2020; Bank of Korea 2020
Primary Travel Periods

• Traditionally, the peak season for Korean outbound travel is the summer holiday period, which runs from July to August. Also considered a peak season is December to February, the winter break coinciding with school holidays. However, the gaps between peak and shoulder seasons are getting smaller, and more Koreans are traveling year-round.

• Lunar New Year and Chuseok holidays are often considered high seasons, as many Koreans use these holidays to travel overseas. Both of these national holidays usually last for three days.

• In 2019, the highest number of Koreans traveled to the USA in July (222,906), followed by December (222,233), and January (211,479).
Travel Trends

International Travel Trends

Spending Trends: Exports (millions of U.S. dollars)

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Travel &amp; Tourism Exports</td>
<td>$7,108</td>
<td>$7,396</td>
<td>$8,357</td>
<td>$8,917</td>
<td>$10,019</td>
<td>$9,523</td>
<td>$9,599</td>
</tr>
<tr>
<td>Travel Receipts</td>
<td>$6,966</td>
<td>$7,237</td>
<td>$8,202</td>
<td>$8,783</td>
<td>$9,871</td>
<td>$9,388</td>
<td>$9,466</td>
</tr>
<tr>
<td>Passenger Fare Receipts</td>
<td>$142</td>
<td>$159</td>
<td>$155</td>
<td>$134</td>
<td>$148</td>
<td>$135</td>
<td>$133</td>
</tr>
<tr>
<td>Change (%) in Total Exports</td>
<td>18</td>
<td>4</td>
<td>13</td>
<td>7</td>
<td>12</td>
<td>-5</td>
<td>11</td>
</tr>
</tbody>
</table>

Visitation Trends: Arrivals

Photos: Hanok Village, Seoul (left), Statue of Sejong the Great, Gwanghwamun Plaza (right)
Source: U.S. Department of Commerce, National Travel and Tourism Office
Inbound Travel Trends

Visitor Spending

![Bar chart showing visitor spending in billions of U.S. Dollars](chart)

- Germany: 8.3
- Australia: 8.3
- South Korea: 9.6
- Brazil: 11.3
- Japan: 16.0
- United Kingdom: 16.3
- India: 16.5
- Mexico: 20.2
- Canada: 22.6
- China: 33.5

Billions of U.S. Dollars

International Arrivals to the USA

Top 10 Countries Generating Travel to the United States (Long-haul arrivals)

- India: 1.5
- France: 1.8
- Germany: 2.1
- Brazil: 2.1
- South Korea: 2.3
- China: 2.8
- Japan: 3.8
- United Kingdom: 4.8
- Mexico: 18.1
- Canada: 20.7

Millions of Visitors

Source: U.S. Department of Commerce, National Travel and Tourism Office
Traveler Characteristics

Main Purpose of Trip

<table>
<thead>
<tr>
<th>Main Purpose of Trip</th>
<th>2018 (%)</th>
<th>2019 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation/Holiday</td>
<td>73.3</td>
<td>70.2</td>
</tr>
<tr>
<td>Visit Friends/Relatives</td>
<td>11.7</td>
<td>12.9</td>
</tr>
<tr>
<td>Convention/Conference/Trade Show</td>
<td>3.9</td>
<td>6.0</td>
</tr>
<tr>
<td>Education</td>
<td>3.1</td>
<td>5.8</td>
</tr>
<tr>
<td>Business</td>
<td>6.8</td>
<td>4.9</td>
</tr>
<tr>
<td>Religion/Pilgrimages</td>
<td>0.4</td>
<td>0.2</td>
</tr>
<tr>
<td>Health Treatment</td>
<td>0.3</td>
<td>0.0</td>
</tr>
<tr>
<td>Other</td>
<td>0.5</td>
<td>0.0</td>
</tr>
</tbody>
</table>

All Purposes of Trip

<table>
<thead>
<tr>
<th>All Purposes of Trip</th>
<th>2018 (%)</th>
<th>2019 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation/Holiday</td>
<td>79.8</td>
<td>77.5</td>
</tr>
<tr>
<td>Visit Friends/Relatives</td>
<td>17.6</td>
<td>16.9</td>
</tr>
<tr>
<td>Convention/Conference/Trade Show</td>
<td>5.3</td>
<td>8.3</td>
</tr>
<tr>
<td>Education</td>
<td>5.4</td>
<td>7.2</td>
</tr>
<tr>
<td>Business</td>
<td>7.5</td>
<td>5.8</td>
</tr>
<tr>
<td>Religion/Pilgrimages</td>
<td>0.5</td>
<td>0.3</td>
</tr>
<tr>
<td>Health Treatment</td>
<td>0.4</td>
<td>0.1</td>
</tr>
<tr>
<td>Other</td>
<td>0.6</td>
<td>0.0</td>
</tr>
</tbody>
</table>

NET PURPOSES OF TRIP

<table>
<thead>
<tr>
<th>NET PURPOSES OF TRIP</th>
<th>2018 (%)</th>
<th>2019 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure &amp; Visit Friends and Relatives</td>
<td>88.4</td>
<td>86.7</td>
</tr>
<tr>
<td>Business &amp; Convention</td>
<td>12.1</td>
<td>13.2</td>
</tr>
</tbody>
</table>

Source: U.S. Department of Commerce, National Travel and Tourism Office
Select Traveler Characteristics

<table>
<thead>
<tr>
<th>Traveler Characteristics</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Length of Stay in USA (Mean Nights)</td>
<td>14.8</td>
<td>11.5</td>
</tr>
<tr>
<td>Length of Stay in USA (Median Nights)</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>First International Trip to the USA</td>
<td>47%</td>
<td>38%</td>
</tr>
</tbody>
</table>

USA Destinations Visited (States, Cities, and Regions)

<table>
<thead>
<tr>
<th>U.S. Destinations/Regions</th>
<th>2018 (%)</th>
<th>2019 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REGIONS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pacific Islands</td>
<td>49.69</td>
<td>54.92</td>
</tr>
<tr>
<td>Pacific</td>
<td>26.43</td>
<td>23.34</td>
</tr>
<tr>
<td>Middle Atlantic</td>
<td>17.35</td>
<td>13.94</td>
</tr>
<tr>
<td>Mountain</td>
<td>12.53</td>
<td>N/A</td>
</tr>
<tr>
<td>South Atlantic</td>
<td>7.02</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>STATES/TERRITORIES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Guam</td>
<td>37.35</td>
<td>41.54</td>
</tr>
<tr>
<td>California</td>
<td>24.33</td>
<td>21.09</td>
</tr>
<tr>
<td>New York</td>
<td>16.22</td>
<td>11.31</td>
</tr>
<tr>
<td>Hawaii</td>
<td>12.33</td>
<td>13.20</td>
</tr>
<tr>
<td>Nevada</td>
<td>11.75</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>CITIES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New York City</td>
<td>15.12</td>
<td>10.95</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>18.76</td>
<td>N/A</td>
</tr>
<tr>
<td>Honolulu &amp; Oahu</td>
<td>9.96</td>
<td>11.08</td>
</tr>
<tr>
<td>Las Vegas</td>
<td>11.42</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Source: U.S. Department of Commerce, National Travel and Tourism Office
Transportation Used in the USA

- **45%**: Auto, rented
- **23%**: Taxicab/limousine
- **21%**: Bus between cities
- **18%**: Auto, private or company
- **17%**: City subway/tram/bus
- **16%**: Air travel between U.S. cities

Activity Participation While in the USA

- **85%**: Sightseeing
- **73%**: Shopping
- **21%**: Watersports
- **20%**: Experience fine dining
- **17%**: National parks/monuments
- **15%**: Art gallery/museum
- **14%**: Amusement/theme parks
- **12%**: Historic locations
- **11%**: Concert/play/musical
- **9%**: Cultural/ethnic heritage sites

Source: U.S. Department of Commerce, National Travel and Tourism Office
Non-Stop Flights from South Korea to the USA

<table>
<thead>
<tr>
<th>Airline</th>
<th>Route</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Busan (LCC)</td>
<td>Guam</td>
<td>7 (daily)</td>
</tr>
<tr>
<td>Air Seoul (LCC)</td>
<td>Guam</td>
<td>7 (daily)</td>
</tr>
<tr>
<td>American Airlines</td>
<td>Dallas</td>
<td>7 (daily)</td>
</tr>
<tr>
<td>Asiana Airlines</td>
<td>Honolulu</td>
<td>7 (daily)</td>
</tr>
<tr>
<td>Asiana Airlines</td>
<td>Los Angeles</td>
<td>14 (2 daily)</td>
</tr>
<tr>
<td>Asiana Airlines</td>
<td>New York</td>
<td>14 (2 daily)</td>
</tr>
<tr>
<td>Asiana Airlines</td>
<td>Saipan</td>
<td>8</td>
</tr>
<tr>
<td>Asiana Airlines</td>
<td>San Francisco</td>
<td>7 (daily)</td>
</tr>
<tr>
<td>Asiana Airlines</td>
<td>Seattle</td>
<td>7 (daily)</td>
</tr>
<tr>
<td>Delta Airlines</td>
<td>Atlanta</td>
<td>7 (daily)</td>
</tr>
<tr>
<td>Delta Airlines</td>
<td>Detroit</td>
<td>7 (daily)</td>
</tr>
<tr>
<td>Delta Airlines</td>
<td>Minneapolis</td>
<td>7 (daily)</td>
</tr>
<tr>
<td>Delta Airlines</td>
<td>Seattle</td>
<td>7 (daily)</td>
</tr>
<tr>
<td>Hawaiian Airlines</td>
<td>Honolulu</td>
<td>5</td>
</tr>
<tr>
<td>Jeju Air (LCC)</td>
<td>Guam</td>
<td>41</td>
</tr>
<tr>
<td>Jeju Air (LCC)</td>
<td>Saipan</td>
<td>21 (3 daily)</td>
</tr>
<tr>
<td>Jin Air (LCC)</td>
<td>Guam</td>
<td>27</td>
</tr>
<tr>
<td>Korean Air</td>
<td>Atlanta</td>
<td>7 (daily)</td>
</tr>
<tr>
<td>Korean Air</td>
<td>Boston</td>
<td>35 (5 daily)</td>
</tr>
<tr>
<td>Korean Air</td>
<td>Chicago</td>
<td>7 (daily)</td>
</tr>
<tr>
<td>Korean Air</td>
<td>Dallas</td>
<td>4</td>
</tr>
</tbody>
</table>

Photos: Bukchon Hanok Village (left); Central Park at Songdo, Incheon (right)
Source: Brand USA Proprietary Research
## Airline Route Frequency

<table>
<thead>
<tr>
<th>Airline</th>
<th>Route</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Korean Air</td>
<td>Guam</td>
<td>20</td>
</tr>
<tr>
<td>Korean Air</td>
<td>Honolulu</td>
<td>11</td>
</tr>
<tr>
<td>Korean Air</td>
<td>Las Vegas</td>
<td>5</td>
</tr>
<tr>
<td>Korean Air</td>
<td>Los Angeles</td>
<td>14 (2 daily)</td>
</tr>
<tr>
<td>Korean Air</td>
<td>New York</td>
<td>14 (2 daily)</td>
</tr>
<tr>
<td>Korean Air</td>
<td>San Francisco</td>
<td>14 (2 daily)</td>
</tr>
<tr>
<td>Korean Air</td>
<td>Seattle</td>
<td>5</td>
</tr>
<tr>
<td>Korean Air</td>
<td>Washington, DC</td>
<td>7 (daily)</td>
</tr>
<tr>
<td>T’way Air (LCC)</td>
<td>Guam</td>
<td>21 (3 daily)</td>
</tr>
<tr>
<td>T’way Air (LCC)</td>
<td>Saipan</td>
<td>14 (2 daily)</td>
</tr>
<tr>
<td>United Airlines</td>
<td>San Francisco</td>
<td>7 (daily)</td>
</tr>
</tbody>
</table>

*Flight data is prior to COVID-19.*
Sales Distribution

- In 2020, the main keyword for travel in Korea is “experience.” A mature travel market with the number of domestic and overseas travelers increasing every year, the trend for this year is focused on “experience”—especially unfamiliar and hidden gem destinations. Seven out of 10 South Korean travelers (73.2 percent) revealed that they would look for a new travel destination as opposed to a destination to which they had previously traveled.

- In 2018, the most popular resources Korean travelers used to obtain travel-related information were portal sites (81.9 percent), followed by travel blogs (32.1 percent) and SNS (32.0 percent).

- The top 10 travel agencies accounted for approximately 60 percent of all air-ticket sales, according to the report by the Bank Settlement Plan (BSP). Hana Tour, Interpark Tour, Mode Tour, Yellow Balloon Tour, Online Tour, and Tide Square are among the leading producers.

- The average number of annual leaves used by Koreans has increased from 8.5 to 9.9 days since the implementation of the mandatory 52-hour work week regulation for companies in 2018. 65.8 percent of annual leaves were used for rest and

**Nearly 28.7 million Koreans, approximately 55 percent of the population, traveled overseas during 2019. This was a record-breaking number in the Korean outbound travel market history.**
travel. The proportion of annual leave used in the peak season (July to August) has decreased, suggesting that it was dispersed into a wider range of periods other than the summer vacation season.

- In 2018, Korean travelers who travel for three weeks to a month increased by 18 percent year-on-year. Over the past four years, long-term travel trends such as “living a month” and “living half a month” have continued. Koreans have changed, as more people prefer to experience local life by staying in the same place for a longer time rather than moving around cities and taking tours to various tourist spots.

- OTAs like Interpark Tour and Tide Square play a leading role in the South Korean online travel market. Roughly two-thirds of leisure travelers typically use an OTA when shopping for a flight or hotel, and just under half typically booking via an OTA.

Sources: Expedia 2020; Ministry of Culture, Sports, and Tourism; Skyscanner 2018
Online Channels

Digital Marketing/Social Media

The majority of the USA Campaigns are driven by digital marketing strategies to engage, inspire, and prompt international travelers to visit the United States. A variety of channels and methods are used, including:

- Proprietary website platforms
- Social media channels
- Global digital marketing and social campaigns
- Rich media
- Targeted advertising

Proprietary Consumer Website Platforms

Brand USA has two online consumer identities in the marketplace:

- VisitTheUSA (VisitTheUSA.com), which includes a global site in English plus in-language sites in most markets where Brand USA markets the United States to international travelers
- GoUSA, which is active in Asian markets, including China and Hong Kong (GoUSA.cn), Taiwan (GoUSA.tw), India (GoUSA.in), Japan (GoUSA.jp), and South Korea (GoUSA.or.kr)

Together, the VisitTheUSA and GoUSA website platforms are the consumer-facing online identities international travelers associate with travel to the United States.

Photos: Hwaseong Fortress, Seoul (left); Gamcheon Culture Village, Busan (right)
Social Media Channels

In addition to the global and in-market VisitTheUSA and GoUSA proprietary websites, Brand USA leverages related social media accounts in consumer-facing content and communications. Each market where Brand USA has a fully developed marketing presence has a dedicated, in-language website and social channels, which Brand USA uses to reach consumers in its target markets.

The following handles are used for global, consumer-facing promotions in English:

- **Website:** VisitTheUSA.com
- **Twitter:** @VisitTheUSA
- **Facebook:** Facebook.com/VisitTheUSA
- **YouTube:** YouTube.com/VisitTheUSA
- **Instagram:** VisitTheUSA

The following campaign hashtags support global and thematic promotions and initiatives:

- **Global:** #VisitTheUSA
- **Flavors/Culinary:** #TasteUSA
- **Road Trips:** #RoadTripUSA
- **Great Outdoors:** #OutdoorsUSA
- **Market the Welcome:** #USAWelcome

In addition to leveraging these global channels, Brand USA currently has localized social media efforts in the following markets via the channels shown in the Digital Channels chart on the following page.
## Digital Channels

<table>
<thead>
<tr>
<th>Market</th>
<th>URL</th>
<th>Local Tagline</th>
<th>Channels</th>
<th>Hashtag</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Australia</strong></td>
<td>VisitTheUSA.com.au</td>
<td>Plan Your USA Trip Now</td>
<td><img src="facebook.com/VisitTheUSAau" alt="VisitTheUSA" /> <img src="YouTube.com/VisitTheUSA" alt="Video" /></td>
<td>#VisitTheUSA</td>
</tr>
<tr>
<td>Brazil</td>
<td>VisitosUSA.com.br</td>
<td>Planeje Sua Viagem Aos USA Agora Mesmo</td>
<td><img src="facebook.com/VisitTheUSAos" alt="VisitTheUSA" /> <img src="YouTube.com/VisitTheUSAos" alt="Video" /></td>
<td>#VisitosUSA</td>
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<tr>
<td><strong>Canada</strong></td>
<td>VisitTheUSA.ca</td>
<td>Plan Your USA Trip Now</td>
<td><img src="facebook.com/VisitTheUSAca" alt="VisitTheUSA" /> <img src="YouTube.com/VisitTheUSA" alt="Video" /></td>
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<tr>
<td><strong>Canada</strong></td>
<td>VisitosUSA.ca</td>
<td>Planifiez Votre Voyage Aux USA Dès Maintenant</td>
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<td>Chile</td>
<td>VisitTheUSA.cl</td>
<td>Planifica tu viaje a USA ahora</td>
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<td>Préparez Votre Voyage Aux USA Dès Maintenant</td>
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<td>Germany</td>
<td>VisitTheUSA.de</td>
<td>Plant Jetzt Eure Reise In Die USA</td>
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<td><strong>Global</strong></td>
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<td>Plan Your USA Trip Now</td>
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<td>India</td>
<td>GoUSA.in</td>
<td>Plan Your USA Trip Now</td>
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<td>Japan</td>
<td>GoUSA.jp</td>
<td>今すぐ USAへの 旅の 計画を</td>
<td><img src="facebook.com/GoUSAd" alt="VisitTheUSA" /> <img src="YouTube.com/GoUSAjp" alt="Video" /></td>
<td>アメリカ旅行</td>
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<td>Mexico</td>
<td>VisitTheUSA.mx</td>
<td>Planifica Tu Viaje A USA Ahora</td>
<td><img src="facebook.com/VisitTheUSAes" alt="VisitTheUSA" /> <img src="YouTube.com/VisitTheUSAes" alt="Video" /></td>
<td>#VisitTheUSA</td>
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<tr>
<td><strong>Korea</strong></td>
<td>GoUSA.or.kr</td>
<td>지금 USA 여행을 계획해보세요</td>
<td><img src="facebook.com/GoUSAk" alt="VisitTheUSA" /> <img src="YouTube.com/GoUSAkr" alt="Video" /></td>
<td>#미국여행</td>
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<tr>
<td><strong>Sweden</strong></td>
<td>VisitTheUSA.se</td>
<td>Plan Your USA Trip Now</td>
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<td>#VisitTheUSA</td>
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</tr>
<tr>
<td>United Kingdom</td>
<td>VisitTheUSA.co.uk</td>
<td>Plan Your USA Trip Now</td>
<td><img src="facebook.com/VisitTheUSAuk" alt="VisitTheUSA" /> <img src="YouTube.com/VisitTheUSA" alt="Video" /></td>
<td>#VisitTheUSA</td>
</tr>
</tbody>
</table>
Brand USA Traveler Research

In the summer of 2013, Brand USA launched its Global Market Intelligence program. As part of this program, Brand USA commissioned PhoCus Wright, Inc. to conduct proprietary consumer research in various international markets. Respondents were recruited from an online panel. For markets beyond North America, the results reflect responses from adults who travel outside of their continent for leisure. The Global Market Intelligence program is designed to gain insight into travelers’ perceptions of the USA and its competitors, as well as general travel behaviors and preferences.

Top Five Motivations for Selecting Last Intercontinental Destination

Question: What motivates your desire to visit that destination? Select all that apply (N=990). Base: South Korea Intercontinental travelers.

- Cultural/historic attractions: 56%
- Beaches/seaside attractions: 52%
- Ecotourism and nature: 52%
- Urban attractions: 48%
- Dining/gastronomy: 46%

Top Five Strongest Impressions of the USA

For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply (N=999). Base: South Korea Intercontinental travelers.

- Open-minded: 54%
- Diverse: 51%
- Energetic: 49%
- Sophisticated: 27%
- Down-to-earth: 25%

Source: Brand USA Market Intelligence Study 2019
Top Five Channels Used in Destination Selection for Last Intercontinental Trip

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply. Base: South Korea Intercontinental travelers (N=990).

- 65% Websites via computer
- 47% Websites/applications via mobile phone
- 44% Personal recommendations from friends/family
- 28% Programs on TV/radio
- 26% Personal advice from travel professionals/travel agents

Expected Household Travel Spend for Next Intercontinental Trip

Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours. Base: South Korea Intercontinental travelers (N=990). Note: Totals may not add up to 100% due to rounding (Conversion KRW to USD=0.0009).

- Less than $2,499: 16%
- $2,500-$4,999: 42%
- $5,000-$7,499: 22%
- $7,500-$9,999: 11%
- $10,000+: 8%

Mean: $5,090  Median: $4,253

Source: Brand USA Market Intelligence Study 2019
Months Traveled (March 2017–March 2019)

Question: During what month(s) did you take your holiday(s)? Base: South Korea Intercontinental travelers (N=990).

<table>
<thead>
<tr>
<th>Month</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>19%</td>
</tr>
<tr>
<td>February</td>
<td>16%</td>
</tr>
<tr>
<td>March</td>
<td>18%</td>
</tr>
<tr>
<td>April</td>
<td>12%</td>
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<tr>
<td>May</td>
<td>22%</td>
</tr>
<tr>
<td>June</td>
<td>17%</td>
</tr>
<tr>
<td>July</td>
<td>22%</td>
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<tr>
<td>August</td>
<td>27%</td>
</tr>
<tr>
<td>September</td>
<td>19%</td>
</tr>
<tr>
<td>October</td>
<td>23%</td>
</tr>
<tr>
<td>November</td>
<td>15%</td>
</tr>
<tr>
<td>December</td>
<td>20%</td>
</tr>
</tbody>
</table>

Destination Interest—Top 10 States

Question: You indicated in a previous question that you have interest in visiting the USA some time in the future. Which U.S. state(s) are you interested in visiting? Base: South Korea Intercontinental travelers with interest in visiting the United States (N=967).

<table>
<thead>
<tr>
<th>State</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td>60%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>53%</td>
</tr>
<tr>
<td>California</td>
<td>52%</td>
</tr>
<tr>
<td>Washington</td>
<td>26%</td>
</tr>
<tr>
<td>Florida</td>
<td>23%</td>
</tr>
<tr>
<td>Alaska</td>
<td>17%</td>
</tr>
<tr>
<td>Texas</td>
<td>15%</td>
</tr>
<tr>
<td>Arizona</td>
<td>9%</td>
</tr>
<tr>
<td>New Jersey</td>
<td>8%</td>
</tr>
<tr>
<td>Virginia</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: Brand USA Market Intelligence Study 2019
Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: South Korea Intercontinental travelers (N=990). Note: Totals may not add up to 100% due to rounding.

- 23% One
- 37% Two
- 17% Three
- 18% Four
- 3% Five or more

Destination Decision for Next International Trip

Question: How far in advance of your departure date did/will you decide on the destination? Base: South Korea Intercontinental travelers (N=990). Note: Totals may not add up to 100% due to rounding.

- More than one year: 4%
- 6 to 12 months: 18%
- 3 to 5 months: 31%
- 1 to 2 months: 23%
- 3 to 4 weeks: 9%
- 1 to 2 weeks: 6%
- 2 to 6 days: 5%
- 1 day or less: 1%
- I did/will not decide in advance: 2%
Air Booking for Next International Trip

Question: How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box. Base: South Korea Intercontinental travelers (N=990). Note: Totals may not add up to 100% due to rounding.

Net Promoter

Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries? Base: South Korea Intercontinental travelers (N=990). Note: Totals may not add up to 100% due to rounding.

Source: Brand USA Market Intelligence Study 2019
Likelihood of Travel to the USA

Question: When, if ever, are you likely to visit the following countries? Base: South Korea Intercontinental travelers (N=990).

- In the next 6 months: 11%
- 6-12 months: 16%
- 1-2 years: 24%
- 2-5 years from now: 30%
- Maybe some time in the distant future: 17%
- Not likely to ever visit: 2%
Highlights of Success

Over the past seven years, Brand USA’s marketing efforts have generated...

- **7.5 million** incremental visitors
- **nearly $25 billion** incremental spending
- **$7.1 billion** federal, state & local taxes
- **nearly $55 billion** total economic impact
- **50,000+** incremental jobs supported each year

Highlights of Success

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Brand USA Markets

Brand USA deploys its marketing efforts in a strategic combination of emerging and established markets that have the potential to drive the greatest returns in terms of visitation, spend, and market share.

Based on these market selection factors, Brand USA currently focuses the majority of its consumer marketing efforts in the following markets:

- Australia
- Brazil
- Canada
- Chile
- China
- Colombia
- France
- Germany
- India
- Japan
- Mexico
- South Korea
- Sweden
- United Kingdom

These 14 international markets generate more than 80 percent of inbound travel to the United States. In total, through the combined total of Brand USA’s cooperative marketing platforms, contributed media, and trade outreach, the international marketing effort is present in more than 40 markets.
Visit USA Committee, South Korea

How Brand USA Works with Visit USA Committees

Brand USA works in collaboration with Visit USA committees around the world to promote the United States as a premier travel destination. These committees organize a wide range of promotional activity, including travel trade shows, workshops and training for travel agents and tour operators, roadshows with U.S. destinations, and more.

Visit USA committees are generally managed by voluntary members with an interest in promoting and selling travel to the United States. Brand USA collaborates with Visit USA committees and supports activities that align with Brand USA’s objectives and marketing strategies. In addition, Brand USA makes use of the in-market expertise of Visit USA committees, both where Brand USA has representation and where it does not.

Visit USA Committee South Korea

David Ruch
Chairman

Soojin Yu, Min Yoon, and Irene Lee
Vice Chairs

Photos: Hanbok traditional Korean garment, Seoul. (left); Haedong Yonggungsa Temple, Busan (right)
Source: CIA World Factbook 2018, unless noted otherwise
About the U.S. Department of Commerce

Brand USA works in close concert with the U.S. Department of Commerce through the National Travel and Tourism Office (NTTO) and the U.S. Commercial Service.

The National Travel and Tourism Office (NTTO)

NTTO is the liaison between Brand USA and the federal government. The office works with Brand USA on behalf of the Secretary of Commerce, who appoints the Brand USA Board of Directors and approves Brand USA’s annual objectives in consultation with the Secretary of State and the Secretary of Homeland Security. Additionally, NTTO facilitates the approval of matching funds for Brand USA and connects Brand USA to other federal agencies.

More broadly, NTTO creates a positive climate for growth in travel and tourism by reducing institutional barriers to tourism, administers joint marketing efforts, provides official travel and tourism statistics, and coordinates efforts across federal agencies through the Tourism Policy Council. The office works to enhance the international competitiveness of the U.S. travel and tourism industry and increase its exports, thereby creating U.S. employment and economic growth through:

- Management of the travel and tourism statistical system for assessing the economic contribution of the industry and providing the sole source for characteristic statistics on international travel to and from the United States;
- Design and administration of export expansion activities;
- Development and management of tourism policy, strategy and advocacy;
- Technical assistance for expanding this key export (international tourism) and assisting in domestic economic development.
Contact:
The NTTO is located in the International Trade Administration of the Department of Commerce.
14th & Constitution Avenue, NW
Washington, DC 20230
202.482.0140
ntto@trade.gov

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The U.S. Commercial Service

Brand USA works closely with the U.S. Commercial Service (USCS) to pursue our mutual objective of promoting the United States as the premier international travel destination.

The USCS is the trade promotion arm of the U.S. Department of Commerce’s International Trade Administration. The USCS is a federal government agency with a domestic network of over 100 offices and a global network operating in over 75 countries. The mission of the USCS is to assist American companies in their export needs and to support foreign direct investment into the United States. As America’s largest services export, travel and tourism is a key sector for the USCS.

The Commercial Service Global Travel and Tourism Team helps U.S. destinations and travel suppliers to attract international visitors and to grow international arrivals. This assistance can include: trade counseling, market research, vetting of potential partners, outreach to wholesale buyers, and support with international sales calls/trade shows/visits. To search for a domestic trade specialist near you, visit www.export.gov.

South Korea

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