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Brand USA

# Market Information 2018

## SOUTH KOREA





# About this Guide

Brand USA is pleased to present this guide in partnership with the U.S. Commercial Service and the National Travel and Tourism Office (NTTO). It includes snapshots of the economy 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).

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# About Brand USA

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.

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 in close partnership with more than 800 partner organizations to invite the world to explore the exceptional, diverse, and virtually limitless travel experiences and destinations available in the United States of America.

According to studies by Oxford Economics, over the past five years Brand USA's marketing initiatives have helped welcome 5.4 million incremental visitors to the USA, benefiting the U.S. economy with \$38.4 billion in total economic impact, and supporting more than 51,000 incremental jobs each year.

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.

For industry or partner information about Brand USA, please visit [TheBrandUSA.com](http://TheBrandUSA.com). For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA's consumer website at [VisitTheUSA.com](http://VisitTheUSA.com).

## Brand USA Headquarters

1725 Eye Street NW  
Eighth Floor  
Washington, DC 20006 USA

Phone: +1 202.536.2060  
Email: [info@TheBrandUSA.com](mailto:info@TheBrandUSA.com)

# A Message from Christopher L. Thompson

We, at Brand USA – the public-private partnership established seven years ago to promote international tourism to the United States – look forward to working with you to generate business from South Korea’s outbound-travel sector.



South Korea, in recent years, has been one of the highest-performing markets of origin for international travelers coming to the United States. Nearly 2 million travelers from South Korea visited the USA during 2016 – a jump of 12 percent over the preceding year. This increase allowed South Korea to move up as the seventh-largest source market for international arrivals in the United States.

The USA continues to be among the most popular long-haul destinations for South Koreans, a group of travelers who tend to be younger and quicker to make travel decisions, compared to other international travelers.

On the spending side, South Korean visitors spent \$8.6 billion during their 2016 U.S. trips. It was a 4-percent increase over 2015, and pushed South Korea up to the ninth position for spending among the top-10 groups of international visitors.

The number of South Koreans who travel overseas attained a peak level in 2016. Total volume was up about 16 percent over 2015, reaching approximately 22.4 million. Additionally, South Koreans are showing increased interest in FIT travel, as they move away from group-package tours.

Earlier this year, Brand USA launched two major outreach initiatives. One is our new giant-screen film, “America’s Musical Journey.” Since its release in February, the film has been a significant promotional element for introducing international travelers to the United States. The unique styles of American music evoke our cultural heritage and the stories associated with iconic locations across the U.S. landscape.

Another major, ongoing effort is Brand USA’s new travel-entertainment TV

channel, GoUSA TV, which also launched in February. Brand USA is the first destination-marketing organization to develop such an outlet. GoUSA TV is now available on Roku, Apple TV and Amazon Fire TV around the globe. In 2019, the channel will also be on Google Chromecast.

Now in its first stages of development, GoUSA TV features an assortment of travel experiences across four different categories: The Great Outdoors, Road Trips, Food and Drink, and Culture and Events. GoUSA TV will increase programming to include additional themes and formats, including series, films, videos and live videos. And, GoUSA TV will add Korean-language content in the near future.

The expanding development of GoUSA TV aligns well with the South Korean market, where the population is highly connected. South Korea is expected to have 10.2 million households with subscription video-on-demand by 2020. In the Asia-Pacific region, only Japan and China will have a higher number.

Brand USA, overall, has committed to a comprehensive “digital-screen strategy” that presents a storytelling approach regarding the diversity of travel possibilities in the United States. Using mediums that run the gamut from quick mobile content to giant-screen films, the storytelling continues to be relevant, engaging and authentic.

I invite you to talk to our team about trip experiences in the USA and opportunities to enhance your marketing efforts in South Korea. They can discuss with you the most effective ways to inspire international travelers in this market to book their USA trips now.

It is noteworthy that Brand USA South Korea has launched a fourth USA Specialist program to familiarize South Korean travel agents with the diverse range of travel experiences across the United States. In 2017, 49 agents completed the program. Just through the first several months of this year, 45 agents have enrolled. The agents participate in bi-monthly educational seminars and ultimately, a USA Specialist familiarization tour.

Together, we are marketing the USA!

**Chris Thompson**

President & CEO

Brand USA

# Brand USA

## Executive and Senior Leadership

### **Christopher L. Thompson**

President & CEO

CThompson@TheBrandUSA.com

### **Thomas Garzilli**

Chief Marketing Officer

TGarzilli@TheBrandUSA.com

### **Anne Madison**

Chief Strategy & Communications Officer

AMadison@TheBrandUSA.com

### **Donald F. Richardson**

Chief Financial Officer

DRichardson@TheBrandUSA.com

### **Karyn Gruenberg**

Senior Vice President, Partner Marketing & Strategic Alliances

KGruenberg@TheBrandUSA.com

### **Cathleen Domanico**

Vice President, Global Trade Development

CDomanico@TheBrandUSA.com

### **Tracy Lanza**

Vice President, Integrated Marketing

TLanza@TheBrandUSA.com

### **Stanley Mattos**

Vice President, Financial Operations &  
Facilities Operations

SMattos@TheBrandUSA.com

### **Joann Pelipesky**

Vice President, Human Resources &  
Administration

JPelipesky@TheBrandUSA.com

### **Carroll Rheem**

Vice President, Research & Analytics

CRheem@TheBrandUSA.com

### **Aaron Wodin-Schwartz**

Vice President, Public Policy & Public Affairs

AWodinSchwartz@TheBrandUSA.com

# Geography

The Korean peninsula is located in Northeast Asia. It is surrounded by the ocean on three sides, making it a unique geographical location. With Seoul as its capital city, the landsite is roughly 1,030 km (612 miles) long and 175 km (105 miles) wide at its narrowest point. Korea's total land area is 100,033 km<sup>2</sup>, neighboring Japan to the east, China to the west, and sharing a northern border with Democratic People's Republic of Korea (North Korea).

## Area

99,720 sq km

Source: CIA World Factbook 2018

## Climate

The Republic of Korea lies in the temperate zone with four distinct seasons. Due to its geographical location, it shows complex climate characteristics which 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).

Source: CIA World Factbook 2018

# Demographics

## Population

51,181,299 (2017 est.)

Source: CIA World Factbook 2018

## Largest Cities

**Seoul (Capital):** 9.774 million

**Busan:** 3.216 million

Source: World Factbook 2018

## Age Structure

Age	USA	South Korea
0-14 years	18.9%	13.21%
15-24 years	13.6%	12.66%
25-54 years	39.7%	45.52%
55-64 years	12.7%	14.49%
65 years and older	14.8%	14.12%
Median age	36.7 years	41.8 years
Population growth rate (2015 est.)	0.78%	0.48%

Source: CIA World Factbook 2018



# Economy

**GDP:** \$2.027 trillion

**GDP real growth rate:** 3% (2017 est.)

**GDP—per capita:** \$39,400 (2017 est.)

Source: World Factbook 2018

**Unemployment rate:** 3.8% (2017 est.)

**Inflation rate:** 1.9% (2017 est.)

Source: World Factbook 2018

## Vacation Allocation and Public Holidays

South Korea has 12 legal public holidays in a year. Most business will be closed and people will be on vacation during the holidays.

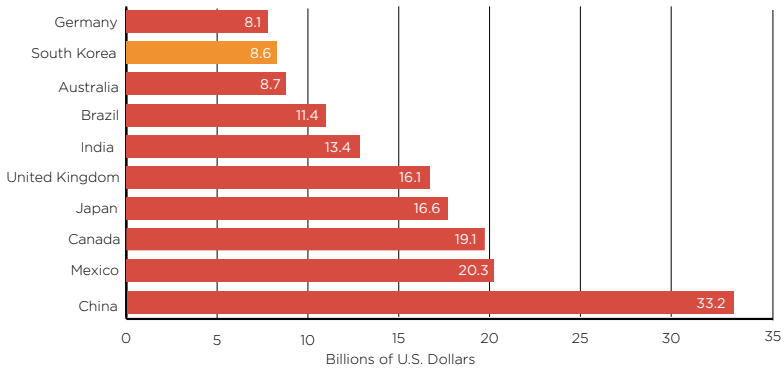
Holiday	Day	Days Celebrated	2017 Dates
New Year's Day	January 1	1 day	January 1, 2018
Lunar New Year	February 16	3 days	February 15-17, 2018
Independence Movement Day	March 1	1 day	March 1, 2018
Children's Day	May 5	1 day	May 5, 2018
Buddha's Birthday	May 22 of the lunar calendar	1 day	May 22, 2018
Memorial Day	June 6	1 day	June 6, 2018
National Liberation Day	August 15	1 day	August 15, 2018
Korean Thanksgiving Day	September 23 of the lunar calendar	3 days	September 23-25, 2018
National Foundation Day	October 3	1 day	October 3, 2018
Hangul Proclamation Day	October 9	1 day	October 9, 2018
Christmas Day	December 25	1 day	December 25, 2018

## Primary Travel Periods

- Traditionally, the peak season for Korean outbound travel is generally 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 2016, the highest number of Koreans traveled to the USA during July (194,637 pax), followed by December (186,080 pax), January (180,240 pax), September (178,427 pax), and June (171,761 pax).

# International Visitation Trends\*

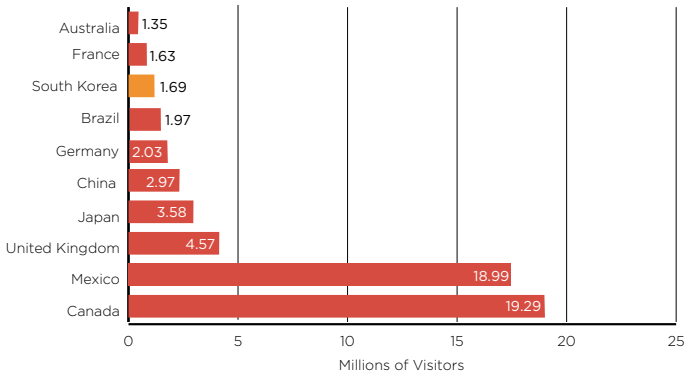
## Visitor Spending, 2016



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

## International Arrivals to the USA, 2016

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



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

\*U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.

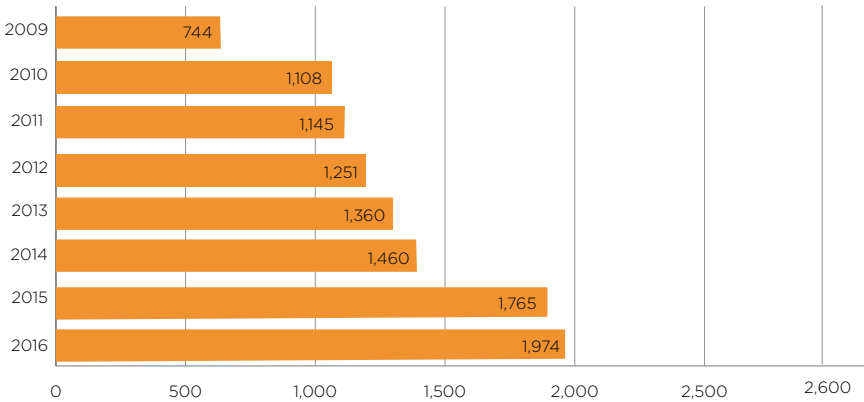
# Travel Trends\*

## Spending Trends (Exports) (US\$ Million)

Year	Total Travel & Tourism Exports	Travel Receipts	Passenger Fare Receipts	Change (%) in Total Exports
2009	\$4,624	\$4,535	\$89	-10
2010	\$5,788	\$5,694	\$94	25
2011	\$6,026	\$5,903	\$123	4
2012	\$6,048	\$5,913	\$135	0
2013	\$7,108	\$6,966	\$142	18
2014	\$7,398	\$7,244	\$154	4
2015	\$8,117	\$7,973	\$144	10
2016				
Change 2016/2009	\$2,979	\$2,958	\$21	58

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

## Visitation Trends (arrivals)



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

\*U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.

# Traveler Characteristics\*

## Main Purpose of Trip

Main Purpose of Trip	2015 (%)	2016 (%)	Point Change
Vacation/Holiday	62	67	5.1
Visit Friends/Relatives	17	12	-4.3
Business	8	9	0.6
Education	6	5	-1.2
Convention/Conference/Tradeshow	7	6	-0.5
Health Treatment	0.1	0.0	-0.1

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

## Select Traveler Characteristics

Traveler Characteristics	2015	2016	Change
Length of Stay in U.S. (mean nights)	15.0	13.7	-1.3
Length of Stay in the U.S. (median nights)	6	6	0.0
First International Trip to the U.S.	43	48	4.8

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

## Activity Participation While in the USA

Activity Participation While in the U.S.	2015 (%)	2016 (%)	Point Change
Shopping	74	72	-1.4
Sightseeing	80	77	-2.4
Experience Fine Dining	21	25	4.0
National Parks/Monuments	24	26	2.1
Art Gallery/Museum	19	18	-0.9
Amusement/Theme Parks	18	20	1.8
Small Towns/Countryside	13	9	-3.6
Visit Historical Locations	17	15	-1.7
Cultural/Ethnic Heritage Sites	17	13	-3.7
Guided Tours	12	10	-1.5

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

\*U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.

## USA Destinations Visited (States, Cities and Regions)

Visitation to U.S. Destinations/ Regions	Market Share 2015 (%)	Volume 2015 (000)	Market Share 2016 (%)	Volume 2016 (000)
<b>Regions</b>				
Pacific Islands	41.65	735	45.83	905
<b>States</b>				
Hawaii	14.20	251	15.43	305
<b>Cities</b>				
Honolulu Oahu	12.04	212	**	**

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

## Transportation Used in the United States

Transportation Types Used in the U.S.	2015 (%)	2016 (%)	% Change
Air travel between U.S. Cities	24	22	-2.4
Bus between Cities	22	22	-0.5
City Subway/Tram/Bus	25	24	-1.4
Auto, Private or Company	24	21	-2.7
Rented Auto	38	41	3.1
Taxi/Cab/Limousine	30	30	-0.1

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

\*U.S. Department of Commerce National Travel and Tourism Office data to be revised during calendar year 2018.

# Air Travel Information

## Direct Flights between USA and South Korea

U.S. Destinations	Airlines	Frequency
Los Angeles	Korean Air	2 Daily
	Asiana Airlines	2 Daily
San Francisco	Korean Air	2 Daily
	Asiana Airlines	Daily
	United Airlines	Daily
Seattle	Korean Air	5 Weekly
	Asiana Airlines	Daily
	Delta Air Lines	Daily
Chicago	Korean Air	Daily
	Asiana Airlines	Daily
New York City	Korean Air	2 Daily
	Asiana Airlines	Daily
Atlanta	Korean Air	Daily
	Delta Air Lines	Daily
Dallas	Korean Air	4 Weekly
	American Airlines	Daily
Washington, DC	Korean Air	Daily
Las Vegas	Korean Air	5 Weekly
Detroit	Delta Air Lines	Daily
Honolulu	Korean Air	Daily
	Asiana Airlines	Daily
	Hawaiian Airlines	5 Weekly
Guam	Korean Air	18 Weekly
	Jeju Air (LCC)	3 Daily
	Jin Air (LCC)	2 Daily
	T-way (LCC)	2 Daily
	Air Seoul (LCC)	Daily
	Air Busan (LCC)	4 Weekly
Saipan	Asiana Airlines	Daily
	Jeju Air (LCC)	3 Daily
	Jin Air (LCC)	4 Weekly
	T-way (LCC)	Daily

Source: Road Sky Airlines Timetable (2018.03)

# Market Snapshot

- The number of Koreans traveling overseas reached a peak of 26,496,447 in 2017, up 18.4 percent from the previous year.
- China, Japan and Southeast Asia are the top travel destinations for Koreans, representing over 80 percent of outbound travel. This reflects Koreans' preference to take short-haul trips due to relatively short holiday availability of less than one week. The USA was the only long-haul destination that Koreans listed in their Top 10 in 2016.
- Koreans' overseas spending continues on an upward trend, according to Korea Bank. Their overseas outlays reached the highest level ever, \$8.06 billion, in the third quarter of 2017, up 5.4 percent from the same period a year earlier.
- A Korea National Tourism Survey revealed that "seeing natural scenery" (23.7 percent) was the main reason for Koreans to escape from city life. And "gourmet tours" (15.4 percent) have become another travel trend allowing them to experience distinctive local food.
- In 2017, Koreans' most popular methods for obtaining travel-related information were portal sites (79.7 percent), followed by travel agent websites (9.6 percent) and SNS (7.5 percent).
- Korean travel agents are rapidly shifting their focus from group package tours to FIT travel. With the exploding use of the Internet in Korea, and the adoption of a five-day work week, more Koreans are booking FIT tours, such as Airtel (air + hotel) packages, and developing their own itineraries with preferred optional activities.
- Air ticket sales results reported by Bank Settlement Plan (BSP) in 2017 show the top five travel agencies accounted for more than 40 percent of the whole market. These are Hana Tour, Mode Tour, Interpark Tour, Yellow Balloon Tour and Online Tour.



# Brand USA Online Channels

## Digital/Social Marketing

Brand USA employs digital and social media marketing strategies to inspire, engage, and activate international travelers to visit the United States during the year through:

- Proprietary website platforms
- Social media channels
- Global digital marketing and social campaigns
- Online video
- Retargeting and other targeted advertising

## PROPRIETARY CONSUMER WEBSITE PLATFORMS

Brand USA has two online consumer identities in the marketplace:

- VisitTheUSA (VisitTheUSA.com), which is active 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.

## 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](http://VisitTheUSA.com)
- Twitter: [@VisitTheUSA](https://twitter.com/VisitTheUSA)
- Facebook: [Facebook.com/VisitTheUSA](https://www.facebook.com/VisitTheUSA)
- YouTube: [YouTube.com/VisitTheUSA](https://www.youtube.com/VisitTheUSA)
- Instagram: [VisitTheUSA](https://www.instagram.com/VisitTheUSA)

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

- Global: [#VisitTheUSA](https://twitter.com/VisitTheUSA)
- Flavors/Culinary: [#TasteUSA](https://twitter.com/VisitTheUSA)
- Road Trips: [#RoadTripUSA](https://twitter.com/VisitTheUSA)
- Great Outdoors: [#OutdoorsUSA](https://twitter.com/VisitTheUSA)
- Market the Welcome: [#USAWelcome](https://twitter.com/VisitTheUSA)

In addition to leveraging these global channels, Brand USA currently has localized social media efforts in the following markets via the channels shown in Chart 1.

CHART 1

Digital Channels

MARKET	URL	Local Tagline	FACEBOOK	TWITTER	HASHTAG	INSTAGRAM	YOUTUBE
Australia	VisitTheUSA.com.au	Plan Your USA Trip Now	facebook.com/VisitTheUSAau	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Brazil	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	facebook.com/VisiteOsUSA	@VisiteOsUSA	#VisiteOsUSA	VisitTheUSA	YouTube.com/VisiteOsUSA
Canada: English	VisitTheUSA.ca	Plan Your USA Trip Now	facebook.com/VisitTheUSAcA	@VisitTheUSAcA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Canada: French	frVisitTheUSA.ca	Planifiez Votre Voyage Aux USA Dès Maintenant	facebook.com/VisitTheUSAcA	@VisitTheUSAcA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSApr
Chile	VisitTheUSA.cl	Planifica tu viaje a USA ahora	facebook.com/VisitTheUSAcl	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
China	GoUSA.cn	即刻定制您的USA旅行计划	n/a	Sina Weibo (Chinese microblogging site/hybrid of Twitter and Facebook): <a href="http://weibo.com/GoUSAcn">http://weibo.com/GoUSAcn</a> Youku (YouTube equivalent): <a href="http://iyouku.com/gousacn">http://iyouku.com/gousacn</a> Wechat (Chinese mobile social network for texting, images, music and articles sharing, mobile only) 美国国家旅游局			
Colombia	VisitTheUSA.co	Planifica tu viaje a USA ahora	facebook.com/VisitTheUSAcO	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
France	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	facebook.com/VisitTheUSApr	@VisitTheUSApr	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSApr
Germany	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	facebook.com/VisitTheUSAdE	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSAdE
India	GoUSA.in	Plan Your USA Trip Now	facebook.com/GoUSAin	@GoUSAin	#VisitTheUSA	VisitTheUSA	YouTube.com/GoUSAin
Japan	GoUSA.jp	今すぐUSAへの旅の計画を	facebook.com/GoUSAjp	@GoUSAjp	アメリカ旅行	VisitTheUSA	YouTube.com/GoUSAjp
Mexico	VisitTheUSA.mx	Planifica Tu Viaje A USA Ahora	facebook.com/VisitTheUSAmx	@VisitTheUSAes	#VisitTheUSA	VisitTheUSA	(Spanish) YouTube.com/VisitTheUSAes
Korea	GoUSA.orkr	지금 USA 여행을 계획해보세요	facebook.com/GoUSAkr	@GoUSAkr	#미국여행	VisitTheUSA	YouTube.com/GoUSAkr
Sweden	VisitTheUSA.se	Plan Your USA Trip Now	facebook.com/VisitTheUSAse	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
Taiwan	GoUSA.tw	立即訂製專屬你的美國之旅	facebook.com/GoUSA.offical	@VisitTheUSA	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA
United Kingdom	VisitTheUSA.co.uk	Plan Your USA Trip Now	facebook.com/VisitTheUSAuk	@VisitTheUSAuk	#VisitTheUSA	VisitTheUSA	YouTube.com/VisitTheUSA

# 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 5 Motivations for Selecting Last Intercontinental Destination

Motivation	% Selected
Cultural Historical Attractions Shopping	58%
Beaches/Seaside Attractions	56%
Ecotourism and Nature	53%
Urban Attractions/Nightlife	44%
Dining/Gastronomy	41%

## Top 5 Strongest Impressions of the USA

Impression	% Selected
Open-minded	53%
Diverse	50%
Energetic	48%
Sophisticated	26%
Adventurous	24%

Question: What motivates your desire to visit that destination? Select all that apply. For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply.

Base: Korea intercontinental travelers (N=1001).

Source: Brand USA Market Intelligence Study 2017.

## Top 5 Channels Used in Destination Selection for Last Intercontinental Trip

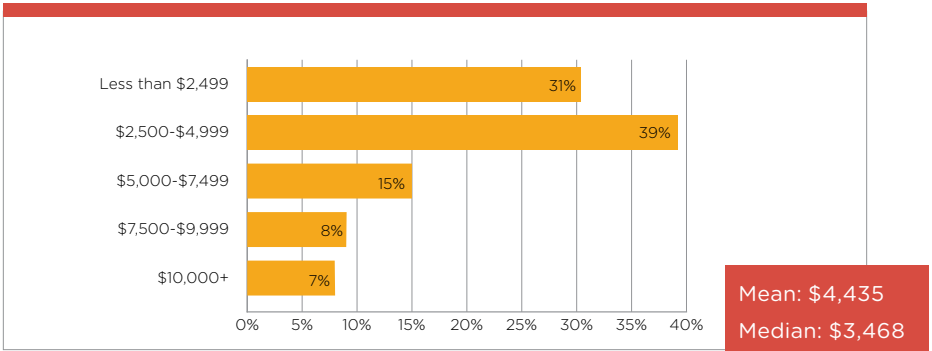
Channels	% Selected
Websites via computer or laptop	67%
Personal recommendations from family and friends	48%
Websites or applications via mobile phone	43%
Personal advice from travel professionals/travel agents	29%
Programs on TV/radio	22%

Question: What sources of information did/will you use to select the destination for this holiday? Select all that apply.

Base: Korea intercontinental travelers (N=1001).

Source: Brand USA Market Intelligence Study 2017.

## Expected Household Travel Spend for Next Intercontinental Trip

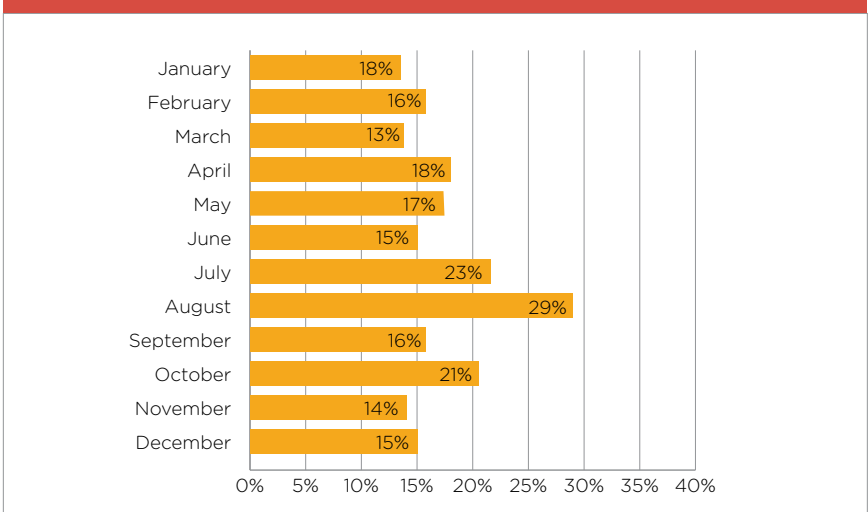


Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours.

Base: Korea intercontinental travelers (N=1001).

Source: Brand USA Market Intelligence Study 2017.

## Months Traveled (April 2015–April 2017)

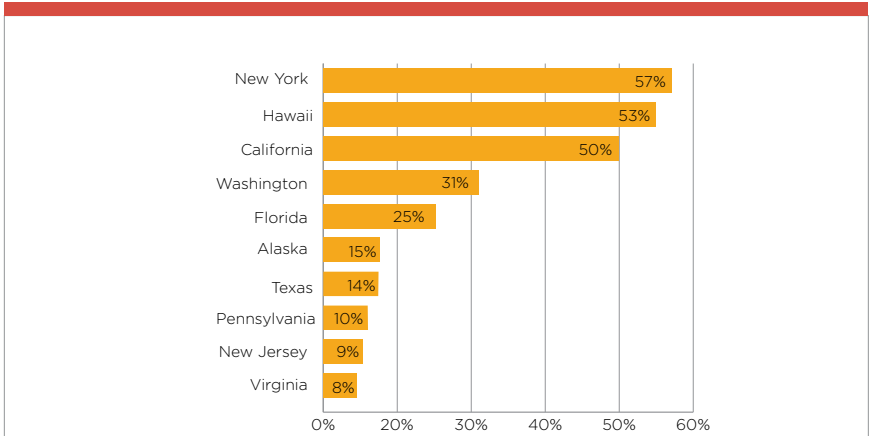


Question: During what month(s) did you take your vacation(s)?

Base: Korea intercontinental travelers (N=1001).

Source: Brand USA Market Intelligence Study 2017.

## Destination Interest—Top 10 States

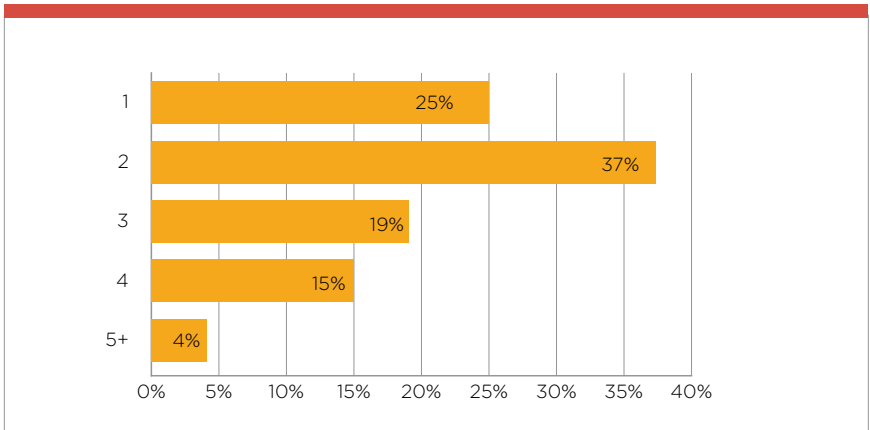


Question: You indicated in a previous question that you have interest in visiting the U.S. sometime in the future. Which U.S. state(s) are you interested in visiting?

Base: Korea intercontinental travelers with interest in visiting the United States (N=977).

Source: Brand USA Market Intelligence Study 2017.

## Expected Travel Party Size of Next Intercontinental Trip

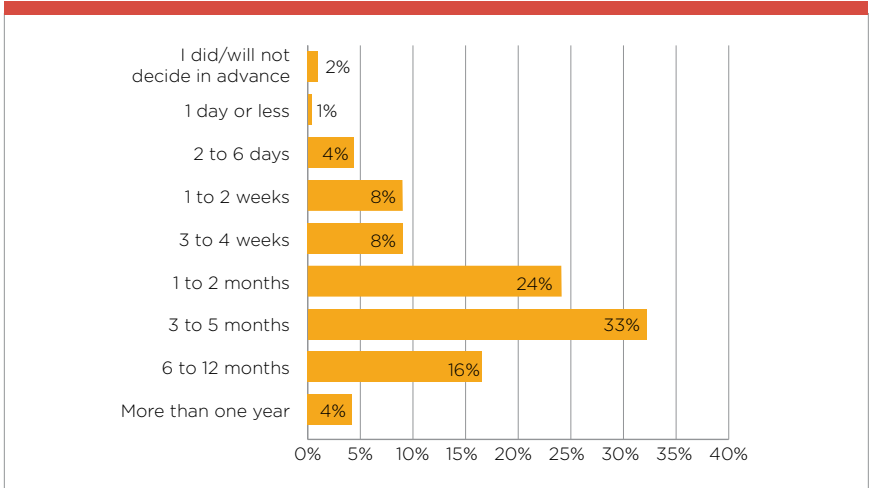


Question: How many people will travel with you on this holiday? Select all that apply.

Base: Korea intercontinental travelers.

Source: Brand USA Market Intelligence Study 2017.

## Destination Decision for Next Intercontinental Trip

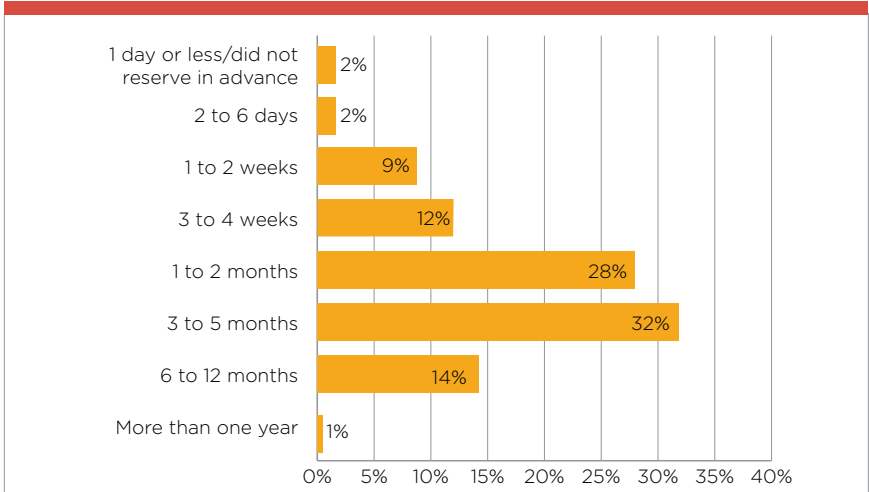


Question: How far in advance of your departure date did/will you decide on the destination?  
Please select one answer for each of the following questions. Note: Totals may not add up to 100% due to rounding.

Base: Korea Intercontinental travelers(N=1002).

Source: Brand USA Market Intelligence Study 2017.

## Air Booking for Next Intercontinental Trip

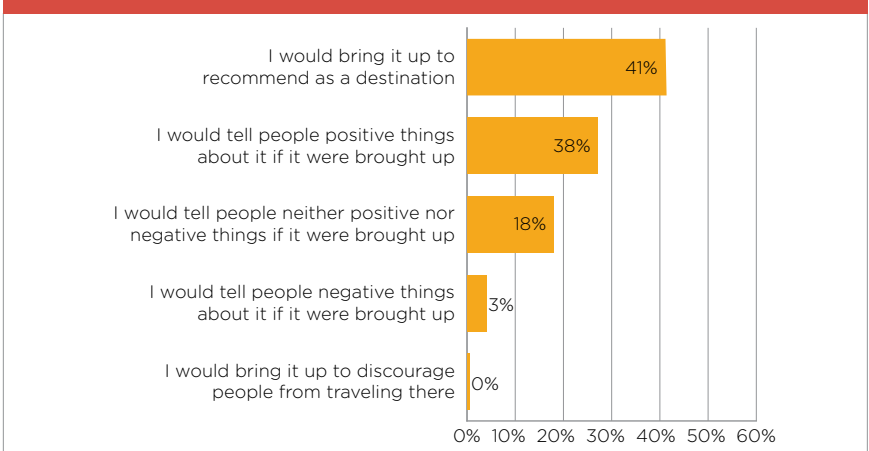


How far in advance of your departure date did/will you book the travel products for this holiday?  
Select one option from the drop-down box. Note: Totals may not add up to 100% due to rounding.

Base: Korea Intercontinental travelers.

Source: Brand USA Market Intelligence Study 2017.

## Net Promoter

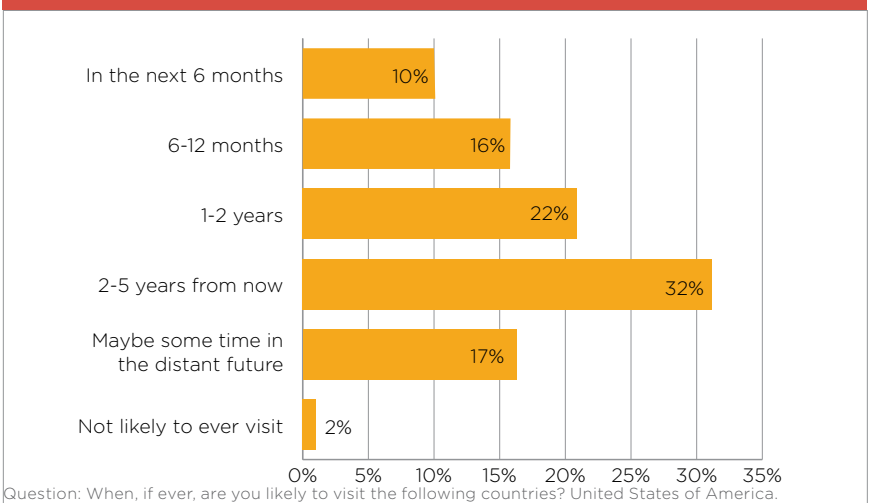


Question: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries?

Base: Korea Intercontinental travelers (N=1001).

Source: Brand USA Market Intelligence Study 2017.

## Likelihood of Travel to the USA



Question: When, if ever, are you likely to visit the following countries? United States of America.

Base: Korea intercontinental travelers (N=1001).

Source: Brand USA Market Intelligence Study 2017.



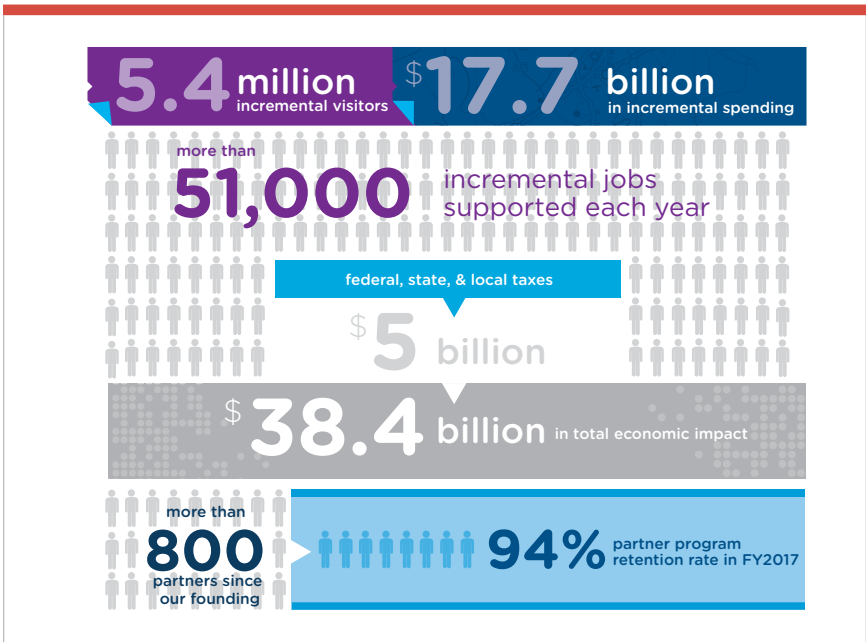
# Brand USA Highlights

## Brand USA is building on success.

With the support of its many partners worldwide, Brand USA has grown from a start-up organization (that launched its first full year in operation in 2012 with just 89 partners) to an organization that has worked with and been supported by over 800 partners worldwide.

## Here is some of what we've accomplished with the support of our partners since we began operations in 2011:

- Generated 5.4 million incremental international visitors to the USA over the past five years, which has benefited the U.S. economy with \$38.4 billion in total economic impact, and supported more than 51,000 incremental jobs a year (source: Oxford Economics).



Sources: ROI data provided by Oxford Economics.

Partner and partner program retention data provided by Brand USA internal reporting.

- Increased active consumer engagement with Brand USA assets (website page views, social interaction and social ad engagement) by 29 percent in FY2017.

- Continued to execute the USA consumer campaign in 14 markets (Australia, Brazil, Canada, Chile, China, Colombia, France, Germany, India, Japan, South Korea, Mexico, Sweden, and the United Kingdom Colombia and Sweden). In total, these markets generate more than 80 percent of all international visitation to the United States.
- With the launch of a “social first” storytelling approach in 14 markets, including OOH, OLV, digital display, social, search, native, and influencer media, the “GO” campaign resulted in almost 6.5 billion impressions.
- Brought 23 percent more members of the travel trade to the USA via our three MegaFams, which included 287 travel agents (of which 49 were product developers) from three countries (China, United Kingdom & Ireland, and Mexico).
- Hosted three sales missions (to India, Japan/Korea and China) with 108 U.S. delegates who promoted their travel brands and destinations to more than 1,618 Buyers.
- Leveraged \$52.5 million in contributed media from 35 global media partners, plus an additional \$5.7 million of in-kind contributions, to promote travel to the USA directly to consumers in numerous international markets. This compares to \$49 million in contributed media from 29 global media partners in FY2016.
- Increased earned media exposure for corporate media relations efforts by 41 percent over FY2016, reaching 2.7 billion impressions and an ad equivalency of nearly \$230 million in FY2017.
- Generated more than \$100 million in industry contributions, including cash contributions of \$43.5 million (compared to \$53 million in FY2016) an in-kind contributions of \$66.3 million (compared to \$47 million in FY2016) in recognized revenue—representing 40 percent in cash contributions and 60 percent in in-kind contributions for the year.
- Grew Brand USA’s partnership network from 707 in FY2016 to 851 partners through FY2017 (a 20 percent increase).

By all these measures and more, Brand USA’s marketing efforts are working—effectively and efficiently.

# 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, including:

- Argentina
- Australia
- Austria
- Bahamas
- Belgium
- Belize
- Brazil
- Canada
- Chile
- China
- Colombia
- Costa Rica
- Denmark
- Ecuador
- El Salvador
- France
- Germany
- Guatemala
- Honduras
- Hong Kong
- India
- Ireland
- Italy
- Japan
- South Korea
- Mexico
- Netherlands
- New Zealand
- Nicaragua
- Norway
- Panama
- Peru
- Qatar
- Russia
- Singapore
- Spain
- Sweden
- Switzerland
- Taiwan
- Turkey
- United Arab Emirates
- United Kingdom
- Venezuela

# 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 and consumer fairs, workshops and programs for travel agents, newsletters, and more.

Visit USA committees are 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 in markets where Brand USA has established international representation and in select markets where the organization is not currently represented.

# About the U.S. Commercial Service

The U.S. Commercial Service (USCS) is the trade promotion arm of the U.S. Department of Commerce's International Trade Administration (ITA). 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 service 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. Our specialists in South Korea can be reached at the contact details below.

## Contact:

Jessica Son  
Senior Commercial Representative  
[jessica.son@trade.gov](mailto:jessica.son@trade.gov)

Daniel Lew  
Commercial Attaché  
[daniel.lew@trade.gov](mailto:daniel.lew@trade.gov)

# Our Partnership with the U.S. Department of Commerce

Brand USA collaborates closely with the International Trade Administration, U.S. Department of Commerce, through its National Travel and Tourism Office (NTTO) and U.S. Commercial Service Offices in international markets.



In addition, Brand USA works in close partnership with Visit USA committees in market and more than 800 contributing partners throughout the world to implement highly successful campaigns that are inspiring an increasing number of travelers to visit the USA

## The National Travel & Tourism Office (NTTO)

The NTTO is the federal liaison to 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 partners.

The NTTO also serves as the official source of national travel and tourism statistics to inform policy and private-sector decision making. These data are used by the Bureau of Economic Analysis to calculate the balance of payments for travel and tourism and measure the economic impact of international visitation to the United States. Furthermore, NTTO advances policies that support travel and tourism export growth and addresses export barriers in key international markets.

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

## **Selected Staff List:**

### **Isabel Hill**

Director

Isabel.Hill@trade.gov

### **Brian Beall**

Deputy Director, Policy and Planning

Brian.Beall@trade.gov

### **Julie Heizer**

Team Lead, Industry Relations

Julie.Heizer@trade.gov

### **Jennifer Aguinaga**

International Trade Specialist

Jennifer.Aguinaga@trade.gov

### **Mark Brown**

Market Research Analyst

Mark.Brown@trade.gov

### **Richard Champley**

Senior Research Analyst

Richard.Champley@trade.gov

### **Curt Cottle**

International Trade Specialist

Curt.Cottle@trade.gov

### **John Terpening**

Economist

John.Terpening@trade.gov

### **Claudia Wolfe**

Economist

Claudia.Wolfe@trade.gov

