Travel and Tourism in South Korea to 2018

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SUMMARY

Rapid economic development in Asian countries has benefitted the South Korean Travel and Tourism sector across all categories – domestic, inbound, and outbound – in terms of both tourism flows and expenditure. The increasing popularity of Korean popular culture known as the Korean wave has increased tourist arrivals from Southeast Asia and India. According to the World Economic Forum Travel and Tourism Competitiveness Index 2013, South Korea ranked sixth among 25 countries in terms of overall Travel and Tourism in Asia-Pacific.

International arrivals to South Korea increased at a compound annual growth rate (CAGR) of XX.XX% during the historic period, while total inbound tourist expenditure recorded a CAGR of XX.XX%. Domestic tourist volumes recorded a CAGR of XX.XX%, while domestic tourist expenditure increased at a CAGR of XX.XX% during the historic period. International departures also increased from XX.XX million in 2009 to XX.XX million in 2013, representing a CAGR of XX.XX%.

The Travel & Tourism intelligence center (TTIC) expects growth in domestic and international tourist volumes and expenditure to continue over the forecast period (2014–2018), driven by government initiatives to promote the country as a major tourist destination. International arrivals and domestic trips are expected to increase at CAGRs of XX.XX% and XX.XX%, respectively, over the forecast period.

SYNOPSIS

The report provides detailed market analysis, information and insights, including:

- Historic and forecast tourist volumes covering the entire South Korean travel and tourism sector
- Detailed analysis of tourist spending patterns in South Korea for various categories in the travel and tourism sector, such as accommodation, sightseeing and entertainment, foodservice, transportation, retail, travel intermediaries and others
- Detailed market classification across each category, with analysis using similar metrics
- Detailed analysis of the airline, hotel, car rental and travel intermediaries industries

REASONS TO BUY

- Take strategic business decisions using historic and forecast market data related to South Korea’s travel and tourism sector
- Understand the demand-side dynamics within South Korea’s travel and tourism sector, along with key market trends and growth opportunities
4.1 The Market

4.1.1 Domestic tourism

Domestic tourist volumes in South Korea increased from XX.XX million in 2009 to XX.XX million in 2013, at a CAGR of XX.XX%, driven by improving economic conditions, rising consumer confidence, and higher disposable incomes. Total domestic tourist expenditure recorded moderate growth at a CAGR of XX.XX%, increasing from KRWXX.XX trillion (US$XX.XX billion) in 2009 to KRWXX.XX trillion (US$XX.XX billion) in 2013.

Figure 1: South Korea – Domestic Tourism Expenditure (KRW Billion), 2009–2018

Source: Korea Culture and Tourism Institute, TTIC analysis

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4.1.2 Inbound tourism

Strong growth was recorded in the South Korean inbound tourism sector during the historic period, with the number of international arrivals rising from XX.XX million in 2009 to XX.XX million in 2013, at a CAGR of XX.XX%. Inbound tourist expenditure also increased at a CAGR of XX.XX%, from KRWXX.XX trillion (US$XX.XX billion) in 2009 to KRWXX.XX trillion (US$XX.XX billion) in 2013, which can be attributed to the marketing initiatives and relaxed visa regulation.

Figure 2: South Korea – International Arrivals by Purpose of Visit, 2009 vs 2013

Source: Korea Tourism Organization, TTIC analysis © Travel & Tourism Intelligence Center
Table 1: South Korea – Tourist Arrivals from Top 10 Countries (Thousand), 2009–2018

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Source: TTIC analysis
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Figure 3: South Korea – Visa Policy

Source: TTIC Analysis
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4.1.3 Outbound tourism

Outbound tourism from South Korea increased significantly from XX.XX million in 2009 to XX.XX million in 2013, at a robust CAGR of XX.XX%. Outbound tourist expenditure grew at a CAGR of XX.XX%, increasing from KRWXX.XX trillion (US$XX.XX billion) in 2009 to KRWXX.XX trillion (US$XX.XX billion) in 2013.

Figure 4: South Korea – International Departures by Mode of Transport, 2009 vs 2013

Source: Korea Tourism Organization, TTIC analysis

© Travel & Tourism Intelligence Center
Table 2: South Korea – Tourist Departures to Top10 Countries (Thousand), 2009–2018

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Source: TTIC analysis © Travel & Tourism Intelligence Center

Figure 5: South Korea – Visa Requirements for South Korean Citizens

Source: TTIC Analysis © Travel & Tourism Intelligence Center
4.2 Methodology

TTIC’s dedicated research and analysis teams consist of experienced professionals with industry backgrounds in marketing, market research, consulting, and advanced statistical expertise.

TTIC adheres to the Codes of Practice of the Market Research Society (www.mrs.org.uk) and the Society of Competitive Intelligence Professionals (www.scip.org).

All TTIC databases are continuously updated and revised.

All Travel and Tourism reports are created by following a comprehensive, four-stage methodology. This includes market study, research, analysis, and quality control.

1) Market Study

A. Standardization

Definitions are specified using recognized industry classifications. The same definition is used for every country. Annual average currency exchange rates are used for the latest completed year. These are then applied across both historical and forecast data to remove exchange rate fluctuations.

B. Internal Audit

- Review of in-house databases to gather existing data:
  - Historic market databases and reports
  - Company database

C. Trend monitoring

- Review of the latest Travel and Tourism companies, and industry trends

2) Research

A. Sources

- Collection of the latest market-specific data from a wide variety of industry sources:
  - Government statistics
  - Industry associations
  - Company filings
  - International organizations
  - Travel and tourism agencies

B. Expert opinion

- Collation of opinions taken from leading Travel and Tourism industry experts
- Analysis of third-party opinion and forecasts:
  - Broker reports
  - Media
  - Official government sources

C. Data consolidation and verification

- Consolidation of data and opinions to create historical datasets
- Creation of models to benchmark data across categories and geographies
3) Analysis

A. Market forecasts
   - Feeding forecast data into market models:
     o Macroeconomic indicators
     o Industry-specific drivers
   - Analysis of Travel and Tourism industry database to identify trends:
     o Latest Travel and Tourism trends
     o Key drivers of the Travel and Tourism industry

B. Report writing
   - Analysis of market data
   - Discussion of company and industry trends and issues
   - Review of financial deals, and Travel and Tourism trends

4) Quality Control

A. Templates
   - Detailed process manuals
   - Standardized report templates and accompanying style guides
   - Complex forecasting tools to ensure that forecast methodologies are applied consistently
   - Quality-control checklists

B. Quality control process
   - Peer review
   - Senior-level QC
   - Random spot checks on data integrity
   - Benchmark checks across databases
   - Market data cross-checked for consistency with accumulated data from:
     o Company filings
     o Government sources
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