Travel and Tourism in South Korea to 2018

Description: Rapid economic development in Asian countries has benefited 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.

- Domestic tourist volumes in South Korea increased from 31.2 million in 2009 to 33.5 million in 2013, at a CAGR of 1.83%. The growth was driven by improving economic conditions, rising consumer confidence, and higher disposable incomes.

- Strong growth was recorded in the South Korean inbound tourism sector during the historic period, with the number of international arrivals rising from 7.6 million in 2009 to 11.9 million in 2013, at a CAGR of 11.84%. Inbound tourist expenditure also increased at a CAGR of 5.84%, from KRW12.5 trillion (US$9.8 billion) in 2009 to KRW15.7 trillion (US$14.3 billion) in 2013. The strong growth in international arrivals can be attributed to marketing initiatives and relaxed visa regulations.

- South Korea’s medical tourism sector has risen significantly during the historic period and the country has established itself as a popular cosmetic surgery destination. The number of medical tourists to South Korea increased from 60,201 in 2009 to 211,218 in 2013, rising significantly at a CAGR of 36.9%. The total number of medical tourists increased from 154,464 in 2012 to 211,218 in 2013, representing an increase of 32.5%.

- China was a key source country for South Korea with 4.3 million Chinese visitors in 2013, up from 2.8 million visitors in 2012. Travel is being supported by policies such as visa-free short-term visits to South Korea.

- The number of cruise tourists to South Korean ports recorded strong growth, benefiting from a drop in cruise travel between China and Japan. According to the Ministry of Oceans and Fisheries (MOF), the number of cruise tourists to South Korea increased from 280,000 in 2012 to 790,000 in 2013.

- The South Korean aviation market performed well during the historic period, with total revenues increasing from KRW11.5 trillion (US$9 billion) in 2009 to KRW17.2 trillion (US$15.7 billion) in 2013, at a CAGR of 10.55%. This growth was driven by an increase in tourist volumes, growth in the number of LCCs and an increase in air capacity.

- South Korea’s hotel market profited from an increase in the number of domestic and international visitors during the historic period. Total hotel revenue increased at a CAGR of 5.91%, from KRW3.2 trillion (US$2.5 billion) in 2009 to KRW4.1 trillion (US$3.7 billion) in 2013, with upscale hotels recording the highest growth in revenue at a robust CAGR of 9.61%.

- South Korea’s car rental market value rose at a CAGR of 11.47%, from KRW2.9 trillion (US$2.3 billion) in 2009 to KRW4.4 trillion (US$4.1 billion) in 2013. Growth was fueled by an increase in international visitors and domestic tourists, as well as a rising number of business events taking place in the country.

- South Korea’s travel intermediaries’ industry value increased at a CAGR of 11.29%, from KRW3.2 trillion (US$2.5 billion) in 2009 to KRW4.9 trillion (US$4.4 billion) in 2013. This growth has been driven by increases in leisure and business travel, and a rise in online bookings.

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, food service, transportation, retail, travel intermediaries, and others
Reasons To Buy

- Make strategic business decisions using historic and forecast market data related to the South Korean Travel and Tourism sector.
- Understand the demand-side dynamics within the South Korean Travel and Tourism sector, along with key market trends and growth opportunities.

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