



# Korea Fact Sheet

## Korea Overview

AVIAREPS Marketing Garden Holdings Ltd. is contracted by HTA for Brand Marketing and Management Services in Korea. Korea is an important source market from Asia for Hawai'i. Affluent travelers from high-end market segments are primarily from the Seoul and Busan regions. Hawai'i continues to be a favored romance destination for Koreans. In 2022, the core branding message is Mālama Hawai'i and the marketing strategy to recover the Hawai'i travel market from the COVID-19 pandemic is to revitalize travel demand in collaboration with industry partners, accelerate booking pace in partnership with online booking platforms, and develop marketing co-ops with key airlines to stimulate resumption and growth in air services to Hawai'i.

## Year-to-date November 2022 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$246.4 million
Primary Purpose of Stay:	Pleasure (89,663) vs. MCI (3,620)
Average Length of Stay:	8.82 days
First Time Visitors:	73.8%
Repeat Visitors:	26.2%

Korea (by Air)	2019	2020	2021	2022 Annual Forecast*	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
Visitor Expenditures (\$ Millions)	497.9	NA	41.6	252.0	246.4	30.4	711.8%
Visitor Days	1,745,666	404,206	149,496	872,630	848,916	118,285	617.7%
Arrivals	229,056	46,884	10,652	94,014	96,260	8,187	1075.7%
Average Daily Census	4,783	1,104	410	2,391	2,542	354	617.7%
Per Person Per Day Spending (\$)	285.2	NA	278.0	288.7	290.31	256.6	13.1%
Per Person Per Trip Spending (\$)	2,173.7	NA	3,901.5	2,680.1	2,560.2	3,707.8	-31.0%
Length of Stay (days)	7.62	8.62	14.03	9.28	8.82	14.45	-39.0%

NA= Comparative annual 2020 visitor spending statistics were not available, as the Departure Survey could not be conducted between April to October 2020 due to COVID-19 restrictions.

\*Dept. of Business, Economic Development & Tourism (DBEDT) 2022 annual forecast (Quarter 1, 2022).

## Contact Information

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<sup>1/</sup> 2022 visitor data are preliminary. 2021, 2020 and 2019 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

## Market Summary

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Prior to the pandemic, Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. On March 26, 2020, the state implemented mandatory quarantine and travel restrictions. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. In October 2020, the state initiated the Safe Travels program, which allowed travelers to bypass quarantine if they had a valid negative COVID test. Through March 25, 2022, domestic passengers could bypass the state's mandatory self-quarantine if they were vaccinated or have a negative COVID pre-travel test. The Safe Travels program ended on March 26, 2022. In November 2022, there were no travel restrictions for passengers arriving to Hawai'i on domestic direct flights from the U.S. Mainland, or for passengers arriving on direct international flights.

- Through the first 11 months of 2022, there were 96,260 visitors from Korea compared to 206,223 visitors (-53.3%) in the first 11 months of 2019.
- There were 611 scheduled flights with 192,185 seats in the first 11 months of 2022, compared to 930 flights (-34.3%) with 296,706 seats (-35.2%) in the first 11 months of 2019.
- For all of 2021, 10,652 visitors arrived from Korea. In comparison, there were 46,884 visitors (-77.3%) from Korea in 2020, and 229,056 visitors (-95.3%) in 2019.
- There were 140 scheduled flights and 39,160 seats from Korea in 2021 compared to 238 flights and 72,287 seats in 2020, and 1,027 flights and 326,398 seats in 2019.

## Market Conditions

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- Korea's exports fell 14 percent from a year earlier to \$51.9 billion in November 2022 due to the strong U.S. currency.
- In November 2022, the currency exchange rate was 1,359.45(KRW/USD), which appreciated slightly from the previous month's 1,430.91 (KRW/USD).
- Korea recorded 87.9 percent vaccination rate and 65.7 percent booster rate as of November 30, 2022. The rate of 4th shots is 14.8 percent. The government has shortened the COVID-19 vaccination interval from 4 months to 3 months, due in part to predictions that the winter epidemic peak may come earlier than expected.
- The number of international passengers in October 2022 was over 2.5 million, an increase of 580,000 from the previous month. This amount is the largest since 3,971,511 passengers in February 2020, just before the COVID-19 pandemic began in earnest.
- The government has permitted the resumption of international flights on 29 routes from October 30, 2022, the start of this year's winter period. As a result, international flights during the winter season have increased to a total of 162 routes and 2,711 flights per week. This represents 57.5 percent of pre-COVID international flights during the winter period of 2019.
- The airline industry officially held a job fair at Incheon International Airport in October 27-28, 2022. Major airlines as well as most low-cost carriers set up booths to welcome job seekers. Korean Air will hire more than 100 cabin crews and Air Premia with 70 operation staff. Asiana Airlines is also planning to start hiring early next year in line with the recovery in passenger demand.

- Expedia Group released its 2023 travel trends outlook report, predicting that a wave of unexpected trends would emerge. It characterized this as a shift to the “no-normal,” a concept that contrasts with the anticipated “new-normal.” According to the survey:
  - 26 percent of Korean travelers said they valued economic aspects more than ever, and worldwide interest in 3-star hotels has increased by more than 20 percent.
  - More than half (59%) of Korean travelers responded that they were more interested in wellness travel than before and, among them, Millennials showed a high response rate.
  - The top three reasons to be positive on the wellness journey were: 'I'm more focused on my mental and physical health than ever,' 'I want to find new ways to improve my mental and physical health,' and 'wellness was interrupted by the pandemic.'
  - Millennial travelers identified 'Maldives (28%),' 'Korea (26%),' 'USA (24%),' 'Bali (20%)' and 'Japan (18%)' as their preferred wellness destinations.
- Airlift in November 2022: Korean Air operates daily flights. Hawaiian Airlines operates 5 weekly flights. Asiana Airlines operates 5 weekly flights in November, and will provide daily service from December 22, 2022.

## Distribution by Island

Korea (by Air)	2019	2020	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
O'ahu	225,488	46,133	9,678	94,256	7,380	1177.1%
Maui County	29,619	4,711	1,299	9,393	912	929.9%
Maui	29,303	4,668	1,268	9,322	897	938.7%
Moloka'i	846	71	31	115	11	906.6%
Lāna'i	499	105	14	162	13	1179.4%
Kaua'i	7,191	1,361	332	2,241	283	691.2%
Island of Hawai'i	25,273	6,923	1,215	12,951	744	1641.3%

## Airlift: Scheduled Seats and Flights

Scheduled seats	2022					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Seoul	25,636	48,135	70,482	72,992	217,245	3,614	6,950	10,008	18,588	39,160	609.4	592.6	604.3	292.7	454.8

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules as of December 22, 2022, subject to change.

Scheduled flights	2022					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Seoul	91	152	219	227	689	13	25	36	66	140	600.0	508.0	508.3	243.9	392.1

Source: DBEDT analysis based on scheduled flights from Diio Mi flight schedules as of December 22, subject to change.

## Group vs. True Independent; Leisure vs. Business

Korea (by Air)	2019	2020*	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
Group vs True Independent (Net)						
Group Tour	35,289	NA	801	8,956	586	1427.3%
True Independent (Net)	134,413	NA	7,747	63,723	6,070	949.8%
Leisure vs Business						
Pleasure (Net)	218,691	44,623	8,533	89,663	6,361	1309.6%
MCI (Net)	5,574	840	299	3,620	216	1575.6%
Convention/Conf.	3,184	331	110	1,577	39	3981.5%
Corp. Meetings	232	23	86	85	86	-0.9%
Incentive	2,183	487	111	1,984	99	1912.9%

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

## First Timers vs. Repeat Visitors

Korea (by Air)	2019	2020*	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
First Time Visitors (%)	73.7	NA	49.4	73.8	45.2	28.6
Repeat Visitors (%)	26.3	NA	50.6	26.2	54.8	-28.6

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

## Tax Revenue

Korea (by Air)	2019	2020*	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	58.12	NA	4.85	28.59	3.54	706.8%

<sup>2/</sup>State government tax revenue generated (direct, indirect, and induced).