



Korea Fact Sheet

Korea Overview

The Hawai'i Tourism Authority selected AVIAREPS Marketing Garden Holdings Ltd. For Brand Marketing and management Services in Korea. In 2025, Hawai'i Tourism Korea (HTK) focuses on strengthening Hawai'i's position as a top destination for Korean travelers by collaborating closely with key travel trade partners, prominent consumer brands, and influential media outlets in consumer campaigns and market education.

Year-to-Date March 2025 Quick Facts^{1/}

Visitor Expenditures:	\$102.7 million
Primary Purpose of Stay:	Pleasure (37,123) vs. MCI (941)
Average Length of Stay:	8.41 days
First Time Visitors:	66.4%
Repeat Visitors:	33.6%

Korea (by Air)	2019	2020	2021	2022	2023	2024RP	2025 Annual Forecast*	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
Visitor Expenditures (\$ Millions)	497.9	NA	41.6	283.5	430.3	412.2	408.4	102.7	125.4	-18.1%
Visitor Days	1,745,666	404,206	149,496	967,259	1,362,397	1,295,712	1,270,854	328,923	403,860	-18.6%
Arrivals	229,056	46,884	10,652	111,863	161,706	155,562	153,115	39,118	46,038	-15.0%
Average Daily Census	4,783	1,104	410	2,650	3,733	3,540	3,482	3,655	4,438	-17.7%
Per Person Per Day Spending (\$)	285.2	NA	278.0	293.1	315.8	318.1	321.3	312.1	310.5	0.5%
Per Person Per Trip Spending (\$)	2,173.7	NA	3,901.5	2,534.7	2,660.9	2,649.9	2,667.1	2,624.1	2,724.0	-3.7%
Length of Stay (days)	7.62	8.62	14.03	8.65	8.43	8.33	8.30	8.41	8.77	-4.1%

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) 2025 annual forecast (Quarter 1, 2025).

Contact Information

Hawai'i Tourism Authority: Jadie Goo, Sr. Brand Manager
 Tel: (808) 973-2252
jadie@gohta.net

Hawai'i Tourism Korea: Irene Lee, Korea Country Director
 Tel: 82 (2) 777-0033
llee@aviareps.com

^{1/} 2024P and 2025P visitor data are preliminary. RP=March 2024 data were revised. 2019 – 2023 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

- In the first quarter of 2025, 39,118 visitors arrived from Korea, total visitor spending was \$102.7 million and daily visitor spending was \$312 per person. There were 46,038 visitors (-15.0%) in the first quarter of 2024, total visitor spending was \$125.4 million (-18.1%) and daily visitor spending was \$311 per person (+0.5%). In the first quarter of pre-pandemic 2019, 63,131 visitors (-38.0%) arrived from this market, total visitor spending was \$135.8 million (-24.4%) and daily visitor spending was \$267 per person (+17.0%).
- In The first quarter of 2025, there were 220 scheduled flights with 63,376 seats from Seoul, compared to 256 flights (-14.1%) with 78,350 seats (-15.3%) in the first quarter of 2024 and 271 flights (-18.8%) with 88,217 seats (-24.8%) in the first quarter of 2019.
- In 2024, 155,562 visitors arrived from Korea, total visitor spending was \$412.2 million and daily visitor spending was \$318 per person. There were 161,706 visitors in 2023, total visitor spending was \$430.3 million and daily visitor spending was \$316 per person. In pre-pandemic 2019, 229,056 visitors arrived from this market, total visitor spending was \$497.9 million and daily visitor spending was \$285 per person.
- In 2024, 923 scheduled flights with 278,982 seats serviced Hawai'i from Korea. In 2023, there were 906 scheduled flights with 278,670 seats. In 2019 there were 1,027 scheduled flights with 326,398 seats.

Market Conditions

- In January 2025, the average exchange rate stood at 1456.71 KRW/USD, representing a slight depreciation from 1441.34 KRW/USD recorded in December 2024.
- The Composite Consumer Sentiment Index (CCSI) in South Korea rose to 91.2 in January 2025, marking an increase of 2.8 points compared to December 2024. This improvement suggests that consumer confidence in the country is strengthening, reflecting more optimistic expectations regarding the economy, employment, and personal financial situations.
- During this year's Lunar New Year holiday, Incheon International Airport set a new record, with an average of 218,978 passengers per day traveling abroad. This marks an 8.4 percent increase from the previous record of 202,085 passengers set during the 2019 Lunar New Year holiday. In total, 2,189,778 passengers passed through the airport between January 24 and February 2, 2025.
- Starting in February 2025, Korean Air and Asiana Airlines will raise their international fuel surcharges. Korean Air will increase its surcharges by 7.1 percent, while Asiana Airlines will raise theirs by 3 percent. These hikes are due to the weakening Korean won and higher exchange rates, along with a slight increase in Singapore jet fuel prices.
- In January 2025, Korean Air operated daily flights, while both Asiana Airlines and Hawaiian Airlines each ran five weekly flights.

Distribution by Island

Korea (by Air)	2019	2020	2021	2022	2023	2024RP	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
O'ahu	225,488	46,133	9,678	109,509	159,755	152,377	38,337	44,743	-14.3%
Maui County	29,619	4,711	1,299	11,035	10,933	7,591	2,551	2,021	26.2%
Maui	29,303	4,668	1,268	10,953	10,518	7,128	2,386	1,849	29.0%
Moloka'i	846	71	31	152	284	324	68	145	-53.1%
Lāna'i	499	105	14	173	528	288	245	27	811.1%
Kaua'i	7,191	1,361	332	2,291	4,538	4,654	1,186	1,949	-39.1%
Island of Hawai'i	25,273	6,923	1,215	15,244	26,866	28,038	7,818	8,875	-11.9%

Airlift: Scheduled Seats and Flights

Scheduled seats	2025					2024					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Seoul	66,376	69,572	91,638	80,483	308,069	78,350	66,553	68,791	65,288	278,982	-15.3	4.5	33.2	23.3	10.4

Scheduled flights	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Seoul	220	229	301	265	1,015	256	221	224	222	923	-14.1	3.6	34.4	19.4	10.0

Source: DBEDT analysis based on scheduled flights and seats from Diio Mi flight schedules as of April 24, 2025, subject to change.

Group vs. True Independent; Leisure vs. Business

Korea (by Air)	2019	2020*	2021	2022	2023	2024P	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
Group vs True Independent (Net)									
Group Tour	35,289	NA	801	10,494	18,958	18,041	4,330	6,801	-36.3%
True Independent (Net)	134,413	NA	7,747	73,398	111,919	111,664	29,241	32,180	-9.1%
Leisure vs Business									
Pleasure (Net)	218,691	44,623	8,533	104,308	152,060	145,179	37,123	43,416	-14.5%
MCI (Net)	5,574	840	299	3,915	5,029	5,882	941	1,303	-27.7%
Convention/Conf.	3,184	331	110	1,600	2,607	3,507	595	512	16.2%
Corp. Meetings	232	23	86	97	262	243	16	189	-91.3%
Incentive	2,183	487	111	2,242	2,168	2,180	332	604	-45.0%

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	2022	2023	2024P	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
First Time Visitors (%)	73.7	NA	49.4	74.8	71.9	68.1	66.4	69.2	-2.8
Repeat Visitors (%)	26.3	NA	50.6	25.2	28.1	31.9	33.6	30.8	2.8

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	2022	2023	2024P	YTD Mar. 2025P	YTD Mar. 2024RP	% Change
State tax revenue generated (\$ Millions) ^{2/}	58.12	NA	4.85	32.89	49.91	47.82	11.91	14.55	-18.1%

^{2/}State government tax revenue generated (direct, indirect, and induced).