



# 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 April 2025 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$131.9 million
Primary Purpose of Stay:	Pleasure (48,455) vs. MCI (1,407)
Average Length of Stay:	8.22 days
First Time Visitors:	67.7%
Repeat Visitors:	32.3%

Korea (by Air)	2019	2020	2021	2022	2023	2024RP	2025 Annual Forecast*	YTD Apr. 2025P	YTD Apr. 2024RP	% Change
Visitor Expenditures (\$ Millions)	497.9	NA	41.6	283.5	430.3	413.3	408.4	131.9	155.0	-14.9%
Visitor Days	1,745,666	404,206	149,496	967,259	1,362,397	1,298,985	1,270,854	419,177	496,652	-15.6%
Arrivals	229,056	46,884	10,652	111,863	161,706	155,974	153,115	51,013	57,709	-11.6%
Average Daily Census	4,783	1,104	410	2,650	3,733	3,549	3,482	3,493	4,105	-14.9%
Per Person Per Day Spending (\$)	285.2	NA	278.0	293.1	315.8	318.1	321.3	314.6	312.1	0.8%
Per Person Per Trip Spending (\$)	2,173.7	NA	3,901.5	2,534.7	2,660.9	2,649.5	2,667.1	2,585.1	2,686.1	-3.8%
Length of Stay (days)	7.62	8.62	14.03	8.65	8.43	8.33	8.30	8.22	8.61	-4.5%

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

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<sup>1/</sup> 2024P and 2025P visitor data are preliminary. RP=March and April 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

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- In the first four months of 2025, 51,013 visitors arrived from Korea, total visitor spending was \$131.9 million and daily visitor spending was \$315 per person. There were 57,709 visitors (-11.6%) in the first four months of 2024, total visitor spending was \$155.0 million (-14.9%) and daily visitor spending was \$312 per person (+0.8%). In the first four months of pre-pandemic 2019, 78,027 visitors (-34.6%) arrived from this market, total visitor spending was \$167.1 million (-21.1%) and daily visitor spending was \$271 per person (+16.2%).
- In The first four months of 2025, there were 292 scheduled flights with 88,275 seats from Seoul, compared to 328 flights (-11.0%) with 99,214 seats (-11.0%) in the first four months of 2024 and 344 flights (-15.1%) with 111,168 seats (-20.6%) in the first four months of 2019.
- In 2024, 155,974 visitors arrived from Korea, total visitor spending was \$413.3 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

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- In April 2025, South Korea's exports reached US\$58.2 billion, marking a 3.7 percent year-on-year increase. This modest growth reflects continued resilience in the country's trade sector, despite global economic uncertainties.
- The Composite Consumer Sentiment Index (CCSI) in South Korea stood at 93.8 in April 2025, showing a 0.4-point increase from March 2025. Although still below the neutral benchmark of 100, the slight gain suggests a cautious improvement in public outlook.
- The average exchange rate in April 2025 was 1,441.09 KRW per USD, showing an appreciation from 1,459.36 KRW/USD in February 2025. A stronger Korean won can enhance consumer confidence in spending on travel to the United States, as a favorable exchange rate increases the purchasing power of Korean travelers abroad.
- Hana Tour and Mode Tour experienced a slowdown in overseas travel demand growth, with both seeing month-over-month declines in February and March 2025 after a strong January. The decline was attributed to political instability, airline accidents, and broader economic challenges.
- In South Korea, experience-focused travel is on the rise, particularly among the MZ generation, prompting both traditional travel agencies and OTAs to adapt. Emotional, immersive packages are gaining popularity over standard sightseeing, while multi-generational family trips and wellness-focused travel especially among women in their 30s and 40s are also growing trends. Additionally, travelers are showing increased interest in unique, small-city destinations that offer more personal and exclusive experiences.

- Air Premia, South Korea's first long-haul hybrid airline, is set to launch its Incheon–Honolulu service on July 2. The route will operate four times per week, with departures from Incheon at 10:30 PM (KST) and arrivals in Honolulu at 11:50 AM (HST). Return flights will leave Honolulu at 2:10 PM, landing in Incheon at 8:20 PM the following day. Tickets became available starting April 7 through the Air Premia website and other sales platforms.
- Asiana Airlines will increase its Incheon–Honolulu flights to daily service starting June 1 to meet rising demand for travel to Hawai'i. To promote the expanded schedule, the airline is offering a 5% discount on tickets purchased by May 8 for travel through June 30. Passengers will also receive a coupon book with special offers at the International Market Place and can enjoy additional discounts on activities like golf and tours through the "Magic Boarding Pass" program.

## Distribution by Island

Korea (by Air)	2019	2020	2021	2022	2023	2024RP	YTD Apr. 2025P	YTD Apr. 2024RP	% Change
O'ahu	225,488	46,133	9,678	109,509	159,755	153,115	50,155	56,437	-11.1%
Maui County	29,619	4,711	1,299	11,035	10,933	7,631	3,309	2,638	25.4%
Maui	29,303	4,668	1,268	10,953	10,518	7,168	3,098	2,465	25.6%
Moloka'i	846	71	31	152	284	324	220	145	51.9%
Lāna'i	499	105	14	173	528	289	267	28	871.7%
Kaua'i	7,191	1,361	332	2,291	4,538	4,685	1,302	2,346	-44.5%
Island of Hawai'i	25,273	6,923	1,215	15,244	26,866	28,160	9,514	10,927	-12.9%

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

## 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 Apr. 2025P	YTD Apr. 2024RP	% Change
Group vs True Independent (Net)									
Group Tour	35,289	NA	801	10,494	18,958	18,143	5,958	8,273	-28.0%
True Independent (Net)	134,413	NA	7,747	73,398	111,919	112,166	37,175	40,153	-7.4%
Leisure vs Business									
Pleasure (Net)	218,691	44,623	8,533	104,308	152,060	145,879	48,455	54,417	-11.0%
MCI (Net)	5,574	840	299	3,915	5,029	5,923	1,407	2,123	-33.7%
Convention/Conf.	3,184	331	110	1,600	2,607	3,522	909	899	1.0%
Corp. Meetings	232	23	86	97	262	245	18	212	-91.7%
Incentive	2,183	487	111	2,242	2,168	2,203	483	1,013	-52.3%

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.

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

## First Timers vs. Repeat Visitors

Korea (by Air)	2019	2020*	2021	2022	2023	2024P	YTD Apr. 2025P	YTD Apr. 2024RP	% Change
First Time Visitors (%)	73.7	NA	49.4	74.8	71.9	68.2	67.7	70.4	-2.7
Repeat Visitors (%)	26.3	NA	50.6	25.2	28.1	31.8	32.3	29.6	2.7

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.

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

## Tax Revenue

Korea (by Air)	2019	2020*	2021	2022	2023	2024P	YTD Apr. 2025P	YTD Apr. 2024RP	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	58.12	NA	4.85	32.89	49.91	47.94	15.30	17.98	-14.9%

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

P=Preliminary data. RP=March and April 2024 preliminary data were revised.