



Korea Fact Sheet

Korea Overview

HTA has contracted with Aviareps to provide marketing services in Korea. Hawai'i Tourism Korea (HTK) aims to grow awareness for the Hawaiian Islands. HTK is focused on sustaining airlift, stimulating travel demand, increasing visitor expenditures, strengthening Hawai'i's presence in online and offline initiatives, and promoting visitation across the Hawaiian Islands.

Year-to-Date December 2019 Quick Facts¹

Visitor Expenditures:	\$477.8 million
Primary Purpose of Stay:	Pleasure (215,295) vs. MCI (5,482)
Average Length of Stay:	7.64 days
First Time Visitors:	73.6%
Repeat Visitors:	26.4%

	2018	2017	% Change 2018 vs 2017	2019 Forecast (Quarter 3 2019)	% Change 2018 vs 2019 Forecast	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
Korea (by Air)								
Visitor Expenditures* (\$ Millions)	496.6	561.3	-11.5%	430.3	-13.4%	477.8	496.6	-3.8%
Visitor Days	1,698,940	2,015,132	-15.7%	1,524,862	-10.2%	1,722,496	1,698,940	1.4%
Arrivals	228,350	279,201	-18.2%	203,405	-10.9%	225,479	228,350	-1.3%
Per Person Per Day Spending* (\$)	292.3	278.5	5.0%	282.2	-3.5%	277.4	292.3	-5.1%
Per Person Per Trip Spending* (\$)	2,174.8	2,010.2	8.2%	2,115.6	-2.7%	2,119.0	2,174.8	-2.6%
Length of Stay (days)	7.44	7.22	3.1%	7.50	0.8%	7.64	7.44	2.7%

**Excludes supplemental business spending*

Contact Information

Hawai'i Tourism Authority: Minami Aoki, Market Manager
Tel: (808) 973-2262
minami.aoki@gohta.net

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

¹ 2019 visitor data are preliminary. January – June 2019 data were updated with immigration statistics from the National Travel and Tourism Office (NTTO). 2018 and 2017R visitor data are the final numbers and reflect updated immigration statistics from NTTO; updated airfare statistics from DIIO Mi Airline database, and final passenger counts for Airline reports.

Market Summary

- In 2018, decreased visitor arrivals (-18.2% to 228,350) contributed to a 11.5 percent decline in visitor expenditures to \$496.6 million. Daily spending (+5.0% to \$292 per person) was higher compared to 2017. In 2019 a drop in visitor arrivals (-1.3% to 225,479 visitors) and lower daily spending (-5.1% to \$277 per person) resulted in a decline in visitor expenditures (-3.8% to \$477.8 million) compared to 2018.
- In 2018, 97.6 percent went to O‘ahu, 13.9 percent went to Maui, 10.6 percent went to the island of Hawai‘i, and 4.0 percent went to Kaua‘i. In 2019, 98.4 percent went to O‘ahu, 12.8 percent went to Maui, 11.1 percent went to the island of Hawai‘i, and 3.1 percent went to Kaua‘i.
- In 2018, 54.3 percent made their own travel arrangements (True Independent). In 2019, 58.8 percent were True Independent travelers.
- In 2018, first timers comprised 78.3 percent and 21.7 percent were repeaters. In 2019, first timers accounted for 73.6 percent, and 26.4 percent were repeat visitors.
- In 2018, seats from Seoul declined (-8.6% to 350,900) compared to 2017. In 2019, air seat capacity from Seoul decreased 7.0 percent from the previous year.

Market Insights

- The South Korean economy grew 0.4 percent in the third quarter of 2019. Korean government announced it was targeting 2.4 percent economic growth for 2020.
- The average USD/WON exchange rate in December was 1172.45 won, a slight increase from the previous rate of 1163.27 won in November. Fuel surcharges were imposed in December up to 69,600 won (\$59.77) for a round trip between Korea and the U.S.
- With a population of over 51 million, Korea Tourism Organization (KTO) reported that the number of Korean outbound travellers in Nov 2019 was 2,090,192, a year-on-year decrease of 9 percent.
- Korean Air is currently operating two regular flights for ICN-HNL routes with KE053 (daily) & KE051 (4-time weekly) and accommodating growing travel demands to Hawai‘i during winter peak season.
- Asiana Airlines decided to extend its daily flight services on the ICN-HNL route to the end of October 2020.
- Korean Air-affiliated budget carrier ‘Jin Air’ is currently suspending its service for Hawai‘i from August 27 until winter season following the decision of Korean to operate additional flights on the same routes.
- HTK continues to promote the individual Hawaiian Islands in efforts to increase island distribution by collaborating with key airline partners, tour operators, media and celebrities and influencers.

Distribution by Island

Korea (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
O'ahu	222,760	274,420	-18.8%	221,949	222,760	-0.4%
Maui County	32,253	48,983	-34.2%	29,078	32,253	-9.8%
Maui	31,753	48,556	-34.6%	28,766	31,753	-9.4%
Moloka'i	788	1,125	-30.0%	819	788	4.1%
Lāna'i	664	913	-27.2%	495	664	-25.5%
Kaua'i	9,165	11,469	-20.1%	7,071	9,165	-22.9%
Island of Hawai'i	24,279	29,610	-18.0%	25,074	24,279	3.3%

Airlift

Departure City	2019					2018					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Seoul	88,217	71,121	84,676	82,384	326,398	109,692	71,967	92,363	76,878	350,900	-19.6	-1.2	-8.3	7.2	-7.0

Source: Diio Mii airline schedules, updated January 10, 2020.

Group vs. True Independent; Leisure vs. Business

Korea (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
Group vs True Independent (Net)						
Group tour	33,724	45,479	-25.8%	34,803	33,724	3.2%
True Independent (Net)	124,023	138,563	-10.5%	132,672	124,023	7.0%
Leisure vs business						
Pleasure (Net)	217,332	267,147	-18.6%	215,295	217,332	-0.9%
MCI (Net)	6,347	7,463	-15.0%	5,482	6,347	-13.6%
Convention/Conf.	3,771	2,961	27.4%	3,155	3,771	-16.3%
Corp. Meetings	416	204	104.0%	228	416	-45.3%
Incentive	2,167	4,484	-51.7%	2,122	2,167	-2.1%

First Timers vs. Repeat Visitors

Korea (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
1st timers (%)	78.3	82.1	-3.8	73.6	78.3	-4.7
Repeaters (%)	21.7	17.9	3.8	26.4	21.7	4.7

Tax Revenue

Korea (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Dec. 2019P	YTD Dec. 2018	% change YTD
State tax revenue generated* (\$ Millions)	57.97	65.51	-11.5%	55.77	57.97	-3.8%

*State government tax revenue generated (direct, indirect, and induced)