



# Korea Fact Sheet

## Korea Overview

Aviareps Marketing Garden Holdings Ltd. is contracted by HTA for brand marketing 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 2021, 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 September 2021 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$27.1 million
Primary Purpose of Stay:	Pleasure (3,760) vs. MCI (206)
Average Length of Stay:	19.83 days
First Time Visitors:	41.3%
Repeat Visitors:	58.7%

Korea (by Air)	2019	2020*	% Change 2020 vs 2019	2021 Annual Forecast <sup>1/</sup>	YTD Sep. 2021	YTD Sep. 2020	% Change YTD
Visitor Expenditures (\$ Millions)	497.9	NA	NA	34.9	27.1	NA	NA
Visitor Days	1,745,666	404,206	-76.8%	141,877	111,007	397,184	-72.1%
Arrivals	229,056	46,884	-79.5%	7,146	5,597	46,540	-88.0%
Average Daily Census	4,783	1,104	-76.9%	389	407	1,450	-71.9%
Per Person Per Day Spending (\$)	285.2	NA	NA	246.0	244.36	NA	NA
Per Person Per Trip Spending (\$)	2,173.7	NA	NA	4,883.8	4,846.7	NA	NA
Length of Stay (days)	7.62	8.62	13.1%	19.86	19.83	8.53	132.4%

NA= Annual 2020 visitor spending statistics and comparative year-to-date 2020 statistics were not available. Due to COVID-19 restrictions, fielding for visitor spending was limited for 2020.

<sup>1/</sup>Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 3, 2021).

## Contact Information

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<sup>1/</sup> 2021 visitor data are preliminary. 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.

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In September 2021, passengers arriving from out-of-state could bypass the State's mandatory 10-day self-quarantine if they were fully vaccinated in the United States or with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner prior to their departure through the Safe Travels program. On August 23, 2021, Hawai'i Governor David Ige urged travelers to curtail non-essential travel until the end of October 2021 due to a surge in Delta variant cases that has overburdened the state's health care facilities and resources. The U.S. Centers for Disease Control and Prevention (CDC) continued to enforce restrictions on cruise ships through a "Conditional Sail Order", a phased approach for the resumption of passenger cruises to mitigate the risk of spreading COVID-19 onboard.

In September 2021, all travelers, including returning Korean nationals, must have a negative PCR test result 72 hours prior to travel, in order to board flights for Korea. Returning Korean nationals who completed full vaccination and tested negative for COVID-19 were exempted from the mandatory 14-day quarantine.

- Through the first nine months of 2021, there were 5,597 visitors from Korea, compared to 46,540 visitors (-88.0%) in the first nine months of 2020, versus 165,690 visitors (-96.6%) in the first nine months of 2019.
- There were 74 scheduled flights and 20,572 seats from Korea during the first nine months of 2021, compared to 234 flights and 71,175 seats in the first nine months of 2020, versus 763 flights and 244,014 seats in the first nine months of 2019.
- For all of 2020, arrivals fell 79.5 percent to 46,884 visitors. Visitor days declined 76.8 percent. The average daily census was 1,104 visitors, a 76.9 percent drop compared to 2019.
- In 2020, 98.4 percent of visitors went to O'ahu, 14.8 percent went to the island of Hawai'i, 10.0 percent went to Maui and 2.9 percent went to Kaua'i.
- In 2020, air capacity from Seoul decreased 77.9 percent from the previous year to 72,287 seats.
- In 2019, visitor spending rose slightly (+0.3%) to \$497.9 million. Visitor arrivals (+0.3% to 229,056 visitors) and visitor days (+2.8%) increased but daily spending (-2.4% to \$285 per person) decreased compared to 2018. The average daily census was 4,783 visitors in 2019, an increase of 2.8 percent compared to 2018.
- In 2019, 98.4 percent of Korean visitors went to O'ahu, 12.8 percent went to Maui, 11.0 percent went to the island of Hawai'i, and 3.1 percent went to Kaua'i. Over half (58.8%) made their own travel arrangements (i.e., True Independent). First timers comprised 73.6 percent and 26.4 percent were repeaters.
- In 2019, seats from Seoul declined (-7.0% to 326,398) compared to 2018.

## Market Conditions

- **Economic Forecast:** The economic growth momentum of Korea remains unscathed with robust exports. The Organization for Economic Cooperation and Development (OECD) raised again its 2021 growth outlook for the Korean economy to 4.0 percent from its May forecast of 3.8 percent.
- **Export:** South Korea's exports have extended their gains to 11 consecutive months in September 2021 and set a record high level by rising 16.7 percent maintaining solid growth. The monthly figure was the highest since South Korea started compiling the data in 1956.
- **Currency:** The average USD/WON exchange rate in September 2021 was 1,170.84 won, slightly depreciated from the previous rate of 1,161.48 won in August.
- **Vaccination:** Korea is expecting to reach its target vaccination rate of 70 percent by end of October 2021 while maintaining the current social distancing rules.
- **Live with COVID-19:** Korea is expected to shift to “Live with COVID-19” from November 2021. Under the new regulations, social distancing rules would be adjusted upon the quarantine situation in late October and switch to a phase for daily recovery system in November.
- **Travel Sentiments:** According to data by Incheon International Airport Corporation based on check-in tickets, a total of 31,545 passengers departed to overseas destinations during the Chuseok holiday from September 17 to 22, nearly doubling from the daily number of departures of last year’s Chuseok holiday.
- **Airlines resuming marketing activities:** As demand for overseas travel and the number of actual overseas travelers increase, Korean airlines are resuming their marketing and sales promotions for international routes.
- **Airlift:** Korean Air will resume 3 weekly flights for ICN-HNL route (KE053) from November 2021. Asiana Airlines is planning to resume ICN-HNL route in January 2022. Hawaiian Airlines is operating three weekly flights (HA 460) from ICN to HNL, every Wednesday, Friday and Sunday.

## Distribution by Island

Korea (by Air)	2019	2020	% Change 2020 vs 2019	YTD Sep. 2021	YTD Sep. 2020	% Change YTD
O'ahu	225,488	46,133	-79.5%	4,990	45,862	-89.1%
Maui County	29,619	4,711	-84.1%	495	4,658	-89.4%
Maui	29,303	4,668	-84.1%	489	4,615	-89.4%
Moloka'i	846	71	-91.6%	4	71	-94.3%
Lāna'i	499	105	-78.9%	9	105	-91.0%
Kaua'i	7,191	1,361	-81.1%	183	1,352	-86.4%
Island of Hawai'i	25,273	6,923	-72.6%	515	6,898	-92.5%

## Airlift: Scheduled Seats

Departure City	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Seoul	3,614	6,950	21,048	23,032	54,644	70,957	218	0	1,112	72,287	-94.9	3088.1	NA	1971.2	-24.4

Source: DBEDT analysis based on scheduled Seats from Diio Mi flight schedules as of October 20, 2021, subject to change.

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

Korea (by Air)	2019	2020*	% Change 2020 vs 2019	YTD Sep. 2021	YTD Sep. 2020	% Change YTD
Group vs True Independent (Net)						
Group tour	35,289	NA	NA	243	NA	NA
True Independent (Net)	134,413	NA	NA	3,968	NA	NA
Leisure vs business						
Pleasure (Net)	218,691	44,623	-79.6%	3,760	44,449	-91.5%
MCI (Net)	5,574	840	-84.9%	206	839	-75.4%
Convention/Conf.	3,184	331	-89.6%	26	331	-92.1%
Corp. Meetings	232	23	-90.2%	79	22	268.5%
Incentive	2,183	487	-77.7%	101	487	-79.3%

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.

## First Timers vs. Repeat Visitors

Korea (by Air)	2019	2020*	% Change 2020 vs 2019	YTD Sep. 2021	YTD Sep. 2020	% Change YTD
1st timers (%)	73.7	NA	NA	41.3	NA	NA
Repeaters (%)	26.3	NA	NA	58.7	NA	NA

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*	% Change 2020 vs 2019	YTD Sep. 2021	YTD Sep. 2020	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	58.12	NA	NA	3.17	NA	NA

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