



# 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 November 2021 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$36.8 million
Primary Purpose of Stay:	Pleasure (6,977) vs. MCI (278)
Average Length of Stay:	15.73 days
First Time Visitors:	51.1%
Repeat Visitors:	48.9%

	2019	2020*	% Change 2020 vs 2019	2021 Annual Forecast <sup>1/</sup>	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
Korea (by Air)	2019	2020*					
Visitor Expenditures (\$ Millions)	497.9	NA	NA	34.9	36.8	NA	NA
Visitor Days	1,745,666	404,206	-76.8%	141,877	146,094	400,507	-63.5%
Arrivals	229,056	46,884	-79.5%	7,146	9,289	46,683	-80.1%
Average Daily Census	4,783	1,104	-76.9%	389	437	1,196	-63.4%
Per Person Per Day Spending (\$)	285.2	NA	NA	246.0	252.10	NA	NA
Per Person Per Trip Spending (\$)	2,173.7	NA	NA	4,883.8	3,965.2	NA	NA
Length of Stay (days)	7.62	8.62	13.1%	19.86	15.73	8.58	83.3%

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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## Market Summary

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In November 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. 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 November 2021, most entrants must quarantine for 14 days upon arrival in Korea. Returning Korean residents can self-quarantine, while nonresidents must quarantine at designated facilities at their own expense. All travelers from high-risk countries must quarantine at government facilities.

- Through the first 11 months of 2021, there were 9,289 visitors from Korea, compared to 46,683 visitors (-80.1%) in the first 11 months of 2020, versus 206,223 visitors (-95.5%) in the first 11 months of 2019.
- There were 112 scheduled flights and 30,416 seats from Korea during the first 11 months of 2021, compared to 235 flights and 71,453 seats in the first 11 months of 2020, versus 930 flights and 296,706 seats in the first 11 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 Organization for Economic Cooperation and Development (OECD) has maintained its outlook on the South Korean economy of a 4 percent growth in gross domestic product for Korea this year while revising down its growth predictions for major countries. The OECD evaluated that the Korean economy continues to recover following the COVID-19 shock, propelled by strong export growth, improving business investment and public support.
- **Export:** In November 2021, Korea's exports advanced for 13 straight months and increased 32.1 percent year-on-year to USD 60.4 billion, the highest number in history. Imports jumped 43.6 percent to \$57.4 billion, resulting in a trade surplus of \$3.1 billion.
- **Currency:** The average USD/WON exchange rate in November 2021 was KRW 1,183.68 won, slightly depreciated compared to the previous rate of 1,181.92 won in October.
- **Vaccination:** South Korea has recorded 80 percent vaccination rate. By late November 2021, over 40 million of the nation's 51.3 million residents had been fully vaccinated.
- **Live with COVID-19:** Korea implemented a new social distancing measure from November 1 lifting restrictions on operating hours for restaurants and coffee shops. Curfews applied for livelihood facilities are lifted and restrictions on restaurant, cafes and bars are also eased to open until 12am allowing private gatherings.
- **Outbound Travel:** According to the Ministry of Land, Infrastructure and Transport, the number of outbound passengers in November was 309,000, up from 291,000 the previous month. Especially, the number of passengers traveling to resorts such as Saipan, where the Travel Bubble was signed, is rapidly increasing.
- **Travel Sentiment:** According to Visa Korea on November 17th, Korean travel consumers' desire for overseas travel is increasing - 3 out of 10 Koreans intend to travel abroad within a year. The percentage of people willing to travel abroad is continuously rising: 27 percent in November 2020 and 26 percent in February 2021, 35 percent in June 2021, and 32 percent in September 2021.
- **Airlift:** Korean Air is operating 3 weekly flights for ICN-HNL route (KE053) and will increase to 5 weekly flights next January. Asiana Airlines is planning to resume ICN-HNL route next year. Hawaiian Airlines is keeping its flight frequency of three weeklies (HA 460) from ICN to HNL.

## Distribution by Island

Korea (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
O'ahu	225,488	46,133	-79.5%	8,456	45,968	-81.6%
Maui County	29,619	4,711	-84.1%	932	4,685	-80.1%
Maui	29,303	4,668	-84.1%	918	4,642	-80.2%
Moloka'i	846	71	-91.6%	12	71	-82.7%
Lāna'i	499	105	-78.9%	13	105	-88.0%
Kaua'i	7,191	1,361	-81.1%	286	1,360	-79.0%
Island of Hawai'i	25,273	6,923	-72.6%	805	6,906	-88.3%

## 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 Nov. 2021	YTD Nov. 2020	% Change YTD
Group vs True Independent (Net)						
Group tour	35,289	NA	NA	540	NA	NA
True Independent (Net)	134,413	NA	NA	6,269	NA	NA
Leisure vs business						
Pleasure (Net)	218,691	44,623	-79.6%	6,977	44,511	-84.3%
MCI (Net)	5,574	840	-84.9%	278	839	-66.8%
Convention/Conf.	3,184	331	-89.6%	41	331	-87.7%
Corp. Meetings	232	23	-90.2%	111	22	414.4%
Incentive	2,183	487	-77.7%	134	487	-72.4%

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 Nov. 2021	YTD Nov. 2020	% Change YTD
1st timers (%)	73.7	NA	NA	51.1	NA	NA
Repeaters (%)	26.3	NA	NA	48.9	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 Nov. 2021	YTD Nov. 2020	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	58.12	NA	NA	4.30	NA	NA

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