



# Korea Fact Sheet

## Korea Overview

Aviareps Marketing Garden Holdings Ltd. is contracted by HTA for Brand Marketing and 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 2022, 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 March 2022 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$24.3 million
Primary Purpose of Stay:	Pleasure (4,484) vs. MCI (431)
Average Length of Stay:	15.24 days
First Time Visitors:	55.7%
Repeat Visitors:	44.3%

Korea (by Air)	2019	2020	2021P	2022 Annual Forecast*	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
Visitor Expenditures (\$ Millions)	497.9	NA	49.1	192.6	24.3	5.2	371.7%
Visitor Days	1,745,666	404,206	183,299	641,680	89,096	21,880	307.2%
Arrivals	229,056	46,884	12,217	80,957	5,846	778	651.1%
Average Daily Census	4,783	1,104	502	1,758	990	243	307.2%
Per Person Per Day Spending (\$)	285.2	NA	267.75	300.1	273.20	235.9	15.8%
Per Person Per Trip Spending (\$)	2,173.7	NA	4,017.3	2,378.5	4,163.9	6,630.2	-37.2%
Length of Stay (days)	7.62	8.62	15.00	7.93	15.24	28.11	-45.8%

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) 2022 annual forecast (Quarter 1, 2022).

## Contact Information

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<sup>1/</sup> 2022 and 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.

## Market Summary

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Prior to the global COVID-19 pandemic and Hawai'i's quarantine requirements for travelers, the State of Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. Due to concerns about the rapid surge of COVID cases worldwide and the limitations of Hawai'i's health care system, on March 17, 2020 Hawai'i Gov. David Ige asked visitors to postpone their trips for at least 30 days. The counties also began issuing stay-at-home orders. On March 26, 2020, the state implemented a 14-day mandatory travel quarantine. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. This continued until mid-October 2020, when the state initiated the Safe Travels program, which allowed trans-Pacific travelers to bypass the quarantine if they had a valid negative test for COVID-19.

Through March 25, 2022, domestic passengers could bypass the State's mandatory five-day self-quarantine if they were up-to-date on their vaccination or with a negative COVID-19 pre-travel test result from a Trusted Testing Partner through the Safe Travels program. The Safe Travels Program ended on March 25, 2022, and domestic pre-travel requirements ceased as of March 26, 2022. Passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included proof of an up-to-date vaccination document and negative COVID-19 test result taken within one day of travel, or documentation of having recovered from COVID-19 in the past 90 days, prior to their flight.

- Through the first quarter of 2022, there were 5,846 visitors from Korea, compared to 63,131 visitors in the first quarter of 2019.
- There were 91 scheduled flights with 25,636 seats in the first quarter of 2022, compared to 271 flights with 88,217 seats in the first quarter of 2019.
- For all of 2021, 12,217 visitors arrived from Korea. In comparison, there were 46,884 visitors (-73.9%) from Korea in 2020, and versus 229,056 visitors (-94.7%) in 2019.
- There were 140 scheduled flights and 39,160 seats from Korea in 2021, compared to 238 flights and 72,287 seats in 2020, and 1,027 flights and 326,398 seats in 2019.

## Market Conditions

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- Korea's exports grew for a 17th straight month in March 2022, but expanded at a slower pace in with its trade balance swinging to a deficit as imports surged amid soaring energy prices. Exports in March expanded 18.2 percent from a year earlier to \$63.48 billion, beating expectations for a 15.9 percent rise from a Wall Street Journal poll of seven economists.
- the average USD/WON exchange rate in March 2022 was KRW 1,221.74, slightly depreciated compared to the previous rate of 1,187.83 in February 2022.
- Korea has recorded 86.6 percent vaccination rate and 63.7 percent booster rate as of March 31, 2022. From March 31, Korea started vaccinating children between the ages of 5 and 11. A total of 3,068,726 children are eligible for vaccination.
- Korean government relaxed its business curfew from 10 pm to 11 pm by one hour effective March 4.

- Advisory to avoid non-essential trips abroad has been extended to April 13, 2022. The Ministry of Foreign Affairs is planning to update the special travel advisory to the usual travel warning system for each country in April.
- According to Interpark and Timon, inquiries about overseas travel increased rapidly after the announcement of the lifting of quarantine upon entry. Travel agencies rapidly started sales promotions. TV home shopping and T-commerce channels have already started selling overseas travel products including Hawai'i package tours.
- A recent survey showed that 55 percent Koreans had looked into overseas travel products after the government's announcement of quarantine exemption for international arrivals. 40 percent of respondents selected the second half of this year as the time when they would travel abroad. As for the preferred concept of overseas travel, 'beach resorts' showed a high preference of 37 percent, followed by 'big city tours' at 24 percent and 'small city tours' at 19 percent. As for the type of companion, 'family' was the highest (53%). The trip length preferred was '5-6 days' (38%) and 'one week or more' (30%). (Source: Timon, March 22-29, 530 respondents)
- Airlift: Korean Air is operating 3 weekly flights. Korean Air is planning 5 weekly flights for May 2022 and considering daily flights for July. Asiana Airlines resumed operations on April 3, 2022 with 3 times flights per week. Hawaiian Airlines increased to 4 weekly flights from March 27, 2022.

## Distribution by Island

Korea (by Air)	2019	2020	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
O'ahu	225,488	46,133	11,196	5,507	658	737.1%
Maui County	29,619	4,711	1,387	868	79	1002.2%
Maui	29,303	4,668	1,352	861	74	1056.3%
Moloka'i	846	71	36	23	0	NA
Lāna'i	499	105	14	24	4	468.0%
Kaua'i	7,191	1,361	342	277	25	989.4%
Island of Hawai'i	25,273	6,923	1,372	1,096	95	1047.8%

## Airlift: Scheduled Seats and Flights

Scheduled seats	2022					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Seoul	25,636	51,205	78,414	93,538	248,793	3,614	6,950	10,008	18,588	39,160	609.4	636.8	683.5	403.2	535.3

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules as of April 26, 2022, subject to change.

Scheduled flights	2022					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
Seoul	91	163	245	313	812	13	25	36	66	140	600.0	552.0	580.6	374.2	480.0

Source: DBEDT analysis based on scheduled flights from Diio Mi flight schedules as of April 26, 2022, subject to change.

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

Korea (by Air)	2019	2020*	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
Group vs True Independent (Net)						
Group tour	35,289	NA	817	360	7	5431.9%
True Independent (Net)	134,413	NA	8,262	4,248	737	476.8%
Leisure vs business						
Pleasure (Net)	218,691	44,623	9,586	4,484	418	973.9%
MCI (Net)	5,574	840	386	431	26	1544.0%
Convention/Conf.	3,184	331	128	287	4	6837.5%
Corp. Meetings	232	23	111	6	17	-63.4%
Incentive	2,183	487	155	158	5	2983.0%

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*	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
1st timers (%)	73.7	NA	54.1	55.7	17.6	38.1
Repeaters (%)	26.3	NA	45.9	44.3	82.4	-38.1

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*	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	58.12	NA	5.73	2.82	0.60	368.7%

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