



# 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 June 2022 Quick Facts<sup>1/</sup>

Visitor Expenditures:	\$91.2 million
Primary Purpose of Stay:	Pleasure (29,380) vs. MCI (2,186)
Average Length of Stay:	9.42 days
First Time Visitors:	72.2%
Repeat Visitors:	27.8%

Korea (by Air)	2019	2020	2021P	2022 Annual Forecast*	YTD June 2022P	YTD June 2021P	% Change YTD
Visitor Expenditures (\$ Millions)	497.9	NA	49.1	192.6	91.2	14.1	548.2%
Visitor Days	1,745,666	404,206	183,299	641,680	313,307	56,161	457.9%
Arrivals	229,056	46,884	12,217	80,957	33,265	2,429	1269.5%
Average Daily Census	4,783	1,104	502	1,758	1,731	310	457.9%
Per Person Per Day Spending (\$)	285.2	NA	267.75	300.1	291.19	250.6	16.2%
Per Person Per Trip Spending (\$)	2,173.7	NA	4,017.3	2,378.5	2,742.6	5,794.1	-52.7%
Length of Stay (days)	7.62	8.62	15.00	7.93	9.42	23.12	-59.3%

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, Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. On March 26, 2020, the state implemented mandatory quarantine and travel restrictions. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. In October 2020, the state initiated the Safe Travels program, which allowed travelers to bypass quarantine if they had a valid negative COVID test. Through March 25, 2022, domestic passengers could bypass the state's mandatory self-quarantine if they were vaccinated or have a negative COVID pre-travel test. The Safe Travels Program ended on March 26, 2022. In June 2022, passengers arriving on direct international flights through June 11 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. This requirement was lifted on June 12, 2022. There were no travel restrictions for passengers arriving to Hawai'i on domestic direct flights from the U.S. Mainland.

- Through the first half of 2022, there were 33,265 visitors from Korea, compared to 110,597 visitors in the first half of 2019.
- There were 243 scheduled flights with 73,771 seats in the first half of 2022, compared to 498 flights with 159,338 seats in the first half 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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- From June 1, 2022, the number of tests for inbound travelers are reduced from three to two, once before entry and once after entry. Previously, people needed to take the test once before entry and twice after entry. PCR test, which needed to be done on the day of entry, is required now within three days after entering South Korea.
- From June 8, 2022, quarantine obligations for all overseas arrivals, regardless of whether they have been vaccinated against COVID-19, have been lifted. Previously, only those who had completed the COVID-19 vaccination were exempted from quarantine, and those who were not vaccinated had to isolate for 7 days.
- South Korea's exports rose 5.4 percent to US\$57.73 billion in June 2022. In the first half of this year, exports grew 15.6 percent to \$35.03 billion, the highest figure ever.
- In June 2022, the South Korean exchange rate was 1,281.95 (KRW/USD), slightly depreciated from the last month.
- Korea recorded 86.9 percent vaccination rate and 65.0 percent booster rate as of June 30, 2022.
- From June 1, 2022, unvaccinated children under the age of 12 are exempted from quarantine. Previously, unvaccinated children were exempted from quarantine only when entering the country with their inoculated parents if they were under the age of six.

- Korea's remaining measures consist of indoor masks and 7-day quarantine of confirmed patients.
- Hotels.com survey of overseas travel showed, that 86 percent of Korean travelers said they would like to travel abroad within three months.
- For June-September 2022, the search volume for overseas travel increased by 566 percent compared to the same period last year. Also, 38 percent of Korean tourists said they had plans to travel more within these three months.
- Reservations within 15 to 60 days are increasing. Booking lead times, which shortened due to the pandemic, are getting longer again as uncertainty decreases.
- There was a high preference for high-end accommodations with clean and well-equipped facilities. Hotels.com's search volume for each hotel accommodation class was 4-5 stars (56%), 3-3.5-stars (34%), and 1-2.5-stars (10%).
- Airlift: Korean Air operated 5 weekly flights and will increase the frequency to daily flights in July 2022. Asiana Airlines operated 3 weekly flights and will increase the frequency to 5 weekly in July 2022. Hawaiian Airlines increased service to 5 flights a week during June and July 2022 from 4 times a week in May.

## Distribution by Island

Korea (by Air)	2019	2020	2021P	YTD June 2022P	YTD June 2021P	% Change YTD
O'ahu	225,488	46,133	11,196	32,382	2,113	1432.6%
Maui County	29,619	4,711	1,387	3,256	249	1208.0%
Maui	29,303	4,668	1,352	3,230	243	1231.5%
Moloka'i	846	71	36	54	2	2463.0%
Lāna'i	499	105	14	64	8	664.2%
Kaua'i	7,191	1,361	342	737	93	692.4%
Island of Hawai'i	25,273	6,923	1,372	4,152	275	1407.2%

## 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	48,135	70,482	91,138	235,391	3,614	6,950	10,008	18,588	39,160	609.4	592.6	604.3	390.3	501.1

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules as of June 24, 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	152	219	305	767	13	25	36	66	140	600.0	508.0	508.3	362.1	447.9

Source: DBEDT analysis based on scheduled flights from Diio Mi flight schedules as of June 24, 2022, subject to change.

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

Korea (by Air)	2019	2020*	2021P	YTD June 2022P	YTD June 2021P	% Change YTD
Group vs True Independent (Net)						
Group tour	35,289	NA	817	3,896	20	19211.3%
True Independent (Net)	134,413	NA	8,262	21,038	2,181	864.6%
Leisure vs business						
Pleasure (Net)	218,691	44,623	9,586	29,380	1,527	1824.6%
MCI (Net)	5,574	840	386	2,186	69	3049.2%
Convention/Conf.	3,184	331	128	1,161	6	18569.0%
Corp. Meetings	232	23	111	28	28	0.3%
Incentive	2,183	487	155	1,018	35	2794.2%

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 June 2022P	YTD June 2021P	% Change YTD
1st timers (%)	73.7	NA	54.1	72.2	30.2	42.0
Repeaters (%)	26.3	NA	45.9	27.8	69.8	-42.0

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.

## Tax Revenue

Korea (by Air)	2019	2020*	2021P	YTD June 2022P	YTD June 2021P	% Change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	58.12	NA	5.73	10.58	1.64	544.2%

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