



# Korea Fact Sheet

## Korea Overview

Korea is the second-largest Asian market for Hawai'i, with the Seoul Metropolitan Area and Busan-Gyeongnam Area serving as the primary source markets. Strengthening Hawai'i's appeal as a preferred destination for Korean travelers remains a strategic priority. Positioning Hawai'i as a multi-island destination offering rich cultural experiences, outdoor adventure, romance, and sports aligns well with Korean travelers' growing desire for mindful and immersive travel experiences.

## Year-to-Date June 2026 Quick Facts<sup>1/</sup>

|                          |                                   |
|--------------------------|-----------------------------------|
| Visitor Expenditures:    | \$ 191.8 million                  |
| Primary Purpose of Stay: | Pleasure (69,262) vs. MCI (2,682) |
| Average Length of Stay:  | 8.28 days                         |
| First Time Visitors:     | 70.9%                             |
| Repeat Visitors:         | 29.1%                             |

|                                    | 2020    | 2021    | 2022    | 2023      | 2024      | 2025P     | 2026 Annual Forecast* | YTD June 2026P | YTD June. 2025P | % Change |
|------------------------------------|---------|---------|---------|-----------|-----------|-----------|-----------------------|----------------|-----------------|----------|
| Korea (by Air)                     |         |         |         |           |           |           |                       |                |                 |          |
| Visitor Expenditures (\$ Millions) | NA      | 41.6    | 283.5   | 430.3     | 399.7     | 426.3     | 445.7                 | 191.8          | 195.5           | -1.9%    |
| Visitor Days                       | 404,206 | 149,496 | 967,259 | 1,362,397 | 1,254,644 | 1,327,291 | 1,367,326             | 610,850        | 619,505         | -1.4%    |
| Arrivals                           | 46,884  | 10,652  | 111,863 | 161,706   | 150,455   | 163,510   | 168,415               | 73,763         | 75,015          | -1.7%    |
| Average Daily Census               | 1,104   | 410     | 2,650   | 3,733     | 3,428     | 3,636     | 3,746                 | 3,375          | 3,423           | -1.4%    |
| Per Person Per Day Spending (\$)   | NA      | 278.0   | 293.1   | 315.8     | 318.5     | 321.2     | 326.0                 | 314.1          | 315.6           | -0.5%    |
| Per Person Per Trip Spending (\$)  | NA      | 3,901.5 | 2,534.7 | 2,660.9   | 2,656.4   | 2,607.1   | 2,646.6               | 2,600.9        | 02,606.5        | -0.2%    |
| Length of Stay (days)              | 8.62    | 14.03   | 8.65    | 8.43      | 8.34      | 8.12      | 8.12                  | 8.28           | 8.26            | 0.3%     |

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) 2026 annual forecast (Quarter 1, 2026).

## Contact Information

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<sup>1/</sup> 2026P and 2025P visitor data are preliminary. 2020 – 2024 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, APIS I-94 data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

## Market Summary

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- In the first half of 2026, 73,763 visitors arrived from Korea by air service, total visitor spending was \$191.8 million and daily visitor spending was \$314 per person. In the first half of 2025, 75,015 visitors arrived from Korea by air, total visitor spending was \$195.5 million and daily visitor spending was \$316 per person.
- There were 422 scheduled flights with 134,098 seats from Seoul in the first half of 2026, compared to 426 flights with 129,578 seats in the first half of 2025.
- In 2025, 163,510 visitors arrived from Korea by air service, total visitor spending was \$426.3 million and daily visitor spending was \$321 per person.
- In 2025, there were 1,045 scheduled flights with 320,579 seats from Seoul.

## Market Conditions (Updated Quarterly)

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- Exports reached \$102.25 billion in June 2026, a 53.4 percent jump from May 2026, driven largely by semiconductor shipments.
- The Korean won weakened, averaging KRW 1,533.01 per U.S. dollar in June 2026, increasing costs for U.S.-bound travelers.
- 2.34 million Koreans traveled overseas in May 2026, down 2.1 percent year-over-year. Cumulative outbound travel through May 2026 reached 12.96 million, up 3.6 percent from the same period in 2025.
- Hawai'i airlift is shifting during the summer peak. Asiana Airlines will temporarily suspend its five-times-weekly Incheon-Honolulu service from July 1, 2026, through October 24, 2026, due to aircraft engine parts supply constraints. To maintain route capacity, Korean Air will add five weekly flights during the same period, helping maintain overall route capacity and minimize disruption to summer travel.
- Fuel surcharges began lowering - Korean Air's one-way surcharge declined approximately 24 percent from \$184 to \$140 month-over-month, while Air Premia's fell nearly 30 percent from \$187 to \$130.
- Competition for Korea's premium long-haul and island travelers is increasing. Seychelles and Sri Lanka are expanding trade and consumer outreach in Korea, emphasizing premium resorts, culture, wellness and island experiences. Sri Lanka has also waived ETA fees for Korean travelers, lowering barriers to visitation.
- Digital tools are increasingly shaping trip planning, with 32 percent of Korean Millennials and Gen Z using AI for travel assistance. However, travelers continue to place greater trust in online travel communities and platform reviews when making final booking decisions

## Distribution by Island

| Korea (by Air)    | 2020   | 2021  | 2022    | 2023    | 2024    | 2025P   | YTD June 2026P | YTD June. 2025P | % Change |
|-------------------|--------|-------|---------|---------|---------|---------|----------------|-----------------|----------|
| O'ahu             | 46,133 | 9,678 | 109,509 | 159,755 | 147,628 | 161,056 | 72,659         | 73,691          | -1.4%    |
| Maui County       | 4,711  | 1,299 | 11,035  | 10,933  | 7,304   | 11,619  | N/A            | 5,024           | N/A      |
| Maui              | 4,668  | 1,268 | 10,953  | 10,518  | 6,840   | 11,033  | 6,622          | 4,735           | 39.9%    |
| Moloka'i          | 71     | 31    | 152     | 284     | 343     | 708     | N/A            | 239             | N/A      |
| Lāna'i            | 105    | 14    | 173     | 528     | 273     | 432     | N/A            | 332             | N/A      |
| Kaua'i            | 1,361  | 332   | 2,291   | 4,538   | 4,528   | 3,561   | 1,455          | 1,814           | -19.8%   |
| Island of Hawai'i | 6,923  | 1,215 | 15,244  | 26,866  | 27,482  | 27,067  | 13,241         | 13,562          | -2.4%    |

P=Preliminary data.

N/A=Due to limited data, Moloka'i and Lāna'i statistics are not available.

## Airlift: Scheduled Seats and Flights

| Scheduled Seats | Quarter 1 2026 | Quarter 2 2026 | Quarter 3 2026 | Quarter 4 2026 | Annual 2026 | Quarter 1 2025 | Quarter 2 2025 | Quarter 3 2025 | Quarter 4 2025 | Annual 2025 | % Change Quarter 1 | % Change Quarter 2 | % Change Quarter 3 | % Change Quarter 4 | % Change 2026 vs. 2025 |
|-----------------|----------------|----------------|----------------|----------------|-------------|----------------|----------------|----------------|----------------|-------------|--------------------|--------------------|--------------------|--------------------|------------------------|
| Seoul           | 76,611         | 78,741         | 79,590         | 69,218         | 304,160     | 66,376         | 69,601         | 89,038         | 95,564         | 320,579     | 15.4               | 13.1               | -10.6              | -27.6              | -5.1                   |

| Scheduled Flights | Quarter 1 2026 | Quarter 2 2026 | Quarter 3 2026 | Quarter 4 2026 | Annual 2026 | Quarter 1 2025 | Quarter 2 2025 | Quarter 3 2025 | Quarter 4 2025 | Annual 2025 | % Change Quarter 1 | % Change Quarter 2 | % Change Quarter 3 | % Change Quarter 4 | % Change 2026 vs. 2025 |
|-------------------|----------------|----------------|----------------|----------------|-------------|----------------|----------------|----------------|----------------|-------------|--------------------|--------------------|--------------------|--------------------|------------------------|
| Seoul             | 242            | 247            | 250            | 218            | 957         | 220            | 229            | 292            | 304            | 1,045       | 10.0               | 7.9                | -14.4              | -28.3              | -8.4                   |

Source: DBEDT analysis based on scheduled flights and seats from Diio Mi flight schedules as of February 23, 2026, subject to change.

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

| Korea (by Air)                  | 2020*  | 2021  | 2022    | 2023    | 2024    | 2025P   | YTD June 2026P | YTD June. 2025P | % Change |
|---------------------------------|--------|-------|---------|---------|---------|---------|----------------|-----------------|----------|
| Group vs True Independent (Net) |        |       |         |         |         |         |                |                 |          |
| Group Tour                      | N/A    | 801   | 10,494  | 18,958  | 17,600  | 17,681  | 8,771          | 8,510           | 3.1%     |
| True Independent (Net)          | N/A    | 7,747 | 73,398  | 111,919 | 108,202 | 119,326 | 53,850         | 54,558          | -1.3%    |
| Leisure vs Business             |        |       |         |         |         |         |                |                 |          |
| Pleasure (Net)                  | 44,623 | 8,533 | 104,308 | 152,060 | 141,043 | 151,981 | 69,262         | 70,014          | -1.1%    |
| MCI (Net)                       | 840    | 299   | 3,915   | 5,029   | 5,668   | 6,610   | 2,682          | 2,924           | -8.3%    |
| Convention/Conf.                | 331    | 110   | 1,600   | 2,607   | 3,447   | 4,100   | 1,846          | 1,632           | 13.1%    |
| Corp. Meetings                  | 23     | 86    | 97      | 262     | 245     | 56      | 102            | 44              | 132.7%   |
| Incentive                       | 487    | 111   | 2,242   | 2,168   | 2,024   | 2,493   | 849            | 1,258           | -32.5%   |

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.

P=Preliminary data.

## First Timers vs. Repeat Visitors

| Korea (by Air)          | 2020* | 2021 | 2022 | 2023 | 2024 | 2025P | YTD June 2026P | YTD June. 2025P | % Change |
|-------------------------|-------|------|------|------|------|-------|----------------|-----------------|----------|
| First Time Visitors (%) | N/A   | 49.4 | 74.8 | 71.9 | 68.3 | 66.4  | 70.9           | 68.0            | 2.9      |
| Repeat Visitors (%)     | N/A   | 50.6 | 25.2 | 28.1 | 31.7 | 33.6  | 29.1           | 32.0            | -2.9     |

N/A = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

P=Preliminary data.

## Tax Revenue

| Korea (by Air)                            | 2020* | 2021 | 2022  | 2023  | 2024  | 2025P | YTD June 2026P 3/ | YTD June 2025P | % Change |
|-------------------------------------------|-------|------|-------|-------|-------|-------|-------------------|----------------|----------|
| State tax revenue generated (\$ Millions) | N/A   | 4.85 | 32.89 | 49.91 | 55.90 | 59.62 | 26.83             | 27.35          | -1.9%    |

\*State government tax revenue generated (direct, indirect, and induced) for 2024, 2025P; year-to-date 2025P and year-to-date 2026P were calculated using the new Hawai'i Tourism Input-Output model (October 2025) and are not directly comparable to previous years' calculations.