



# Korea Fact Sheet

## Korea Overview

Hawai'i Tourism Korea (HTK) prioritizes high-value visitors who seek meaningful, premium and romantic travel experiences. Through integrated marketing campaigns, consumer engagement, and strategic travel trade partnerships, HTK positions Hawai'i as a unique cultural destination. Major initiatives include the "All Ways Hawai'i" campaign, which highlights the islands' diverse, multi-island experiences, and the "Your One & Only Hawai'i" campaign, which positions Hawai'i as a premier choice for affluent and honeymoon travelers. HTK also prioritizes strategic partnerships with airlines to enhance direct air connectivity.

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

Visitor Expenditures:	\$ 83.2 million
Primary Purpose of Stay:	Pleasure (30,591) vs. MCI (349)
Average Length of Stay:	8.58 days
First Time Visitors:	69.6%
Repeat Visitors:	30.4%

Korea (by Air)	2020	2021	2022	2023	2024	2025P	2026 Annual Forecast*	YTD Feb. 2026P 2/	YTD Feb. 2025P	% Change
Visitor Expenditures (\$ Millions)	NA	41.6	283.5	430.3	399.7	426.3	445.7	83.2	73.4	13.3%
Visitor Days	404,206	149,496	967,259	1,362,397	1,254,644	1,327,291	1,367,326	271,813	236,474	14.9%
Arrivals	46,884	10,652	111,863	161,706	150,455	163,510	168,415	31,686	27,023	17.3%
Average Daily Census	1,104	410	2,650	3,733	3,428	3,636	3,746	4,607	4,008	14.9%
Per Person Per Day Spending (\$)	NA	278.0	293.1	315.8	318.5	321.2	326.0	305.9	310.2	-1.4%
Per Person Per Trip Spending (\$)	NA	3,901.5	2,534.7	2,660.9	2,656.4	2,607.1	2,646.6	2,624.2	2,714.8	-3.3%
Length of Stay (days)	8.62	14.03	8.65	8.43	8.34	8.12	8.12	8.58	8.75	-2.0%

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.

<sup>2/</sup> Due to limited data, Moloka'i and Lāna'i visitor statistics were not reported for February 2026. Total arrivals statewide, arrivals to O'ahu, Maui, Kaua'i and Hawai'i Island and arrivals by visitor markets were not affected. Year-to-Date 2026 Visitor spending, visitor days, length of stay and average daily census data did not include those who visited Moloka'i and Lāna'i.

## Market Summary

- In the first two months of 2026, 31,686 visitors arrived from Korea by air service, total visitor spending was \$83.2 million and daily visitor spending was \$306 per person. In the first two months of 2025, 27,023 visitors arrived from Korea by air, total visitor spending was \$73.4 million and daily visitor spending was \$310 per person.
- There were 153 scheduled flights with 48,409 seats from Seoul in the first two months of 2026, compared to 143 flights with 43,497 seats in the first two months 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)

- Korea's exports totaled US\$65.85 billion in January 2026, up 33.9 percent year over year and the highest January level on record.
- The average exchange rate in January 2026 was KRW 1,458.19 per USD, slightly appreciating from KRW 1,467.35 in December 2025.
- Outbound travel continues to recover steadily. December 2025 departures reached 2.75 million (+1.1% YoY), while full-year 2025 departures totaled 29.55 million, exceeding 2019 levels (102.9%).
- In 2026, outbound travel is expected to grow gradually rather than rebound sharply, constrained by a weak currency and persistent inflation. Demand remains resilient but is shifting toward shorter, value-focused trips or premium, experience-driven travel.
- There is rising interest in nature and slower travel, with 65 percent considering mountain destinations. Multi-generational travel remains prominent (46%), while local immersion is increasing, with 42 percent planning visits to local food markets. Social and culture-led experiences are also notable, including meeting new people (38%) and visiting libraries or bookstores (31%). Experience-focused elements such as beauty activities (30%) and accommodation-as-destination stays (25%) are gaining traction.
- "Reset-style" travel—emphasizing fewer activities, low-stimulation environments, and restorative experiences—is emerging as a key 2026 trend, reflecting a shift from itinerary-driven travel toward mental and physical well-being.

## Distribution by Island

Korea (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P 2/	YTD Feb. 2025P	% Change
O'ahu	46,133	9,678	109,509	159,755	147,628	161,056	31,117	26,358	18.1%
Maui County	4,711	1,299	11,035	10,933	7,304	11,619	2,394	1,770	35.3%
Maui	4,668	1,268	10,953	10,518	6,840	11,033	2,394	1,606	49.1%
Moloka'i	71	31	152	284	343	708	28	47	-40.6%
Lāna'i	105	14	173	528	273	432	0	201	-100.0%
Kaua'i	1,361	332	2,291	4,538	4,528	3,561	853	1,078	-20.9%
Island of Hawai'i	6,923	1,215	15,244	26,866	27,482	27,067	6,579	5,972	10.2%

P=Preliminary data.

## 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 Feb. 2026P	YTD Feb. 2025P	% Change
Group vs True Independent (Net)									
Group Tour	NA	801	10,494	18,958	17,600	17,681	3,858	2,599	48.5%
True Independent (Net)	NA	7,747	73,398	111,919	108,202	119,326	23,195	21,099	9.9%
Leisure vs Business									
Pleasure (Net)	44,623	8,533	104,308	152,060	141,043	151,981	30,591	25,475	20.1%
MCI (Net)	840	299	3,915	5,029	5,668	6,610	349	700	-50.2%
Convention/Conf.	331	110	1,600	2,607	3,447	4,100	226	455	-50.2%
Corp. Meetings	23	86	97	262	245	56	0	13	-100.0%
Incentive	487	111	2,242	2,168	2,024	2,493	123	232	-47.2%

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.

P=Preliminary data.

## First Timers vs. Repeat Visitors

Korea (by Air)	2020*	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
First Time Visitors (%)	NA	49.4	74.8	71.9	68.3	66.4	69.6	64.6	4.9
Repeat Visitors (%)	NA	50.6	25.2	28.1	31.7	33.6	30.4	35.4	-4.9

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.

## Tax Revenue

Korea (by Air)	2020*	2021	2022	2023	2024	2025P	YTD Feb. 2026P 3/	YTD Feb. 2025P	% Change
State tax revenue generated (\$ Millions)	NA	4.85	32.89	49.91	55.90	59.62	11.63	10.26	13.3%

<sup>3</sup>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.