

HAWAII TOURISM™

KOREA



2024 HTA Spring Tourism Update

3.6.2024

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Korea Country Director

Irene Lee
Country Director



Jin Jang
Account Director



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HAWAI'I TOURISM KOREA TEAM

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Trade Marketing Manager



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GENERAL ECONOMY



Population

51.7M
Jan 2024

Fuel Surcharge

\$157 (19%↓)
Feb 2024

GDP

2.2%
2024

Unemployment Rate

3.3%
Dec 2023

Inflation Rate

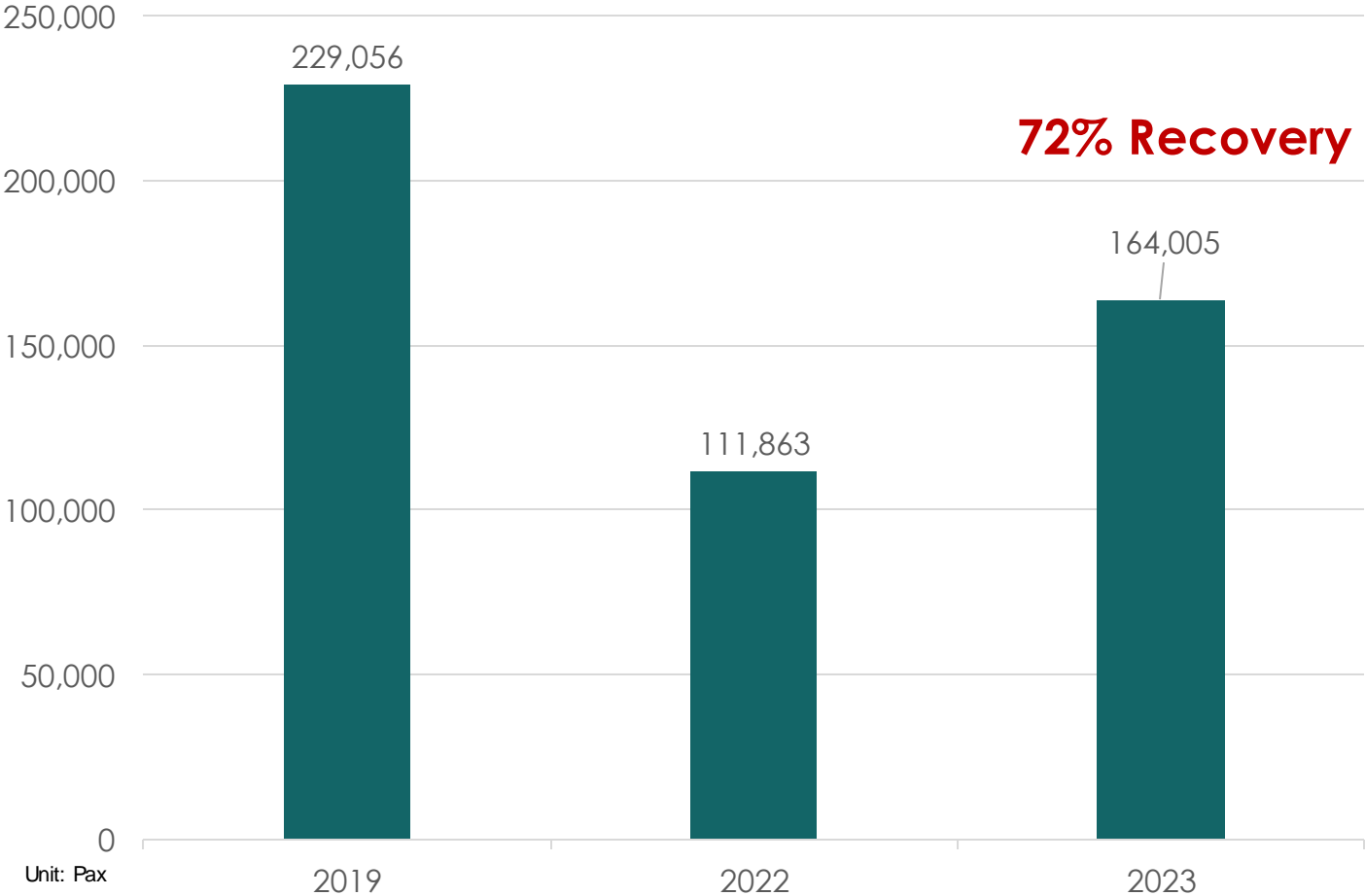
2.3%↓
Forecast in 2024

1 USD = KRW

~~₩~~1,333.50
1 Feb 2024

KOREAN TRAVEL STATS

No. of Korean Visitors to Hawai'i



Visitor Expenditures (\$ M)

\$497.9M (2019)
\$283.5M (2022)
\$436.7M (2023)

**2019 to 2023:
88% Recovered**

Per Person Per Day Spending (\$)

\$285.2 (2019)
\$293.1 (2022)
\$316.1 (2023)

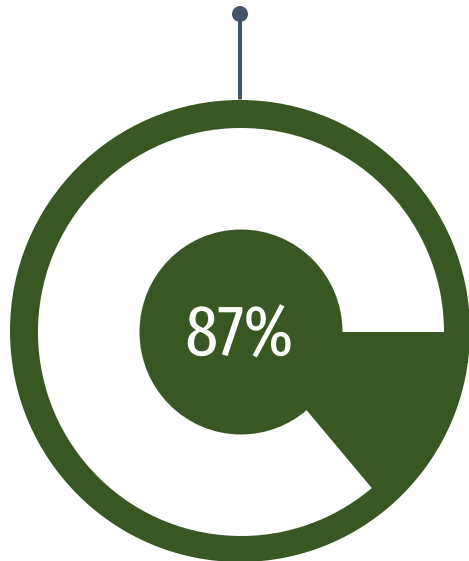
**2019 to 2023:
10.8% ↑**

TRAVEL TRENDS



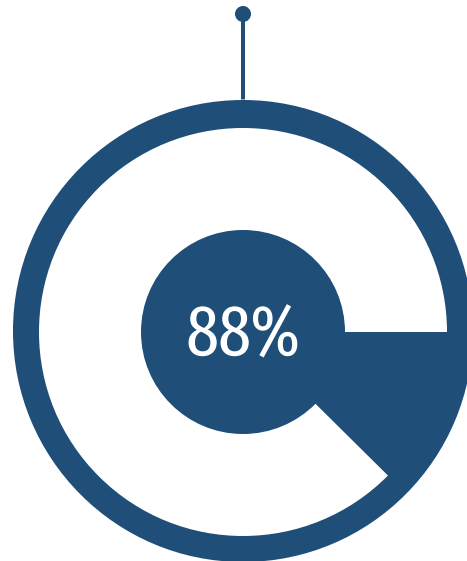
Foodie Tour

Plan to travel for local food



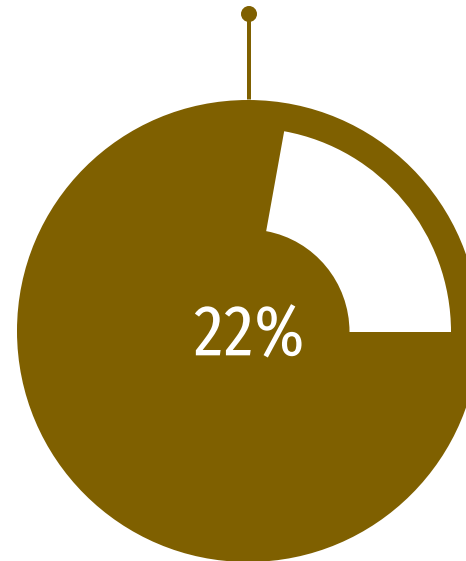
TV-inspired travel

A desire to visit locations they've seen in movies, TV shows, or series



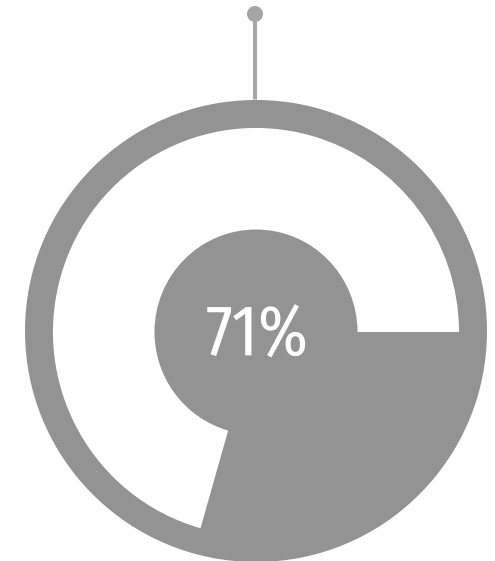
Small Luxury

Prefer to spend a little more and travel leisurely







Celebration Trip

Have taken trips for anniversary celebrations



AIR SEAT SYNOPSIS

Current Flight Operations as of February 2024:

Airlines	Frequency	Seats (Aircraft)
 KOREAN AIR	7 weekly	368
 ASIANA AIRLINES	5 weekly	300
 HAWAIIAN AIRLINES	5 weekly	278
 QIR PREMIA	4 weekly (Dec 31, 2023 - Mar 4, 2024)	309

Total Air Seats & Flights from Korea:

Year	Total Air Seats From Korea	Total Flights From Korea
2019	326,398	1,027
2022	217,245	689
2023	278,670	906
2022 vs 2023 % Increase	22%	24%
2019 vs 2023 % Recovery	86%	89%

AIR SEATS OUTLOOK

Korean Air Merger Update



Korean Air wins EU antitrust approval for Asiana merger



Korean Air now has the approval of 13 out of the 14 countries



T'way Air to start operating flights to 4 European routes



Korean Air proposes transferring five USA routes (HNL, SFO, NYC, LAX, SEA) to Air Premia



Air Premia's Flight to Hawai'i



- **FACT:** Air Premia is a leading candidate to acquire US routes, including Hawai'i, through the Korean Air merger.
- **WEAKNESS:** With only five aircraft, Air Premia faces limitations in capacity on US routes.
- **REMEDY:** Korean Air plans to assist by providing aircraft and pilot resources to mitigate these constraints.

COMPETITIVE LANDSCAPE



**Charter flights for long-haul destinations
(Greece - Norway - Georgia)**



**Popular short-haul destinations during
Lunar New Year holidays
(Japan - Vietnam - Thailand)**



2024 MARKETING STRATEGY

TARGET AUDIENCE

Mindful Korean travelers with household incomes of \$70,000+ and with double income of over \$100,000 will be targeted in Seoul and Busan.



Mainstreamers

Age 40s – 60s

- Family-oriented vacation
- Emphasis on safety
- Interested in eco-tourism/Responsible travel



Sweethearts

Age 20s – 40s

- Newlyweds
- Honeymooners
- Couples
- Romance



Wellness Seekers

Age 30s – 60s

- Interested in physical and mental well-being
- Sustainability
- Relaxation



High-value Travelers

Age 40s – 60s

- High purchasing power
- Prefer a luxury, exclusive, premium
- Prioritize comfort, quality

BRANDING MESSAGE



Mālama Hawai'i

Overarching Message

Inspiring Korean visitors to engage in meaningful experiences during their trips and future stays in Hawai'i.



Mālama Maui

Focus Message

Emphasizing the accessibility of Maui and promoting respectful travel to support the well-being of its community.



My True Aloha

Sub-Message

Introducing authentic Hawai'i culture and beauty to mindful travelers, through a variety of travel experiences where Korean consumers can personally relate to.

MARKETING STRATEGY

TRAVEL TRADE

- Collaborate with airlines to increase airlift to HNL and to further expand to KOA
- Conduct co-ops with travel agencies to align with the Mālama Hawai'i initiatives
- Organize trade FAMs to gain deeper insights into Hawai'i
- Host travel mission to engage Korean agents, boost destination brand awareness, and drive product sales

PR & CONSUMER

- Implement an advertising plan through diverse channels to showcase the branding of the Hawaiian islands
- Execute media programs, partnerships, and collaborations with relevant media to enhance visibility, promote Hawai'i travel, and highlight its culture, history, and regenerative initiatives
- Conduct a #MyTrueAloha campaign which aims to share visitors' unique travel stories in Hawai'i and introduce the Hawai'i lifestyle
- Continuously promote and feature festivals and events information to consumers through social media to encourage their participation

A person is sitting on a rocky mountain peak, looking out over a vast valley filled with clouds. The sky is a mix of blue and orange, suggesting a sunset or sunrise. The text "2024 MARKETING IMPLEMENTATION" is overlaid in large, white, bold letters. A horizontal white line is positioned below the text.

2024 MARKETING IMPLEMENTATION

MAJOR PROGRAMS

Mālama Hawai'i Branding Campaign

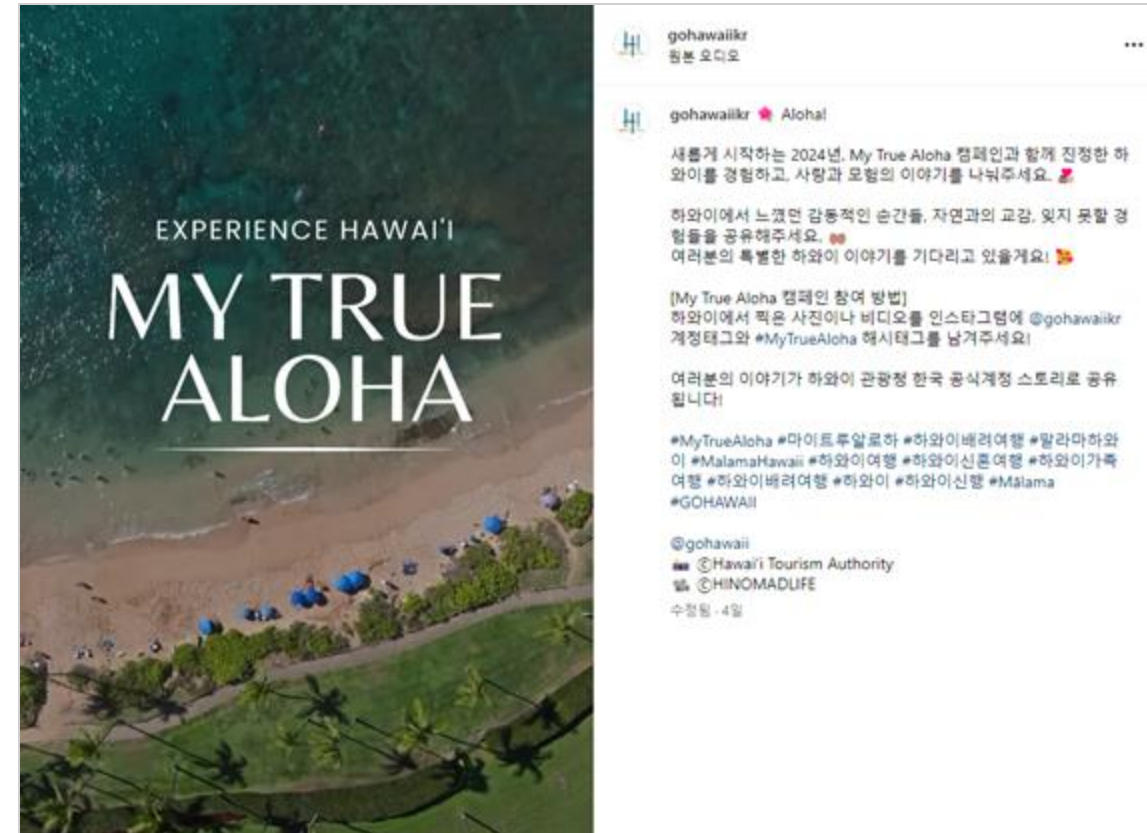
- **Timeline:** January – December
- **Program Components:**
 - ✓ Co-op ad campaign with credit card partners
 - ✓ Co-op with travel agent to support Maui tour products
 - ✓ Development of Mālama Maui 3D showroom
- **YTD Result:**
 - ✓ Mālama Maui promotion with Yellow Balloon
 - Deliver the Mālama message through Hawai'i products
 - Promote Mālama Maui images on Seoul City buses



MAJOR PROGRAMS

My True Aloha Campaign

- **Timeline:** January – December
- **Program Components:**
 - ✓ Co-op promotion with airlines and OTAs
 - ✓ Trade FAM trip
 - ✓ Consumer photo exhibition and talkshow
 - ✓ #MyTrueAloha social campaign
- **YTD Result:**
 - ✓ Social campaign with #MyTrueAloha
 - Encourage travelers to share their own special experience
 - Promote the authentic culture and beauty of Hawai'i, highlighting local businesses, festivals, agritourism and voluntourism



MAJOR PROGRAMS

Made in Hawai'i Campaign

- **Timeline:** May – July
- **Program Components:**
 - ✓ 'Ono Hawai'i promotion with influencers and major retail company
 - ✓ Made in Hawai'i gift promotion through trade partners
 - ✓ Local food or farms itinerary inclusion in trade FAMs



MAJOR PROGRAMS

Hawai'i Outdoor Campaign

- **Timeline:** Q2 – Q4
- **Program Components:**
 - ✓ Media campaign highlighting Hawai'i outdoor attractions and leisure activities
 - ✓ Outdoor activity influencer FAM
 - ✓ Golf promotion for the Lotte LPGA Tournament



PARTNERSHIP OPPORTUNITIES

ACTIVITY	DATE	POINT OF CONTACT
Hawai'i Travel Mission	OCT 16-17	jiniang@aviareps.com
Educational Trade FAM Tours	MAR, Q4	jiniang@aviareps.com
Mālama Hawai'i Educational Seminars	MAR, JUL	jiniang@aviareps.com
#MyTrueAloha Digital Campaign	Q2 - Q3	gaeunmoon@aviareps.com
Filming Hawai'i Travel Content FAM	Q3	gaeunmoon@aviareps.com
Hawai'i Outdoor Campaign Individual FAM	Q2	gaeunmoon@aviareps.com
Media/Influencer FAM	Q2	gaeunmoon@aviareps.com
Made in Hawai'i Consumer Event	Q2	gaeunmoon@aviareps.com
My Ture Aloha Photo Exhibition	Q2	gaeunmoon@aviareps.com

An aerial night view of a city. In the foreground, a large, traditional Korean palace complex (Gyeongju) is illuminated, featuring dark tiled roofs and a central courtyard. The palace is surrounded by modern roads and parking areas. In the background, a dense urban skyline with numerous skyscrapers is visible, some of which are lit up. A large body of water is situated between the palace and the city skyline. The overall scene is a blend of traditional Korean architecture and modern urban development.

MAHALO!
Kamsa-hap-nida!