



2023 HTA Spring Tourism Update

4.12.2023

Irene Lee
Korea Country Director

HAWAI'I TOURISM KOREA TEAM



Irene Lee
Country Director



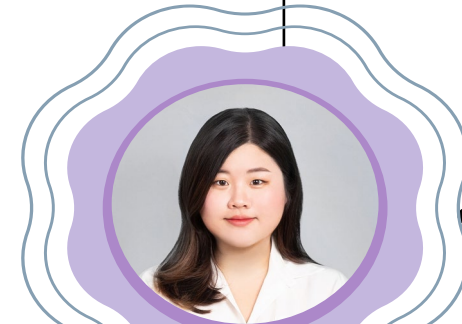
Jin Jang
Account Director



Caitlin Cho
PR & Digital
Marketing
Manager



Sunny Lee
Consumer Information
Officer



Amy Lee
Marketing Assistant



Jinny Choi
Trade
Marketing
Executive

MARKET SITUATION



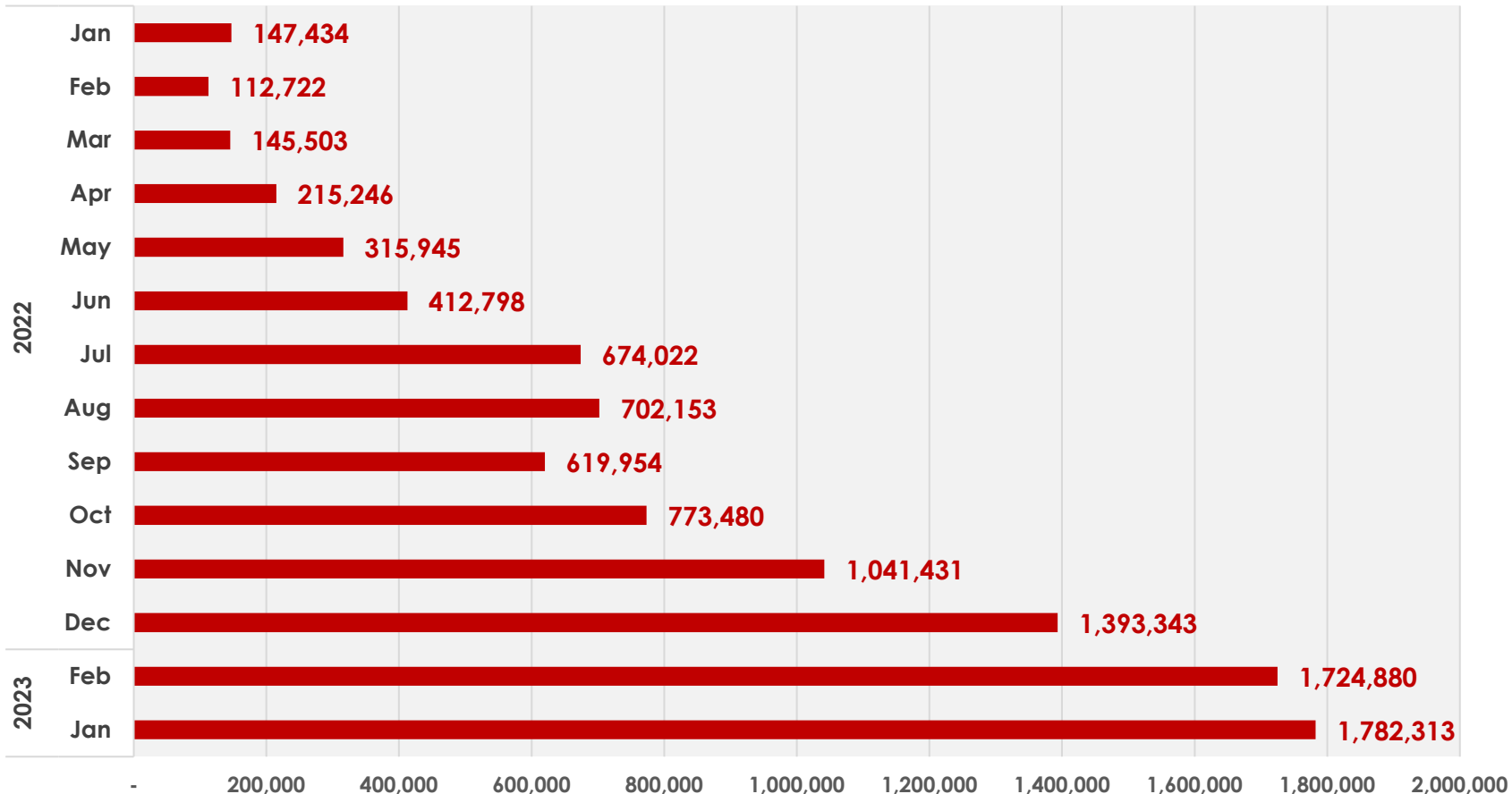


GENERAL ECONOMY

- 2023 Korea's GDP growth forecasted at 1.8%
External issues - slow Chinese economy, rise in energy prices, worsening semiconductor exports
- In March, the average exchange rate of KRW1,307.94 is appreciated 10.2% against USD from KRW1,440.94 of October 2022, the lowest in 2022
- Base interest rate increased to 3.5% from 1% a year ago
- Fuel surcharge for a round trip to Hawai'i from Korea in March was \$195.4, a year-on-year increase of 37%

OUTBOUND TRAVEL

No. of Korean Outbound Travelers (2022-23)



TOP 10 OUTBOUND DESTINATIONS IN JAN, 2023

Rank	Country	KR Visitors
1	Japan	565,200
2	Vietnam	258,946
3	U.S.A	141,825
4	Philippines	127,101
5	Singapore	60,442
6	Guam	39,633
7	Turkiye	14,075
8	Saipan	10,097
9	Austria	9,600
10	Hong Kong	6,782

Source: datalab.visitkorea.or.kr/
traveldaily.co.kr

OUTBOUND TRAVEL



Premium vs Low-Cost, polarization in package tour



Gap travelers on the rise, who travel in short terms during their spare time



Travel TV show continues to have large influence despite shifting media landscape



Struggle with shortage of tourism staffs, meanwhile the tourism industry recover rapidly

AIR SEAT SYNOPSIS

***Q1 total air seats from Korea**

- Jan-Mar 2019: 88,217
- Jan-Mar 2023: 75,315
- **Jan-Mar 2019 vs. Jan-Mar 2023: -14.6%**



Frequency

daily

5 x weekly in March

5 x weekly

Seats (Aircraft)

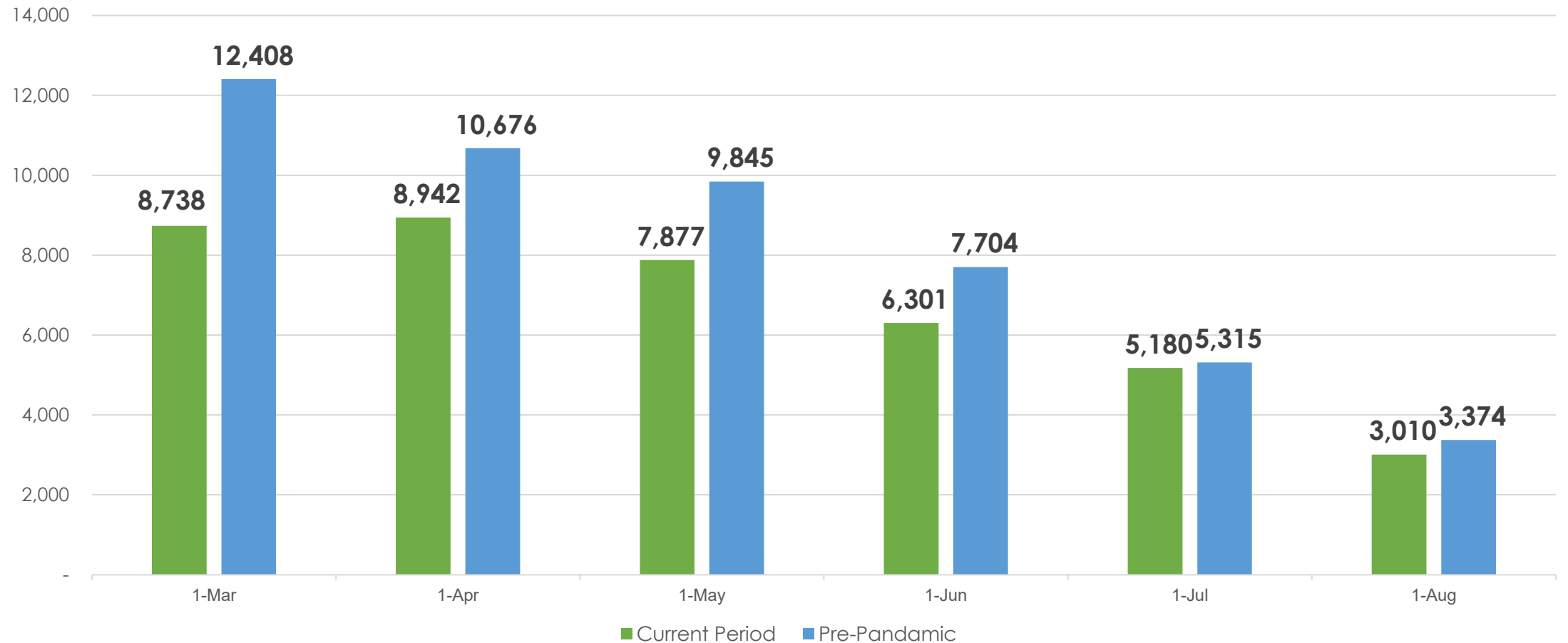
368 seats (B747-8i)

300 seats (B777)

278 seats (A330)

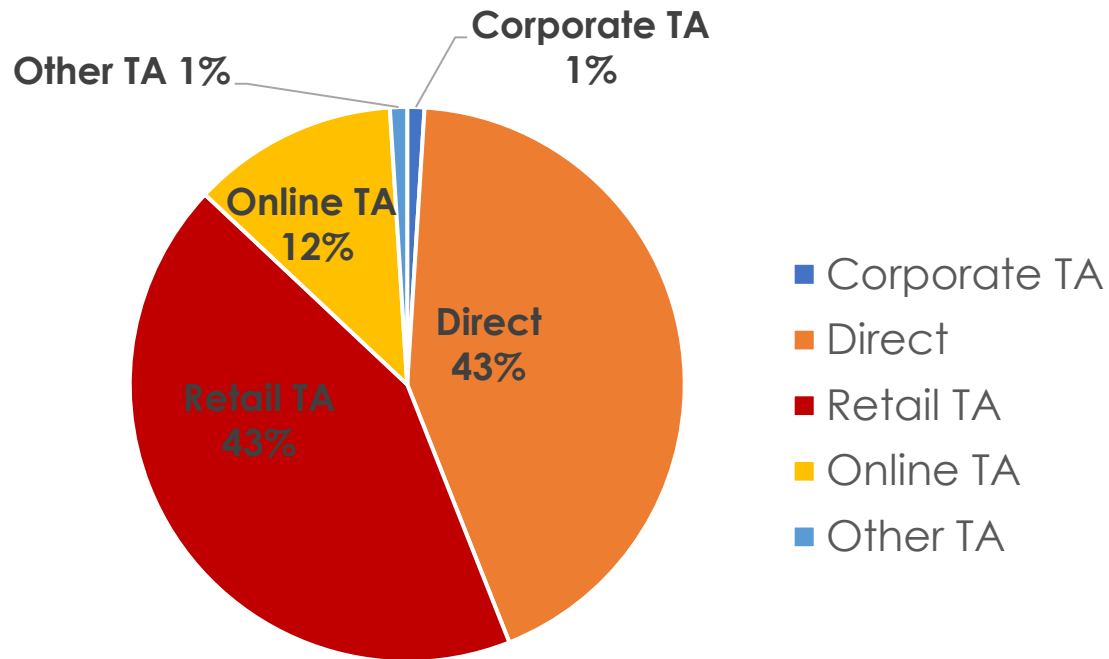
BOOKING PACE

Six Month Outlook - Korea

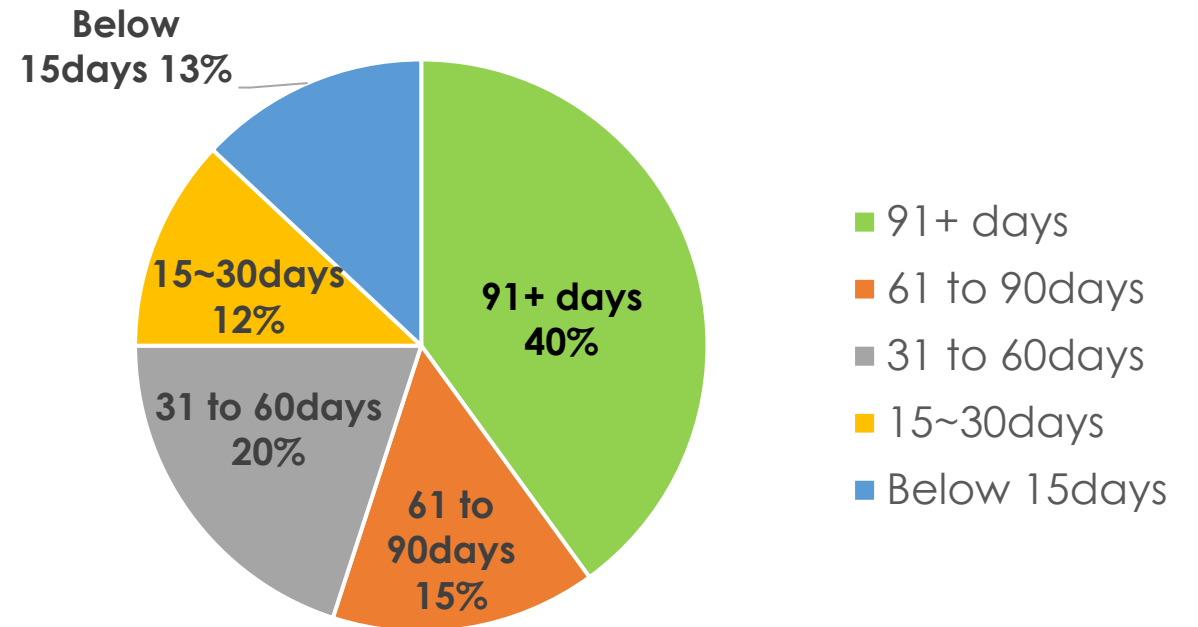


DISTRIBUTION CHANNEL & LEAD TIME

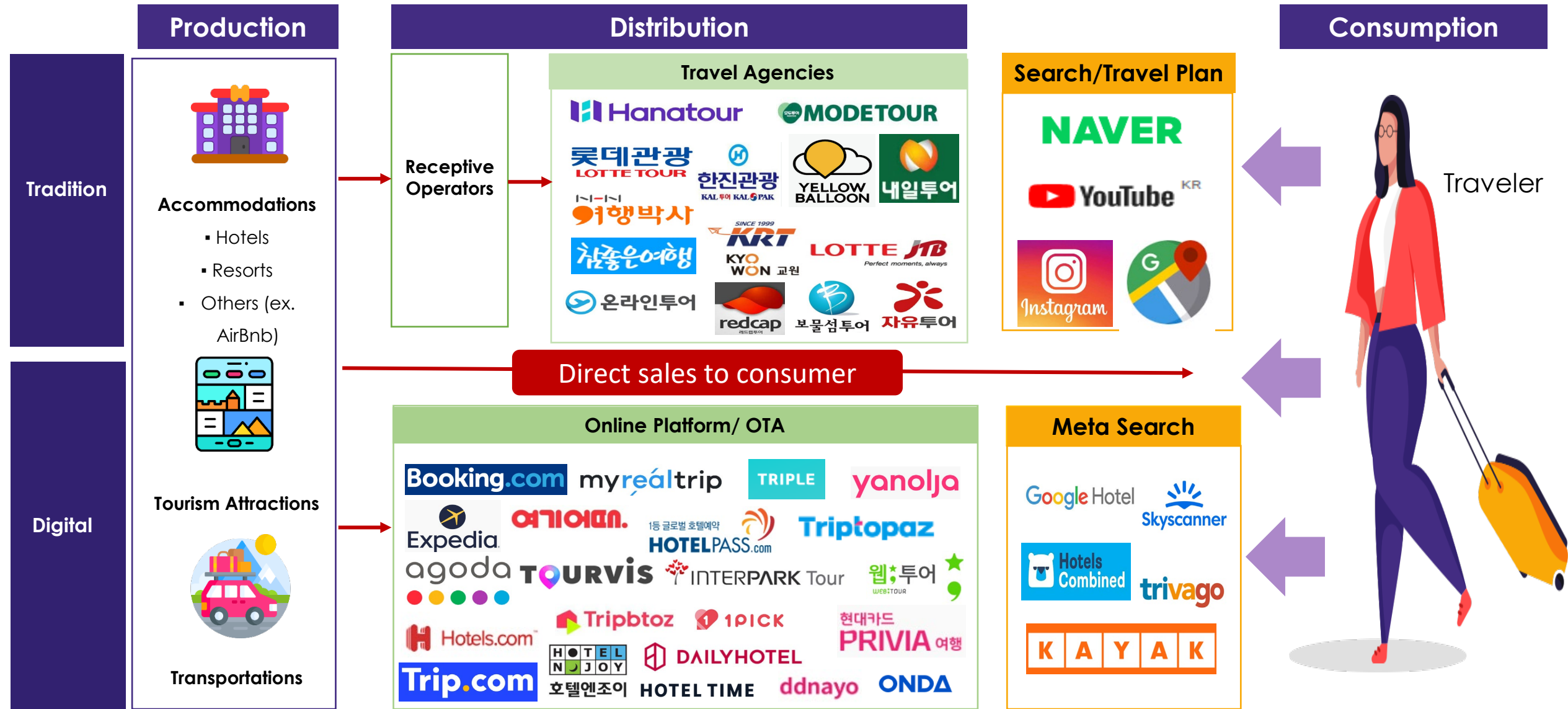
Distribution Channel



Lead Time



DISTRIBUTION CHANNEL



Preferred long-haul travel destinations for 2023 Holidays

Rank	Country
1	Western Europe
2	Australia
3	Hawai'i
4	Eastern Canada

2023 Korea Public Holidays

**Months of May and September have long holidays

May 1	Labor day
May 5	Children's Day
May 27	Buddha's Birthday
June 6	Memorial Day
Aug 15	Liberation Day
Sept 28-30	Chuseok (Korean Thanksgiving)
Oct 3	National Foundation Day
Oct 9	Hangeul Day
Dec 25	Christmas Day

COMPETITIVE LANDSCAPE



**Western Europe
(Switzerland - Italy - France)**



Australia (Sydney)



Eastern Canada

* Source: Korea Travel Times

TARGET AUDIENCE



TARGET AUDIENCE

- **Target market size:** 7 million people
- **Key Geographic Area:** Seoul, Busan
- **Target households with income:** \$70,000 and double income over \$100,000

Mindful Travelers

Avid Travelers
20s~50s



Romance
20s~40s



Wellness Seekers
20s~40s



Outdoor Goers
20s~60s



CORE BRANDING MESSAGE





CORE BRANDING MESSAGE

— *MĀLAMA* —
HAWAI'I
하와이 배려여행

HTK core branding message for 2023 is **Mālama Hawai'i**

The message will give Korean visitors a more meaningful and enriching travel experience, inspiring them to participate in more purposeful activities during their trip and future stays in Hawai'i

Q1 REVIEW



KOREA MARKET STATS

- **Visitor expenditures:** \$86.8M
- **Primary Purpose of Stay:** Pleasure (29,375) vs MCI (1,145)
- **Average Length of Stay:** 9.22 days
- **First Time Visitors:** 66.9%
- **Repeat Visitors:** 33.1%

Korea (by Air)	2019	2020	2021	2022P	2023 Annual Forecast*	YTD Feb. 2023P	YTD Feb. 2022P	%Change
Visitor Expenditures (\$ Millions)	497.9	NA	41.6	285.4	345.6	86.8	15.8	450.7%
Visitor Days	1,745,666	404,206	149,496	972,209	1,121,316	285,799	56,722	403.9%
Arrivals	229,056	46,884	10,652	111,298	144,322	31,013	3,627	755.1%
Average Daily Census	4,783	1,104	410	2,664	3,072	4,844	155	3,017.1%
Per Person Per Day Spending (\$)	285.2	NA	278	293.5	308.2	303.8	278.0	9.3%
Per Person Per Trip Spending (\$)	2,173.70	NA	3,901.50	2,564.20	2,394.6	2,799.9	4,347.7	-35.6%
Length of Stay (days)	7.62	8.62	14.03	8.74	7.77	9.22	15.64	-41.1%

KOREA MARKET STATS

* Korea Market Recovery (Feb 2019 vs. Feb 2023)

21,871pax (2019)
vs.
13,771pax (2023)
63% recovery

\$45.6M (2019)
vs.
\$37.1M (2023)
81% recovery

8.1days (2019)
vs.
9days (2023)
11% ↑

\$256.2 (2019)
vs.
\$298.3 (2023)
16.4% ↑

Visitor Arrival (pax)

Visitor
Expenditures (\$ M)

Length of Stay (day)

Per Person Per Day
Spending (\$)

Q1 REVIEW

Trade Fam with Asiana Airlines(OZ) Busan

- Period: March 5 – 11, 2023
- Itinerary: 5N/7D, O‘ahu
- Participants: 8 pax (7 Busan travel agents + 1 OZ Staff)
- HTK Support: 3 tourism activities (Kualoa Ranch's Mālama experience, Turtle Snorkeling Package, Star of Honolulu Dinner Cruise)
- Deliverables: Busan travel agents will develop Hawai'i travel packages targeted at potential travelers in Busan, Ulsan, and Gyeongsang-namdo Province (Southeast area)



Q1 REVIEW

Celebrity Golf YouTube Filming

- Youtube channel: Gura's Cuckoo Golf TV (364k followers)
- Filming date: January 9 – 14 (3N/5D)
- Theme: Hawai'i Golf & Mālama Hawai'i
- Program activities: Hawai'i golf trip, Taro planting and ocean activities in Kualoa Ranch
- Partners: Ritz Carlton Residences Waikīkī, Polynesian Residence, and Island Vintage Wine Bar
- Results: published 4 episodes of Hawai'i filmed videos with vibrant and fun content including Mālama Hawai'i activities
Generated 610,000+ views
- Links: youtube.com/@gimgulauippeokkugigolpeuTV



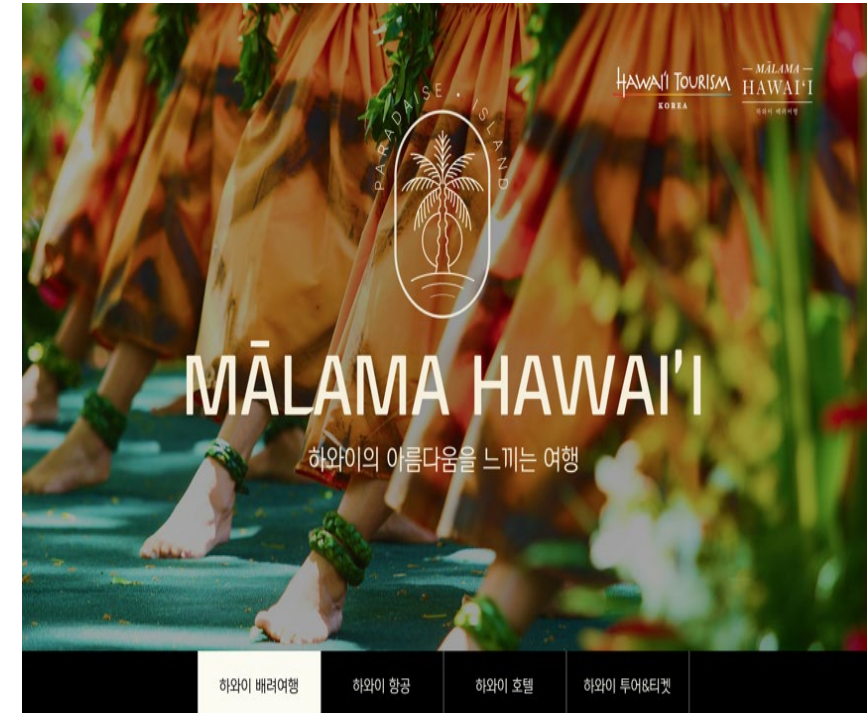
BMP UPDATE



BMP UPDATE

Mālama Hawai'i Campaign with Travel Trade Partners

- **Target:** mindful travelers
- **Objectives:** Inspire Korean travelers to visit the Hawaiian islands and deliver the key message of Mālama Hawai'i to foster sustainable and responsible patronage of the islands
- **Timeline:** April – June
- **Program:**
 - Airline co-op: collaborate with Korean Air and Asiana airlines through branding campaign
 - OTA co-op: develop with Interpark and Tidesquare the regenerative tourism products and implement large-scale online advertisement campaign
 - Educational seminars through Mode Tour x Brand USA Roadshow in 4 major cities
- **Projected outcomes:**
 - ✓ Increased number of Hawai'i visitors who understand and support Mālama Hawai'i
 - ✓ Increased number of Hawai'i travelers who engage in local give-back activities



하와이 배려여행 하와이 항공 하와이 호텔 하와이 투어&티켓


Mālama Hawai'i
하와이 배려여행

말라마는 배려, 보호, 존중을 의미하는 하와이어입니다.

하와이의 대자연과 전통문화, 지역 사회를 함께 보호해 주세요.
자연과 공존할 수 있는 하와이의 지속 가능한 환경을 만들어가기 위해
여행자 여러분의 '배려'가 필요합니다.

BMP UPDATE

Hawai'i Golf Promotion

- **Target audience:** FIT Travelers / Golf Enthusiasts
- **Objectives:** Pitch Hawai'i as a year-round premium golf destination in the Korean market to inspire audiences to stay longer and spend more
- **Timeline:** April - June
- **Campaign components:**
 - ✓ **PR/Consumer:**
 - Introduce Hawai'i golf courses through press releases and social channels
 - Develop influencers collaboration
 - ✓ **Trade:**
 - Provide support to Lotte JTBC for 100 VIP corporates guests
 - Collaborate with Lotte JTBC to develop golf product packages
 - VIP Golf FAM
- **Projected outcomes:**
 - ✓ Support Lotte JTBC in maximizing the PR Value by \$50,000 minimum
 - ✓ Ad Value of \$30,000 from social media coverage and engagement
 - ✓ Travel agent partner to develop 2 Hawai'i golf products



LOTTE CHAMPIONSHIP 2023 LPGA LOTTE Championship
 인기 LPGA 선수들의 감동적인 플레이를 직접 관전!
 2023 LPGA LOTTE Championship 참가의 감동과 함께, 아름다운 하와이의 자연에서의 꿈에 라운딩으로 여러분을 초대합니다.

대회명	2023 LPGA LOTTE Championship	참가선수	LPGA 프로 144명
대회기간	2023년 4월 9일(일)~4월 15일(토) *현지시간	주관방송	The Golf Channel (국외) JTBC Golf (국내)
대회장소	Hoakalei Country Club, Hawaii, USA		



BMP UPDATE

Wellness Hawai'i Campaign

- **Target audience:** Wellness Seekers
- **Objectives:** Position Hawai'i as an ultimate wellness travel destination to enrich body and soul in alignment with Korea consumer trends seeking wellness travel
- **Timeline:** April 24
- **Campaign components:**
 - ✓ **PR:**
 - In partnership with Allure Magazine the development of a special travel issue in July for celebrity photoshoot focused on the wellness theme and Hawai'i
 - ✓ **Consumer:**
 - To participate the Green Allure Festival, a leading sustainable products event happening in the heart of Seoul
 - Develop a wellness-themed booth next to other sustainable lifestyle products/brands
 - ✓ **Projected outcomes:**
 - Social media & PR value of minimum \$200,000 and minimum 3K increase in HTK Instagram followers

green
allure



BMP UPDATE

Hawai'i Honeymoon Campaign

- **Target audience:** Honeymooners
- **Objectives:** Position the Hawaiian Islands as a top honeymoon destination for honeymooners
- **Timeline:** April – June
- **Campaign components:**
 - ✓ **PR:**
 - Promote and introduce the honeymoon tourism attractions and travel information about Hawai'i as an ideal honeymoon destination
 - Invite a celebrity influencer couple and a photographer to generate social buzz and create photo and video assets to be utilized on HTK's official channels
 - ✓ **Trade:**
 - In coordination with travel agencies to develop Hawai'i honeymoon products and support their promotion to increase sales to visit Hawai'i
 - ✓ **Projected outcomes:**
 - Advertorial coverages/equivalent PR value of minimum \$50,000 from digital and print
 - Develop Hawai'i honeymoon tour products and maximize the number of product sales



BMP UPDATE

Made in Hawai'i Digital Campaign

- **Target audience:** FIT Travelers / Foodies
- **Objectives:** Increase awareness of Hawai'i food and support local businesses following the explosive growth of Koreans' interest in food & beverage
- **Timeline:** June
- **Program components:**
 - In partnership with SSG.com, Korea's leading integrated online shopping mall owned by Shinsegae Group, promote Hawai'i culinary recipes to inspire Korean consumers
 - Conduct brand co-ops, offline events, social media campaigns, and ad campaigns
- **Projected outcomes:**
 - ✓ PR Value of \$100,000 from offline consumer reach and engagement on social channels
 - ✓ Familiarize Korea consumers with the Hawaiian word 'Ono through social content marketing and increase social media traffic on F&B in Korea through HTK's social channels



BMP UPDATE

Hawai'i Travel Mission

- **Target audience:** Island Chapters, Hawai'i Industry Partners, Korea Travel Trade Partners and Trade Media
- **Objectives:** Provide multiple opportunities to connect Hawai'i partners with Korea's leading travel trade players through business meetings and networking
- **Timeline:** Oct / Nov (dates to be announced)
- **Campaign components:** educational seminar, 1:1 Hawai'i travel mart, Aloha VIP reception
- **Projected outcomes:**
 - ✓ 100+ travel partners
 - ✓ 10+ travel mart meetings per participating company



PARTNERSHIP OPPORTUNITIES

PARTNERSHIP OPPORTUNITIES

ACTIVITY	DATE	DESCRIPTION	LOCATION	COST	Person in Charge
TRADE FAMILIARIZATION TRIPS (FAMS)					
Neighbor Island Trade Promotion through trade FAM tour	May	Invite selected participants from top agencies in Korea to the Hawaiian Islands to provide the opportunity to learn the destinations in deeper dive. HTK will hold the FAM tours twice in Mar and Jun.	O'ahu + Hawai'i Island	HTK welcomes any in-kind sponsorships as below; <ul style="list-style-type: none"> • Accommodations • Hosted Meals • Activities • Transportation • Airfares 	Jin Jang Account director Email: jinjang@aviareps.com
HAWAI'I TRAVEL MISSION					
Hawai'i Travel Mission in Korea	Oct/Nov	Hawai'i Travel Mission will provide multiple opportunities to connect Hawai'i Partners with Korea's leading travel trade players through business meetings and networking	Seoul	HTK welcomes to the partners' participation and any in-kinds sponsorships for door prizes as below: <ul style="list-style-type: none"> • Accommodations • Activities • Transportation • Made in Hawai'i products 	Jin Jang Account director Email: jinjang@aviareps.com
PUBLIC RELATIONS					
Mālama Hawai'i Branding Campaign	Q2	Implement IMC advertising campaigns that feature various aspects of the Hawaiian Islands – natural resources, cultural authenticity, unique culinary experience, and once-in-a-lifetime adventure utilizing HTA assets.	Seoul	HTK welcomes any in-kind sponsorships as below; <ul style="list-style-type: none"> • Accommodations • Hosted Meals • Activities • Transportation • Airfares 	Caitlin Cho PR & Digital Marketing Manager Email: caitlincho@aviareps.com

PARTNERSHIP OPPORTUNITIES

ACTIVITY	DATE	DESCRIPTION	LOCATION	COST	Person in Charge
CONSUMER PROMOTION					
Wellness Celebrity Photoshoot	May-Jun	Invite a A-list celebrity to Hawai'i to feature wellness trip to Hawai'i showcasing the majestic nature of the Hawaiian Islands.	O'ahu and 1 neighbor Island	HTK welcomes any in-kind sponsorships as below; <ul style="list-style-type: none"> • Accommodations • Hosted Meals • Activities • Transportation • Airfares 	Caitlin Cho PR & Digital Marketing Manager Email: caitlincho@aviareps.com
Group Media / Influencer FAM	April	Develop a Made-in-Hawai'i themed itinerary to travel the Hawaiian Islands and invite leading media and influencers to create high profile Hawai'i content which will be published on social channels and print magazine.	O'ahu and Maui	HTK welcomes any in-kind sponsorships as below; <ul style="list-style-type: none"> • Accommodations • Hosted Meals • Activities • Transportation • Airfares 	Caitlin Cho PR & Digital Marketing Manager Email: caitlincho@aviareps.com
Made in Hawai'i Campaign	May - Jun	Activate PR and marketing promotion to increase awareness of Hawai'i food and support Hawai'i's local business following the explosive growth of Korean consumers' interest in F&B through brand co-op, offline event, social campaign, ad campaign, etc.	Seoul	HTK welcomes any in-kind sponsorships as below; <ul style="list-style-type: none"> • Accommodations • Hosted Meals • Activities • Transportation • Airfares 	Caitlin Cho PR & Digital Marketing Manager Email: caitlincho@aviareps.com
CONSUMER SHOWS					
Wellness Hawai'i Campaign	April	Develop an offline consumer event to showcase the beauty of Hawai'i's natural resources and to educate the consumers about Mālama Hawai'i and Kuleana	Seoul	HTK welcomes any in-kind sponsorships as below; <ul style="list-style-type: none"> • Accommodations • Hosted Meals • Activities • Transportation • Airfares 	Caitlin Cho PR & Digital Marketing Manager Email: caitlincho@aviareps.com

An aerial night view of a city. In the foreground, a traditional Korean palace complex (Gyeongbokgung) is illuminated, featuring dark tiled roofs and a central courtyard. The palace is surrounded by a road with cars and a parking lot. In the background, a modern city 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. The text "MAHALO! Kamsa-hap-nida!" is overlaid in the center of the image.

MAHALO!
Kamsa-hap-nida!