

HAWAII TOURISM™

KOREA



2023 Hawai'i Industry Partners Group Meeting

8.25.2023

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Korea Country Director

Irene Lee
Country Director of Korea



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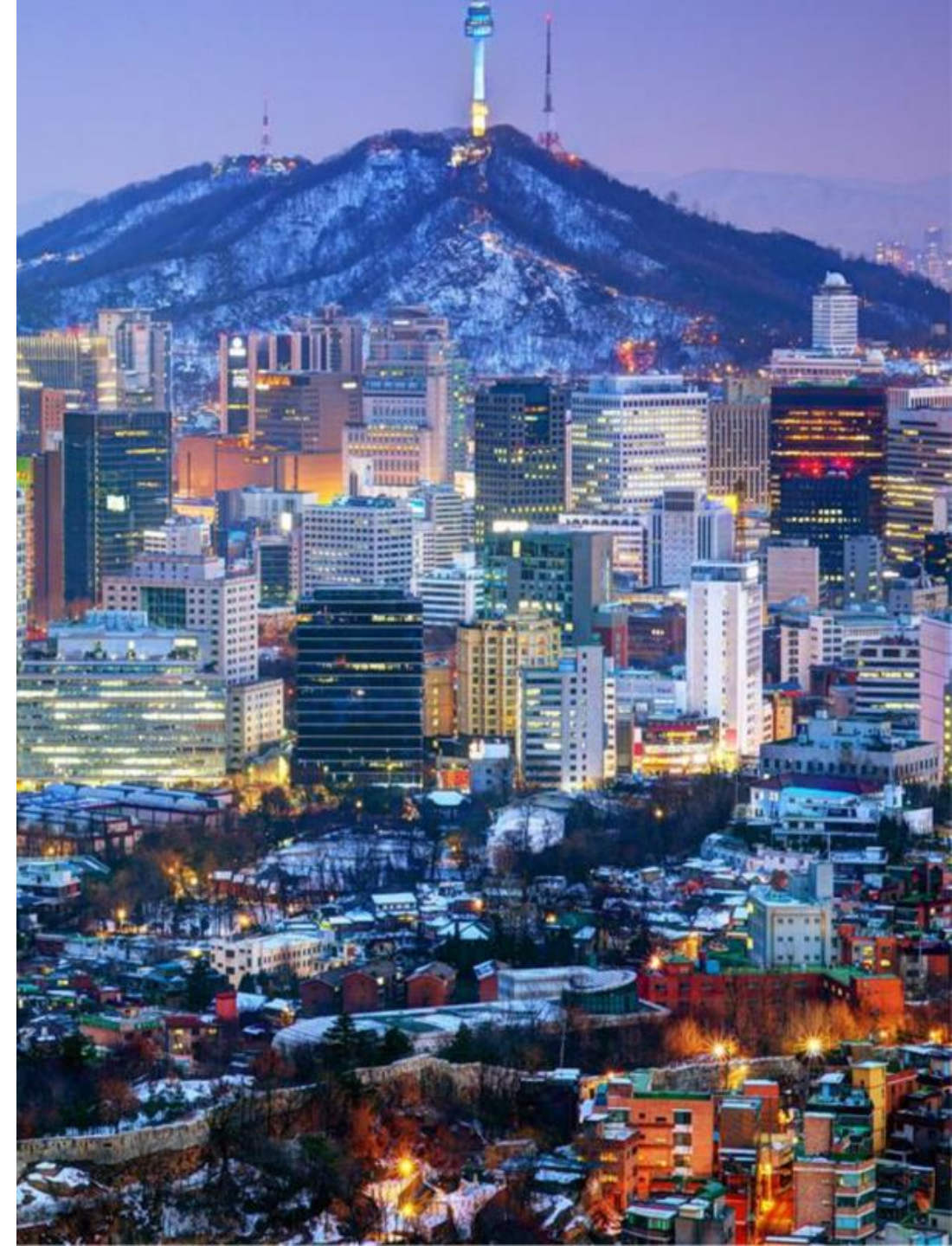
HAWAI'I TOURISM KOREA TEAM

MARKET SITUATION



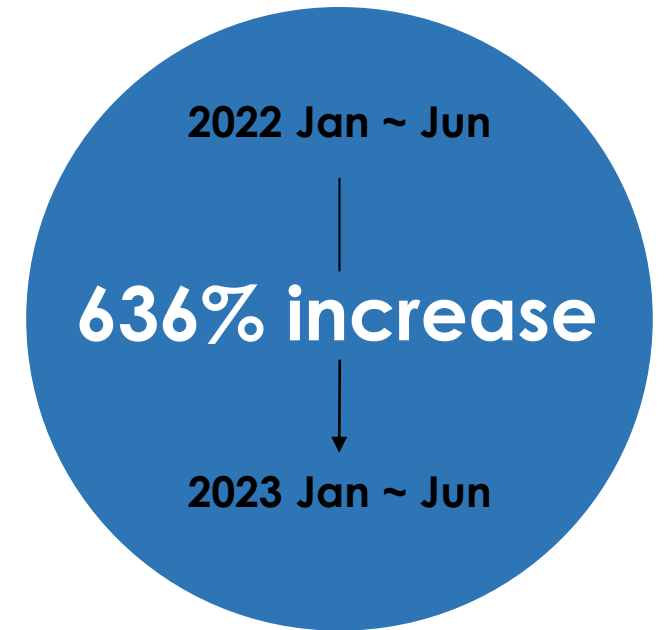
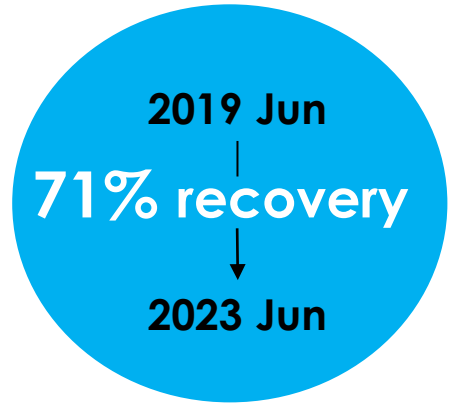
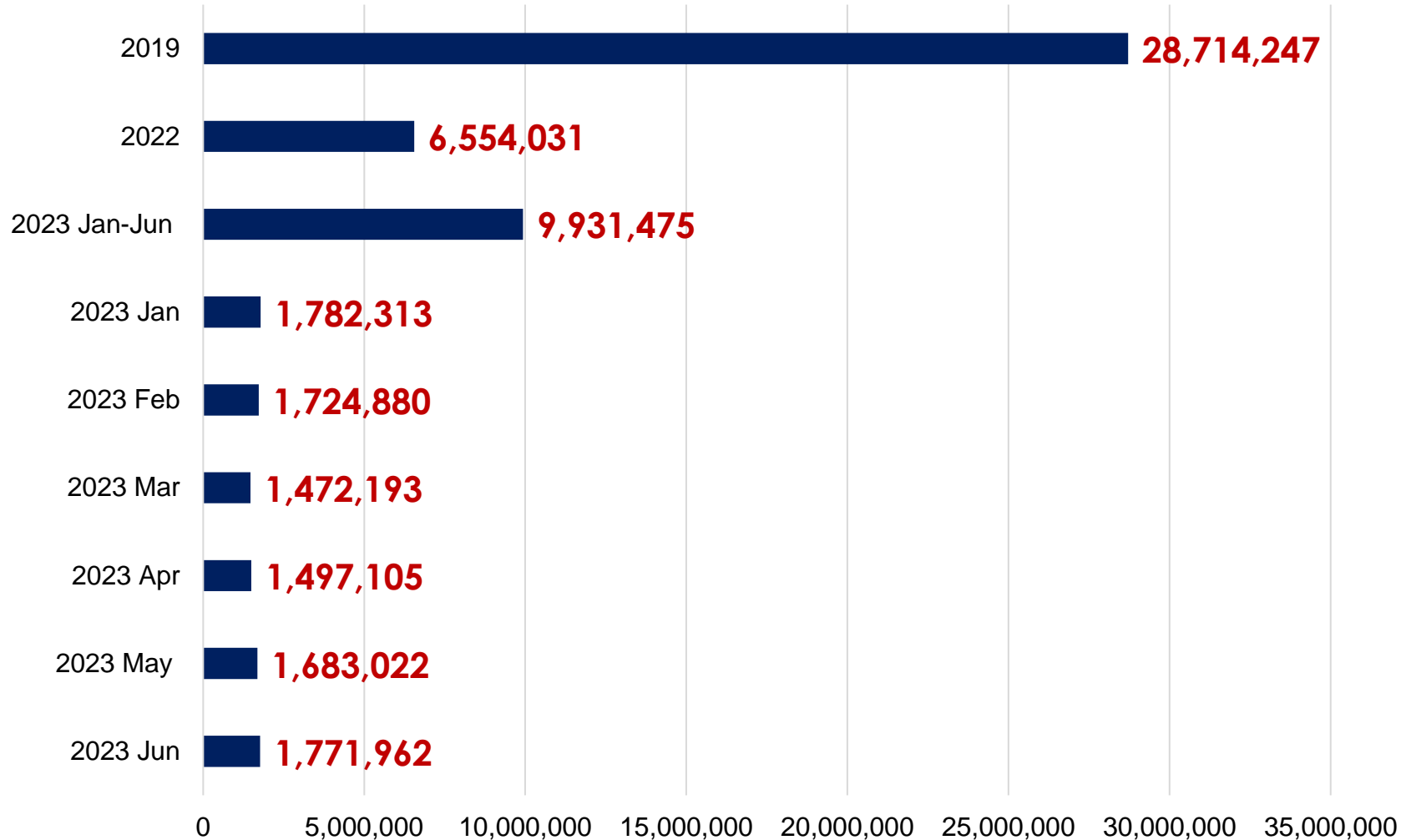
GENERAL ECONOMY

- 2023 Korea's GDP growth forecasted at 1.3% due to sluggishness in exports, consumption, and investment
- Korea's consumer price inflation is expected to be 3.5% this year, which is higher than the earlier predictions. Reasons - ongoing increase in consumer prices, despite stable energy and food prices
- In June, the average exchange rate was KRW1,298.29, continuing to depreciate against strong USD
- Fuel surcharge for a round trip to Hawai'i from Korea in August is \$121.5, a year-on-year decrease of 62.3%
- The unemployment rate in Korea decreased to 2.5%, nearly half of the OECD average (4.8%)



OUTBOUND TRAVEL

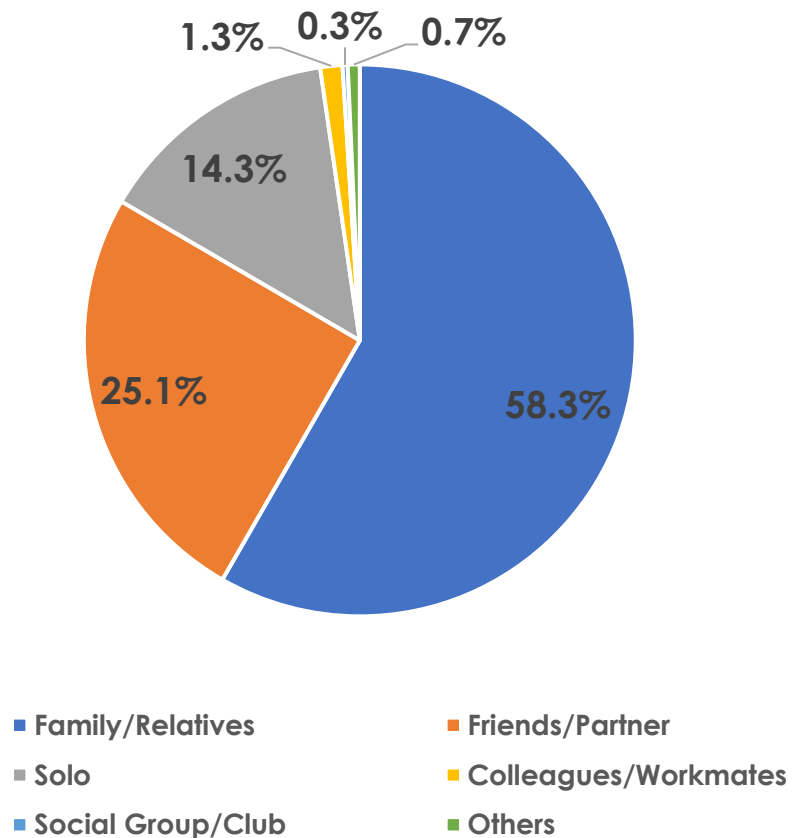
No. of Korean Outbound Travelers



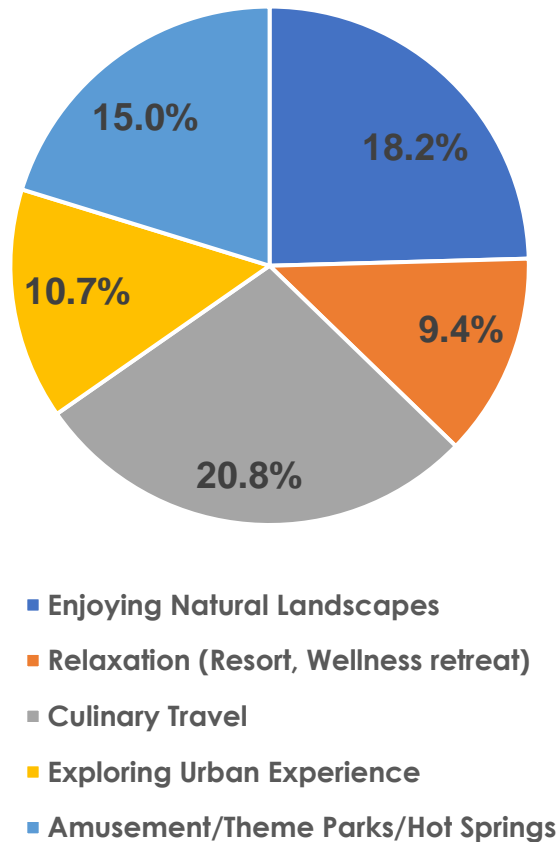
OUTBOUND TRAVEL SENTIMENT

Korean Summer Vacation trends (Jul-Aug)

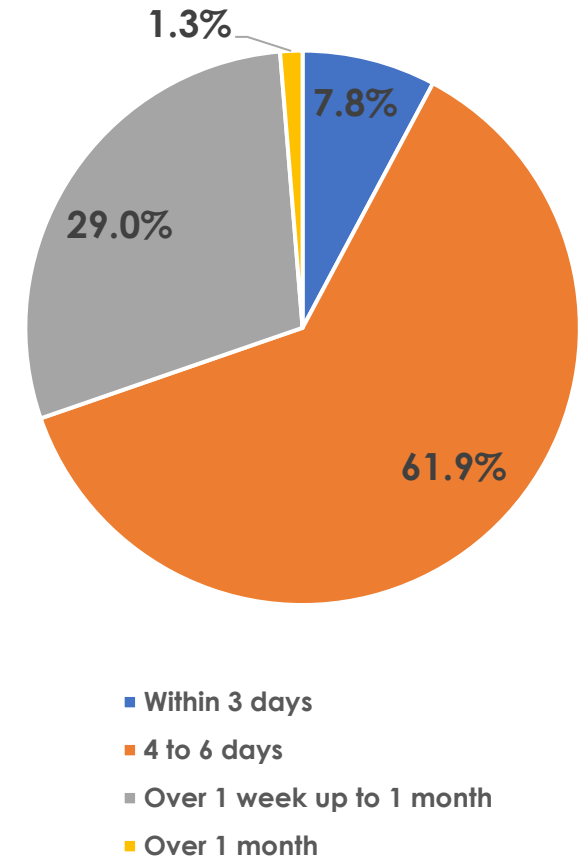
Travel Companions



Preferred Vacation Activities



Travel Duration



Current Flight Operations as of August 2023:

Korean Air: daily flights to HNL

Asiana Airlines: 5 weekly flights to HNL

Hawaiian Airlines: 5 weekly flights to HNL

AIR SEAT SYNOPSIS

	Q2, 2023 (APR – JUN)		Q3, 2023 (JUL-SEP)	
Year	TOTAL AIR SEATS FROM KOREA	TOTAL FLIGHTS FROM KOREA	TOTAL AIR SEATS FROM KOREA	TOTAL FLIGHTS FROM KOREA
2019	71,121	227	84,676	265
2022	48,135	152	70,482	219
2023	67,645	220	65,450	226
2022 vs. 2023	+40.5%	+44.7%	-7.1%	+3.2%
2019 vs. 2023	- 4.9%	-3.1%	-22.7%	-14.7%

HA operate six weekly flights for two weeks on Sept - Oct



Hawaiian Airlines (HA) plans to operate six weekly flights for two weeks, the 4th week of September and the 1st week of October, to meet demand for Korea's Chuseok holidays (September 28 - October 1).

FLIGHT	DATE	DEPARTURE TIME	ARRIVAL TIME	SEATS (Aircraft)
460	28 - SEP - 23 (THURS)	ICN 21:15	HNL 21:15	278 Seats (A330)
	03 - OCT - 23 (TUES)			
459	27 - SEP - 23 (WEDS)	HNL 14:05	ICN 19:00 + 1	278 Seats (A330)
	02 - OCT - 23 (MON)			

AIR SEAT SYNOPSIS

Upcoming new flight service



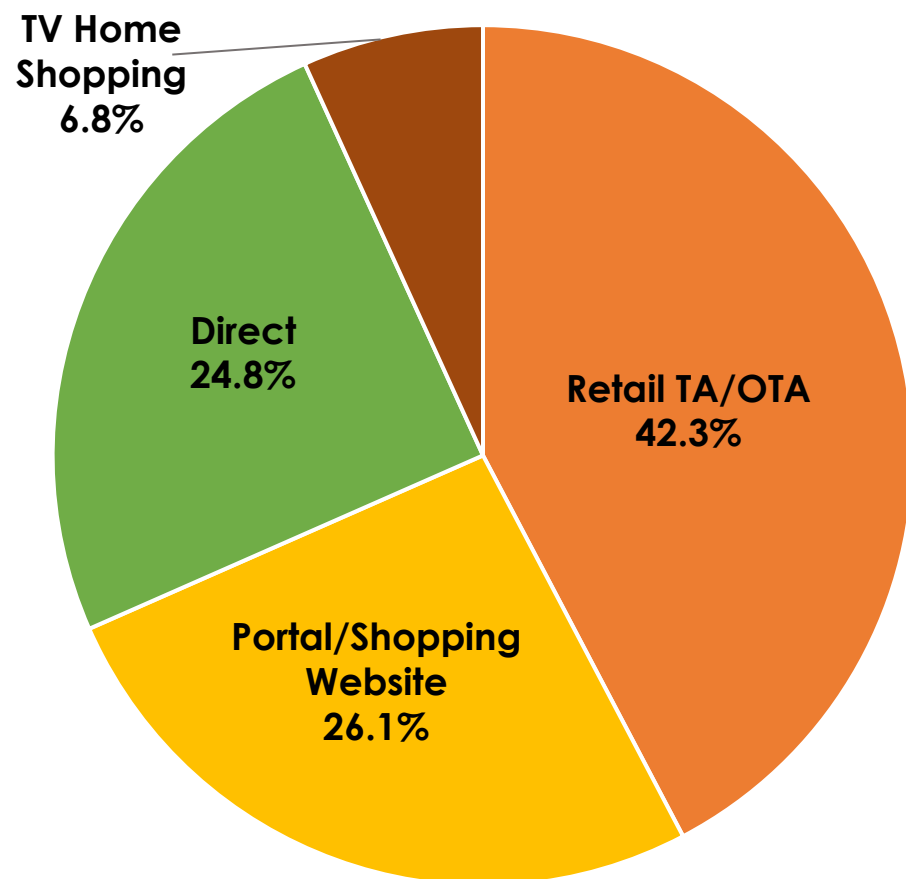
Air Premia is considering adding seasonal service to Hawai'i.

- Korean Hybrid-Service carrier
- Air Premia plans to operate irregular flights from Incheon to Hawai'i from December 31, 2023, to March 31, 2024.
- Air Premia's existing route: Frankfurt (FRA), New York (EWR), Bangkok (BKK), Tokyo/Narita (NRT), Los Angeles, and Ho Chi Minh City.

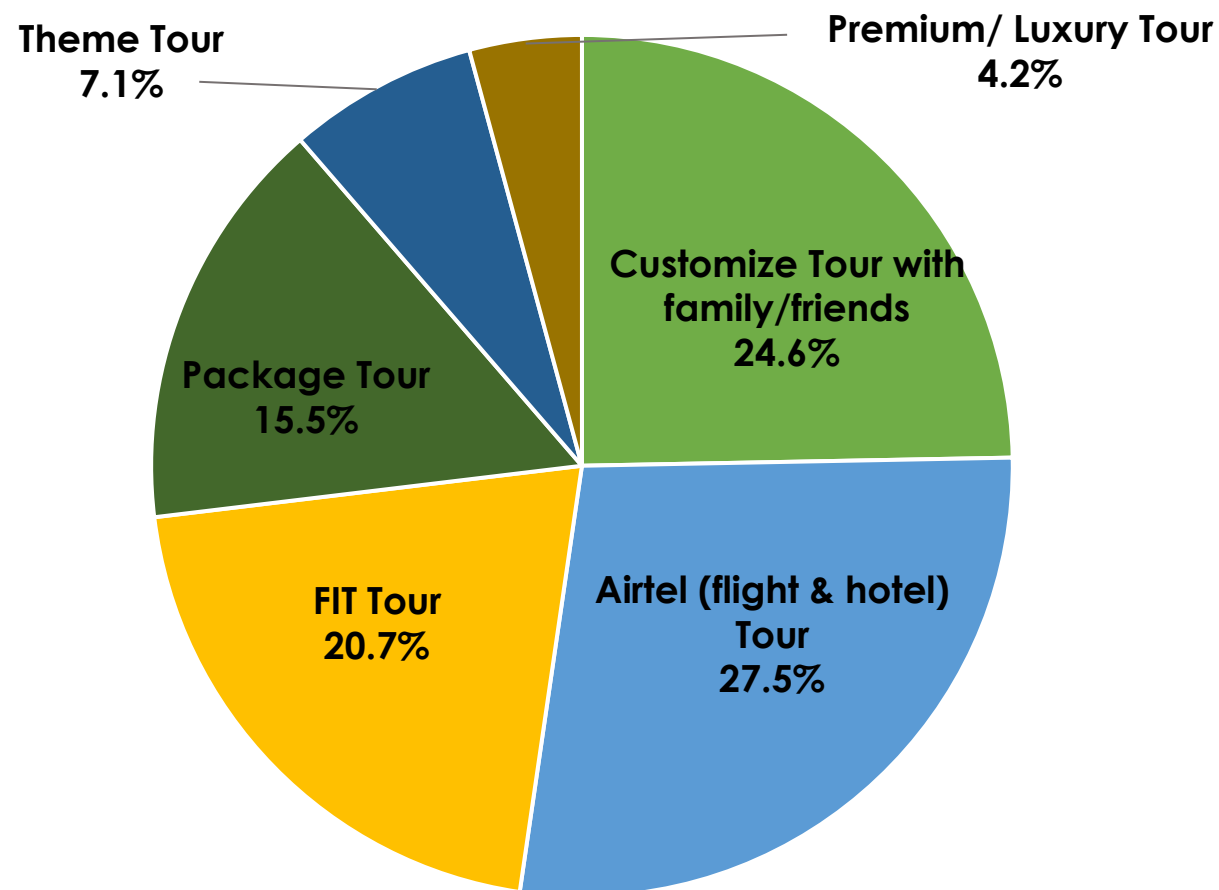
FLIGHT	AIRCRAFT	SEATS	SCHEDULE
HL8517	Boing 787-9	338 Seats	4 times a week

DISTRIBUTION CHANNEL & PREFERRED PRODUCT

Booking Channel



Preferred Products



Popular travel destinations in Jul-Aug



Long-haul destination
Western Europe (Switzerland ▪ Italy ▪ France)

COMPETITIVE LANDSCAPE



Short-haul destination
Japan ▪ Vietnam ▪ Thailand

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



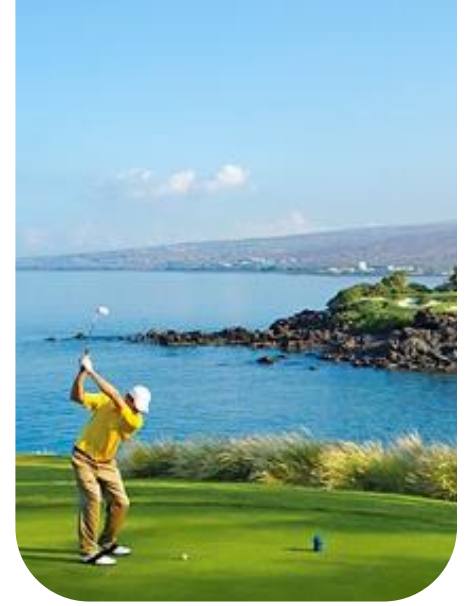
Romance 20s~40s



Wellness Seekers 20s~40s



Outdoor Goers 20s~60s



YTD Review (January – August)

KOREA MARKET STATS

- **Visitor expenditures:** \$219.9M
- **Primary Purpose of Stay:** Pleasure (78,687) vs MCI (2,298)
- **Average Length of Stay:** 8.56 days
- **First Time Visitors:** 71.8%
- **Repeat Visitors:** 28.2%

Korea (by Air)	2019	2020	2021	2022P	2023 Annual Forecast*	YTD June 2023P	YTD June 2022P	%Change
Visitor Expenditures (\$ Millions)	497.9	NA	41.6	285.4	550.1	219.9	91.2	141.0%
Visitor Days	1,745,666	404,206	149,496	972,209	1,802,736	710,572	331,307	126.8%
Arrivals	229,056	46,884	10,652	111,298	204,734	83,034	33,265	149.6%
Average Daily Census	4,783	1,104	410	2,664	4,939	3,926	1,731	126.8%
Per Person Per Day Spending (\$)	285.2	NA	278	293.5	305.1	309.5	291.2	6.3%
Per Person Per Trip Spending (\$)	2,173.70	NA	3,901.50	2,564.20	2,686.8	2,648.5	2,742.6	-6.4%
Length of Stay (days)	7.62	8.62	14.03	8.74	8.81	8.56	9.42	-12.6%

YTD Review (Jan – Aug)

Mālama Hawai'i Campaign with Hana Card



여행라운지 스탬프
하와이 여행 떠나시나요?
스탬프 찍고 최대 10만머니!
#항공 #숙박 #면세 #하나투어 #해외이용 [바로가기 >](#)

— MĀLAMA —
HAWAI'I

*이미지 제공: 하와이 관광청

하나카드가 하와이 관광청과 함께
'말라마 하와이' 캠페인에 동참합니다.

하와이가 본래의 아름다운 모습을 지켜나갈 수
있도록 '쿨리아나 Kuleana (책임)'를 가지고 말라마
하와이 Mālama Hawai'i(하와이 배려여행)를
기억해주세요.

- ✓ 해양 동식물과 충분한 거리 유지하기
- ✓ 말라마 하와이 정신을 지키는 숙소 이용하기
- ✓ 말라마 하와이 관련 액티비티 즐기기

하와이 배려여행 영상보기

- **Promotion period:** May - June
- **Mālama Hawai'i content:** Mālama Hawai'i official campaign video, Gunstock Ranch's planting donation, manta ray snorkeling, sunset yoga, and forest trekking
- **Result:**
 - ✓ Total media articles: 37
 - ✓ Total clicks: 14,487
 - ✓ Total impressions: 2,454,449



Mālama Hawai'i Campaign with Korean Air

YTD Review (Jan – Aug)



- **Promotion period:** May – June
- **Result:**
 - ✓ Total sales: 400 pax
 - ✓ KakaoTalk: 5,651,328
 - ✓ App push: 266,678
 - ✓ Newsletter: 230,000
 - ✓ Social Impression: 182,000
 - ✓ Event page impression: 500,000

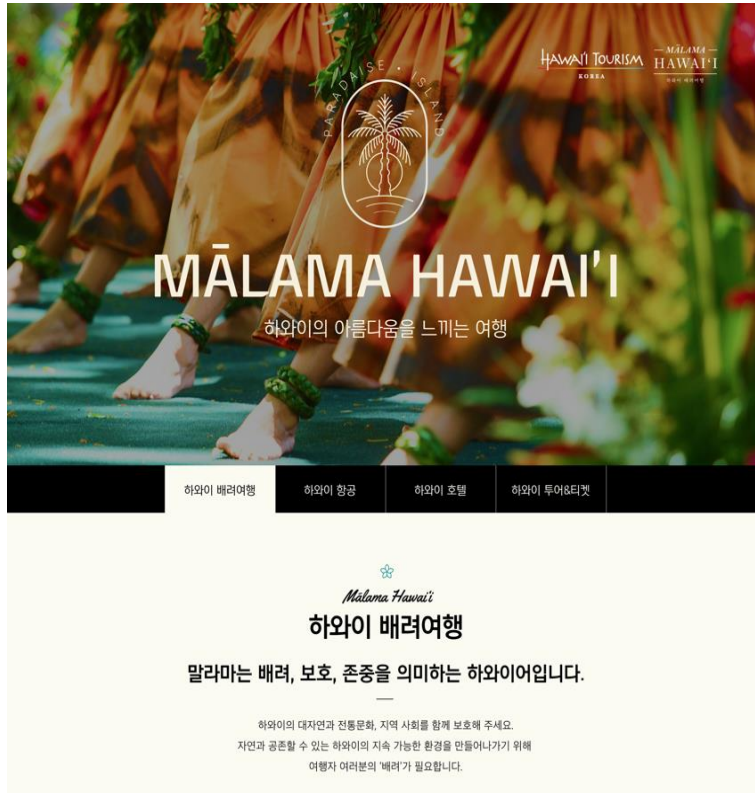


KOREAN AIR				
인천↔하와이 직항 운항 스케줄				
노선	편명	출발	도착	운항요일
인천→호놀룰루	KE053	21:05	10:55	매일
호놀룰루→인천	KE054	13:05	17:45(+1)	매일



YTD Review (Jan – Aug)

Mālama Hawai'i Campaign with Travel Trade Partners



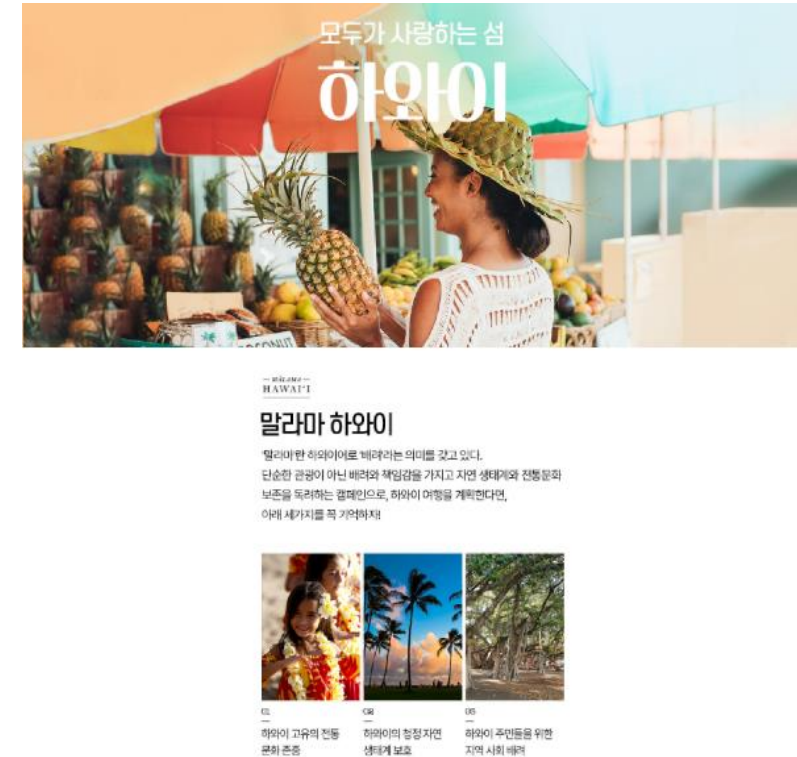
Tidesquare – Mālama Hawai'i Promotion

- 2,984 Air tickets
- 326 bookings for accommodation & Tour
- 378,122 Impressions from PREVIA page, banner, EDM, Naver blog and others



Mode Tour – Aloha & Mālama Promotion

- 1,046 Air tickets
- 4,222,000 online page views
- 530,000 Kakaotalk reach



Interpark & Triple – Beloved Island Hawai'i

- 7,710 Air tickets/ 106 Package & Airtel
- 4,599 special page view
- 3,321,952 email distribution
- 84,047 social media impression
- 14 media articles

YTD Review (Jan – Aug)

Mālama Hawai'i with 3D Showroom



- Mālama Hawai'i 3D Showroom:
<https://malamahawaii.co.kr/>



YTD Review (Jan – Aug)

Trade FAM with Hawaiian Airlines



- **Dates:** May 8 – 14
- **Itinerary:** 5N/7D O'ahu + Hawai'i Island
- **Participants:** 10 pax (8 trade partners + 1 HA + 1 HTK escort)
- **Participating industry partners:** Courtyard King Kamehameha's Kona Beach Hotel, Waikīkī Beach Marriot Resort & Spa, Kāhala Hotel and Resort, and Polynesian Cultural Center (PCC)

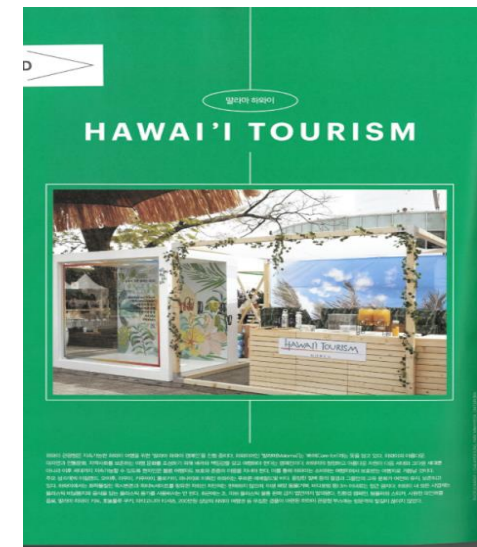


YTD Review (Jan – Aug)

Wellness Hawai'i Campaign



- **Date:** April 24, 2023
- **Place:** Namsan Octagonal Pavilion & N Seoul Tower
- **HTK booth programs:** Mālama hashtag event, Hawai'i bucket list event, Mālama Quiz event
- **Result:**
 - ✓ Total online reach: 1,460,000
 - ✓ 6,000 event tickets sold out in five hours
 - ✓ Consumer check-ins at the HTK booth: about 500
 - ✓ 4 page print article in Allure's May issue



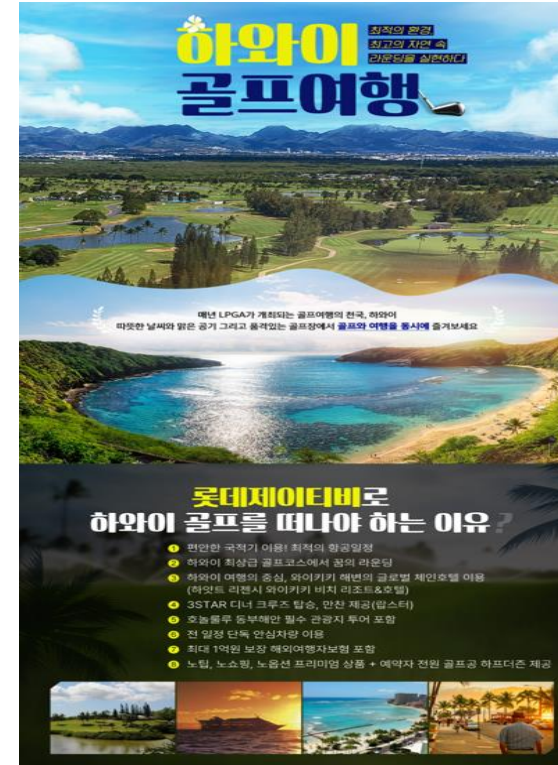
YTD Review (Jan – Aug)

Hawai'i Golf Promotion



Hawai'i Golf Social Event on HTK's Instagram

- **Promotion period:** April 11 - 15
- **Result**
 - ✓ Event page total clicks: 3,814
 - ✓ Total lucky winners: 10



Lotte JTB - Hawai'i Golf Promotion

- **Promotion period:** May – June
- **Result**
 - ✓ Hawai'i golf special page unique views: 122,000
 - ✓ Hawai'i golf product ads banner clicks: 172,500
 - ✓ Total sales no. of pax: 232pax



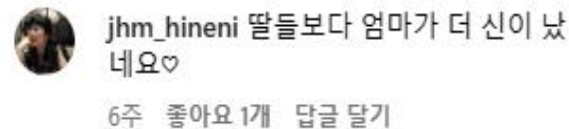
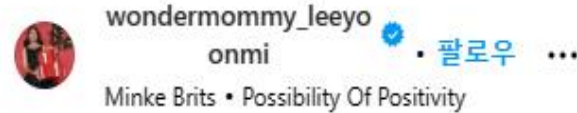
Influencer Couple's Individual FAM



YTD Review (Jan – Aug)

- **Travel Period:**
June 15-18: Hawai'i Island
June 18-20: Maui
June 20-22: O'ahu
- **Influencer Couple: Mickey Kim & Susie Lee**
 - ✓ @Mickey.Kim (91k followers)
 - ✓ @Susie_lee_ (11k followers)
- **Result:**
 - ✓ Total 8 posts & reels on Instagram
 - ✓ Total impressions
Mickey.kim: 352,452
Susie_lee_: 82,332
 - ✓ Total engagement
Mickey.kim: 9,246
Susie_lee_: 2,841

Celebrity Influencer Family FAM



YTD Review (Jan – Aug)

- **Travel Period:**
June 14-19: Hawai'i Island
June 19-25: O'ahu
- **Korean actress & social influencer Lee Yoon-mi**
 - ✓ Instagram @wondermommy_leeyoonmi/
 - ✓ Followers: 136k
- **Result:**
 - ✓ Total 25 posts
 - ✓ Total impression: 1M+



YTD Review (Jan – Aug)

Hawai'i Honeymoon Campaign



Honeymoon Resort – Mālama Honeymoon Promotion

- No. of YouTube video contents: 4
- YouTube Google Ads impressions: 42,297
- YouTube Google Ads hits: 18,963
- Keyword impressions/clicks: 3,041,630 (impressions)/12,586 (clicks)
- Total sales: 2,060pax



Kaltour – Sweet Hawai'i Promotion

- Sweet Hawai'i promotion page clicks: 3,250
- Newsletter distribution: 54,048
- KakaotalkBizTak impressions: 95,683
- Naver Banner Ads impressions/clicks: 3,265,966 (impressions)/10,514 (clicks)
- Total sales: 273pax



Media/Influencer FAM

YTD Review (Jan – Aug)



eenomsiki
Waikiki, Honolulu, Ohau

...



eenomsiki “오직 하와이에서만, 하와이여서 열릴 수 있는 축제 2가지”

낭만가 즐길거리가 가득한 곳,
하와이 와이키키 거리가 이맘쯤 유독 들쭉이는 이
유는
매년 단 하루만 열리는 로컬 축제의 덕도 크다.

오직 하와이에서만, 그리고 하와이니까 열릴 수 있
는
두 가지 축제를 함께 소개해 본다.

-



- **Travel Period:**
April 26-28: Maui
April 28-May 2: O‘ahu
- **Participants:** 2 editors from Chosun Ilbo and Maeil Business Newspaper, 2 travel photographer / influencers, 2 HTK staff
- **Result:**
 - ✓ Media: total 4 on/offline media articles, 4 video posts
 - ✓ Influencers:
@Bongtographer (43k followers): 8 posts
@Eenomsiki (33k followers): 6 posts
 - ✓ Total impressions:
Bongtographer: 25,479
Eenomsiki: 25,075

'Ono Hawai'i Campaign with SSG.COM



Aloha! 하와이를 소개합니다

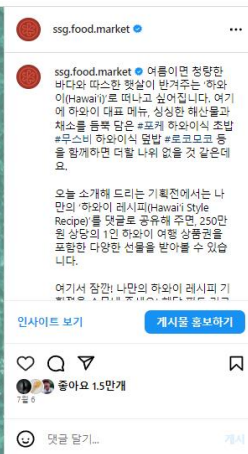
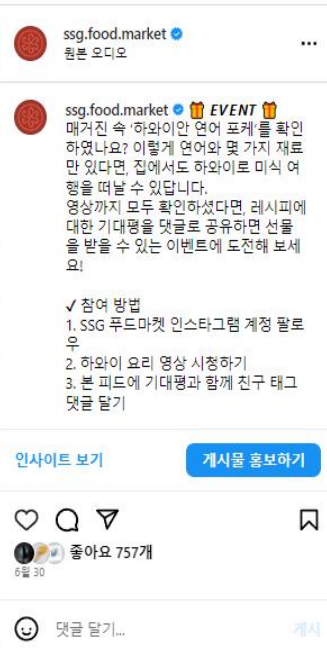


하와이 음식 둘러보기



댓글 쓰고 경품 응모 하기!

하와이 여행권부터
시원한 여름음료까지 혜택가득



YTD Review (Jan – Aug)

- **'Ono Hawai'i Recipe Anticipation Event**
 - ✓ Channel: SSG.com's official Instagram
 - ✓ Number of entries: 140
- **'Ono Hawai'i Main Event**
 - ✓ Channel: SSG.com's main promotion page
 - ✓ Page View: 11,441
 - ✓ Number of participants: 272
- **Instagram Event to Spread the Main Event**
 - ✓ Channel: SSG.com's official Instagram
 - ✓ Number of participants: 1,300

Future Plan (September – December)

Future Plan (Sept – Dec)

Hawai'i Travel Mission

- **Target audience:** Hawai'i Industry Partners, Korea Travel Trade Partners and Trade Media
- **Objectives:** provide multiple opportunities to connect Hawai'i industry partners with Korea's leading travel trade players through business meetings and networking
- **Timeline:** October 11 -13
- **Program components:** Aloha VIP reception, Hawai'i Destination Seminar, Hawai'i travel mart
- **Participation fee:** \$2,000 for one delegate and an additional \$500 charge for the second delegate
- **How to Sign Up:** <https://bit.ly/htmkorea2023>
- **Projected outcomes:**
 - ✓ More than 100+ travel partners' participation
 - ✓ More than 10+ travel mart meetings per participating company



HTK Register QR Code

Future Plan (Sept – Dec)

Mālama Hawai'i Branding Campaign

- **Target audience:** mindful travelers
- **Timeline:** September - December
- **Program components:** Advertising campaign, owned channel utilization, social media events, trade roadshow
- **Projected outcomes:**
 - ✓ Ad Value of \$220,000 from media coverage and engagement
 - ✓ Offline consumer reach, social media engagement value of \$200,000 and minimum of 1K increase in HTK IG followers
 - ✓ Increased number of Hawai'i visitors who understand and support Mālama Hawai'i



Future Plan (Sept – Dec)

Airline Co-op

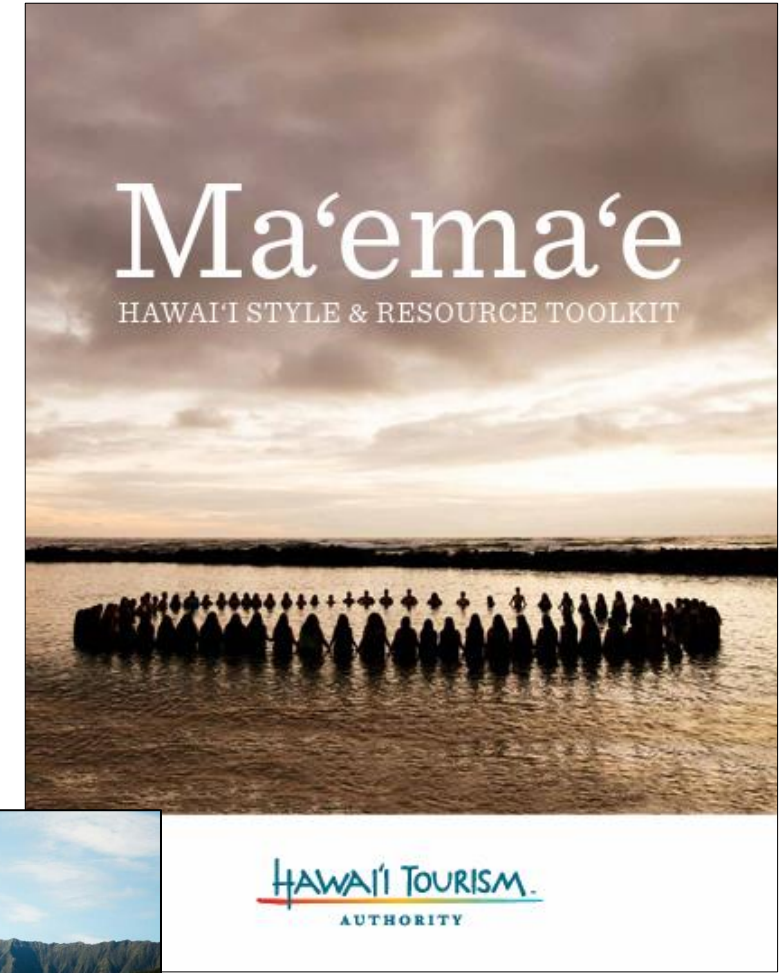
- **Target:** mindful travelers
- **Timeline:** September - December
- **Program component:** develop tailored consumer and sales promotion/campaign that fits each airline's target market
- **Projected outcomes:**
 - ✓ increased ticket sales on airlines' ICN-HNL routes and spreading Mālama messages



Future Plan (Sept – Dec)

Hawai'i Travel Content Refresh Campaign

- **Target:** trade partners
- **Timeline:** September - December
- **Program component:**
 - ✓ Translation: translate into Korean the brand story of the Hawaiian islands and Ma'ema'e tool as online assets
 - ✓ Distribution: share content with trade partners through educational programs
- **Projected outcomes:** more than 500 travel agents in Seoul and Busan will receive the Hawai'i travel updates



HAWAII TOURISM
AUTHORITY

Future Plan (Sept – Dec)

Premium Travel Promotion with Travel Agents

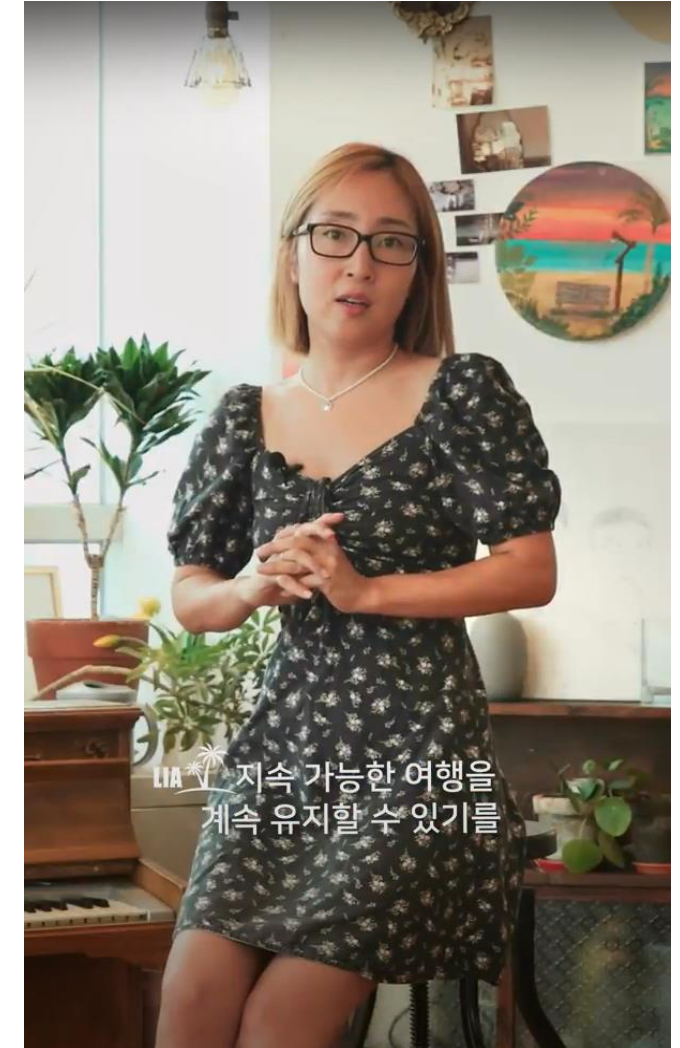
- **Target:** high-value travelers, wellness seekers, honeymooners
- **Timeline:** September - December
- **Program component:**
 - ✓ Educate travel agents on attractions and programs that create a memorable tourism experience in the Hawaiian Islands
 - ✓ Work with travel agents to develop Hawai'i premium travel products and conduct promotions through travel agent channels
- **Projected outcomes:** develop premium package travel products for Hawai'i



Future Plan (Sept – Dec)

#StoriesOfMalama Digital Campaign

- **Target:** FIT and SIT travelers
- **Timeline:** September - December
- **Program component:**
 - ✓ Encourage Korean consumers to share and post their best travel moments and experiences of aloha and mālama spirit using the hash tag campaign #StoriesofMalama
 - ✓ Use social media channels to provide Mālama Hawai'i videos and tailored consumer messages
- **Projected outcomes:**
 - ✓ Minimum PR/EPR Value of \$150,000 from reach and engagement on social media channels



PARTNERSHIP OPPORTUNITIES

PARTNERSHIP OPPORTUNITIES

ACTIVITY	DATE	DESCRIPTION	LOCATION	COST	Person in Charge
TRAVEL SHOWS					
Hawai'i Travel Mission	OCT 11-13	HTK will provide multiple opportunities to connect Hawai'i partners with Korea's leading travel trade players through business meetings and networking.	Seoul, Busan	<ul style="list-style-type: none"> •Participation fee \$2,000 for one delegate and an additional \$500 charge for the second delegate •Door Prize 	Jin Jang Account director Email: jinjang@aviareps.com
ANTOR Busan Roadshow	OCT 25	HTK will participate in a trade roadshow organized by ANTOR (Association of National Tourism Organization Representatives) to deliver Mālama Hawai'i and Kuleana travel information to travel agencies in Busan.	Busan	In-kind sponsorships for prizes: <ul style="list-style-type: none"> •Accommodations •Hosted Meals •Activities •Transportation •Airfares •Made in Hawai'i products 	Jin Jang Account director Email: jinjang@aviareps.com
TRADE FAMILIARIZATION TRIPS (FAMS)					
Educational Trade FAM Tour	Q4	HTK will invite selected participants from top agencies in Korea to the Hawaiian Islands to learn about the destination in deeper dive.	O'ahu + Neighbor Island	In-kind sponsorships: <ul style="list-style-type: none"> •Accommodations •Hosted Meals •Activities •Transportation •Airfares 	Jin Jang Account director Email: jinjang@aviareps.com
PUBLIC RELATIONS					
Mālama Hawai'i Media and/or Influencer FAM	Q3	HTK will invite leading media and Influencers to create premium profile of Hawai'i content to be published on social channels, online and print magazines.	O'ahu and Neighbor Island	In-kind sponsorships: <ul style="list-style-type: none"> •Accommodations •Hosted Meals •Activities •Transportation •Airfares 	Jinny Assistant Manager Email: jinnychoi@aviareps.com

PARTNERSHIP OPPORTUNITIES

ACTIVITY	DATE	DESCRIPTION	LOCATION	COST	Person in Charge
PUBLIC RELATIONS					
Made in Hawai'i Individual Influencer FAM	OCT/NOV	HTK will invite gourmet influencers to 2023 Hawai'i Food and Wine Festival to create Hawai'i culinary and Made in Hawai'i contents.	O'ahu	In-kind sponsorships: <ul style="list-style-type: none">•Accommodations•Hosted Meals•Activities•Transportation•Airfares	Jinny Assistant Manager Email: jinnychoi@aviareps.com
CONSUMER PROMOTION					
#StoriesOfMalama Digital Campaign	Q3	HTK will conduct a hashtag campaign named #StoriesOfMalama to promote the Hawaiian Islands. The campaign aims to introduce a variety of Made in Hawai'i products and deliver the message of mālama to the Korean market.	All Islands	In-kind sponsorships: <ul style="list-style-type: none">•Interview with local business owners•Hosted Meals	Jinny Assistant Manager Email: jinnychoi@aviareps.com
Social Media Consumer Events	Q3/Q4	HTK will hold a Mālama Hawai'i themed online consumer event to enhance the awareness of Mālama Hawai'i.	Korea	In-kind sponsorships: <ul style="list-style-type: none">•Accommodations•Hosted Meals•Activities•Transportation•Airfares•Souvenir•Collateral fulfillments or productions•Made in Hawai'i products	Jinny Assistant Manager Email: jinnychoi@aviareps.com

An aerial photograph of Seoul, South Korea, taken at dusk. The city is densely packed with buildings, and the lights of the city are beginning to glow. In the background, the N Seoul Tower is visible on a hill. The sky is a mix of deep blue and orange from the setting sun. The text 'MAHALO!' is overlaid in the center in a large, white, sans-serif font.

MAHALO!

Kamsa-hap-nida!