



2026 Brand Marketing Plan - Korea

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Country Director

KOREA IN 2025

Amid political transition and social optimism, Korea enters 2025 with a revitalized outlook and growing momentum.



Post-Election Stability

Political stability is helping restore public confidence and support broader economic recovery.

Confidence Upturn

Consumer sentiment is on the rise, reflecting renewed optimism and easing political uncertainty under the new administration.

Strengthened Travel Sentiment

Travel intent remains strong, driven by improved consumer confidence and a sustained return to experience-focused spending.

KOREA MARKET OVERVIEW



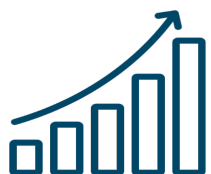
51.7M

**POPULATION
IN 2025**

(Source: Korean Statistical Information Service)

2ND **RANKED PASSPORT**

(Source: MCST)



17M

**OVERSEAS TRIPS
IN JAN – JUL 2025
(2.5% YoY Increase)**

(Source: Korea Tourism Organization, KTO)

1.0%

**ECONOMIC GROWTH FORECAST
IN 2025**

(Source: OECD, 2025)

1,350 – 1,400
KRW/USD

**EXCHANGE RATE
OUTLOOK**

Stable Exchange Rate,
Supports U.S. Travel

(Source: Bank of Korea)

\$41

**FUEL SURCHARGE IN SEP 2025
(29% Decrease vs. Sep. 2024)**

(Source: KE, OZ, HA, YP websites)

WHAT'S DRIVING KOREAN TRAVELERS IN 2025

Wellness & All-Inclusive

- 44% prefer all-inclusive packages
- 61% prioritize wellness and retreats in travel plans
- Rising demand for wellness-focused itineraries and healthy diet

Sports Themed Travel

- 48% Korean travelers aged 25-34 are planning trips around sports events in 2025

Authentic Experiences

- 73% visit local markets when traveling
- 69% prioritize nature-based experiences
- 48% Gen Z values immersive cultural activities

Digital & AI Influence

- Mobile booking reached 42.8% of total
- 68% influenced by social media content
- 20% now using AI for personalized itineraries

KOREAN TRAVEL BEHAVIORS

Travel Type



32%

Free
Independent
Traveler (FIT)



26%

Private
Group
Package



21%

Semi-
Package
(Air + Hotel)

Travel Companion

49%

Family

30%

Friends &
Couple

15%

Solo

Travel Accommodation Info Channels

29%

Travel Product
Purchase Channel

28.1%

Travel Info
Sites/Apps

27.4%

Naver Blogs

Main Travel Purpose

Relaxation

49%

To enjoy good food and drink

45%

City Exploration

44%

Travel Intentions

69%

69% plans to
travel
overseas
this year

Overseas Travel Planning Info Channels

YouTube

35.1%

Naver Blog

33.1%

Recommendation/Word of mouth

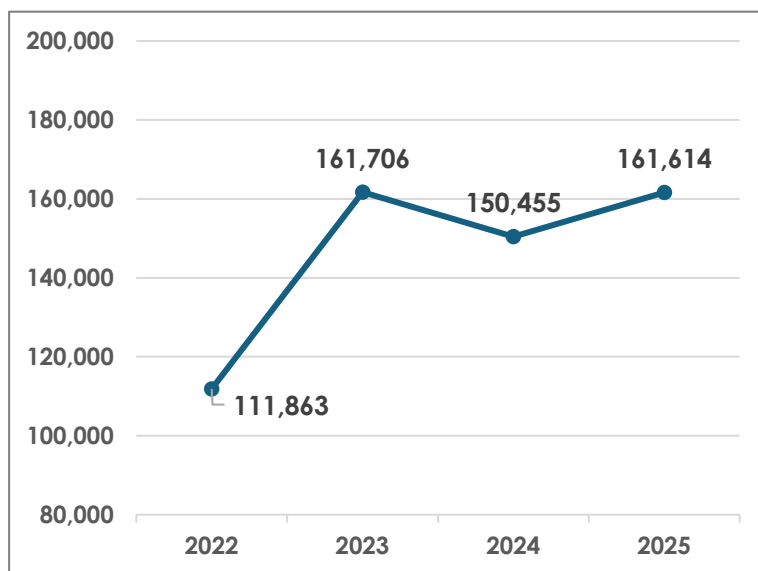
20.4%

TV

16.3%

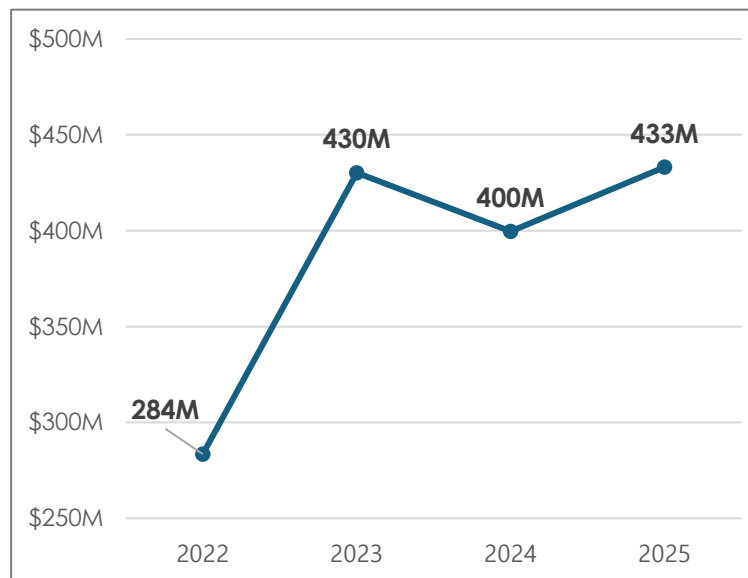
KOREAN TRAVEL & SPEND

Korean Travelers to Hawai'i



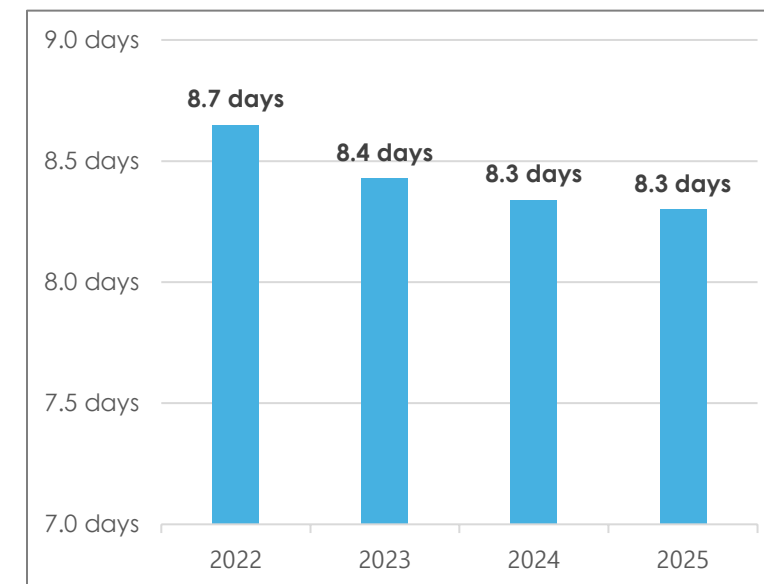
- 71% recovery of the pre-pandemic level
- +7.4% vs. 2024
- Growth supported by YP launch in July & OZ's daily service from June to August

Spending by Korean Travelers



- 87% recovery of the pre-pandemic level
- +8.3% vs. 2024
- PPPD Spending projected at US\$322.9 in 2025, up 13% from 2019

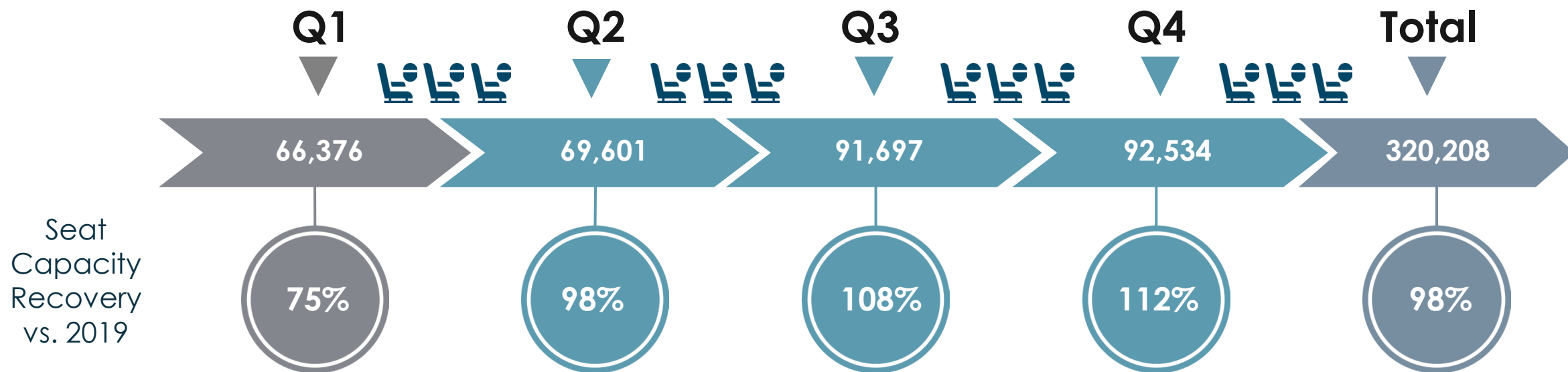
Length of Stay in Hawai'i



- Average length of stay: 8.3 days
- +9.2% vs. 2019 (7.6 days)

AIRLIFT TO HAWAII

98% Recovery of Pre-Pandemic Seat Capacity



Total Flights From
Korea (1,054)
vs. 2024 (923)

**14.2%
Increase**

Total Seats From
Korea (320,208)
vs. 2024 (278,982)

**14.8%
Increase**

SEOUL ✈ HONOLULU

18x Nonstop Service From Dec 2025, 16x From Mar 2026

Airlines	Frequency	Seats (Capacity)
 KOREAN AIR	7 Weekly	291 Seats (B787-10)
ASIANA AIRLINES	5 Weekly	301 Seats (B787-200ER)
 AIR PREMIA	4 Weekly to 6 Weekly (Dec 15, 2025 – Feb 22, 2026)	309 Seats (B787-900)

2026 BRAND MESSAGE

ALL WAYS HAWAI'I

Position Hawai'i as an endlessly inspiring, multi-island destination offering diverse cultural, natural, sports, and culinary experiences



ALL WAYS HAWAII BRAND STRATEGY



Comprehensive Appeal

Position Hawaii'i as a multi-island destination offering diverse cultural, natural, sports, and culinary experiences



Showcase Versatility

Highlight the many ways to explore, enjoy, and connect



Dual Meaning

Build timeless appeal through the dual nuance of All Ways and Always

- All Ways = Diverse Experiences
- Always = Timeless Inspiration



Brand Identity

Strengthen with a unified, multidimensional message

TARGET AUDIENCE PROFILE

Primary focus – high value, mindful Korean travelers from Seoul Metropolitan Area and Busan-Gyeongnam Area with:

- Household incomes of \$70,000+
 - Double incomes exceeding \$100,000
 - Interest in premium experiences and cultural immersion
 - Tendency to plan and research extensively before booking
-
- Mainstreamers (20s – 60s)
 - Romantic Couples (20s – 60s)
 - Affluent Travelers (40s – 70s)
 - Outdoor Goers (20s – 60s)
 - Free Independent Travelers (FIT) (20s – 40s)



ALL WAYS HAWAII CAMPAIGN (PART 1)

Signature Travel Promotion

- Develop signature festival/event travel products with trade partners
- Engage consumers with festival-focused content and campaigns to highlight Hawai'i's unique cultural experiences
- Collaborate with Korean fitness influencers in neighbor island marathons to showcase natural beauty and communities

Mindful Travel Promotion

- Collaborate with trade partners to promote mindful travel rooted in cultural appreciation, nature preservation, and community respect
- Host media fam tours to highlight regenerative tourism
- Partner with conscious brands to engage consumers through initiatives on zero-waste, ethical consumption, and community engagement

Made-in Hawai'i Promotion

- Partner with retail and F&B brands to showcase Made in Hawai'i and Hawai'i-inspired products, creating engaging consumer events and digital campaigns that foster emotional connections to Hawai'i



Objective

Position Hawai'i as "Always Inspiring, Always Hawai'i" — a multi-island destination of endless culture, nature, sports, and flavors.

ALL WAYS HAWAI'I CAMPAIGN (PART 2)

The Hawaiian Islands Promotion

- Strengthen trade/media ties through Travel Mission Korea & IPW 2026
- Organize neighbor island fam tours with airlines to enhance offerings for repeat and long-stay travelers
- Enhance expertise via webinars, roadshows, and Hawai'i Specialist Program
- Generate inspiring content with KOL digital fam tour
- Run #AllWaysHawai'i campaign to spotlight culture, nature, and regenerative values

AI Travel Promotion

- Develop AI-customized travel products with OTA partners
- Host "Aloha Through AI" event to engage young consumers with trip giveaways



Expected Outcomes:

- ✓ Engage 200+ travel partners and host 30+ business meetings during HTM and trade roadshow
- ✓ Certify 20+ Hawai'i Specialists and deliver 2+ seminars with 100+ participants each
- ✓ Generate 1.8M+ media impressions
- ✓ Achieve 270K+ impressions and 80 posts via owned social media
- ✓ Attract 800+ attendees through consumer activation initiatives
- ✓ Produce 20+ KOL contents generating 200K+ impressions

YOUR ONE&ONLY HAWAI'I CAMPAIGN (PART 1)



Objective

Position Hawai'i as the premier destination for premium and romantic travel, offering high-end accommodations, exclusive activities and services

Premium Travel Promotion

- Boost ticket sales and high-value spending with airlines and premium shopping partners
- Develop all-inclusive long-stay products for affluent seniors
- Partner with credit card companies to target platinum cardholders with exclusive Hawai'i benefits
- Promote the Lotte LPGA Championship and host a KOL golf tour to showcase Hawai'i's golf experiences
- Collaborate with luxury brands, connecting culture, wellness, and premium experiences to reinforce Hawai'i as a premier travel destination.

YOUR ONE&ONLY HAWAI'I CAMPAIGN (PART 2)

Romance Travel Promotion

- Co-op with honeymoon specialty agencies to promote romance products
- Host romance fam tour with trade and planners to develop diverse products, including premium stays, wedding venues, and couple activities
- Integrate romance-themed content into media to position Hawai'i as an aspirational couple destination
- Co-op with influencers to create digital content that builds emotional connections and reinforces Hawai'i as the ideal place to celebrate love



Expected Outcomes:

- ✓ Generate 1.2M+ impressions through travel media channels
- ✓ Secure 20+ digital media placements via romance program integration
- ✓ Achieve 100K+ impressions via influencer collaborations
- ✓ Enhance brand visibility and inspire high-value travelers with aspirational content

PARTNERSHIP OPPORTUNITIES

Contact: HTK@aviareps.com

- Hawai'i Specialist Training Program
- Hawai'i Travel Mission in Seoul
- Neighbor Island Digital KOLs Fam Tour

- Neighbor Islands Trade Familiarization Tour
- Hawai'i Specialist Training Program

Q1

1

2

Q2

- Mindful Travel Fam Tour with Daily News Media
- Romance-themed Digital Content Creation with Influencers

Q3

3

4

Q4

- KOL Golf Fam Tour
- Romance Trade Fam Tour

KEEP CONNECTED WITH HTK



Sunny Lee



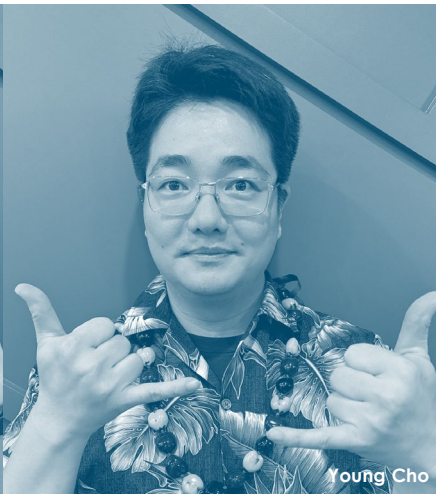
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