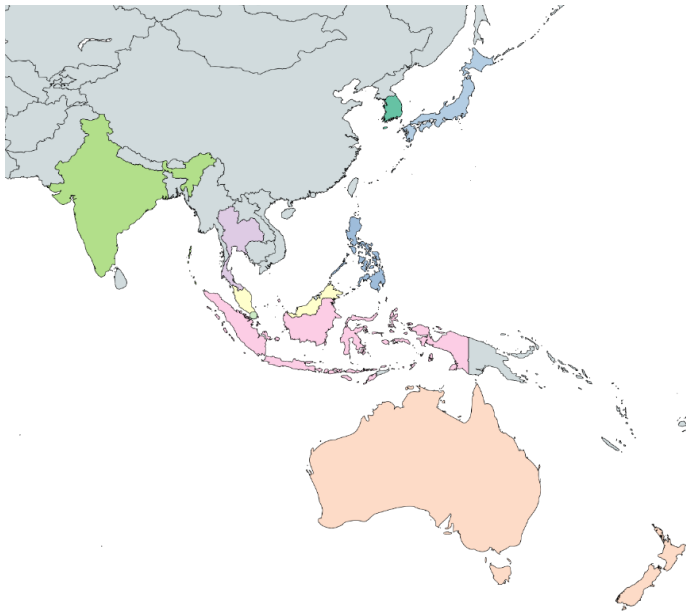


Seminari Japó i Corea del sud 3 de desembre de 2024

ÍNDEX

- 1. El CPT APAC i el seu equip**
- 2. Els mercats APAC**
- 3. Connectivitat**
- 4. Balanç 2024/2023**
- 5. Tendències a Japó i Corea del Sud**
- 6. Intermediació**
- 7. Ecosistemes**

1. CPT APAC

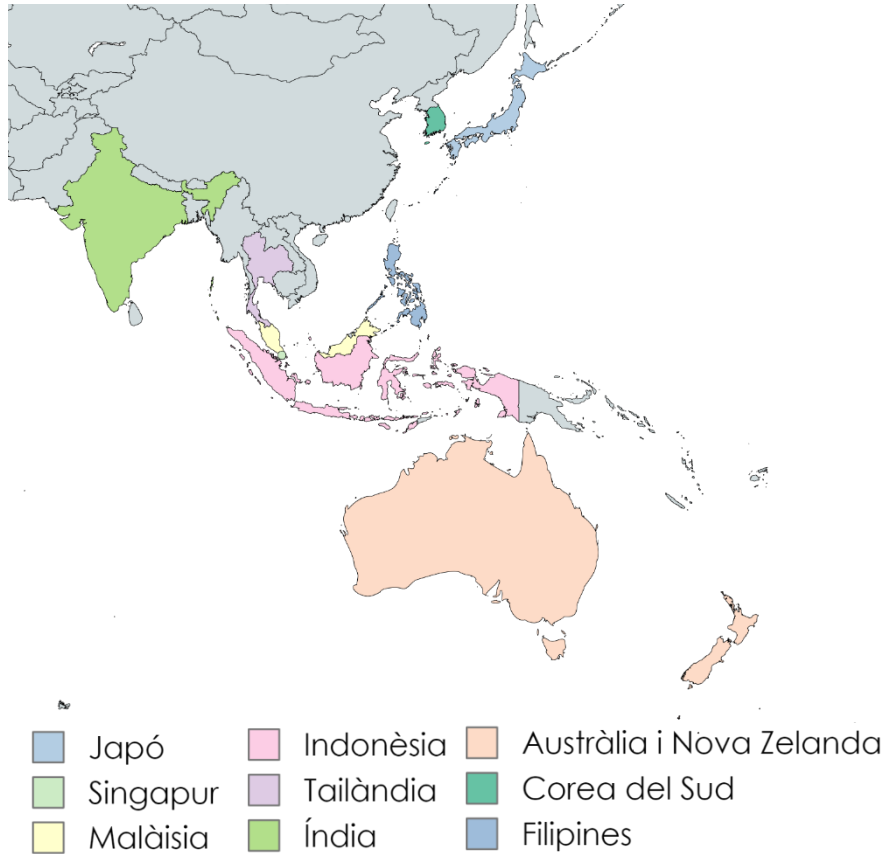


- | | | |
|------------|-------------|----------------------------|
| ■ Japó | ■ Indonèsia | ■ Austràlia i Nova Zelanda |
| ■ Singapur | ■ Tailàndia | ■ Corea del Sud |
| ■ Malàisia | ■ Índia | ■ Filipines |

Raül Guerra – Director CPT APAC (Tòquio)
Kumiko Aso – Marketing Executive (Tòquio)
Veronica Tan – Marketing Executive (Singapur)
Eun Byul Cheon – Marketing Executive (Seül)



2. Mercats APAC



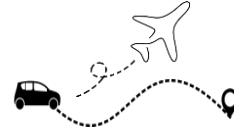
Situació socio- econòmica

Mercat	Població en milions (2023)	PIB (2023) bilions USD	% Inflació (2023)	Taxa atur (2023)	Tipus de canvi vs €
Japó	125,1	4,2	3,3	2,6%	Feble
Corea del Sud	51,6	1,7	3,6	2,6%	Feble
Austràlia	26,0	1,7	5,6	3,6%	Feble
Singapur	5,9	0,5	4,8	1,8%	Feble
*Resta SEA	1.912,6	6,3	5,0	6,5%	Feble

Font: 2023 World Population Data Sheet, World Economic Outlook, local Govt Financial Reports ,OECD, Grupo Banco Mundial, Power BI (Mirai)

*Resta SEA: Les Filipines, Malàisia, Indonèsia, la Índia i Tailàndia extret de World Bank 2024: [Data for Indonesia, Malaysia, Thailand, Philippines | Data](#)

3. Connectivitat



Connectivitat i anticipació

Via d'entrada
Avió (%)

Antelació de reserva
de l'hotel (dies)

• Japó:	97%	55,6
• Corea del S:	99%	70,7
• Austràlia:	75%	83,7
• Singapur:	94%	64,9
• Resta SEA:	85%	48,3



Ciutats connectades - noves rutes i freqüències

Seül-Incheon:

- Asiana Airlines, 5/set
- T'way, 3-4/set (25 nov-29 mar 2025)
- Air Premia: 2/set

Singapur:

- Singapur airlines: 5/set (2 directes i 3 via Milà)
- Temporada d'estiu 2025: 5/set sense parada tècnica a Milà

Mitjà orient amb Bcn:

- Etihad (Abu Dhabi): 11/set
- Emirates (Dubai): 9/set
- Qatar (Doha): 21/set
- Turkish (Istanbúl): 23/set

Nou vol Narita-Madrid obert el 27 d'octubre 2024 amb DII, Dv, Dg / 3 vols setmanals

4. Balanç 2023 i 2024

Balanç 2023/2024



Les 4D's



Mercat	Arribades 2023	Arribades (v. Interanual 22/23)	Despesa 2023 € pers/dia	Despesa (v. Interanual)	Grau estacionalització	Estada mitjana*
Japó	181,8	+209,0%	467,3	+88,1%	35,2%	2.8 nits
Corea del Sud	325,6	+206,7%	396,8	+13,3%	18,0%	3.2 nits
Austràlia	264,0	+127,3%	622,7	+43,4%	63,4%	3.3 nits
Singapur	28,7	+12,6%	n.d.	n.d.	29,3%	3.2 nits
Resta del SEA	211,1	n.d	244,5	n.d	38,8%	2.7 nits

Visitor persona

- Cultural pur
- Foodie
- Food & wine lover
- Ecoturista
- Premium

Principals marques turístiques

- Girona-Costa Brava
- Costa Daurada
- Paisatges de Barcelona
- Barcelona

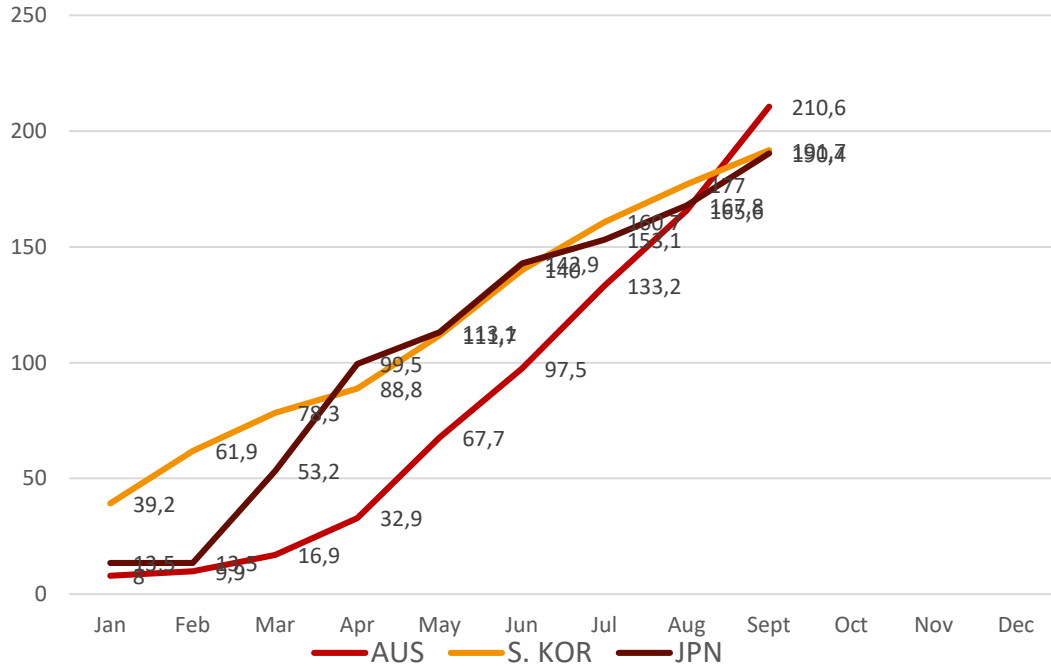


Principals productes d'interès

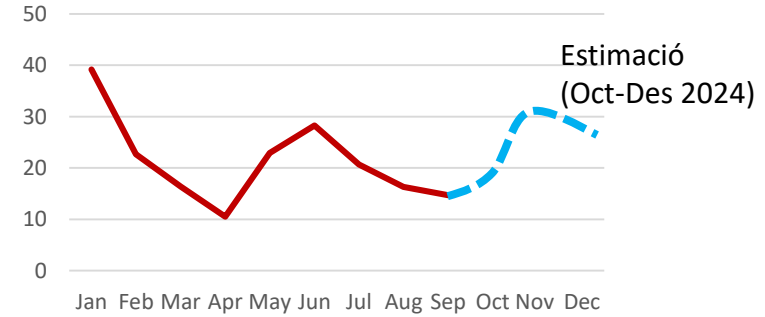
- Gastronomia
- Art, cultura i història
- Gaudi dels espais naturals

Situació a 2024

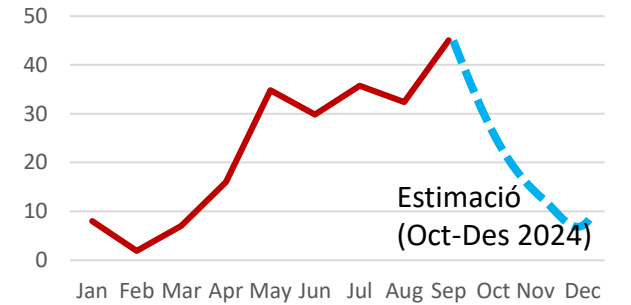
Acumulat Arribades a Catalunya 2024 (milers/mes)



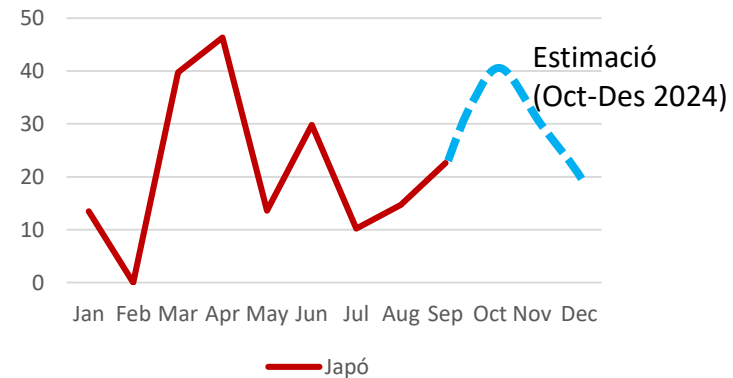
2024 South Korean Arrivals



2024 Australia Arrivals



2024 Japan Arrivals



5. Tendències

Grau intermediació i principals agents intermediaris

- **Corea del Sud** – Alta intermediació, grups grans. Destacar les OTA, les XXSS/SuperApp
- **Japó** – Alta intermediació, creixen els FIT. Destacar les OTA's, les XXSS/SuperApp

Tendències

- Els mercats es recuperen progressivament
- La conjuntura macro-econòmica condiona
- Poder de decisió en mans de les dones
- Les SuperApps a cada mercat
- Aplicacions de la IA ja en marxa
- Influencers sí, però els adequats

Intermediaris - Japó

OTAs

- Jalan
- Airtrip
- Rakuten Travel
- Ikkyu
- Expedia

AAVV tradicionals

- JTB
- HIS
- KNT-CT
- Hankyu
- NTA

Boutique / concierge

- JTB Global Assistance
- American Express Travel
- CRIL Management
- ARKADEAR (Novetat)

Activitats

- Veltra
- KKday
- Rakuten
- GetYourGuide

Meta-cercadors

- Google Travel
- Skyscanner
- Travelko (tour.ne.jp)
- Travel.jp
- 4 Travel

XXSS

- LINE
- Youtube
- Twitter
- Instagram
- TikTok

Intermediaris - Corea del Sud

OTAs

- Interpark
- Tidesquare
- Yeomi Travel (New)
- Booking.com
- Expedia

AAVV tradicional

- Hanatour
- Modetour
- Yellow Balloon Tour
- Very Good Tour
- Lotte Tour

Agències Premium

- Chalet Travel and Life
- Zeusworld by Hanatour
- Kalpak
- The Travel&Leisure

Activitats

- My Real Trip
- Klook
- KKday
- Yeogi Eottae
- Airbnb

Meta-cercadors

- Naver
- Yanolja
- Skyscanner

XXSS

- Instagram
- Youtube
- Facebook
- Naver Blog
- Kakao

Super App - Kakao Corea del Sud



Super App - Line Japó

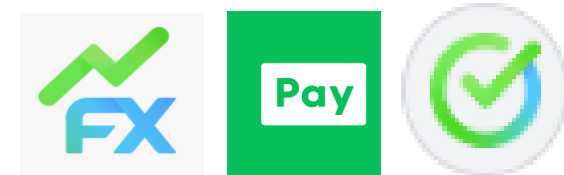
Ús professional



Missatgeria i
Timeline



Finances



Entreteniment

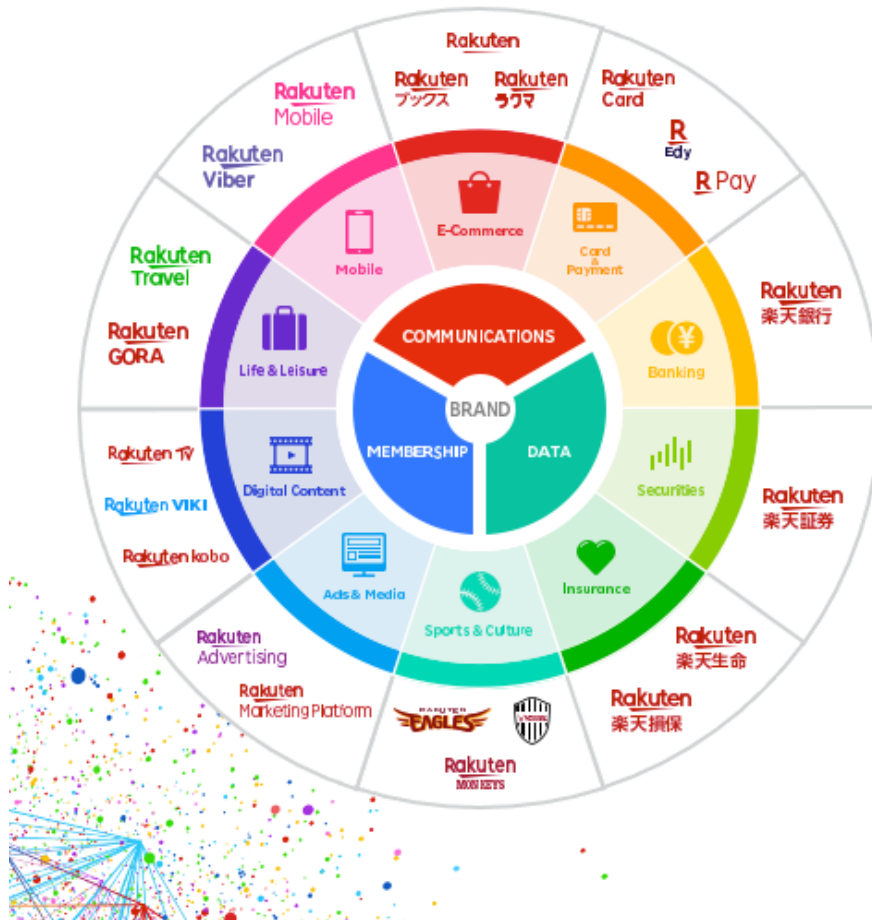


Altres



Ecosistema Rakuten

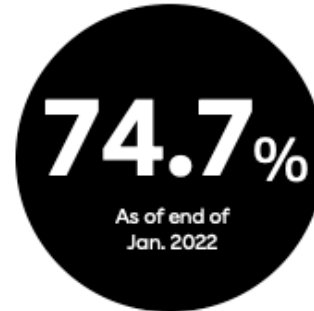
The Rakuten Ecosystem, Centered on Rakuten Points



Number of Rakuten members in Japan



Cross-use ratio



Annual points issued



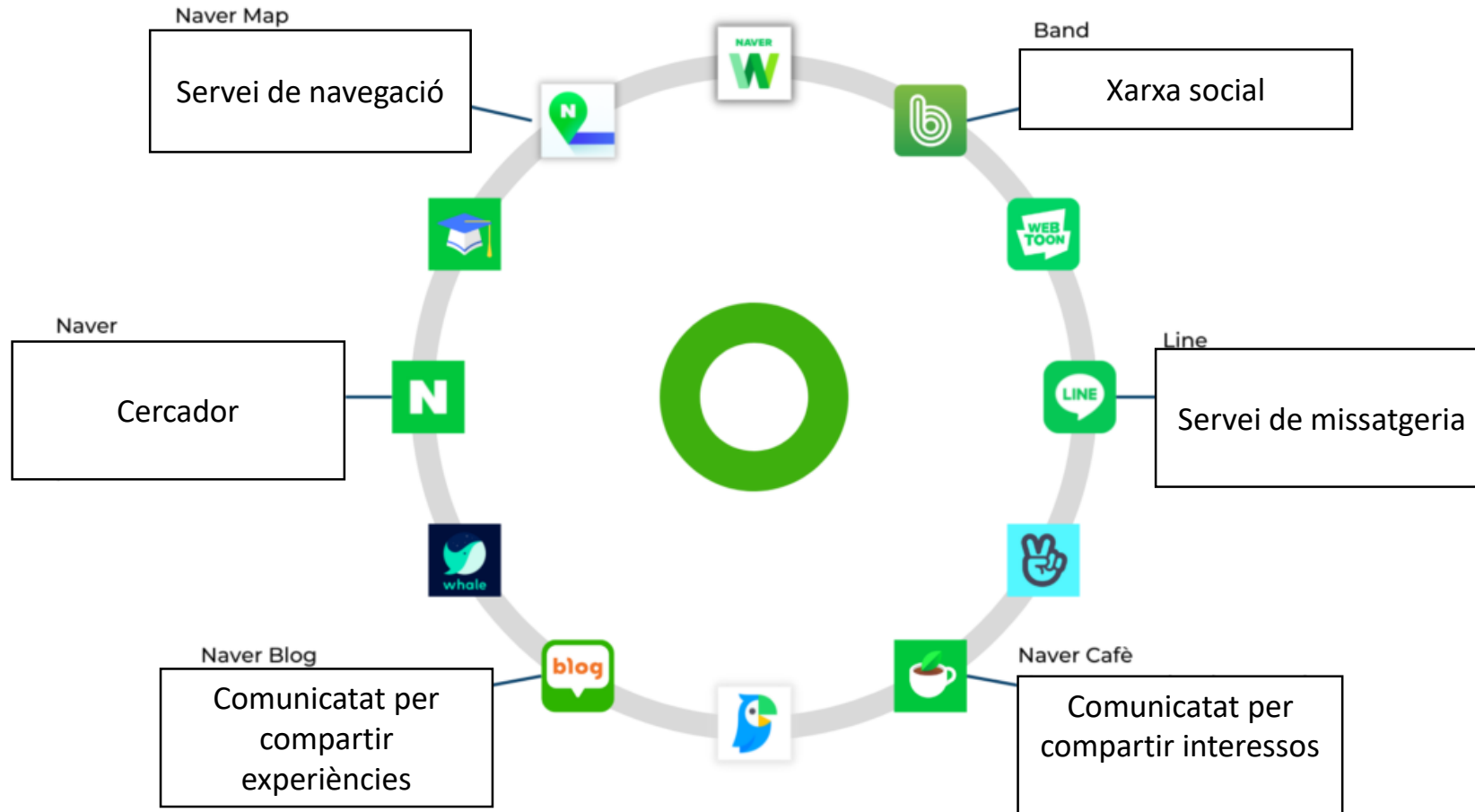
Cumulative number of points issued

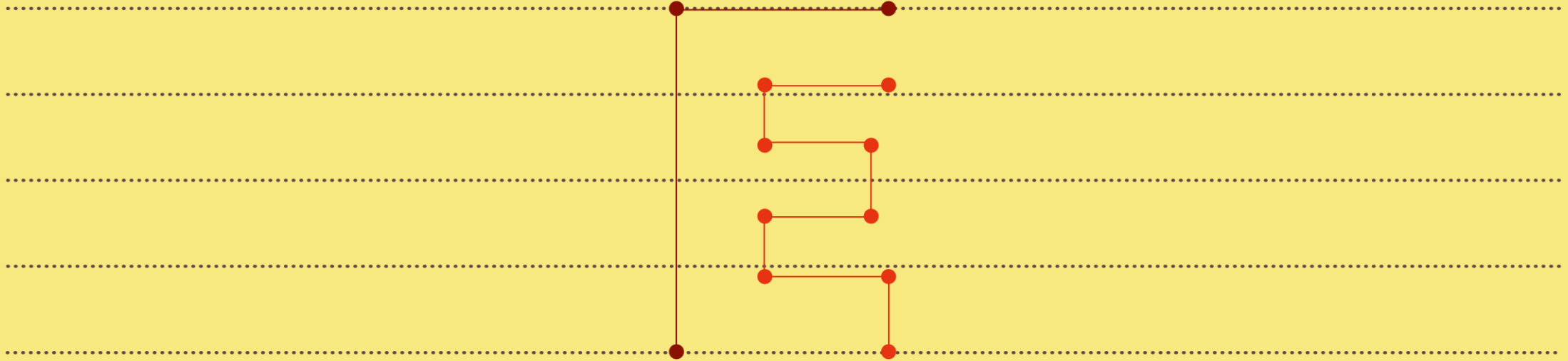


Percentage of points used



Ecosistema Naver





How to Use Social Media in Japan & Korea: Lessons for Travel Brands

2024



Prepared for CTB
by DD

Table of Contents

-
- 0** Objectives & Approach

 - 1** Executive Summary

 - 2** Case Studies: Tourism Board Activity

 - 3** Social Media Market Overview

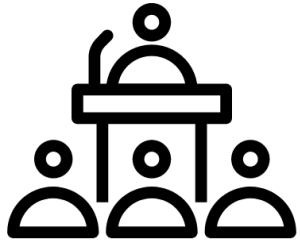
 - 4** Influencer Marketing: The 4 P

 - 5** Summary & Recommendations



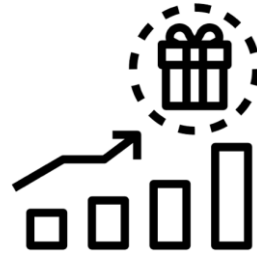
0. Objectives & Approach

0. Approach



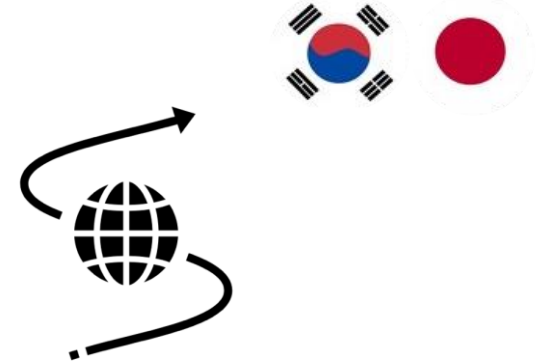
01 Social Media Landscape

To understand the social media landscape in Japan and Korea: channels, user and content trends



02 Influencer Market

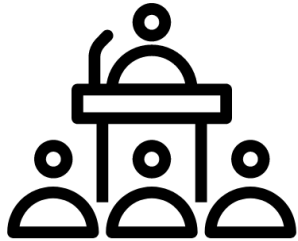
What does the influencer opportunity look like?



03 Tourism Board Activity

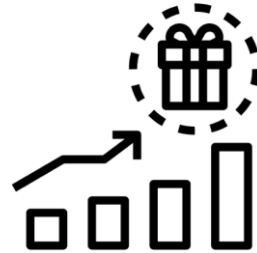
To understand what competitor Tourism Boards are doing in terms of social media campaigns and collaborations with influencers

0. Approach



01 Social Media Landscape

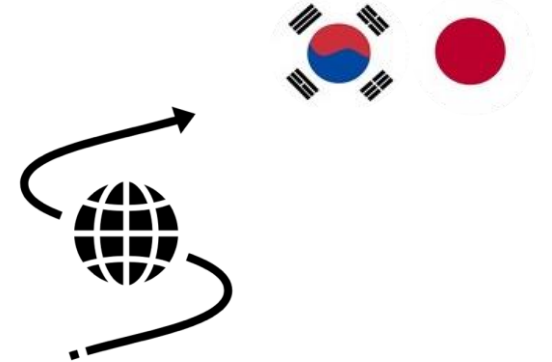
Desk research: articles in the public domain and data



02 Influencer Market

2 interviews x 30 min - one interview in each market with influencer media agency

- Interview with UUUM Japan
- Interview with Collab.Asia Korea



03 Competitor Board Activity

Audit of key competitors per market: analysing campaigns across multiple channels in both markets

A photograph of a crowded train car, overlaid with a semi-transparent red filter. The image shows several people, mostly young adults, sitting and standing. Many are looking at their smartphones. In the foreground, a man with glasses and a black jacket is looking at his phone. To his right, another man with glasses and white earbuds is also looking at his phone. In the background, a woman is holding a yellow Pikachu plush toy. The overall atmosphere is one of a busy, modern public transit environment.

1. Executive Summary

1. Executive Summary



Overall Strategy

You need strategy.
The most successful brands have a consistent approach (more on this later)



Varied but Relevant Content

Important to use varied content, but in line with what people need



Multi-Channel

A multiple-channel strategy delivers better than single.
YT and IG are emerging as the most viable channels across markets and audiences



Not Influencer, but Collaborator

Consider what value each collaborator could bring, but they could be individual influencers, commercial brands or regular travellers (UGC)

A photograph of a crowded train car, overlaid with a semi-transparent red filter. The scene shows several passengers, both seated and standing, focused on their smartphones. In the foreground, a young man with glasses and white earbuds is looking at his phone. Behind him, another man is also looking at his phone. To the left, a woman is holding her phone. The train's interior, including handrails and windows, is visible. The overall atmosphere is one of modern, mobile connectivity in a public transport setting.

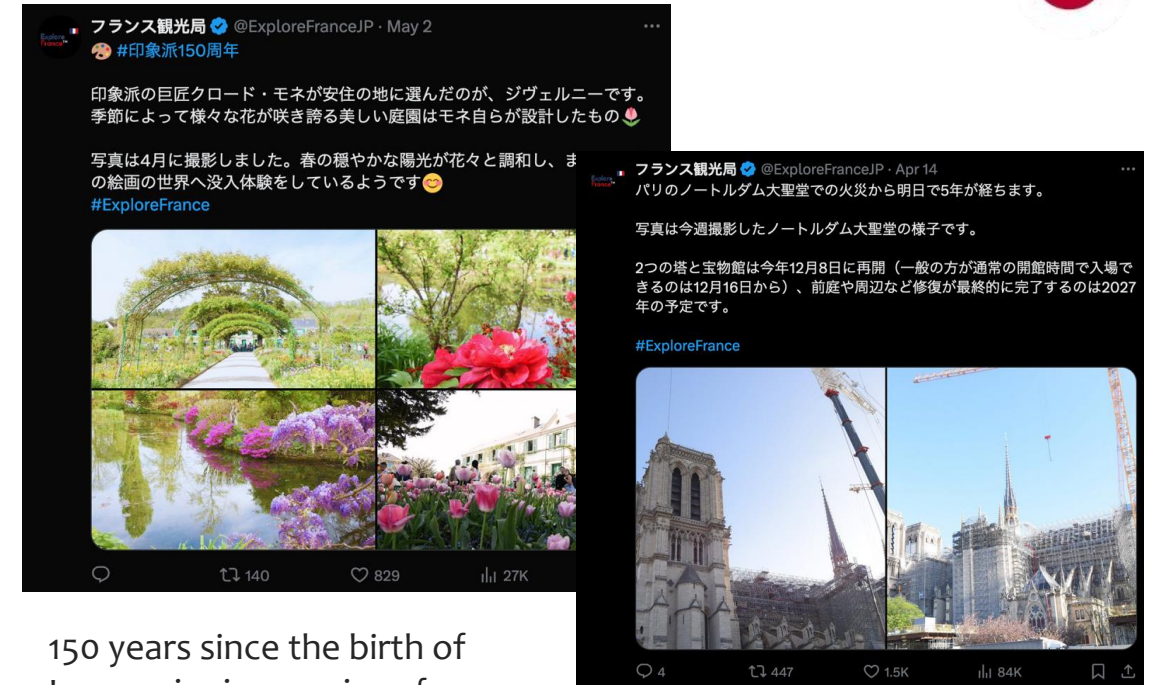
2. Case Studies

4. Case Studies – Explore France

Regular posts:



Most popular posts:

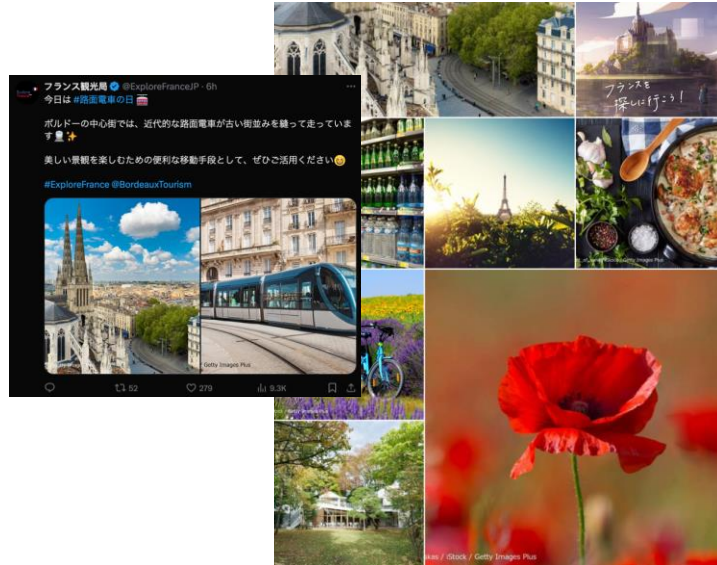


150 years since the birth of Impressionism: series of flower photos from a garden in Giverny designed by Claude Monet

Notre-Dame rebuilding images also, other architecture posts related to Jean Nouvel or Sou Fujimoto designs

4. Case Studies – Explore France

Varied content



- Varied content: scenery, food, art, design, architecture
- Familiar sites
- Topical, celebration of what is happening today

X-centric



- Most active channel is X
- Content is often shared between X and LINE

Brand Partnerships



- No collaborations with individual influencers
- Partnerships with commercial entities:
 - Travel: Klook, HIS
 - Media: *Transit*, *Madame Figaro*
 - Retail: Galleries Lafayette

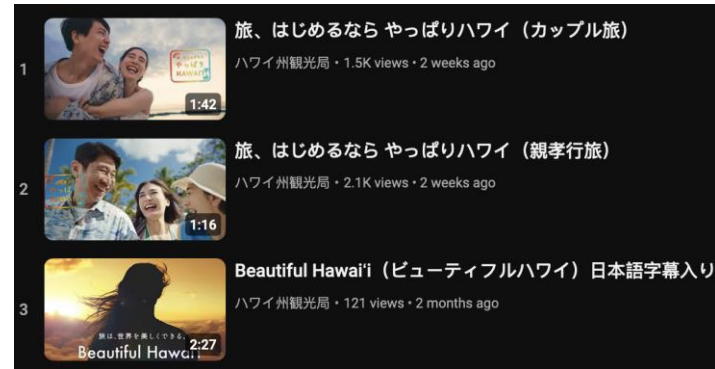
4. Case Studies – Hawai'i Tourism Board

Multi-faceted Content



- Video-heavy; some photos
- Recurring themes: golf, weddings, volcanoes, flowers, hula dancing
- The sea, marine landscapes
- Hawai'i connection with Japan

Multi-Channel



- Video on YT, IG and X: some shared, some exclusive content
- Japanese-language content on multiple channels
- Campaigns running every several months

Food & Lifestyle Brand Partnerships



- No collaborations with individual influencers
- Partnerships with a variety of local and Japanese brands:
 - Food & Alcohol: Honolulu Beerworks, Aloha Beer, Calbee
 - Beauty: Bathclin
 - Travel: Hilton, Hawai'ian Airlines, HIS

4. Case Studies – Hawai'i Tourism Board

- Highlighting the credentials of Hawai'i as a source of quality food and drink, and lifestyle items is important to create an image of a well-rounded and appealing destination
- Also, Hawai'i-inspired Japanese products (e.g. Calbee's Frugra) help to reinforce the connection between the two islands

Some of the most popular posts:



X: HIS Hawai'i and Shinjuku Marui collaborating for Hawai'i themed seminars, workshops and market



X: Promotion for Made-in-Hawai'i Aloha Market at Narita Airport



X: Video promoting the Made-in-Hawai'i Aloha Market at Narita Airport



IG: Aloha Beer launch in Japan, accompanied by chance-to-win campaign

4. Case Studies – German National Tourist Board

Recent popular videos on YouTube feature locations in Germany where the hit Korean drama "Queen of Tears" was filmed.



- The vlogs not only showcase the exact locations from the drama but also offer general tours of the area, including sightseeing, food, shopping, and more.
- The fact that a popular drama was filmed there is what grabs viewers' attention.

- + 1. 상수시 궁전 (Schloss Sanssouci)
- + 2. 아이젤너 다리 (Eiserner Steg)
- + 3. 베벨 광장 (Bebelplatz)
- + 4. 베를린 대성당 (Berliner Dom)

Berlin



Frankfurt



Tour of Sanssouci Palace



4. Case Studies – German National Tourist Board

- “German Jijinhee” influencer: YouTube is her main channel, and uploads short clips on IG and TT
- The videos, filmed without narration and from angles that make viewers feel as if they are traveling themselves, showcase various cities in Germany.




Popular contents show seasonal events:

- Frankfurt Fastnachtsumzug 2024 Carnival (231 views, 115 comments)
- 2023 German Christmas Market Munich (275 views, 70 comments)

4. Case Studies – Tourism Authority of Thailand

IG and FB share similar content, primarily focusing on places to visit and cultural events.

Videos on YT are categorized into 6 themes:



- Introducing places to visit (E.g., restaurants, cafes, spas, bars, shopping spots etc.)
- Cultural events (E.g., Songkran, Thailand BIENNALE Chiang rai 2023, etc.)



Talk about 태국 with Nook & Pink Golf Paradise 태국 지역별 동영상



인플루언서와 함께한 동영상 비디오 클립 컨테스트 언제나 놀라운 방콕

1. Two Thai women (living in Korea) talking about different topics about Thailand
2. Places for golfers
3. Introducing different parts of Thailand
4. Collaborated contents with influencers (E.g., Rozy, global food blogger, Thai living in Korea, etc.)
5. UGC: winning videos clips from a contest
6. Collaborated contents with T'way Air on Bangkok (E.g., food, shopping, activities, festivals, etc.)

4. Case Studies – Tourism Authority of Thailand

Tourism Authority of Thailand’s ambassador – Rozy, a virtual influencer

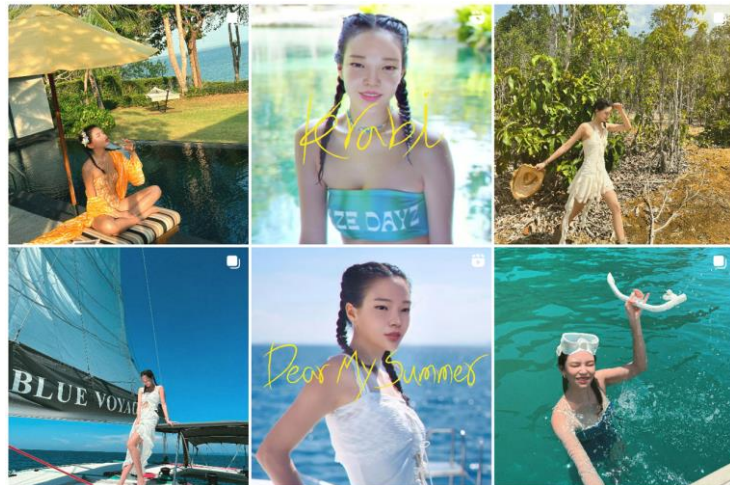


rozy.gram 팔로우 메시지 보내기

게시물 444 팔로워 17.1만 팔로우 4230

로지_버추얼 인플루언서
OH!_ROZY
KOREA'S FIRST VIRTUAL INFLUENCER
I AM THE ONLY ONE, I COULD BE EVERYONE → 🎵
contact@locus-x.com
locus-x.com

IG	@rozy.gram
What	Ambassador of Tourism Authority of Thailand
Who	Virtual influencer
Where (followers)	Accounts in Instagram (170,000)



- On June 28, 2023, the Tourism Authority of Thailand appointed Rozy as their ambassador. Aligning with the summer vacation season, they promoted Krabi, Thailand, with Rozy for three months from July to September.
- Content includes: official PR videos, introducing Krabi and the activities to enjoy in Krabi



로지가 사랑한 끄라비의 호텔
조회수 218만회 · 11개월 전

- Her Krabi PR video is the most popular video on the Tourism Authority of Thailand’s YT channel (2.18M views)

A photograph of a crowded train car, overlaid with a semi-transparent red filter. The image shows several people, mostly young adults, sitting and standing. Many are looking down at their smartphones. In the foreground, a man with glasses is looking at his phone. Behind him, another man is also looking at his phone. To the left, a woman is looking at her phone. The train car has overhead handrails and windows. The overall atmosphere is one of a busy, modern public transit system where people are constantly connected to their devices.

3. The State of Social Media

2. Japan – Social Media in a Nutshell



YT is the most relevant and influential channel across the board



In travel, IG also offers relevant content



Need to be mindful of gender and age differences: e.g. IG is popular among younger women and X among older men

2. Korea – Social Media in a Nutshell



YT is the most relevant and influential channels when it comes to location-based and leisure content

IG also offers some relevant content, especially when it comes to Lifestyle & Influencer content

Naver is also a viable channel depending on where in the marketing journey you are: e.g. great for more discovery and inspiration, rather than for awareness

Importantly, Naver is always the starting point of a search, so it controls the journey

Need to be mindful of gender and age differences: e.g. IG is more popular among women and younger people

A photograph of a crowded train car, overlaid with a semi-transparent red filter. The scene is filled with people, many of whom are looking down at their smartphones. In the foreground, a young man with glasses and white earbuds is focused on his phone. Behind him, another man with glasses is also looking at his device. To the left, a woman in a light blue top and a brown bag is visible. The train's interior, including overhead handrails and windows, is visible in the background. The overall atmosphere is one of a busy, modern public transit environment.

4. Influencer Marketing

3. Influencer Marketing – the 4 Ps



Prior experience: have they worked with a competitor (not make or break, but important not to be positioned as being exclusively aligned with the competitor)?



Personal interest: affinity with the product; does the influencer like the product?



Proof of concept: the influencer wants to work with a brand that has some history (especially relevant in Japan): the best proof is if another influencer has worked with that brand; this makes it legitimate and acceptable



Product/Service: they need to explain the product/service to their audience, so need to make sure it's relevant to the audience

A 5th P is less important:

Personality: Matching the tone/vibe of the brand with that of the person is less important

3. Influencer Marketing – Top Takeaways

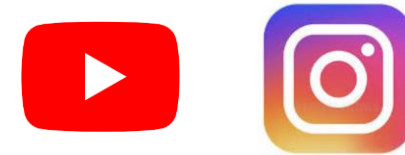
Partnerships can help short-term goals, but also brand building, need to focus on value creation rather than pure amplification and work across platforms



Short-term activations can be effective, but long-term brand building can benefit from influencer partnerships



Think about reach, but also about creating additional value for the brand as a result of influencer partnerships: what is the influencer personality, expertise and reputation adding to the brand?



YT and IG are very different in terms of type of content, but could work well in tandem

A photograph of a crowded train car, overlaid with a semi-transparent red filter. The image shows several people, mostly young adults, sitting and standing. Many are looking at their smartphones. In the foreground, a young man with glasses and white earbuds is looking down at his phone. The background is filled with other passengers, some holding onto the train's interior poles. The overall atmosphere is one of a busy, modern public transit system.

5. Summary & Recommendations

5. Summary



Content

1. Varied content (e.g. video + photos), multi-sensory
2. Korea/Japan connection: bridging the two cultures
3. Recurring themes, regular 'columns' and 'correspondents'
4. Seasonal & topical content: e.g. K drama, etc.
5. Gamify: chance-to-win, quizzes



Channel

1. Multiple channels work better
2. Consistent and regular posting pays off
3. OK to recycle content, but content can be platform-specific: also, consider 'deeper' content in a blog, etc.



Collaborator

1. Tap into internal resources
2. Partner with external individual influencers
3. Tapping into virtual influencer
4. Partnering with brands and releasing collaboration content
5. UGC content: tapping into traveller power!

5. Recommendations



Overall Strategy

You need strategy.
The most successful brands have a consistent approach (more on this later)



Varied but Relevant Content

Important to use varied content, but in line with what people need



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Not Influencer, but Collaborator

Consider what value each collaborator could bring, but they could be individual influencers, commercial brands or regular travellers (UGC)



Drago DJOUROV



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Email: drago@dd-global.com



Website: dd-global.com

intel·litur.

Gràcies!