



# 2020 BMP - USA

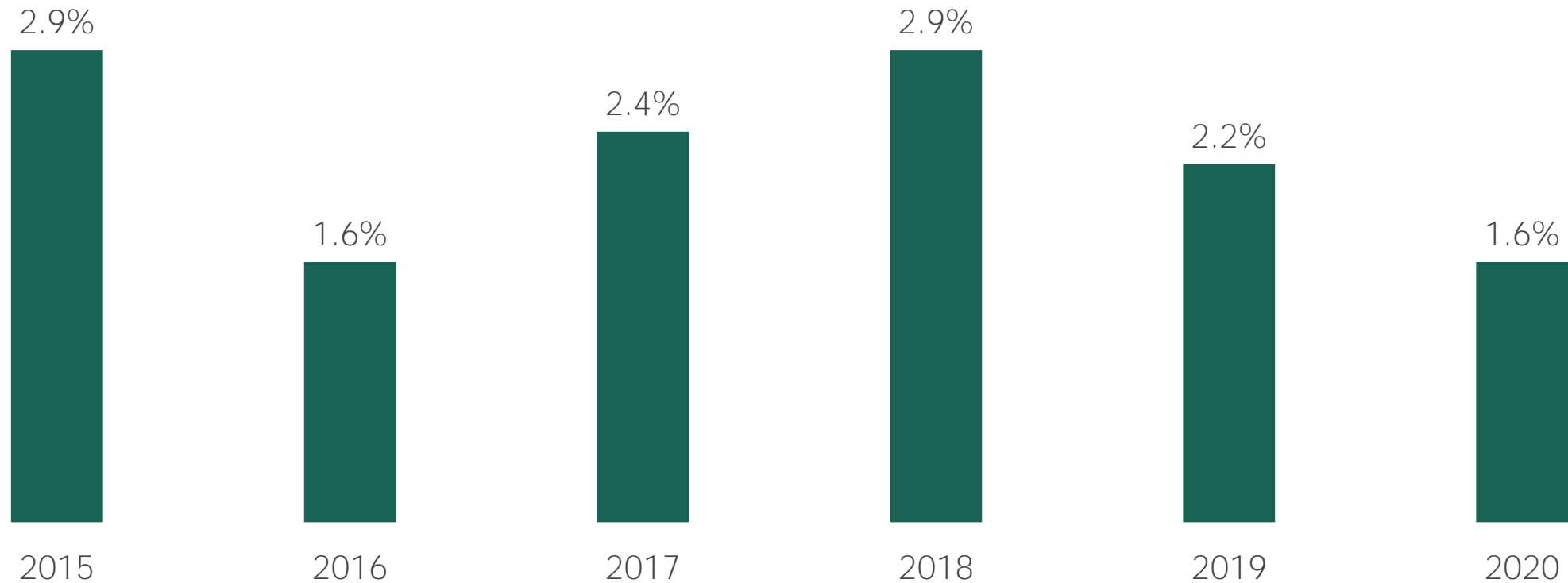
Jay Talwar  
Chief Marketing Officer



# MARKET CONDITIONS

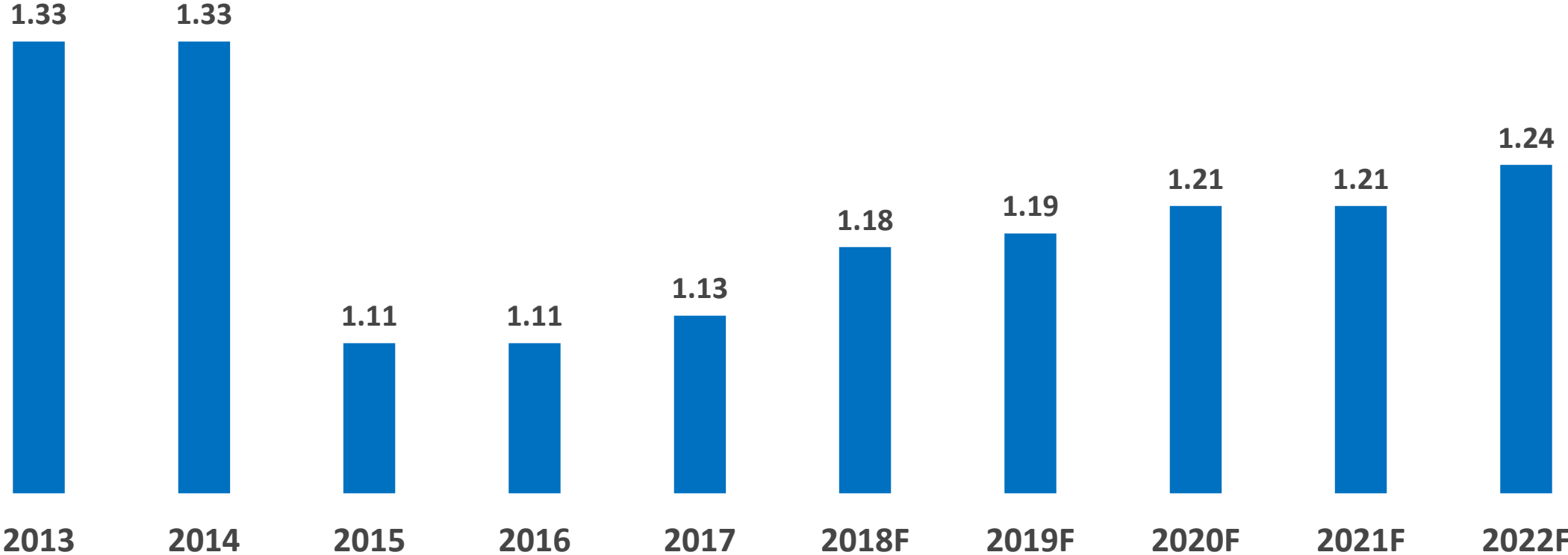
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# YEAR-OVER-YEAR U.S. GDP GROWTH



Source: HVCB analysis of Economist Intelligence Unit 09/2019

# U.S. DOLLAR FORECASTED TO GROW AT SLOWER RATE



Source: HVCB analysis of Economist Intelligence Unit data as of 1/2019

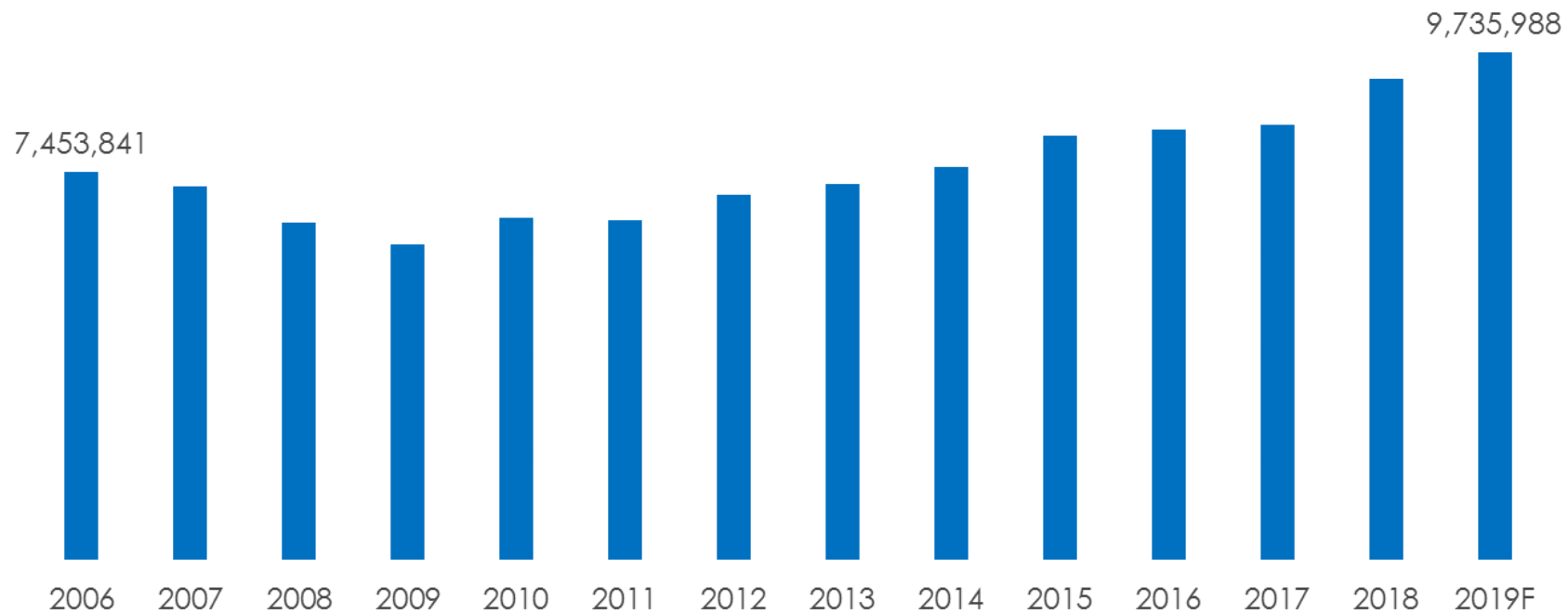
# U.S. ARRIVALS & SPEND AS OF Q3 2019P

	Expenditures	PPPD	Visitor arrivals
U.S. West	\$5.17 billion (+5.3%)	\$173.79 (-1.32%)	3.46 million (+10.5%)
U.S. East	\$3.59 billion (+2.5%)	\$212.08 (1.19%)	1.75 million (+4.0%)
Total U.S.	\$842 billion (+4.1%)	\$187.68 (-0.52%)	5.21 million (+8.2%)

*Source: HVCB analysis of HTA Q3 2019P data*

# NONSTOP AIR SEATS TO HAWAI'I HIT RECORD HIGHS IN 2019

Scheduled nonstop air seats U.S. Mainland to Hawai'i



Source: HVCB analysis of Diio Mi data

# U.S. AIRLIFT GROWTH CONTINUES

	2018	2019F	Volume Change	Percent Change
Alaska Airlines	1,689,975	1,770,772	+81,086	+4.8%
American Airlines	1,420,718	1,425,763	+5,045	+0.4%
Delta Air Lines	1,195,571	1,137,366	-58,205	-4.9%
Hawaiian Airlines	2,268,013	2,352,206	+84,193	+3.7%
Southwest Airlines		284,025	N/A	N/A
Sun Country	16,632	47,139	+30,507	+183.4%
United Airlines	2,628,724	2,728,919	+100,156	+3.8%
Total	9,219,633	9,746,190	+526,557	+5.7%

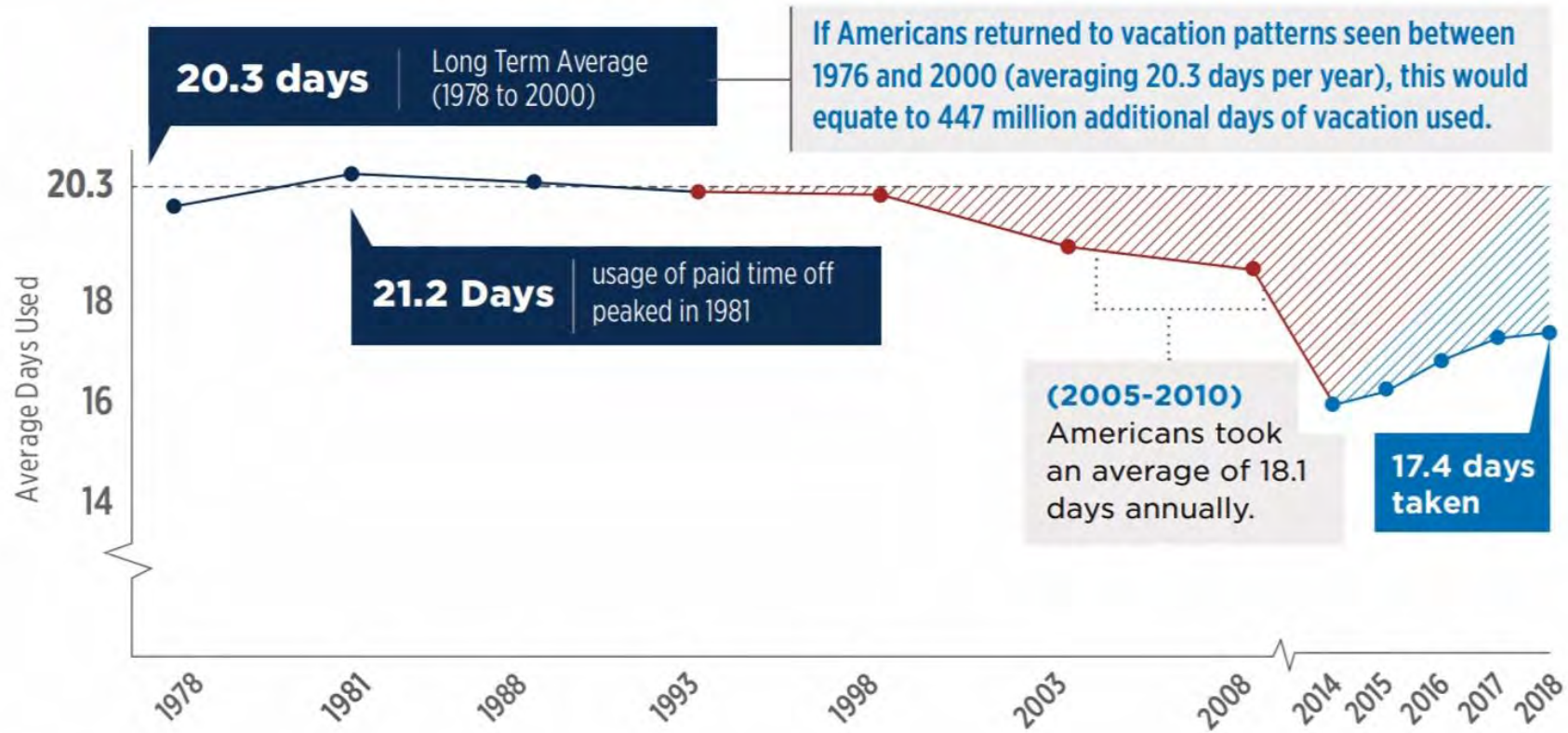
# OUTBOUND U.S. OVERSEAS TRAVELER MARKET SHARE 2018 VS 2017

	Total U.S. Outbound Travelers			Market Share of Outbound U.S. Travelers		
	2018	2017	Percent Change	2018	2017	Point Change
<b>Hawai'i</b>	6,368,851	5,841,530	+9.0%	10.1%	9.9%	+0.2 pt
Mexico (by air)	10,075,187	9,810,713	+2.7%	16.0%	16.7%	-0.6 pt
Caribbean	8,702,217	8,320,516	+4.6%	13.9%	14.2%	-0.3 pt
Europe	17,742,258	15,792,769	+12.3%	28.2%	26.9%	+1.4 pt
Asia	6,252,903	5,770,890	+8.4%	10.0%	9.8%	+0.1 pt
Canada (by air)	4,591,876	4,815,830	-4.7%	7.3%	8.2%	-0.9 pt
Grand Total	62,809,722	58,795,531	+6.8%	100.0%	100.0%	0.0 pt



# Americans are regaining sanity (but 768 mn days still unused)

## AMERICA'S VACATION TREND

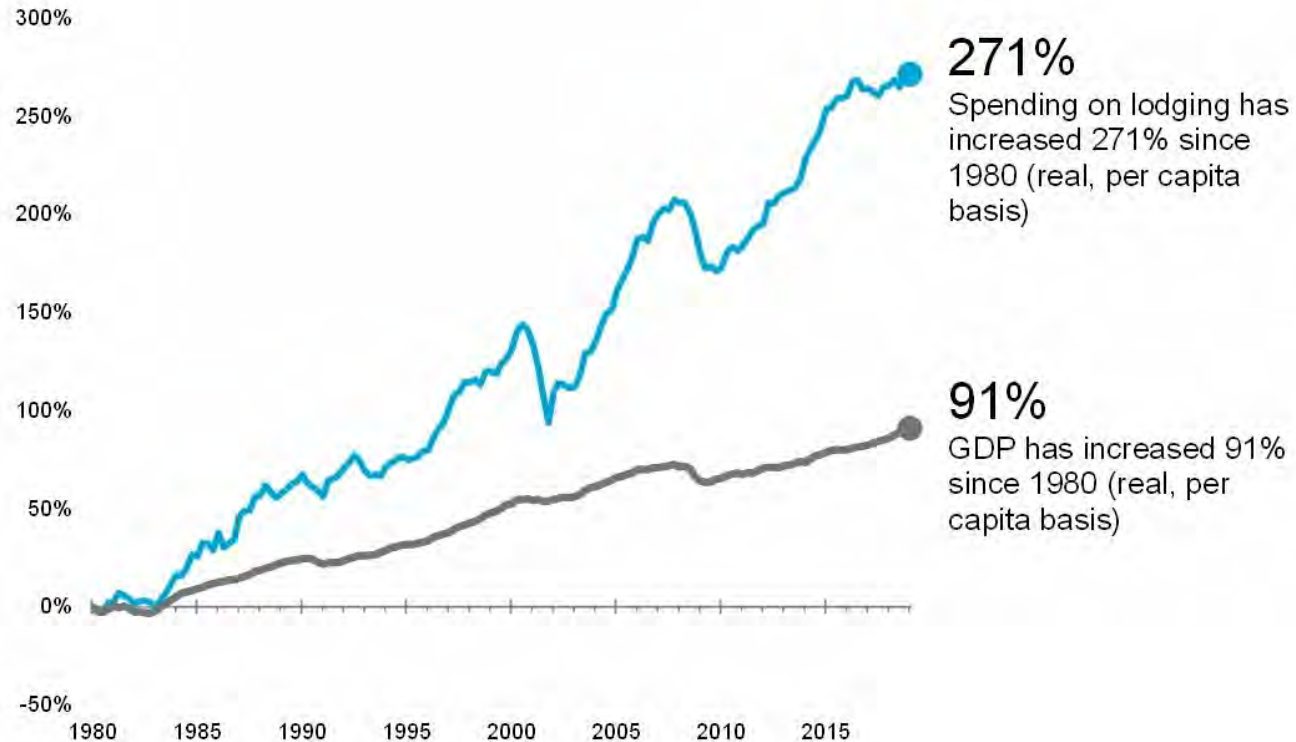


## Travel continues to gain American wallet share

### Consumer spending on lodging

Real, per capita GDP and spending on lodging

Percentage change since 1980



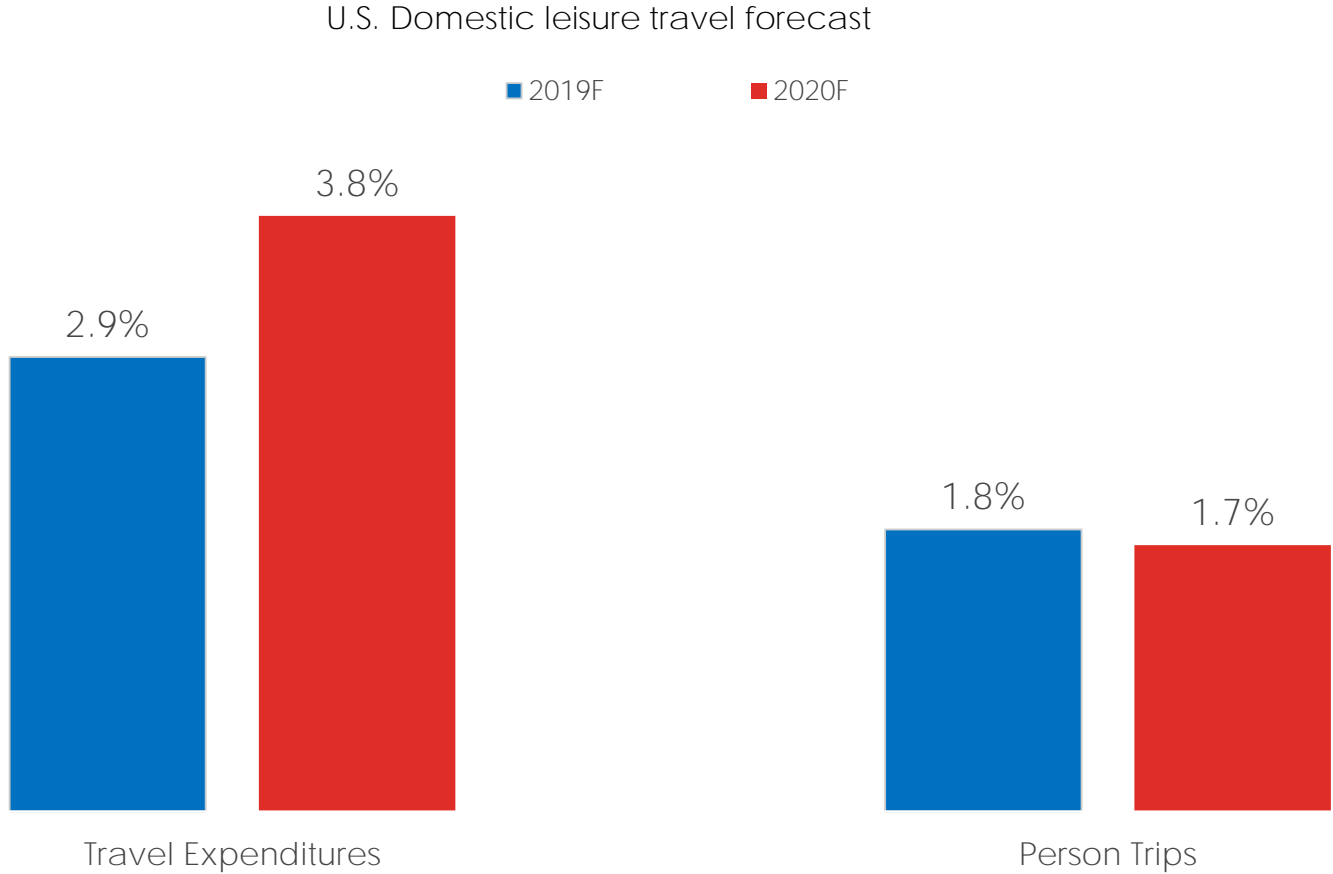
Note: Measures leisure travel spending on lodging by US households. Data through the first quarter of 2019.  
Source: Bureau of Economic Analysis; Oxford Economics



# TRAVEL TRENDS

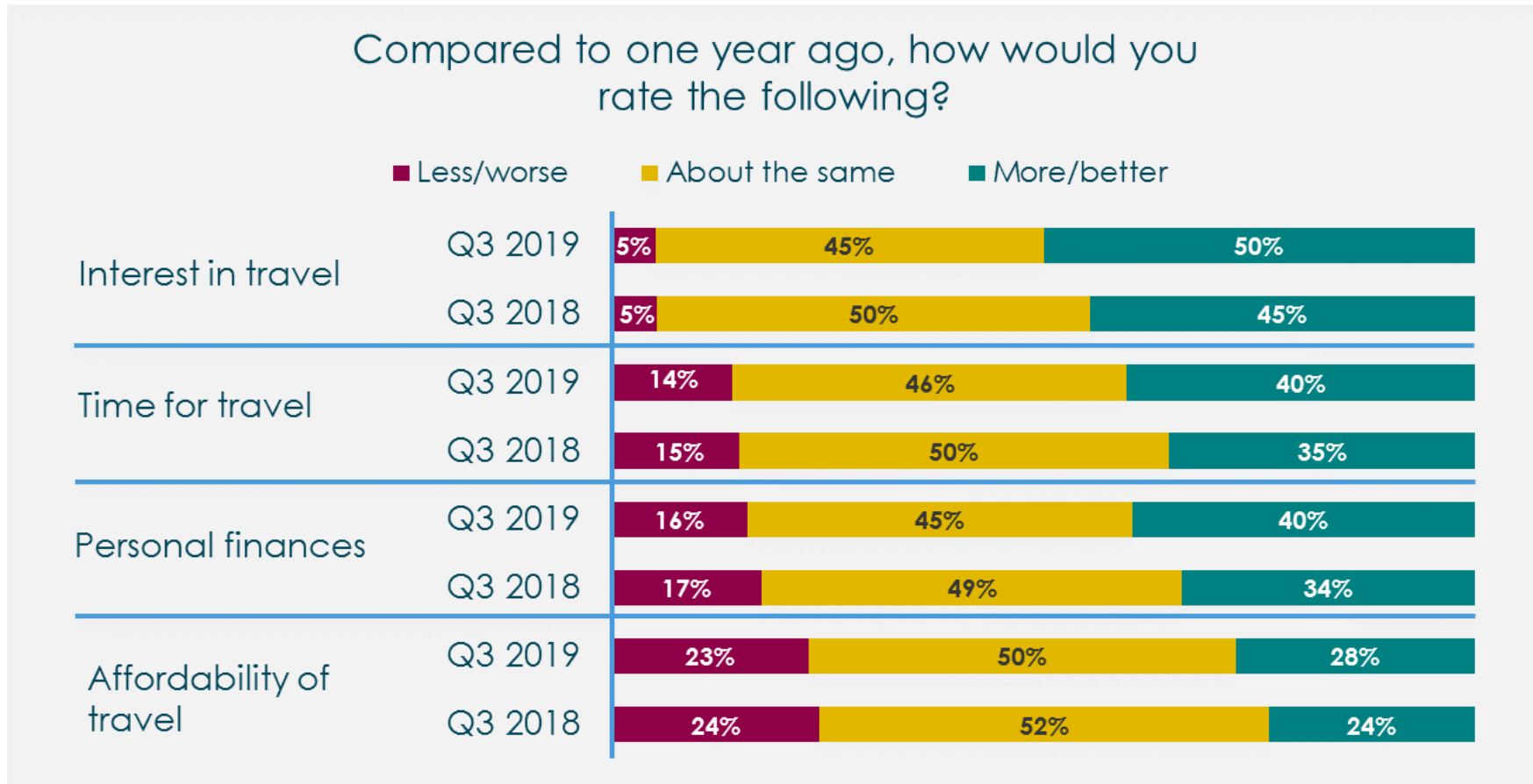
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# DOMESTIC TRAVEL SPENDING TO GROW

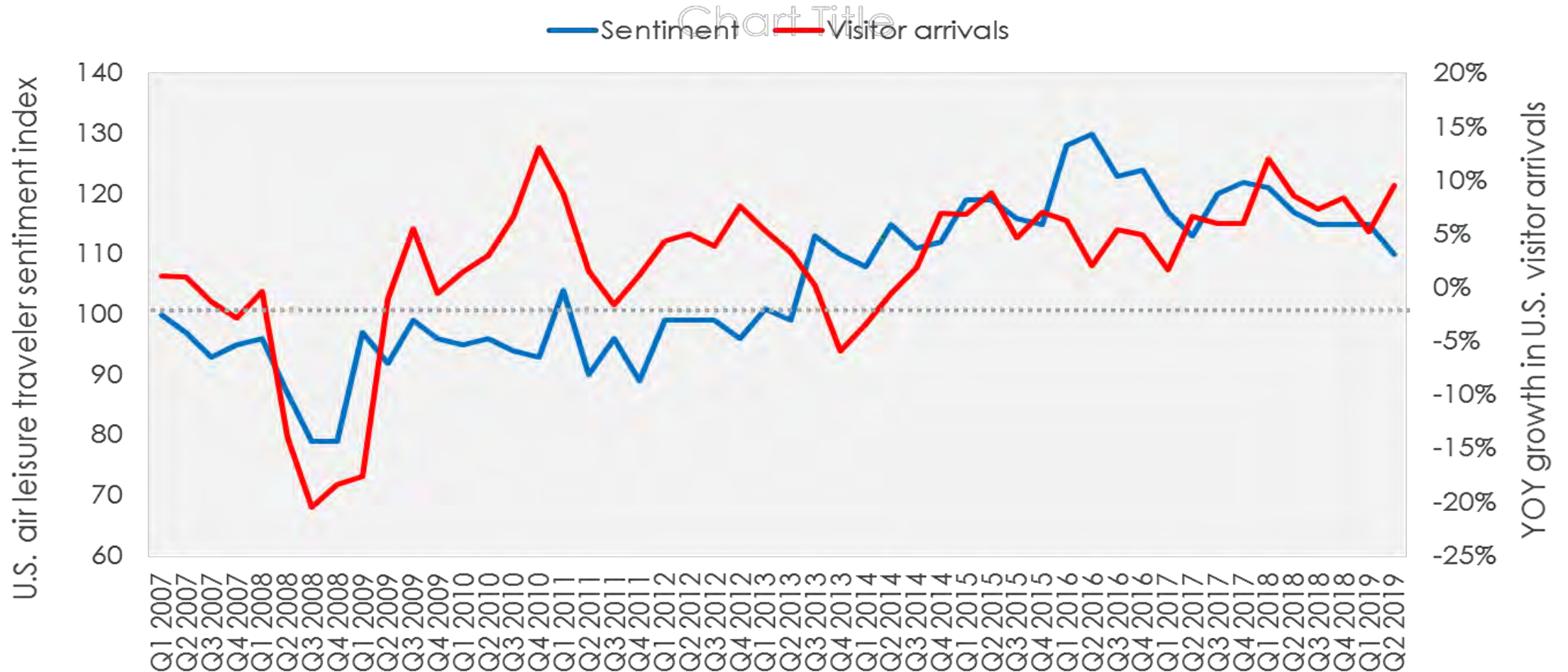


Source: U.S. Travel Association

# INTEREST, TIME, PERSONAL FINANCES AND AFFORDABILITY REMAIN POSITIVE



# U.S. AIR TRAVELER SENTIMENT TRACKS CLOSELY WITH ARRIVALS

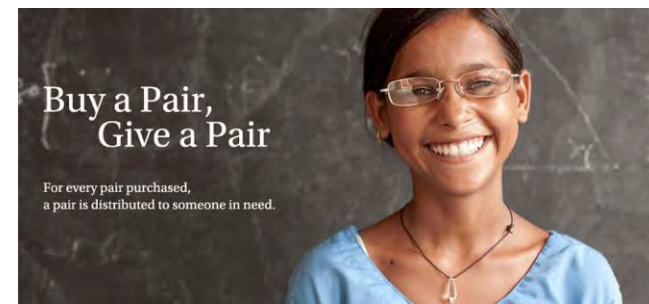


Source: HVCB analysis of MMGY Global travelhorizons Wave III 2019 data and HTA 2007-2019P data

# TARGET AUDIENCE

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# AVID EXPLORER










# AVID EXPLORER

## INFLUENCE OF SOCIAL MEDIA

Have Selected a Destination Based at Least Partially on Information Viewed on Social Media	Total	Interested in Visiting Hawai'i	Not Interested in Visiting Hawai'i
<b>Yes</b>	<b>67%</b>	<b>70%*</b>	<b>55*</b>

Have Selected a Destination Based at Least Partially on Information Viewed on Social Media	Total	Interested in Visiting Hawai'i	Not Interested in Visiting Hawai'i
<b>Facebook</b>	<b>62%</b>	<b>63%*</b>	<b>55%</b>
<b>Instagram</b>	<b>53</b>	<b>54*</b>	<b>45</b>
<b>YouTube</b>	<b>53</b>	<b>53</b>	<b>51</b>
<b>Pinterest</b>	<b>36</b>	<b>37</b>	<b>30</b>
<b>Twitter</b>	<b>24</b>	<b>24</b>	<b>21</b>
<b>Snapchat</b>	<b>23</b>	<b>23</b>	<b>19</b>

# AVID EXPLORER MEDIA CONSUMPTION

Media Channel	Usage	Usage Highlights
 Digital	Heavy	<ul style="list-style-type: none"> <li>• Spends on avg. 29 hours per week online</li> <li>• Digital guides their lives completely and they would feel disconnected without it (125). They use it for entertainment, communication and rely on it to keep them up to date with latest styles and trends (151)</li> <li>• Very active on social media and checks it throughout their day (127)</li> </ul>
 Outdoor	Moderate	<ul style="list-style-type: none"> <li>• The Avid Explorer Never <b>Been's</b> notice transit ad placements, such as ads in airports (223) and ads inside taxis (227) when they are out on the go</li> </ul>
 In-Cinema	Heavy to Moderate	<ul style="list-style-type: none"> <li>• The Avid Explorer Never Been targets love adventure and are eager to watch films in theaters that reflect that sentiment (147)</li> </ul>
 Magazine	Light	<ul style="list-style-type: none"> <li>• They are not heavy magazine readers (85) and only use them when convenient or faced with few other options</li> </ul>
 TV	Light	<ul style="list-style-type: none"> <li>• The Avid Explorer Never Been does not usually tune-in to Linear TV live (66), but instead chooses to watch the content on their own time and on their own devices/streaming services (192)</li> </ul>

# CONSUMER STRATEGY

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# HTA PILLARS

Community

Hawaiian  
Culture

Natural  
Resources

Marketing

A woman with long brown hair, wearing a light blue one-piece swimsuit, is swimming underwater. She is viewed from behind, reaching her hands towards the surface of the water. The water is a deep, clear blue, and there are some bubbles and light reflections visible. The overall mood is serene and hopeful.

A look ahead to 2020.



# 2020 NATIONAL BASELINE CAMPAIGN

EVERGREEN STORYTELLING

## Building Island Brands

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Advanced TV

**hulu** **ROKU** 





Cinema

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SPOTLIGHT  
CINEMA NETWORKS



# NATIVE CONTENT



**BuzzFeed**

 **feedfeed**

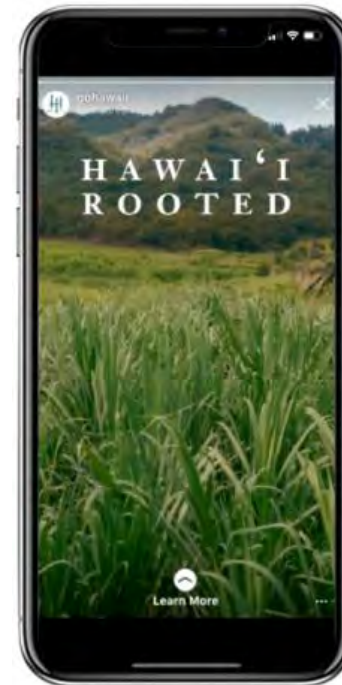
CONDÉ NAST  
**Traveler**

  
**GREAT BIG STORY**

  
**culture trip**

  
**MATADOR  
network**

# SOCIAL MEDIA



# PUBLIC RELATIONS

Continue to deliver cost-effective contemporary storytelling in an editorial context

## Coordinate

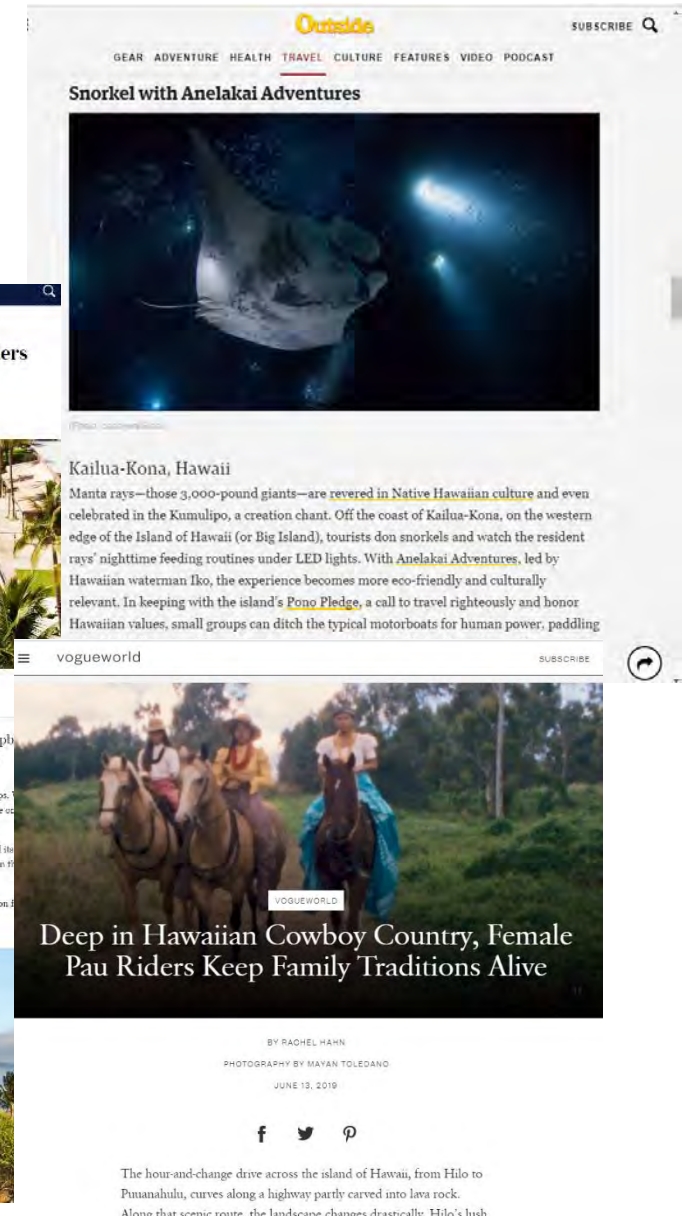
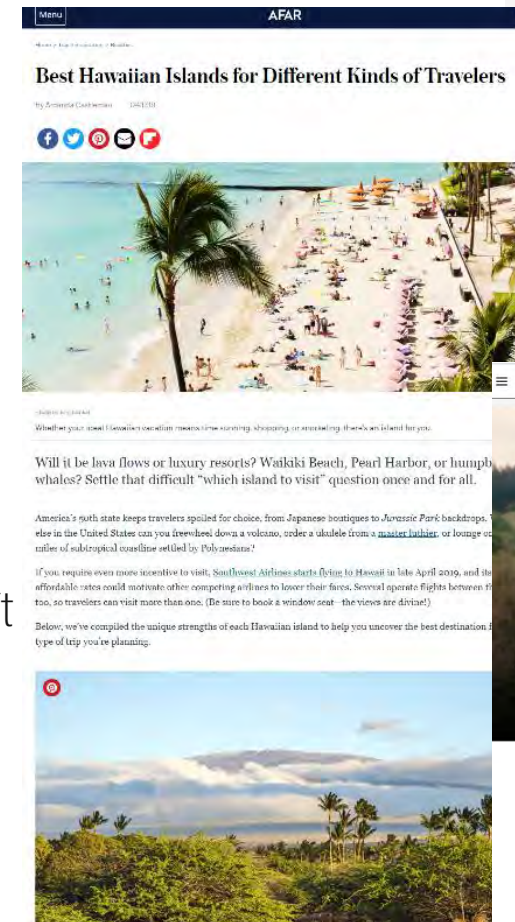
With Statewide, Island Chapters, GMTs, and industry partners

## Focus

Key storylines along Cuisine, Culture, Authentic Soft Adventure

## Connect

Develop deeper long-term relationships with the evolving landscape of content developers





# TRADE STRATEGY

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# TRAVEL TRADE

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Maintain leisure arrivals to Hawai`i, drive high value visitation & extend the Hawaiian Islands Brand

Awareness &  
Communication

Education &  
Training

Partner  
Marketing

# TRAVEL TRADE

- Trade communications
- Travel agent portal
- Training programs – live / on-line / webinars
- Sales blitzes
- Industry conferences / tradeshow
- Trade media – communicate branding and drive certifications
- Tactical cooperative marketing

## Five Ways to Experience the Real Hawaii Island

Produced by Virtuoso with Hawaii Tourism United States



The sun sets over the northeast Pololu Valley Lookout, one of Hawaii Island's most scenic seaside destinations.  
Photo by Larry Marshall



### Discover Hawaii's Heritage

To truly understand Hawaii is to know its stories, from mythical legends to modern tales. Learning about deeply rooted traditions, authentic cultural experiences and more local insights will bring you closer to this destination.

Complete the Official Hawaii Destination Program to gain the knowledge to plan your clients' own authentic moments. This multilayered program also gives you exclusive benefits like valuable consumer referrals, access to specialist-only webinars, and use of the Hawaii Destination Specialist badge. Let us help you become a Hawaii expert to grow your business and your clients will keep coming back for more.

[Learn More >](#)





# RESPONSIBLE TOURISM

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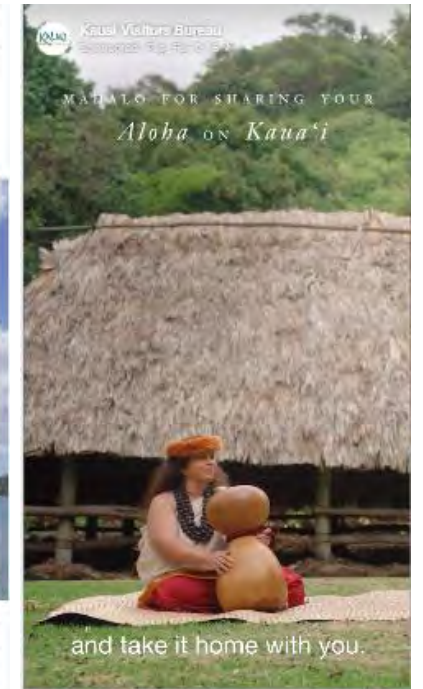
Educating Visitors Through  
On-Island Kuleana Messaging  
**In Alignment with HTA's pillars**

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- Marketing
- Hawaiian Culture
- Natural Resources
- Community

## Educating Visitors Through On-Island Kuleana Messaging

- A total of 20 videos were created for Maui, O‘ahu, island of Hawai‘i, Kaua‘i and statewide versions
- Select videos were translated and subtitled in Japanese, Korean and Chinese
- Maui videos launched in 2018 and have already generated over a million impressions
- Paid social for all islands started in June 2019 and will run through December; YTD have garnered almost 11mm\* impressions
- For Q4, videos will run on in-room channel (Hōkū TV, Real Hawai‘i TV, WHERE TV, Outrigger TV, Spectrum In-room) and Robert’s Hawai‘i Airport Express Shuttle



\*Impressions as of 10/29/19



# THE HAWAIIAN ISLANDS

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# BRAND GUIDELINES

## Brand Story

- History
- Challenges

## Our Brand

- Brand purpose
- Unique positioning
- Things to avoid
- Messaging

## Our Island Brands

- Kaua'i
- O'ahu
- Moloka'i
- Lanai
- Maui
- Island of Hawai'i

## Our Brand Assets

- Our brand voice
- Core elements
- Logo usage
- Color palette
- Typography
- Photography

## Brand Application

- Digital
- TV
- Print

# SOCIAL MEDIA COORDINATION



# GOHAWAII.COM

ISLANDS   EXPERIENCES   CULTURE      PLANNING   SOCIAL    LANGUAGES    





# 2020 BMP - CANADA

Susan Webb  
President, VoX International



# MARKET CONDITIONS

**HAWAII TOURISM**<sup>™</sup>  
CANADA



# MARKET CONDITIONS

Lowest  
unemployment  
rate

Steady wage  
rising

Economic  
growth  
**1.7%**

Canada US  
Mexico  
Agreement

Canadians  
spending in  
travel but  
carefully



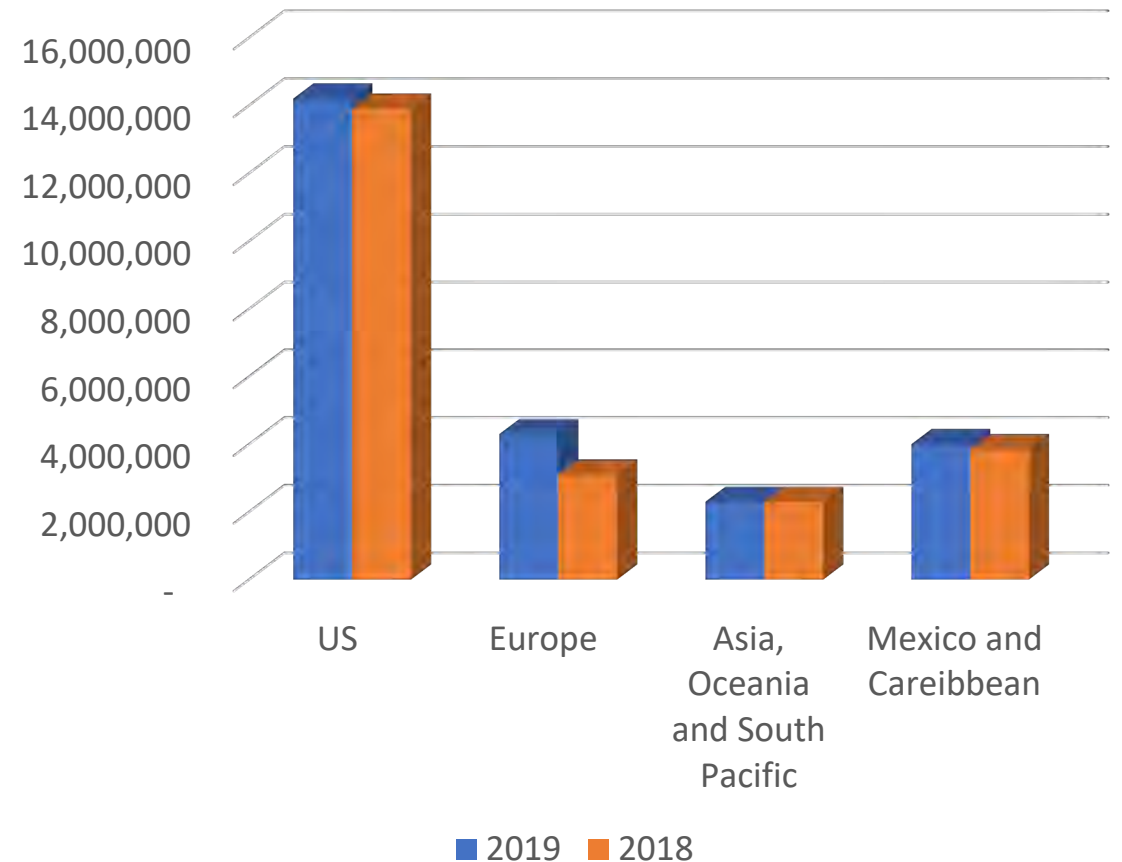
Minority Gov't  
PM Trudeau

Exchange rate  
**\$0.76**

# MARKET CONDITIONS

	2018	2019p
Arizona	328,359	314,373
California	1,578,057	1,594,673
Florida	1,438,063	1,523,726
Nevada	604,684	619,051
Texas	642,402	677,462
Hawai'i	261,829	275,600

- 21.17 million trips
- 14.2 million overnights to the US
- +2.0% vs 2018





### Number of Direct Seats by City

Jan-Sept, 2018	Air Canada	WestJet	Total
Calgary	14,382	25,152	<b>39,534</b>
Edmonton	--	8,646	<b>8,646</b>
Toronto	4,512	--	<b>4,512</b>
Vancouver	118,722	171,624	<b>290,346</b>
<b>Total</b>	<b>137,616</b>	<b>205,422</b>	<b>343,346</b>
Jan-Sept, 2019	Air Canada	WestJet	Total
Calgary	12,121	32,284	<b>44,405</b>
Edmonton	--	8,646	<b>8,646</b>
Toronto	5,161	--	<b>5,161</b>
Vancouver	123,455	175,218	<b>298,673</b>
<b>Total</b>	<b>140,347</b>	<b>216,148</b>	<b>356,885</b>
% change	Air Canada	WestJet	Total
Calgary	<b>-15.7%</b>	28.4%	<b>12.3%</b>
Edmonton	--	0.0%	<b>0.0%</b>
Toronto	14.4%	--	<b>14.4%</b>
Vancouver	4.0%	2.1%	<b>2.9%</b>
<b>Total</b>	<b>2.0%</b>	<b>5.2%</b>	<b>3.9%</b>

Source: OAG, US BTS

# TRAVEL TRENDS

**HAWAII TOURISM**<sup>TM</sup>  
CANADA

# DISTRIBUTION CHANNELS



59%

Websites  
via computer



40%

Personal  
recommendations  
from family and  
friends



28%

Websites/  
Applications  
via mobile phone



28%

Websites/  
applications  
via tablet



19%

Personal advice  
from travel  
professionals/  
agents

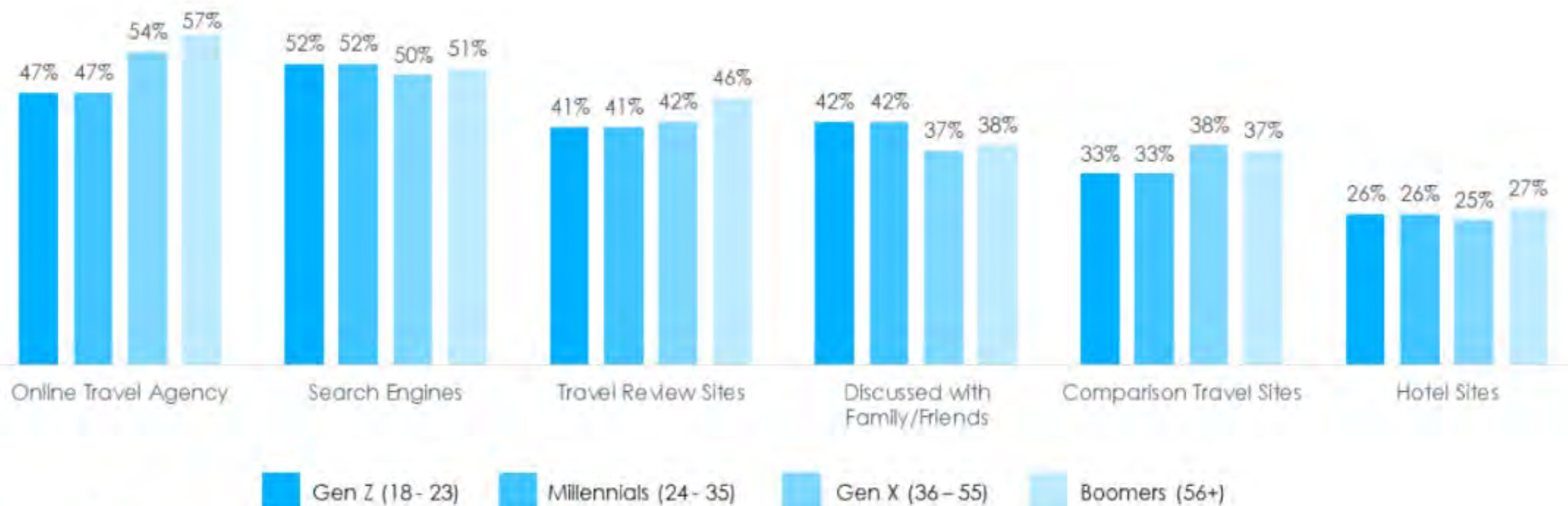
# TOP MOTIVATORS

Motivation	% Selected
Beaches/Seaside Attractions	54%
Cultural Historical Attractions	48%
Local Lifestyle	44%
Dining/Gastronomy	38%
Urban Attractions/Nightlife	34%



Giving back and sustainability is important to Canadian travelers

# OTAs AND SEARCH ENGINES ARE LEADING PLANNING RESOURCES





# TARGET AUDIENCE

HAWAII TOURISM™

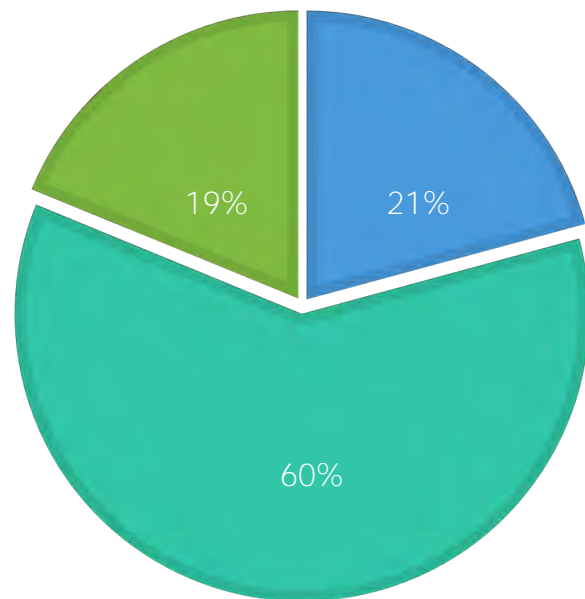
CANADA

# TARGET AUDIENCE

## CANADA'S MOST POWERFUL AUDIENCE 16.1 MILLION OVER 45

Canada's Zoomer (45-plus) population controls about 70% of the nation's wealth & accounts for 60% of all consumer spending

■ 18-34   ■ 35-64   ■ 65+



## segmenting millennials

BROAD AUDIENCE

millennials



SUBSEGMENTS

student



new professional



mature adult







Experience seekers



Affluent traveler

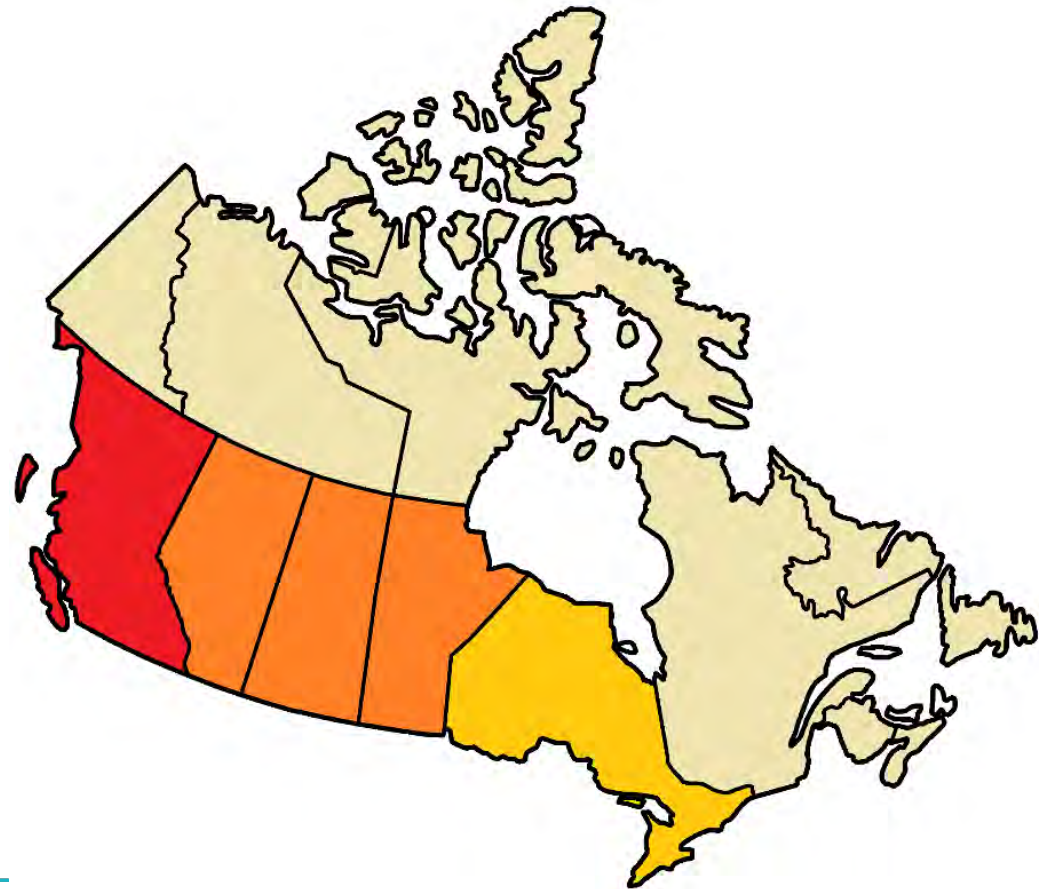


Snowbirds/Retirees



Romance

Priority Markets:  
British Columbia (Vancouver)  
Alberta (Calgary and Edmonton)  
Ontario (Toronto)  
Balance of Canada (Montreal)





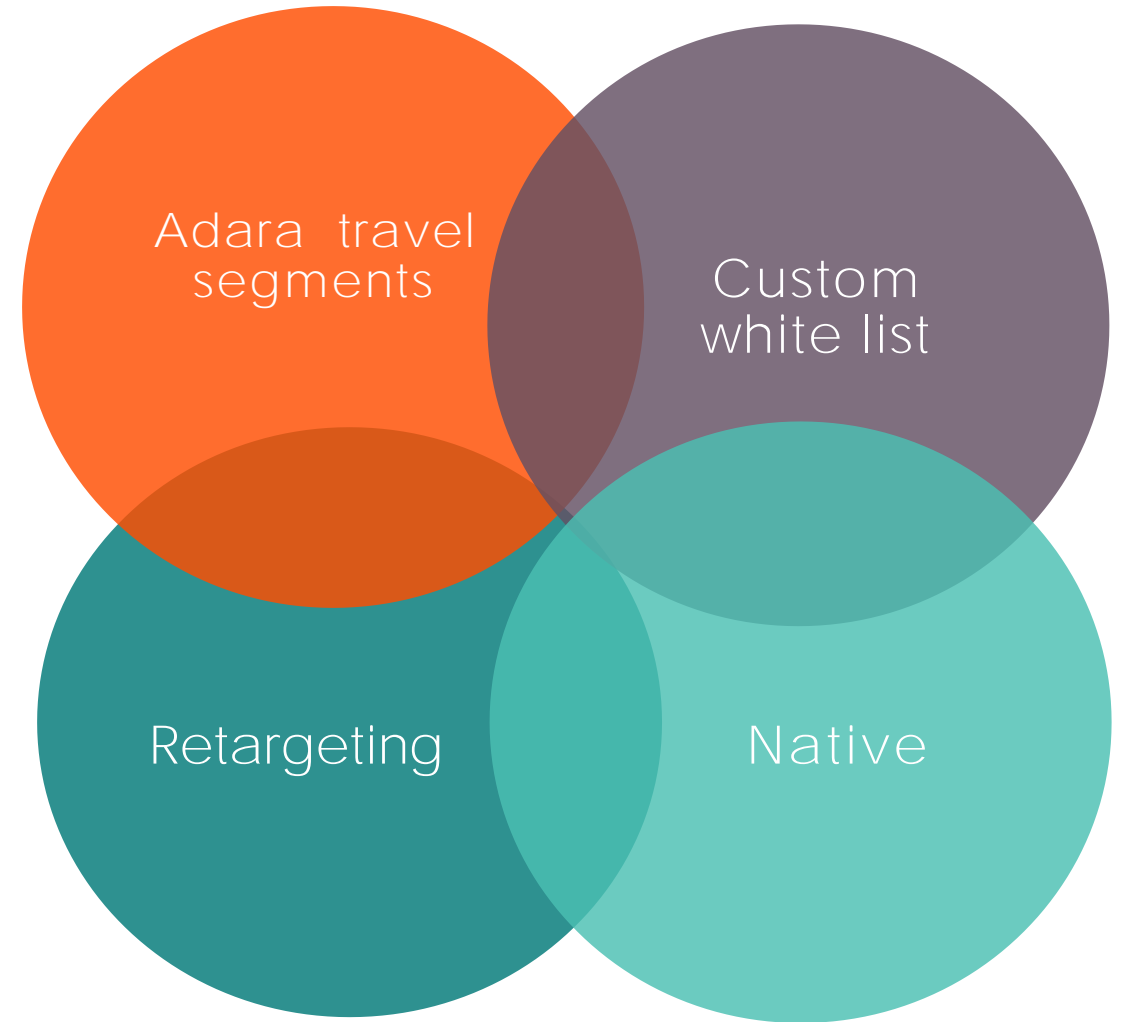
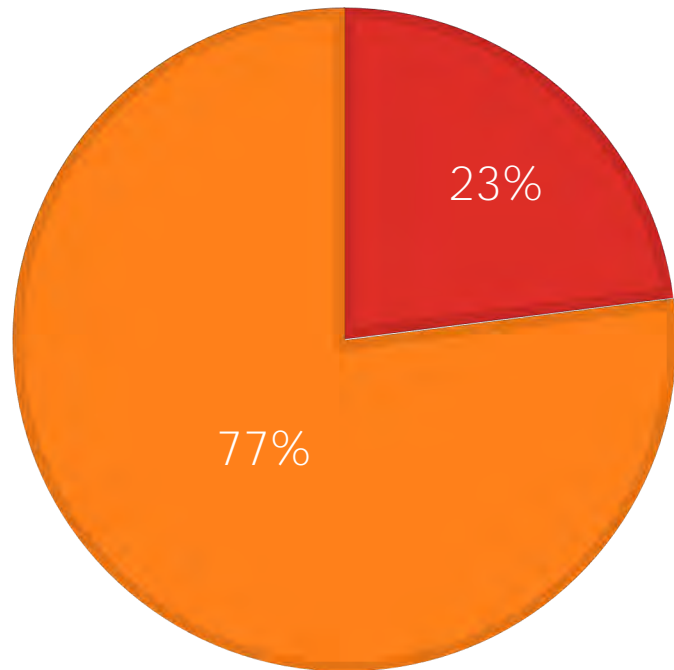
# CONSUMER STRATEGY

HAWAII TOURISM™

CANADA

# CONSUMER STRATEGY


- Social Media (Organic and Paid)
- Digital Media (Display and Video)



# CONSUMER STRATEGY

## General approach

- Extend season
- Increase stay
- Increase spend
- Multiple island



**KŪKINI** The HAWAIIAN ISLANDS  
Kaua'i - O'ahu - Moloka'i  
Lana'i - Maui - Hawaii'i

Information and ideas to inspire your next vacation to Hawaii.

**Hawaii is Open for Business**

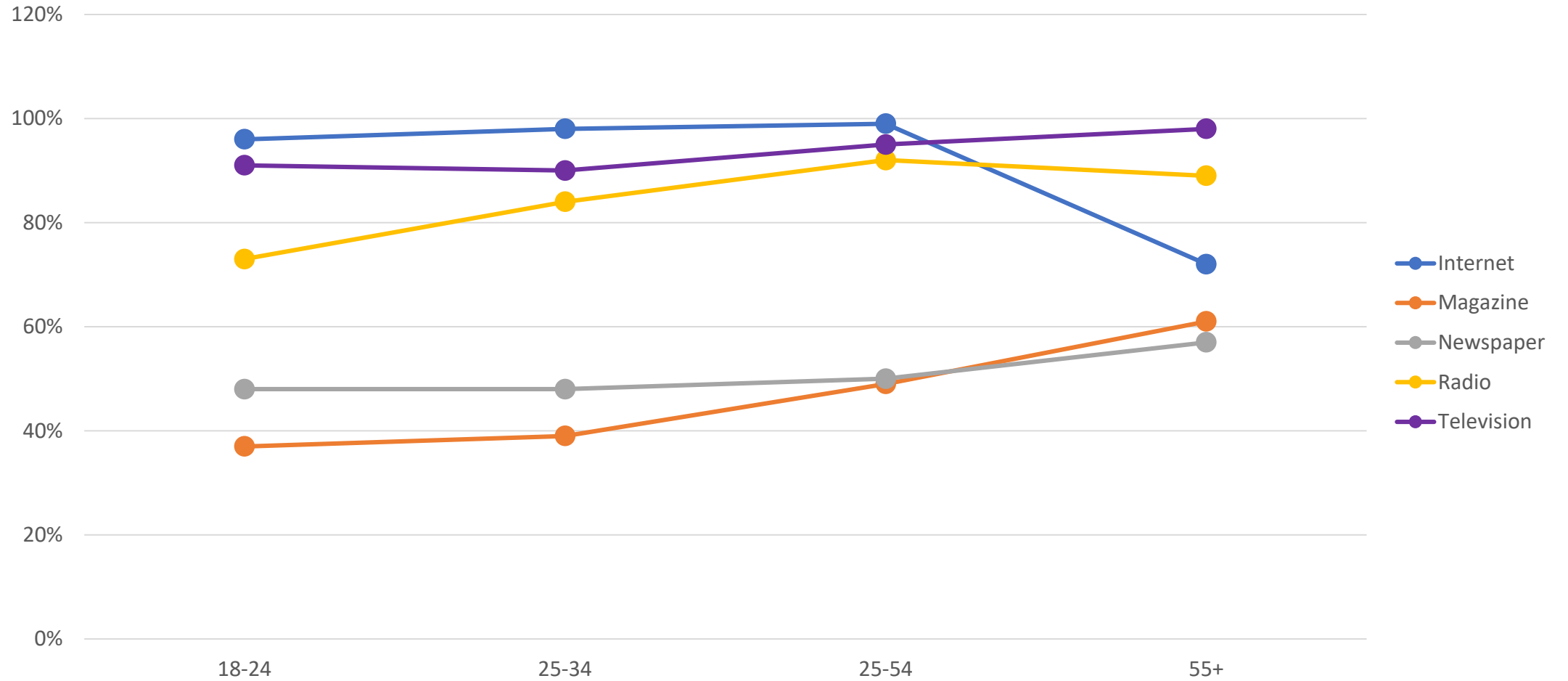
Rest assured, the State of Hawaii is fully open for business and travellers should not be dissuaded at all from making or planning trips to one of the most acclaimed island escapes in the world.

## Branding message

- Unique experiences
- Culture: Aloha Spirit, friendly & welcoming
- Natural Resources: sustainable
- Safe
- Bucket list travel
- Diverse accommodations

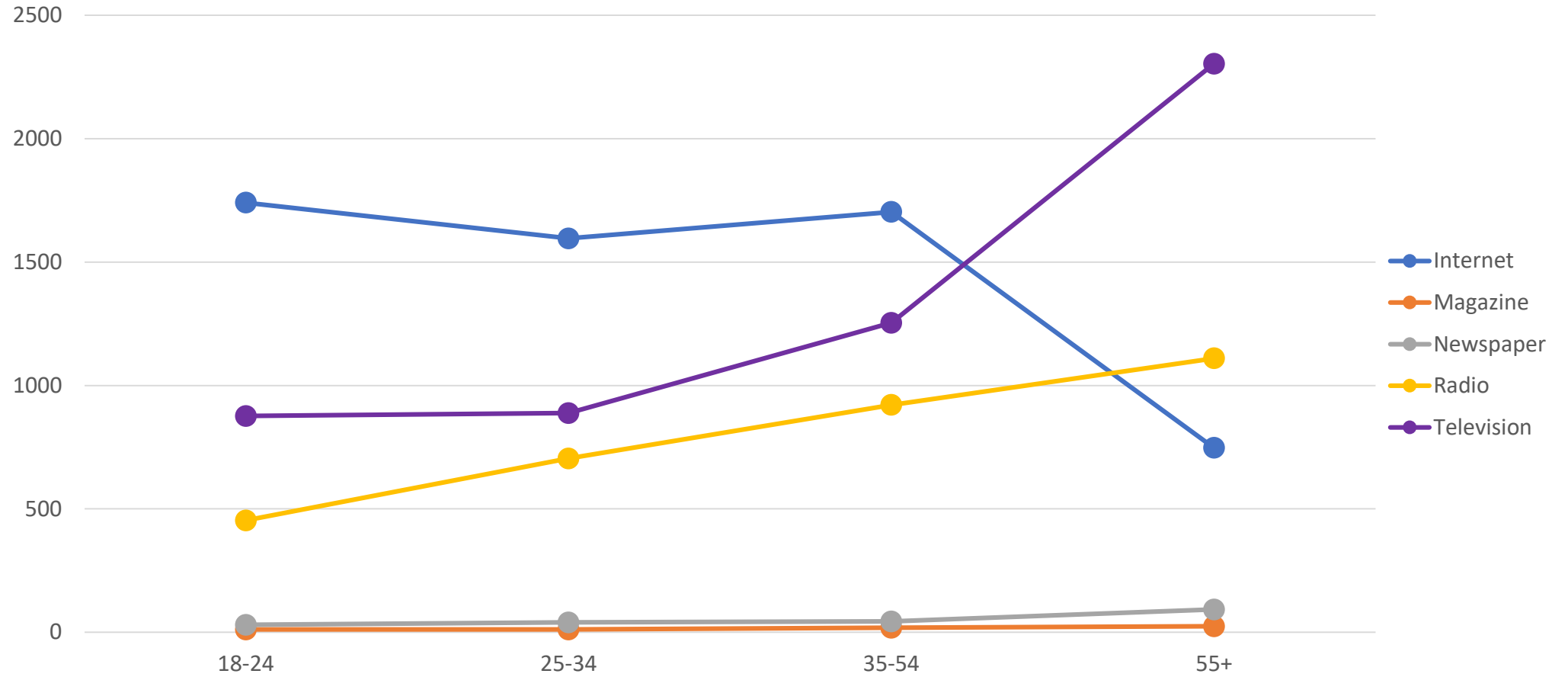
# MEDIA PREFERENCES

Weekly reach by demo



# MEDIA PREFERENCES

Minutes per week per capita



# CONSUMER STRATEGY



luxury/affluent  
70,000 – 80,000



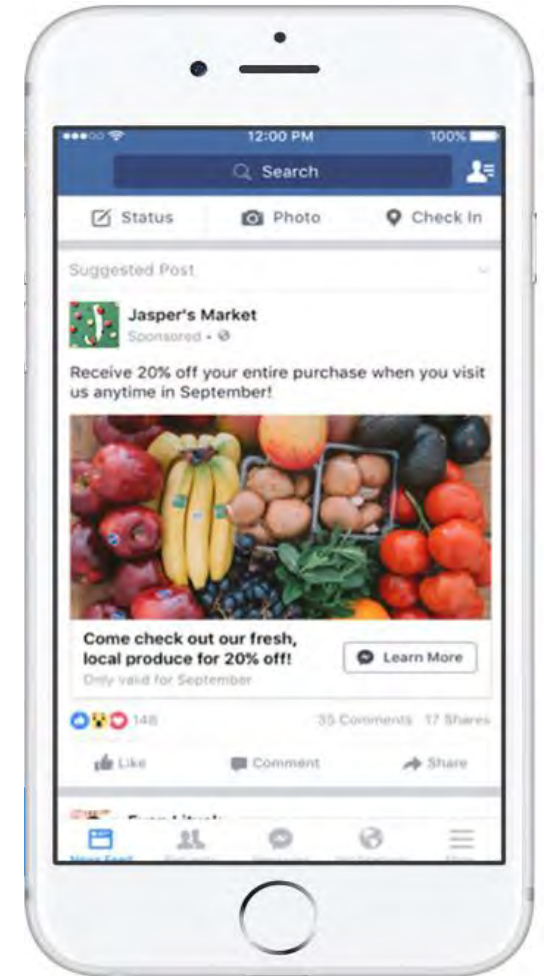
romance  
35,000 – 40,000



experience seekers  
1,500,000 – 2,000,000



snowbirds  
10,000 – 15,000



# CONSUMER STRATEGY



Public Relations focus:

- Luxury/affluent
- Romance
- Culture/culinary
- Adventure/outdoors/nature
- Family





# TRADE STRATEGY

HAWAII TOURISM™

CANADA

# TRADE STRATEGY

## Communication:

- Trade publications campaign
- Eblast
- Newsletters



**NEWS**

**"Don't shy away from selling Hawaii": Agents get the latest updates at ALOHA Canada 2019**

TORONTO — Hawaii has never been, and will never be, an all-inclusive destination. But there are still ways to plan a relatively inexpensive Hawaii vacation for clients, say the state's tourism reps. The team was out in full force earlier this month at the event space in Ballisue for the ALOHA Canada 2019 industry event, hosted by Hawaii Tourism Canada, represented by Todd International.

Agents took part in informational sessions presented by the island's hotel and airline partners, followed by dinner with most representatives about the island themselves.

"Not only can Hawaii be budget-friendly, it's also a safe destination," says Kristina Chowdhry, Director of Sales, Galt Visitors Bureau.

"We will never be an all-inclusive destination," says Chowdhry, "but we really do have something to suit every one's budget. We have a wide range of products, and the culinary experience is amazing."

**Message for Canadian agents?**

"Don't shy away from selling Hawaii. It's not as accessible as you think it is. An Air Canada and WestJet have flights to Hawaii, plus there are other options via U.S. carriers like Jet Airways."

**NEWS**

**Travelers2000 partners with Uplift to offer pay-over-time payment plan**

TORONTO — Travelers booking with Travel2000 can now take their time paying for their vacation packages thanks to a new payment plan technology.

The company, a division of local Leisure Vacations Inc. (LVI), has announced a new Uplift plan that allows clients to book and pay for vacation packages over a 12-month period.

The plan will eventually be applied to other products in the future.

"Our partnership with Uplift allows our customers to budget and plan their getaways while being able to purchase the best experiences possible," said Catherine Jackson, vice president of retail, LVI. "Canadian travelers can take the holiday they deserve without the stress of being able to afford to pay for it all at once. Now, dream vacations no longer have to wait."

Based in California, Uplift offers pay-over-time financing solutions. The application is a commitment-free and seamless loan decision within seconds, all within the current checkout process on Travel2000. Customers can pay off their balance early with no penalties.

"We are so pleased to be partnering with Travel2000, one of Canada's most recognized and respected retail brands," said Denise Wilton, Managing Director of Uplift Canada. "Our customers are perfectly aligned as both Travel2000 and Uplift are progressive, creative organizations that understand travel technology. Above all, we are both truly passionate about travel and together we will help more Canadians realize their travel goals and dreams."

**Experience the spirit of Aloha.**

#Let'sHawaiiHappen  
gohawaii.com/ca

**HAWAIIAN ISLANDS**  
Maui • Oahu • Molokai • Lanai • Kauai • Hawaii

**Great courses available to take online**

**Learning CENTRE**

**VIA Rail Specialist Program**  
Created by VIA Rail experts, this course will familiarize you with VIA's products and services and will leave you confident in your ability to sell VIA to your clients.

**Imagine Your Korea Specialist**  
Take the Imagine Your Korea Specialist course today and learn about one of the world's most dynamic destinations - beautiful, high-tech, friendly and cultured.

**Hawaii Destination Specialist**  
This three-tiered, self-guided course delivers in-depth knowledge and insights into the Hawaiian Islands providing you with effective sales tips and valuable benefits while becoming a booking pro.

# TRADE STRATEGY



**HAWAIIAN BEACH BLOWOUT!**

**GET AN EXTRA \$150 OFF**  
PER COUPLE

**TAKE US THERE**

AIR CANADA VACATIONS

**HAWAIIAN ISLANDS**  
Ewa - Oahu - Molokai - Lanai - Maui - Hawaii

"Hawaii Tourism Authority (HTA)"

**WESTJET** Canada English Sign In

Book Manage and plan Vacations Rewards About us Check in Low fares Search

Deals and offers Vacation finder Business travel WestJet BCB credit cards

**Instant savings - Hawaii**

[Home](#) | [Low fares and more](#) | [Vacation offers](#) | [Instant savings - Hawaii](#)

**Say aloha! when saving \$200 per room with a minimum 5-night stay at hotels, resorts and condos in Kauai and Maui.**

Aloha! The islands of Hawaii await you. From Maui's world-famous beaches to the lush green of Kauai and from inviting Oahu to the awe-inspiring island of Hawaii, there's no shortage of paradise to enjoy. Right about now is a great time to start thinking about taking your next vacation in Hawaii.

Looking for savings in Oahu and The Island of Hawaii? Click [here](#) for the list of hotels.

**Book by:**  
Offer is limited to the first 113 rooms booked as a qualified package.

**Travel:**  
Now - April 30, 2020

**How to get this offer:**  
Package price will automatically reflect the discount when searching for qualified vacations.



# TRADE STRATEGY



**Prize Details:**

- Two (2) roundtrip Economy Class air seats aboard Air Canada, to Honolulu, Hawai'i. (Over a major Canadian gateway located closest to the prize winner's place of residence that is served by Air Canada - Toronto, Calgary or Vancouver)
- One (1) for five (5) nights at the Queen Kaiulani Hotel, Waikiki (del or del over in a Diamond Head View room, European plan, tax/mesh)
- Four for two (2) for a Sabanafora Dive with Atlantis Adventure

**The Hawai'i Destination Specialist Program**

A tiered, self-guided educational program that delivers in-depth knowledge and insights into the Hawaiian Islands as well as effective sales tips to transform you into a booking pro.

Visit [travelweek.ca/contests/experience-the-spirit-of-aloha/](http://travelweek.ca/contests/experience-the-spirit-of-aloha/) to enter



#### Upcoming and Recorded Webinars

Spilled Agent <kelly@spilledagent.com>  
To: Rita Spzern

Hawai'i Island - The Possibilities for Adventure are Endless

**The ISLAND of HAWAII.**

Webinar Date: **Thursday, July 18, 2019 3:00 PM EDT**

**REGISTER NOW!**

A new adventure awaits every day. Hike the dramatic landscapes of an active volcano, zip line over lush rainforest, or snorkel amongst our graceful manta rays. Let your clients experience these unforgettable moments while immersing themselves into the island lifestyle.



#### Education:

- Aloha Canada 2020
- Webinars
- Trade shows
- FAM trips
- Hawai'i Destination Specialist Program

MCI

HAWAII TOURISM™

CANADA

Meet  
HAWAII  
meethawaii.com

# MCI

Target: Top 20 corporations PCOs/Travel firms

SITE shows

MCI Fam

Strategies:

- Leads
- Conversion
- Partnerships
- High-need periods
- Education/training
- PR & Communications



# MCI

## Ignite Campaign



### Your Hawaiian Journey Starts Here

Deborah Edwards is the account manager for meetings, conventions and incentive travel for Hawai'i Tourism Canada. Deborah is your Canadian connection between MCI planners and Hawai'i partners.

With an extensive career spanning over 20 years in the travel industry, Deborah has developed an extensive knowledge of the MICE market in Canada. She is your first point of contact in your journey to the Islands of Hawai'i and welcomes you to reach out to her with all of your Hawai'i questions and RFPs.

She can advise on island incentives that are available for clients that qualify, and is a source of information on island partners, DMCs and suppliers for any need.



**DEBORAH EDWARDS**  
Account Manager - MCI  
Hawai'i Tourism Canada Office  
130 Queens Quay East  
Suite 1200, West Tower  
Toronto, ON M5A 0P6

kahua pa'a web: [meethawaii.com](http://meethawaii.com)  
leke uila email: [deb@voxiinternational.com](mailto:deb@voxiinternational.com)  
lelepona tel: 289.253.9660

Total unique subscribers:  
28,165 planners  
3,234 suppliers

**HAWAII TOURISM**  
CANADA

# RESPONSIBLE TOURISM

HAWAII TOURISM™

CANADA



# RESPONSIBLE TOURISM

## Consumer:

- Digital
- HTCAN Social networks
- E-blasts
- Editorial

## MCI:

- Branding
- Culture
- Community
- Resources
- Education

## Trade:

- Educational
- Partners
- Newsletters
- Aloha Canada


Travelweek **NEWS**

Airlines | Cruise | Destinations | Hotels & Resorts | Other News | Tour Operators | Travel Agent



**Hawaii Responsible Tourism: Travel Tips**

*The*  
**HAWAIIAN**  
ISLANDS



**Hawaii – Incredible stories of the people**

Not to boast, but Hawaii is a special place. There's the climate, the beautiful beaches, and a collection of outdoor activities that is second to none. If you've been, you've likely already experienced the welcoming Aloha spirit.

But there's more. Beyond what you may know, there are the people. Incredible people and their stories that will give you a whole new appreciation of what's so special about Hawaii. We invite you to take a few minutes to meet just a few who are dedicated to cultivating and protecting what makes Hawaii so unique.

[Mark Noguchi](#), an executive chef whose spiritual connection to the island's culture shapes how he creates incredible food experiences.

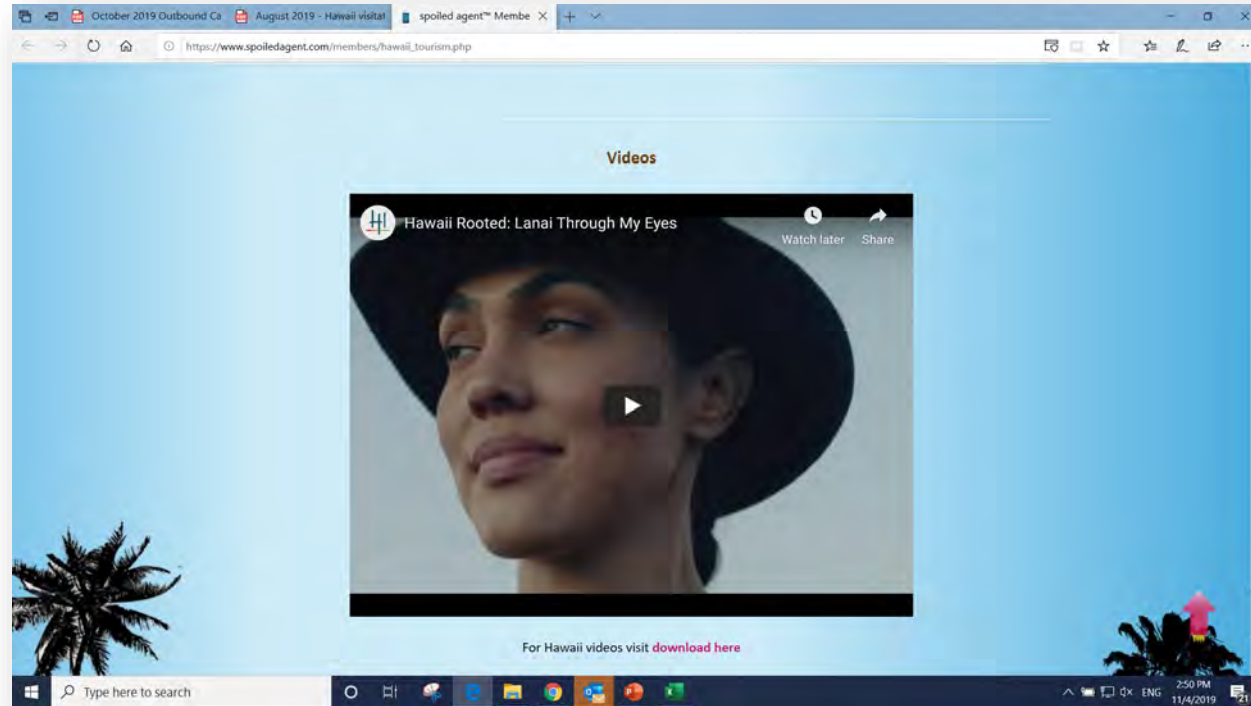
[Dustin Tester](#), a women's surfing pioneer who rides Hawaii's biggest waves and empowers other women to overcome fears through the surf school she founded.

[Kaumaka'iwa Kanaka'ole](#), a Kuma Hula (master Hula teacher) who connects herself and her students to the islands through the primal power of Hula.

[Keone Nunes](#), a Native Hawaiian tattooist who bridges physical and spiritual worlds while practicing his art by using only the traditional tools on the brave and worthy.

These are just four of the incredible and inspiring people featured in a collection called "Rooted". Please enjoy. [www.gohawaii.com/hawaii-rooted](http://www.gohawaii.com/hawaii-rooted)

# RESPONSIBLE TOURISM



Kuleana Campaign  
partnerships



# 2020 BMP - OCEANIA

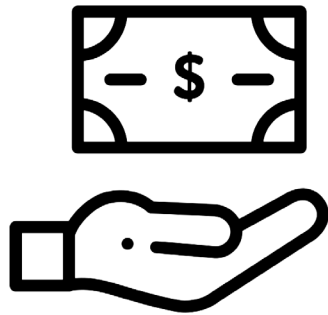
Darragh Walshe, Giselle Radulovic & Charis Ricafuente  
New Zealand/ Australia

# MARKET CONDITIONS

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# MARKET CONDITIONS - AUSTRALIA

## ECONOMY

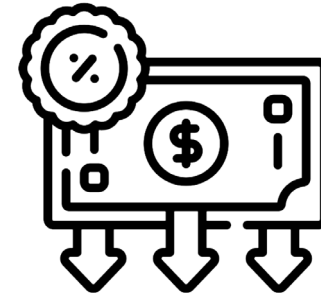


Personal tax cuts and low interest rates stimulating discretionary spending



AUD\$.068 = USD\$1

10 year low and may fall further



GDP 2.75%

GDP growth has slowed to 2.75% for 2019

# MARKET CONDITIONS - AUSTRALIA

## TRENDS

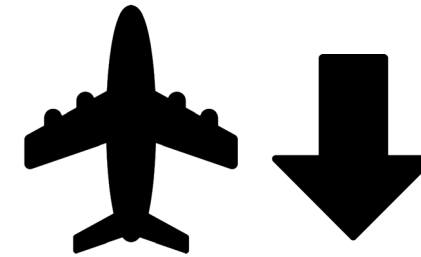


Domestic tourism  
increase in 2019



Seniors (55+ yrs)  
emerging

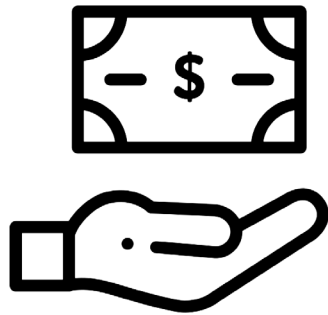
## AIRLIFT



- Drop in capacity between 2018/ 2019
- Cancellations by Jetstar reduced availability in first 6 months

# MARKET CONDITIONS – NEW ZEALAND

## ECONOMY

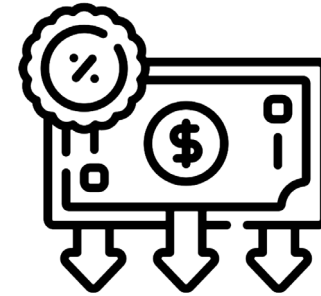


Record economic surplus,  
yet business confidence  
low due to slow growth



AUD\$.063 = USD\$1

Lowest point in a decade  
and expected to hover  
around this level



GDP STEADY

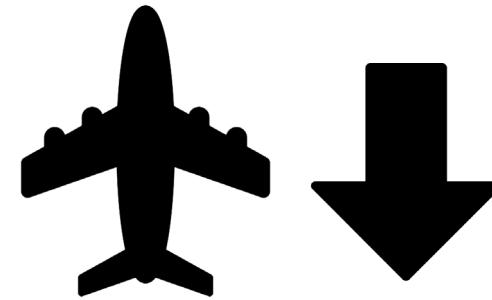
# MARKET CONDITIONS NEW ZEALAND

## TRENDS



- Subject to global market impacts
- Outbound tourism continues to grow
- Trend towards shorter but more frequent holidays

## AIRLIFT



- 2018 - a unique situation of almost 50,000 new air-seats flooding the market
- 2019 and beyond - a return to normal capacity
- Focus on increased loads and yield



# TRAVEL TRENDS

---

# TRAVEL TRENDS

**BUSINESS**

## Helloworld selling \$399 return fares to Hawaii on Air New Zealand as price war with Hawaiian Airlines gets red hot

14 Feb, 2019 12:03am 3 minutes to read



Legacy of 2018 increases in airlift to Hawai'i and airline competition created a change in perception and customer mix



HTO working with trade partners to focus on the higher yielding, experiential customer

# TRAVEL TRENDS

## General Travel Trends:

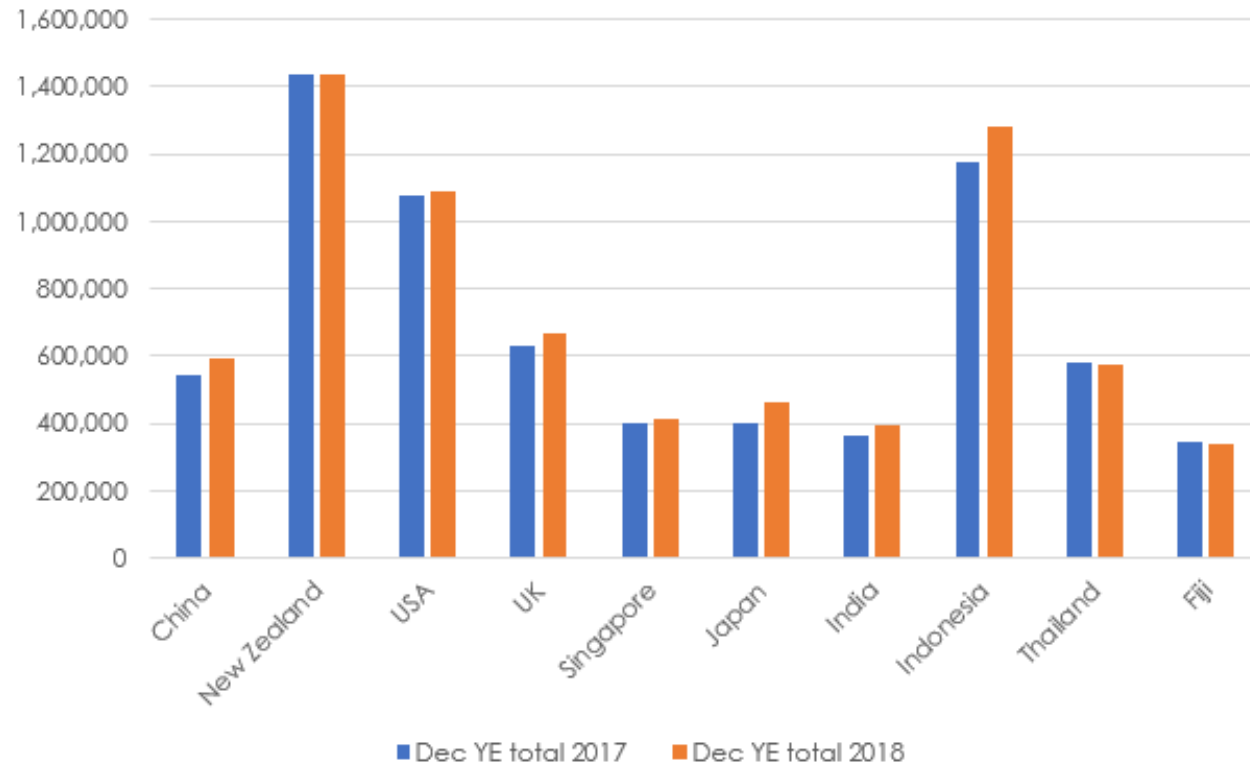
- Hawai'i has strong emotional equity and brand momentum compared to competitor destinations – Fiji, Bali, Thailand
- More than a tropical getaway - associated with awe inspiring nature, adventure and a family and friends destination
- Path to purchase is not linear. Consumers research across multiple digital channels. Still a preference to book via travel agent or OTA



Source: My Travel Research "Powering the next phase of growth for Hawai'i in the Australian market" Jan 2019

# TRAVEL TRENDS - AUSTRALIA

Australian Outbound Travel in 2017/ 2018



Source: Australian Bureau of Statistics

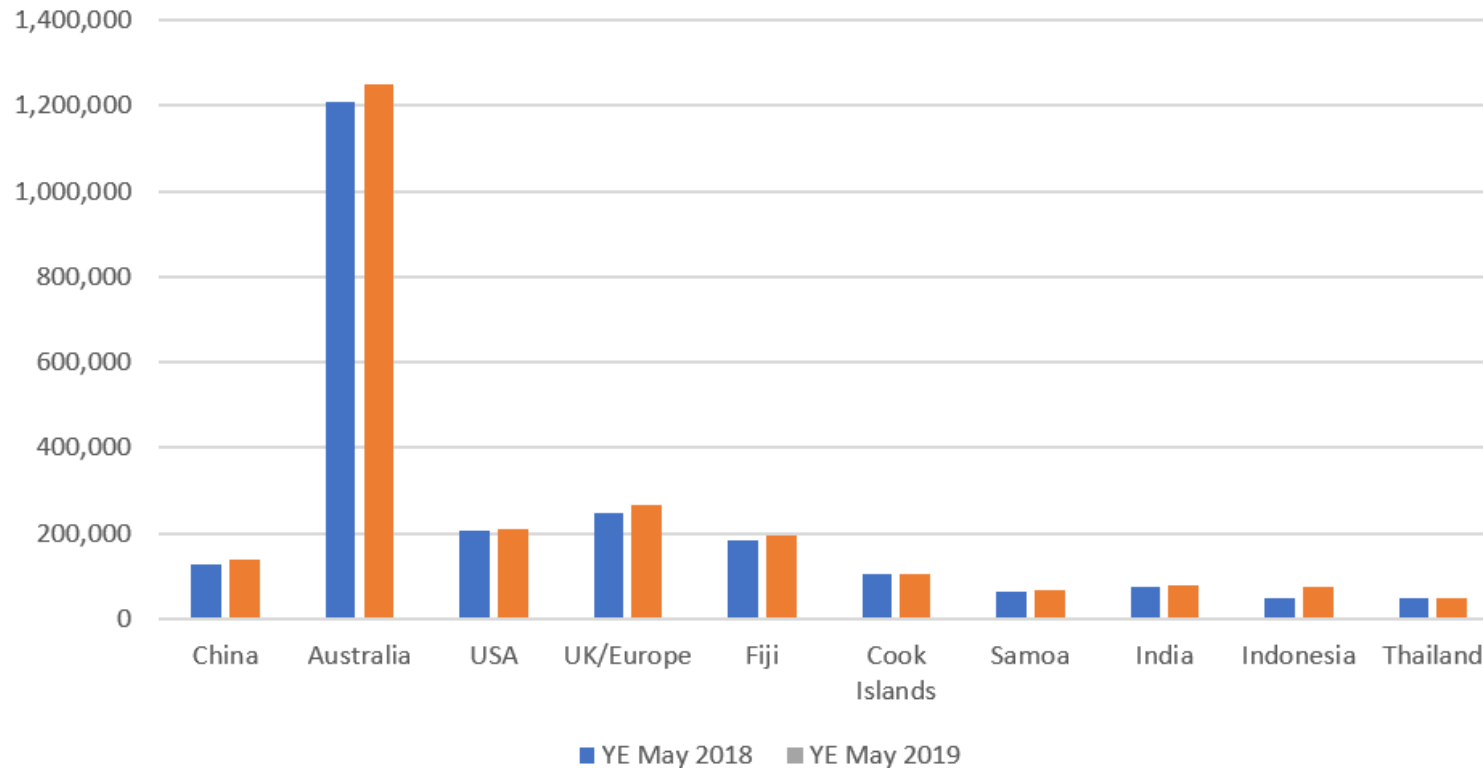
Top 5 USA destinations - Australian Inbound Travel 2018

State	%
California	44.54%
The Hawaiian Islands	27.18%
New York	22.93%
Nevada	19.12%
Florida	11.12%

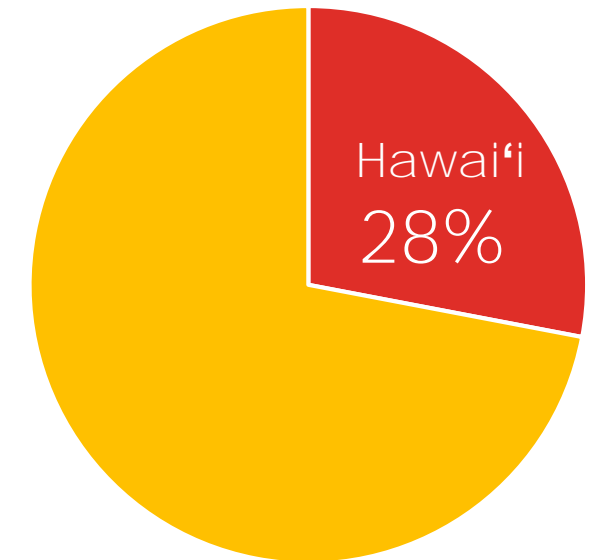
Source: US Dept of Commerce

# TRAVEL TRENDS – NEW ZEALAND

## New Zealand Outbound Travel



## New Zealand inbound travel to the U.S 2018



↑ 15%

# TARGET AUDIENCE

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# TARGET AUDIENCE



29%  
AS A COUPLE



24%  
FAMILY WITH  
CHILDREN



20%  
OTHER FAMILY OR  
FAMILY & FRIENDS

Average age: 36 years old

# TARGET AUDIENCE



AUSTRALIA

Eastern Seaboard: Sydney, Brisbane and Melbourne and major regional centres



NEW ZEALAND

Auckland, Wellington, Waikato/Bay of Plenty, Christchurch



# TARGET AUDIENCE

## HIGH-VALUE TRAVELERS



### **AUTHENTIC EXPERIENCERS\***

- Tangible engagement
- History and culture
- Educated
- Mature traveller



### **CULTURAL EXPLORERS\***

- Learning and discovery
- Local immersion
- Educated
- Families and couples

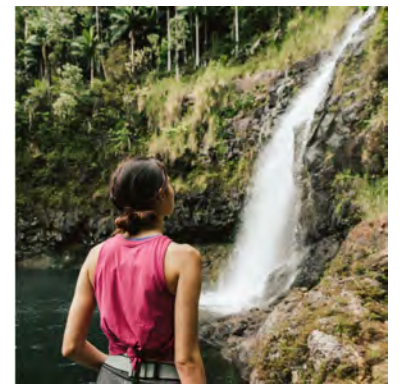


# CONSUMER STRATEGY

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# CONSUMER STRATEGY

Six Hawaiian Islands, Infinite Experiences



# CONSUMER STRATEGY

General focus:

- Experience led strategy
- Focus on multi-island dispersal
- Highlighting Hawai'i's outstanding nature
- Branded content across HTO channels
- Multi channel integrated campaigns



# CONSUMER STRATEGY

## Public Relations:

- Media famils aligned to brand themes
- Key story angles across mainstream print and digital channels
- National broadcast opportunities including television and radio



# CONSUMER STRATEGY



120,000 fans



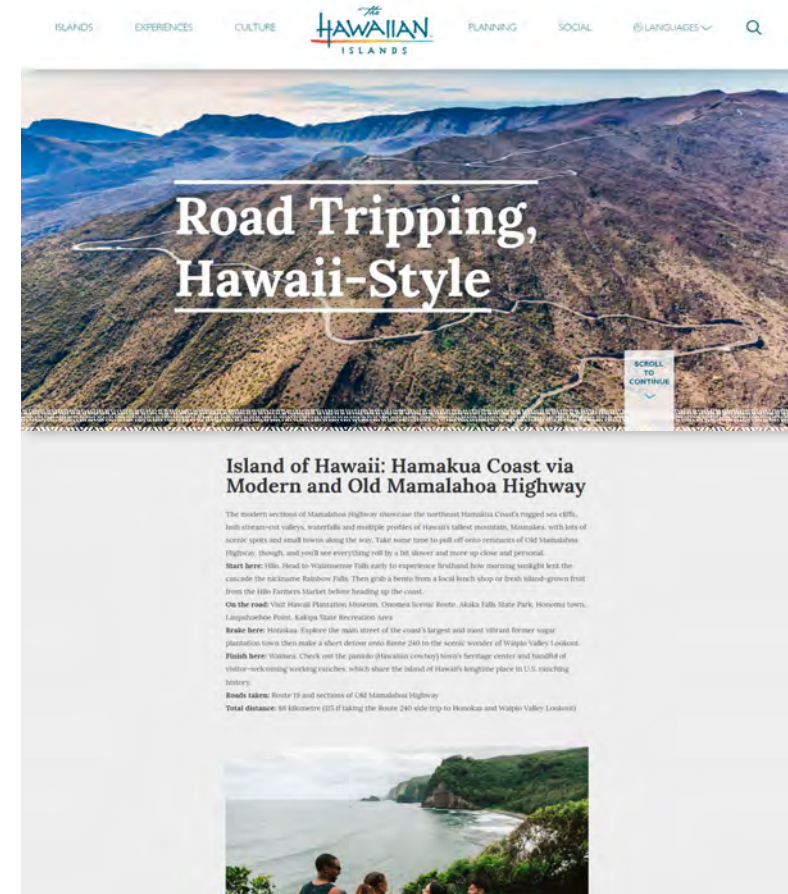
29,000 followers



170,000 subscribers



2 blogs per month

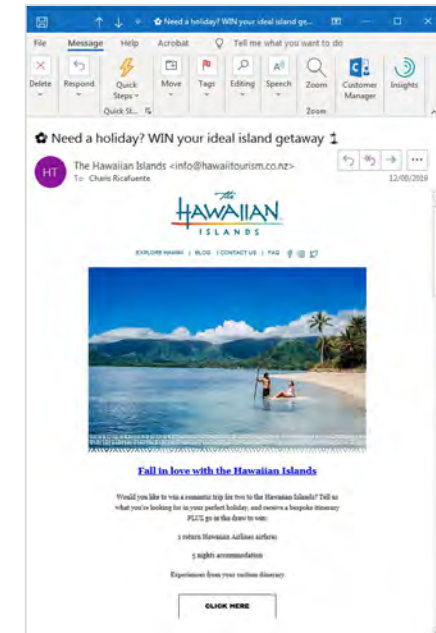
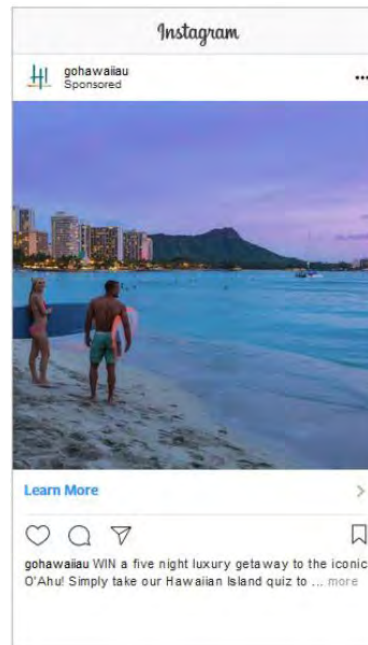


# CONSUMER STRATEGY

Inspiration – Trip Discovery



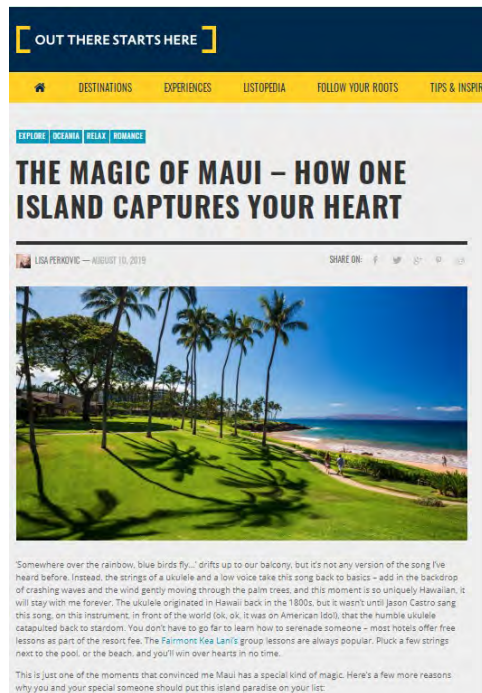
HTO channels



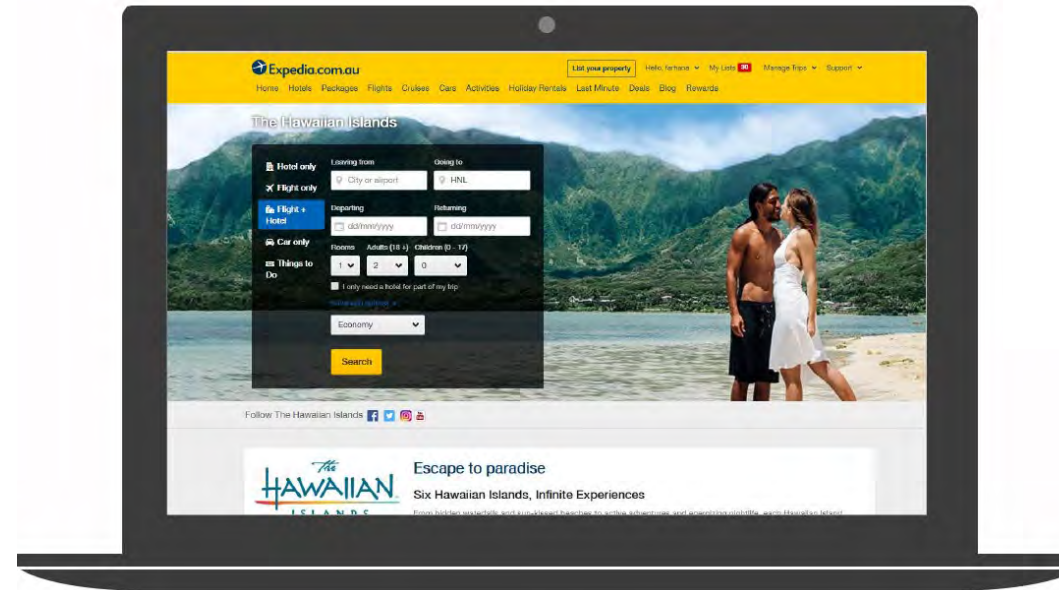


# CONSUMER STRATEGY

Public Relations



Trade: Call-to-action



# CONSUMER STRATEGY

Targeted approach:

- Increased investment in social media – paid social
- Measuring trends on our digital channels - Social Media and EDM
- Market specific research informs content curation



# CONSUMER STRATEGY

## Campaign Examples:

- Partner with non-tourism brands to leverage channels and activity e.g. Billabong
- Themes around adventure, nature and wellness that appeal to our high value traveller segment
- Multi-island campaign focusing on experiences
- Responsible tourism



# CONSUMER STRATEGY

## Lei Day activation

- Appeal to cultural explorers and authentic experiencers
- May Day activity highlighting Hawaiian Culture and the spirit of Aloha
- Key brand campaign providing consumers an immersive experience of Hawai'i in Oceania



# TRADE STRATEGY

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# TRADE STRATEGY

- Consumers research across multiple channels yet prefer to book Hawai'i via travel agent or OTA
- Trade play a role in inspiring, informing & educating the traveler
- Motivate 'preferers' to choose Hawai'i over another destination
- Travel agents are influential in promoting neighbor island visitation



# TRADE STRATEGY

Engagement tactics:

- Trade education:
  - Online and face-to-face
  - Support travel brands that service high value travelers – Travel agent conferences
- Trade Shows
  - Month of Lei
  - Aloha Down Under Roadshow
- Famils – Travel agents and product managers



# TRADE STRATEGY

Engagement tactics:

- Cooperative campaigns:
  - Influence branding via external channels
  - Support our key trade partners and top producers – OTAs and retail travel agencies
  - Multi-island content/packages
  - Focus on increasing length of stay and spend in market

**helloworld TRAVEL**  
THE TRAVEL PROFESSIONALS

## SIX HAWAIIAN ISLANDS, INFINITE EXPERIENCES

RETURN & FLIGHTS INCLUDED

There are six major islands to visit in Hawaii: Kauai, Oahu, Molokai, Lanai, Maui and the island of Hawaii. Each has its own distinct personality, adventures, activities and sights. Say Aloha and explore the islands to find your own heavenly Hawai'i experiences with these EXCLUSIVE Helloworld Travel deals.

5 NIGHTS ALOHA! A DISNEY RESORT & SPA ON O'AHU	8 NIGHTS DISCOVER O'AHU & MAUI	10 NIGHTS O'AHU & THE ISLAND OF HAWAII
<p><b>INCLUDES</b></p> <ul style="list-style-type: none"> <li>Round economy airfare to Honolulu (fly to other cities from Honolulu)</li> <li>5 nights stay at a Disney Resort &amp; Spa***** in a Standard Room</li> <li>Access to the Hukilau Lani Maui Spa and/or Ziplines</li> <li>1 night stay at a Disney Resort &amp; Spa***** in a Standard Room</li> <li>1 Day Rental Car for Group Compact (see how we work on the island of Oahu)</li> <li>EXCLUSIONS: Taxes, government car upgrade to a Group Compact (see how we work)</li> </ul> <p><b>SAVE UP TO \$2,689*</b> per person \$1,000 - \$1,500 per person</p>	<p><b>INCLUDES</b></p> <ul style="list-style-type: none"> <li>Round economy airfare to Honolulu (fly to other cities from Honolulu)</li> <li>8 nights stay at a Disney Resort &amp; Spa***** in a Standard Room</li> <li>Access to the Hukilau Lani Maui Spa and/or Ziplines</li> <li>1 night stay at a Disney Resort &amp; Spa***** in a Standard Room</li> <li>1 Day Rental Car for Group Compact (see how we work on the island of Oahu)</li> <li>EXCLUSIONS: Taxes, government car upgrade to a Group Compact (see how we work)</li> </ul> <p><b>SAVE UP TO \$2,965*</b> per person \$1,000 - \$1,500 per person</p>	<p><b>INCLUDES</b></p> <ul style="list-style-type: none"> <li>Round economy airfare to Honolulu (fly to other cities from Honolulu)</li> <li>10 nights stay at a Disney Resort &amp; Spa***** in a Standard Room</li> <li>Access to the Hukilau Lani Maui Spa and/or Ziplines</li> <li>1 night stay at a Disney Resort &amp; Spa***** in a Standard Room</li> <li>1 Day Rental Car for Group Compact (see how we work on the island of Oahu)</li> <li>EXCLUSIONS: Taxes, government car upgrade to a Group Compact (see how we work)</li> </ul> <p><b>SAVE UP TO \$3,175*</b> per person \$1,000 - \$1,500 per person</p>

ASK US IN STORE TODAY ABOUT OTHER GREAT HAWAII DEALS

HAWAIIAN AIRLINES | helloworld TRAVEL



MCI

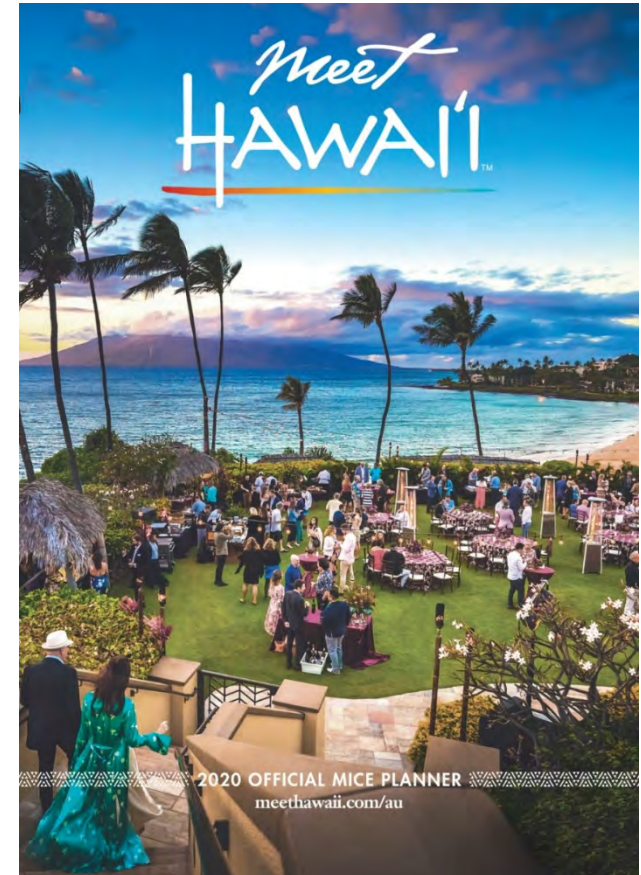
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HAWAII TOURISM™  
OCEANIA

# MCI

## Deployment:

- Dedicated MCI resources building on existing in market relationships
- Advertising and promotion via online channels, hosted events, FAMs and branded collateral
- Hawai'i partner collaboration and product expertise



# MCI



## Key Vertical Segments:

- 3rd party meeting planner
- Automotive
- Entertainment/Media
- Healthcare/medical
- Sports
- Franchise/Direct Selling

## Lead Development Strategy:

- Grow network of PCO relationships
- Meet Hawai'i Down Under Sales Mission
- Conference and tradeshow
- HTO events

# RESPONSIBLE TOURISM

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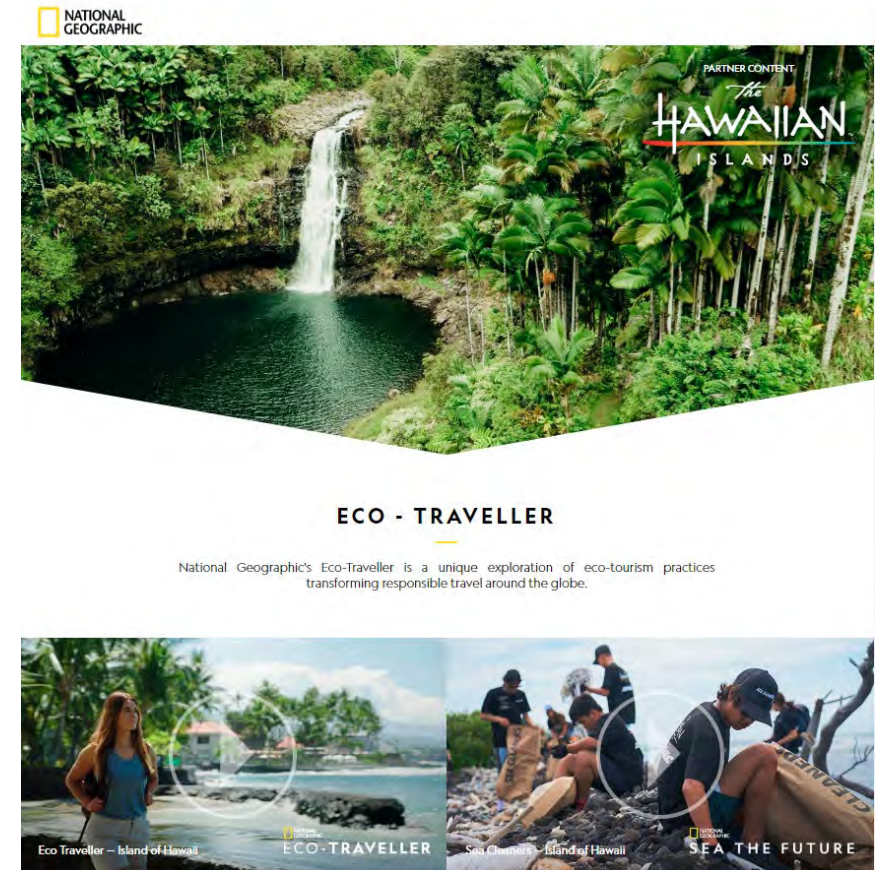
# RESPONSIBLE TOURISM

Distribution of Rooted, Kuleana, and Travel Tips video:

- Amplified across paid and organic social media
- Included in trade and consumer e-communications
- Destination updates and Aloha Down Under

Marketing content and PR

- Editorial and advertorial consumer content
- Content and imagery in HTO produced content



# RESPONSIBLE TOURISM

## Sea Cleaners Initiative:

- Partnership with non-profit environmental company, Sea Cleaners
- A true collaboration – HTA, HTO, HTJ, Industry partners, media
- Respecting & protecting culture & environment
- An exchange between Pacific Rim countries and Hawai'i around the issue we have with plastic rubbish in the Pacific Ocean
- Expand the Pacific Rim connection to Hawai'i





# NATIONAL GEOGRAPHIC TRAVELLED TO HAWAI'I



Brand Marketing



Hawaiian Culture



Natural Resources



Community





# 2020 BMP - EUROPE

Niamh Walsh, Senior Account Director

Holly Jordan, Account Manager



# OVERVIEW- MARKET CONDITIONS

## Currency exchange

- GBP to USD: \$1.28
- Euro to USD: \$1.12



BREXIT 31<sup>st</sup>

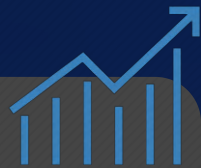
JANUARY 2020



## GDP

UK: +1.5%

Germany: +1.2%



## Interest rates

UK: 0.75%

Germany: 0%



## Unemployment

UK: 4%

Germany: 3.3%



# TRAVEL FORECAST LIMITED BREXIT IMPACT

37%

UK travelers who believe Brexit will have an impact on travel to Europe

29%

UK travelers who believe Brexit will have an impact on travel to int'l destinations other than Europe

# OUTBOUND TRAVEL FROM EUROPE

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Top 10 Source  
Markets  
Europe Makes Up  
Well Over 50% of  
All International  
Departures



1. China



2. USA



3. Germany



4. UK



5. France



6. Russia



7. Australia



8. Italy



9. Spain



10. Canada

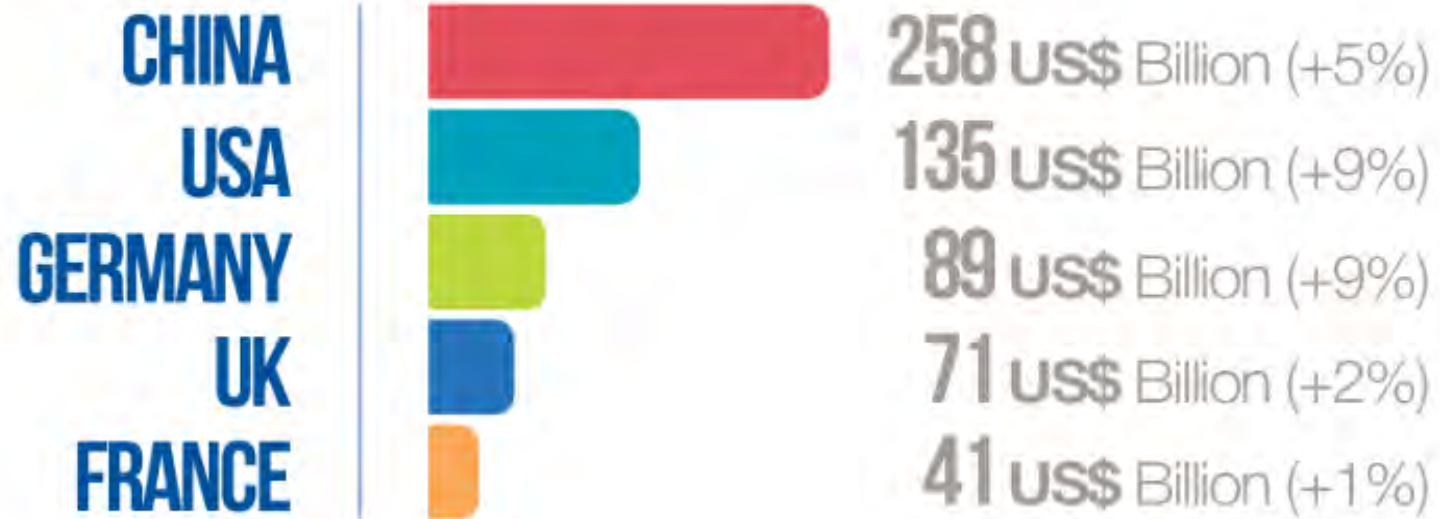
European  
Outbound Travel  
Reached  
An All Time High  
in 2018

531 MILLION  
Outbound Trips in 2018

+5.3%

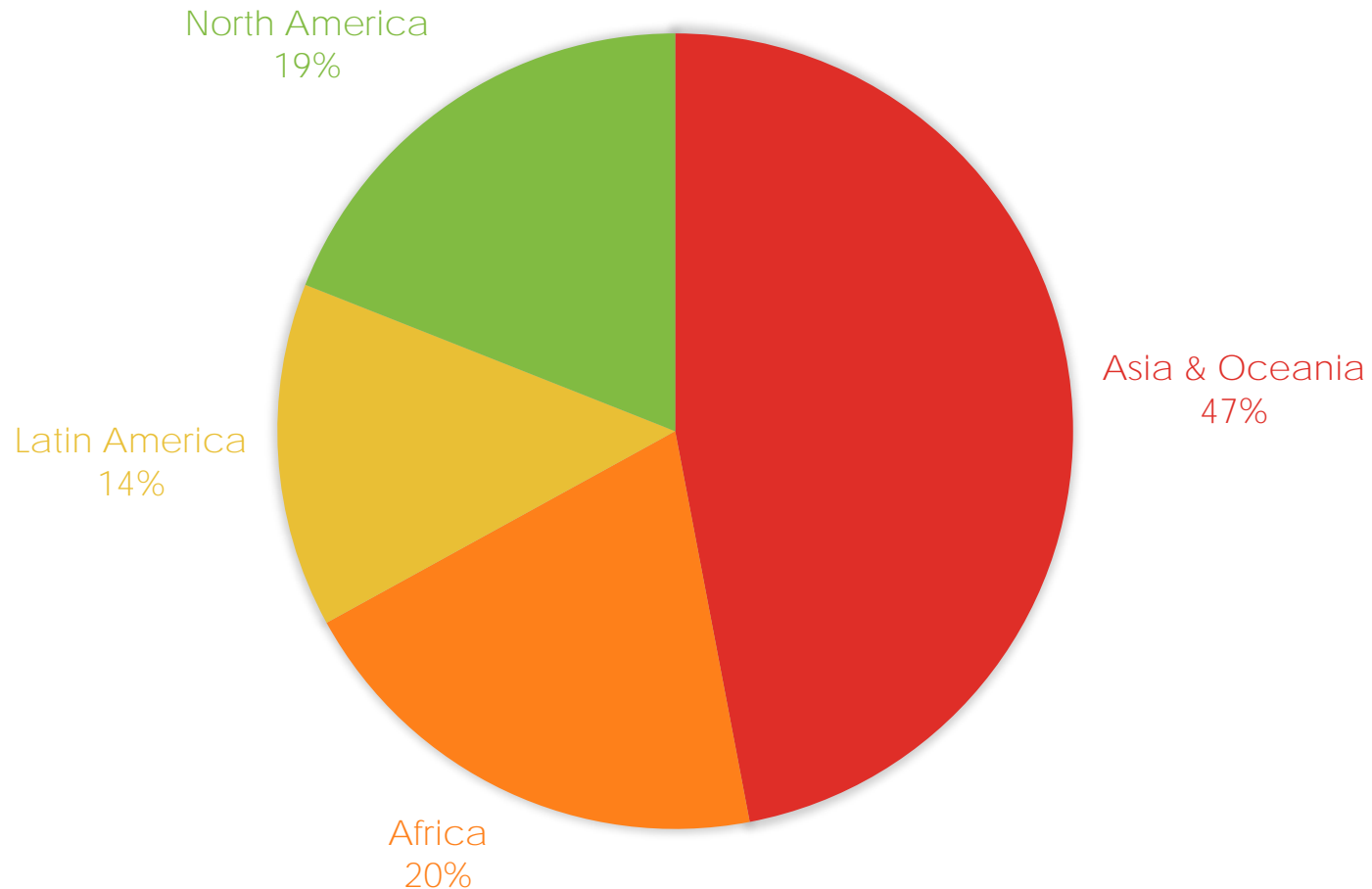
Source: World Travel Monitor®, 2018, IPK International

# WORLD'S TOP TOURISM SPENDERS





# DESTINATIONS OF EUROPEAN OUTBOUND TRAVELERS IN 2018



Europe – U.S.  
Capacity has grown at an  
above-average rate

 9.3%

406 FLIGHT  
ROUTES

to the U.S. from European airports

91.9 MILLION

Seats

7.8 MILLION

additional seats in the last two years



AVIATION ACCESS

64 MILLION

Journeys Between USA And Europe

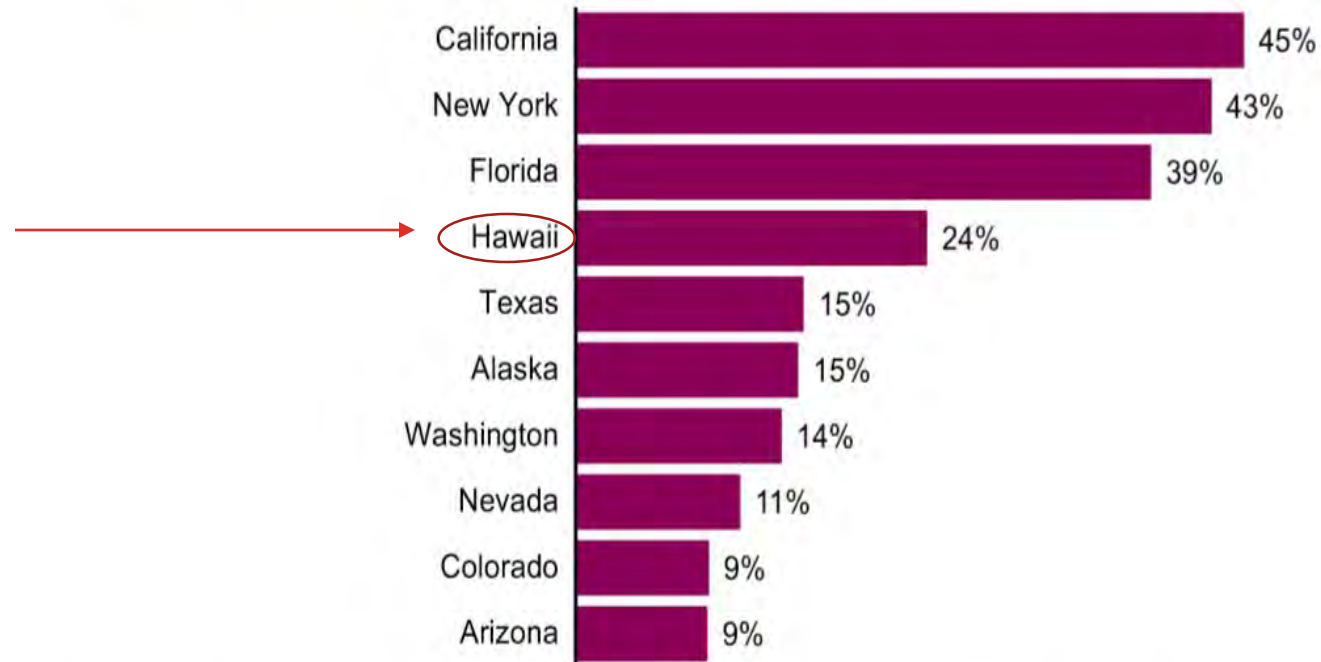
35 MILLION

Of Which Are Indirect

Source: World Travel Monitor®, 2018, IPK International

# DESIRE AND INTENT WHERE DO EUROPEANS WANT TO TRAVEL TO?

## Destination Interest - Top 10 States



Question: You indicated in a previous question that you have interest in visiting the U.S. sometime in the future. Which U.S. state(s) are you interested in visiting?

Base: U.K. intercontinental travelers with interest in visiting the United States (N=947)

Source: Brand USA Market Intelligence Study

Phocuswright Inc. on Behalf of Brand USA • 149

Market Intelligence Survey 2018 Results Market Profiles

Phocuswright



VisitTheUSA.com



# TRAVEL WITH A GREATER SENSE OF PURPOSE

Many travellers now identify sustainable travel as a key element in their booking decision

45% of UK Travelers

57% of German Travelers

# DISPERSAL AND REPEAT VISITATION

70%

of travellers to the US are combining  
two or more destinations

## MILLENNIALS MAKE UP

40% of Europe's  
Outbound Travel

72% of Millennials would spend  
on experiences rather than  
possessions



# COMPLEXITY OF WHAT INFLUENCES DECISION MAKING

Every travel booking is now influenced by

45 Digital Touchpoints

and, before making a travel booking,

52 Related Travel Queries

are conducted

Source: Adara's Luxury Travel Consumer report

HAWAII TOURISM  
EUROPE

# TARGET AUDIENCE

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# TARGET AUDIENCE UK

High Value Travelers - 30% based in London

27%

of UK consumers planned to spend more on their holiday this year

16%

of these plan to visit North America

HAWAII TOURISM  
EUROPE

# TARGET AUDIENCE GERMANY

High Value Travelers - predominantly couples/older families

33%

of Germans plan to spend between \$2,500 and \$4,999 on their next Intercontinental trip

# TRIP PERSONA TARGETS

WANDER  
LUSTERS

Travelers looking for  
**'new' destinations**  
and new  
experiences

AUTHENTIC  
IMMERSERS

Conscientious  
travelers, nature  
lovers, seeking  
cultural immersion  
and local interaction

EXCLUSIVITY  
THRIVERS

Core need is to relax  
and re-energize  
through authentic,  
historical and cultural  
experiences

# CONSUMER STRATEGY

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# CONSUMER STRATEGY

Influence and educate target audience through PR, promotions and paid media

**'Tradigital approach'**

Build and elevate brand awareness

Inspire consumers

Educate travelers on the uniqueness of the Hawaiian Islands

Focus on the rise of wellness travel and its links to Hawaiian culture

HAWAII TOURISM

THE HONOLULU

# MARKETING CHALLENGE

How do we stand out in a sea of sameness?







# OUR MISSION

Elevating and amplifying The Hawaiian Islands brand internationally

HAWAII TOURISM  
EUROPE

# CORE BRANDING MESSAGE

## Aloha Spirit

*What does Aloha mean to you?  
What makes Hawai'i unique?*

# CONSUMER CAMPAIGN



Integrated partnership with Just Breathe

Six Hawai'i inspired podcasts, featuring traditional Hawaiian chants, delving into the individual culture and stories of each island...

# PR & SOCIAL MEDIA

Press materials and proactive pitching

Broadcast opportunities

Influencer engagement

Social media content and creation

Regular face-to-face media meetings

Group and individual press trips

# TRADE STRATEGY

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# TRADE STRATEGY

Many UK and German consumers (particularly HVT's) continue to book through retail agents. It is therefore key that we continue to educate, motivate and incentivise the European travel trade, to promote Hawai'i to their customers.

# SPOTLIGHT ON THE UK DEMOGRAPHIC SPLITS

*'I have used an agent to book international travel in the past 12 months...'*

84%

of millennials



88%

of Generation Xers



97%

of Baby Boomers



# SPOTLIGHT ON GERMANY DEMOGRAPHIC SPLITS

44%

of the population are  
Generation Xers with a  
preference to plan and  
book through travel  
professionals





# TRADE STRATEGY OVERVIEW

## Share The Aloha Challenge...

Agents from the UK and Germany will compete to win a place on our Trade Fam, where participants will document their trip on social media, using the hashtag #sharethealoha, taking part in voluntourism activities

# RESPONSIBLE TOURISM

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# RESPONSIBLE TOURISM

## Our 2020 Mission

- Incorporate responsible tourism messaging into all of our trade activity
- Work with the trade to promote sustainability
- Proactively pitch sustainability travel
- Distribute Rooted and Kuleana videos with trade and media to educate consumers

*It is our kuleana to positively impact the Hawaiian islands by preserving the values and interests of the local community*

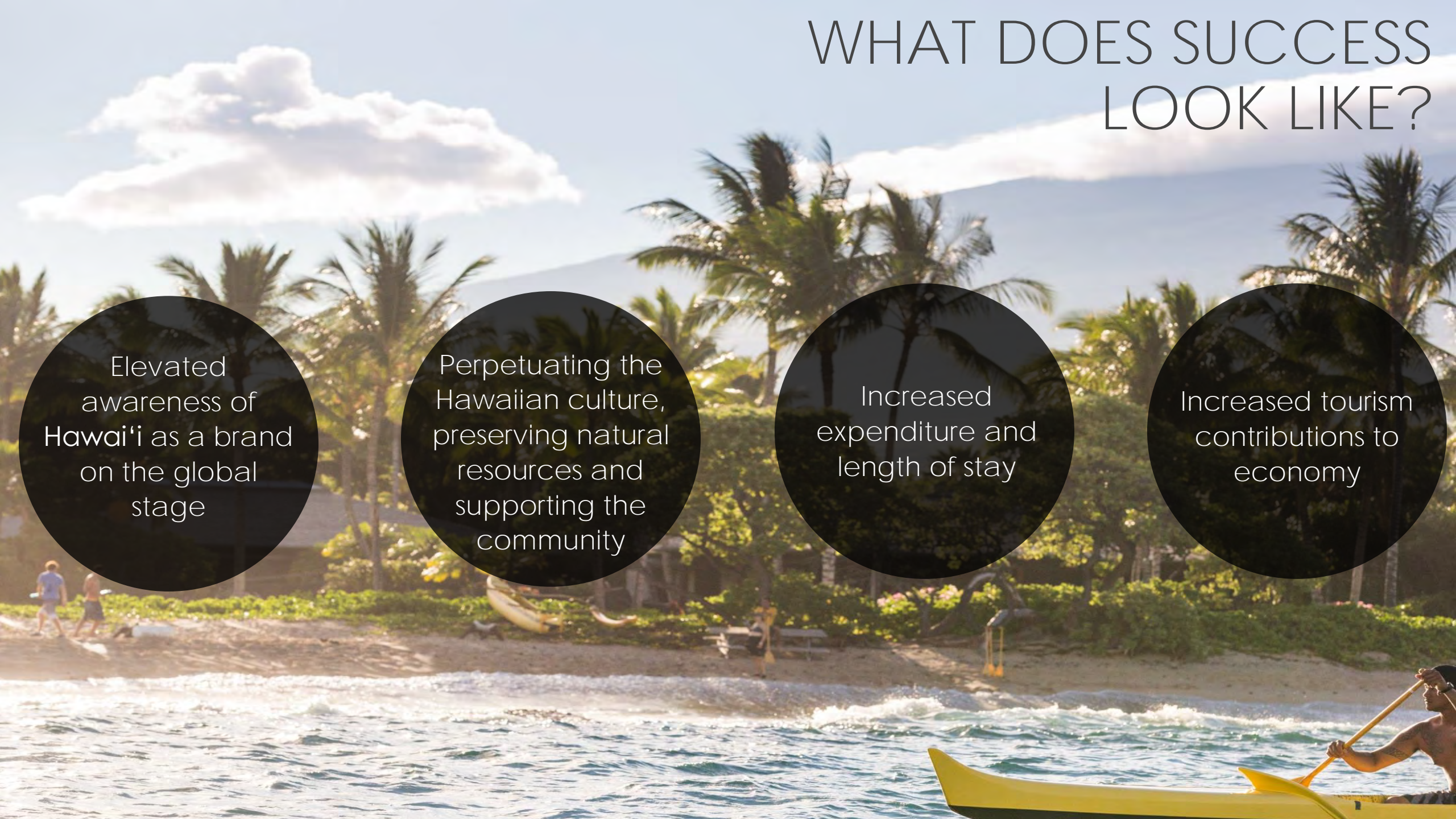
# WHAT DOES SUCCESS LOOK LIKE?

Elevated  
awareness of  
Hawai'i as a brand  
on the global  
stage

Perpetuating the  
Hawaiian culture,  
preserving natural  
resources and  
supporting the  
community

Increased  
expenditure and  
length of stay

Increased tourism  
contributions to  
economy





# 2020 BMP - SOUTHEAST ASIA

Kelvin Ong, Regional Director

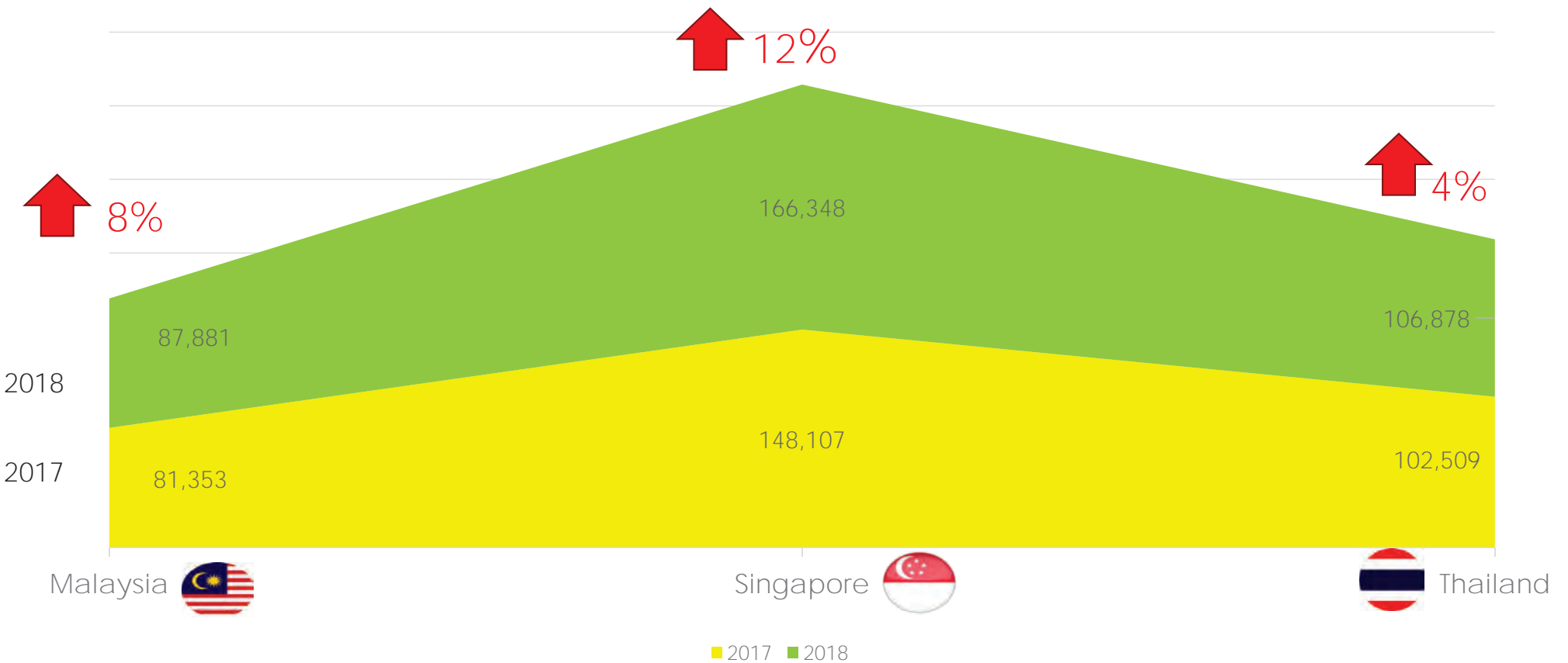
Dan Darby, Trade Marketing & MCI Manager

# MARKET CONDITIONS

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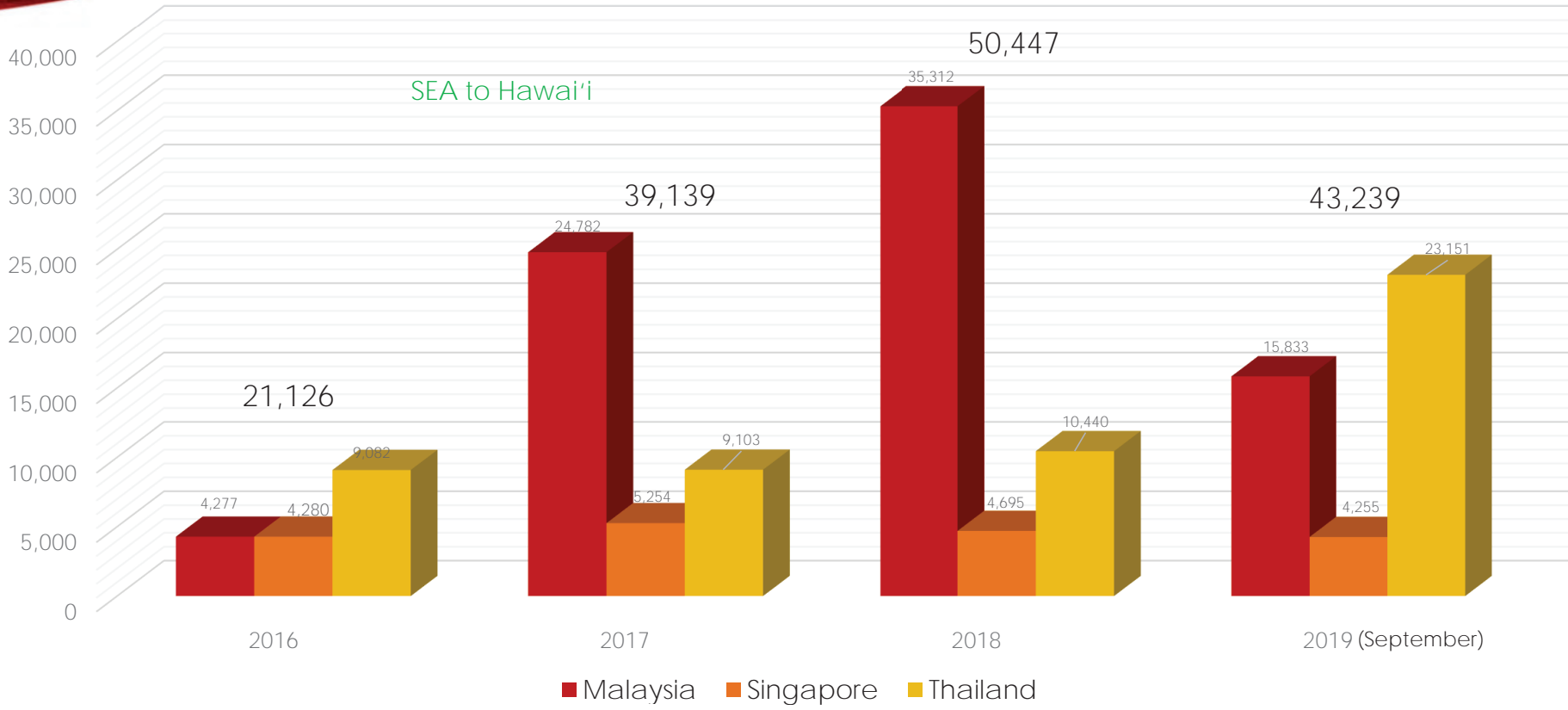


# OUTBOUND TO USA



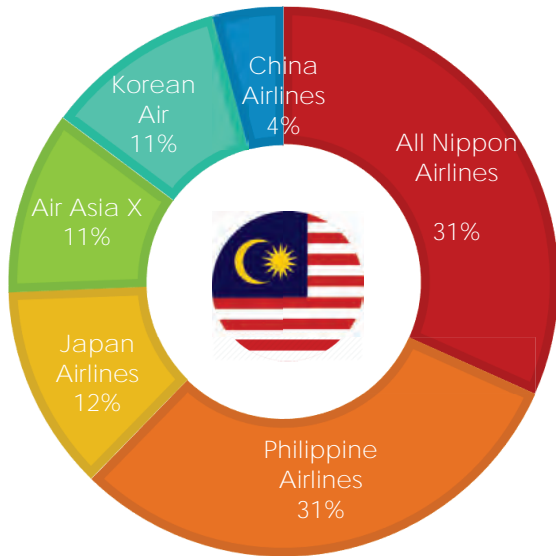
Source:  
U.S. National Travel and Tourism Office

# OUTBOUND TO HAWAI'I

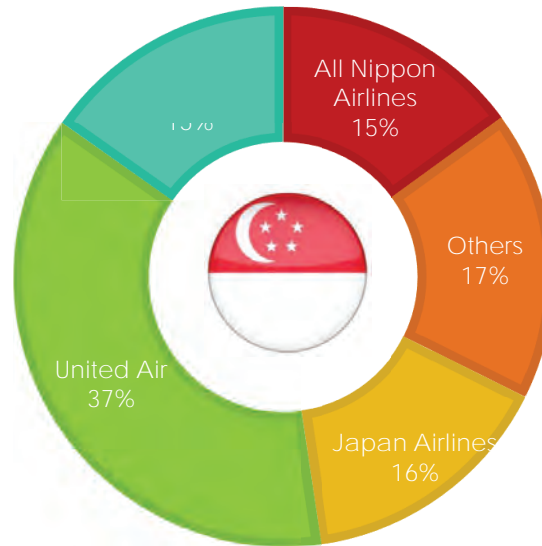




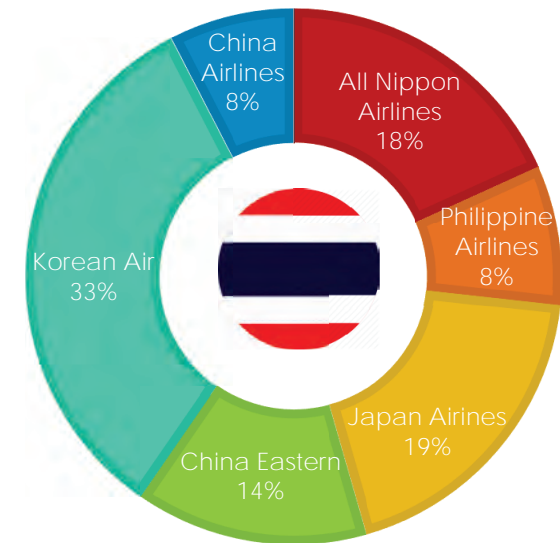
# AIRLIFT ACCESSIBILITY TO HAWAI'I



**Flight frequency: 59 weekly**  
**Seats capacity: 14,216 / week**



**Flight frequency: 40 weekly**  
**Seat capacity: 9,505 / week**



**Flight frequency: 32 weekly**  
**Seats capacity: 7,768 / week**

# TRAVEL TRENDS

---



# MEDIA PREFERENCE

63%

of the 662 million population of SEA use Internet daily



Spend an average of **8 hours 5 mins** online which of the **4 hours** are spent on mobile



Newspapers are still a credible source of information



Radio is still one of the main go to channels S.E.Asian tune in for an average of **14 hours weekly**

Source: Digital in Southeast Asia, WeAreSocial/Hootsuite 2019; SEA Media Landscape by Nielsen 2018; Business Today , 2019

Travelers initiate a GOOGLE search on lifestyle, social media sites for inspiration

64% Watch destination video content to get inspiration

70% Travelers rely on reviews to decide an attraction/restaurant to visit

40% Silver Travelers said their travel decision was influenced by newspaper informative ads

Source: Adara Luxury Travel Behavior

HAWAII TOURISM  
SOUTHEAST ASIA

Top 5 go-to channels for destination inspiration



Source: Hootsuite 2019

## TRAVEL TRENDS

**1** Halal travel is on the rise as Muslims are increasingly seeking out travel packages that are Muslim-friendly

**2** Travelers focus more on an Instagrammable experiences than ever

**3** Southeast Asian travelers prefer to book via Online Travel Agencies (OTA) as it has given them more flexibility in planning their trip

**4** Southeast Asian travelers are increasingly opting for shorter and more frequent breaks

**5** Conscious travel is on the rise. SEA travelers are seeking more than personal fulfillment, but also contributing to the local community

**6** There is a growing trend in SEA women travelers and this is more prominent with young working women

Source: FlyKILA, 5 trends shaping travel in 2019

# TARGET AUDIENCE

---



# TARGET AUDIENCE



## Affluent Travelers

- Aged from 28 to 40
- Annual income: US\$40,000- US\$120,000
- Make an average of 12 international trips per year
- 46% of them spend their income on travel and leisure
- Prefer to rely on travel agencies for booking and itinerary planning



## Romance Lovebird

- Travels around the world celebrating special occasions
- Digital savvy & source travel inspiration online
- Anniversary celebration and renewing marriage vows have become an emerging trend among Southeast Asian travelers



## Silver Travelers

- Financially stable with the luxury of time
- Make an average of 27 travel days per year
- 66% of their travel destination are influenced by informative ads
- Prefer to indulge in a more relax yet luxurious travel experience

# CONSUMER STRATEGY

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# CORE BRANDING MESSAGE



HAWAII TOURISM  
SOUTHEAST ASIA

# CONSUMER STRATEGY

Based on the findings and key branding message of Discover Aloha, the general approach for our consumer strategy involves

## 01 CURIOSITY

Entice the curiosity of SEA travelers to discover more about the Hawaiian islands and the unique FEEL of each island.



## 02 DISCOVER

SEA travelers to discover the true meaning behind the word "Aloha" to lead to a better understanding and appreciation of the authentic Hawaiian culture



## 03 INSPIRE

By educating and inspiring travelers to understand the true and authentic Hawaiian culture and the unique FEEL of the six islands of Hawai'i, travelers will learn to embrace the spirit of aloha



## 04 RESPONSIBLE

As a result, SEA travelers will be more mindful when they travel in Hawai'i. They will be respectful to Hawai'i's culture and heritage, its people and community



HAWAII TOURISM  
SOUTHEAST ASIA

# CONSUMER STRATEGY



## 1 LEVERAGE ON DIGITAL PRESENCE

- Expand brand visibility online that focus on our target audience from working women looking for a retreat, to couple looking for romantic getaway

## 2 TRADITIONAL MEDIA

- Media such as newspaper, magazine and radio are still an important outlet for the silver travelers in the Southeast Asia region

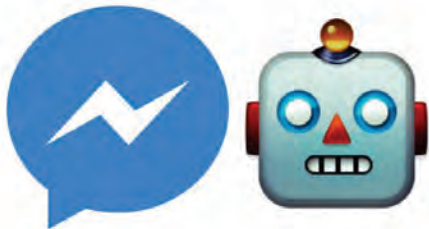
## 3 BRAND PARTNERSHIP

- Tapping into our partner brand's loyal consumer. For example, HTSEA will be running a campaign with GoPro that showcase Hawai'i cultural and natural resources

## TOOLS TO REFINE TARGETING



NETBASE



Leverage on these tools to track, analyze and reach our target audience in order to obtain real-time reporting/results.

HAWAII TOURISM  
SOUTHEAST ASIA

# CONSUMER CAMPAIGNS

## Hawai'i Community Lū'au

To celebrate Hawai'i Lei Day festival and promote Hawaiian culture & gastronomy

## Aloha Facebook ChatBot

Tap into AI learning to further understand the behaviors of its potential travelers and their interest on Hawai'i

## SEA GoPro x Influencer Campaign

Promote Hawai'i's cultural & natural resources and festivals & events by tapping into GoPro's massive loyal consumers & Influencers

## #DiscoverAloha Digital Interactive Campaign

Leverage on interactive digital game to educate and promote authentic Hawai'i cuisine in conjunction with Food and Wine festival.



# TRADE STRATEGY

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# WHY TRADE IS STILL IMPORTANT



## HUMAN ELEMENT

SEA travelers still prefer trade for accountability and assistance



## MCI

Large groups still rely on tour operators

## CO-OP CAMPAIGN

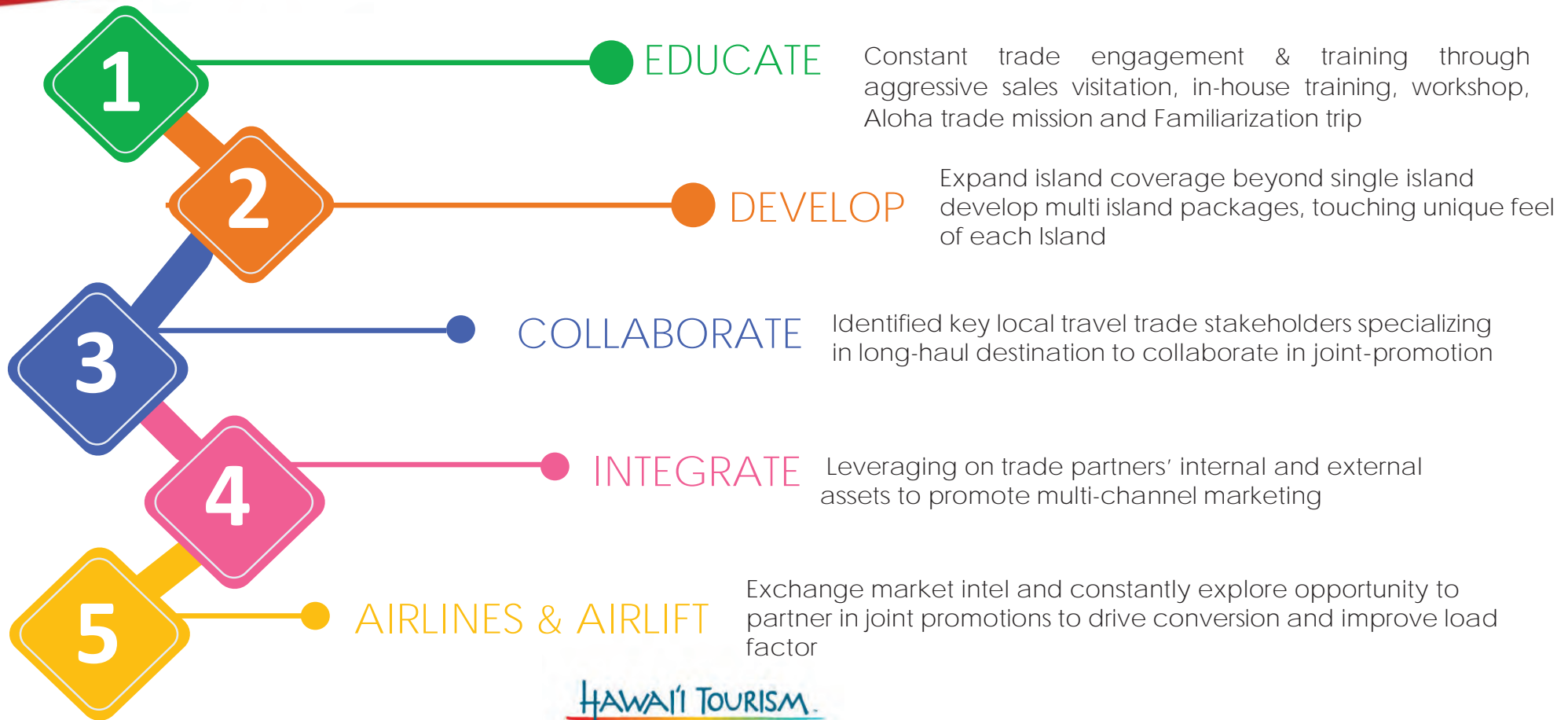


Opportunity to leverage trade partners' platforms & resources

## AFFLUENT TRAVELER

Planning made easy with trade

# ENGAGEMENT WITH TRADE





MCI

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HAWAII TOURISM.  
SOUTHEAST ASIA

# DEPLOYMENT








HTSEA will continue to promote and develop MCI leads for Hawai'i in all countries in Southeast Asia with the main focus in Malaysia, Singapore & Thailand.

# LEAD DEVELOPMENT



MCI  
in Southeast  
Asia

-  **SUPPORT**  
Giving necessary in-kind support especially during bidding. E.g. lei garlanding, hula performance
-  **LEADS**  
Working with airlines and DMC in getting new leads.
-  **WORKING DIRECT WITH CORPORATE**  
Destination awareness to incentive prone corporate companies in Southeast Asia
-  **MCI EDUCATION**  
Education to the DMC that will include MCI specific familiarization trip to Hawai'i
-  **WORK WITH GLOBAL MCI TEAM**  
Collaborate and support attendance building, develop leads for citywide groups

# RESPONSIBLE TOURISM

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# RESPONSIBLE TOURISM

## ❑ PR & Communication Initiatives

- Sending press release with story angles on responsible tourism
- Media content partnership for both MCI and Leisure touch base topics on society, economy, and environment impact.



## ❑ IGTV Episodes

- Rooted and Kuleana series will be repurposed and adapted to IGTV format for the SEA audience.

## ❑ Regional FAM

- Integrating trade, media and influencer FAM trip that incorporate areas of either society, economy, or environment impact.



HTSEA will ensure its core branding message and all promotions align with HTA's 4 pillars.

BRAND  
MARKETING

COMMUNITY

HAWAIIAN  
CULTURE

NATURAL  
RESOURCES



HAWAII TOURISM  
SOUTHEAST ASIA



# 2020 BMP - TAIWAN

Molly Jou

Trade & MCI Marketing Director

# MARKET CONDITIONS

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# MARKET OVERVIEW

2.9% ↑  
GDP Growth



3.8% ↓  
Unemployment Rate



63% ↑  
Outbound Visitors



USD\$1 = TWD\$30  
Exchange Rate



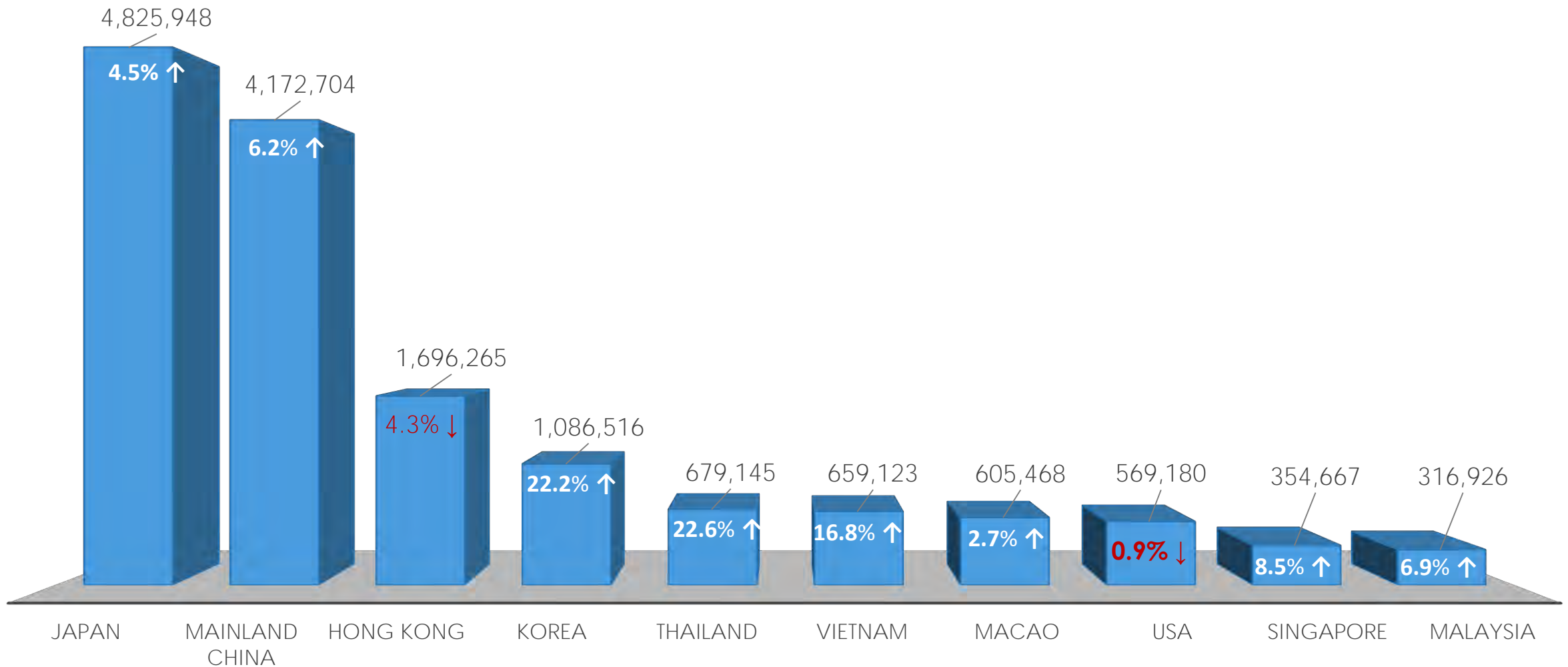
3% ↑  
Disposable Income



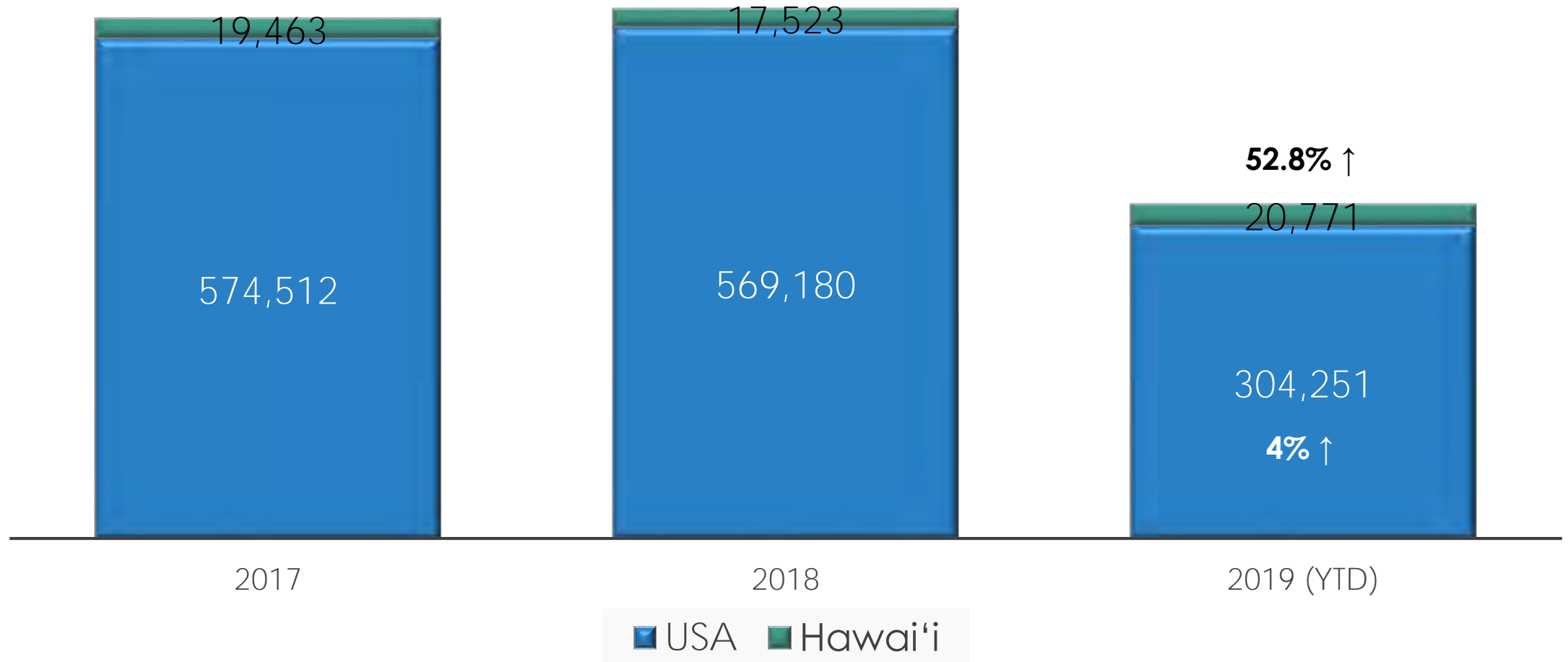
50.3% ↑  
Mobile Payment



# 2018 TAIWAN'S TOP 10 OUTBOUND TRAVEL DESTINATIONS



# INCOMING TAIWAN VISITORS



# FLIGHT SYNOPSIS



Taipei – Honolulu  
A350-900 Flight

Year	Frequency	Capacity	Passenger	Load Factor
2018	104	31,824	25,660	80.6%
2017	105	31,223	27,277	87.4%
2016	105	32,475	26,101	79.7%



# TRAVEL TRENDS

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# MARKET TRENDS

Living Green



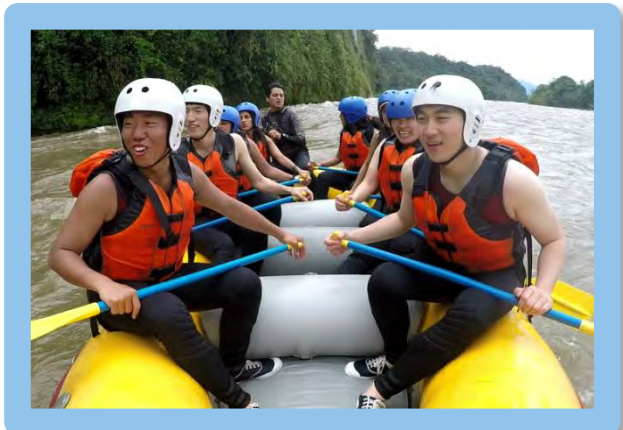
Rapid Mobilization



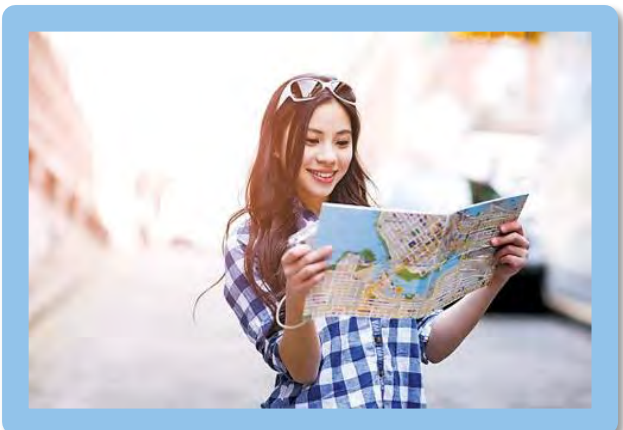
FIT Boom



Experience First



Travel Solo



# CHALLENGES

Southbound Policy



Intense Competition



Presidential Elections



# TARGET AUDIENCE

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# TARGET AUDIENCE

- HIGH VALUE TRAVELERS



## Affluent Millennials

- Avid Leisure

- Experienced, highly educated, well-traveled
- High propensity for Experiences
- Highly engaged with social media



## Families

- Reunion & Educational

- Parent-child bonding
- Cultural learning
- Filial piety by children



## Romance Seekers

- Include LGBTQ

- Getaways for urbanites
- Overseas weddings, honeymoons & babymoons
- LGBTQ community

# CONSUMER STRATEGY

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# Hawai'i ~ Sanctuary of Aloha

《回歸初心 探索永續夏威夷》

# MAJOR CAMPAIGNS

## 《回歸初心 探索永續夏威夷》



Malama  
**'āina**



Aloha Family  
Picnic Festival



Lei for Love



Cuisine of  
Aloha

# MALAMA 'ĀINA

**Target Audience:** HVT – Millennials (Avid Travelers)  
**Marketing Mix:** KOL Fam, Social Video, Advertising, PR, Trade

Digital Marketing



Year Round Social Media & PR



Potential Partners



# ALOHA FAMILY PICNIC FESTIVAL

**Target Audience:** Families  
**Marketing Mix:** Outdoor, PR, TV ADs,  
Social Content, KOL, Mini Trade Fair



Digital Marketing

## Potential Partners



PACIFIC ISLANDS INSTITUTE



夏威夷火山之花舞蹈學院



## Year Round Social Media & PR



HAWAII TOURISM  
TAIWAN

# LEI FOR LOVE

**Target Audience:** Couples & LGBTQ

**Marketing Mix:** Floral Theme Itineraries, YouTube, Brand Alliance, Social Media, Trade

**Digital Marketing**  YouTube



Year Round Social Media & PR



**Potential Partners**



# CUISINE OF ALOHA

Target Audience: HVT - Millennials

Marketing Mix: Social Media, Online TV Channel, Celebrity Chefs, Food Trucks, Travel Fair

Digital Marketing



Year Round Social Media & PR



Potential Partners





# TRADE STRATEGY

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# TAIWAN ALOHA MISSION

## Objective:

- Secure leads for leisure & MCI business
- Educate partners on island dispersal
- Support partners in product development

## Description:

- Leisure & MCI business
- Face-to-face business appointments
- Leisure trade, MCI Intermediaries, Incentive Planners, Corporates

## Potential Partners:



## Taiwan's Signature B2B Event

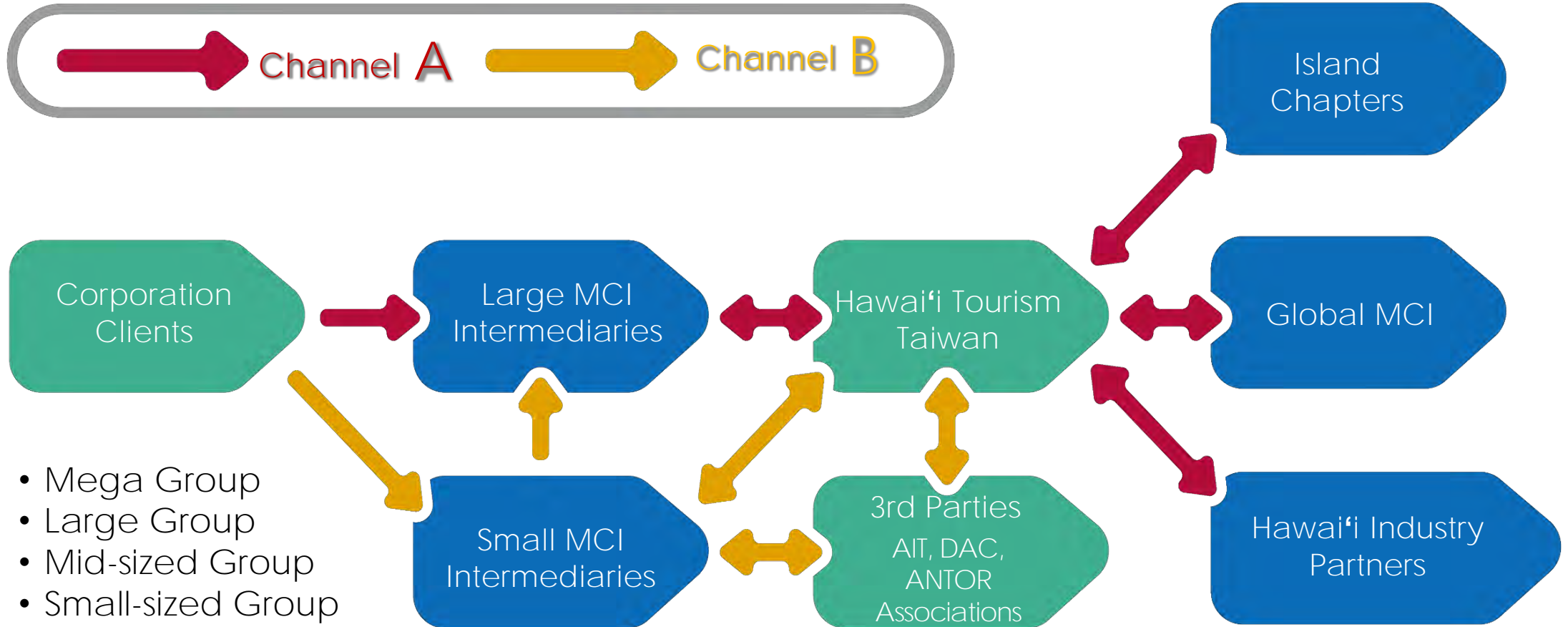


MCI

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HAWAII TOURISM™  
TAIWAN

# LEAD DEVELOPMENT



# TARGET CORPORATIONS



南山人壽



AVON



中華民國展覽暨會議商業同業公會  
Taiwan Exhibition & Convention Association



中華民國多層次傳銷商業同業公會  
Taiwan Association of Multilevel Marketing, R.O.C



國際引藻生物科技  
International Cryptomonadates Biotechnology



中華民國醫事放射學會  
Taiwan Society of Radiological Technologists (TWSRT)



# RESPONSIBLE TOURISM

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# RESPONSIBLE TOURISM

Year Round Social Media & PR

## MALAMA 'ĀINA



ELLE

VOGUE



# HAWAII ~ SANCTUARY OF ALOHA

Community



Hawaiian Culture



Marketing



Natural Resources







# 2020 BMP - CHINA

Dennis Suo, CEO  
Alexander Wong, COO



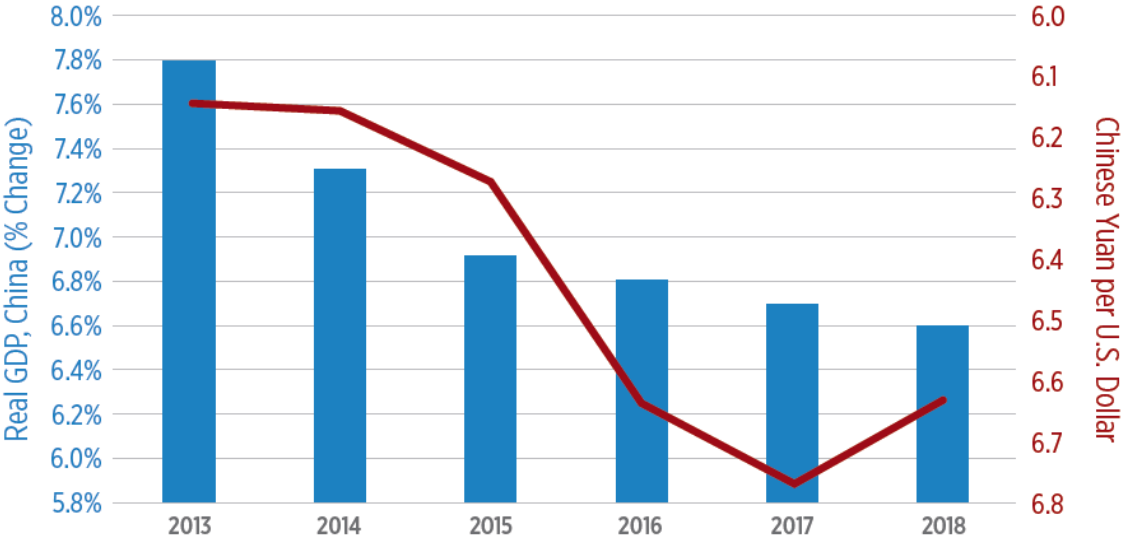
# MARKET CONDITIONS

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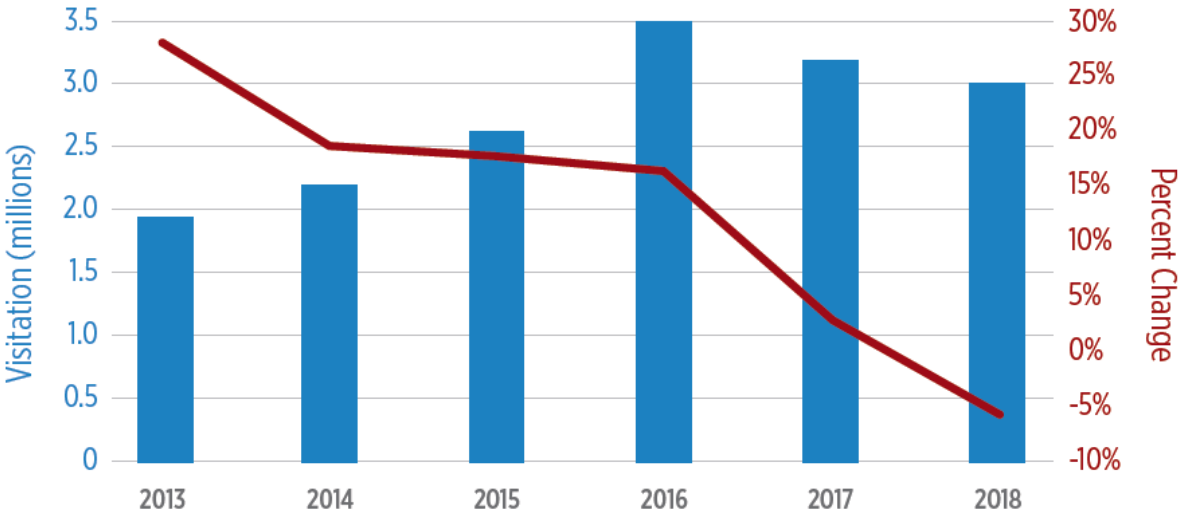
# MARKET CONDITIONS

### Chinese GDP and Currency, 2013-2018



Source: Oxford Economics

### Annual Chinese Visitation to the U.S., 2013-2018



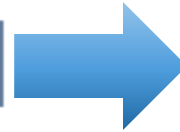
Source: U.S. Department of Commerce



# MARKET CONDITIONS

## TOP CHINESE LONG-HAUL DESTINATIONS AND SHARE OF LONG-HAUL TRAVEL FROM CHINA, 2015 AND 2018

DESTINATION	SHARE OF LONG-HAUL TRAVEL, 2015	SHARE OF LONG-HAUL TRAVEL, 2018	VISITATIONS, 2018 (IN MILLIONS)
1 United States	15.3%	12.9% ▼	3.0
2 France	12.8%	9.1% ▼	2.1
3 Russia	6.7%	9.0% ▲	2.1
4 Germany	8.1%	6.9% ▼	1.6
5 Australia	6.0%	6.2% ▲	1.4
<b>Total Long-Haul Travel</b>		<b>100%</b>	<b>23.1</b>



## CHINA MARKET SUMMARY, 2018

U.S. Visitations from China	3 million
Travel Spending	\$18.3 billion
Average Spending Per Visitor	\$6,950
Total U.S. Travel Exports	\$34.5 billion
U.S. Travel Trade Balance	\$29 billion

VWP Member	Free Trade Agreement	Global Entry	Preclearance	Open Skies
X	X	X	X	X

Source: Tourism Economics and U.S. Department of Commerce (for U.S. arrivals)

# MARKET CONDITIONS



International Trade Administration  
Industry and Analysis  
National Travel and Tourism Office

FAST FACTS:  
UNITED STATES TRAVEL AND  
TOURISM INDUSTRY  
—2018—

## International Visitors to the U.S. (2018)

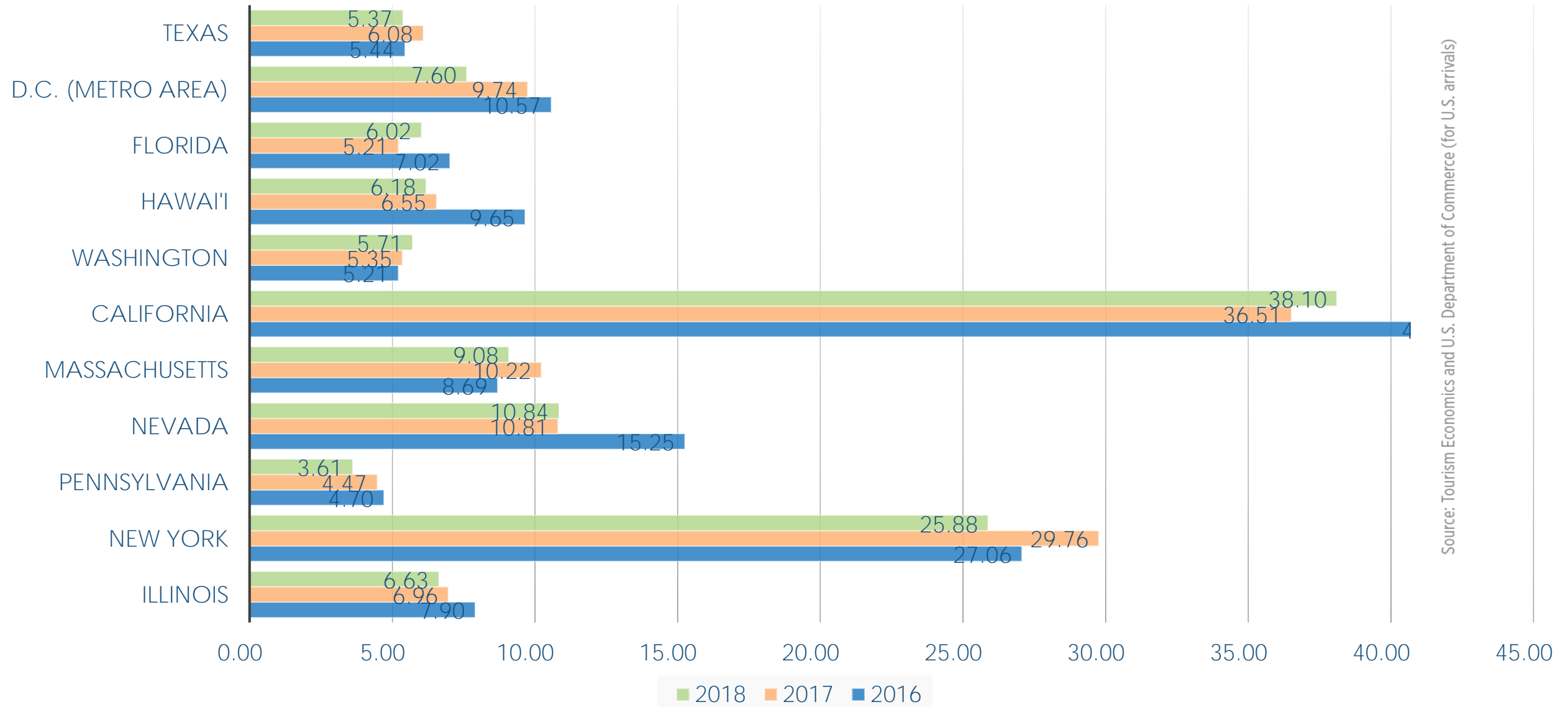
<b>Total:</b>	<b>79.6 million</b>		
1 Canada	21.2 million	6 S. Korea	2.2 million
2 Mexico	18.5 million	7 Brazil	2.2 million
3 U.K.	4.7 million	8 Germany	2.1 million
4 Japan	3.5 million	9 France	1.8 million
<b>-6%</b> 5 China	3.0 million	10 India	1.4 million

## 2018 U.S. Travel Exports *(for all purposes including education)*

<b>Total:</b>	<b>\$256.1 billion</b>		
<b>+3%</b> 1 China	\$34.6 billion	6 India	\$15.8 billion
2 Canada	\$22.2 billion	7 Brazil	\$12.3 billion
3 Mexico	\$20.9 billion	8 S. Korea	\$9.5 billion
4 Japan	\$16.3 billion	9 Australia	\$8.6 billion
5 U.K.	\$16.2 billion	10 Germany	\$8.3 billion

# MARKET CONDITIONS

Visitation to U.S. Destinations % of Inbound





# CONSUMER TRENDS

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# CONSUMER TRENDS

Industry players should rethink their assumptions about Chinese outbound tourists

What they like to do

Myth

Reality

1



Shop! Shop! Shop!

Experience matters more

2



Exclusively visit iconic landmarks

Diverse travel needs

How to accommodate them

3



Short length of stay

Longer length of stay

4



As travel gain experience, decline  
In package tours

Air + hotel package on the rise and  
activities booking in destination

5



Only have taste for Chinese cuisine

Fine dining highly valued

6



Cash/Union Pay transaction only

Alipay/WeChat is a must

How to attract them

7



Rely on traditional travel agencies

Friends/family and social media  
play pivotal role, digitally savvy

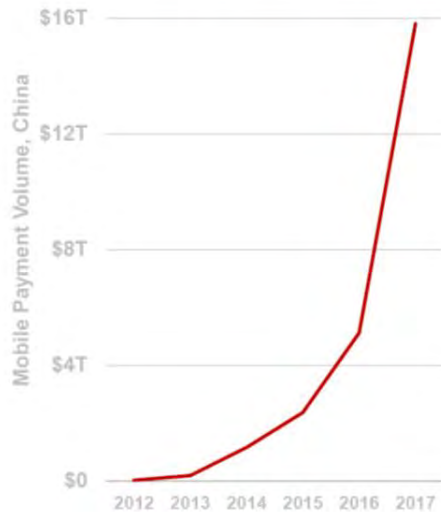


# CONSUMER TRENDS

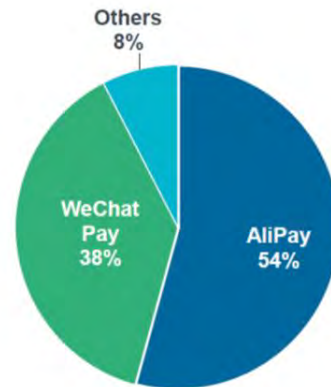
China Mobile Payment Volume = +209% vs. +116% Y/Y Led by Alipay + WeChat Pay

China Mobile Internet Usage (Data) = Continues to Accelerate +189% vs. +162% Y/Y

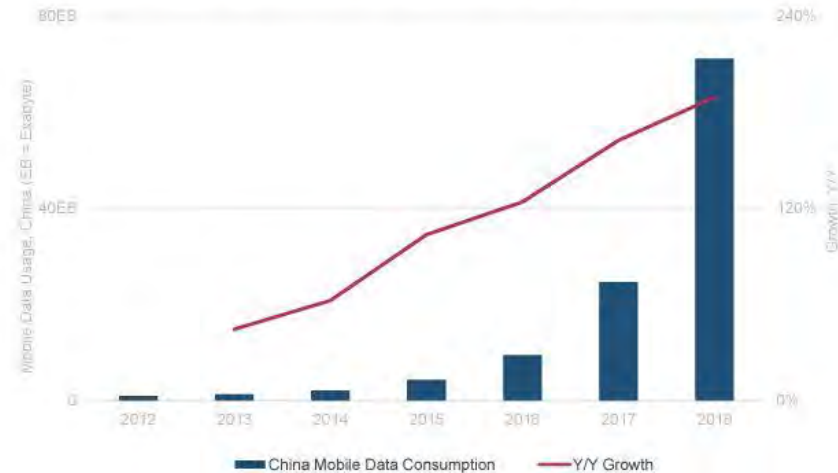
China Mobile Payment Volume



China Mobile Payment Share\*



China Cellular Internet Data Usage & Growth Y/Y





# TARGET AUDIENCE

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# TARGET AUDIENCE

MILLENNIUM INDIVIDUALIST (MI)

FAMILY TRAVELERS

AFFLUENT BESPOKE PACKAGE (ELITE)

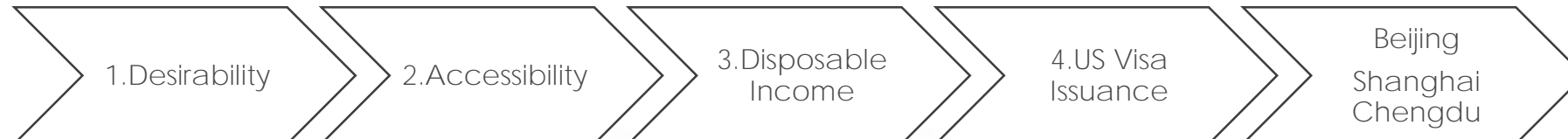
夏威夷超酷超美跳伞攻略  
旅行必体验的项目 夏威夷跳伞攻略来啦  
小伙伴们去夏威夷玩耍，那一定要去跳一次伞，不仅是因为夏威夷海岛的风景真的太美，也是因为夏威夷跳伞是全球！最！低！价！敲黑板，真的比其他任何一个地方都要便宜，真的不要太大算！  
被马克吐温称为“大洋中最美的岛屿”的夏威夷，是旅游的天堂，夏威夷跳伞被称为世界最美的跳伞之一，特别是夏威夷欧胡岛的Drop Zone更是被誉为World most beautiful DZ（世界上最美的空天地）。  
夏威夷跳伞目前只能在欧胡岛，（也就是夏威夷的首府檀香山）欧胡岛的跳伞公司目前有两家，分别是 SKYDIVE HAWAII和PACIFIC SKYDIVING，其中Pacific skydiving有21000英尺的高空跳伞，这是不带伞可以允许的最高跳伞高度。

少女心之感的夏威夷粉色酒店推荐 皇家夏威夷酒店  
“The pink palace of the Pacific”  
这个酒店真的到处都是粉红色，很多ins博主都来打卡过，普通房型都是圆景，粉色背景墙，房间设施有些老旧，但是有90多年历史的酒店了。强烈推荐塔楼套房，阳台景色真的太美了。携程价格3500左右，酒店每天还有30美金左右的resort fee。

夏威夷 say "Yes, I do" in Hawai'i  
很多情侣选择来夏威夷度蜜月，抽出一两天的时间拍摄婚纱照。  
图中的YES IDO车牌是夏威夷注册有效的汽车牌照！  
我的婚纱好看吗  
08-18  
谁说点什么，让TA也认识看笔记的。  
去年感恩节在夏威夷过的，老大就念着想回来夏威夷，索性就决定圣诞节来夏威夷过了，我一个人带两个，老大女儿6岁，老二儿子22个月，可想有多难搞了吗.....  
因为是带孩子出来旅游，所以主题主要以孩子为准，我们在8天在夏威夷，我定了4天在迪士尼主题酒店，后四天在

夏威夷 购物 爱马仕菜篮子18奶昔白金扣 降价的北克雅宝  
夏威夷逛什么  
Honolulu有两个大型购物地，Waikiki和Ala Moana  
我住在Waikiki的Royal Hawaiian真的是宇宙中心！楼下就是Royal Hawaiian center，各种名牌店！

夏威夷欧胡岛保姆级攻略 第一次去夏威夷怎么玩  
欧胡岛是夏威夷所有岛屿中最繁华最有青春气息的一个，也是夏威夷也是从中国来夏威夷的必到之地，第一次来夏威夷的盆友一定要收好这篇。  
玩  
夏威夷海滩



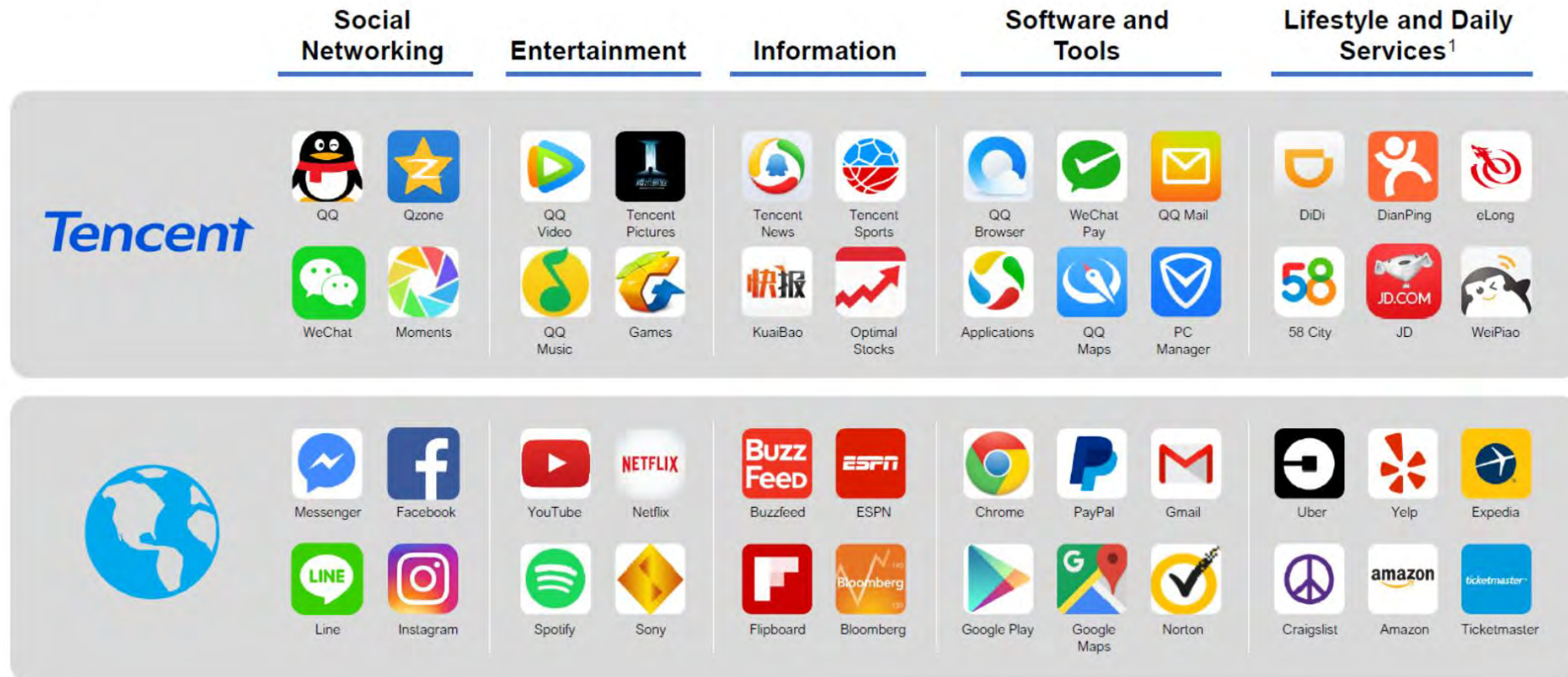


# INTEGRATED DIGITAL MARKETING (IDM) STRATEGY

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# IDM STRATEGY

Built on connecting – Tencent's ecosystem is integral into everyday life in China



# IDM STRATEGY



## Why WeChat?



1.1B

Monthly active users  
Weixin + WeChat

90 mins

50% of users use  
WeChat for at least 90  
mins a day

65%

% of All Monthly Active  
Users born in 80s or 90s

>1M

Total Mini Programs on  
the WeChat Official  
Account Platform

WeChat Penetration in China Tier 1-5 Cities

Tier 1

93%

Tier 2

69%

Tier 3

43%

Tier 4

27%

Tier 5

28%

# IDM STRATEGY

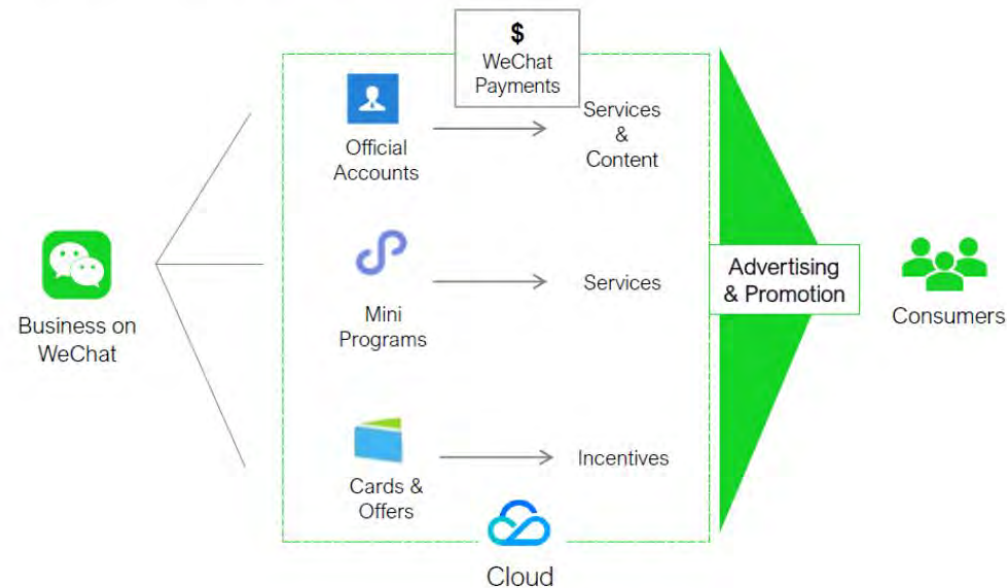


Brands benefit from WeChat's robust ecosystem and open platform



Business Official Account Example

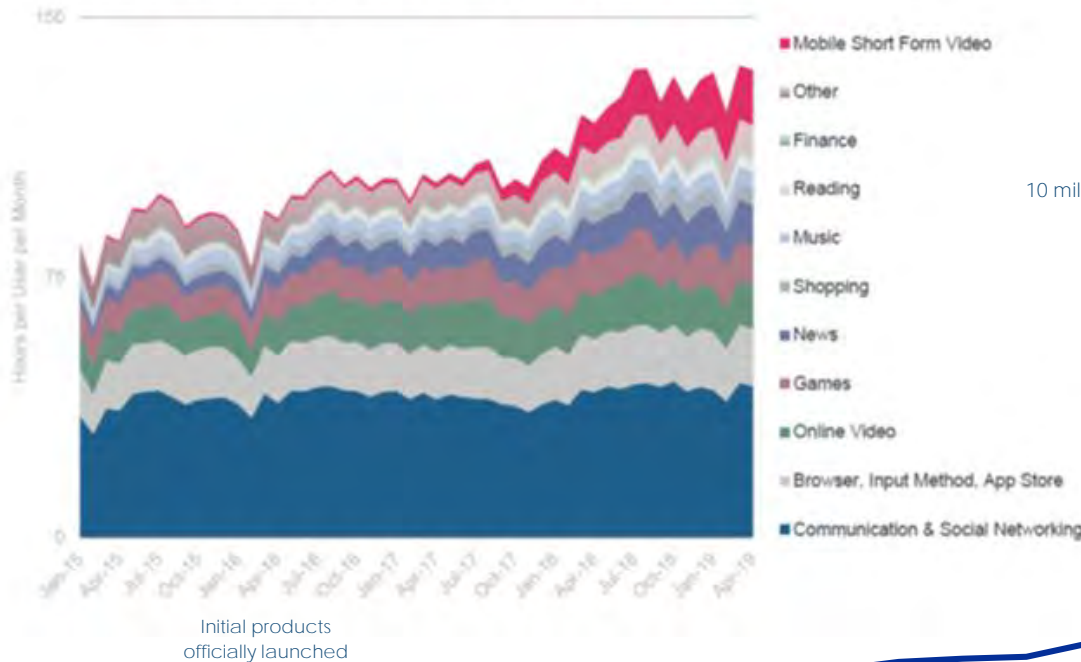
Businesses can establish an Official Account to connect with consumers through WeChat's natural and intimate chatting interface.



# IDM STRATEGY

## Mainstream Front of Social Short Video Marketing

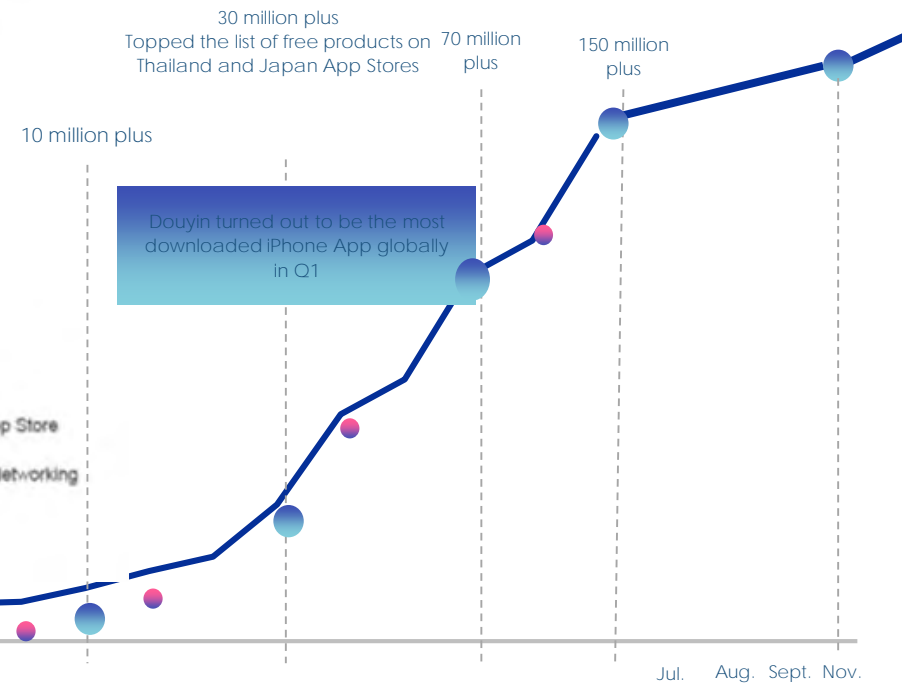
### Average Smartphone Time Spent per MAU per Month



MAU: 450 million

DAU: 200 million

Daily video views: 20 billion



2016

2017

2018

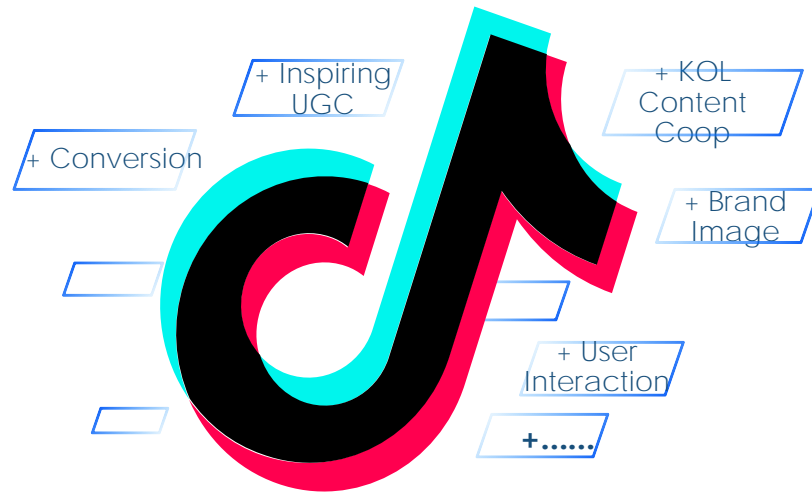
Data source: Sensor Tower; TikTok platform



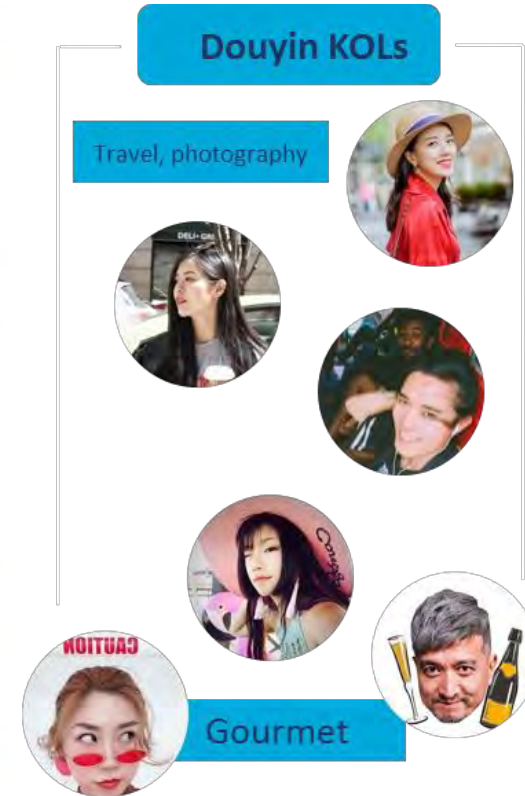


# IDM STRATEGY

First step in short video marketing:  
Set up official Duoyin account for Hawai'i



Official Account Page Demo





# Xiaohongshu

Young people's lifestyle platform and consumption decision guide

In Xiaohongshu, users post little moments of their lives through short video, graphic and other forms. As of March 2019, Xiaohongshu had more than 220 million users which continued to grow rapidly, 70% of whom were born in the 1990s.

# IDM STRATEGY

小红书

## Xiaohongshu

Youth's lifestyle platform and consumption guide  
KOLs in-depth content coop, enforcing endorsement, and inspiring organic travel UGC

KOLs

Travel

Photography

Gourmet

1 Destination  
"Checking-In"  
Point by KOL



打卡 La La Land 取景地 格里菲斯天文台  
作为《爱乐之城》的影迷  
一直很想来看看男女主角第一次约会的场景  
这次特意从Laguna Beach坐了一个半小时的车来到  
这里打卡啦！  
说点什么... 660 115 49

2 Destination  
Travel Tips



【奥克兰】必玩行程分享~第一次空中漫步(恐高)  
【天空塔 @ Sky Tower】  
奥克兰市中心的标志性建筑自然是Sky  
说点什么... 103 78 32

3 Gourmet  
Recommendation



【日本】全世界最好吃的终极乌冬在高松！  
四国香川县是@日本 乌冬面的发源地，很多人到此就为了吃一碗乌冬面，说他是全世界最好吃的乌冬一点也不为过！我这次和@玛小粒Marley 来  
说点什么... 231 142 30

4 Ultimate  
Landscape  
Photography



裸眼看银河、流星“大雨”这种什么样的感受！  
距离在夏威夷的这次体验已经过去了2个月，一直迟迟忘记和大家分享  
由于之前去天文台被封路没能看到银河，不甘心的我们一直做调查  
说点什么... 1136 1806 125



# Mafengwo Travel

## China's Leading Travel UGC Platform

UGC jointly created by hundreds of millions of FIT travelers, which has more than 60,000 global travel destinations, 600,000 new travel guides and itinerary recommendations, 760 million travel-guide downloads, and is considered as "China's travel bible".

ふみきり

# IDM STRATEGY



## Mafengwo

China's Leading Travel UGC Platform  
KOLs Travel Content Cooperation

KOLs Content  
Forms

**1** Travel VLOG  
Vlogs for scenery, gourmet and local culture.

**2** Travelogue  
In-depth personal travel notes to evaluate the scenic spots, natural landscape, hotels, food, attractions, shopping etc.

**3** Travel Guide  
Travel guides and tips respectively for MI, Family and Elite travelers based on the preferences.

1



2



3



The campaign concept is to move away from stereotyped beach resort sceneries to offer an authentic local Hawaiian experience and let the travelers to define the uniqueness of Hawaiian Islands.

# 拥抱一切想象

EMBRACE ALL IMAGINATION

*The*  
**HAWAIIAN**  
ISLANDS

A woman in traditional Hawaiian attire is the central focus. She wears a large, lush lei made of green leaves and white flowers around her head and neck. Her arms are adorned with multiple bracelets made of dark grapes. She is looking down and to the right with a serene expression. The background is dark and out of focus, suggesting an outdoor night setting.

*The*  
**HAWAIIAN.**  
ISLANDS

# 拥抱 一切 想象

*EMBRACE ALL  
IMAGINATION*

To drive demand by improving brand awareness of the Hawaiian Islands. To showcase the culture of Hawai'i, history and people along with our natural beauty.

A close-up photograph of a traditional Hawaiian lei. The lei is composed of several layers of flowers. The top layer features bright orange and yellow-orange flowers with dark centers. Below this is a layer of smaller, delicate white flowers. The background is filled with more orange and red flowers, creating a rich, warm color palette. The lighting is soft, highlighting the textures of the petals.

# 拥抱一切想象

EMBRACE ALL IMAGINATION

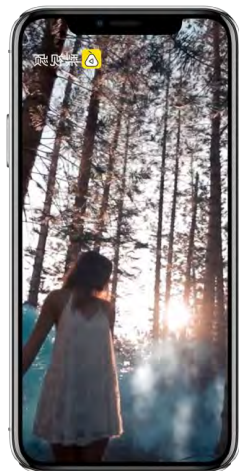
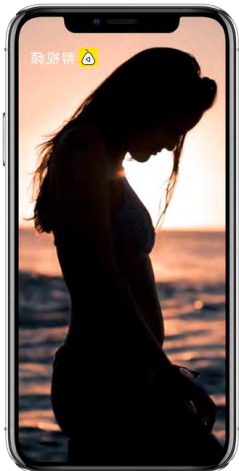
*The*  
**HAWAIIAN**  
ISLANDS

To avoid formulating a “one size fits all” journey for all Hawaiian Islands. The consumption needs of Chinese tourists are constantly fluid and evolving.



# CAMPAIGN DEMO

梨视频X抖音  
 #夏威夷年轻力Vlog周刊#  
 Pear Video X Douyin (TikTok)  
 #Hawai'i youth force vlog  
 weekly# - MI Market



限时挑战 10天穿越夏威夷  
 Time-limited challenge  
 10 days to travel in  
 Hawai'i - MI Market

'Ohana foodie travel  
 guide campaign  
 #带全家吃遍夏威夷  
 Eat like a local#  
 - Family Market



Nov 2019

# CAMPAIGN DEMO

Partnership with luxury travel platform Ctrip HH Travel #TOP 10 ultimate journeys in Hawai'i#



The image shows a screenshot of a website banner for a Hawaii luxury travel campaign. The banner features a photograph of four people (two men and two women) standing on a sandy beach, looking out at the ocean waves. The text is overlaid on the right side of the image.

HHtravel  
携程旅游

热门目的地 酒店精选 酒店暗访 关于我们

## 私人订制——专属你的夏威夷奢适之旅

#夏威夷TOP10极致旅游#

- ✓ 优先领略 哈雷阿卡拉的日出
- ✓ 在直升机上俯瞰壮阔瀑布和火山
- ✓ 依你的味蕾定制专属料理

HAWAII TOURISM  
CHINA



# B2C2B STRATEGY

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# B2C2B STRATEGY



# TRADE MISSION 2020

**WE CONNECT  
THE WORLD OF TRAVEL**

13 - 15 May 2020 · Shanghai · itb-china.com

### FOUNDING PARTNERS



### MICE & CORPORATE TRAVEL PARTNERS



### CUSTOMIZED & THEMED TRAVEL PARTNERS



### GROUP BUYER PARTNERS



## BUYERS PROGRAM 2020

### MATCHMAKING

**21,000+**

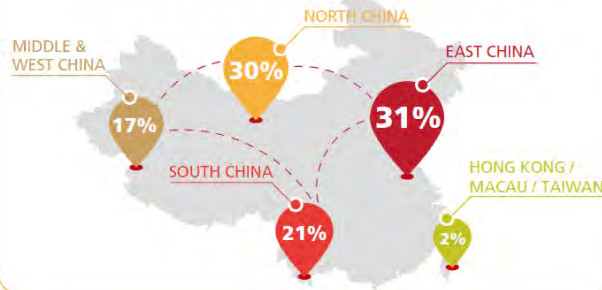
Match Made & Prescheduled Appointments Maximize Business Opportunities

### BUYERS' ORIGIN

**850**

Chinese Buyers

#### CHINESE BUYERS GEOGRAPHIC BREAKDOWN



**ITB  
CHINA**

### DIVERSITY

**600+**

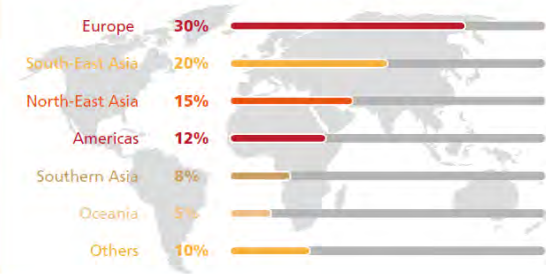
Leading Chinese and International Travel Agencies Participating In The Buyers Program Compared With 2018, New Buyer Companies Account For Over 60%

### BUYERS' ORIGIN

**200**

International Buyers

#### INTERNATIONAL BUYERS GEOGRAPHIC BREAKDOWN



**HAWAII TOURISM**  
CHINA

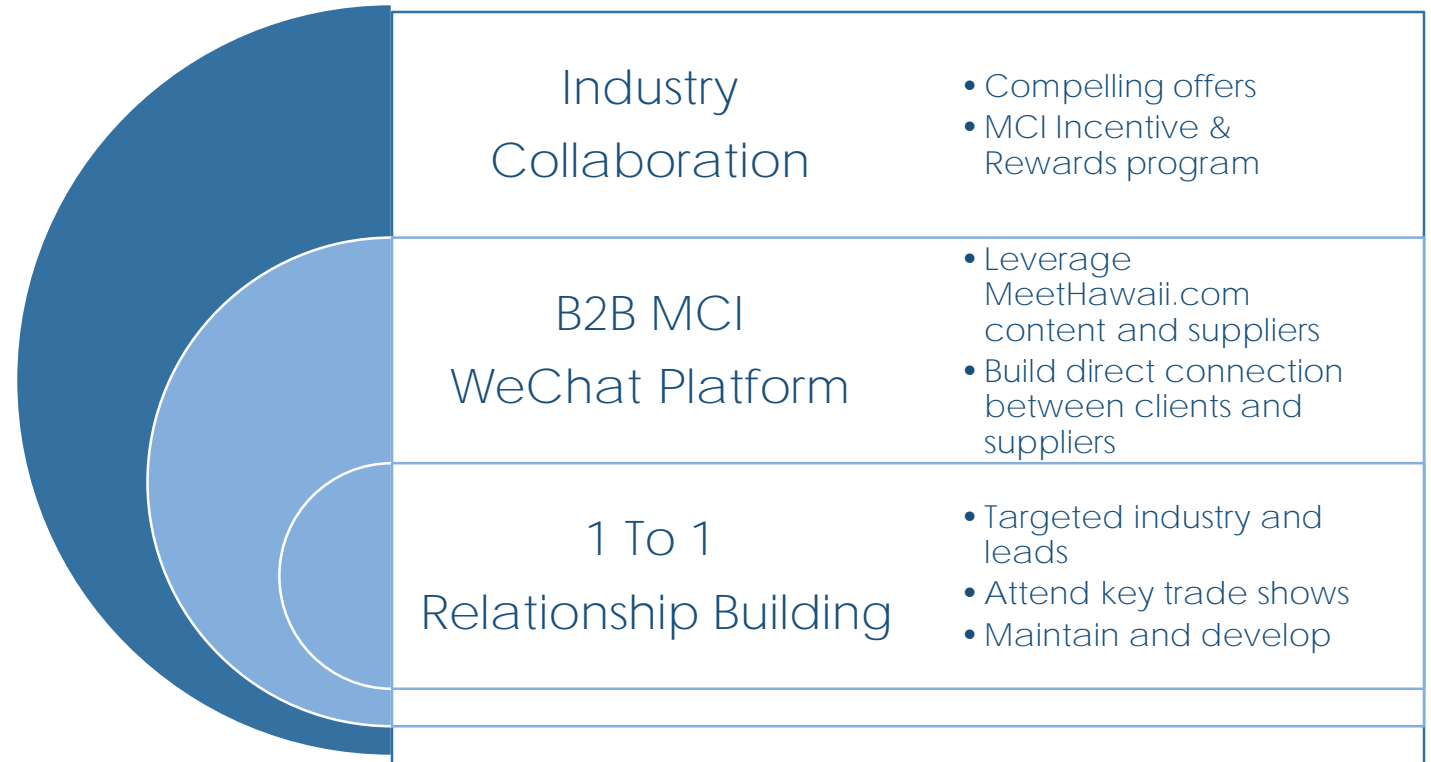
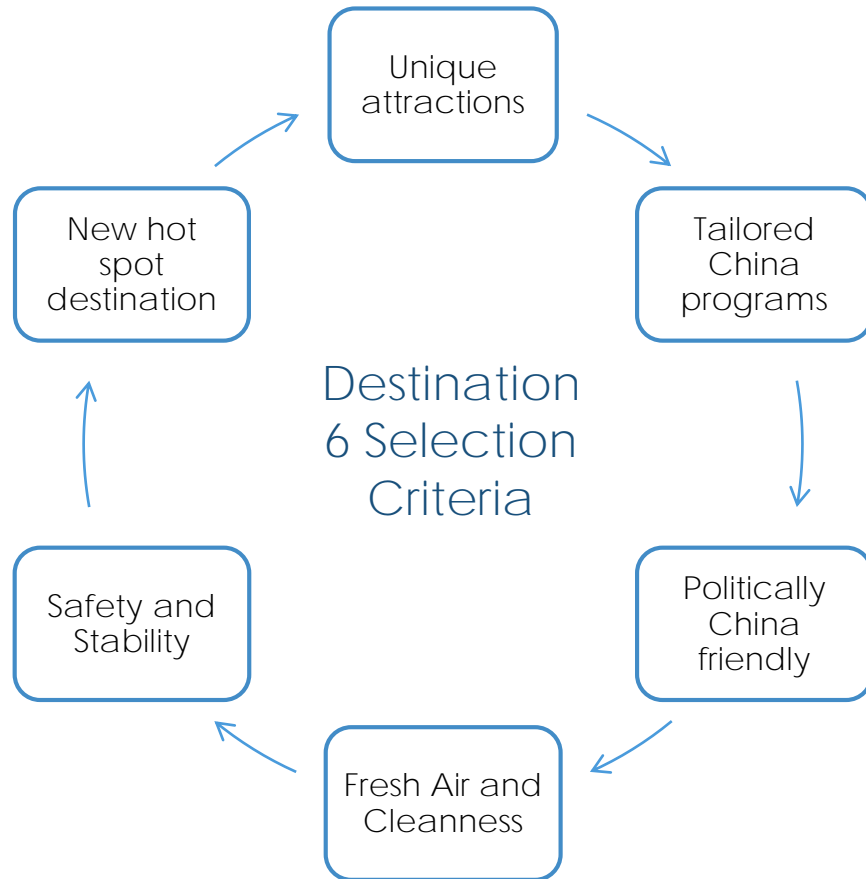


MCI

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HAWAII TOURISM™  
CHINA

# MCI



# MCI

## MCI Destination Package Program



1	Accessibility and Ground Transportation Solution
2	Accommodation and Meeting Facilities
3	Themed Dinner / Gala Dinner / Awards Night
4	Team Building Activities
5	Hawaiian Cultural Event / Performance / Local Immersion
6	Sightseeing of Local Icons and Scenery
7	Mix of Both Chinese and Local Cuisines
8	Chinese Language Tour Guides and Service Support
9	Shopping Facility and Exclusive Offers
10	Relate to Corporate Culture / Objectives
11	Corporate Social Responsibility (CSR) Activities
12	Iconic Location for Group Photo





# RESPONSIBLE TOURISM

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# RESPONSIBLE TOURISM



- COMMUNICATE ROOTED, KULEANA and TRAVEL TIPs messaging creatively and respectfully into our digital and social media campaigns and platforms from KOLs to Short Videos.
- LEAD a focus group consortium involving industry stakeholders to ensure consistency of messages to all Chinese visitor groups.
- INCORPORATE HTA's Hawaiian cultural initiatives, Hawaiian values and traditions into the strategic and creative processes.
- ALIGN WITH HTA's 4 Pillars in B2C2B marketing strategy as branding differentiator in the world's most competitive Chinese outbound market to build a long-term ROI.



# 2020 BMP - KOREA

**Liz You**

Director **of Marketing and PR**



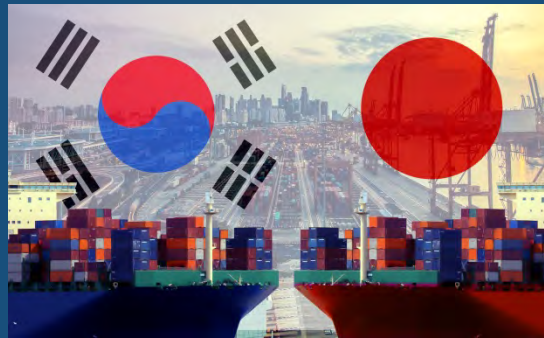
# MARKET CONDITIONS

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# MARKET CONDITIONS



Chill in  
inter-Korean  
relations



Trade War  
between South  
Korea and  
Japan



1.8% Korean  
GDP growth  
in 2019

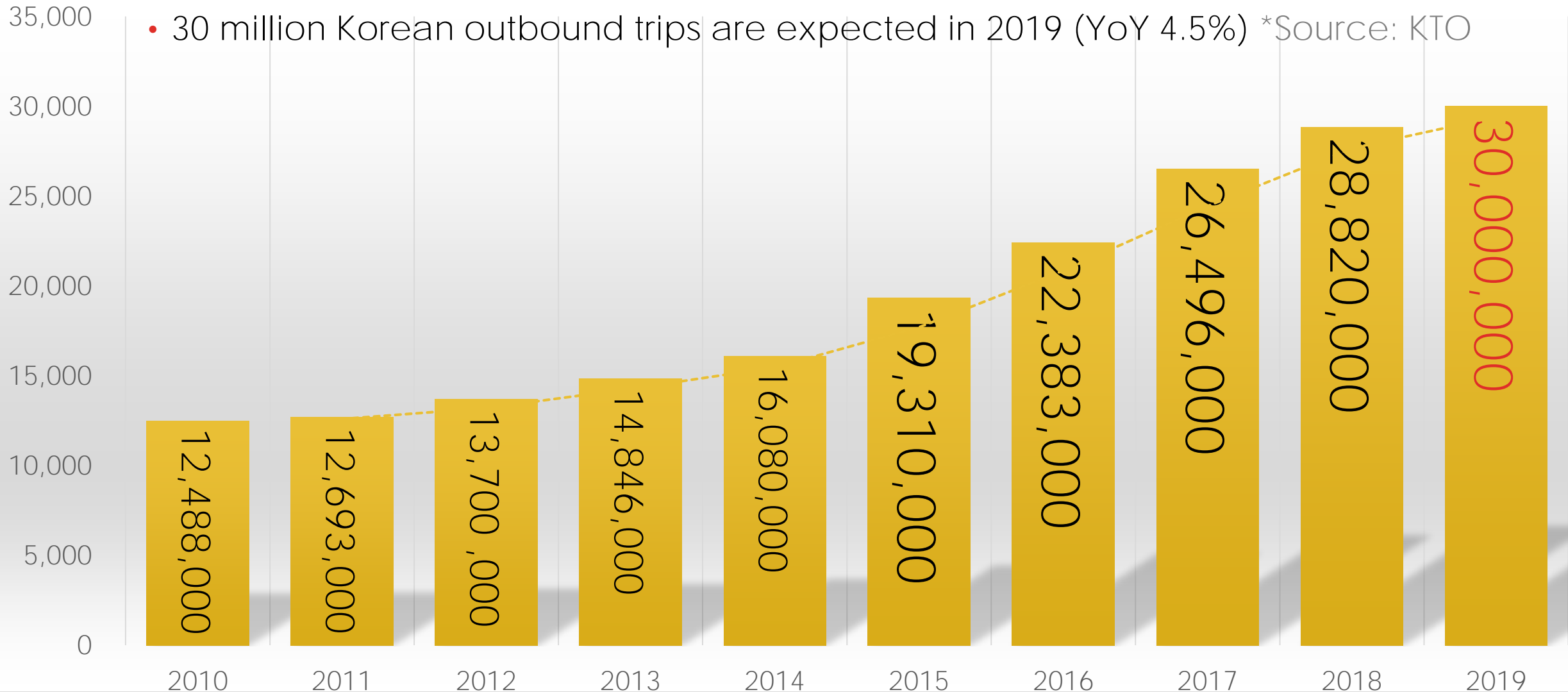


Fluctuating  
FX rate

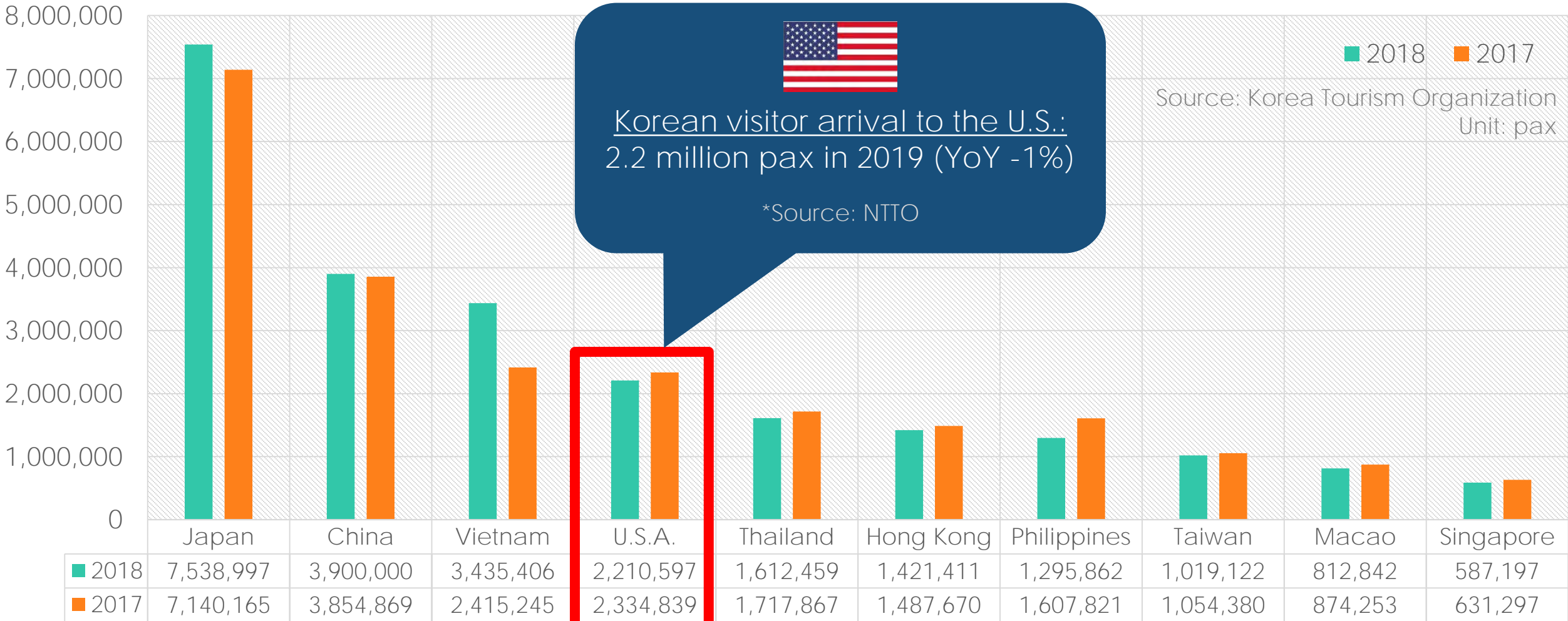
1\$ = 1,168.46 KRW  
(as of Oct 2019)

# KOREA OUTBOUND TRAVEL

• 30 million Korean outbound trips are expected in 2019 (YoY 4.5%) \*Source: KTO



# KOREA OUTBOUND TRIPS



# AIR SYNOPSIS



**KOREAN AIR**  
(KE001/KE051/KE053)



**ASIANA AIRLINES**  
(OZ232)



**HAWAIIAN AIRLINES.**  
(HA460)



**JINAIR**  
(LJ 601)

## Frequency

**Two dailies & 4 times weekly**

**Daily**

**5 times weekly**

**5 times weekly**  
(\*Temporary suspension; March – Jul / Sep - Dec)

## Seats (Aircraft)

**276** seats (A330)  
**219** seats (A332)  
**368** seats (B747)

**275** seats (A330)

**277** seats (A330)

**393** seats (B772)

## Newest Updates

- Delta increased its stake to 9.21% in Korean Air's parent company Hanjin KAL
- Hyundai Development Co (HDC) - Mirae Asset consortium, wins bid for Asiana Airlines



# TRAVEL TRENDS

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# TRAVEL TRENDS



**Sustainability**

---



**Transformational  
Travel**

---



**Expanding  
OTAs**

---

# TARGET AUDIENCE

---

# KOREA'S KEY TARGET SEGMENT



## Millennial-minded Travelers

#Independent  
#Experiences  
#Followers of individual themes



## Aspirers

#Materialistic  
#Acquisitive  
#Affiliative



## Explorers

#Challenge  
#Adventurers  
keen to try new activities and experiences



## Mainstreamers

#Conventional  
#Favoring well-known brands  
#Family travelers



## First-time Visitors

#Travelers who haven't visited Hawai'i yet

# KEY STRATEGIES

1



**Drive destination brand awareness**

2



**Drive high-value visitation**

3



**Maintain high-value air services to Hawai'i**

4



**Maintain the cultural integrity of Hawai'i**

5



**Collaborate with Hawai'i's visitor industry**

6



**Promote Hawai'i as MCI destination**

# CONSUMER STRATEGY

---

- New Hawai'i branding campaign
- Aloha media university
- #Stories of aloha
- Sense of Hawai'i
  - Sounds of Hawai'i
  - Arts of Hawai'i
  - Taste of Hawai'i

# Fly to Hawai'i Get inspired



Hawai'i Brand Position in Korea

# MEDIA REVERSE MISSION

# ALOHA MEDIA UNIVERSITY



Inaugural Hawai'i media reverse mission



Educational opportunity to showcase **Hawai'i's authentic culture**



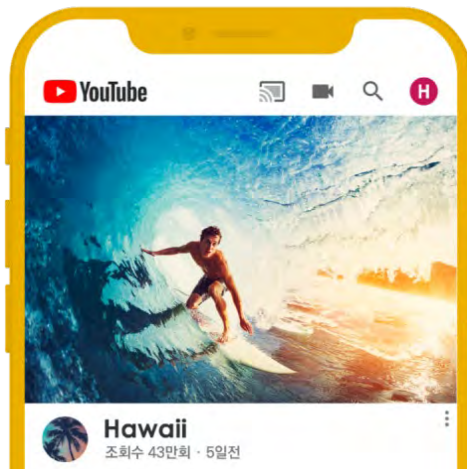
**Media marketplace and FAM**





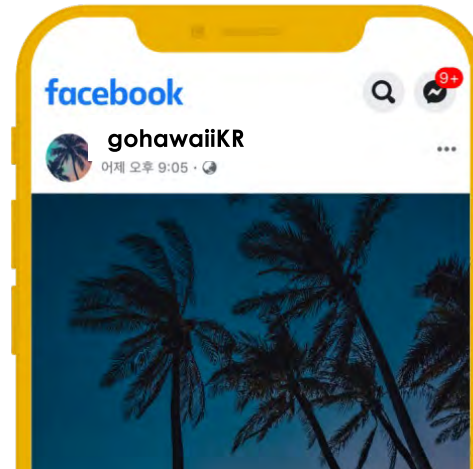
# #STORIES OF ALOHA

- Social media management program
- YouTube Aloha TV – HTK's newest communication channel
- Up-to-date management of Facebook
- Develop contents via collaboration with micro-influencers



 YouTube

1.5K Followers



 facebook

22K Followers

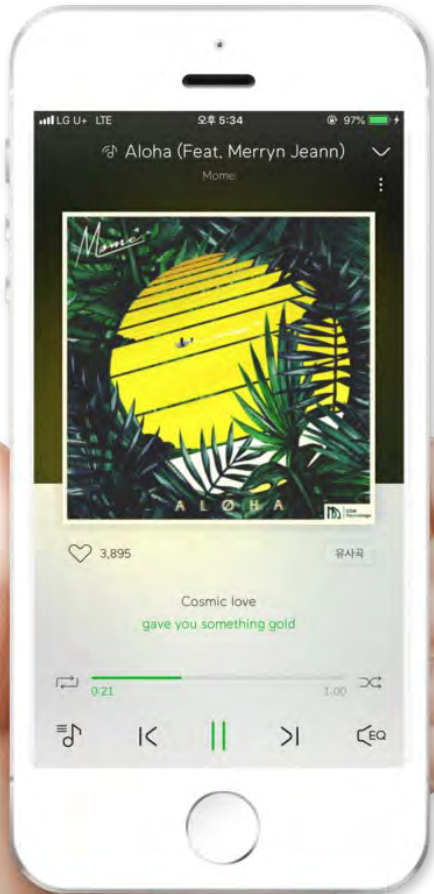


 Instagram

20K Followers

# SOUNDS OF HAWAI'I IN PARTNERSHIP WITH MELON

NEW



## Melón



Launch a consumer promotion with Melon





Over **28 million** subscribers



Appoint **'Aloha DJ'** to create a new playlist of **Hawaiian songs**

# ARTS OF HAWAI'I IN PARTNERSHIP WITH ARTISTS

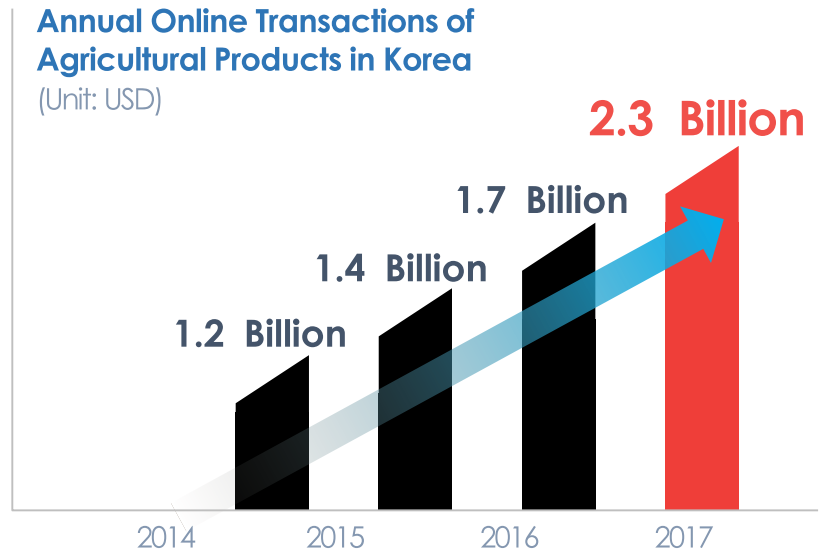
-  Leverage art of Hawai'i for destination exposures
-  Collaborate with artists based in Hawai'i to organize art exhibition to promote destination along with its deep culture
-  Total volume of Korean art business in 2017 has been increased 25% to about US\$ 492 million, compared to the previous year



# TASTE OF HAWAI'I IN PARTNERSHIP WITH SSG



- Refresh image of Hawai'i as a culinary destination full of sustainable food
- Collaborate with SSG, the largest retailer in Korea owned by Samsung
- 'Tasty Hawai'i Market'



# TRADE STRATEGY

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- Airline co-op programs
- Meet your #OhanaMoment
- 1 week on each Island (1OI)

# AIRLINE CO-OP PROGRAMS

**KOREAN AIR**

---

Aloha priority  
campaign

for new-lux Hawai'i  
product



**ASIANA AIRLINES**

---

Hawai'i OTA  
campaign

for special- themed FIT  
products



**HAWAIIAN  
AIRLINES.**

---



Hawai'i  
heritage  
promotion

for sustainability/  
neighbor islands  
initiatives



**JINAIR**

---

Aloha  
millennial  
promotion

for FIT branding  
campaign



# MEET YOUR #OHANAMOMENT



## Market Background

Korea's No.1 wholesaler Hana Tour showed 91% YOY growth in 3 generation trips



## Objectives

Position Hawai'i as ultimate generation-by-generation family trip destination



**'Aloha 3 Generation' package products development**



**Additional edu-tour themed #OhanaMoment product**



**Sales/online advertising promotions**

# 1 WEEK ON EACH ISLAND (1OI)



## Market background

Korean visitors' length of stay: 7.72 days (YTD September 2019), up 3.8% (Source: DBEDT)



## Objectives

Bolster **extended stays and high spending** on the Hawaiian Islands



- **Core target media FAM**



- **#Hawai'i 1OI influencer FAM**



- **Longer stay-themed FAM & follow-up promotion**



# MCI

- MCI market background
- Lead development from key corporate-target events
- Golf promotion and initiatives

HAWAII TOURISM  
KOREA

# MCI MARKET BACKGROUND



Increasing demand  
on **long-haul destinations**



**Shorter length of stay**  
(4 to 5 nights  
in Hawai'i)



**Key vertical segment:**  
finance/banking,  
insurance, multi-level  
marketing (MLM)



**Emerging segment:**  
technology &  
entertainment  
sector



**Avoid leisure  
peak season**



**Growing  
B+leisure market**



**National  
general election  
in Apr 2020**

# LEAD DEVELOPMENT FROM KEY CORPORATE-TARGET EVENTS



Meet Hawai'i  
corporate weekend



Meet Hawai'i  
corporate VIP reception



# GOLF INITIATIVES



Pitch Hawai'i as a year-round premium golf destination



Develop large-scale co-promotion in concert with major golf tournaments in Hawai'i – Sony Open Golf Tournament and Lotte LPGA Golf Championship



Develop new Hawai'i golf tour products and execute online/offline promotions

# RESPONSIBLE TOURISM

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- Pre/post arrival campaign
- Go green with aloha

# ARRIVAL CAMPAIGN



Kuleana means **responsibility** and **it's the personal and collective commitment to the people of Hawai'i and the place.**



- ✓ Volunteer opportunities in Hawai'i
- ✓ Collaboration with local partner for native Hawaiian culture
- ✓ In-flight video and hotel confirmation email
- ✓ Educational seminars

# GO GREEN WITH ALOHA

- Promote the Hawaiian Islands as a sustainable and eco-friendly destination
- Elevate Hawai'i as a global center and brand for sustainability



**PR**

- **Celebrity endorsement in line with Honolulu Marathon**



**Digital**

- **Joint social media campaign with consumer brands**



**Marketing**

- **Partner with Hawai'i Green Growth on Aloha+ Challenge**
- **Sustainable coastlines Hawai'i**

# KEY STRATEGIC PILLARS



**Brand marketing**

**Fly to Hawai'i,  
Get inspired**



**Hawaiian culture**

**#STORIES OF ALOHA**



**Natural resources**

**#FIND YOUR ALOHA**



**Industry & community collaboration**

**#KULEANA CAMPAIGN**





MAHALO!

***KAM-SA-HAM-NI-DA!***



HAWAII TOURISM

JAPAN

ハワイ州観光局

# 2020 BMP - JAPAN

Eric Takahata

Managing Director




# MARKET CONDITIONS

HAWAII TOURISM

JAPAN

ハワイ州観光局



# Market conditions

---

## Japan's economic overview

0.3%  
GDP growth  
forecasted  
(2020)

2.2%  
unemployment  
rate  
(Jul 2019)  
*26-year low*

1.2%  
growth in  
employee  
compensation  
(2020)

# Market conditions

---

## Currency exchange

107 ¥  
exchange  
rate  
(Sep 2019)

37.1%  
consumer  
confidence  
index  
(Aug 2019)

10%  
consumption  
tax  
(from Oct 2019)

# Market conditions

---

## Key trends

1. Global economic threats
  - US-China trade war
  - Escalating tensions between Japan and South Korea

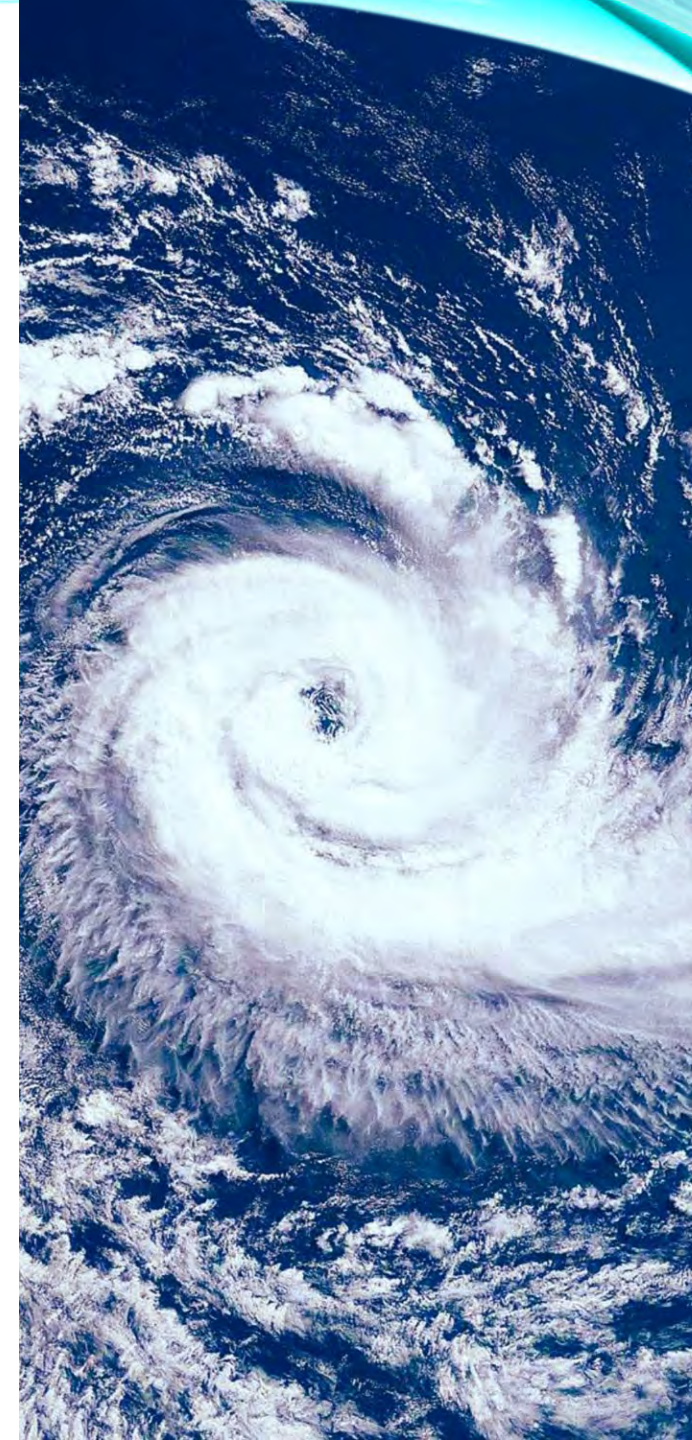


# Market conditions

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## Key trends

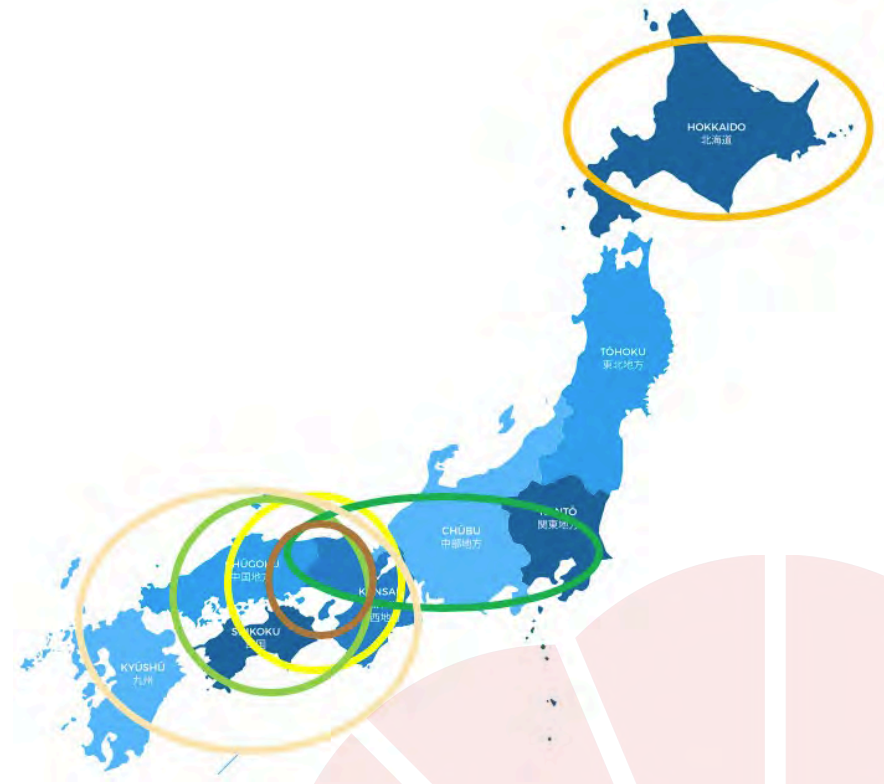
2. Japan's outbound travel instability
  - Consumption tax hike
  - Declining population  
(lowest level in recorded history)
  - Inclination to save
  - Appeal of closer destinations
  - Natural disasters



# Market conditions

## Japan natural disasters (2018)

Natural Disasters	Dates (2018)	Area	Economic Loss
Earthquake	9/9	Hokkaido	\$1.25+ billion
Typhoon 21 (Jebi)	8/28 - 9/5	Kinki	\$13+ billion
Typhoon 20 (Cimaron)	8/18 - 8/24	Kinki, Shikoku	\$100+ million
Typhoon 12 (Jongdari)	7/25 - 8/3	Kinki, Kanto	\$715+ million* (China included)
Torrential Rains	6/28 - 7/9	Kinki, Chugoku	\$10+ billion
Earthquake	6/18	Kansai	\$3.25+ billion



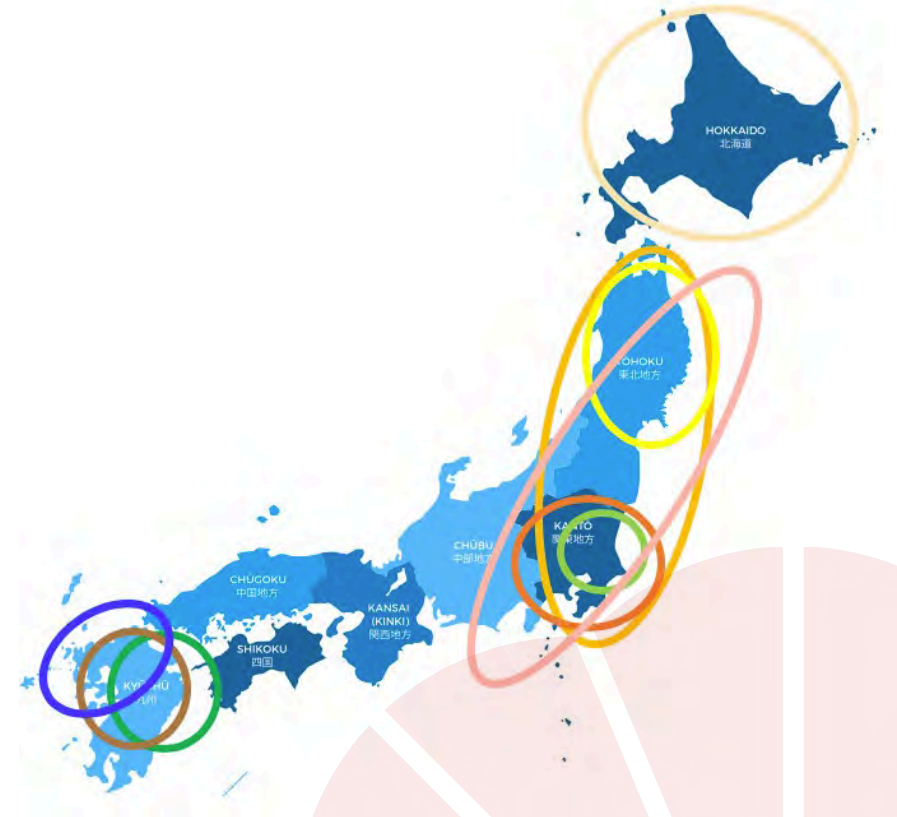
Total major natural disasters: 6  
 Total economic loss: \$28.3 billion



# Market conditions

## Japan natural disasters (2019)

Natural Disasters	Dates (2019)	Area
Typhoon 19 (Hagibis)	10/11-13	Kanto, Koushinetsu, Tohoku
Typhoon 15 (Faxai)	9/5-9	Chiba, Kanto
Torrential Rains	8/26-28	Saga, Fukuoka, Kyushu
Earthquake	8/4	Fukushima, Tohoku
Earthquake	6/18	Yamagata, Tohoku
Earthquake	5/25	Chiba, Kanto
Earthquake	5/10	Miyazaki, Kyushu
Earthquake	2/21	Hokkaido
Earthquake	1/3	Kumamoto



Total major natural disasters: 9  
Total economic loss: TBD

HAWAII TOURISM

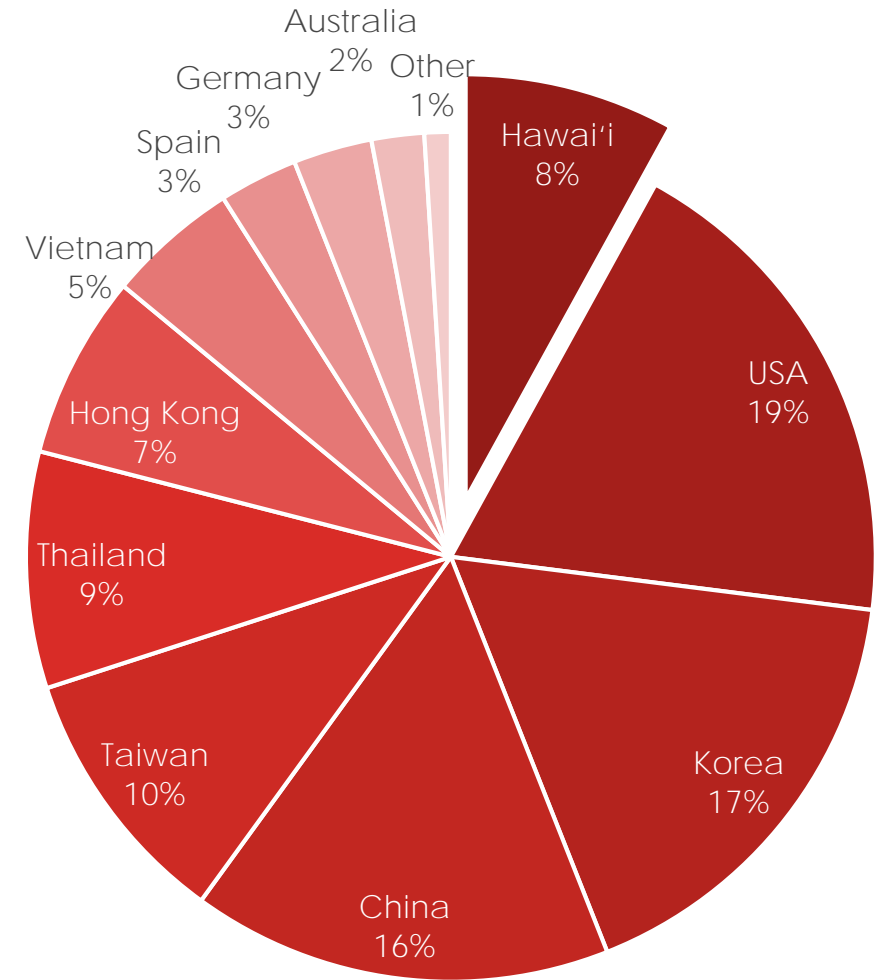
JAPAN  
ハワイ州観光局

# Market conditions

## Key trends

### 3. Japanese Outbound Market

- 11.2 million total Japanese outbound travelers (incl. business trips) as of August 2019 (+8.3%)
- Hawai'i holds an 8% Share



# Market conditions

---

## Key trends

### 4. 2020 Tokyo Olympics

- Temporary boost to Japan's economy (increase in personal consumption and inbound travel demand)



# Market conditions

---

## Air seat synopsis

1. **16 new international slots** at Haneda Airport  
**3-5 slots anticipated for Hawai'i**
  - New product development
  - New opportunities for first-timers from regional cities



# Market conditions

---

## Air seat synopsis

2. Rise of FIT travelers from Tokyo
  - Narita and Haneda comprise of 70% of market
3. Airline partnerships spur competition
4. Japan airlift to Hawai'i forecasted at 2.17 million seats in 2020 (+10%)






# TRAVEL TRENDS

HAWAII TOURISM

JAPAN

ハワイ州観光局



# Travel trends

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Media preferences: Digital, digital, digital!

- Rise of environmental stewardship messaging
- Departure from single channel to multi-level platform marketing
- User Generated Content (UGC), influencer and micro-influencer marketing



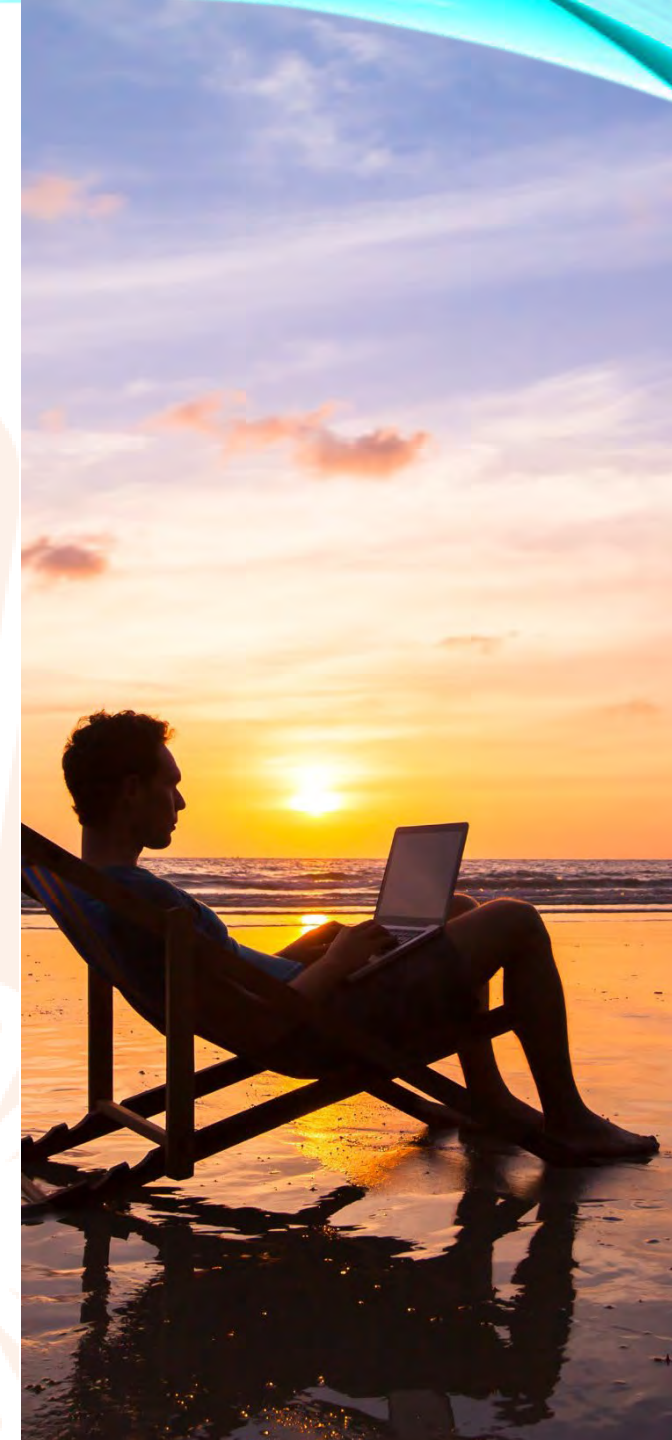
# Travel trends

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## General channel distribution

How do consumers shop for destination inspiration?

- Word of mouth, digital, various media
- Rise of conscious consumers - locavores, glamping, societal impact concerns
- Experienced-based consumption
- Workation - travel combining work and vacation
- Sustainability/health tourism/wellness





# Travel trends

---

## General travel trends

- Rising world tourism population
  - Japan's steady outbound travel growth
- Rebound of competing destinations
  - Europe, Thailand, Vietnam, Guam
- Growing ecotourism initiatives
- Japan labor reform initiatives



# TARGET AUDIENCES

HAWAII TOURISM  
JAPAN  
ハワイ州観光局

# Target audiences

---

## Trip persona targets

- Household Income \$100,000+
- Households/families with multiple generations
- Consumers in their 30s and 40s
- Single households targeting health/wellness, nature and workations
- Couples with and without children
- Millennials

HAWAII TOURISM

JAPAN

ハワイ州観光局

JTB, HIS, JAL, ANA, JCB, CPB, Japan sub-committee



# Target audiences

---

## Trip persona targets



High value  
travelers



Romantic  
couples



Experience  
seekers -  
millennials



Multi-generation

# Target audiences

---

## Key geographic target areas

### MAJOR REGIONS

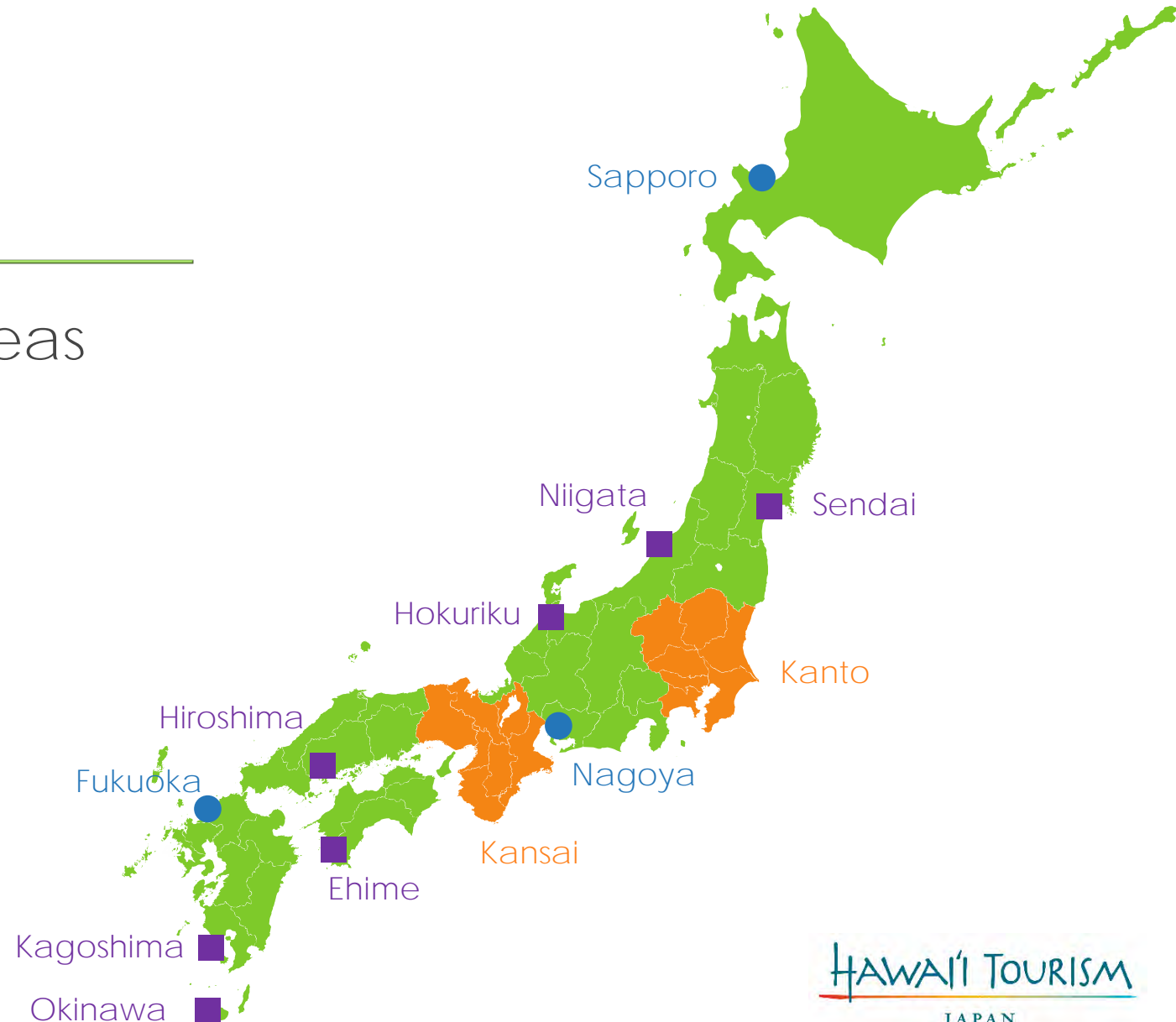
Kanto and Kansai

### CITIES WITH DIRECT FLIGHT SERVICE

Nagoya, Sapporo and Fukuoka

### CITIES WITH STRONG FEEDER FLIGHT ACCESS

Sendai, Niigata, Hokuriku, Hiroshima, Ehime, Kagoshima and Okinawa






# CONSUMER STRATEGY

HAWAII TOURISM

JAPAN

ハワイ州観光局



# Consumer strategy

---

## General approach

- Target marketing – speak to defined audiences to attract and convert high-value travelers
- Amplify content - educate visitors on Hawai'i's natural resources and authentic Hawaiian culture while driving engagement



# Consumer strategy

---

## General approach

- Industry and nonprofit partnerships - develop community initiatives that enhance residents' and visitors' experiences
- Signature events – promote positive resident and visitor interaction
- 4 pillars marketing campaigns – align all initiatives with brand marketing, Hawaiian culture, natural resources and community





# Consumer strategy

---

## Core brand messaging

- Hawai'i through lens of the past
  - Hawai'i is not about the beach, Diamond Head, shaved ice and loco moco



# Consumer strategy

---

## Core brand messaging

- Hawai'i today
  - Enlighten visitors about the aloha spirit through experiences and education
  - Inspire a deeper appreciation of Hawai'i's natural beauty, local community, historic significance and cultural depth



# Consumer strategy

---

## Core brand messaging

- Capitalize on the rich historical and cultural alignment between Hawai'i and Japan
- Tailor messaging to appeal to specific interests of target audiences

(High value traveler, romance, millennial, first-timer and further differentiate by island)



# Consumer strategy

---

## Advertising, PR, media FAMS, promotions

- Select platforms that align with target audiences (digital, OOH, social media)
- Promote collaborative content/2-way UGC campaigns
- Target marketing efforts specific to each island
- Differentiate repeat and first-timer strategies
- Position surfing as Hawai'i's state sport to capitalize on 2020 Tokyo Olympics introduction



# Consumer strategy

---

## Campaign targets

1. Affluent market
  - Mileage club and credit card members
  - Product development with retail outlets
2. Romance market
3. Regional city first-timer acquisition
4. Millennial market ambassador program



ハワイ州観光局 & TABIPPO 公認  
**Ambassador · HAWAII**  
-アンバサダーハワイ-

「ハワイ」はこれからの旅行・観光業界の未来を作っていく旅人を中長期プログラムです。世界中の旅人から愛される土地「ハワイ」をメインテーマとコミュニティを創ります。あなたも日本の次世代を創り上げる人材にな



# Consumer strategy

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## Creative assets

- Build upon HVCB's Share Aloha and Hawai'i Rooted campaigns
- Expand library assets to include vertical videos, VR, short movies






# TRADE STRATEGY

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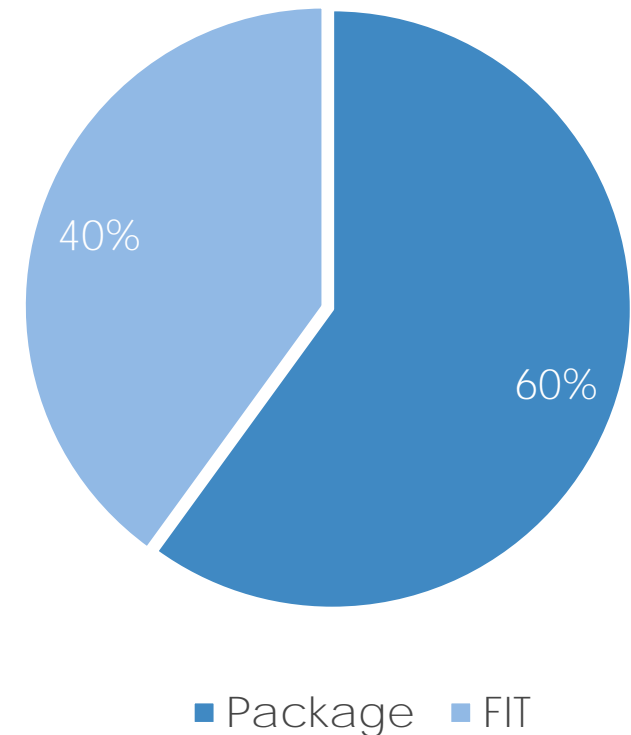
# Trade strategy

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## Travel trade initiatives

- Top airlines, wholesalers, OTAs and retail agents – sales/promotions with highest ROI
- Educational training programs using enhanced technology (webinar, VR)
- Augment FAM tours by collaborating with airlines, partners and stakeholders
- Customize promotions for trade partners that align with goals/objectives

% of total Japanese travel to Hawai'i





# Trade strategy

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- HTJ's hallmark educational platform promoting Hawai'i and its history, culture and community
- Over 18.5k Hawai'i specialist travel agents in 210 branches
- Wholesalers' new hire training programs
- Charitable contributions to local NPOs





MCI

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# MCI

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## MCI strategy

- Position Hawai'i as the closest U.S. destination with consistent airlift and abundant accommodation options
- Develop new initiatives targeting specific MCI markets
- Leverage strong wholesaler/organizer relationships to generate quality leads



## 7. MCI

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### Target audience

- Incentive
- Education
- Sports
- Entertainment
- Attendance building

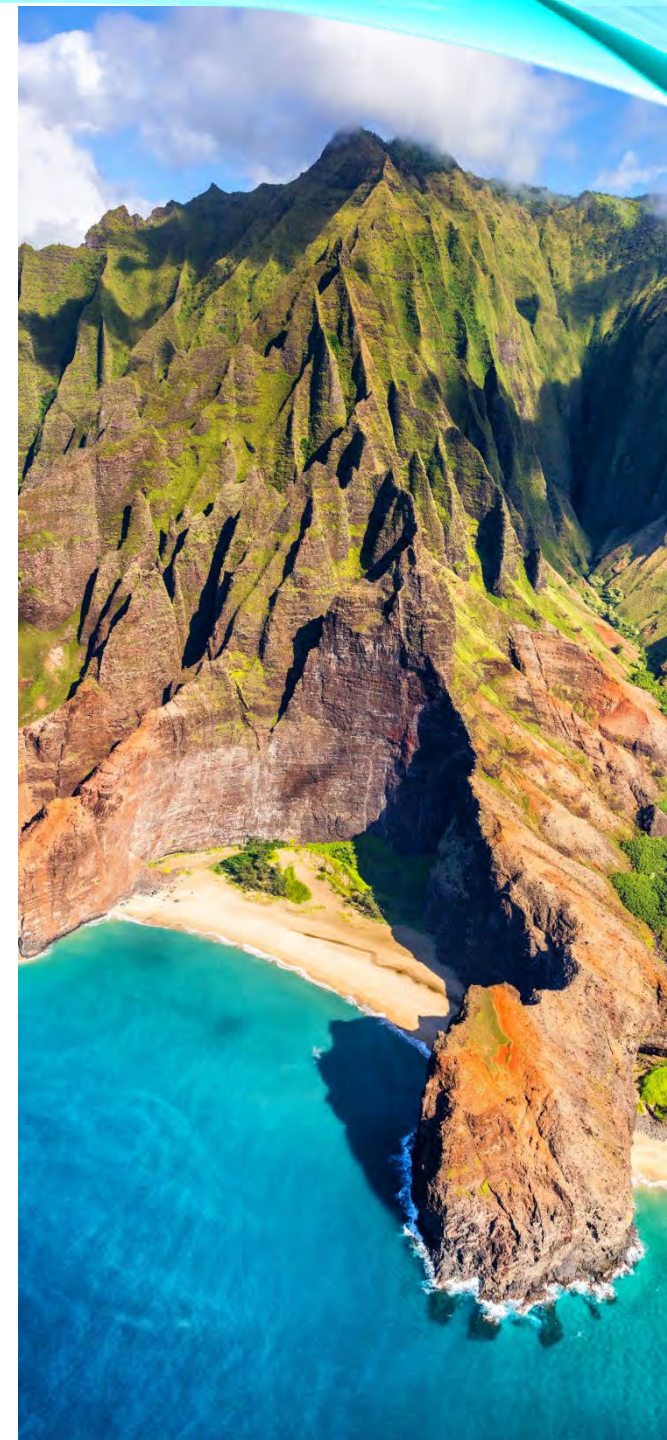


## 7. MCI

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### Lead generation

- Smaller groups to neighbor islands
  - Incentive and education
- Regional city strategies
  - Cities that utilize feeder flights
  - MICE seminars and workshops
  - Airline joint promotions
- Responsible tourism focused organizations






# RESPONSIBLE TOURISM

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# Responsible tourism

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## Distribution of Hawai'i Rooted, Kuleana and travel tips

- Translate and repurpose HVCB and DLNR assets for distribution across Japan
- Showcase segments through digital marketing platforms
- Target environment/nature media in outreach efforts



# Responsible tourism

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## Responsible tourism initiatives

- Create sustainable tourism package products with promotional support
- Facilitate activities that educate/promote Hawaiian culture (e.g., Hōkūle‘a documentary, ‘Ōlelo Hawai‘i study sessions)
- Work with local NPOs to enhance visitor experiences and build community engagement





# Responsible tourism

## Responsible tourism activities

- Sea Cleaners beach clean-up with HTO: Japan initiatives include Hawaiian Airlines at Chigasaki on 10/5 and Kamogawa (Kyoto) on 10/6
- Sea turtle display at JATA's Tourism Expo in Osaka using marine debris
- 'Ōlelo Hawai'i workshop



# Responsible tourism

## Responsible tourism activities

- Work with the DLNR, UH and NOAA to share informational materials with Japanese visitors
- Local 2030, Aloha + Challenge
  - Collaboration with Blue Planet Foundation and AKB48
- Educational seminar and movie blitz onboard the Hōkūle‘a in cities including Sapporo, Tokyo, Yokohama, Nagoya, Osaka and Hiroshima



**Viewing Hawai'i Wildlife**  
Ocean recreation in Hawai'i can include encounters with marine wildlife. For their protection and your safety, view them responsibly!

Sea turtles, monk seals, dolphins and whales are wild animals and protected under state and federal laws.

**Responsible Viewing**  
View from a distance. Use binoculars or your camera's zoom for a close up.  
Do not disturb sea turtles or monk seals sleeping on the beach.  
Never touch, chase, or feed. Animals are wild, unpredictable and protected.  
Limit viewing time to a few minutes.  
Never swim with spinner dolphins — they rest and nurture their young during the day.  
View dolphins and whales from a boat or from shore.

**Viewing Distances**  
**Sea turtles**  
View from at least 10 feet (3 meters) — on land and in water.  
**Hawaiian monk seals**  
Stay behind any signs or barriers.  
Stay back 50 feet (15 meters), if no barriers.  
**Dolphins**  
Stay back at least 50 yards (45 meters).  
**Humpback whales**  
Do not approach within 100 yards — federal law.

**Reporting**  
NOAA Statewide Hotline for Marine Animal Emergencies (sea turtles/seals/dolphins/whales) 1-888-256-9840  
For illegal or suspicious activity: 1-800-853-1964 or (808) 643-DLNR (3567)  
Email photos and video to: RespectWildlife@noaa.gov

**NOAA FISHERIES** National Marine Fisheries Service Pacific Islands Regional Office

**NOAA: アメリカ海洋大気庁**  
Translated by UH Mānoa, PŌHO

**ハワイの野生海洋生物の保護について**  
ビーチ滞在時やマリンスポーツ中に、ウミガメ、ハワイアンモンクシール(アザラシ)、イルカ、クジラに遭遇することがあります。  
ウミガメ、ハワイアンモンクシール(アザラシ)、イルカ、クジラ等の野生海洋生物は、ハワイ州法とアメリカ連邦法によって保護されています。違反した場合は罰金が科せられます。  
野生海洋生物はとてもデリケートなため、ビーチ滞在時やマリンスポーツ中に遭遇した場合はご自身の安全のためにもマナーを守って観察すること  
**推奨距離以内に近づかないこと**

推奨距離			
ウミガメ	ハワイアンモンクシール	イルカ	ザトウクジラ
3メートル(10フィート)以上	15メートル(50フィート)以上	45メートル(30ヤード)以上	90メートル(300ヤード)以上

**マナー**  
● イルカと一緒に泳がないこと  
● イルカは目には見えても、呼吸を止めていること  
● ビーチで寝ているウミガメやハワイアンモンクシールの目を覚まさないこと  
● 触ったり、追いかけたり、入さを舐めたりしないこと  
● 長時間、観察しないこと  
● カメラやドローンの撮影機材も近づかず一定の距離から観察すること  
● イルカやクジラを見る時はボートや岸など離れた場所から観察すること





Putting it all together...

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## Brand Marketing

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In 2020, HTJ will drive its core brand messaging to target audiences and attract high-value visitors in the affluent, romance, multi-generation and millennial markets while capitalizing on the Olympic Games in Tokyo.

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## Hawaiian Culture

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Aloha Program will be used as the vehicle for cultural practitioners to inspire Hawai'i experiences and educational opportunities that perpetuate Native Hawaiian culture while sharing Hawai'i's rich history.

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## Natural Resources

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In addition to new package development, responsible tourism will be reinforced by educating visitors to respect Hawai'i's fragile environment pre-arrival and while on island through joint initiatives with DLNR, UH and NOAA.

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## Community

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Focus will be made on building community engagement by collaborating with local NPOs and promoting events that enhance experiences for visitors and residents.

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HTJ's implementation framework for 2020 will be guided by the 4 pillars that represent the essential investment towards Hawai'i's visitor industry future and long-term success.



Brand Marketing



Hawaiian Culture



Natural Resources



Community





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MAHALO

有難うございました！