

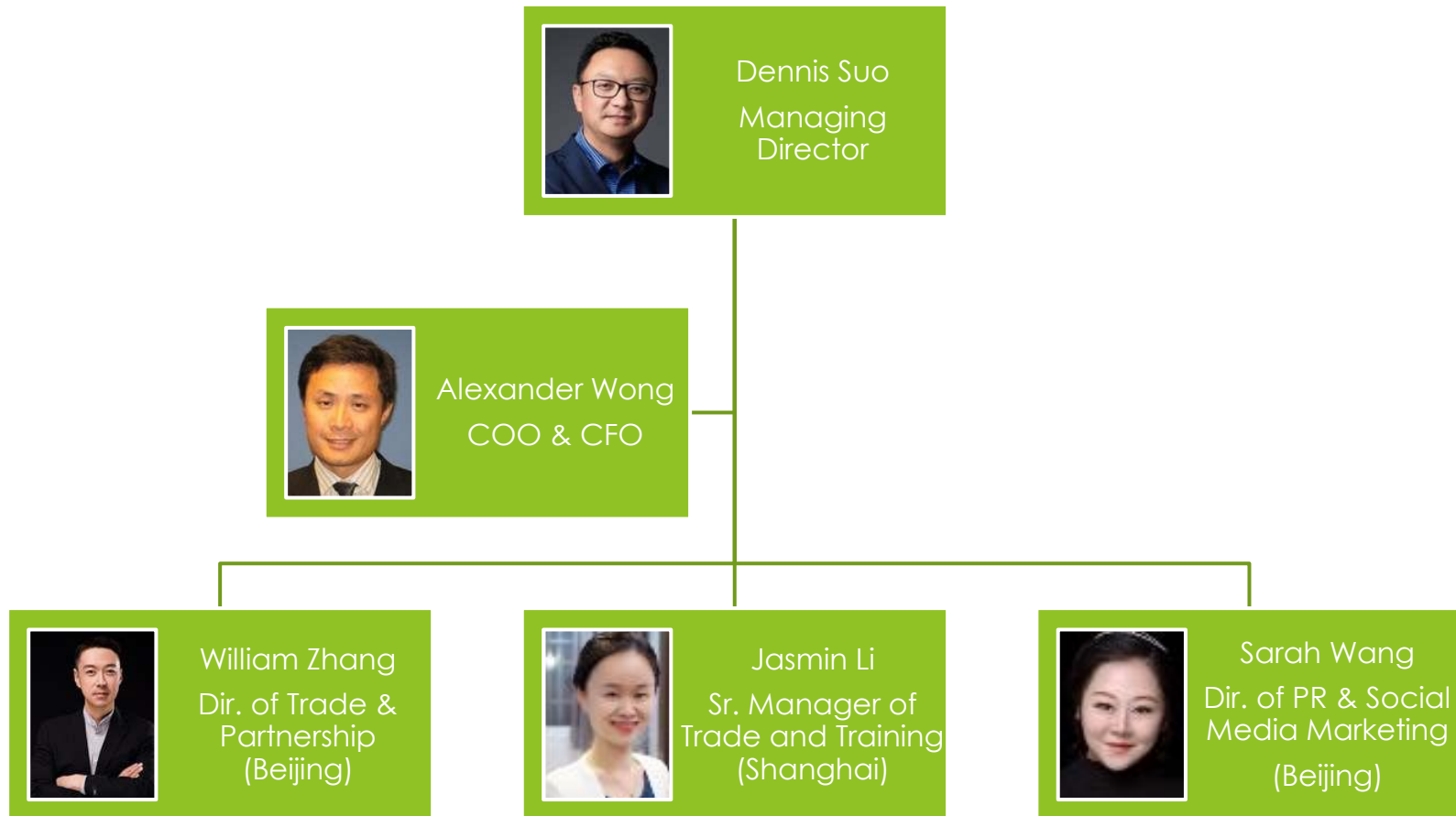


2023 Hawai'i Industry Partners Group Meeting

8.25.2023

Dennis Suo – Managing Director
Alexander Wong - COO

HAWAII TOURISM CHINA TEAM



MARKET SITUATION



GENERAL ECONOMY

► CNY vs. USD

7.15 vs. 6.75 LY, -6.15% (July 2023)

► GDP

+3.3% in 2022, +5.1% in 2023 (FC)

► Urban Unemployment Rate

5.6% (YTD 2023) vs. 5.5% (2022)

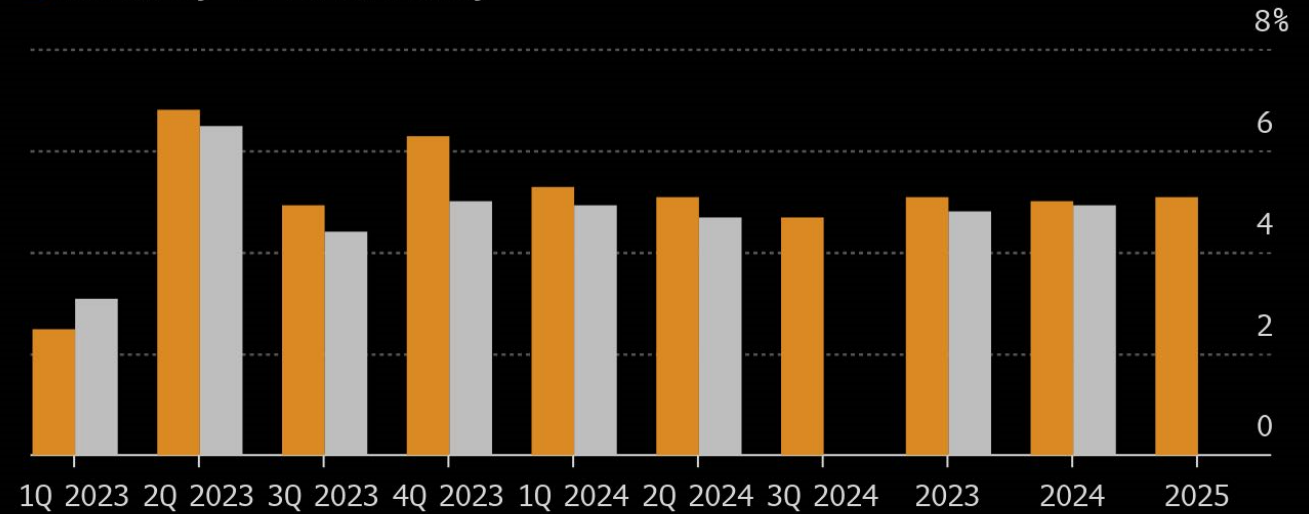
► Annual Inflation Rate

1.2% (FC 2023) vs. 2.1% (2022)

China's Growth Outlook Upgraded

Economists raise GDP growth forecasts as country reopens

■ New survey ■ Previous survey



Source: Bloomberg survey

Note: Previous forecasts for 3Q 2024 and 2025 are not available.

Bloomberg

OUTBOUND TRAVEL

Chinese
travel
trade
survey
findings
(Dragon
Trail
Research):

The millennial market dominates travel trade sales in 2023

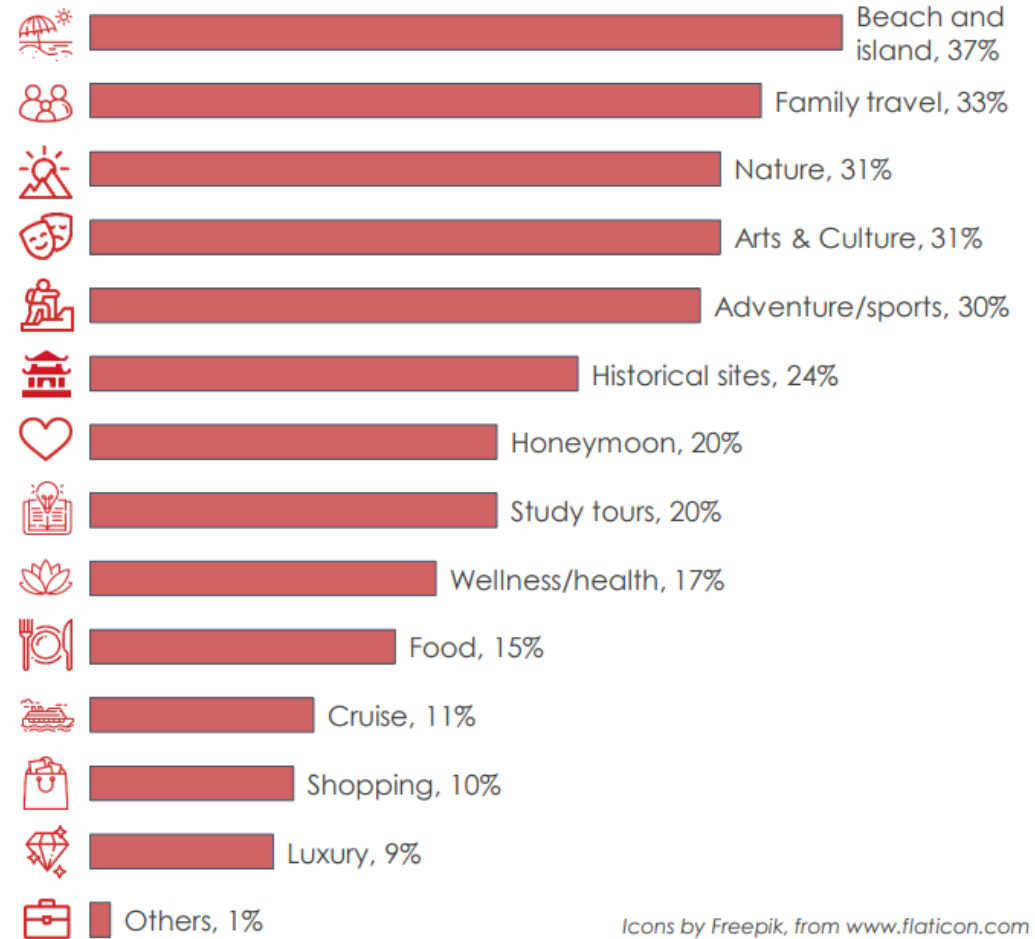
Focus on independent and small group travel

Beach vacation & nature, arts and culture, family travel, and special experiences are selling best

Quality and experiences are valued over low prices

Visas and travel costs are the leading obstacles to recovery

Which travel themes are most popular in 2023? (N=101)

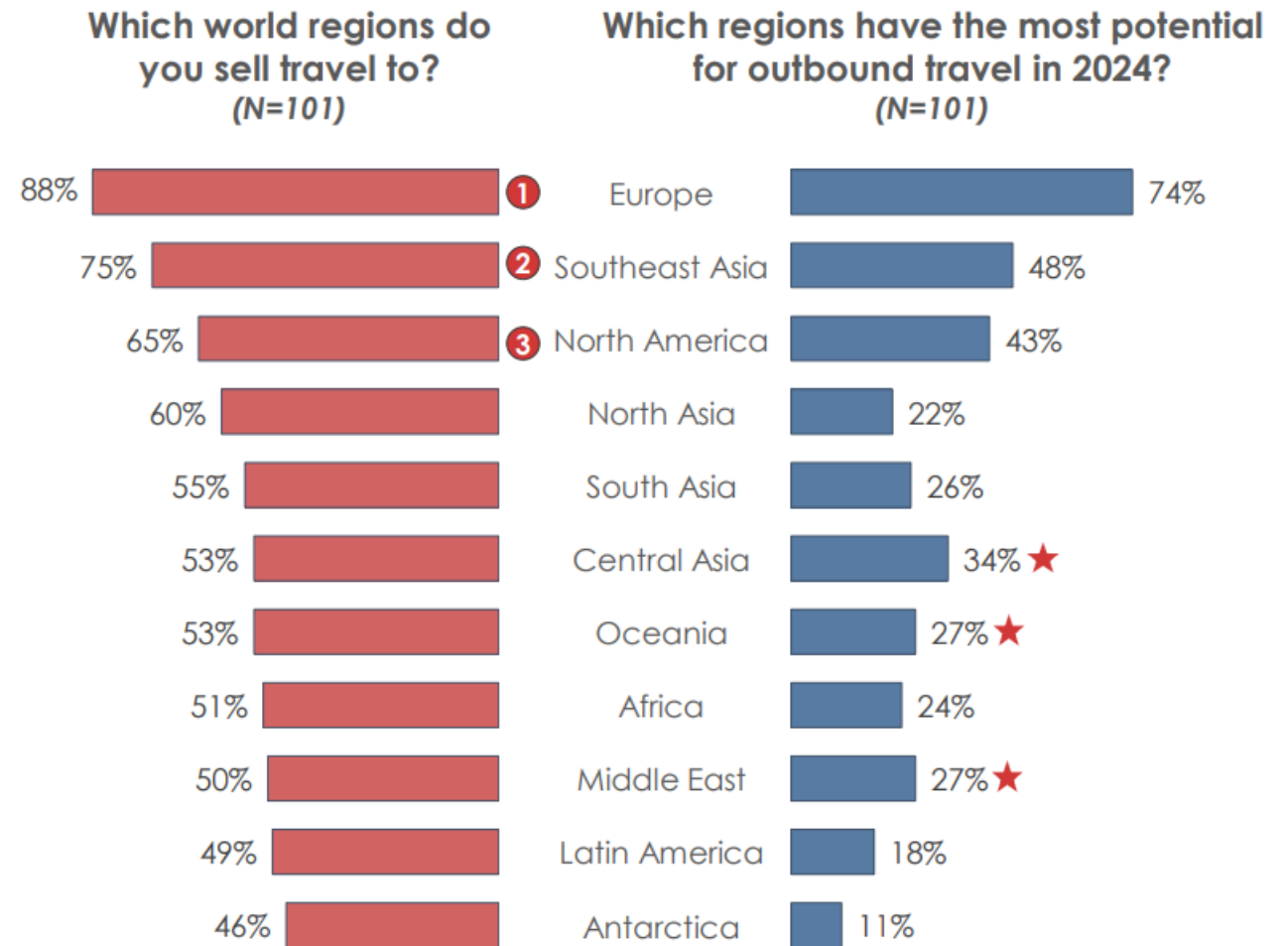


Icons by Freepik, from www.flaticon.com

OUTBOUND TRAVEL

Chinese travel trade survey findings
(Dragon Trail Research):

- World regions: For travel trade sales, Europe offers high potential for the coming year, North America is ranked #3



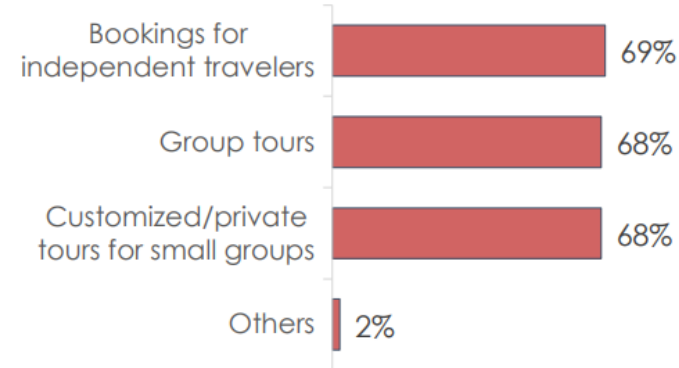
TRAVEL SENTIMENT

Chinese travel trade survey findings
(Dragon Trail Research):

- Independent travel and small group tours are the most popular types of travel now

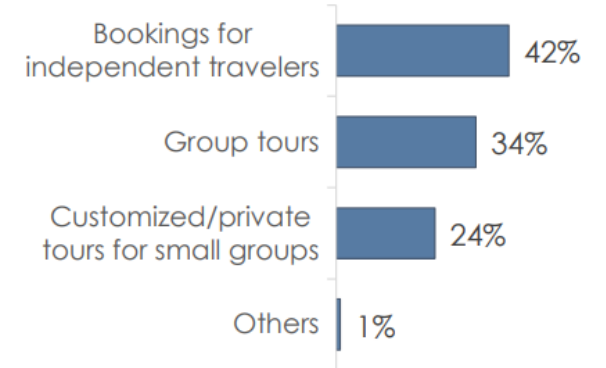
Which kind of travel products do you sell?

(N=101)



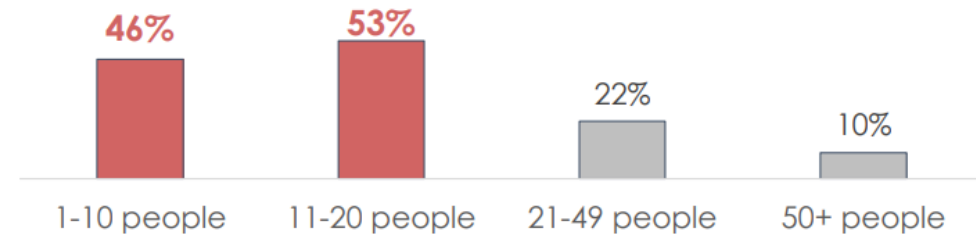
In your experience, which kind of travel products are the most popular in 2023?

(N=101)



What size group tours are most popular now?

(N=101)



AIR CAPACITY



厦门航空 XIAMENAIR

- **24** flights weekly China <—> U.S.*
- 4 Chinese & 3 U.S. carriers (reciprocity)
- Connecting flights via Japan & Korea

China - U.S. Flights

Direct Flights:

United Airlines	UA858	Shanghai (PVG) - San Francisco (SFO)	MON / THU / SAT / SUN
Delta Air Lines	DL288	Shanghai (PVG) - Seattle (SEA)	THU / SAT
Delta Air Lines	DL284	Shanghai (PVG) - Detroit (DTW)	WED / SUN
American Airlines	AA128	Shanghai (PVG) – Dallas (DFW)	TUE / FRI
Air China	CA987	Beijing (PEK) - Los Angeles (LAX)	SUN
Air China	CA769	Shenzhen (SZX)- Los Angeles (LAX)	TUE
China Eastern Airlines	MU587	Shanghai (PVG) - New York (JFK)	TUE
China Southern Airlines	CZ327	Guangzhou (CAN) - Los Angeles (LAX)	THU / SAT
Xiamen Airlines	MF829	Xiamen (XMN) - Los Angeles (LAX)	WED / SUN

(These schedules are subject to change)

*After September 30, will double to 48 flights weekly



AIR CAPACITY

Ideal connecting flight from (Japan) Narita, Haneda, (Korea) Incheon, same day transit

Weekly flights to China: JAL 52, ANA 46, KE 99, OZ 89

Total 18 cities to connect, (Beijing, Shanghai, Shenzhen, Qingdao, Tianjin, Guangzhou, Hangzhou, Xi'an, Dalian, etc.)

Average economy ticket price round trip \$1,500, business class \$4,000



ASIANA AIRLINES



COMPETITION



Group tour to Europe officially resumes from March 2023



Thailand to welcome 5m Chinese visitors in 2023



Charter flights to Maldives 2023 LNY



Air Tahiti Nui - 2 flights weekly Tahiti to Tokyo in Oct. 2023, China roadshow



New Zealand will receive 150-200K Chinese tourists in 2023



China to Dubai increased to 46 non-stop flights weekly from March 2023



Australia received 110K Chinese tourists Jan - Apr, flights restored to 54% of 2019

大溪地航空亚洲航线10月底复航 成都线下推介会受青睐

旅行社资讯网 2023-07-17 22:41

作为享誉世界的高端海岛度假胜地，大溪地群岛（法属波利尼西亚）将于2023年10月底正式恢复亚洲航线。搭乘大溪地航空Air Tahiti Nui全新波音787-9梦想客机，中国游客将可以从日本东京转机，更便捷地飞往大溪地群岛。



©Air Tahiti Nui

CHINA



澳大利亚旅游局 >



演职员



特别出演：澳大利亚各州及领地

舞美：澳大利亚自然风光

声效：澳大利亚丛林之声

灯光：澳大利亚内陆暖阳



1月18日 6天4晚



1月22日 1月27日 7天5晚



TARGET AUDIENCE

TARGET AUDIENCE

MILLENNIUM INDIVIDUALIST (MI)



FAMILY



AFFLUENT & HIGH NET WORTH INDIVIDUAL (HNWI)



1.Desirability for
Island Destination

2.Accessibility
BJ/SH/CD

3.Disposable
Income

4.US Visa Issuance

HAWAII TOURISM
CHINA

CORE BRANDING MESSAGE

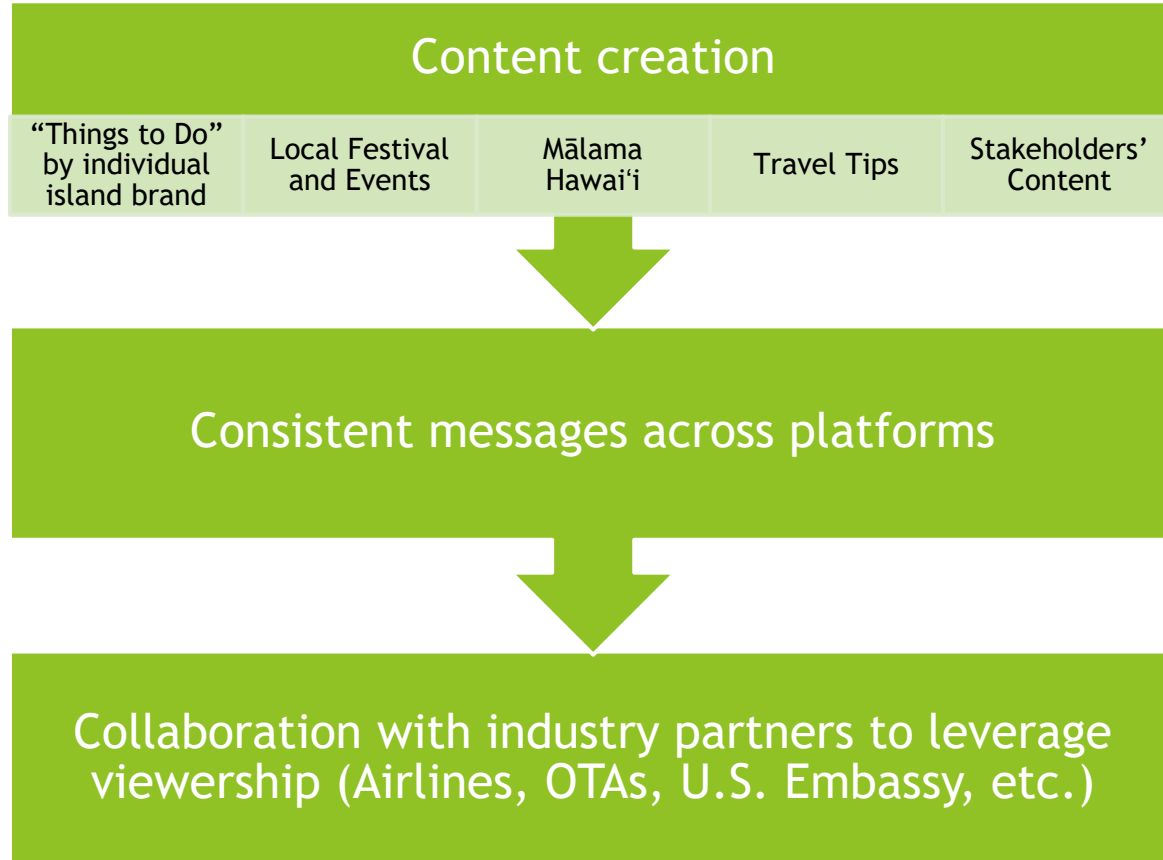


**B2B - Trade FAM/show/training,
OTA itinerary design, airlines coop**



YTD REVIEW (JAN-AUG)

SOCIAL MEDIA MARKETING



SOCIAL MEDIA MARKETING

×

夏威夷州旅游观光局 >

...

×

夏威夷州旅游观光局 >

...

×

夏威夷州旅游观光局 >

...

×

夏威夷州旅游观光局 >

...



Things to Do 陆地丛林探险

远离环绕岛屿的海滩，
进入可爱岛郁郁葱葱的奇幻绿色世界。
无论是悠闲地骑马到偏远的瀑布，
穿越丛林高空滑索，
还是驾驶ATV越野车从洞穴飞驰而出，
这画面让可爱岛上的冒险家们
显得武功非凡，仙气十足。

“中国驾照可以在夏威夷 租车自驾么？”

如果你计划在夏威夷自驾旅行，记得提前预约
租车公司，并准备中国驾照和驾照翻译文件，
以便租车公司核对您的信息。

“从欧胡岛飞往其他岛要多久？”

大部分游客来到夏威夷的第一站会落地欧胡岛，如
果想继续游览其他几个岛屿您可以乘坐夏威夷航空
和莫库莱航空提供的岛间短途航班。在岛屿间旅行
时，建议您至少在航班起飞前90分钟到达机场。

从欧胡岛丹尼尔·K·伊努耶(檀香山)国际机场(HNL)飞往:

- ✈ 夏威夷机场(LIH): 30分钟
- ✈ 茂宜岛卡卢伊机场: 30分钟
- ✈ 西茂宜岛卡帕鲁机场(JHM): 30分钟
- ✈ 莫洛凯岛机场(MKK): 20分钟
- ✈ 拉奈岛机场(LNY): 25分钟
- ✈ 夏威夷大岛希洛国际机场(ITO): 50分钟
- ✈ 夏威夷大岛的埃里森鬼家科纳国际机场(KOA): 45分钟

阿罗哈节

从1946年至今，阿罗哈节现已成为美国最大
夏威夷文化庆祝活动。这是一个在全州范围内为
期一个月的盛大庆典，每年有数千名志愿者
办活动，超过10万人参加。



这个9月，阿罗哈节如期而至，夏威夷的习俗、传统
将再次汇集于此，向世界各地的旅行者传递热情友
善的阿罗哈精神，感受真正的夏威夷魅力。本届阿
罗哈节主题为“Dili‘āina”——我们可以理解为“上

Impression: **800K**
engagement: **60K**
Posts: **52**

SOCIAL MEDIA RANKINGS

WECHAT RANKING



OVERSEAS DMOs WECHAT RANKING Q2 2023

N.	Organization Name	N. of Posts	Total Views	Average Views per Post	N. Views Top Post	Total Likes
01	Macao Government Tourism Office	117	1,634,698	13,972	51,559	3,490
02	Hong Kong Tourism Board	28	285,567	10,199	30,785	1,575
03	Dubai Department of Tourism & Commerce Marketing	92	212,622	2,311	10,967	3,962
04	Region of Valencia Tourism Board	12	57,530	4,794	6,784	145
05	Forever Edinburgh	22	37,650	1,711	3,526	763
06	Queensland Australia	13	25,893	1,992	3,109	164
07	Abu Dhabi Department of Culture & Tourism	15	21,441	1,429	3,052	474
08	Washington DC Convention and Tourism Corporation	12	13,881	1,157	2,411	88
09	DiscoverPhiladelphia	12	12,110	1,009	1,259	35
10	Travel South USA	6	10,369	1,728	2,527	10
11	Hawaii Tourism Authority	13	10,321	794	1,210	179
12	NYC	12	8,540	712	1,453	79
13	Destination Ontario	18	8,300	461	1,287	126
14	ParisTourismOfficial	9	8,076	897	1,916	244
15	VisitSydney	13	7,378	568	823	102
16	Northwest Territories	8	6,269	784	1,310	13
17	Valencia Tourism	13	5,555	427	3,424	55
18	iMelbourne	11	5,431	494	1,181	37
19	YesMilano	6	5,326	888	1,077	79

About the Ranking:
Data Collection Date: 6th July 2023 (12:00)
Ranking Criteria: Accounts are ranked according to the highest number of views for all posts published. WeChat views are unique views.
N. Overseas Destination Marketing Organizations (DMOs) Surveyed: 88

posts for the year included photos celebrating boy band singer Mika Hashizume from Hawaii, videos promoting street dancing and celebrity dining TV shows from Macau, singing performances shared by Hong Kong and Dubai, and a poll about Korean TV shows from Visit Busan.



Top DMO posts from Dubai, Hawaii, and Macau

WECHAT RANKING



OVERSEAS DMOS WECHAT RANKING 2022 Full Year

N.	Organization Name	N. of Posts	Total Views	Average Views per Post	N. Views Top Post	Total Likes
01	Macao Government Tourism Office	381	9,854,718	25,865	100,001	21,087
02	Dubai Department of Tourism & Commerce Marketing	365	949,675	2,602	21,738	17,476
03	Hong Kong Tourism Board	123	659,696	5,363	24,623	5,578
04	Forever Edinburgh	87	208,286	2,394	29,259	3,781
05	Region of Valencia Tourism Board	50	118,942	2,379	5,944	750
06	Queensland Australia	48	94,861	1,976	3,398	809
07	South Australian Tourism Commission	127	83,292	656	2,709	510
08	DestinationBC	33	77,514	2,349	4,043	1,133
09	ParisTourismOfficial	41	52,108	1,271	2,280	1,810
10	Hawaii Tourism Authority	47	45,146	961	2,236	527
11	Tahiti Tourisme	95	44,453	468	1,513	874
12	Travel South USA	23	42,814	1,861	2,553	116
13	DiscoverPhiladelphia	47	41,082	874	2,037	205
14	NYC	41	40,765	994	2,538	547
15	Washington DC Convention and Tourism Corporation	48	37,646	784	2,952	540
16	iMelbourne	42	35,290	840	2,156	335
17	YesMilano	27	33,465	1,239	2,952	633
18	Visit Okinawa Japan	54	31,924	591	1,513	880
19	VisitSydney	54	31,254	579	1,523	380
20	Geneva Tourism	14	27,316	1,951	2,962	657

About the Ranking:
Data Collection Date: 18th January 2023 (12:00)
Ranking Criteria: Accounts are ranked according to the highest number of views for all posts published. WeChat views are unique views.
N. Overseas Destination Marketing Organizations (DMOs) Surveyed: 94

While the top-ranked accounts are similar to 2021 with some small changes in the order, one account with much higher activity is the Hawaii Tourism Authority, which jumped from 41st place for total views in 2021, to 10th in 2022. The island state posted 47 articles in 2022, up from just six, although average views per post did fall by 14.5%.



WEIBO RANKING

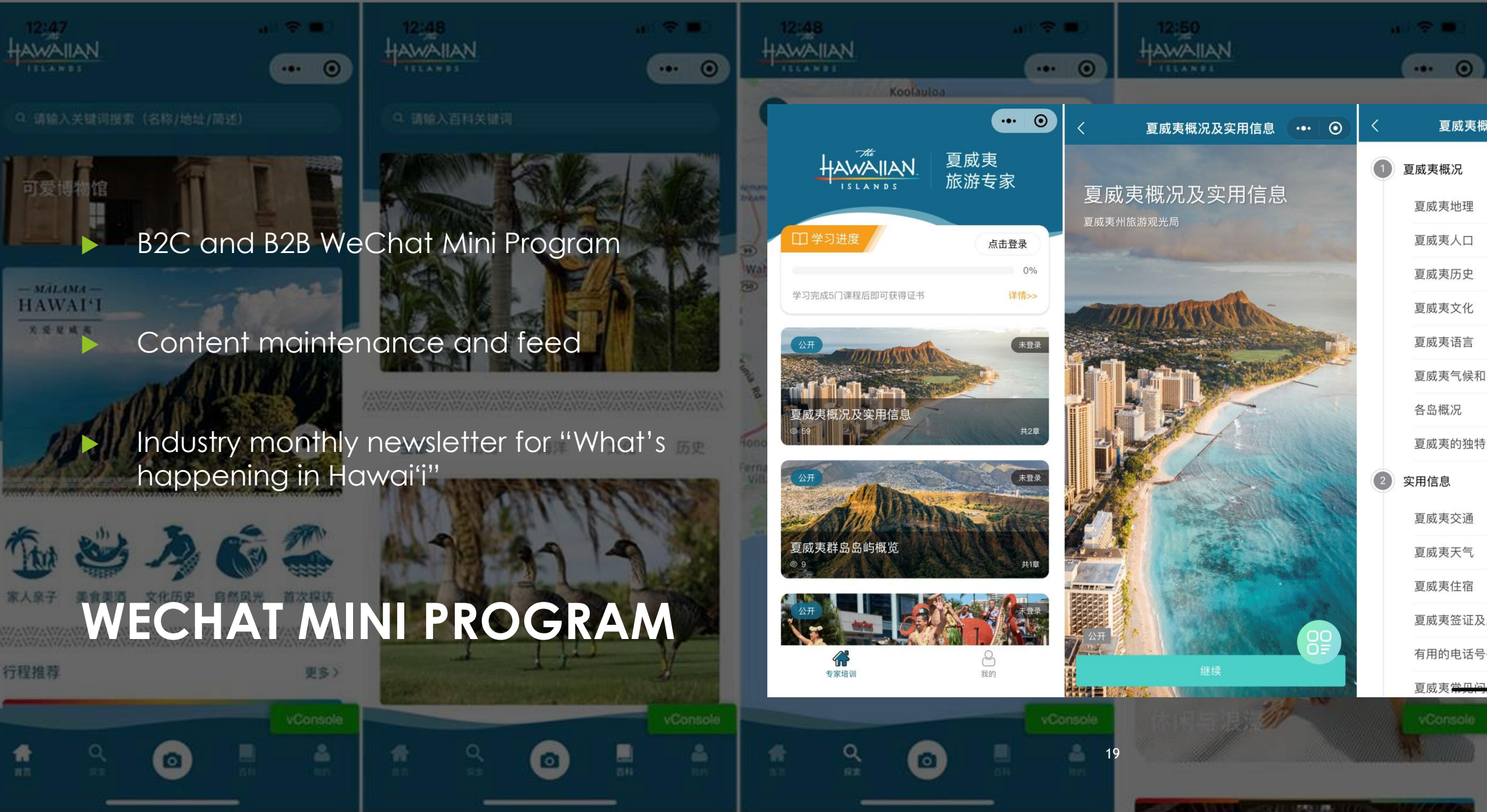


OVERSEAS DMOS WEIBO RANKING 2022 Full Year

N.	Organization Name	N. of posts	N. of followers	Total N. of Engagements	Engagement Rate
01	Macao Government Tourism Office	627	1,625,115	58,520	0.07%
02	Discover Hong Kong	565	2,514,385	52,760	0.04%
03	Forever Edinburgh	555	86,423	35,180	0.79%
04	Dubai Department of Tourism & Commerce Marketing	416	650,558	23,287	0.07%
05	Angwon Province Tourism Board	345	798,308	13,943	0.03%
06	BAYERN TOURISMUS Marketing GmbH	702	207,288	12,272	0.11%
07	Gunma	339	58,962	11,122	0.36%
08	Vienna Tourism	345	175,750	10,268	0.11%
09	Tourism Tropical North Queensland	263	28,433	10,078	1.17%
10	Go Hawaii	80	248,827	9,445	0.07%
11	Nagasaki Tourism Office	211	76,250	9,421	0.24%
12	Catalan Tourist Board	403	171,558	8,911	0.10%
13	NYC	363	658,500	8,696	0.03%
14	Busan Tourism Organization	157	959,442	8,601	0.02%
15	Visit Berlin	565	152,654	8,318	0.10%
16	Queensland Australia	319	461,192	7,369	0.03%
17	Region of Valencia Tourism Board	659	3,248	7,168	4.51%
18	British Columbia	191	221,096	5,427	0.05%
19	Sabah Tourism	715	398,481	3,802	0.02%
20	Geneva Tourism	121	88,615	3,633	0.08%

*Weibo accounts can be found by adding the above account ID to the end of the URL <https://weibo.com/>

About the Ranking:
Data Collection Date: 13th January 2023 (12:00)
Ranking Criteria: Accounts are ranked according to the highest number of engagements for all posts published.
N. Overseas Destination Marketing Organizations (DMOs) Surveyed: 61



► B2C and B2B WeChat Mini Program

► Content maintenance and feed

► Industry monthly newsletter for "What's happening in Hawai'i"

WECHAT MINI PROGRAM

SOCIAL MEDIA PLATFORMS



WeChat B2C
mini program



WeChat B2B
mini program



Scan QR code to view my channel

WeChat official
account



扫一扫二维码图案，关注我吧

Weibo official
account



搜抖音官方号
86640526532

Douyin official
account



Red official
account

TRADE EDUCATION

- ▶ Live travel trade education session to Spring Tours (**65** pax) on April 28 in Shanghai.
- ▶ Special presentation on Hawai'i to **80** staff from CYTS Tours, one of the leading Chinese outbound travel agencies that specialize in the U.S. tourism business.



TRADE EDUCATION (CONTINUED)

- ▶ Destination training with Brand USA in July (four locations)
 - ▶ Nanjing (Tuniu)
 - ▶ Suzhou (Tongcheng)
 - ▶ Ningbo (Wanda Travel)
 - ▶ Zhejiang (AITS + several others)
- ▶ Brand USA and Red online August seminar – Hawai'i notably featured



US EMBASSY ROADSHOW

- ▶ US Embassy Beijing, US Consulate Shanghai & Wuhan, Education USA, Travel and Tourism Roadshows in April, May & August (Beijing, Shanghai, Wuhan, Guangzhou)
- ▶ **16** US organizations, total over **90** travel trade partners attended
- ▶ Visa Sharing and Exchange Meeting, by Citic Bank and the US Consulate on June 13 in Wuhan, over **50** travel partners participated
- ▶ #ReconnectWithUS# generated **500K** views, **4K** engagement on WeChat and Weibo





CONSUMER EXHIBITION

- ▶ HTC attended the 2nd China (Wuhan) Culture and Tourism Expo in April, with over **2K** exhibitors and **180K** visitors
- ▶ HTC attended the 8th SITE, Shenzhen International Tourism Expo in June, with over **300** exhibitors and **110K** visitors
- ▶ HTC showcased the Hawaiian Islands along with other US destinations

SISTER STATE RELATIONSHIPS – FOSTERING CULTURAL, ECONOMIC AND TOURISM INITIATIVES

- ▶ More than 120 guests, including Vice Governor of Hainan Chen Huaiyu and Lieutenant Governor of Hawai'i Sylvia Luke, attended the 2023 China Hainan Night event on August 4.
- ▶ Organized by the Hainan Provincial People's Government, the event enabled participants to learn more about the Hainan Free Trade Port and discuss potential cultural, economic, and tourism cooperation opportunities between Hainan and Hawai'i.
- ▶ Hainan and Hawai'i established sister state relations since 1992. The two sides have successfully promoted cooperation in the agricultural and trade fields, culture and tourism.



LETTER FROM HAINAN GOVERNOR OFFER OF ASSISTANCE FOR WILDFIRES TO GOVERNOR JOSH GREEN



致：美国夏威夷州州长
乔希·格林阁下

No.QF/LXM/015

尊敬的乔希·格林阁下：

惊悉夏威夷州毛伊岛山火蔓延，给当地民众的生命和安全带来严重威胁，财产遭受巨大损失，对此，我谨代表海南省政府及全体人民，并以我个人名义，向州长阁下及夏威夷州人民表示诚挚慰问！对在此次灾害中遇难的民众表示哀悼。

8月初，我省副省长陈怀宇率团访问夏威夷州，受到卢克副州长及相关部门的热情接待，双方开展了坦诚、深入的交流。早在1992年，海南省与夏威夷州就缔结了友好省州关系。多年来，两地在交流合作中共谋发展，在困难面前守望相助，结下了深厚情谊。

海南省政府深切关注山火对夏威夷州的影响，如有需要，海南愿为夏威夷州人民提供必要的人道主义援助。我相信在州长阁下的英明领导下，夏威夷州人民一定能攻坚克难，早日重建家园。

海南省省长

刘小明

2023年8月11日

(Courtesy Translation)

H.E. Josh Green
Governor of the State of Hawaii, USA

August 11th, 2023

Your Excellency Governor Josh Green,

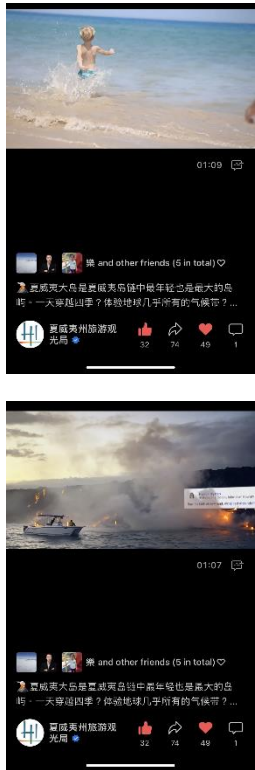
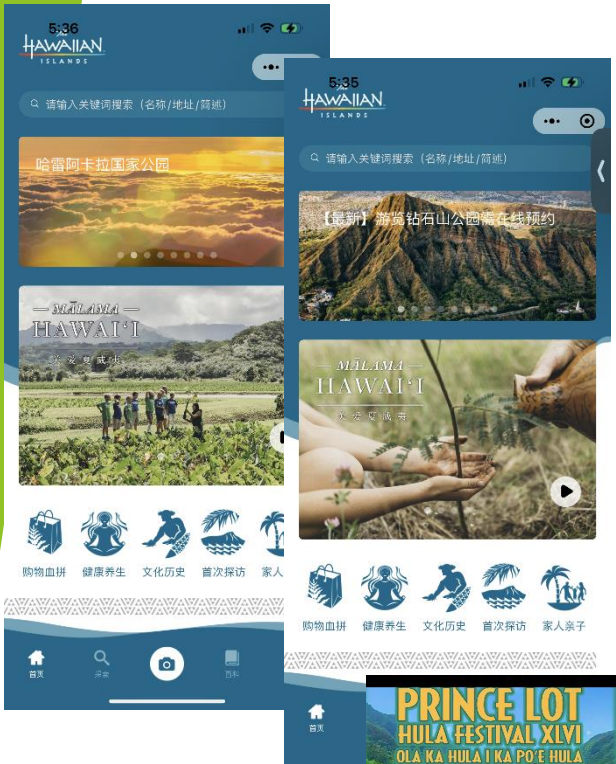
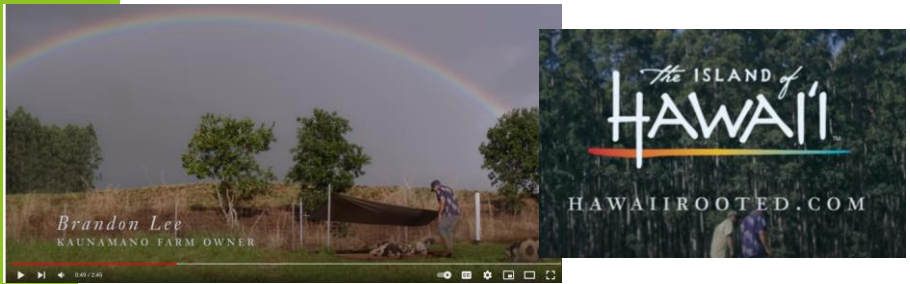
I felt deeply shocked and saddened to learn that wildfires had raged on the Hawaiian island of Maui, seriously threatened the lives and safety of local people and caused massive casualties and great losses. I hereby would like to extend, on behalf of the People's Government of Hainan Province and all the Hainan people and in my own name, our sincere condolences and sympathy.

A delegation, led by H.E. Chen Huaiyu, Vice Governor of Hainan Province had visited Hawaii in early August and was warmly received by Lieutenant Governor Sylvia Luke and the related departments. During the visit, the two sides had conducted sincere and in-depth exchanges. As early as in 1992, Hainan Province and the State of Hawaii have established sisterhood relationship. For years, our two places have pursued common development through exchanges and cooperation and helped and supported each other in the face of difficulties, thus forged deep friendship between us.

The People's Government of Hainan Province is now paying great attention to the impact of wildfires on the State of Hawaii and is willing to provide humanitarian aid for the people of Hawaii if it is necessary. I firmly believe that the people of Hawaii will surely prevail difficulties and rebuild their homes under the wise leadership of Your Excellency.

LIU Xiaoming
Governor of Hainan Province
People's Republic of China

FUTURE PLAN (SEP – DEC)



SOCIAL MARKETING AND WECHAT MINI-PROGRAMS

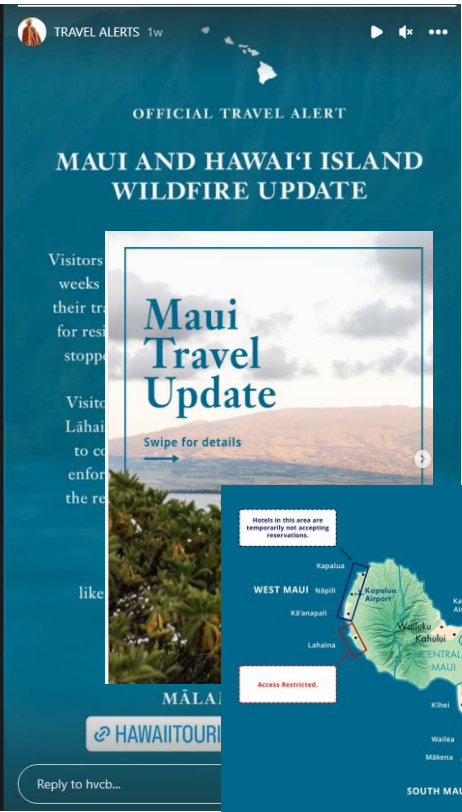
- Social media posting weekly
 - Consistent messages across platforms
 - Collaboration with industry partners to leverage viewership (Airlines, OTAs, US Embassy, etc.)
 - Community Event Programs (CEP)
 - Postings planned for next four weeks:
 - Art of Lei
 - Farm to Table Hawai'i
 - Explore relaxation and romance in Hawai'i
 - Made in Hawai'i
- Content maintenance and feed for WeChat Mini Programs*

*Partnership opportunity – industry stakeholders can provide content for posting and in-kind prizes



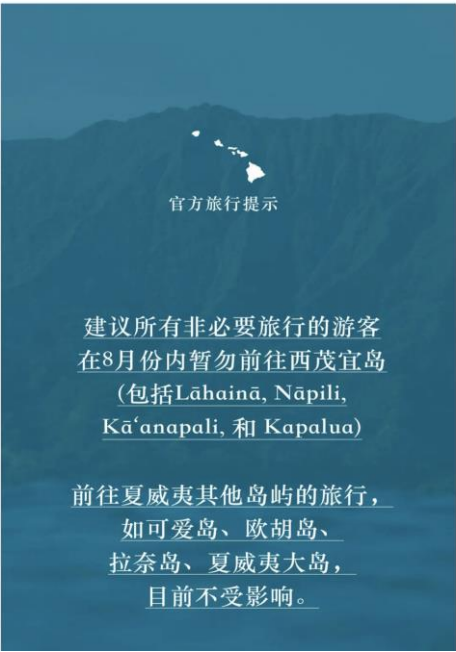
TRAVEL TRADE EDUCATION

- Education/Seminar to OTA/UGC sales about Hawai'i and each individual island's unique brand *
- Partnership with US Embassy Beijing, US Consulates and Education USA
 - ▶ Dalian (September)*
 - ▶ Beijing (September)*
- * Partnership Opportunities - In-Kind for lucky draw promotions



官方旅行提示 | 茂宜岛最新旅行指示地图

夏威夷州旅游观光局 2023-08-20 19:33



MĀLAMA MAUI

- Continue to translate/post Maui Travel Updates across all social media platforms
- Answer all enquiries on social media/travel trade and encourage travel to other parts of Maui (outside of West Maui) and other islands.
- Conduct travel trade education about how to support Maui via zoom/phone calls/small scale training, etc.
- Support Chinese Consulate General LA and local industry partners in assisting Chinese visitors in need.



TRADE MEDIA FAM



November 6-14



Major OTAs,
Travel Media
and Travel KOLs



10-15 Travel
trade partners,
2-3 Travel media



Partner with
Japan Airlines



Multi islands
itineraries



Partnership opportunity – In-kind sponsorship for hotel rooms, meals, ground transport, flights, activities, etc.

AIRLINE & OTA CO-OP

To collaborate with airline and OTA partners for pre-departure package and itinerary design & in-flight marketing.

The partnership co-op funding will be a 1:3 match with one as a cash match and the other two a combination of cash and/or in-kind.

Partnership opportunity – In-kind sponsorships in conjunction with Trade & Media FAM



PARTNERSHIP OPPORTUNITIES SUMMARY



PARTNERSHIP OPPORTUNITIES

ACTIVITY	DATE	DESCRIPTION	LOCATION	COST
TRADE SHOWS				
2023 US Commercial Service Travel and Tourism Roadshow (B2B)	Sep	Jointly organized by Education USA and the Commercial Section of the U.S. Embassy in Beijing, the exclusive networking event connects with airlines, US tour operators, etc.; expected participation ~30	Dalian	In-Kind for lucky draw promotions
2023 US Commercial Service Travel and Tourism Roadshow (B2B)	Sep	Jointly organized by Education USA and the Commercial Section of the U.S. Embassy in Beijing, the exclusive networking event connects with airlines, US tour operators, etc.; expected participation ~30	Beijing	In-Kind for lucky draw promotions
TRADE MISSION				
Trade + Media FAM	Nov	Invite key trade partners and media FAM to come to multi-island and cover voluntourism, agricultural tour and Mālama Hawai'i activities etc.	Hawaiian Islands	In-kind sponsorship, hotel rooms, meals, ground transport, flights, activities etc.
TRAVEL TRADE EDUCATION				
Travel Trade Training	Dec	To train and educate OTAs and retail offline sales agents about Hawai'i and each individual island's unique brand, the Hawaiian culture, and responsible travel / Mālama Hawai'i. Ensure to have a common understanding and appreciation of Hawaiian Cultural Values to promote the safeguarding and protection of the Hawaiian Islands according to sustainability principles.	Online/Offline	Complimentary prizes in kind
WeChat Mini Program	Ongoing	To showcase Mālama Hawai'i, hotels, attractions, activities, facilities and services for both in B2C and B2B channels in WeChat eco system. Includes interactive visual recognition tool on Hawai'i flowers.	Online	Complimentary prizes in kind
Trade co-op program	Q4	To collaborate with airline and OTA partners for pre-departure package and itinerary design & in-flight marketing, in conjunction with Trade + Media FAM.	Beijing, Shanghai	In Kind

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2023

Mahalo
谢谢

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