

# SPRING MARKETING UPDATE 2018

PRESENTED BY

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MARCH 2018

## YOUR UK, SCANDINAVIA & EUROPEAN CO-ORDINATING TEAM



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Manager

## FRANCE TEAM



Annabelle Michaux  
France Director



Manon Grant  
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# MARKET CONDITIONS

# 2018 Market Conditions – Europe

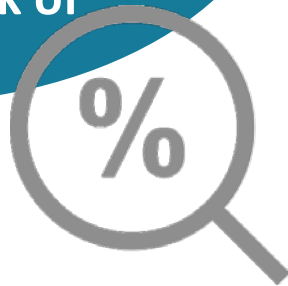
£1 GBP = \$1.39 USD  
€1 EUR = \$1.20 USD



**0%** - European  
Central Bank

**Low Interest Rates**

**0.5%** - Bank of  
England



**+4%**

**Increase in  
Outbound  
European Travel**



**+2.4%**

**GDP Annual  
Growth  
Rate**



# 2018 Market Conditions – UK

**5%**

UK average  
unemployment  
rate



**1.4%**

Forecast UK GDP  
Growth

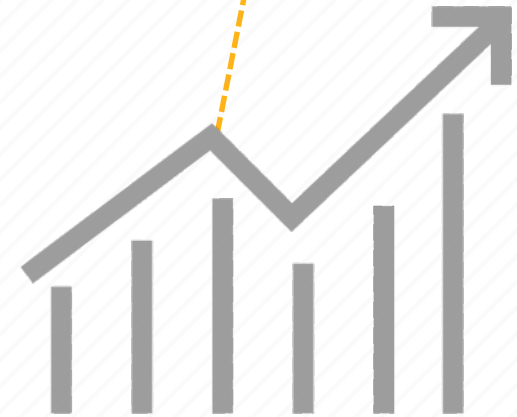
**2.7%**

UK Inflation rate



**1.1%**

2018 Predicted Consumer  
Spending Growth

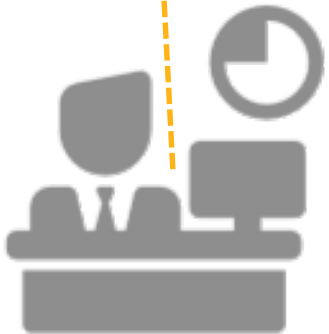


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# 2018 Market Conditions – Germany

**3.6%**

Germany-  
Average  
unemployment rate



**2.3%**

Forecast DE GDP Growth

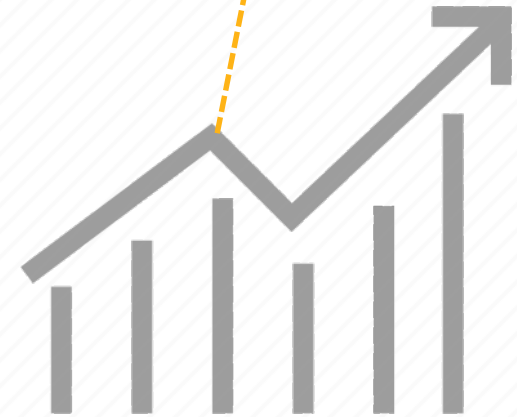
**1.57%**

DE Inflation rate



**2.4%**

2018 Predicted  
Consumer  
Spending Growth



# Europe is the World's Largest Source Region For Outbound Tourism

**40.4%**

Market share  
European  
Visitors to USA

**12,085,000**

Europe to USA visitor arrivals

**139,780**

Europe to Hawaii visitor  
arrivals

Europe's top source markets to the USA  
(2016)

UK	4.57 million
Germany	2.03 million
France	1.63 million
Scandinavia*	1.3 million



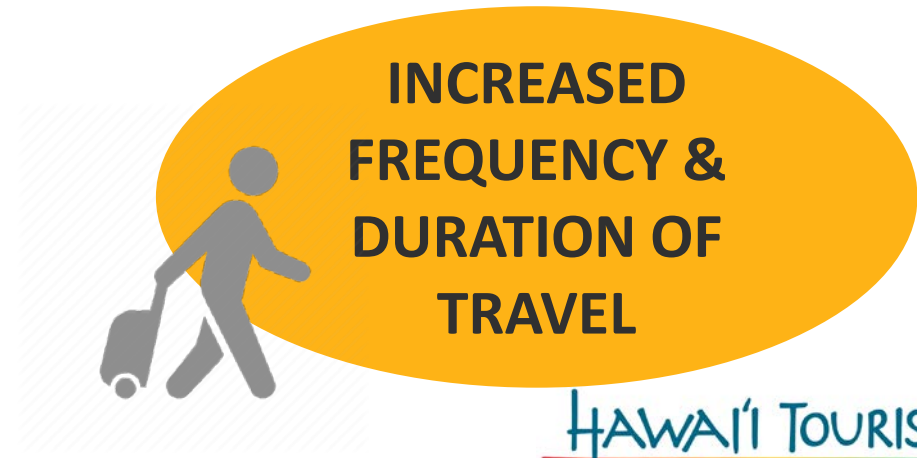
# 2018 European Competitor Price Comparison



# 2018 Visitor Forecast

	2016	2017	2018	% Change
Visitor Expenditures (\$ millions)	\$353.4	\$290.3	<b>\$308.7</b>	<b>+6.3%</b>
Per Person Per Day Spending	\$189.9	\$158.6	<b>\$167.9</b>	<b>+5.9%</b>
Arrivals	143,922	139,780	<b>139,780</b>	<b>+0.0%</b>

# 2018 European Consumer Trends





# AIRLIFT UPDATES

# Airlift – Accessibility from Europe





# 2017 HIGHLIGHTS



# Hawaii Tourism Europe - 2017 Highlights

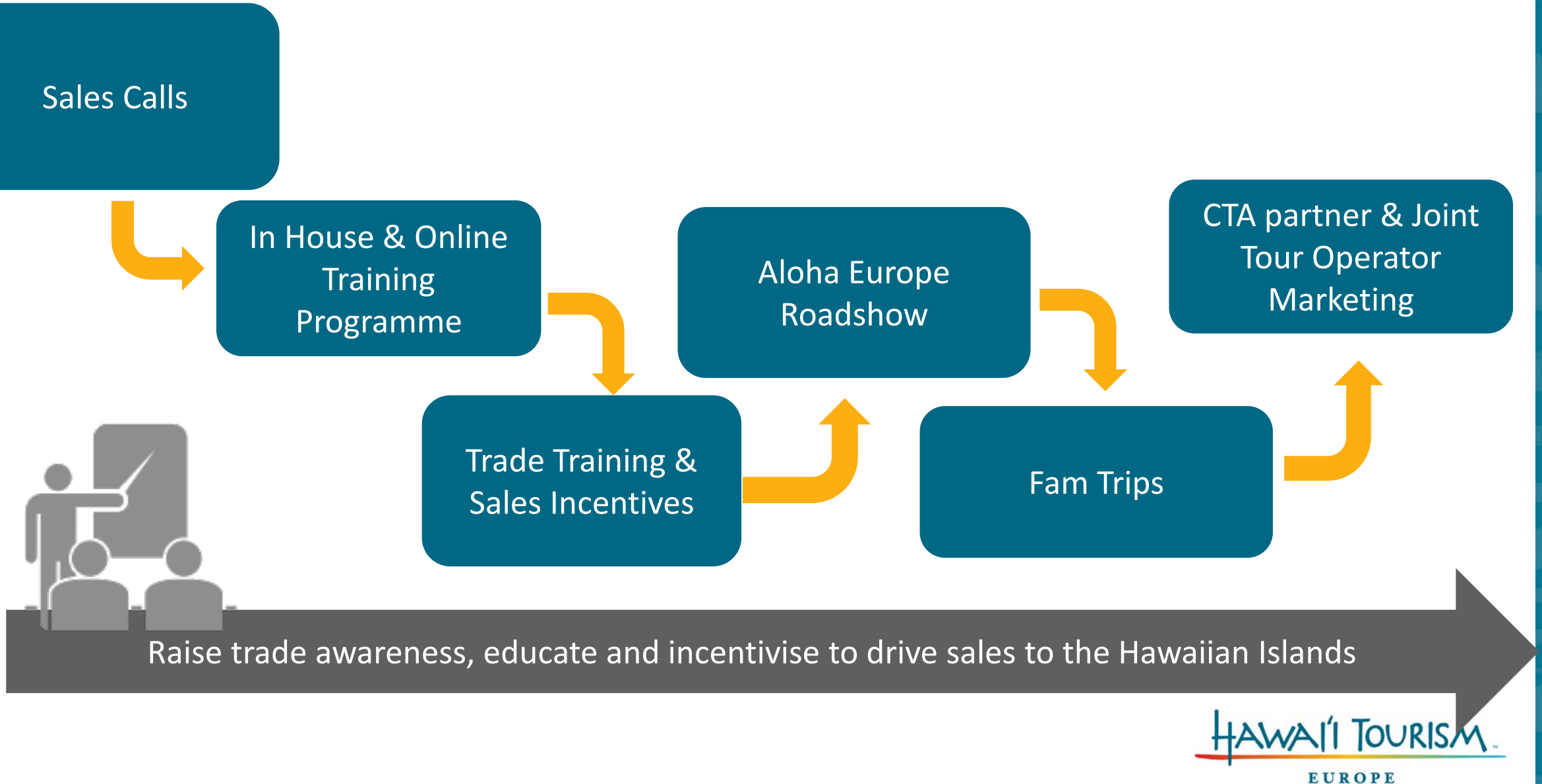


# MARKET OPPORTUNITIES & STRATEGIC FOCUS



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# Trade Strategy





# Trade Strategy


Hawai'i Tourism Europe														
TAMs Segmentation Matrix														
									Trained agents / Completed online training					
Criteria:	Volume of room nights		Av. length of stay		Product		Average pax Spend				No. of islands featured		Notes:	
Rating 1 out of 5	0-300		Less than 7 nights		0-10 properties		<£500		<10%		1 island			
Rating 2 out of 5	300-1000		7-10 nights		10-20 properties		>£1000		11-20%		2 islands			
Rating 3 out of 5	1000-2500		10-14 nights		20-30 properties		>£2000		21-40%		3 islands			
Rating 4 out of 5	2500-3500		14 - 18 nights		30-45 properties		>£3000		41-65%		4 islands			
Rating 5 out of 5	3500+		18 + nights		45+		>£4000		> 66%		5 + islands			
Accounts	Rating	Weighting	Rating	Weighting	Rating	Weighting	Rating	Weighting	Rating	Weighting	Rating	Weighting	= 100%	Total Score out 5
SET WEIGHTINGS:		30%		20%		15%		10%		10%		15%	100%	
Tour Operator 1	2	30%	5	25%	3	25%	2	10%	1	10%	2		100%	2.9
Tour Operator 2	5	30%	3	25%	3	25%	5	10%	3	10%	4		100%	3.8

# Consumer Focus



4,857,029

Size of the targetable Hawai'i Engager Data Pool in Europe



The Hawai'i engager pool are the consumers that are engaging with our campaigns across Europe. These are audiences who we can reach again and again with new messaging for forthcoming campaigns, therefore **building a sustainable tourism strategy for the future.**



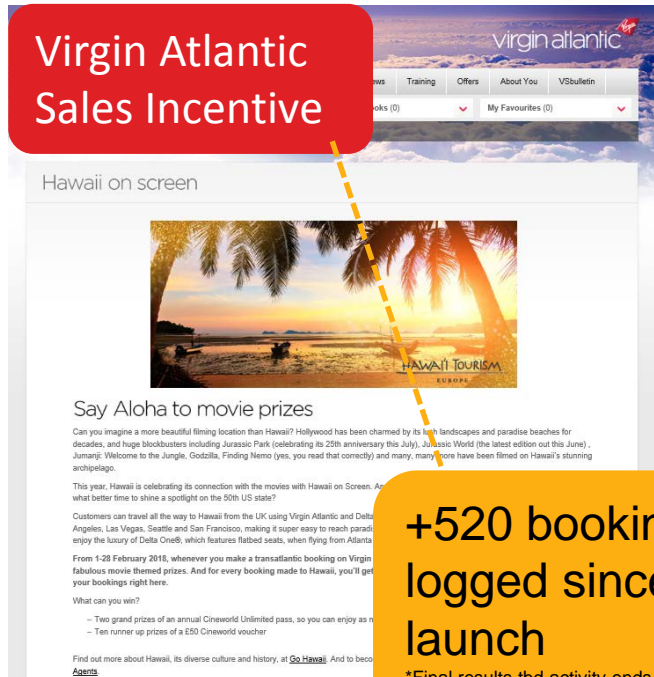
2018's campaigns will have the considerable advantage of being able to capitalise on the constantly growing data pool developed in our 2017 campaigns. Allowing us to continuously retarget those interested in visiting Hawai'i converting them into passengers.

# 2018 KEY ACTIVITIES



# Hawai'i On Screen – Year Round Activity

## Virgin Atlantic Sales Incentive



+520 bookings  
logged since  
launch

\*Final results tbd activity ends 1<sup>st</sup>  
March

## Hawai'i On Screen Press Trip



## Regular social media updates



Media & Trade Premier  
Screening event with Universal  
Jurassic World: Fallen Kingdom

Develop Hawai'i On Screen  
itineraries to support promotion  
of the Hawaiian Islands and the  
overall theme of Hawai'i on  
Screen

Joint Tour Operator Marketing





# Brand USA Campaign: January – April 2018



Lightbox Content Hub  
activity Targeting Premium  
News and Travel  
Environments

Data Targeting of ABC1  
travellers of users who have  
recently viewed long haul,  
USA and competitor  
destination content online

Bon Voyage -  
“Hawai‘i was our top selling  
state in January”

1,554,156 Campaign Reach

3,108,311 Impressions

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# Lonely Planet Campaign: February – April 2018

Sei es die Kultur, die inzwischen ein bunter Mix aus asiatischen, US-amerikanischen und polynesischen Einflüssen ist, oder die Geologie, die auf heißer Lava und Vulkangestein basiert, der kühlende Pazifische Ozean oder die bunte und eigentümliche Pflanzenwelt: Umrahmt von sommerlichen Temperaturen und freundlichen Menschen, die ihre Heimat verehren, ist Hawaii eine wahre Wonne.

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## Wie wird Hawaii für dich zum Paradies?



Surfbretter auf Maui © Hawaii Tourism Authority (HTA) / Blake Bronstad



Created dedicated microsite with heavy focus on culture & outdoors

Answer 5 questions on holiday habits to create tailor-made itinerary through FTI Touristik based on interests

Competition element to WIN a trip to Hawai'i

2 million impressions

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# Experience Our Aloha (UK & Germany) – Sept – Nov 2018

**Lightbox Hub – The EOA**  
Lightbox hub will have a tab for each Pillar including a video carousel and features

**Content and Video -**  
bringing to life 4 key pillar experiences through Aloha Ambassadors

**Experience Our Aloha Competition**  
- Select your favorite Aloha Ambassador story and enter a prize draw to WIN a trip to Hawai'i

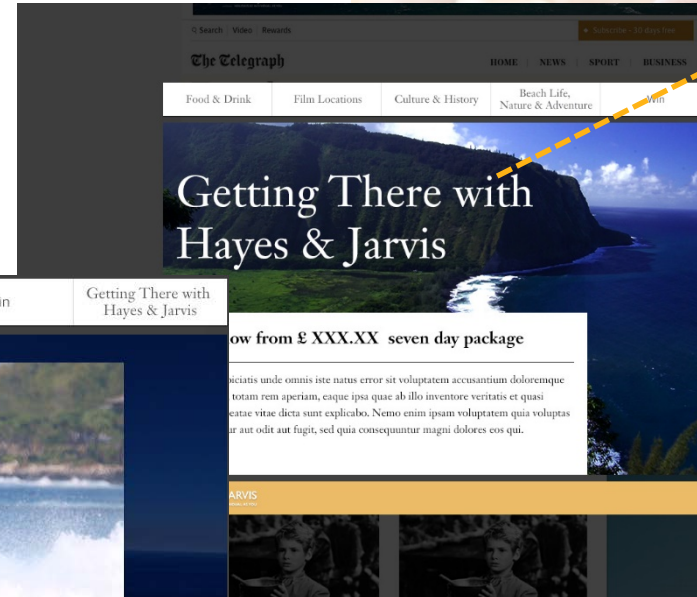
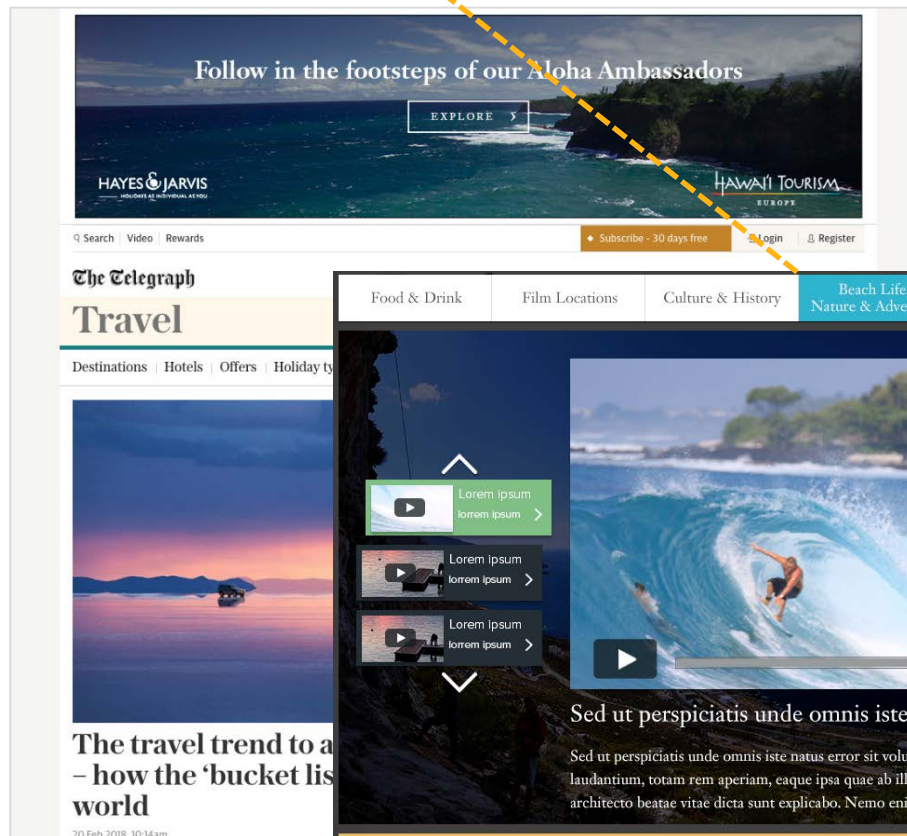
**Tactical display advertising and social advertising for TO CTA**

**UNITED KINGDOM**  
Campaign Reach: 3,555,909

Impressions: 6,130,877

**GERMANY**  
Campaign Reach: 3,706,838

Impressions: 5,560,256



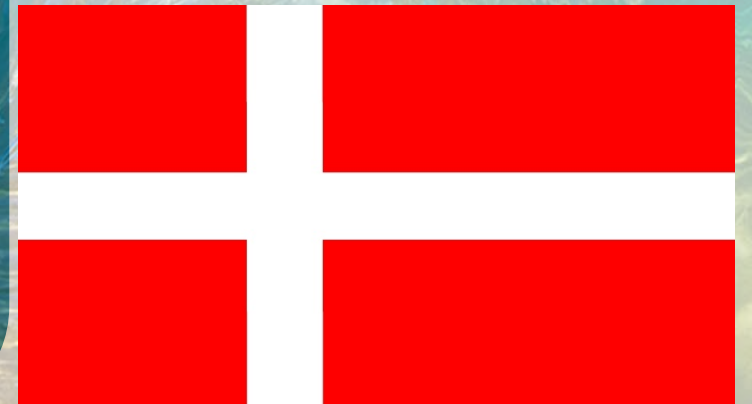
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## 2018 ALOHA EUROPE - OCTOBER 7th – 19th



### ALOHA EUROPE ROADSHOW

- 10-12 Partners
- 2 week Roadshow across Europe's top source markets
- +650 Opportunities to engage with Product Manager and Sales Agents from key European TO's
- +40 Media meetings





# OVERVIEW ON MICE MARKET

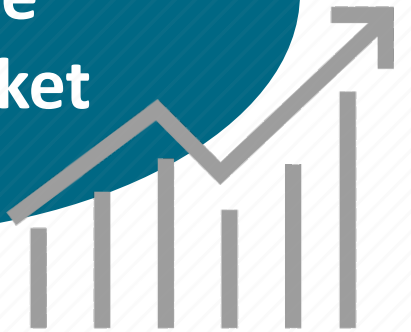


# Opportunities for MCI Business from Europe

**Further research  
into International  
Associations**



**Increase focus  
towards the  
Spanish market**



**Closer working  
relationship with  
AlohaConnects and  
Elele team**



# Hurdles for future business focusing on years 2019 & 2020

Unsettled exchange rates



New German compliance law

Value Destinations increased presence



US Travel Ban



# 2018 Upcoming Activities



**IMEX**

**15<sup>th</sup>-17<sup>th</sup> May  
2018**

**4,900  
Trade  
Exhibitors**

**3,942  
Hosted  
Buyers**

**Experience Aloha  
Business Exchange**

**10 MCI  
Agencies**

**June  
2018**





# MAHALO NUI LOA A HUI HOU

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