



2018  
**GLOBAL  
TOURISM  
SUMMIT**

HAWAII TOURISM  
AUTHORITY

*Charting the  
Course*

#GTSHAWAII



**OCTOBER 1-3**  
HONOLULU, HAWAII



# *2019 Market Outlook & Activities: Europe*

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# *Introduction*

## *Hawai'i Tourism Europe*



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# Hawai'i Tourism Europe Team



Amanda Hills  
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Jonathan Sloan  
MD



Niamh Walsh  
HTE Sales & marketing  
account director



Mathu Premaruban  
HTE Senior PR director



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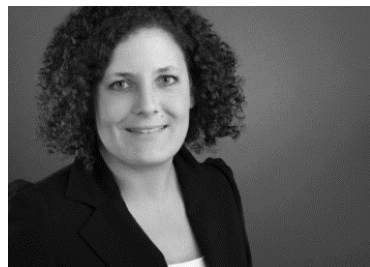


# Hawai'i Tourism Europe Team

## Germany



Ralf Lieb  
MD



Sabrina Hasenbein  
PR manager  
Germany & Switzerland



Katharina Dorr  
Sales & marketing manager  
Germany & Switzerland

## France



Annabelle Michaux  
Account director



Manon Grant  
France Account manager



# *Session overview*

- ◆ 2018 Market Activities Recap 2019 Brand Management Plan overview  
Economic/Political Environment
  - Market Trends
  - Strategic Objectives
  - Target Segments
  - Key Leisure Programs
  - Key MCI Programs
- ◆ Q&A



# *2018 Market Activities Recap*



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# *2019 Brand Marketing Plan Overview*



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

40.4%

Market share Europe to USA

12,085,000

Europe to USA visitor arrivals

139,780

Europe to Hawai'i in 2017

**August YTD**

+5% to 96,627

+ 12.4% in spend  
to \$22.3 million



# *European economic climate*

- ◆ Currency strengthened against USD since 2016
  - £1 GBP = \$1.30 USD
  - €1 EUR = \$1.20 USD
- ◆ Low Interest Rates
  - 0% - European Central Bank
  - 0.5% - Bank of England
- ◆ Low Unemployment Rate
  - 4%
- ◆ Increase in Outbound European Travel
  - +5.5%



## *What are the market trends affecting travel?*

- ◆ Uplift in low-cost flights
- ◆ Experience economy
- ◆ Appetite for new destinations
- ◆ Responsible tourism
- ◆ A continued rise in multi-centre bookings



# Low cost carriers

# 29%

Rise in the amount of long-haul trips booked by European travelers since 2016



# Experience economy

72%

Millennials spend experiences rather than possessions



# Alternative destinations

# 1 in 3

Would like to visit a new destination in the next year



# Demand for multi-center

# 60%

Of travelers to the west coast are combining two or more destinations





# Responsible tourism

# 70%

Europeans want to give back to communities they travel in



## *What are the key booking trends?*

- ◆ Booking trends UK
- ◆ Booking trends Germany
- ◆ The Europe opportunity



# Market profile - UK



- ◆ 4.57 million visitors to US
- ◆ \$16 billion spend in US
- ◆ 80% are repeat visitors
- ◆ Book 5-12 months prior
- ◆ 32% Traditional operators
- ◆ 44% Online
- ◆ 16% Mobile

# Market profile – Germany

- ◆ 2.3 million visitors to US
- ◆ \$8 billion spend
- ◆ 81% are repeat visitors to US
- ◆ Book 10-12 months prior
- ◆ 38% book with travel agency
- ◆ Remainder booking through travel company online

# *The Europe Opportunity*

Europe has a 40.4% share in the total overseas visitors to US

European travellers are looking for authentic / immersive experiences

Longer holidays (4-6 weeks) and high disposable income

Safety & Security are extremely important, Hawai'i is considered very safe

Spending has significantly increased due to very low to no interest rates

Europeans stay longer (average of 19.1 days)



## *What is the future of digital?*

- ◆ The importance of video
- ◆ Personalization and self personalization
- ◆ Tailored content



Video content

80%

Of all internet traffic will be video by 2019



It must be  
authentic and personal





Personalized messages are now the expectation

40%

Of online travel buyers expect a personalized experience



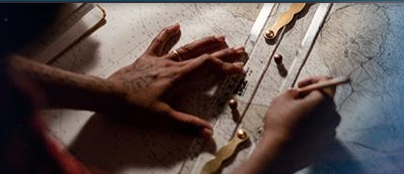
# Tailored content

6 in 10

travelers believe brands should tailor their experience based on personal preferences and past behaviors



Right person  
Right moment  
Right context



# *Strategic Objectives*



Attract a greater share of European **higher value visitors** and **maximise length of stay** and visitation year-round.

• Our Kuleana - preserve the values and interests of the local community



## *Our 2019 objectives*

- ◆ Increase awareness amongst high spending consumers both direct and through trade
- ◆ Increase length of stay and spend
- ◆ Increase engagement and visitation



# Our 2019 strategy

- ◆ Increase awareness
  - Engage in Brand USA week
  - High visibility consumer campaign
  - Brand partnerships to reach new audiences
  - Actively pitch to media, influencers - bespoke inspiring stories
  - Amplify visual content through social and UGC
- ◆ Increase length of stay and spend
  - Educate trade on diversity of the islands to develop product
  - Trade and consumer campaign to encourage multi island visitation
  - Amplify multi island messages through media and social
  - Target high spenders (Av. household income +\$110,00)
- ◆ Increase engagement and visitation
  - Multi channel approach; trade, media, social, online, direct to consumer
  - Engage with repeat visitors to US looking for new destination
  - Active engagement of influencers with qualified content
  - Retarget Hawai'i engagers and covert bookings



Inspire



Educate



Convert



Capture

# *Target Segments*





# Target segments

## WANDER LUSTERS

Travelers looking for 'new' destinations and new experiences. Core need is to escape the daily grind and explore somewhere exciting and different

- DINKs, GEN X & Y (aged 25-50)
- High earner but seek value for money
- Prioritise experiences rather than things
- Box tickers – multi center
- Digital savvy

## AUTHENTIC IMMERSERS

Conscientious travelers, nature lovers, seeking cultural immersion and local interaction. Core need is to gain fresh perspectives about people, places and planet

- Active senior / Gen S (+50)
- High disposable income
- Lots of time to travel
- Group, FIT
- Safety is key

## EXCLUSIVITY THRIVERS

Core need is to relax and re-energise through high-end sophisticated activities - beach, water, sea, gastronomy, exclusive local and cultural experiences

- High Net worth, world traveler (+45)
- Generation Silver Luxury Seekers
- Influencer
- Lots of time to travel
- Multi generational



# *2019 Key Leisure Programs*



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# Hawai'i Senses - Consumer campaign

A fully integrated campaign concept that engages high value travellers, bringing the Hawaiian Islands to life through sensory, immersive experiences and visual content

IMMERSIVE CONSUMER  
ACTIVATION

VIDEO AMPLIFICATION

MEDIA PARTNERSHIPS

BRAND PARTNERSHIP WITH  
LEADING BRANDS

The image shows a composite of digital content. At the top left, a woman is wearing a VR headset, with a red play button icon overlaid on her hand. To her right is a banner for 'HAWAII Raise your senses' with a scenic view of a beach and mountains, and a 'HAWAII TOURISM EUROPE' logo. Below this is a navigation bar with 'Home', 'My Feed', and 'Saved' options. A search bar contains 'Search | Video | Rewards' and a 'Subscribe - 30 days free' button. The main content area features 'The Telegraph' logo and a 'Travel' section with a menu of 'HOME | NEWS | SPORT | BUSINESS | ALL SECTIONS'. Below the menu is a list of categories: 'Destinations | Hotels | Offers | Holiday types | City | Beach | Tours | Cruise | Ski | Family | Advice | LuxuryMore'. The bottom section displays two promotional images: one of a sunset over a rocky coastline with silhouettes of people, and another for 'Festive Breaks' with a winter scene and a 'CLICK HERE TO DISCOVER MORE' button.

AMPLIFICATION WITH TOUR  
OPERATOR PARTNERS

COMPETITION TO ENGAGE  
AUDIENCES

SALES DRIVING TACTICAL  
DATA TARGETING

SOCIAL AMPLIFICATION



## 2019 Trade activity

Raise trade awareness to drive sales to the Hawaiian Islands



# Brand USA Travel week - September 9-12, 2019

## BRAND USA TRAVEL EXPO

- Appointment-driven business sessions
- 60/40 exhibitor to buyer ratio

## ENRICHMENT & EDUCATION

- Inspirational speakers
- Innovative hosted events
- Educational seminar program

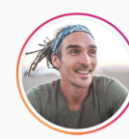
## CONSUMER ENGAGEMENT

- Consumer and media event - music, film, etc.



# 2019 PR Activity

- ◆ Media Trips:
  - Press trips and social influencer trips: Live the adventure
  - Group trips focusing on history, culture, adventure, luxury: UK, German and Swiss markets
- ◆ Story campaign ideas:
  - Luxury experiences
  - Sustainability
  - Family travel - immersive experiences for Gen X, Y & Z
- ◆ Events:
  - Raise your senses – Hawaiian Five Senses
- ◆ Target publications:
  - Suitcase Magazine, TANK Magazine, Traveller's World, Harvest Magazine



funforlouis [Follow](#)

2,029 posts 1.4m followers 707 following

Louis Cole

Travel vlogger sharing my adventures & hoping to inspire social change

Founder of @livetheadventure

#AlphaCollective

📧: louis@livetheadventure.club

📺: youtube.com/louis



# 2019 MCI Activity

- ◆ The Meetings Space 2019
  - 2 day forum in Q1 2019, predominately UK and German clients
- ◆ IMEX 2019
  - 21 - 23 May 2019
  - Expanding presence at the show with more Meet Hawai'i partners
- ◆ Association roadshow
  - A new activity to reach out to key PCO's in UK & Europe highlighting the association offering in Hawai'i (Aloha Connects), in partnership with the HCC
- ◆ Familiarization trip
  - Experience Aloha Business Exchange 2019
- ◆ FESTPAC 2020



# Questions?

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