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Charting the Course

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OCTOBER 1-3 HONOLULU, HAWAI'I

# Hawaiʻi Tourism Taiwan 2018 Recap & 2019 BMP

#### **Andrew Koh**

Managing Director Hawai'i Tourism Taiwan andrewkoh@hawaiitourism.com.tw



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# Hawai'i Tourism Taiwan

Managing

Director

**Andrew Koh** 

2018

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# Session overview

- 2018 Year-to-date market activities recap
- 2019 Brand management plan overview

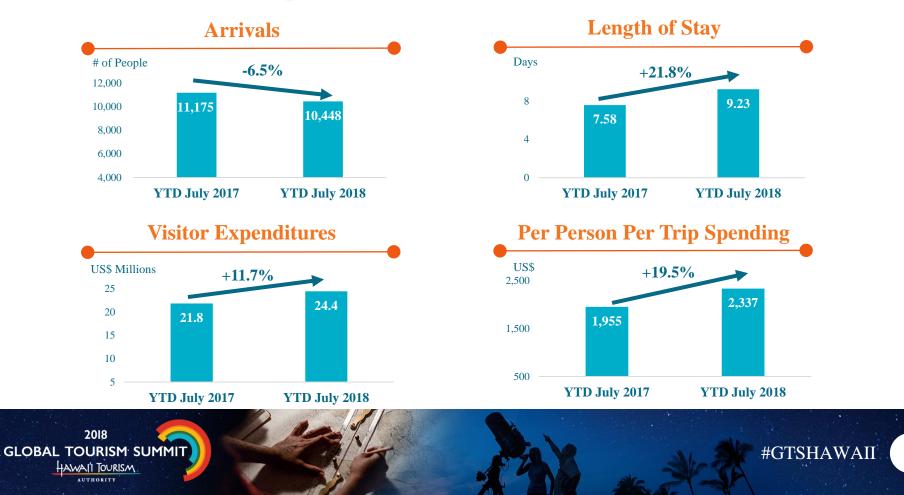
• Q&A



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# 2018 Year-to-date recap – Taiwan Outbound to Hawai'i Statistics



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2018 Year-to-date recap – Market Activities

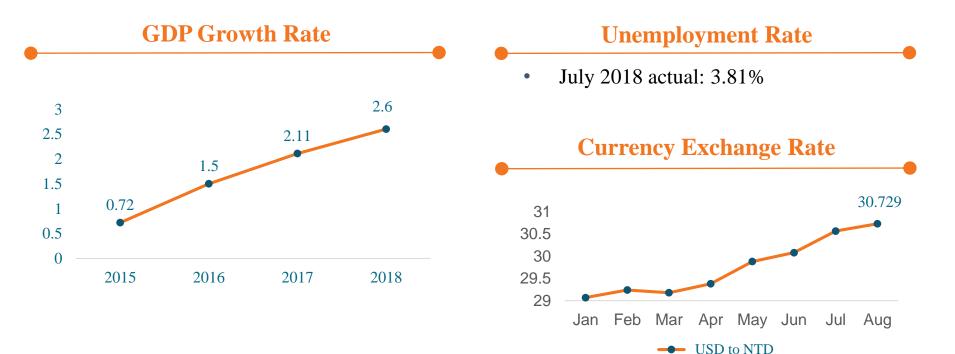


# 2019 Brand management plan overview

- Economic environment
- Market trends
- Strategic objectives
- Target segments
- Key leisure programs



# **Economic environment**

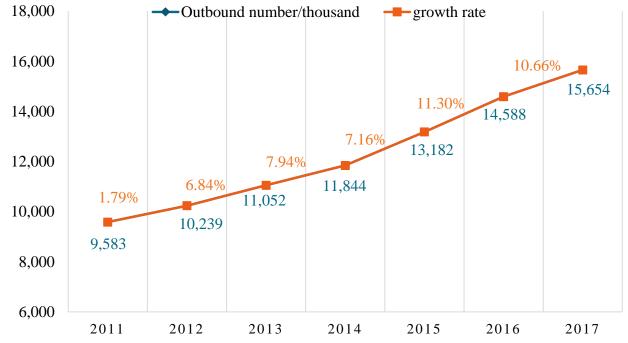


Source: Directorate General of Budget, Accounting and Statistics, Executive Yuan; Taiwan Tourism Bureau, Source: Central Bank of Taiwan



## Market trends – Taiwan outbound market overview

#### **OUTBOUND DEPARTURES OF TAIWAN**



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Source: Taiwan Tourism Bureau



# Market trends – Taiwan travel outbound market overview

• Taiwan outbound statistics by destination

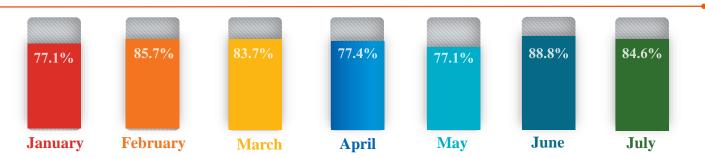
Rank	Competitors for Taiwan MMA	Jan-Jul 2018	Jan-Jul 2017	YOY Change +-%
1	Australia	120,070	95,109	+26.24 %
2	Europe	322,420	283,623	+13.68 %
3	Japan	2,993,774	2,770,514	+8.06%
4	USA	348,604	342,273	+1.85%

Source: Taiwan Tourism Bureau



# Market trends – Airlift

#### **Total Load Factor 2018**



#### **China Airlines**

- New A350 starting November 2017
- Seat inventory:
  - a) Total seats: 5,508
  - b) Increased 30 seats per flight; total of 306 pax per flight
  - c) 2 flights per week (Wed. & Sun.)
- Fuel surcharge: US\$170

#### **Competing New Routes**

- China Airlines: Taoyuan to Ontario, CA (US) in March
- Air France: Taoyuan to Charles de Gaulle in April
- Mandarin Airlines: Taichung to Tokyo in June
- **Tigerair**: Taoyuan to Saga & Kaohsiung to Nagoya in July

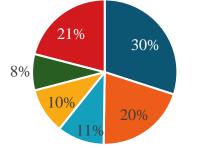


# Market trends – Taiwan overall outbound statistics

Outbound Travel S	Outbound Travel Stats	
Average trips	0.62 trips	
Average stay	8.05 nights	
FIT vs. GIT	68.7% / 31.3%	

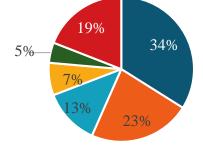
Demographics	
Gender	Male 50.2%; female 49.8%
Median age	42 years old
Average salary	US\$21,500/year

#### **Factors Impacting Outbound Travel Intentions**



- More Vacation DaysInvites from Family/Friends
- Higher Travel Budget
- Attaractive GIT Activities

#### **Decision Making on Outbound Destinations**



- Invites From Family/FriendsTo Get Away & Relax
- To Experience Other CulturesLow Travel Fares



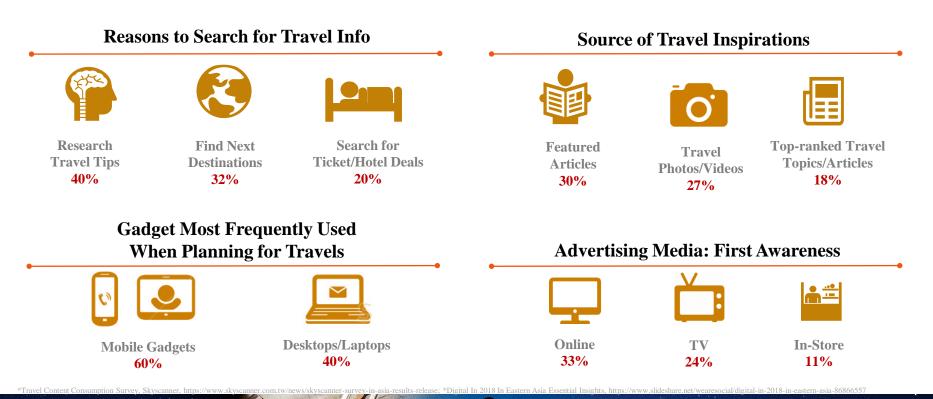
# Market trends – Taiwan to Hawai'i outbound statistics

Outbound Travel Stats		
FIT vs. group	80% vs. 20%	
First timers vs. repeater	71% vs. 29%	
Average party size	2.1 people	

Island Distribution (Unit: visitors)		
Oʻahu	18,007	
Island of Hawaiʻi	5,018	
Maui County	2,778	
Kauaʻi	983	



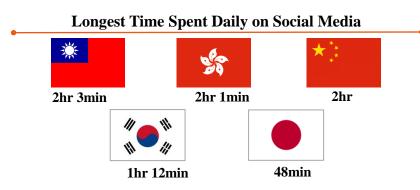
# Market trends – Travel content & media consumption



2018 GLOBAL TOURISM SUMMIT



# Market trends – Social media insights



#### Video is the Mainstream Format

FB Fan Page – User Engagement %		
Posts with videos	8.12%	
Attached links	5.71%	
Posts with photos	5.59%	
Total Average	5.82%	

# Facebook Dominates in Penetration Facebook 77% YouTube 75% LINE 71% Facebook Messenger 48% Instagram 35%

#### **Opportunities for Other Platforms**



- Access to niche segments
- IGTV enables users to livestream content

### 🕨 YouTube

- Avg. 14.6 hrs spent watching content (YoY 41%)
- 21% users will YouTube to search for brands, products or service info
- 53% users will actively share the videos they like





# Market trends – Industry insights

- Overall outbound travel is expected to grow steadily
  - International outbound leisure travel trips grow by an average of 5.1% per year by 2020
  - Increased airlift, new routes and visa waiver program/global entry (the US)
- Focus on themed and in-depth travel products
  - What's hot:



Health & wellness

Vineyards and wine tasting



Michelin-starred gourmet tours

\*Mastercard, The Future Of Outbound Travel In Asia/Pacific 2014-2020; Asia Pacific Digital Traveler Research, Criteo & Euromonitor International, April 28th, 2017; Digital Times, February 1st, 2016; Xin Media, Outbound Travel Is Trending Up in Taiwan, March 19th, 2018.

Music festivals



# Strategic objectives





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# Target segments

Marketing Pillars	Target Segments	Demographics/Characteristics
Education / Culture	<ul> <li>Culture &amp; history aficionados</li> <li>Families with children</li> <li>Eco-tourism travelers</li> </ul>	Males and females age 25 to 60 who are passionate about cultural/historical scenes and who care about preserving the ecosystems and heritage of the destination
Romance / Luxury	<ul><li>Romance seekers</li><li>Honeymoon goers</li></ul>	Males and females age 30 to 50 who seek romantic, premium and pampering experiences for an intimate getaway
Relaxation / Premium	<ul><li>Lifestyle travelers</li><li>Active mature travelers</li></ul>	Males and females age 40 to 65 who value the quality of travel and integrate relaxing experiences into their vacation
Health & Wellness	<ul> <li>Fitness enthusiasts</li> <li>Special interest travelers</li> <li>Affluent FIT travelers</li> </ul>	Female age 25 to 45 who are into wellness and fitness; who seek to incorporate relevant programs into trips
Outdoor / Premium	<ul> <li>Outdoor adventurers</li> <li>Nature lovers</li> <li>Affluent FIT travelers</li> </ul>	Males and females age 25 to 45 who enjoy outdoor activities and adventures; natural wonders are a big must when choosing a destination

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# *Key leisure programs 1 – Consumer promotion – Movie theater co-op programs*

- Time: June/July/August
- Plan:
  - To increase exposure among age 20-40's with latest film releases
  - Potential opportunities:





VIESHOW Gold Class

• KPI: Reach 800,000 viewers; media exposure estimated at US\$600K

\*IMDb, https://www.imdb.com/title/tt2527338/



# Key leisure program 2 – Consumer promotion – Yoga with Aloha: Facebook challenge

- Time: January/February
- Plan:
  - Increase reach and interactions through user-generated content
  - Partner with one of the leading fitness and wellness groups in Taiwan
- KPI:
  - Recruit 30 participants; generate 100 posts (including articles, photos or video); media exposure estimated at US\$300K



\*Photo credit: Yogaloha Studio, https://www.instagram.com/yogaloha Hawai'i/?hl=er











# Key leisure program 3 – Consumer promotion – Hawaiʻi Aloha Festival

- Time: May/June or September/October
- Plan:



Cultural activities



Hawai'i brands, vendors and artists



High-end premium consumers

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• KPI: Media exposure estimated at US\$1.2 million





# *Key leisure program 4 – Consumer promotion – Co-op with fashion media*

- Time: April/May
- Plan:
  - Leverage Fashion media's TA and exposure to position Hawai'i as an upscale and trendy destination
  - E.g. Vogue, ELLE, marie claire, Harper's Bazaar, COSMOPOLITAN, GQ
- KPI: Recruit 4 fashion media outlets; generate 10-12 articles or posts; estimated reach of 3.5 million viewers; media exposure estimated at US\$3 million



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ELLE https://www.elle.com/tw/



# Key leisure program 5 – International Travel Fair (ITF)

- Time: November
- Plan:
  - Invite Hawai'i stakeholders, Island Chapters and local travel trade partners
  - Jointly host booths at the largest annual travel trade fair in Taiwan
- KPI: Recruit 4-6 agent participants; media exposure estimated at US\$500K





# Key leisure program 6 – Vlogger FAM

- Time: September
- Plan:
  - Carefully select top vloggers from different genres
  - Exposure on Facebook, Instagram, YouTube and blogs
- KPI: Recruit 4 vloggers and/or influencers; generate 12 posts (articles, photos or video); media exposure estimated at US\$600K



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# Key leisure program 7 – Travel agent FAM

- Time: September
- Plan:
  - Invite key agents in Taiwan to educate and assist them in product development and packaging.
  - Key agents will also attend the Global Tourism Summit
- KPI: 10 New Products





# Questions?

# **Andrew Koh**

Managing Director Hawai'i Tourism Taiwan andrewkoh@hawaiitourism.com.tw

## **Christina Chang**

Marketing Manager Hawaiʻi Tourism Taiwan hawaiitourismtaiwan@gmail.com



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