



SPRING TOURISM UPDATE

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OVERVIEW- MARKET CONDITIONS

Currency exchange

- GBP to USD: \$1.32
- Euro to USD: \$1.14



BREXIT 29th March

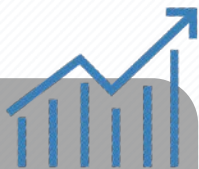
2019



GDP

UK: +1.5%

Germany: +1.1%



Tax rates

Income: 20% / 40%

VAT: 20%



Unemployment

UK: 4.5%

Germany: 4%



AIRLIFT

- Accessibility of the USA mainland from Europe has never looked better
- The growth of low cost, long haul airlines on trans-Atlantic routes means that there has never been a more affordable time to fly
- Flight connections from US gateway cities to the Hawaiian Islands continue to be improved reducing the need for long stopovers



ICELANDAIR



virgin atlantic



DELTA



norwegian



American Airlines



UNITED



BRITISH AIRWAYS



Southwest

COMPETITION AND BRANDING



- Destinations highlighted by tour operators as Hawai'i's main competitors

OUR STRATEGIC APPROACH



TARGET AUDIENCES

WANDER LUSTERS

Travelers looking for 'new' destinations and new experiences

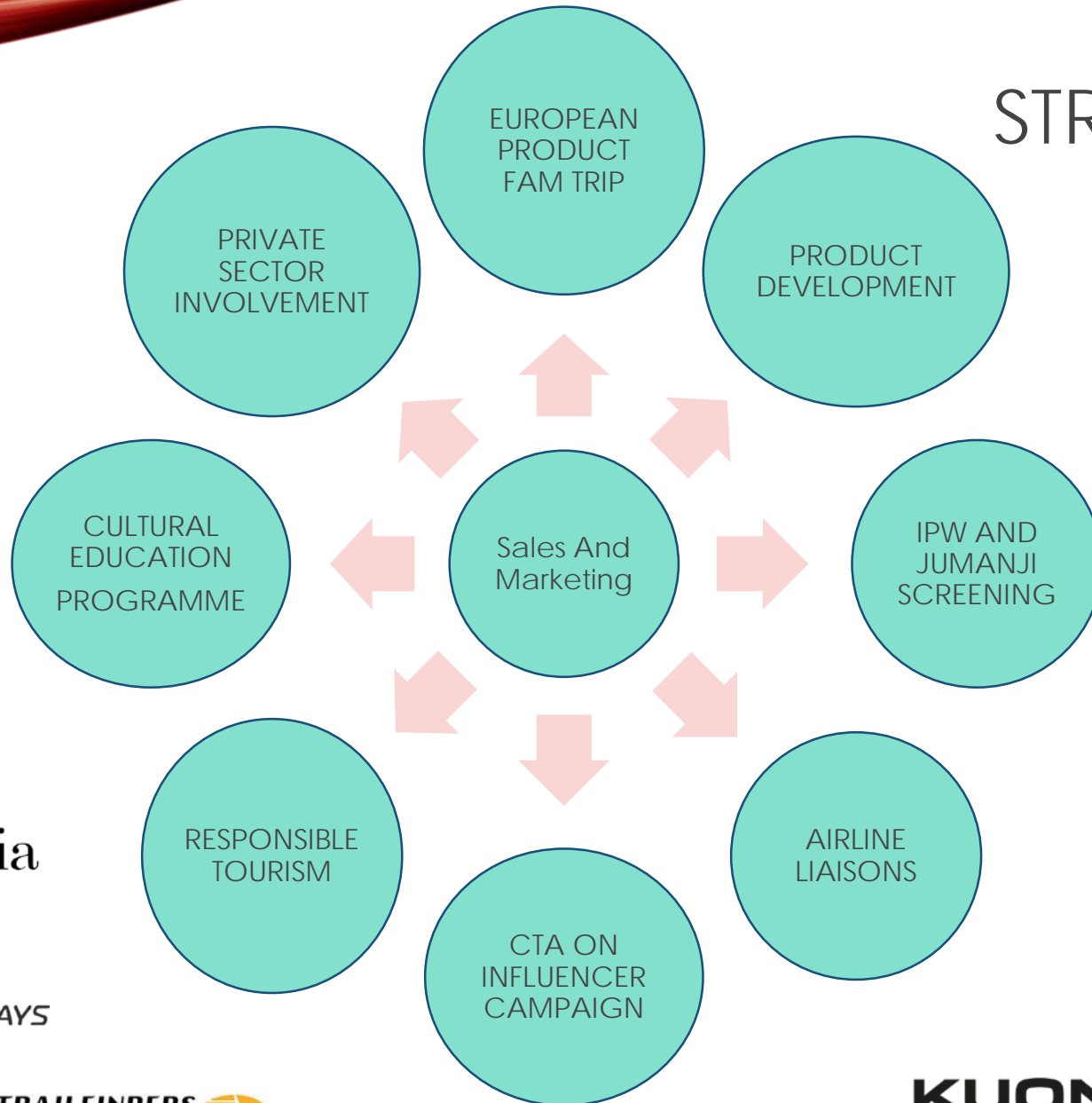
AUTHENTIC IMMERSERS

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

TRADE STRATEGY



**FLIGHT
CENTRE™**

Travelopia

Virgin HOLIDAYS

TRAILFINDERS
THE TRAVEL EXPERTS

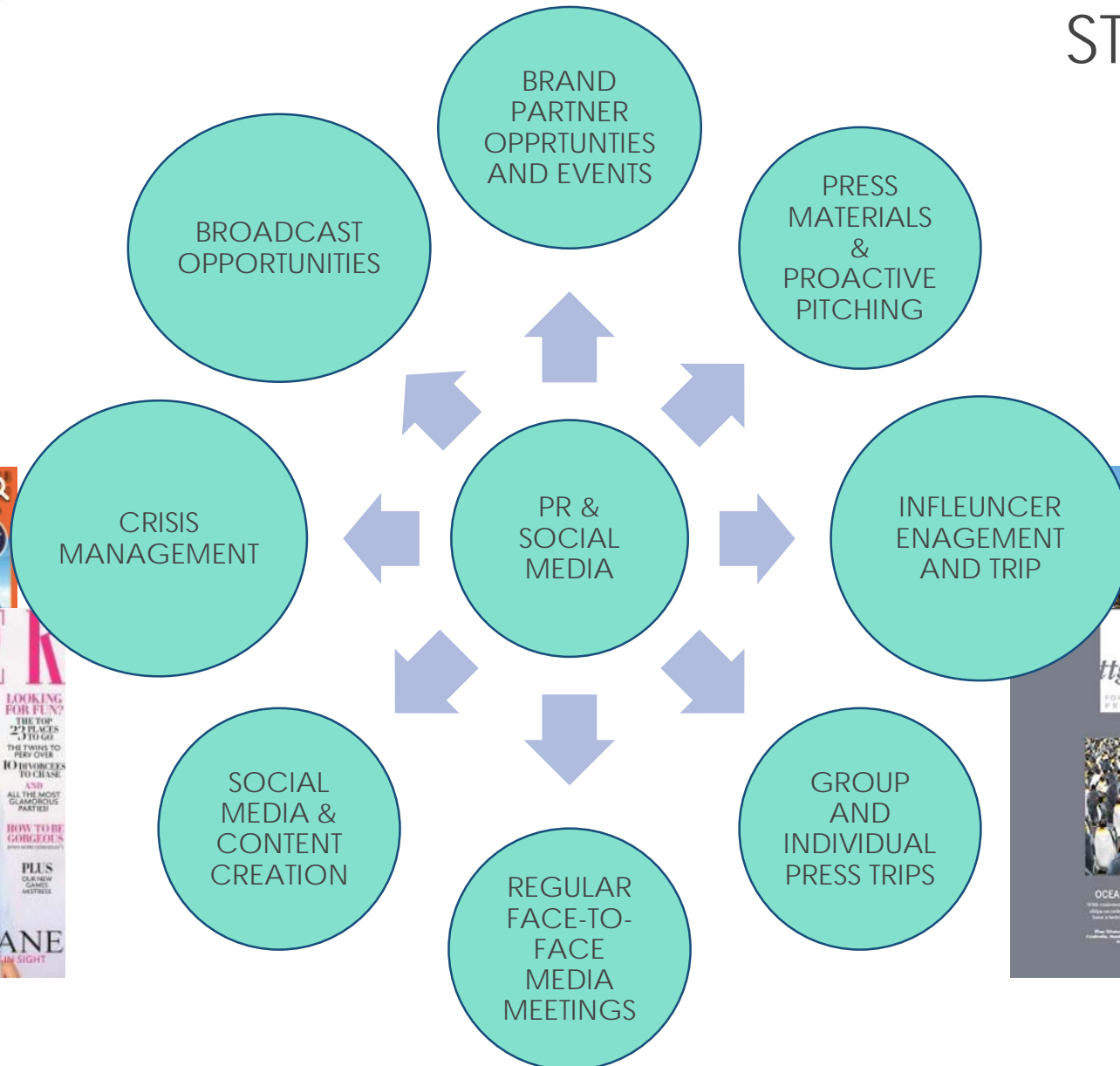
FTI
TOURISTIK

CANUSA
TOURISTIK SEIT 1983

D&R
Touristik

KUONI

PR & SOCIAL MEDIA STRATEGY



INFLUENCER CHALLENGE



Individual island experiences matched to followers interests

FOUR INFLUENCERS FROM THE UK & GERMANY

EACH INFLUENCER DOCUMENTS A DIFFERENT ISLAND EXPERIENCE

INFLUENCERS COME TOGETHER FOR **ISLAND OF HAWAI'I FINALE**

Call to action Tour Operator & Airline partners

Create captivating and authentic video content

VIDEO CREW WILL FILM THE JOURNEY AND CAPTURE THEIR EXPERIENCES

Highlight the best of the island experiences

Amplify reach through native advertising and contra marketing

Target high value traveller through media distribution



ISLAND OF HAWAI'I

Over a 3rd of all
Europeans visitor to
Hawai'i included
Island of Hawai'i

48.3k visitors
7.5% down vs 2017

Educate – safe and
diverse
Influence - Inspiring
and authentic video
content
Engage – past visitors
Drive visitation



RESPONSIBLE TOURISM

Our 2019 Mission

Attract a greater share of higher value visitors from the UK and Germany
and maximise length of stay and visitation year-round

In doing so, it is our kuleana to positively impact the Hawaiian islands by
preserving the values and interests of the local community



MAHALO NUI LOA