

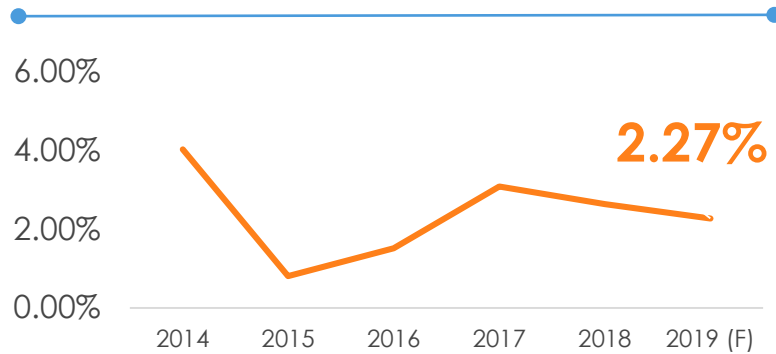


SPRING TOURISM UPDATE

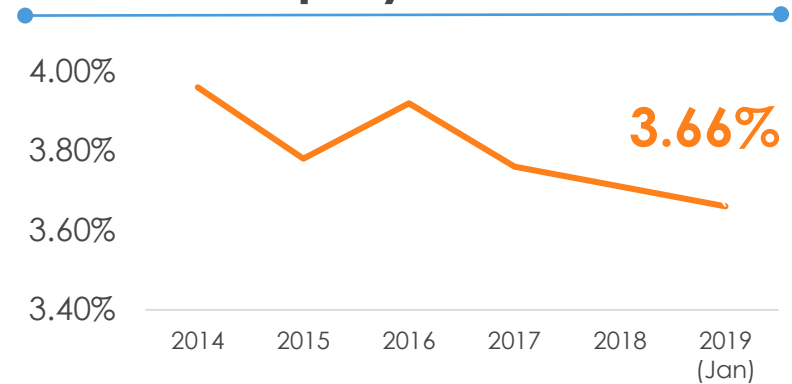
Andrew Koh
Managing Director

OVERVIEW- MARKET CONDITIONS

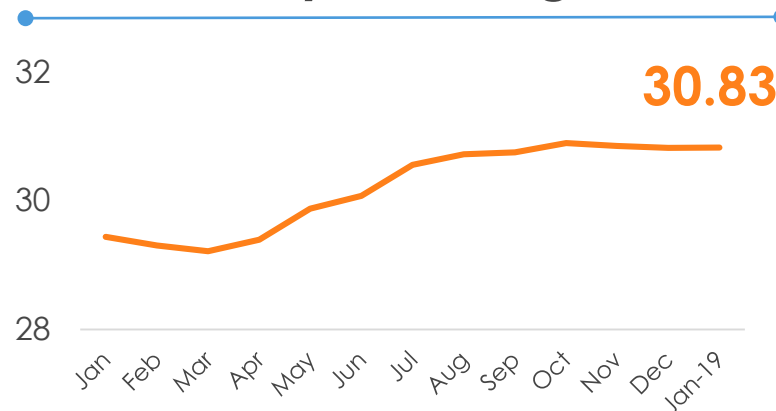
GDP Growth Rate



Unemployment Rate



Currency Exchange Rate



Domestic Policies

- New pension reform
- The New Southbound Policy

COMPETITION

- **Competitive landscape**

- New Zealand/Australia: Significant growths due to favorable currency exchange rates and increase in direct flights
- Europe: Frequent promotions on direct flight to European cities

Rank	Competitors for Taiwan MMA	Jan-Dec 2018	Jan-Dec 2017	YOY Change +/-%
1	New Zealand	20,901	6,846	+205.30 %
2	Australia	190,163	165,938	+14.60 %
3	Europe	537,777	496,529	+8.31 %
4	Japan	4,825,948	4,615,873	+4.55 %
5	USA	569,180	574,512	-0.93 %

BRANDING



Differentiation

Diverse offerings
in landscapes
and activities



Consumer

Increase brand
advocates via
social media
presence (WOM)

**Position Hawai'i as
a Prime Destination
for Exceptional
Experiences**



Upscale segments

Via co-op with top-tier
partners across
relevant industries



Travel trade

Develop themed PAK
products catered to
the affluent taste

AIRLIFT

China Airlines – Total Load Factor 2018

- The average load factor for 2018 closed at 79.1%
- Highest: June (88.8%); February (85.7%); July (84.6%)
- Lowest: November (67.9%); September (69.3%)

Competing New Routes

Oceania

Auckland

- Air New Zealand
- EVA Air

Europe

Paris

- Air France

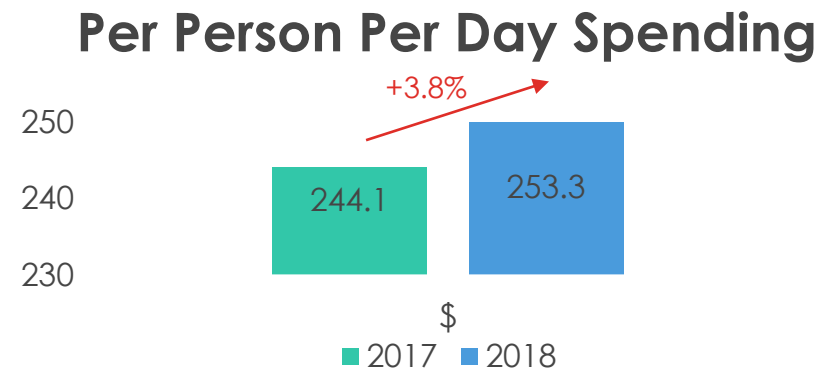
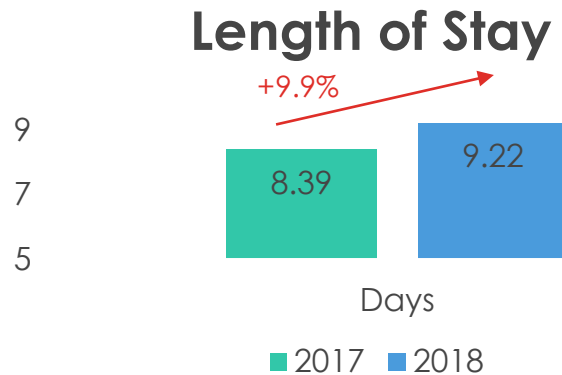
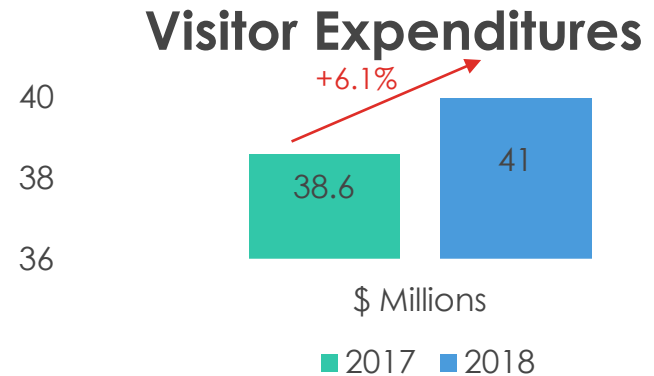
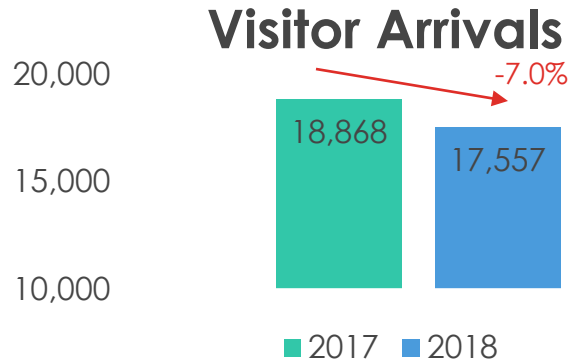
RESPONSIBLE TOURISM



- **Consumer:** Partner with leading media outlets (Marie Claire in Q1) to communicate Hawai'i's efforts on responsible tourism and showcase relevant eco-tourism attractions
- **Travel trade:** Develop informational collaterals/presentations to be used in monthly PAK meetings and trainings to promote responsible tourism to both agents and visitors

SHORT-TERM OPPORTUNITIES

Taiwan Outbound to Hawai'i Statistics (by air)



SHORT-TERM OPPORTUNITIES

Creative consumer initiatives

- Hawai'i Aloha Festival 2019 (travel trade will sell products on-site)
- Co-op with top-tier fashion media and influencers to strengthen Hawai'i's positioning
- Co-op with upscale movie theaters to reach its VIP members
- Hula flash mobs with Eslite Spectrum, the high-end bookstore and shopping mall to target its high-spending, sophisticated shoppers



HAWAI'I ISLAND

- Focus on developing content on HTT-owned social media platforms to educate local consumers that:
 1. it is safe to travel to the Island of Hawai'i
 2. Hawai'i Island offers unique visitor experiences
- Leverage the content from “Global Focus” to showcase the resilience and recovery progress on the Island of Hawai'i



MCI OPPORTUNITY

- Cathay Life Insurance: 4,500 pax in May 2019
- Rotary International: Attendance building in June 2020



HAWAII TOURISM

TAIWAN

夏威夷觀光局



Mahalo!