



# 2020 BMP - CHINA

Dennis Suo, CEO  
Alexander Wong, COO



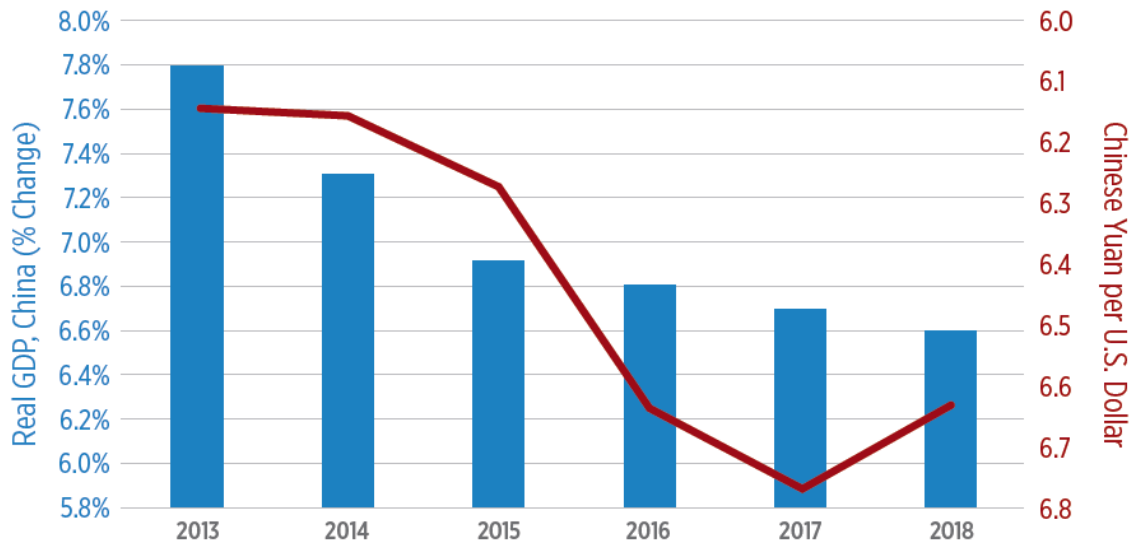
# MARKET CONDITIONS

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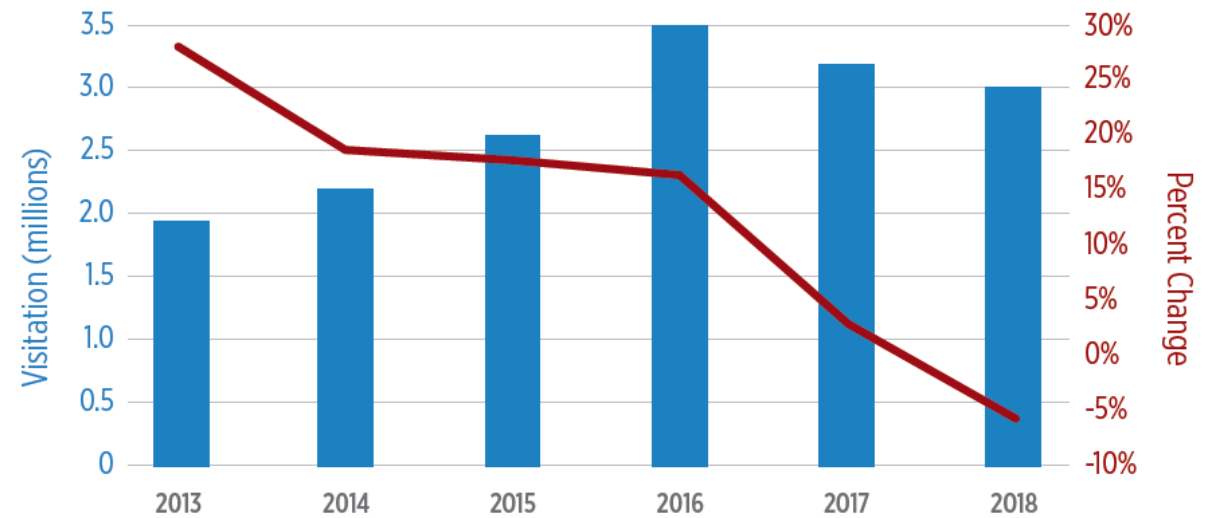
# MARKET CONDITIONS

### Chinese GDP and Currency, 2013-2018



Source: Oxford Economics

### Annual Chinese Visitation to the U.S., 2013-2018

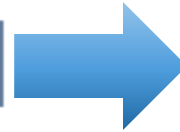


Source: U.S. Department of Commerce

# MARKET CONDITIONS

## TOP CHINESE LONG-HAUL DESTINATIONS AND SHARE OF LONG-HAUL TRAVEL FROM CHINA, 2015 AND 2018

DESTINATION	SHARE OF LONG-HAUL TRAVEL, 2015	SHARE OF LONG-HAUL TRAVEL, 2018	VISITATIONS, 2018 (IN MILLIONS)
1 United States	15.3%	12.9% ▼	3.0
2 France	12.8%	9.1% ▼	2.1
3 Russia	6.7%	9.0% ▲	2.1
4 Germany	8.1%	6.9% ▼	1.6
5 Australia	6.0%	6.2% ▲	1.4
<b>Total Long-Haul Travel</b>		<b>100%</b>	<b>23.1</b>



## CHINA MARKET SUMMARY, 2018

U.S. Visitations from China	3 million
Travel Spending	\$18.3 billion
Average Spending Per Visitor	\$6,950
Total U.S. Travel Exports	\$34.5 billion
U.S. Travel Trade Balance	\$29 billion

VWP Member	Free Trade Agreement	Global Entry	Preclearance	Open Skies
X	X	X	X	X

Source: Tourism Economics and U.S. Department of Commerce (for U.S. arrivals)

# MARKET CONDITIONS



International Trade Administration  
Industry and Analysis  
National Travel and Tourism Office

FAST FACTS:  
UNITED STATES TRAVEL AND  
TOURISM INDUSTRY  
—2018—

## International Visitors to the U.S. (2018)

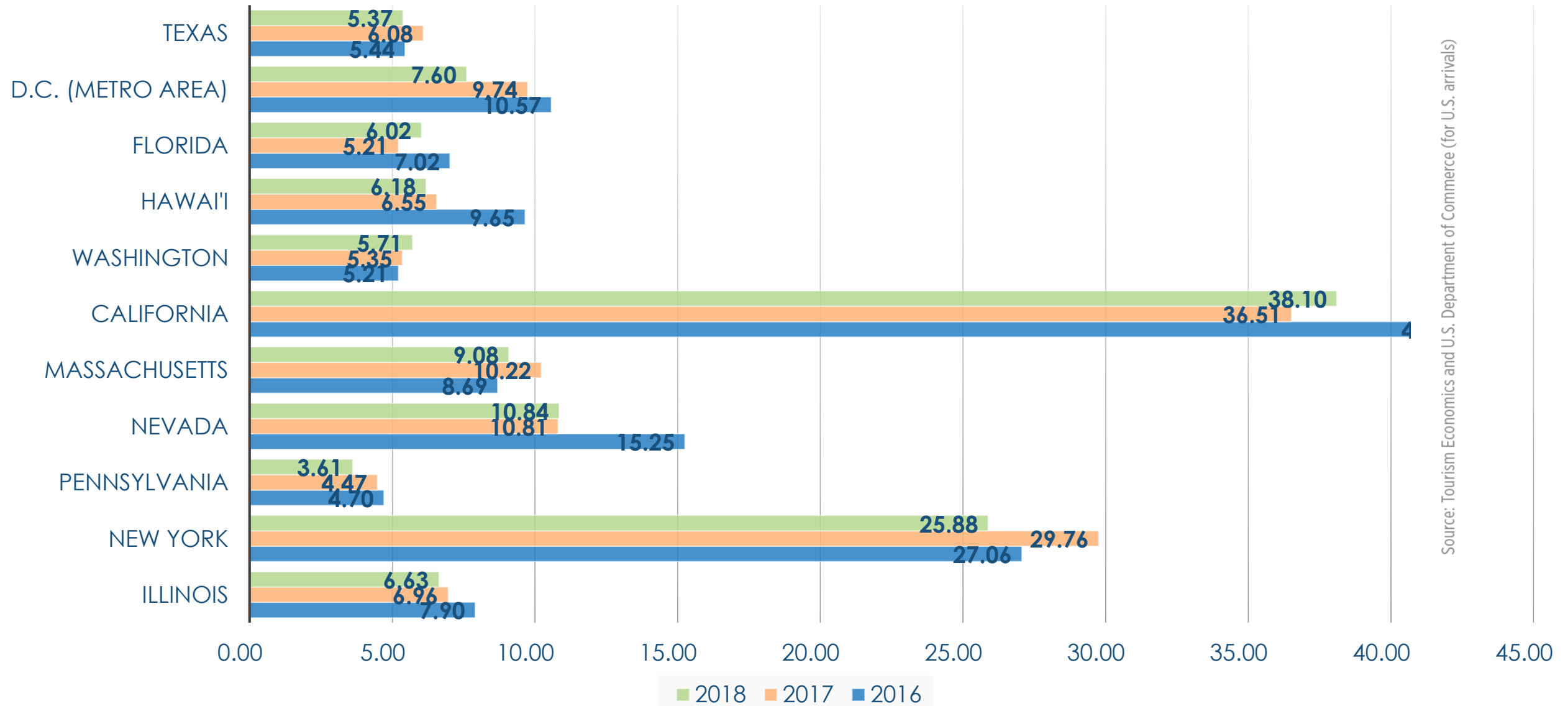
<b>Total:</b>	<b>79.6 million</b>		
1 Canada	21.2 million	6 S. Korea	2.2 million
2 Mexico	18.5 million	7 Brazil	2.2 million
3 U.K.	4.7 million	8 Germany	2.1 million
4 Japan	3.5 million	9 France	1.8 million
<b>-6%</b> 5 China	3.0 million	10 India	1.4 million

## 2018 U.S. Travel Exports *(for all purposes including education)*

<b>Total:</b>	<b>\$256.1 billion</b>		
<b>+3%</b> 1 China	\$34.6 billion	6 India	\$15.8 billion
2 Canada	\$22.2 billion	7 Brazil	\$12.3 billion
3 Mexico	\$20.9 billion	8 S. Korea	\$9.5 billion
4 Japan	\$16.3 billion	9 Australia	\$8.6 billion
5 U.K.	\$16.2 billion	10 Germany	\$8.3 billion

# MARKET CONDITIONS

## Visitation to U.S. Destinations % of Inbound





# CONSUMER TRENDS

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# CONSUMER TRENDS

Industry players should rethink their assumptions about Chinese outbound tourists

## What they like to do



Shop! Shop! Shop!

## Reality

Experience matters more



Exclusively visit iconic landmarks

Diverse travel needs

## How to accommodate them



Short length of stay

Longer length of stay



As travel gain experience, decline  
In package tours

Air + hotel package on the rise and  
activities booking in destination



Only have taste for Chinese cuisine

Fine dining highly valued



Cash/Union Pay transaction only

Alipay/WeChat is a must

## How to attract them



Rely on traditional travel agencies

Friends/family and social media  
play pivotal role, digitally savvy

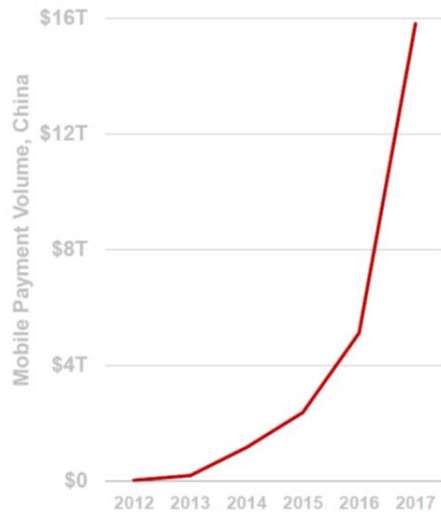


# CONSUMER TRENDS

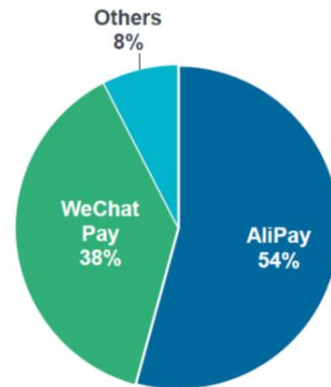
China Mobile Payment Volume = +209% vs. +116% Y/Y Led by Alipay + WeChat Pay

China Mobile Internet Usage (Data) = Continues to Accelerate +189% vs. +162% Y/Y

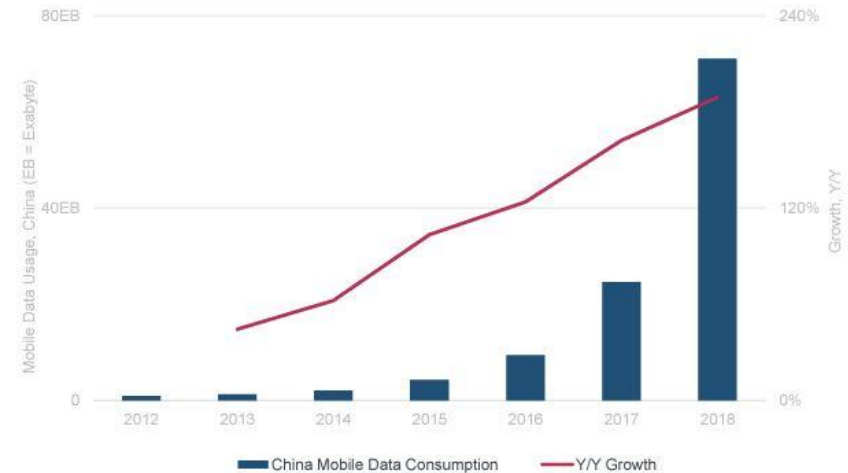
China Mobile Payment Volume



China Mobile Payment Share\*



China Cellular Internet Data Usage & Growth Y/Y





# TARGET AUDIENCE

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# TARGET AUDIENCE

## MILLENNIUM INDIVIDUALIST (MI)

**夏威夷超酷超美跳伞攻略**  
旅行必体验的项目 夏威夷跳伞攻略来啦  
小伙伴们去夏威夷玩耍，那一定要去跳一次伞，不仅是因为夏威夷海岛的风景真的太美，也是因为夏威夷跳伞是全球！最！低！价！敲黑板，真的比其他任何一个地方都要便宜，真的不要太划算！  
被马克吐温称为“大洋中最美的岛屿”的夏威夷，是旅游的天堂，夏威夷跳伞被称为世界最美的跳伞之一，特别是夏威夷欧胡岛的Drop Zone更是被誉为World most beautiful DZ (世界上最美的空天地)。  
夏威夷跳伞目前只能在欧胡岛，(也就是夏威夷的首府檀香山)，火奴鲁鲁) 欧胡岛的跳伞公司目前有两家，分别为 SKYDIVE HAWAII和PACIFIC SKYDIVING，其中Pacific skydiving有21000英尺的高空跳伞，这是不带伞气可以允许的最高跳伞高度。

**酒店私人沙滩**  
THE ROYAL HAWAIIAN GUESTS ONLY  
少女心之感的夏威夷粉色酒店推荐 皇家夏威夷酒店  
“The pink palace of the Pacific”  
酒店真的到处都是粉红色，很多ins博主都来打卡过，普通房型都是圆景，粉色背景墙，房间设施有些老旧，但是有90多年历史的酒店了。强烈推荐塔楼套房，阳台景色真的太美了。携程价格3500左右，酒店每天还有30美金左右的resort fee。

## FAMILY TRAVELERS

**夏威夷 YESIDO 工作室**  
夏威夷  
Aulani a Disney resort & spa  
Birkin 30

夏威夷 say "Yes, I do" in Hawai'i  
很多情侣选择来夏威夷度蜜月，抽出一两天的时间拍摄婚纱照。  
图中的 YES IDO 车牌是夏威夷注册有效的汽车牌照照！  
我的婚纱好看吗  
08-18  
谁说点什么，让 TA 也认识看笔记的人

去年感恩节在夏威夷过的，老大就念着想回来夏威夷，索性就决定圣诞节来夏威夷过了，我一个人带两个，老大女儿6岁，老二儿子22个月，可想有多难搞了吗.....  
因为是带孩子出来旅游，所以主题主要以孩子为准，我们8天在夏威夷，我定了4天在迪士尼主题酒店，后四天在

## AFFLUENT BESPOKE PACKAGE (ELITE)

**HERMÈS PARIS**  
Birkin 30

夏威夷购物 爱马仕菜篮子18奶昔白金扣 降价的北克雅宝  
夏威夷逛什么  
Honolulu有两个大型购物地，Waikiki和Ala Moana  
我住在Waikiki的Royal Hawaiian真的是宇宙中心！楼下就是Royal Hawaiian center，各种名牌店！

**Eggs'n Things**  
**Matsumoto's 彩虹刨冰**  
**Arancino**  
**BLT Steak**  
**FUMIS KAHUKU SHRIMP**

夏威夷欧胡岛保姆级攻略 第一次去夏威夷怎么玩  
欧胡岛是夏威夷所有岛屿中最繁华最有青春气息的一个，也是火奴鲁鲁也是从中国来夏威夷的必到之地，第一次来夏威夷的盆友一定要收好这篇。  
玩  
威基基海滩

1.Desirability

2.Accessibility

3.Disposable Income

4.US Visa Issuance

Beijing  
Shanghai  
Chengdu

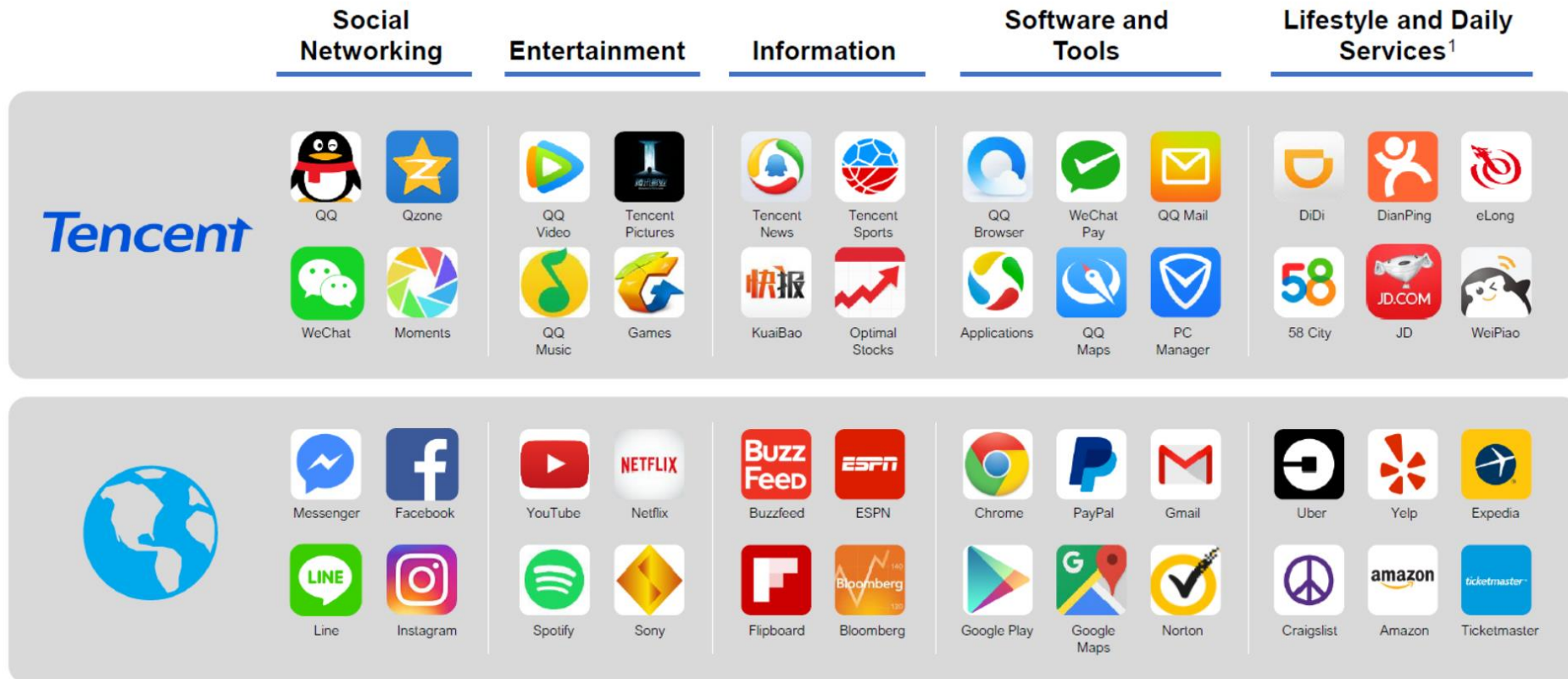


# INTEGRATED DIGITAL MARKETING (IDM) STRATEGY

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# IDM STRATEGY

Built on connecting – Tencent's ecosystem is integral into everyday life in China



# IDM STRATEGY



## Why WeChat?



1.1B

Monthly active users  
Weixin + WeChat

90 mins

50% of users use  
WeChat for at least 90  
mins a day

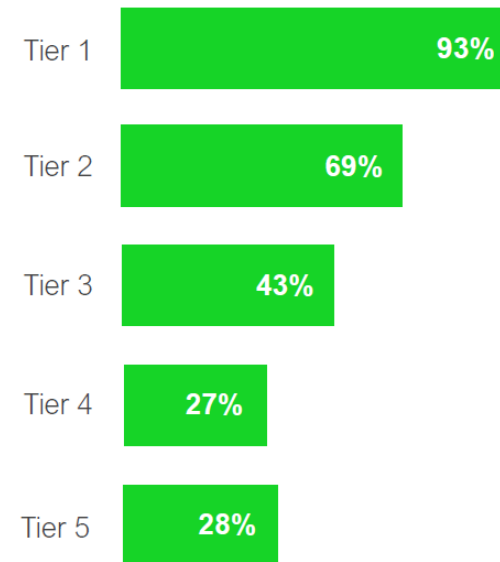
65%

% of All Monthly Active  
Users born in 80s or 90s

>1M

Total Mini Programs on  
the WeChat Official  
Account Platform

WeChat Penetration in China Tier 1-5 Cities



# IDM STRATEGY

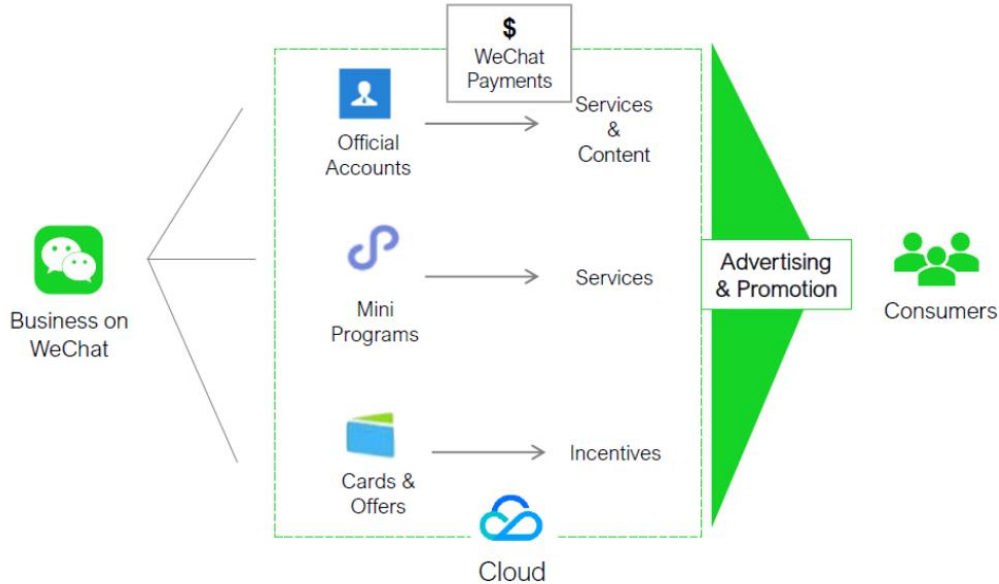


Brands benefit from WeChat's robust ecosystem and open platform



Business Official Account Example

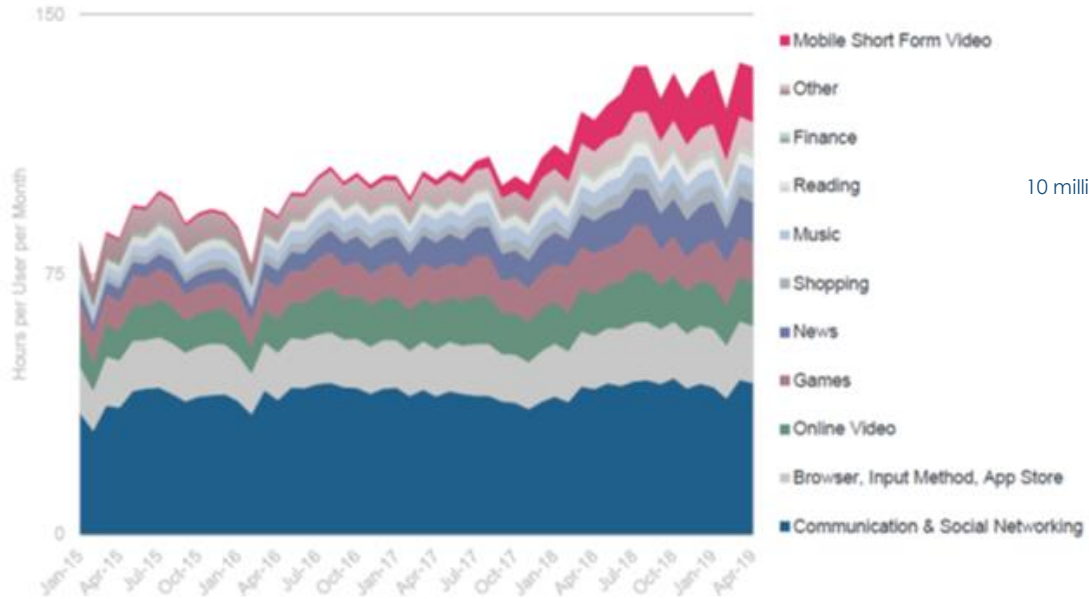
Businesses can establish an Official Account to connect with consumers through WeChat's natural and intimate chatting interface.



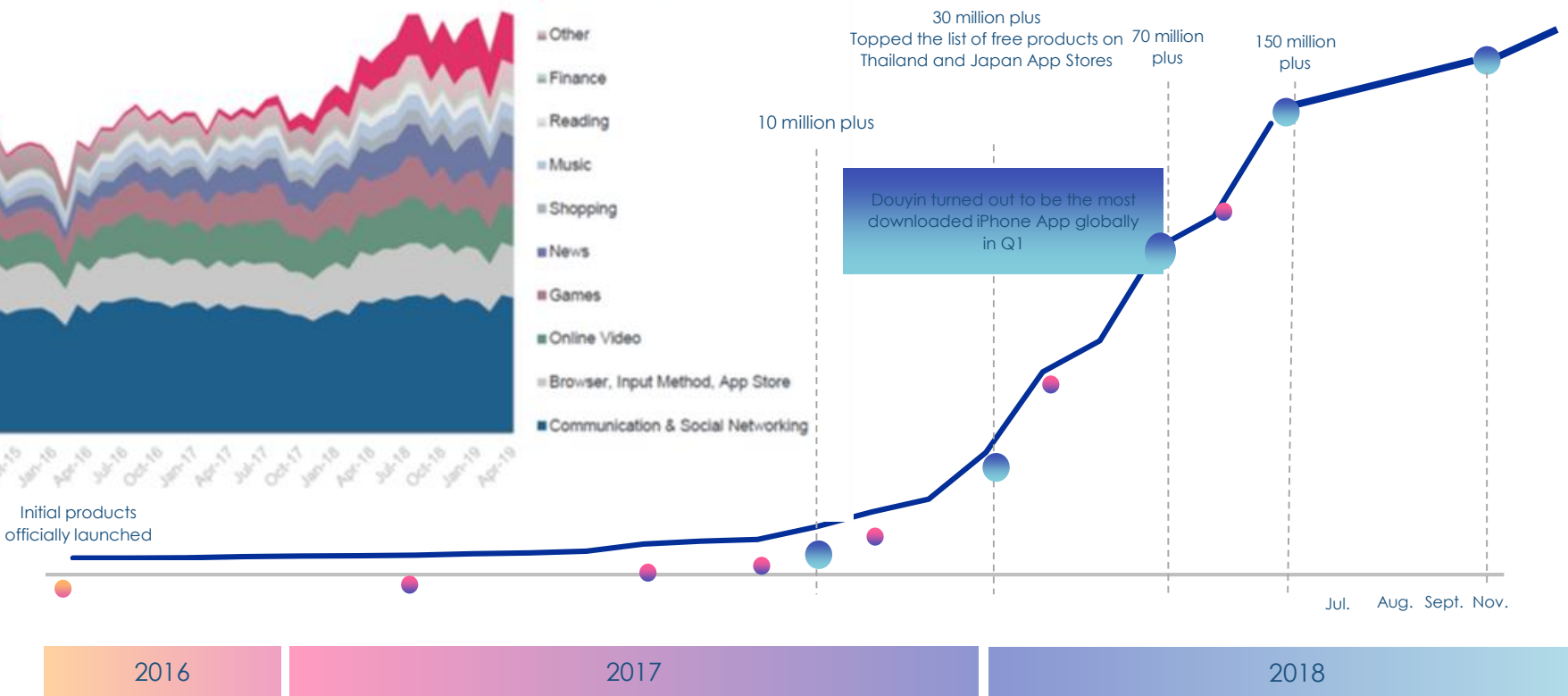
# IDM STRATEGY

## Mainstream Front of Social Short Video Marketing

Average Smartphone Time Spent per MAU per Month



MAU: 450 million  
 DAU: 200 million  
 Daily video views: 20 billion



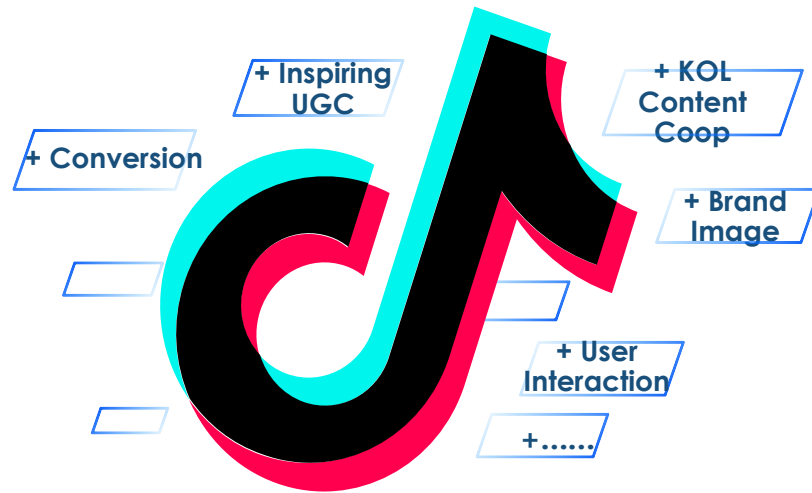
Data source: Sensor Tower; TikTok platform



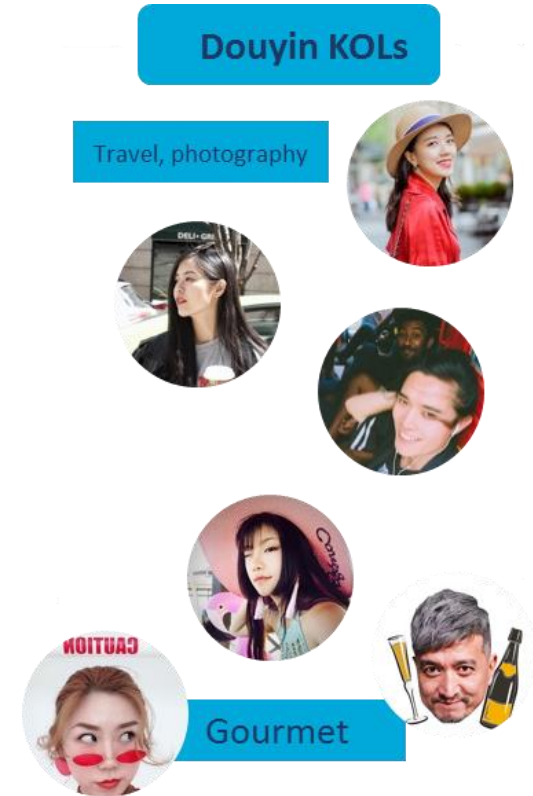


# IDM STRATEGY

First step in short video marketing:  
Set up official Douyin account for Hawai'i



Official Account Page Demo





# Xiaohongshu

Young people's lifestyle platform and consumption decision guide

In Xiaohongshu, users post little moments of their lives through short video, graphic and other forms. As of March 2019, Xiaohongshu had more than 220 million users which continued to grow rapidly, 70% of whom were born in the 1990s.

# IDM STRATEGY

小红书

## Xiaohongshu

Youth's lifestyle platform and consumption guide

KOLs in-depth content coop, enforcing endorsement, and inspiring organic travel UGC

KOLs

Travel

Photography

Gourmet

### 1 Destination "Checking-In" Point by KOL



打卡 La La Land 取景地 格里菲斯天文台  
作为《爱乐之城》影迷  
一直很想来看看女主角第一次约会的场景  
这次特意从Laguna Beach坐了一个半小时的车来到  
这里打卡啦！  
说点什么... 660 115 49

### 2 Destination Travel Tips



【奥克兰】必玩行程分享~第一次空中漫步(恐高)  
【天空塔 Sky Tower】  
奥克兰市中心的标志性建筑自然是Sky  
说点什么... 103 78 32

### 3 Gourmet Recommendation



【日本】全世界最好吃的终极乌冬在高松!  
四国香川县是《日本》乌冬面的发源地，很多人到此就为了吃一碗乌冬面，说他是全世界最好吃的乌冬一点也不为过！我这次和 @玛小粒 Marley 来  
说点什么... 231 142 30

### 4 Ultimate Landscape Photography



裸眼观看银河、流星“大雨”这种什么样的感受  
距离在夏威夷的这次体验已经过去了2个月，一直迟迟忘记和大家分享  
由于之前去天文台被封路没能看到银河，不甘心的我们一直做调查  
说点什么... 1136 1806 125



# Mafengwo Travel

## China's Leading Travel UGC Platform

UGC jointly created by hundreds of millions of FIT travelers, which has more than 60,000 global travel destinations, 600,000 new travel guides and itinerary recommendations, 760 million travel-guide downloads, and is considered as "China's travel bible".

ふみきり

# IDM STRATEGY



## Mafengwo

China's Leading Travel UGC Platform  
KOLs Travel Content Cooperation

KOLs Content  
Forms

- 1 Travel VLOG**  
Vlogs for scenery, gourmet and local culture.
- 2 Travelogue**  
In-depth personal travel notes to evaluate the scenic spots, natural landscape, hotels, food, attractions, shopping etc.
- 3 Travel Guide**  
Travel guides and tips respectively for MI, Family and Elite travelers based on the preferences.

1



2



3



The campaign concept is to move away from stereotyped beach resort sceneries to offer an authentic local Hawaiian experience and let the travelers to define the uniqueness of Hawaiian Islands.

# 拥抱一切想象

EMBRACE ALL IMAGINATION

*The*  
**HAWAIIAN**  
ISLANDS



*The*  
**HAWAIIAN**  
ISLANDS

# 擁抱 一切 想象

*EMBRACE ALL  
IMAGINATION*

To drive demand by improving brand awareness of the Hawaiian Islands. To showcase the culture of Hawai'i, history and people along with our natural beauty.



# 拥抱一切想象

EMBRACE ALL IMAGINATION

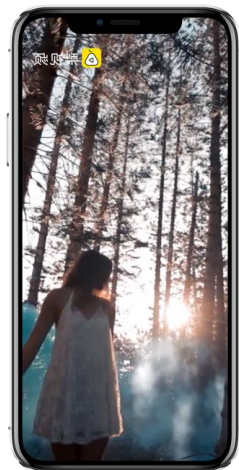
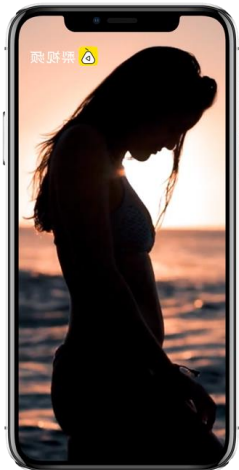
*The*  
**HAWAIIAN**  
ISLANDS

To avoid formulating a “one size fits all” journey for all Hawaiian Islands. The consumption needs of Chinese tourists are constantly fluid and evolving.



# CAMPAIGN DEMO

梨视频X抖音  
 #夏威夷年轻力Vlog周刊#  
 Pear Video X Douyin (TikTok)  
 #Hawai'i youth force vlog  
 weekly# - MI Market



Day1



Day 4



Day 8



Day 10



限时挑战 10天穿越夏威夷  
 Time-limited challenge  
 10 days to travel in  
 Hawai'i - MI Market

'Ohana foodie travel  
 guide campaign  
 #带全家吃遍夏威夷  
 Eat like a local#  
 - Family Market



HAWAII TOURISM  
 CHINA

Nov 2019

# CAMPAIGN DEMO

Partnership with luxury travel platform Ctrip HH Travel #TOP 10 ultimate journeys in Hawai'i#

HHtravel  
海 陆 空 游

热门目的地 酒店精选 酒店暗访 关于我们

## 私人订制——专属你的夏威夷奢适之旅

#夏威夷TOP10极致旅游#

- ✓ 优先领略 哈雷阿卡拉的日出
- ✓ 在直升机上俯瞰壮阔瀑布和火山
- ✓ 依你的味蕾定制专属料理

HAWAII TOURISM  
CHINA



# B2C2B STRATEGY

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# TRADE MISSION 2020

**WE CONNECT  
THE WORLD OF TRAVEL**

13 - 15 May 2020 · Shanghai · itb-china.com

### FOUNDING PARTNERS



### MICE & CORPORATE TRAVEL PARTNERS



### CUSTOMIZED & THEMED TRAVEL PARTNERS



### GROUP BUYER PARTNERS



## BUYERS PROGRAM 2020

### MATCHMAKING

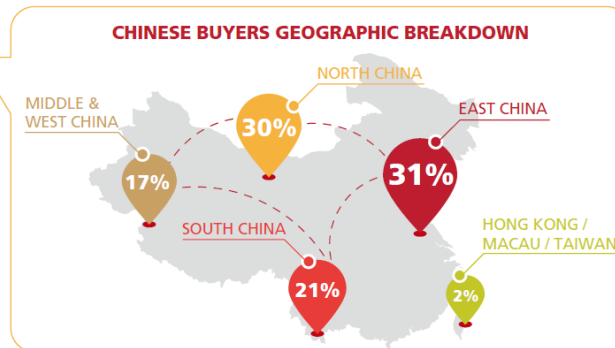
**21,000+**

Match Made & Prescheduled Appointments Maximize Business Opportunities

### BUYERS' ORIGIN

**850**

Chinese Buyers



**ITB  
CHINA**

### DIVERSITY

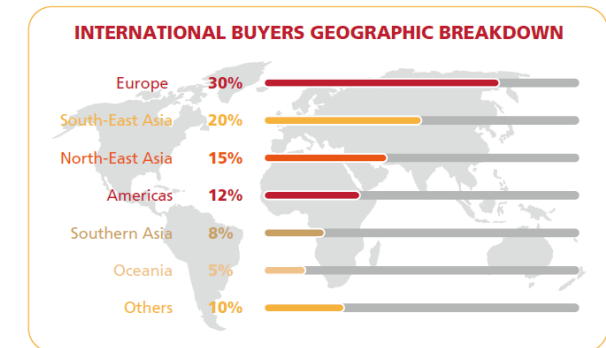
**600+**

Leading Chinese and International Travel Agencies Participating In The Buyers Program Compared With 2018, New Buyer Companies Account For Over 60%

### BUYERS' ORIGIN

**200**

International Buyers



**HOSTED BUYERS**  
**1,050**  
Top And Hand Selected Hosted Buyers



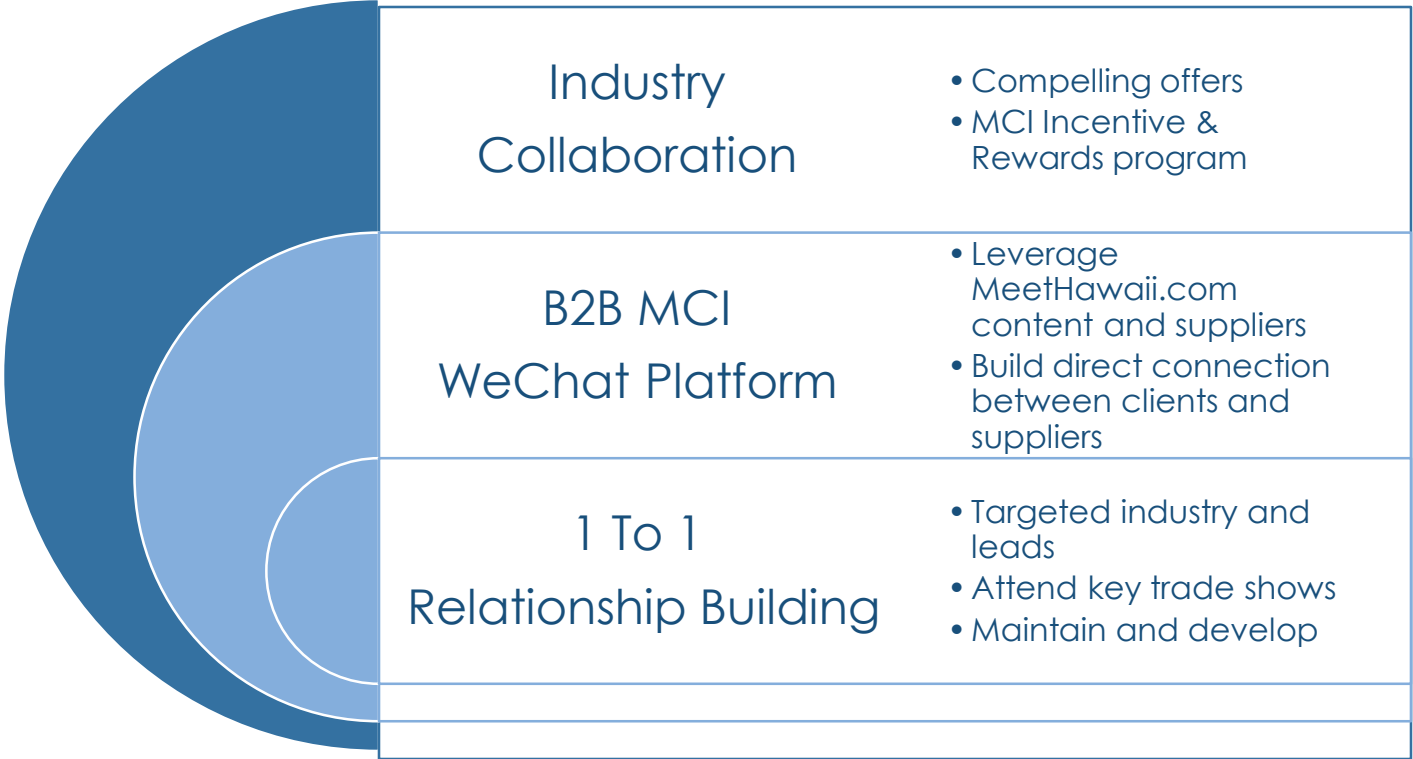
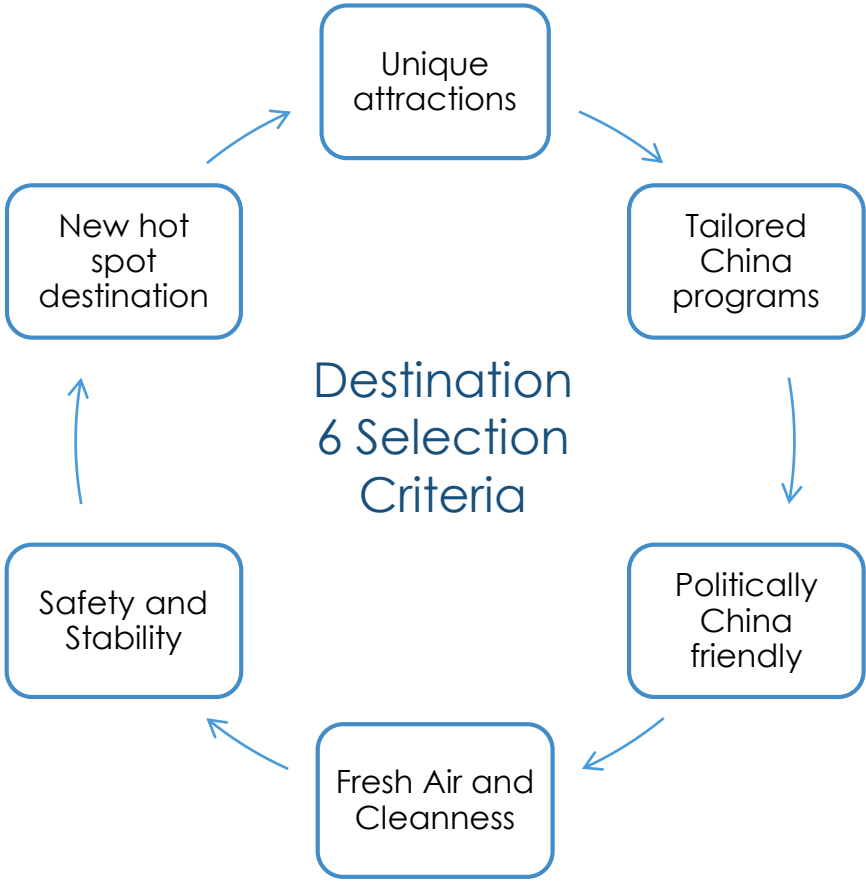


# MCI

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HAWAII TOURISM™  
CHINA

# MCI



## MCI Destination Package Program



1	Accessibility and Ground Transportation Solution
2	Accommodation and Meeting Facilities
3	Themed Dinner / Gala Dinner / Awards Night
4	Team Building Activities
5	Hawaiian Cultural Event / Performance / Local Immersion
6	Sightseeing of Local Icons and Scenery
7	Mix of Both Chinese and Local Cuisines
8	Chinese Language Tour Guides and Service Support
9	Shopping Facility and Exclusive Offers
10	Relate to Corporate Culture / Objectives
11	Corporate Social Responsibility (CSR) Activities
12	Iconic Location for Group Photo





# RESPONSIBLE TOURISM

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# RESPONSIBLE TOURISM



- COMMUNICATE ROOTED, KULEANA and TRAVEL TIPs messaging creatively and respectfully into our digital and social media campaigns and platforms from KOLs to Short Videos.
- LEAD a focus group consortium involving industry stakeholders to ensure consistency of messages to all Chinese visitor groups.
- INCORPORATE HTA's Hawaiian cultural initiatives, Hawaiian values and traditions into the strategic and creative processes.
- ALIGN WITH HTA's 4 Pillars in B2C2B marketing strategy as branding differentiator in the world's most competitive Chinese outbound market to build a long-term ROI.