



2025 Brand Marketing Plan



Andreas Schunck
Account Director, HTE



**GENERAL
ECONOMY**
September
2024

**Unemployment
UK**
4.2%

**Unemployment
DE**
3.7%

**Unemployment
CH**
2.1%

**Inflation Rate
UK**
2.2%

**Inflation Rate
DE**
1.9%

**Inflation Rate
CH**
1.7%

**Exchange Rate
UK**
1.32 USD

**Exchange Rate
DE**
1.11 USD

**Exchange Rate
CH**
1.17 USD



**GENERAL
ECONOMY**
September
2024

GDP UK

Annual growth
rate 2024: 0.3%

Expected rise
to (early 2025):
1.4%

GDP DE

Annual growth
rate 2024: 0.3%

Expected rise
to (early 2025):
1.1%

GDP CH

Annual growth
rate 2024: 1.2%

Expected rise
to (early 2025):
1.7%

GfK UK

Consumer
Confidence:

-11

(improved from -13 in
Jul and highest level
since Sep 2021)

GfK DE

Consumer
Confidence:

-9.9

(slight improvement
due to rising income
expectations)

SECO CH

Consumer
Confidence:

- 35

(improved from
-41 driven by positive
financial outlook)



OUTBOUND TRAVEL EUROPE

Outbound travel from Europe continues to demonstrate significant growth.

- **86.2 million** UK residents' **travel abroad in 2023**.
 - 92% of pre-Covid 2019 levels
- **122 million Germans** are projected to **travel abroad in 2024**.
 - **Surpassing** the pre-pandemic high of **116.1 million in 2019**.
- UK residents' overseas trips expenditure
 - **£72.4 billion in 2023** (plus £13.9 billion from 2022)
- German residents' overseas trips expenditure:
 - **€86.9 billion in 2023** (€80.1 billion in 2022 & €73.1 billion in 2019).
- **2.12 million UK residents visited the US in the first half of 2024**
 - 15.7% increase from 2023 and just 5.1% below the same period in 2019
- **888,880 Germans visited the US in the first half of 2024**
 - 13.3% increase from 2023 and just 4.5% below the same period in 2019



TRAVEL TRENDS EUROPE

- **Increased demand for unique destinations:** More unique, off-the-beaten-path destinations.
- **Sabbatical and Workation Travel:** Longer sabbaticals and workations, combining work, adventure, and relaxation.
- **Experience-Driven Travel:** Preference for cultural explorations, local experiences, and nature-based activities.
- **Luxury and Wellness Travel:** Rising demand for high-end resorts and wellness experiences focused on relaxation and well-being.
- **Sustainability and Responsible Tourism:** Increasing demand for eco-friendly destinations and sustainable travel options, including:
 - **Voluntourism**
 - **Wildlife conservation**
 - **Responsible tourism initiatives**



COMPETITIVE LANDSCAPE EUROPE

- **UK consumers** are searching New York, Orlando, Dubai, **Barbados, Cancun, Maldives, Dominican Republic**, and St Lucia, according to BA Holidays.
- The German Travel Association (DRV) reports strong interest in long-haul destinations such as the US, UAE, **Thailand, Japan, Maldives, and Mauritius**.
- **Swiss travelers**, buoyed by the strong franc, are increasingly interested in long-haul destinations like the USA, **Japan, and Australia**.
- YE August 2024, the Maldives welcomed:
 - **106,161 tourists from the UK (+3% YOY)**
 - **87,608 from Germany (+2.6% YOY)**
 - **24,867 from Switzerland (+2.1% YOY)**
- Fiji reported record visitor arrival and expenditure in July 2024:
 - **Arrival growth from Europe +19% YOY** (2,658 visitors)
 - **UK +7% YOY** (1,154 visitors)





MARKET POTENTIAL EUROPE

- **Economic recovery** is projected for **2024 and 2025**.
- **Consumer confidence boost** and increased (travel) spending power expected.
- Current **record highs in overall spending** and **share of long-haul trips**:
 - In 2023, long-haul travel among German travelers accounted for **9% of all trips aboard**, up from 8% in 2019, marking an all-time high.
- **Growing demand** for **luxury, sustainable holidays, beach vacations, and cultural experiences**.
- **Increase in air capacity** to the US from Europe.
- **Hawai'i Tourism Europe's 2025 BMP**

A person is swimming in the ocean, with mountains in the background. The text "2025 STRATEGY" is overlaid on the image.

2025 STRATEGY



**TARGET
AUDIENCE
EUROPE**

- **Mindful High Value Travelers:**
 - Spend & disperse more
 - Stay longer
 - Eager to **deepen** their **cultural understanding**
- **High-Value Travelers** from the UK, Germany, and Switzerland:
 - Approx. **15-20 million**
 - Earn a **minimum of \$90,000 to \$110,000 p.a.**
 - **High-Net-Worth Individuals population** approx.. **2.7 million**
 - Spend between **\$3,500 and \$5,500 per trip** to the U.S.

CONSUMER STRATEGY EUROPE

Awareness Objectives:

- Enhance **Hawai'i's brand awareness**, build trust, credibility and recognition.
- Focus messaging on **responsible tourism**, diversity of **Hawai'i's** people and culture, natural beauty, and relaxation.
- **Regain market share**

Consideration Objectives:

- Deliver **personalized content** to educate audiences on the **Hawaiian Islands**.
- Encourage **planning and interaction**.
- Drive traffic to **HTA's platforms** and increase **data collection**.

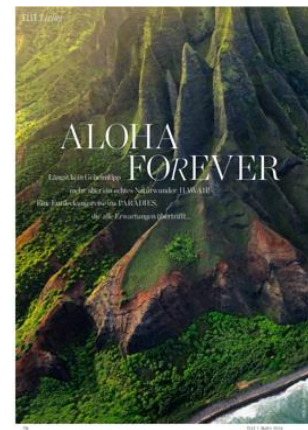
Conversion Objectives:

- Partner with **tour operators, airlines, and affinity brands** to expand reach.
- **Drive traffic** to partner **campaign pages** and stimulate bookings.



PR STRATEGY EUROPE

- **Protect and enhance Hawai‘i’s brand** by highlighting its culture, environment, and preservation efforts.
- **Engage** with key **traditional and digital media** (consumer and travel trade).
- Share compelling **news updates** and **destination stories**.
- **Educate audiences** through:
 - **Press releases & pro-active story pitching.**
 - **Media calls** and **networking events** (e.g., Visit USA Media Marketplace 2025).
 - **Individual and group press trips** (2 x groups and 2 x individual in 2025).



TRAVEL TRADE STRATEGY EUROPE

The **travel trade is crucial in Europe:**

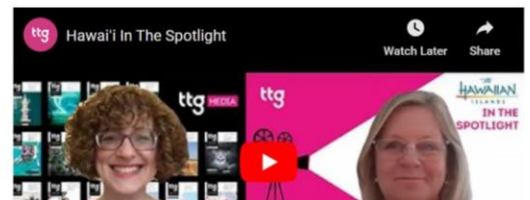
- Value of travel advisors for their **expertise** and **financial protection**.

Trade Communication & Engagement

- **Foster relationships** and attend **trade and industry events**.
- **Communicate** product news, events, **voluntourism**, and **agritourism programs**.

Trade Education

- **Online & face-to-face training** on Hawai'i's unique island brands.
- Increase **Hawai'i Destination Specialist Program (HDSP) completions** in 2025.
- Organize **2 x product manager** and **2 x travel agent fam trips** in 2025:
 - Incorporate **multiple islands, Mālama** and **locally owned businesses**.
- **'Traditional' co-op marketing campaigns** including B2B and B2C (two in 2025)



Hawai'i Webinarserie: Teil 3/3 am 19. April

Aloha! Im letzten und 3. Teil der Hawai'i Webinarreihe am 19. April um 11 Uhr erfahrt ihr alles über die aktuelle Situation der Insel Maui sowie deren Schwesterinseln Lana'i und Moloka'i. Was versteht ihr unter respektvollem Reisen? In Hawaii gibt es dafür ein Wort „Mālama“.

[Meldet Euch jetzt zum Webinar an.](#)



IMPLEMENTATION

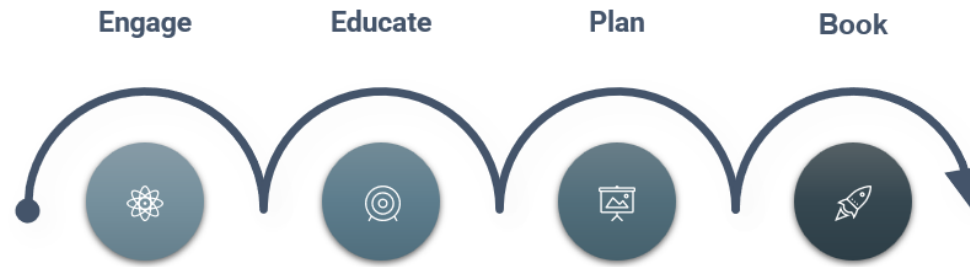
An underwater photograph showing the lower half of a person on a surfboard. The person's legs and feet are visible, with the surfboard's fins extending downwards. The water is a deep teal color, and the surface above is bright with many light reflections, creating a bokeh effect. The word "IMPLEMENTATION" is written in a bold, white, sans-serif font across the middle of the image.

MAJOR PROGRAMS 2025 EUROPE

Mindful Hawai'i Integrated Campaign Jan – Dec 2025

- Mindful travelers seek **inner balance** and prioritize destinations that offer **self-reflection** and **stress relief** opportunities.

Campaign Strategy



Mindful Hawai'i Campaign Content



VIDEO ASSETS

Sunrise Serenity
Rainforest Retreat
Tranquil Tides

AUDIO ASSETS

Nature Soundscape
Ocean Harmony
Cultural Whisper

MICROSITE

User friendly, interactive and
SEO optimized
Hosting content assets
Resource for planning

APP BRAND PARTNERSHIP

(e.g., Calm/Headspace)
Video and audio files will be
made available
Promotion (social / EDM)

- Produce series of video and audio assets e.g., for **guided meditation**.
- Showcase Hawai'i as the perfect destination for mindful travelers, **seeking peace, relaxation**, and a **deep connection** with **culture** and nature.

MAJOR PROGRAMS 2025 EUROPE

Mindful Hawai'i Campaign Channels

- Video on Demand / Video Display / Social (Meta) / Brand Partnership Channels / Programmatic Audio / Out of Home / Dynamic Re-Targeting.



Mindful Hawai'i Campaign Deliverables

KPI	DE	UK	CH
IMPRESSIONS	9,734,416	9,734,416	7,703,166
REACH	2,433,604	2,433,604	1,925,791
VIDEO / AUDIO VIEWS	1,605,714	1,605,714	1,180,714
VIDEO / AUDIO COMPLETES	802,857	802,857	590,357
CLICKS / INTERACTIONS WITH ASSETS	46,688	46,688	36,063
INTERACTION RATE %	1.71%	1.71%	1.64%
ARRIVALS TO MINDFUL HAWAII MICROSITE, GO HAWAII OR TOUR OPERATOR SITES	17,828	17,522	14,108

Partner Deliverables

- Partners buy in through contra marketing activities.
- 2 tour operator / airline partners per country (6 in total).

MAJOR PROGRAMS 2025 EUROPE

Your Personal Aloha Campaign Sep – Dec 2025

- **AI-powered Experience Builder** using **Microsoft's Open.ai platform**

Campaign Strategy / User Journey

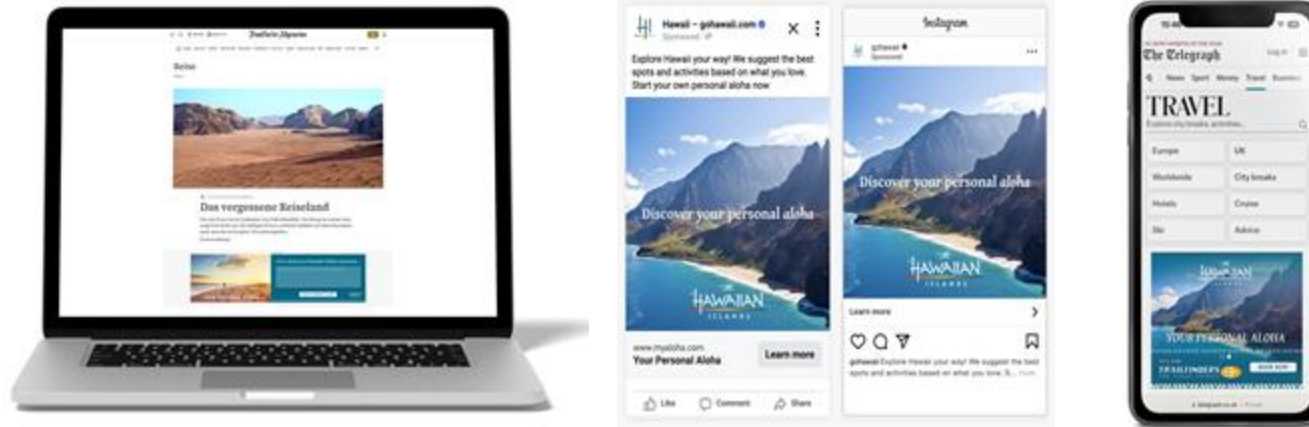
- **Stage 1:** Deliver the Your Personal Aloha AI Experience Builder via rich media ads to highly targeted users.
- **Stage 2:** Users enter their holiday preferences in the ad and press "Go."
- **Stage 3:** AI curates a list of Hawai'i experiences based on user preferences within the ad unit – itinerary **can be shared via social** or email.
- **Stage 4:** Users click through to the microsite to explore itineraries and deals.
- **Stage 5:** Engaged users are added to our data pool.
- **Stage 6:** Users in this data pool receive retargeting ads provided by participating tour operators.



MAJOR PROGRAMS 2025 EUROPE

Mindful Hawai'i Campaign Channels

- Interactive Display / Social (Meta) / Brand Partnership Channels / Dynamic Re-Targeting.



Mindful Hawai'i Campaign Deliverables

KPI	DE	UK	CH
IMPRESSIONS	5,056,277	5,056,277	3,307,359
REACH	1,264,069	1,264,069	826,840
CLICKS / INTERACTIONS WITH ASSETS	151,688	151,688	99,221
INTERACTION RATE %	3%	3%	3%
ARRIVALS TO MINDFUL HAWAII MICROSITE, GO HAWAII OR TOUR OPERATOR SITES	9,113	9,113	5,661

Partner Deliverables

- Partners buy in through contra marketing activities.
- 1 tour operator / airline partners per country (3 in total).



**PARTNER-
SHIP
OPTIONS
2025
EUROPE**

- **Support 2 x Travel Agent Fam Trips** (Islands TBC – Q1/Q2 + Q3/Q4).
- **Support Product Manager Fam Trip** (Islands TBC – Q3/Q4).
- **Support 2 x Group Press Trips** (UK: Kaua'i und Maui / Germany: O'ahu und Maui – Q2).
- **Support 2 x Individual Press Trips** (Islands TBC – Q3).
- **Join trade trainings** (in-person and webinars – ongoing).
- **Support events** in Europe (consumer/trade).
- **Share** your news for **press releases and trade training**.
- **Support consumer and trade coop campaigns** (Information, in-kind support and special offers for participating tour operator partners).

A woman in a purple top and dark skirt is performing a hula dance in front of palm trees at sunset. The scene is silhouetted against a bright, golden sky. In the background, other people and palm trees are visible, along with a body of water and a distant city skyline.

Mahalo nui loa!