



2025 HTA Spring Tourism Update - Europe Market

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HAWAI'I TOURISM EUROPE TEAM



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STATISTICS 2024

VISITOR STATISTICS



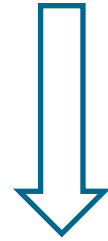
-22 %

Arrivals



-30%

**Total
Spending
(Mil)**



-11.3%

**Per Person
Per Day
Spend**



-21.2%

**Visitor
Days**



+1.6%

**Length of
Stay
(Days)**

2024	91,110
2023	117,241
2019	137,908

\$257.7
\$369
\$268.1

\$215.7
\$243.2
\$150.6

1,194,789
1,517,015
1,780,190

13.1
12.9
12.9

MARKET INSIGHTS





GENERAL ECONOMY

UNEMPLOYMENT

Germany
6.2%

UK
4.4%

Switzerland
4.4%*

INFLATION

Germany
2.3%

UK
3%

Switzerland
0.4%

EXCHANGE RATE (US\$)

Germany
1.10

UK
1.26

Switzerland
1.08

* December 2024.



TRAVEL TRENDS

- **Strong** but **not exceptional** peak booking; **longer decision-making** process
- Prepared to **sacrifice short breaks** for **long-haul**
- Demand for less crowded **'de-tour' alternatives**
- **Natural phenomenon** e.g. Northern Lights and bioluminescent beaches **key motivators**
- Surges in travel to popular **film/TV locations**
- Growth in travel to **lesser-known** and **cold-climate** destinations
- **Longer holidays** to balance flight costs



TRAVEL SENTIMENT

- European travellers report **high satisfaction**
- View US holidays positively, but **concerns over cost and political change** have dampened enthusiasm
- Half of British **more concerned** about travel **costs**
- Consumers aged **50+ particularly optimistic** about travel plans for 2025 (UK)
- **63%** of Germans **anxious** about 2025 (**up** from **59%** in 2024), but travel **demand** remains **strong**
- Average German holiday **duration** increased from **8.5** to **10** days for main trips
- **Strong desire to visit** Hawai'i



OUTBOUND TRAVEL

- UK outbound market generated **£51.6 billion** in **2024**, an **increase** from **2019**
- German market to grow from **\$114.96B** (2024) to **\$292.80B** by 2034
- Germans spent nearly **€2 billion** on holidays in November 2024, a **9% YoY increase**
- **Swiss** outbound set for **continued growth** in 2025, with high **demand** for **long-haul**

COMPETITIVE MARKET



MARKETING STRATEGY

TARGET AUDIENCE



**Affluent
Travellers**



**Culture & Nature
Seekers**



**Young
Professionals**



**Responsible
Travellers**



**Adventure
Seekers**



CONSUMER STRATEGY

- Integrated consumer strategy - **awareness** - **consideration** - **conversion**
- **Strategic partnerships** - tour operators, airlines
- **Data targeting** - utilising technology to reach the right audience
- **Multi-channel approach** - rich content with creative technology and data
- **Personalised** content to reach specific audience segments



TRADE STRATEGY

- **Travel trade is extremely important** in Germany, Switzerland and the UK
- Ensure we **educate** trade through in-person **training**, webinars and online **training program**
- Improve tour operator **website / brochure** content **accuracy** and **depth**
- Showcase Hawai'i's cultural **authenticity** and **regenerative initiatives**
- Represent at key **trade shows** and **events** (Loop Luxury, ITB, IPW, Brand USA, Visit USA)
- Host **2** product manager **FAM trips** to expand **knowledge** and **product** range



PR STRATEGY

- Distribute **12** targeted **press releases** covering unique Hawai'i experiences
- Pitch **customized stories** aligned with editorial calendars, events and brand story
- Attend in key **media events** to maintain regular engagement with **trade** and **consumer press**
- Deliver **1 individual** and **1 group** press **per market** annually
- Ensure **crisis** communication **readiness** with established protocols

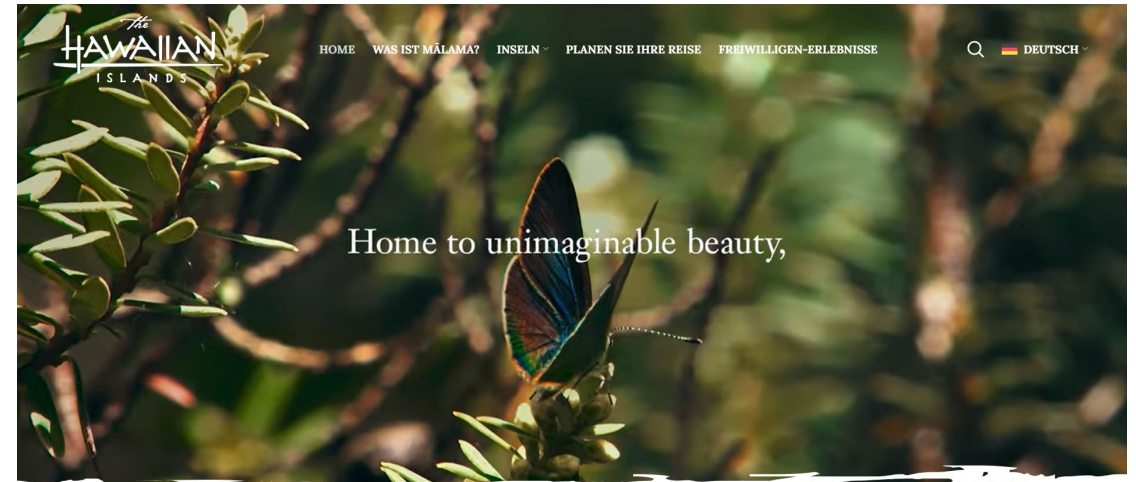


MARKETING IMPLEMENTATIONS



Q1 FOCUS

Digital Consumer Campaign “The People. The Place”



Mālama Hawai'i – Mehr als nur eine Reise

Die erfüllendste Reise ist die, die nicht nur Ihnen, sondern auch der Welt etwas zurückgibt. Die Route durch die Inselwelt Hawai'i, die Ihr Leben verändert, finden Sie in keinem Reiseführer. Denn das wahre Geheimnis von Hawai'i's Magie liegt nicht nur in der überwältigenden Schönheit der Natur oder der lebendigen Kultur – es ist die tiefe Verbundenheit, die alles miteinander verknüpft.

Wenn Sie durch die atemberaubenden Landschaften von Hawai'i streifen, wird schnell klar: Es geht um mehr als nur beeindruckende Ausblicke. Es geht darum, den Geist von Mālama zu leben – Fürsorge für das Land, die Menschen und das kulturelle Erbe, das diese Inseln so einzigartig macht. Verantwortungsvoll zu reisen, steht im Mittelpunkt dieser Philosophie, damit Hawai'i auch in Zukunft ein blühendes Paradies bleibt. In diesem Abschnitt finden Sie leicht umsetzbare und inspirierende Tipps, wie Sie nachhaltig reisen, die lokale Kultur feiern, die Gemeinschaften unterstützen und die Inseln mit Liebe und Respekt entdecken können.



Q1 FOCUS

Travel Weekly (circ. 6,500) / Aspire (circ. 10,725) UK Trade Campaign

- Dedicated solus email (dis. 5,000)



Discover a luxury destination with unique cultural richness and authentic experiences at its heart

Diverse landscapes that sweep from ocean-lapped coast to misty volcanic peaks, extraordinary experiences rooted in authenticity and tradition, the radiating warmth of genuine hospitality – welcome to Hawai'i, a unique destination where luxury meets heartfelt cultural connection.

Aloha spirit

Hawai'i is as much about its culture and people as it is the destination. From learning about the traditions and meanings of *lei* with a lei-maker in O'ahu to sharing the joy of *male* (Hawaiian music) in Kaua'i, clients will be immersed in the aloha spirit as soon as they arrive. Visitors will feel a sense of belonging as they join the Hawaiian '*ohana*' (family) – an indescribable feeling that must be experienced to be believed.

Treading lightly

Hawai'i is built on the concept of *mālama* (to give back) – from the land to the ocean, the forest to the fish pond, here the circle of life exists in its purest form, and connection to nature and community is celebrated and treasured. Eco-minded clients can pay it forward by taking part in

beach clean-ups and native tree planting. Even everyday experiences can embrace *mālama*, from enjoying a cup of Kona coffee to shopping for wares crafted by artisans in wood, shells and *lanahala* (weaving).

Luxury accommodation

A stand-out collection of sanctuaries awaits in Hawai'i and there's a high chance clients will find their favourite brand: Four Seasons' five resorts are

strung across Hawai'i Island, Maui, O'ahu and Lāna'i, while The Ritz-Carlton has three properties, including luxury residences, across Maui and O'ahu. Other renowned stays include celebrity haunt Montage Kapalua Bay; 1 Hotel Hanalei Bay, which fuses wellness and sustainability; Kona Village, A Rosewood Resort, set in an ancient fishing village; and adult-only hideaway Romer Waikiki at the Ambassador.

Unique experiences

While luxury exists in abundance in Hawai'i, true meaning is found in the richness of experiences. Snorkel with manta rays on the Kona Coast. Learn to surf in the gentle, warm waves of Waikīkī Beach. Watch thousands of *hahāli* (humpback whales) migrate to mate and nurse their young in Maui. Get tickets to *Aunani*, the new Cirque du Soleil show exclusive to O'ahu. Tee off on a spectacular golf course, the ocean as your audience. In Hawai'i, endless possibilities await beyond the beach.

To learn more, take the Hawai'i Destination Expert Training at agents.gohawaii.com/register



To discover more about Hawai'i, visit gohawaii.com



SAY 'ĀLOHA' TO HAWAIIAN CULTURE

Hawai'i is far more than its lauded beaches and tropical landscapes – clients can peer into the islands' soul by embracing its authentic cultural spirit

Sugar-soft beaches, rainbow-hued reefs and steaming volcanoes have long positioned Hawai'i as a byword for paradise. But there is also plenty of substance in the destination's traditional culture and warm-hearted people. It's less fly and flop and more of a slow soak and savour – allowing mindful travellers to unravel a completely different side to these Pacific Islands.

AUTHENTIC ROOTS

The culture of Hawai'i is one that gently simmers through its people and experiences, knitted together by the warm aloha spirit – a word that's far more than a simple greeting. There's no shortage of ways for clients to embrace the '*ohana*' (family) aura and tap into the islands' unique pulse, from buying local goods to enjoying festivals or getting involved in voluntourism. Maui's laid-back towns are home to skilled artisans whose products – ranging from honey to Polynesian woodcrafts and homegrown coffee – give clients the chance to take an authentic slice



COMMUNITY SPIRIT

Clients can enrich their travels by making deeper connections with Hawaiian culture. The emerald-hued mountains may have earned Kaua'i its 'green island' moniker, but it's the locals that make the island tick. Visitors can see how by exploring its roots in the hula dance – at a festival, by having a lesson with a local at a *hula hula* or as part of a *li'au* celebration of Polynesian food and music. They can also uncover the rich history of Hawai'i at O'ahu's Iolani Palace (pictured), Bishop Museum and Hawai'i Plantation Village. Proof there are plenty of layers to Hawai'i just waiting to be discovered.

of Hawai'i home. Hawai'i Island, the largest in the archipelago, promises similar encounters with local produce for clients. From touring coffee farms to wandering the farmers' markets that pop up all across the island.

Give back through Mālama

Embodying the '*ohana*' sense of community, the Mālama Hawai'i Program allows clients to give back to the local culture they're enjoying through voluntourism projects bookable through hotels and local partners. Taking part in activities such as reforestation initiatives, beach clean-ups and quilting sessions will add a rewarding element to any holiday in Hawai'i.



For more information visit [GoHawaii.com](https://gohawaii.com) or become a Hawai'i Destination Specialist at tinyurl.com/hawaiiDT





Q1 FOCUS

- **Visit USA Island Hopping** (140 consultants trained 10-minute in-person sessions)
- **Loop Leisure Spring Event Focused on Luxury Products**



Q1 FOCUS

British Airways Holidays (UK) Co-op Campaign

- You magazine advertorial (800,000 readership)
- MailOnline travel newsletter (158,000 subscribers)
- Channel Hub article (10,000 guaranteed views)
- Targeted digital ads to drive conversions





KEY CAMPAIGN

The People. The Place. The Hawaiian Islands.

Mar – Jun 2025

- **Overview**

Working with premium mindfulness platforms Headspace, 10% Happier, Calm to establish Hawai'i as the ideal destination for affluent wellness seekers.

- **Target Audience**

High-income professionals seeking meaningful escape and authentic restoration experiences.

- **Execution Approach**

Captivating visitors through immersive audio-visual content and social advertising, supported by a dedicated microsite. Retargeting to deliver leads to tour operators.



KEY CAMPAIGN

“Your Personal Aloha”

Sept – Dec 2025

- **Overview**

AI-powered Itinerary Builder technology delivering personalized Hawai'i vacation recommendations to European travelers based on their stated preferences.

- **Target Audience**

Qualified long-haul travel intenders from Europe seeking personalized vacation experiences.

- **Execution Approach**

Delivering AI recommendations through ads and microsite, with retargeting to connect engaged users to tour operators.



ADDITIONAL ACTIVITY

- **4 Press and 2 Trade FAM's (Yearound)**
- **UK Travel Trade Campaign (Sept/Oct)**
- **German Co-Op Campaign (Oct)**
- **Trade & PR Events include:**
 - IPW (Chicago)**
 - Visit USA Media Marketplace (UK)**
 - Visit USA Summer Affair (UK)**
 - Lusso Luxury Roadshow (UK)**
 - Brand USA Travel Week (Europe)**



MAHALO!