

2026 BRAND MARKETING PLAN



HAWAII TOURISM™

EUROPE

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TEAM



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TOURISM FORECAST 2025

0.09M

Visitor Arrivals
(million persons)

-23.5%

% Change in Visitor Arrivals
from Previous Year

1.15M

Visitor Days
(million Days)

-22.8%

% Change in Visitor Days from
Previous Year

\$0.27B

Visitor Spending
(billion \$)

-13.8%

% Change in Visitor
Spending from Previous
Year

- DBEDT forecast significant decline in 2025
- Concerning, but explainable
- Spend / visitor in 2024 - \$2,667
- Predicted spend / visitor in 2025 - \$3,000
- Consumer sentiment and value for money

TOURISM FORECAST 2026

0.10M

Visitor Arrivals
(million persons)

7.1%

% Change in Visitor Arrivals
from Previous Year

1.24M

Visitor Days
(million Days)

8.0%

% Change in Visitor Days from
Previous Year

\$0.30B

Visitor Spending
(billion \$)

10.3%

% Change in Visitor
Spending from Previous
Year

- 
- Modest recovery expected in 2026 across Europe
 - DBEDT data covers all 44 European countries
 - HTE proactive in Germany, Switzerland and UK
 - Gradual improvement anticipated in 2026
 - Germany and Switzerland challenging, but recovery expected when political conditions stabilize
 - Strategy to continue to target high -value visitors
 - Position Hawai'i as different to Continental USA

TRAVEL TRENDS



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TRAVEL TRENDS

WHAT IS TODAY'S EUROPEAN TRAVELLER LOOKING FOR IN A HOLIDAY?

- Outbound market is growing and increasingly premium
- UK and Germany lead European travel
- Strong desire to visit Hawai'i remains
- Value drives all demographic decisions
- Affordable luxury experiences key
- Sense-of-place accommodation highly valued
- Island hopping appeals when showing differences
- Europeans invest in values-aligned experiences



TRAVEL TRENDS

HOW ARE UK TRAVELER BEHAVIOURS EVOLVING?

- High intent for travel to Hawai'i
- Booking extremes: weeks ahead vs years ahead
- Millennial travel agent revival
- Wellness drives luxury demand
- Beach holidays dominate premium market
- Culture / nature add additional value



TRAVEL TRENDS

WHAT'S SHIFTING FOR GERMAN AND SWISS TRAVELLERS?

- High intent and long-haul resilience
- Early booking momentum
- Value vs. premium willingness
- Relaxation and wellness
- Authenticity first
- Sustainability matters



WHO ARE WE TARGETING?

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WHO ARE WE TARGETING?



Ethical Explorers (Ages 28-45)

- 83% say sustainable travel matters
- Seek authentic engagement and cultural immersion, avoid overtourism
- Why? Spend more, stay longer, respect culture



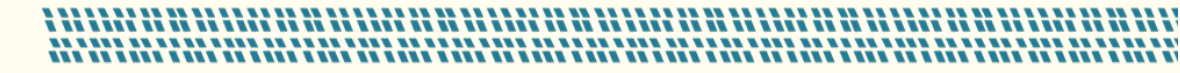
Wellness Seekers (Mid-30s to 60s)

- 56% prefer health-conscious holidays
- Spa treatments, spiritual / retreat experiences, physical exercise
- Why? High spend, premium / unique experience seekers



Conscious Families (Affluent Millennials)

- 70% seek cultural experiences for children
- Values-based travel, adventure, bonding opportunities
- Why? Multi-generation spend, educational investment, repeat visitation



TRADE & PR STRATEGY

TRADE

- Trade training and education
- Content enhancement – websites and brochures
- Market presence – trade shows, events and FAMs

PR

- Strategic communications (12 targeted releases)
- Customized media stories
- Relationship building
- FAM trip programme
- Crisis readiness



'ŌLELO HAWAI'I

Q1-Q2: Cultural Campaign

TIMING: March / April

MARKETS: Germany / UK

- Awareness – Consideration - Conversion strategy (TO partners)
- Digital campaign - precision targeting
- Cultural heritage and Hawaiian language focus
- Targeting *Ethical Explorers*
- Aligned with British Museum exhibition

ONE 'OHANA, FOUR STORIES

Q3-Q4: Experience Campaign

TIMING: October / November

MARKETS Germany / Switzerland / UK

- Multi-faceted, digital TO partner campaign
- Showcasing each island's unique 'āina (land) and kai (sea) personality
- Targeting *Wellness Seekers* and *Conscious Families*

Innovative Creative Formats

1. Swipe-to-Reveal Concept

This concept highlight different locations in Hawai'i based on "either / or" selection. Users click on the selection to reveal a bespoke content frame with detail.

2. Multi -frame with Video

Ideal for multiple messages, with video and options for multiple promotion to a variety of experiences / islands. Final frame can also be utilized for additional messaging.

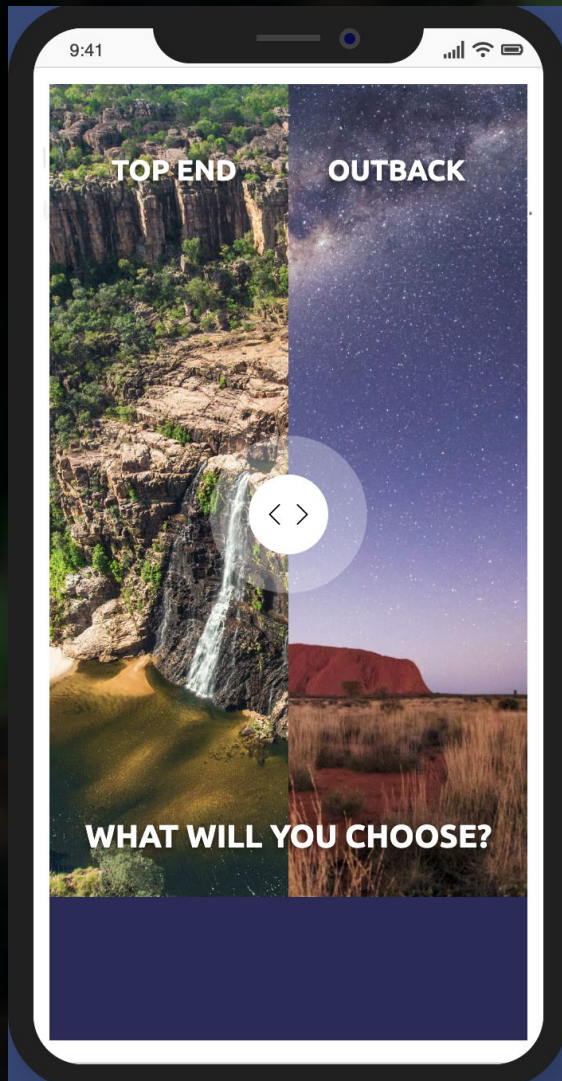
3. Hawai'i Island Grid Format

A flexible multi experience or multi-island grid format that can be used to showcase islands, experiences and partners.

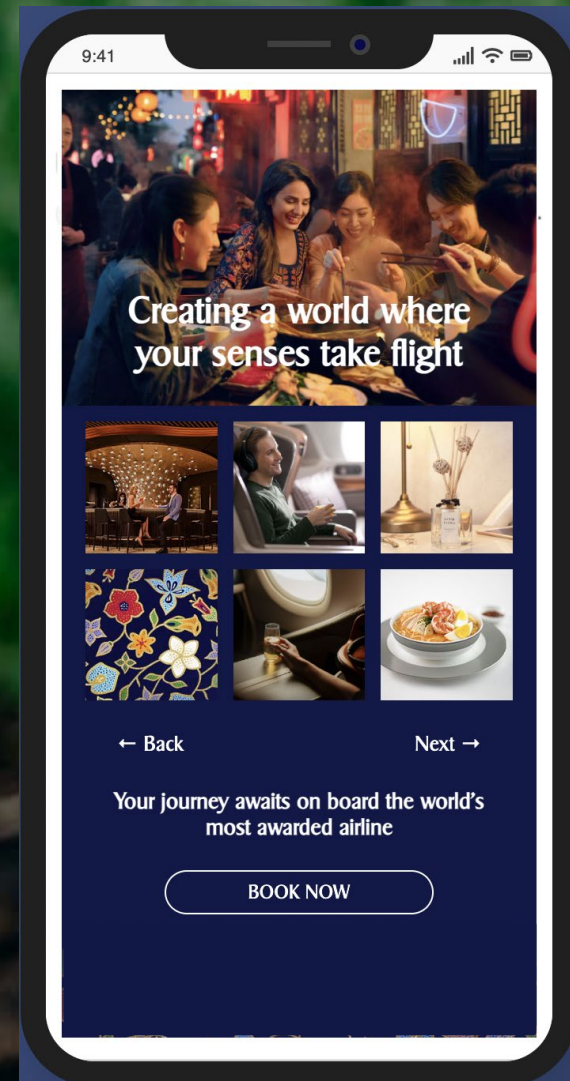
4. Interactive Video Format

Allows the user to choose the content to feel like they are in charge of the narrative. Messaging is clear and can be defined for TO partner.

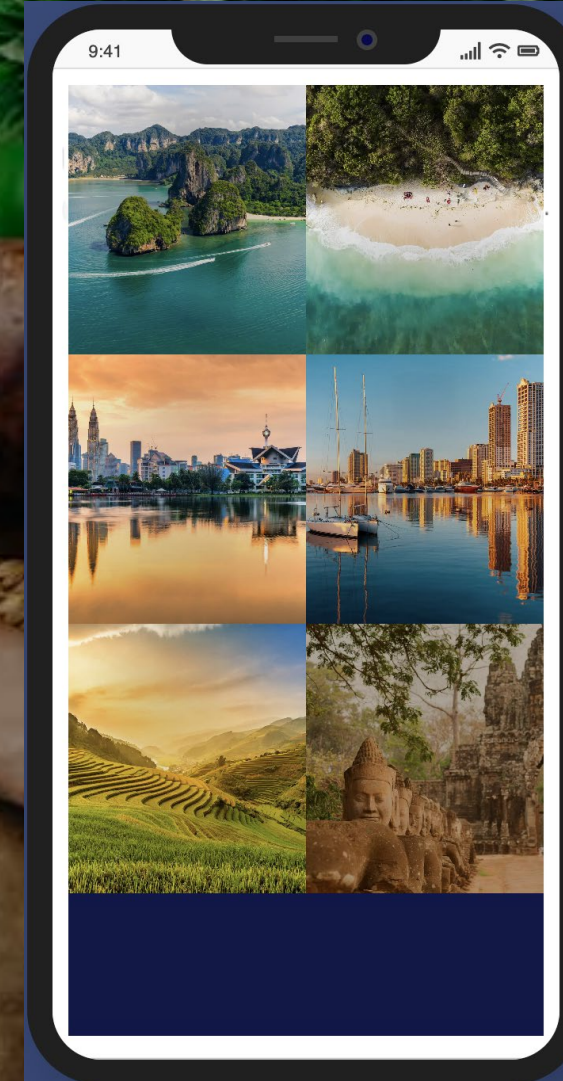
Innovative Creative Formats



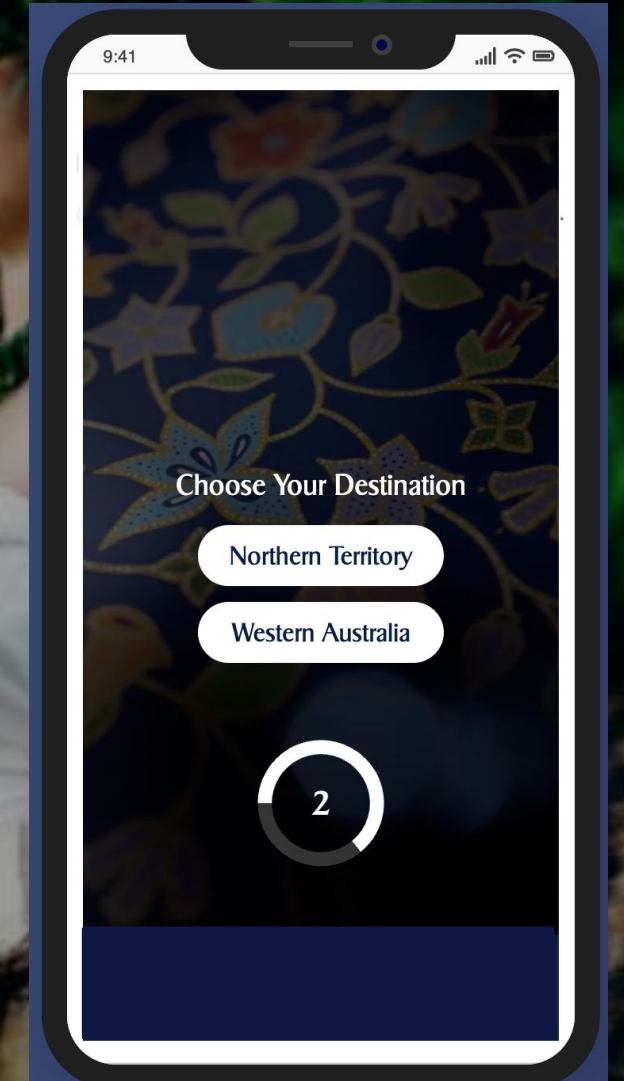
Swipe-to-Reveal



Multi-frame Video



Island Grid Format



Interactive Video

ALOHA! SALES MISSION

Q3: Trade and Press

TIMING: Early September

MARKETS: Germany / United Kingdom

- Frontline sales training in Frankfurt, Hamburg, London and Manchester
- Product manager meetings in Frankfurt and London
- Press events with hand-picked media in Hamburg and London

2026 MAJOR ACTIVITY TIMELINE

Q1 Jan - Mar

- ‘Ōlelo Hawai‘i – Consumer Campaign (Mar/Apr)
- UK British Museum Partnership (Jan-May)

Q2 Apr - Jun

- Trade Sales FAM - Pan European (Jun)
- UK Group Content Creator FAM (Apr/May)

Q3 Jul - Sept

- Aloha! Europe Sales Mission (Sept)
- Germany Co-Op Campaign (Sept/Oct)

Q4 Oct - Dec

- One Ohana, Four Stories - Consumer Campaign (Oct/Nov)
- Germany / Switzerland Group Media FAM (Sept/Oct)
- Trade Sales FAM
- Pan European (Nov)

YEAR-ROUND

Trade Training Program, Trade and Media Outreach, Press Releases (12), Event Representation, Website / Brochure Auditing, Product Manager Meetings and Trade Program Development.

WORKING TOGETHER



Support Trade and Press FAMs:

Showcase your product to the media and trade.



Join Our Sales Mission 'Ohana:

Gain visibility among Europe's most influential trade and press audiences.



Connect With Our Partners:

Coordinate with TO partners to provide the strongest rates and updates.



Ask Us Your Questions:

Have a question or, spotted a trend ? Let us know...



Share Your News!

For HTE's trade newsletter, press releases, and LinkedIn page.

JRNY **America** AWARDS 2025

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FINALISTS IN FIVE CATEGORIES

- Destination of the Year
- State Conservation Award
- US State of the Year
- Best Conservation Initiative -
Surfrider Kaua'i – Ocean Friendly Visitors Program
- New Tourism Initiative -
Recovery & Resilience Initiative (Maui)

MAHALO NUI LOA!

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