



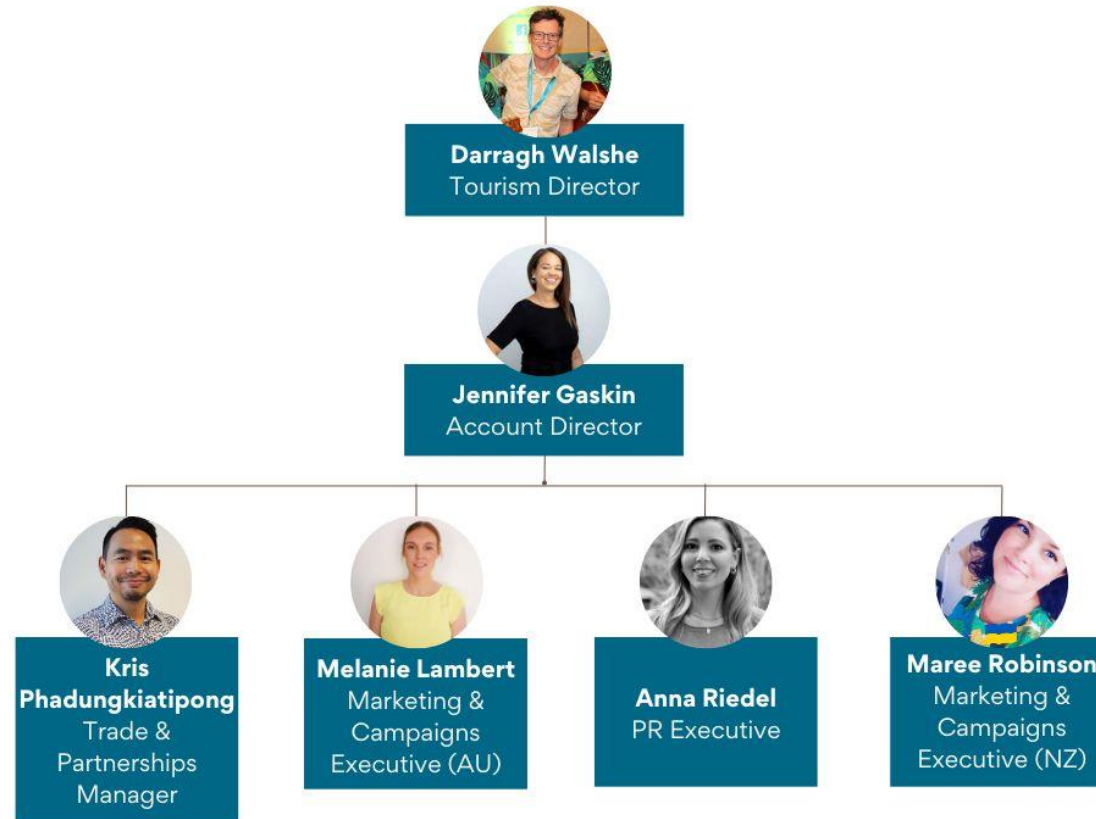
# **2023 Brand Management Plan (BMP) & Destination Management Support Plan (DMSP)**

**3 Pepeluali 2023**

3 February 2023

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Account Director, HTO

# HAWAI'I TOURISM OCEANIA TEAM



# **2023 BMP BRAND MANAGEMENT PLAN**

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# MARKET SITUATION

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# MARKET SITUATION

## General economy

- While Australia will likely avoid a recession next year, the OECD believes the Reserve Bank will hike up interest rates another 1.25 per cent
- Rising inflation, rising interest rates, hikes in fuel costs and falling wages are having an impact on many Australians and New Zealanders. However, unemployment remains low at 3.4%.
- The Australian and New Zealand dollar has remained low against the USD for much of 2022 and is currently trading at 0.66 cents. The 'Big 4' major Australian banks have predicted a slight increase for 2023, with an expected range between 65 and 70 US cents.

# MARKET SITUATION

## Outbound travel/boarder restrictions

While borders reopened in November 2021, restrictions around vaccinations and quarantine remained in place until July 2022. In addition, airline capacity is much lower than 2019, with around 45% less capacity from Australia in 2022 versus 2019.

The top five destinations visited saw a change to previous years:

### Australia

2019	2022
New Zealand	New Zealand
Indonesia	USA
USA	India
UK	UK
China	Fiji

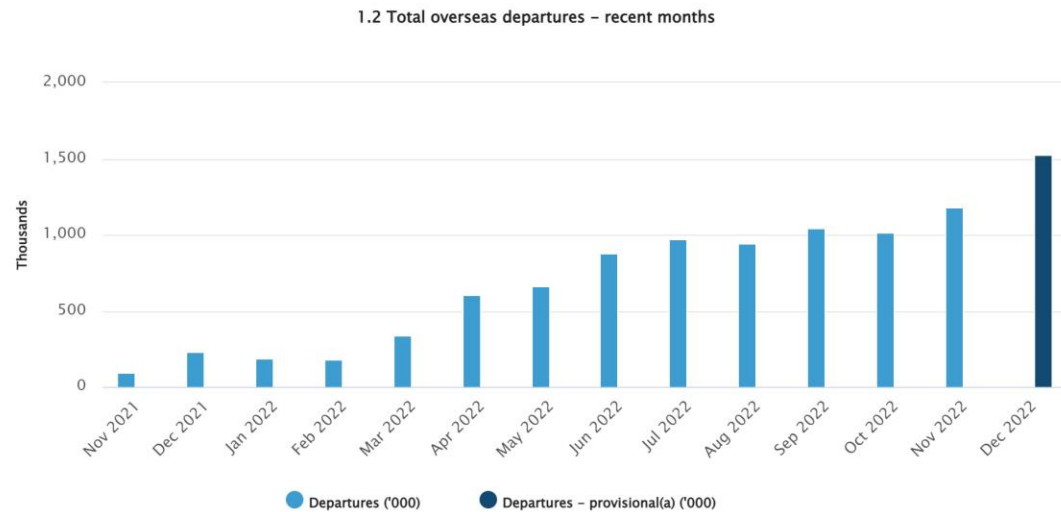
### New Zealand

2019	2022
Australia	Australia
USA	Fiji
Fiji	Cook Islands
China	UK
UK	USA

# MARKET SITUATION

## General travel sentiment

### Australia



a. Provisional data for the most recent month has not had the full quality assurance methods applied as is done for the earlier months. Provisional data will be revised in the next issue of this publication.

Source: Australian Bureau of Statistics, Overseas Arrivals and Departures, Australia November 2022

# MARKET SITUATION

## Consumer travel survey

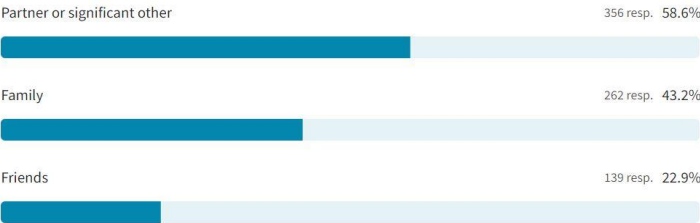
Do you intend to visit Hawai'i in the future?

307 out of 635 answered



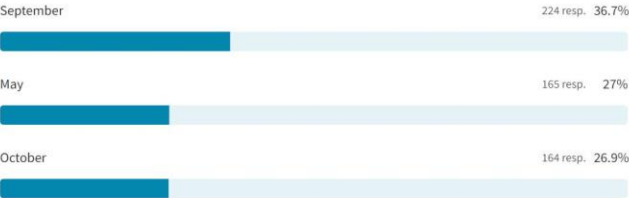
Who do you plan to travel with?

607 out of 635 answered



Which is your preferred month to travel?

610 out of 635 answered



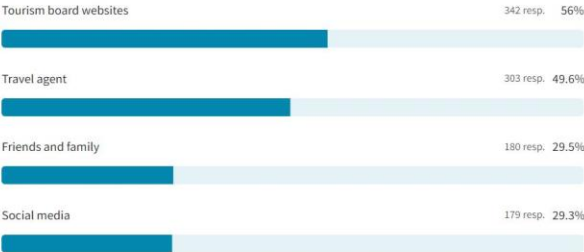
Which island(s) do you most want to visit?

614 out of 635 answered



Which of the following methods do you use to plan your future holidays?

611 out of 635 answered



Which, if any, would be reasons for not visiting Hawai'i?

587 out of 635 answered





# MARKET SITUATION

Air seat synopsis



# MARKET SITUATION

## Competitive landscape



- High awareness
- Easy and safe
- Short flight
- Large-scale post-Covid consumer campaigns
- New brand campaign and website with focus on culture



- High Awareness
- Cheaper travel
- Low-cost airlines
- Short flight
- Ease of travel



- High awareness
- Just launched multi-million dollar outdoor and digital ad campaign



- High awareness
- Most popular USA destination
- Road trips and multi-destination itineraries
- Theme parks



# TARGET AUDIENCE

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# TARGET AUDIENCE

## **Fun & Fit families**

Looking for a safe and cost-effective holiday destination during the main school holidays. The destination needs to have activities that tick the box for every member of the family. Relaxation and food and drink experiences for the adults, active soft adventure for the kids and cultural activities that provide learning and cultural immersion opportunities for everyone.

## **Key Needs**

- Hotels with room configurations or inter-connecting rooms suitable for children
- Hotels with facilities and activities for children
- Authentic, high-quality culinary experiences
- Easily accessible outdoor, soft-adventure activities
- Opportunities to connect with local culture and interact with local people

## **Examples of Key Experiences**

- Manta ray snorkel
- Lē'ahi hike
- Volcanoes National Park



# TARGET AUDIENCE

## Curious couples

While our couples' segment has traditionally skewed older, research shows that younger couples are more likely to be mindful and responsible travelers. Couples who are double income, no kids (DINKS) have successful careers and no family responsibilities and spend the most on themselves of any demographic.

## Key Needs

- Experiences are the key driver for this demographic, authentic cultural experiences, outdoor activities and unique food and drink offerings
- This demographic is likely to choose hotels that are modern and well located, preferring boutique hotels where possible.
- Sustainability and traveling responsibly is important to these couples and they want to find opportunities to give back during their vacation

## Examples of Key Experiences

- Exploring Kakaʻako
- Kilohana Plantation rum safari
- Gunstock ranch ATV and tree planting
- Community festivals and events



# 2023 STRATEGY

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# STRATEGY

## Core branding message for 2023



### Connection

By delving deeper into the relationships Hawaiians have with the land, the ocean and their culture, we'll be giving visitors a deeper understanding of why the Hawaiian Islands are so special and how visitors also play a role in their protection and regeneration.



### Culture

The spirit of aloha, cherished traditions, history, and culture are what make Hawai'i unique. Our activities aim to build a deeper connection between the visitor and the Hawaiian Islands by sharing these deep-rooted cultural traditions.



### Culinary

Post-Covid, food and drink is emerging as one of the strongest trends in travel. Travelers are seeking culinary adventures to sample authentic ingredients, cuisines and drinks, and to dive deep into the kaleidoscope of flavors, textures and stories of the people, process and place that go into them.

# KEY CAMPAIGNS/PROGRAMS

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# KEY CAMPAIGNS/PROGRAMS

## TODAY Show

In March 2023 we will work with the TODAY Show to film their live weather crosses on O'ahu and Maui, presented by weatherman Tim Davies. TODAY is one of Australia's longest running and highest rating breakfast TV programs. It airs from 5.30am to 9am weekdays on the Nine Network and has an estimated 170,000-185,000 viewers nationally around Australia each day.



# KEY CAMPAIGNS/PROGRAMS

## Aloha Down Under

Multi-city roadshow incorporating product and destination training. While aiming at product/ conversion, it will overlay key brand messaging and incorporate cultural practitioners and entertainment.

### Objectives

Increase brand awareness with travel trade

- Ensure travel agents have the most up to date information to advise tier clients
- Assist Hawai'i trade partners in building relationships with Australian and New Zealand travel agents and key trade partners



# KEY CAMPAIGNS/PROGRAMS

## Month of Lei

We'll use Lei Day and the Month of Lei as an opportunity to bring each distinct island personality to life. We will do this through a series of trade training events with the Island Chapters in Sydney, Brisbane, Melbourne and Auckland. We will also launch an incentive famil campaign through trade media, giving five agents who book multi-island itineraries the chance to win a famil to Hawai'i.

Month of Lei will also incorporate consumer elements, including social media content and an Expedia co-op campaign.



# KEY CAMPAIGNS/PROGRAMS

## **Accessible Tourism Guide**

Creating and sharing content that promotes accessible and inclusive travel is about more than ‘just doing the right thing’. In Australia, 1 in 5 people live with a disability, and according to a UTS survey from 2017 there are more than 1 billion people living with a disability worldwide.

People travelling with a disability tend to research more, stay longer and travel in larger parties. So, there is an economic multiplier effect of attracting and catering to the accessible travel market.

The Hawaiian Islands is a good destination for inclusive travel from Oceania due to the direct flight connectivity, availability of inclusive hotel rooms and, the array of tour operators catering to those with additional needs.

# **2023 DMSP DESTINATION MANAGEMENT SUPPORT PLAN**

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# 2023 STRATEGY

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# STRATEGY

This year we'll pay particular attention to destination management. HTA seeks to attract lifetime value, positive-impact, mindful travelers and all our activity is in line with this, however we will also embark on some projects with DMAP specifically in mind.

Our destination management strategy is based around ensuring travelers from Oceania are equipped with the necessary information to empower them to make the best and most responsible choices when traveling to the Hawaiian Islands. And, that when they return, they spread that message to other future travelers.

## Key DMAP Action Items

- Made in Hawai'i
- Cultural festivals and events
  - Hawai'i Food and Wine Festival
  - Duke's Oceanfest
  - Merrie Monarch Festival
  - Lei Day
- Voluntourism
- Agri-tourism
- Protect and preserve culturally-significant places and tourism hotspots



# KEY CAMPAIGNS/PROGRAMS

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# KEY CAMPAIGNS/PROGRAMS

## Connections campaign

Hawaii stands out against other destinations because the heritage, culture and spirit of aloha epitomize what it means to live harmoniously with the land. To communicate this philosophy, we will work on a series of short videos that specifically highlight the people of Hawai'i, their connection to the land, ocean and mountains and how the visitor can experience and be a part of this special bond.

We will use talent from Australia and New Zealand who will play the part of 'the visitor'. They will be shown taking part in tourism experiences that have cultural significance, giving us the opportunity to delve deeper into Hawaiian culture and the opportunity to communicate many of the DMAP action points.

The videos will be housed on a micro site which will also have written articles, suggested itineraries and destination information. All Hawaiian Islands will be a part of this project and there will be a special focus on responsible tourism.



# KEY CAMPAIGNS/PROGRAMS

## Sea Cleaners

When conceived by HTO four years ago, the intent of the Sea Cleaners initiative was not linked to, or influenced by, traditional tourism goals such as increasing tourism numbers. To do so would have gone against the initiative's ethos and purpose. The initiative was about doing something that was right (or pono) for a special part of our planet that Hawai'i shares with other Pacific neighbors. It was about creating a powerful force of change, built on connections, culture, environment and young leaders who care.

Following the successful 2022 Sea Cleaners initiative, next year we plan to include all Pacific Rim markets (NZ, Australia, Japan, China, Korea, USA and Canada) HTO looks forward to partnering HTA on an even more expanded initiative. One that welcomes all the Pacific Rim GMT's to be part of the special connection we all have via the currents, tides and the footsteps of the original voyagers.



# KEY CAMPAIGNS/PROGRAMS

## **Agri-tourism trade project**

This year, in line with the DMAP action points and our key themes of connection, culture and culinary we will coordinate an agritourism famil. The objective of this will be to introduce the Hawaiian Islands as an agritourism destination and to identify and work with specialist tour operators to develop agritourism product for sale in market.

## **Made in Hawai'i project**

This project focusses on promoting Hawai'i made products in Australia and New Zealand. Working alongside the US Consulate and the Hawaiian Department for Agriculture and trade, the objective is to have a selection of Hawai'i made products on sale in Oceania.



# KEY CAMPAIGNS/PROGRAMS

## Time Out/SXSW

This year, we will work with Time Out on a large-scale project that incorporates content, paid media and an event. The concept would be to create multiple pieces of content that would appeal to our couple's target audience segment, primarily around the key themes of culinary and culture.

We will also work with Time Out to create a guide to Hawai'i's best agri-tourism offerings. As a result of downloading the guide, consumers would go into the draw to attend an exclusive Hawaiian Islands inspired event in Sydney. The event would be a celebration of Hawai'i's food and culture, giving consumers a taste of what they can experience across the islands. This would gain significant media exposure and we would encourage travel bookings by working with a CTA partner.

Ideally, we would time this close to Aloha Down Under so that we could utilize the same cultural practitioners. Additionally, we would incorporate Made in Hawai'i messaging by using locally made products at the event and profiling local businesses.



# Q1 ACTIVITIES

- Newcastle Travel Expo
- Flight Centre co-op
- We Are Explorers campaign
- MyHawaii co-op
- Travel Associates showcase
- Ohana updates AU&NZ
- Visit USA roadshow
- Brand USA B2B
- Ocean Film Festival sponsorship
- TODAY show
- IMM
- Consumer campaign “connections”
- ADU venues and collateral
- Māori TV project





# NORTH SHORE ECOTOURS

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# MĀLAMA LOKO EA



# KEY PERFORMANCE INDICATORS

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# KEY PERFORMANCE INDICATORS



# PARTNERSHIP OPPORTUNITIES

[hawaii tourism authority.org/what-we-do/partnership-opportunities/](https://hawaii tourism authority.org/what-we-do/partnership-opportunities/)

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# PARTNERSHIP OPPORTUNITIES

<b>Media Market Place</b>	Feb 2023	HTO's annual media event is now established as the industry's leading event for the media to meet travel and tourism brands. Exhibitors each enjoy a dedicated branded table where they can meet top travel journalists, editors, and broadcasters to discuss their news, events, and developments.		Partners' travel agency information for travel journalists and media.  HTO contact: Anna Riedel <a href="mailto:Ariedel@hawaiiitourism.com.au">Ariedel@hawaiiitourism.com.au</a>
<b>Aloha Down Under</b>	4-11 Sep 2023	HTO's annual roadshow visiting Australia and New Zealand incorporating agent workshops, a joint B2B trade and media event and networking opportunities.  Limited spaces are available. For more information visit <a href="http://www.alohadownunder.com.au">www.alohadownunder.com.au</a> .  EOI will be sent out to partners in February 2023.	Auckland, Christchurch, Melbourne, Brisbane and Sydney	Participation Fee - approx. AU\$5500 + GST & travel costs.  For more information contact:  <a href="mailto:kphadung@hawaiiitourism.com.au">kphadung@hawaiiitourism.com.au</a> <a href="mailto:jgaskin@hawaiiitourism.com.au">jgaskin@hawaiiitourism.com.au</a> <a href="mailto:dwalsh@hawaiiitourism.co.nz">dwalsh@hawaiiitourism.co.nz</a>
<b>Sea Cleaners</b>	TBC Sep 2023	In commemorating International Coastal Cleanup Day, HTO will partner with Sea Cleaners, a non-profit organization, Hawaiian Airlines, Visitors Bureaus and Sustainable Coastlines Hawai'i to raise the awareness about the impact of plastics in the ocean and to engage with local community in various volunteerism on the Hawaiian Islands.	TBC	In-kind support for accommodation and ground activities.  HTO contact: <a href="mailto:dwalsh@hawaiiitourism.co.nz">dwalsh@hawaiiitourism.co.nz</a>

<b>Agri Tourism Famil</b>	TBC April 2023	This will be an opportunity to showcase Agri-tourism in Hawai'i with the objective of developing products for new trade partners.	Multi-Islands	In-kind support as accommodation, transportations, activities, and meals  HTO contact: <a href="mailto:jgaskin@hawaiiitourism.com.au">jgaskin@hawaiiitourism.com.au</a>
<b>Trade Travel Agents Famil</b>	TBC 2023	Trade agents <a href="#">famil</a> will be created in conjunction with HTO Month of Lei campaign to promote Hawaiian Islands & Mālama Hawai'i Program among AU & NZ agents. Our main objective is to highlight Mālama Hawai'i Program, historical and educational activities for the agents that are well versed on Hawaii products and activities.  HTO will also take this opportunity to showcase newly renovated properties and new experiences across the Hawaiian Islands.	Multi-Islands	In-kind support for accommodation, and ground activities.  HTO contact: <a href="mailto:kphadung@hawaiiitourism.com.au">kphadung@hawaiiitourism.com.au</a>
<b>Media Famil</b>	Q3 2023	HTO will work with Australian/NZ travel media to support a range of travel journalists throughout the year and partners will have the opportunity to get involved.	Multi-Islands	In-kind support as accommodations, transportations, activities, and meals  HTO contact: <a href="mailto:Ariedel@hawaiiitourism.com.au">Ariedel@hawaiiitourism.com.au</a>
<b>Industry discounts for travel agents</b>	Year round	HTO receives numerous inquiries regarding industry discounts for travel agents' personal holidays to Hawai'i.  This is a great self-famil opportunity for you to showcase your product and service to Australian and New Zealand travel agents or wholesale reservations staff.  Please note, HTO will make mention that proof of ID (letter of employment on company stationery) and/or IATA number is required for all reservation requests. It will be clearly outlined that these rates are subject to availability and blackout dates, however we ask that you also outline your own terms and conditions.	All islands	If you have a year-round industry discount for Hawaii selling agents available for 2023, or if you have a dedicated person that can handle industry requests, please let us know the details by Jan 31, 2023, by filling in the attached Travel Trade Discounts form:  HTO will compile these and promote these year-round industry discounts via our database and during our agent training.  HTO contact: <a href="mailto:kphadung@hawaiiitourism.com.au">kphadung@hawaiiitourism.com.au</a>

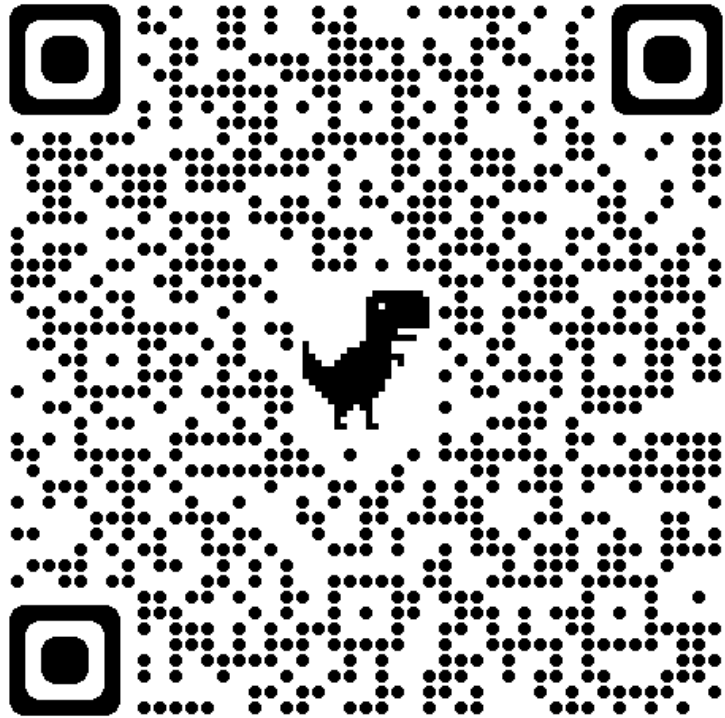
# PARTNERSHIP OPPORTUNITIES

<b>Month of Lei Destination Training</b>	From May & Year & Round TBC	Part of the Month of May – Month of Lei showcase which encompasses consumer and trade. HTO and IC's will partner in in-depth destination training to travel agents. As well as additional PR opportunities.	Sydney, Melbourne, & Auckland	IC specific, although industry may want to contribute prizes  HTO contact: <a href="mailto:dwalshe@hawaiiitourism.co.nz">dwalshe@hawaiiitourism.co.nz</a>
<b>Travel &amp; Consumer professionals e-newsletter</b>	Quarterly	Communicate to HTO's Australian and New Zealand travel trade database (3,280+).  Monthly – Deadline by 12 of each month.	Online	Free opportunity.  If you would like to be featured, please send a paragraph of a copy (max 50 words), image and web link to Mel.  HTO contact: <a href="mailto:mlambert@hawaiiitourism.com.au">mlambert@hawaiiitourism.com.au</a>
<b>Travel Agent Training Program/Webinars</b>	Year-round	HTO undertakes regular training sessions with travel agents across Australia and New Zealand.	Australia & New Zealand	Please send through industry updates – eg new/changed product; general island updates.  HTO contact: <a href="mailto:kphadung@hawaiiitourism.com.au">kphadung@hawaiiitourism.com.au</a>
<b>Aloha Fridays Trade feature: Travel Weekly, KarryOn &amp; Travel Today</b>	Year round	HTO in conjunction with Hawaiian Airlines sponsor a Hawaii section in popular travel trade website/publications Travel Weekly (AU) & Travel Today (NZ). The features bring destination and trade news to over 15,000 travel industry subscribers. Partners will have the opportunity to submit updates and news.	Australia & New Zealand	Free Opportunity. If you would like to be featured, please send Info and images to <a href="mailto:jgaskin@hawaiiitourism.com.au">jgaskin@hawaiiitourism.com.au</a> or <a href="mailto:dwalshe@hawaiiitourism.co.nz">dwalshe@hawaiiitourism.co.nz</a> Link to Aloha Friday Pages: <a href="http://www.travelweekly.com.au/tag/aloha-down-under/">http://www.travelweekly.com.au/tag/aloha-down-under/</a> <a href="http://www.travfiles.co.nz/region/hawaii/">http://www.travfiles.co.nz/region/hawaii/</a>
<b>Hawaii Tourism LinkedIn</b>	Year round	HTO will develop a LinkedIn profile to provide updates and destination information to the travel industry. We're looking to you for news, events and updates we can communicate to our trade partners.	Australia & New Zealand	Free Opportunity. If you would like to be featured.  HTO contact: <a href="mailto:jgaskin@hawaiiitourism.com.au">jgaskin@hawaiiitourism.com.au</a>

<b>Visiting media program</b>	Year round	Throughout the year, HTO hosts a <u>number of</u> media, including group and individual press trips, influencers and major TV filming opportunities.  HTO also provides limited support to media and influencers not deemed "Tier One".	All islands	In-kind support. HTO is also looking for year-round media rates and inclusions to offer non-supported media. For further information contact
<b>Media releases</b>	Year round	HTO sends out multiple press releases and media updates and undertakes media calls throughout the year. Partners have <u>the opportunity</u> to provide their own press releases and product updates for inclusion	n/a	No cost. Please send your press releases and updates to <u>HTO</u> contact:  <a href="mailto:Ariedel@hawaiiitourism.com.au">Ariedel@hawaiiitourism.com.au</a> <a href="mailto:dwalshe@hawaiiitourism.co.nz">dwalshe@hawaiiitourism.co.nz</a>
<b>HTO Blog and social networks</b>	Year round	HTO reach out to past, present and potential Australian and New Zealand visitors to <u>Hawai'i</u> through our Facebook, Twitter and Instagram handles.  Australia <a href="https://www.facebook.com/gohawaii.au">www.facebook.com/gohawaii.au</a> <a href="https://www.twitter.com/gohawaii.au">www.twitter.com/gohawaii.au</a> <a href="https://www.instagram.com/gohawaii.au">www.instagram.com/gohawaii.au</a> New Zealand <a href="https://www.facebook.com/goHawaiiNZ">www.facebook.com/goHawaiiNZ</a> <a href="https://www.instagram.com/goHawaiiNZ">www.instagram.com/goHawaiiNZ</a>	n/a	Notify HTO of your own official accounts, follow us and engage online by using our social media handles.  HTO contact: <a href="mailto:mlambert@hawaiiitourism.com.au">mlambert@hawaiiitourism.com.au</a>

# OCEANIA FACT SHEET

[hawaiitourismauthority.org/research/monthly-visitor-statistics/](http://hawaiitourismauthority.org/research/monthly-visitor-statistics/)



**MAHALO!**

