



2018
**GLOBAL
TOURISM
SUMMIT**

HAWAII TOURISM
AUTHORITY

*Charting the
Course*

#GTSHAWAII



OCTOBER 1-3
HONOLULU, HAWAII



2018 Oceania market review

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Team Hawai'i

HTO Australia Team (Sydney)



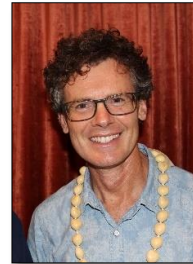
Giselle Radulovic
Country Manager



Charis Ricafuente
Sr. Marketing Manager



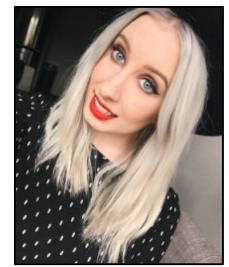
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Trade Executive



Darragh Walshe
Country Manager



Megan Hornblow
Account Manager



Rhiannon Williams
Social Media



Kritsada Phadungkiatipong
MCI Manager



Madeline Atkins
PR Executive

The Walshe Group



Jacqui Walshe
Managing Director

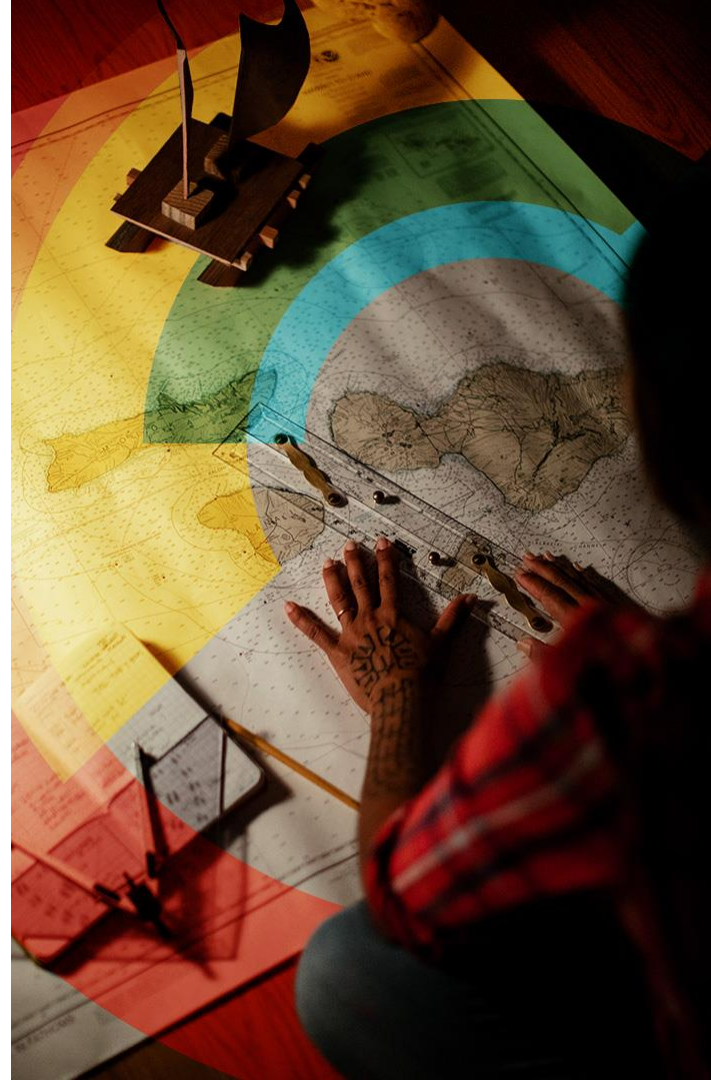
HTA (Honolulu)



Chris Sadayasu
Tourism Brand Manager

Session overview

- ◆ Review of 2018
- ◆ Market Overview
- ◆ Looking ahead to 2019



Market Conditions

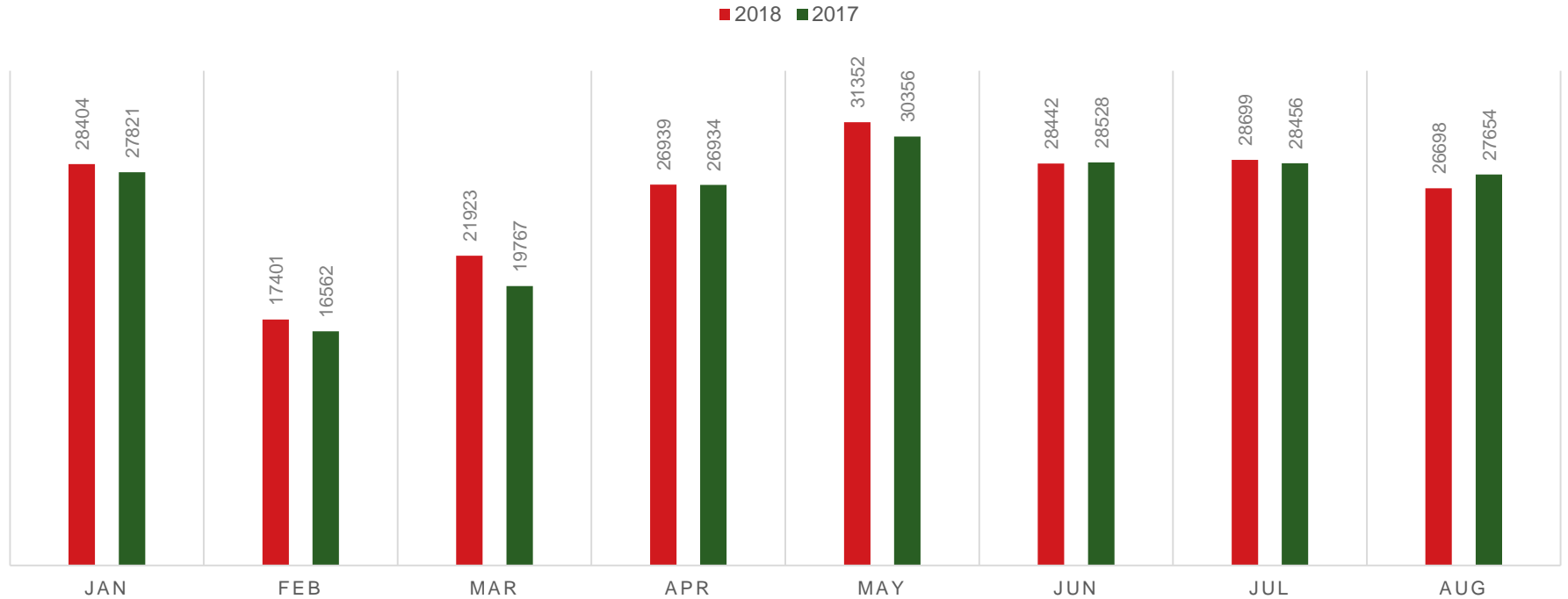
- Arrivals
- Airlift
- Economic Environment



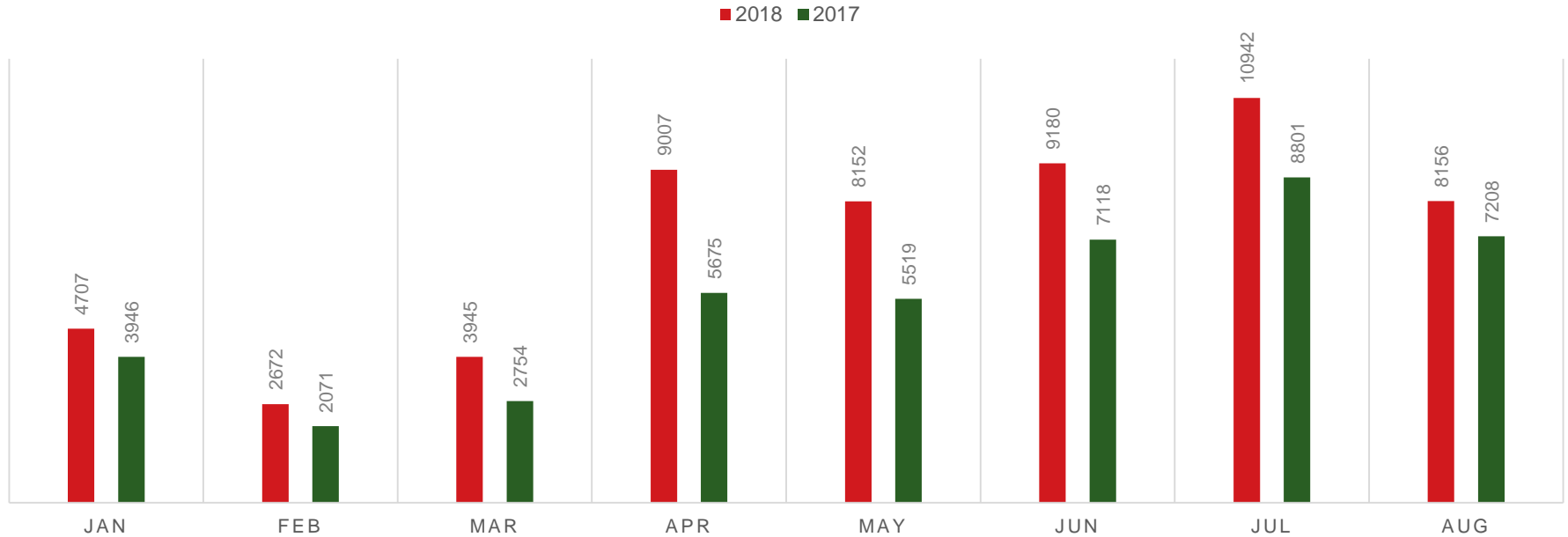
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AUSSIES VISITING HAWAI'I (JAN-AUG 2018)



KIWIS VISITING HAWAI'I (JAN-AUG 2018)



Annual arrivals

| Visitors | Australia |
|-------------------|---------------------|
| 2017 | 324,564 |
| Jan – Aug 2018 | 209,858 (+1.8% YOY) |
| Av length of stay | 9.67 days |

| Visitors | New Zealand |
|-------------------|---------------------|
| 2017 | 70,799 |
| Jan – Aug 2018 | 56,762 (+31.7% YOY) |
| Av length of stay | 9.31 days |

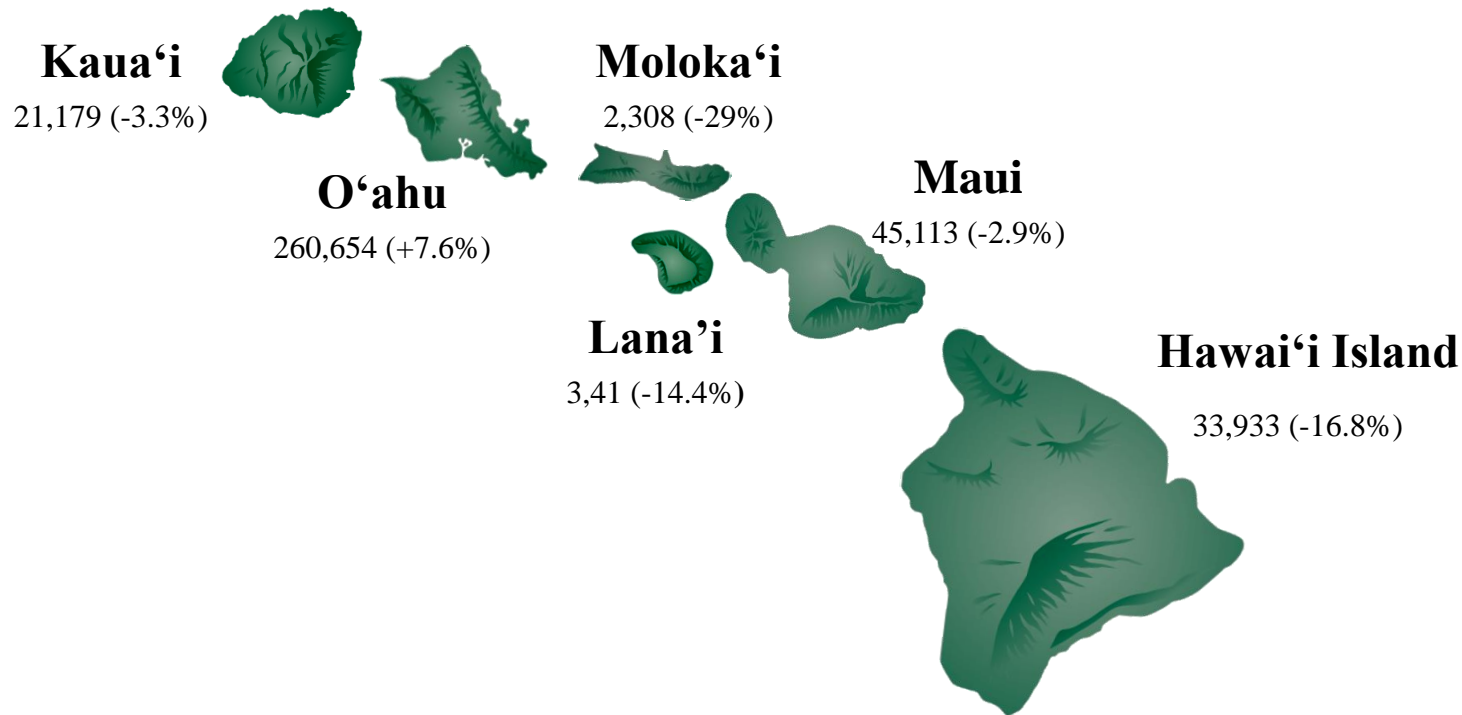
Oceania expenditure

January – Aug 2018: \$676.2 million

Forecast 2018: \$1,062.1 million **+ 3.6%**



Year to date arrivals Oceania – January to Aug



Airlift

| | 2017 | 2018 Estimated | % Change |
|-----------|---------|----------------|----------|
| Auckland | 104,932 | 155,756 | +48.4 |
| Sydney | 273,688 | 270,934 | -1.0 |
| Melbourne | 60,300 | 58,960 | -2.2 |
| Brisbane | 44,202 | 44,202 | 0.0 |



Oceania economic environment

Australia

- ◆ AU\$ decline throughout the year
- ◆ Affected by slow down in US and global economy
- ◆ Economy solid; consumer confidence is up

New Zealand

- ◆ Economy solid
- ◆ NZ\$ has slipped, at lower end of acceptable range



Visitor profile



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Leisure – who is visiting Hawai'i



33.8%

AS A COUPLE
(+3.1%)



28.7%

OTHER FAMILY OR FAMILY &
FRIENDS (+3.7%)



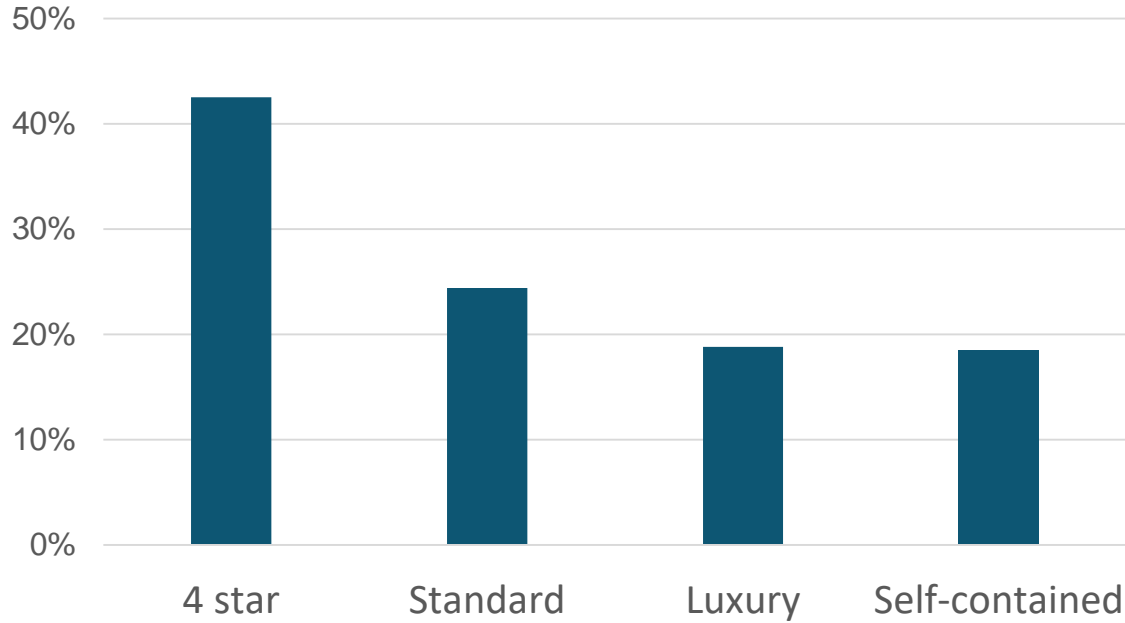
22.3%

FAMILY WITH CHILDREN
(down -4.5%)

Average age: 45 years old



Where are we staying?



Why Hawai'i?



R&R



Shopping



Food



Beach



How do we book?



58.2%

Travel agent



38.3%

Airline



33.6%

Direct



25.5%

OTA





Key programs 2019

- ◆ Strategic objectives
- ◆ Consumer
- ◆ Trade
- ◆ Promotions and communications
- ◆ MCI



Strategic objectives

- ◆ Two major integrated campaign periods incorporating full marketing mix
- ◆ Maintain an 'Always On' consumer and trade engagement strategy
- ◆ Reinforce a strong brand position through authentic story telling
- ◆ Leverage strong industry partnerships



Consumer strategies

- ◆ **Romance:** Major integrated campaign for one of our main markets
- ◆ **Multi-island Travel:** Multi-channel campaign during a key booking period
- ◆ **Short Break/Stopover:** Shopping/single island visits
- ◆ **Sports & Festivals:** Promote signature events



Trade strategies

Trade education

- ◆ Tradeshows – Month of Lei, Aloha Down Under, Visit USA
- ◆ Dedicated online training modules
- ◆ Specialist Famils

Co-operative campaigns

- ◆ Experiential & multi-island
- ◆ Creative, multi-channel and digital
- ◆ Aligned with key strategic objectives and key campaign periods



MCI strategies

Partnership Development

- ◆ PCOs, Corporate Meeting Planners, Island Chapters, Airlines
- ◆ HCC | HVCB

NEW Incentive Program

- ◆ Increase room nights
- ◆ Hawai'i top of mind

Increased Sales Activity

- ◆ Dedicated famils
- ◆ Tradeshows – AIME, Get Global, PAICE, EABE



Promotions and communications strategies

Broadcast Initiatives

- ◆ Helloworld Travel Show
- ◆ Prime time lifestyle
- ◆ Morning news shows

Media Relations

- ◆ Visiting Journalist Program
- ◆ Group Media Famil
- ◆ Press releases

Promotions

- ◆ Month of Lei
- ◆ Aloha Down Under
- ◆ Support of campaign themes

Digital communications

- ◆ Subscriber database 123k+
- ◆ Facebook: 114k+ & Instagram: 25.9k+
- ◆ gohawaii.com/au Blog





Our Top 5

- ◆ Multi-channel integrated campaigns
- ◆ Major PR consumer
- ◆ Digital and social
- ◆ Responsible tourism
- ◆ MCI relationships



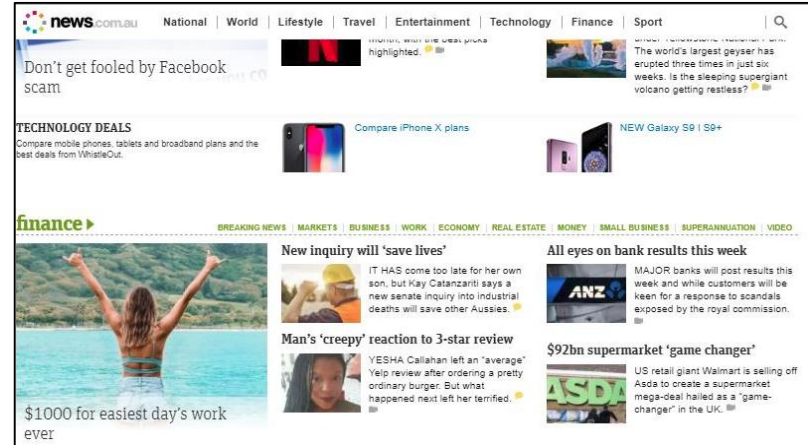
Multi-channel integrated campaign

- Focus on key traveller markets and themes
- Increase partner opportunities in travel and other sectors
- Leverage combined investment to increase media, PR, digital reach
- Shoulder and non peak travel times
- Increase multi-island visitation



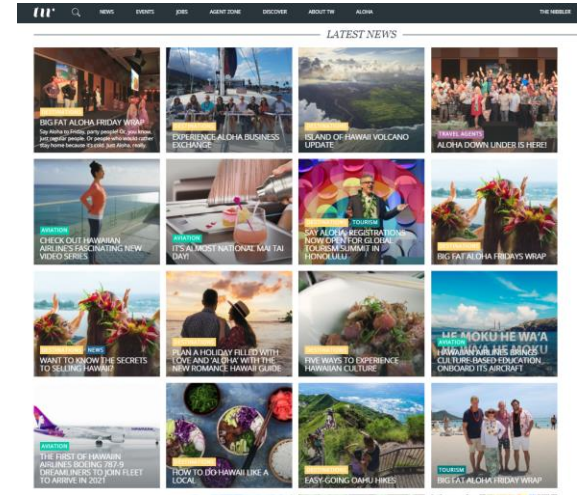
Major consumer PR

- Seek major TV production opportunities
- Promote key themes and niche experiences – new audiences
- Integrate with Trade Co-op Campaigns



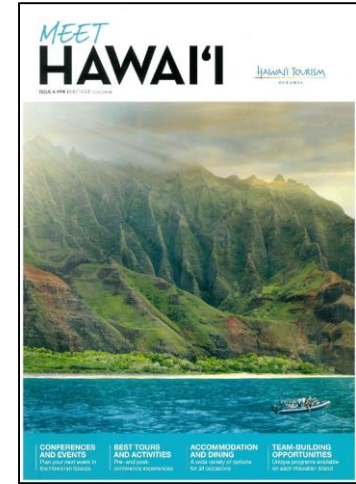
Digital and social presence

- Social media to promote major activities
- Gohawaii.com/au/nz campaign pages
- Oceania Blog on gohawaii.com
- Promote Festivals and Events
- Utilise UGC from influencers and fans
- Paid social activity
- Grow Facebook, Instagram, Twitter
- Aloha Fridays – Travel Trade



MCI relationships

- Build partnerships and profile of HTO MCI support
- Increase sales activity and develop corporate market
- NEW agent/planner incentive to increase room nights



Responsible tourism

- Sea Cleaners NZ Exchange Program
- Promote voluntourism opportunities, with unique cultural experiences
- MCI / Corporate groups
- PR/press messaging





SEA CLEANERS

The HAWAIIAN ISLANDS
COURTYARD
Marriott
OAHU NORTH SHORE

SEA CLEANERS

Questions?

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