



# FALL TOURISM UPDATE

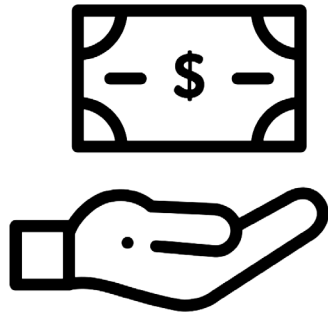
Darragh Walshe, Giselle Radulovic & Charis Ricafuente  
New Zealand/ Australia

# MARKET CONDITIONS

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# MARKET CONDITIONS - AUSTRALIA

## ECONOMY

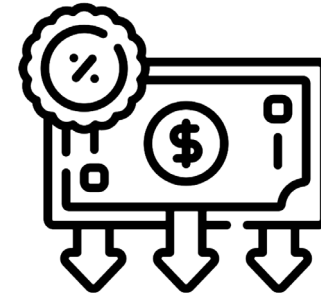


Personal tax cuts and low interest rates stimulating discretionary spending



AUD\$.068 = USD\$1

10 year low and may fall further



GDP 2.75%

GDP growth has slowed to 2.75% for 2019

# MARKET CONDITIONS - AUSTRALIA

## TRENDS

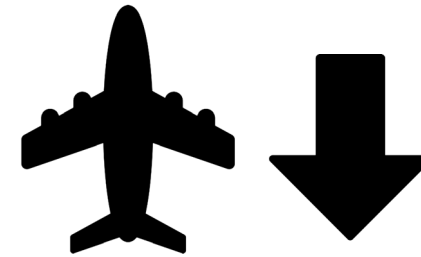


Domestic tourism  
increase in 2019



Seniors (55+ yrs)  
emerging

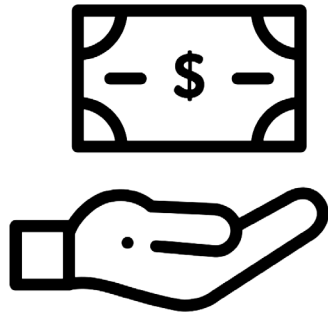
## AIRLIFT



- Drop in capacity between 2018/ 2019
- Cancellations by Jetstar reduced availability in first 6 months

# MARKET CONDITIONS – NEW ZEALAND

## ECONOMY

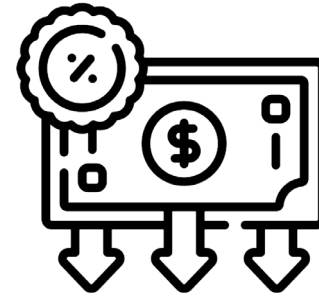


Record economic surplus,  
yet business confidence  
low due to slow growth



AUD\$.063 = USD\$1

Lowest point in a decade  
and expected to hover  
around this level



GDP STEADY

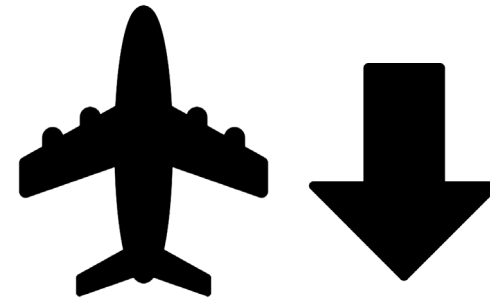
# MARKET CONDITIONS NEW ZEALAND

## TRENDS



- Subject to global market impacts
- Outbound tourism continues to grow
- Trend towards shorter but more frequent holidays

## AIRLIFT



- 2018 - a unique situation of almost 50,000 new air-seats flooding the market
- 2019 and beyond - a return to normal capacity
- Focus on increased loads and yield

# TRAVEL TRENDS

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# TRAVEL TRENDS

**BUSINESS**

## Helloworld selling \$399 return fares to Hawaii on Air New Zealand as price war with Hawaiian Airlines gets red hot

14 Feb, 2019 12:03am 3 minutes to read



Legacy of 2018 increases in airlift to Hawai'i and airline competition created a change in perception and customer mix



HTO working with trade partners to focus on the higher yielding, experiential customer



# TRAVEL TRENDS

## General Travel Trends:

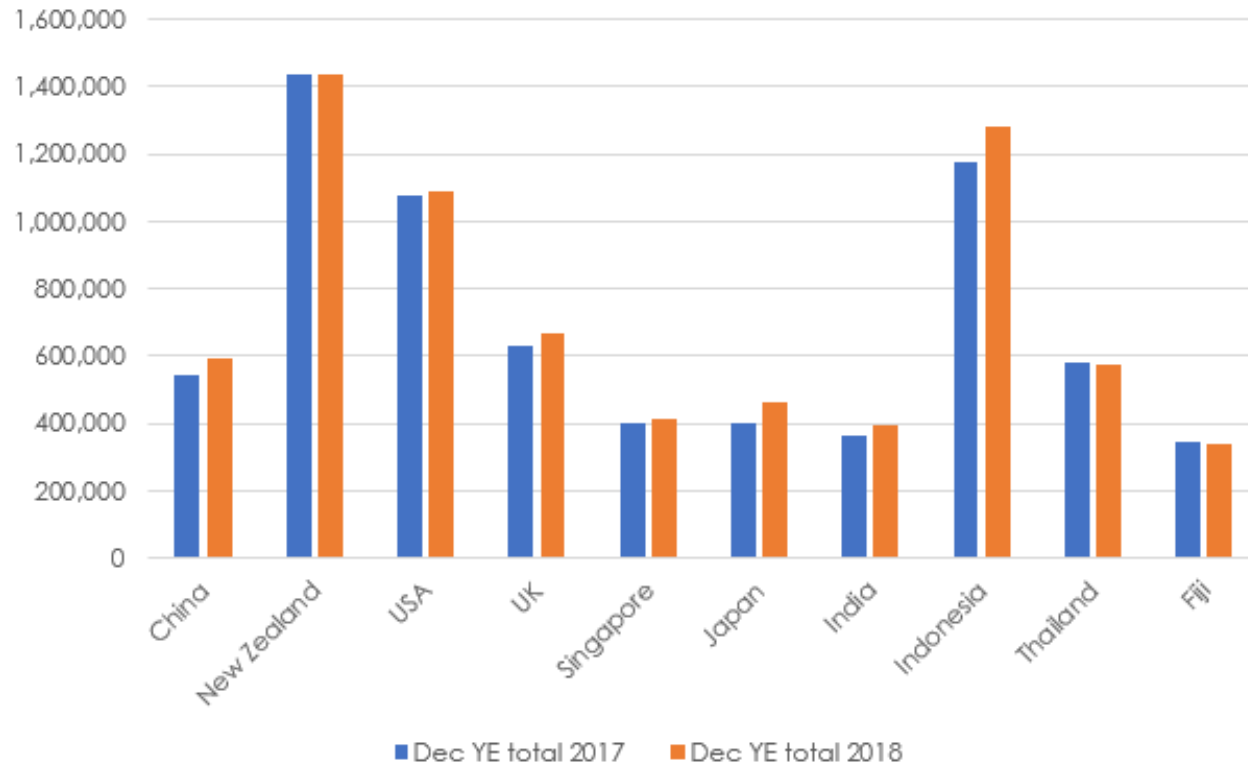
- Hawai'i has strong emotional equity and brand momentum compared to competitor destinations – Fiji, Bali, Thailand
- More than a tropical getaway - associated with awe inspiring nature, adventure and a family and friends destination
- Path to purchase is not linear. Consumers research across multiple digital channels. Still a preference to book via travel agent or OTA



Source: My Travel Research "Powering the next phase of growth for Hawai'i in the Australian market" Jan 2019

# TRAVEL TRENDS - AUSTRALIA

Australian Outbound Travel in 2017/ 2018



Source: Australian Bureau of Statistics

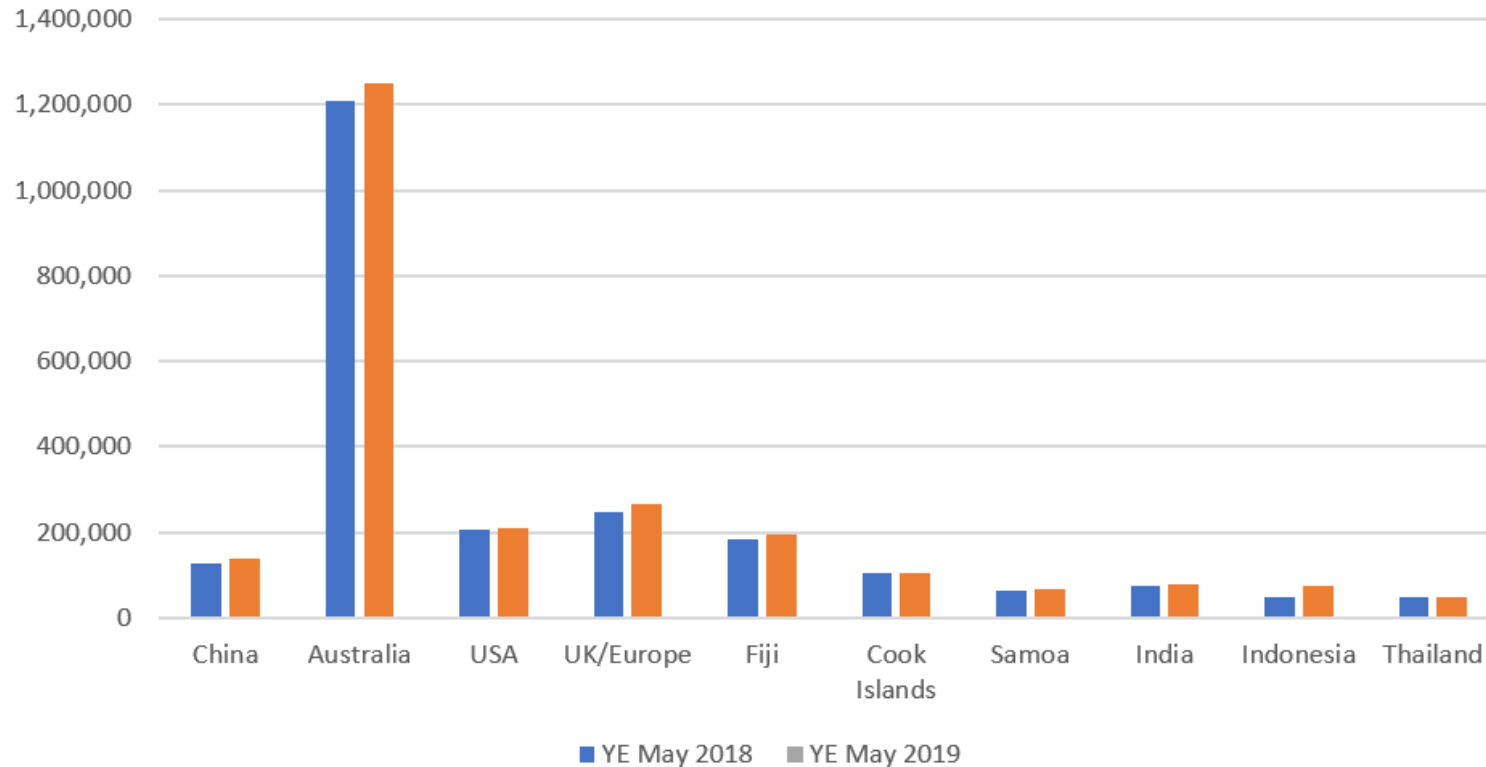
Top 5 USA destinations - Australian Inbound Travel 2018

State	%
California	44.54%
The Hawaiian Islands	27.18%
New York	22.93%
Nevada	19.12%
Florida	11.12%

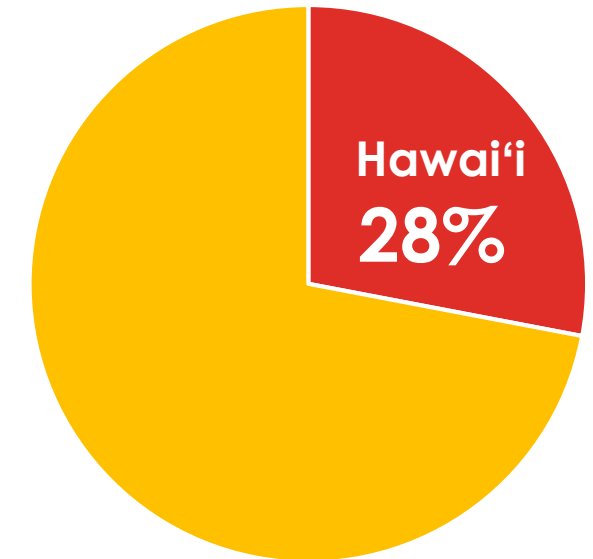
Source: US Dept of Commerce

# TRAVEL TRENDS – NEW ZEALAND

## New Zealand Outbound Travel



## New Zealand inbound travel to the U.S 2018



↑ 15%

# TARGET AUDIENCE

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# TARGET AUDIENCE



**29%**  
AS A COUPLE



**24%**  
FAMILY WITH  
CHILDREN



**20%**  
OTHER FAMILY OR  
FAMILY & FRIENDS

**Average age: 36 years old**

# TARGET AUDIENCE



## AUSTRALIA

Eastern Seaboard: Sydney, Brisbane and Melbourne and major regional centres



## NEW ZEALAND

Auckland, Wellington, Waikato/Bay of Plenty, Christchurch

# TARGET AUDIENCE

## HIGH-VALUE TRAVELERS



### **AUTHENTIC EXPERIENCERS\***

- Tangible engagement
- History and culture
- Educated
- Mature traveller



### **CULTURAL EXPLORERS\***

- Learning and discovery
- Local immersion
- Educated
- Families and couples





# CONSUMER STRATEGY

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# CONSUMER STRATEGY

## Six Hawaiian Islands, Infinite Experiences



# CONSUMER STRATEGY

General focus:

- Experience led strategy
- Focus on multi-island dispersal
- Highlighting Hawai'i's outstanding nature
- Branded content across HTO channels
- Multi channel integrated campaigns



# CONSUMER STRATEGY

## Public Relations:

- Media famils aligned to brand themes
- Key story angles across mainstream print and digital channels
- National broadcast opportunities including television and radio



# CONSUMER STRATEGY



120,000 fans



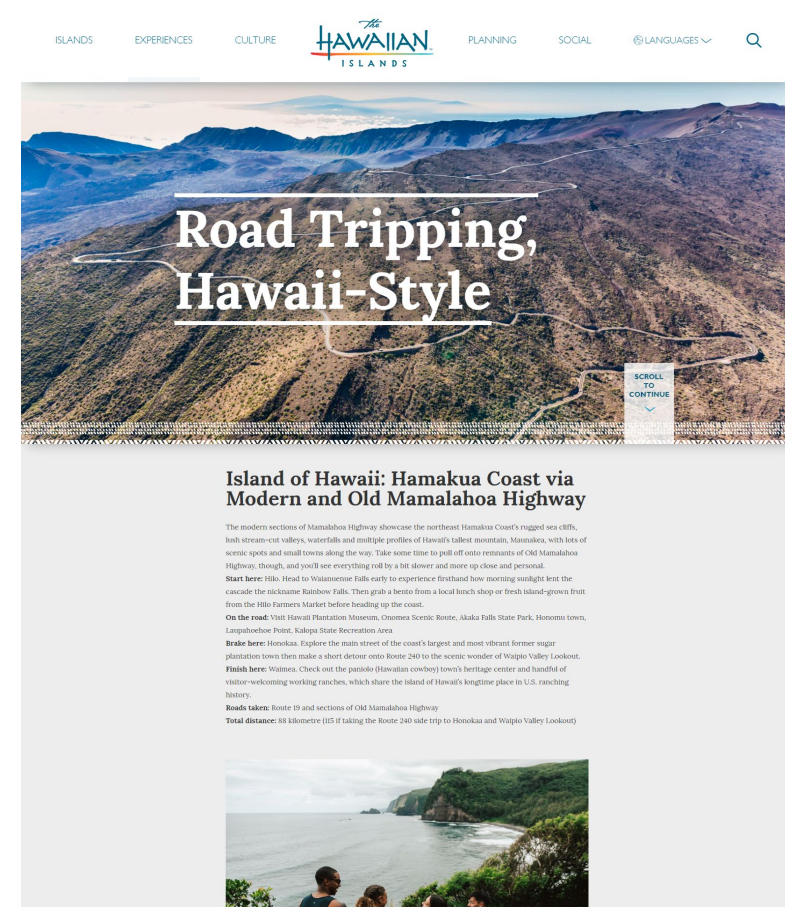
29,000 followers



170,000 subscribers



2 blogs per month

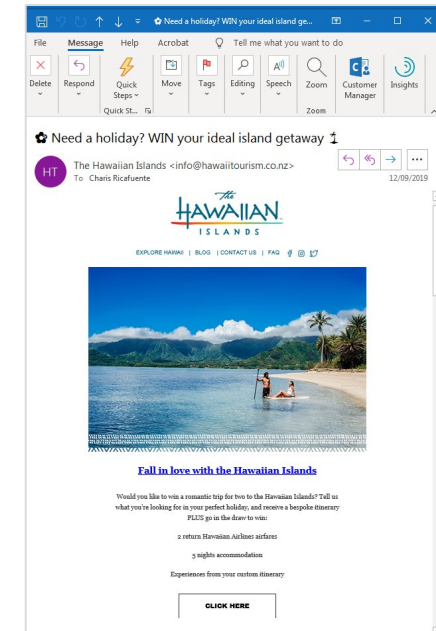
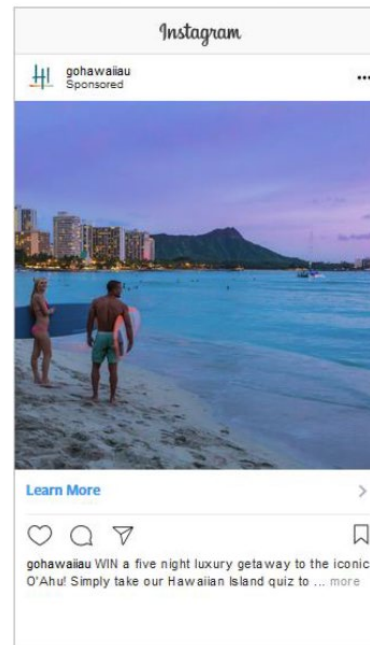


# CONSUMER STRATEGY

## Inspiration – Trip Discovery



## HTO channels



# CONSUMER STRATEGY

## Public Relations

EXPEDIA.COM.AU

DESTINATIONS EXPERIENCES LISTOPEDIA FOLLOW YOUR ROOTS TIPS & INSPIRATION

EXPLORE OCEANIA RELAX ROMANCE

### THE MAGIC OF MAUI – HOW ONE ISLAND CAPTURES YOUR HEART

LISA PERKOVIC — AUGUST 10, 2019

SHARE ON: Facebook, Twitter, LinkedIn, Print, Email

“Somewhere over the rainbow, blue birds fly...” drifts up to our balcony, but it’s not any version of the song I’ve heard before. Instead, the strings of a ukulele and a low voice take this song back to basics – add in the backdrop of crashing waves and the wind gently moving through the palm trees, and this moment is so uniquely Hawaiian. It will stay with me forever. The ukulele originated in Hawaii back in the 1800s, but it wasn’t until Jonico Castro sang this song, on this instrument, in front of the world (ok, ok, it was on American Idol), that the humble ukulele catapulted back to stardom. You don’t have to go far to learn how to serenade someone – most hotels offer free lessons as part of the resort fee. The Fairmont Kea Lani’s group lessons are always popular. Pluck a few strings next to the pool, or the beach, and you’ll win over hearts in no time.

This is just one of the moments that convinced me Maui has a special kind of magic. Here’s a few more reasons why you and your special someone should put this island paradise on your list:

## Trade: Call-to-action

Expedia.com.au

Home Hotels Packages Flights Cruises Cars Activities Holiday Rentals Last Minute Deals Blog Rewards

### The Hawaiian Islands

Hotel only Leaving from: HNL Going to: [City or airport]

Flight only Departing: [Date] Returning: [Date]

Hotel Rooms: 2 Adults (18+): 2 Children (0-17): 0 Things to Do: [Dropdown]

Search

Follow The Hawaiian Islands

**The HAWAIIAN ISLANDS** Escape to paradise  
Six Hawaiian Islands. Infinite Experiences



Expedia (AU) Sponsored

from hidden waterfalls and sun-kissed beaches to active adventures and energizing nightlife, the Hawaiian Islands offers infinite experiences or couples wanting to connect at any stage of their relationship.

hawaii – gohawaii.com

EXPEDIA.COM.AU  
**Escape to Paradise**  
Six Hawaiian Islands. Infinite ex...

LEARN MORE

# CONSUMER STRATEGY

Targeted approach:

- Increased investment in social media – paid social
- Measuring trends on our digital channels - Social Media and EDM
- Market specific research informs content curation

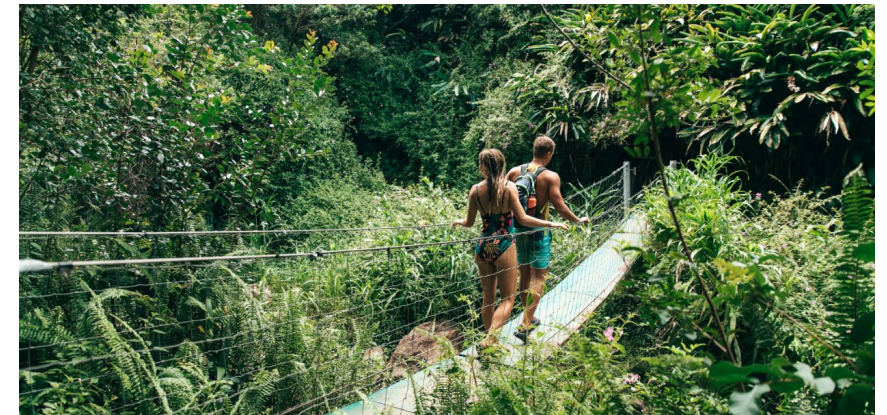




# CONSUMER STRATEGY

## Campaign Examples:

- Partner with non-tourism brands to leverage channels and activity e.g. Billabong
- Themes around adventure, nature and wellness that appeal to our high value traveller segment
- Multi-island campaign focusing on experiences
- Responsible tourism



# CONSUMER STRATEGY

## Lei Day activation

- Appeal to cultural explorers and authentic experiencers
- May Day activity highlighting Hawaiian Culture and the spirit of Aloha
- Key brand campaign providing consumers an immersive experience of Hawai'i in Oceania



# TRADE STRATEGY

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# TRADE STRATEGY

- Consumers research across multiple channels yet prefer to book Hawai'i via travel agent or OTA
- Trade play a role in inspiring, informing & educating the traveler
- Motivate 'preferers' to choose Hawai'i over another destination
- Travel agents are influential in promoting neighbor island visitation



# TRADE STRATEGY

Engagement tactics:

- Trade education:
  - Online and face-to-face
  - Support travel brands that service high value travelers – Travel agent conferences
- Trade Shows
  - Month of Lei
  - Aloha Down Under Roadshow
- Famils – Travel agents and product managers



# TRADE STRATEGY

Engagement tactics:

- Cooperative campaigns:
  - Influence branding via external channels
  - Support our key trade partners and top producers – OTAs and retail travel agencies
  - Multi-island content/packages
  - Focus on increasing length of stay and spend in market

**helloworld TRAVEL**  
THE TRAVEL PROFESSIONALS

## SIX HAWAIIAN ISLANDS, INFINITE EXPERIENCES

RETURN FLUENTS INCLUDED

There are six major islands to visit in Hawaii: Kauai, O'ahu, Molokai, Lanai, Maui and the Island of Hawaii. Each has its own distinct personality, adventures, activities and sights. Say Aloha and explore the islands to find your own heavenly Hawaii! experiences with these EXCLUSIVE Helloworld Travel deals.

5 NIGHTS AULANI, A DISNEY RESORT & SPA ON O'AHU	8 NIGHTS DISCOVER O'AHU & MAUI	10 NIGHTS O'AHU & THE ISLAND OF HAWAII
<p><b>INCLUDES</b></p> <ul style="list-style-type: none"> <li>• Return economy airfare to Honolulu flying Hawaiian Airlines including 2x 20kg checked luggage, meals, beverages and entertainment</li> <li>• 5 Nights stay at Aulani, A Disney Resort &amp; Spa***** in a Standard Room</li> <li>• Access to the Hana Mahoe Lani Water Recreation Zone nightly and exclusive of complimentary Disney Magic Nights, Magic Moments and 20kg checked luggage during Character Appearances</li> <li>• 5 Day Rental Car (see Group Compact <a href="#">www.hawaii.com</a>) on the Island of Oahu</li> <li>• EXCLUDING: TFGG guaranteed car upgrade to a Group Intermediate (quote based on need)</li> </ul> <p><b>SAVE 600* PER PERSON</b></p> <p>4 days \$2,689* per person 8 days \$3,175*</p> <p>10/15/19-11/25/19   12/16/19-12/26/19</p>	<p><b>INCLUDES</b></p> <ul style="list-style-type: none"> <li>• Return economy airfare to Honolulu flying Hawaiian Airlines including 2x 20kg checked luggage, meals, beverages and entertainment</li> <li>• Return economy airfare from Honolulu to Maui flying Hawaiian Airlines including 2x 20kg checked luggage</li> <li>• EXCLUDING: TFGG upgrade for the price of one (see Group Compact <a href="#">www.hawaii.com</a>) for Honolulu to Maui &amp; Maui to Honolulu</li> <li>• 8 Nights stay at the Halekulani Hotel, 40% off (not available at full rate) &amp; 10kg checked luggage in Honolulu</li> <li>• Airfare, Rental Car and Honolulu city tax</li> <li>• Return coach airfare from Honolulu to airport hotel</li> <li>• 2 Nights stay at Royal Lahaina in a 1 Queen Standard Room</li> <li>• 4 Day Rental Car (see Group Compact <a href="#">www.hawaii.com</a>) on the Island of Maui</li> <li>• EXCLUDING: TFGG guaranteed car upgrade to a Group Intermediate (quote based on need)</li> </ul> <p><b>SAVE 400* PER PERSON</b></p> <p>4 days \$2,965* per person 8 days \$3,175*</p> <p>10/15/19-11/25/19   12/16/19-12/26/19</p>	<p><b>INCLUDES</b></p> <ul style="list-style-type: none"> <li>• Return economy airfare to Honolulu flying Hawaiian Airlines including 2x 20kg checked luggage, meals, beverages and entertainment</li> <li>• Return economy airfare from Honolulu to Maui flying Hawaiian Airlines including 2x 20kg checked luggage</li> <li>• EXCLUDING: TFGG upgrade for the price of one (see Group Compact <a href="#">www.hawaii.com</a>) for Honolulu to Maui &amp; Maui to Honolulu</li> <li>• 10 Nights stay at the Halekulani Hotel, 40% off (not available at full rate) &amp; 10kg checked luggage in Honolulu</li> <li>• Airfare, Rental Car and Honolulu city tax</li> <li>• Return coach airfare from Honolulu to airport hotel</li> <li>• 2 Nights stay at Royal Lahaina in a 1 Queen Standard Room</li> <li>• 4 Day Rental Car (see Group Compact <a href="#">www.hawaii.com</a>) on the Island of Maui</li> <li>• EXCLUDING: TFGG guaranteed car upgrade to a Group Intermediate (quote based on need)</li> </ul> <p><b>SAVE 500* PER PERSON</b></p> <p>4 days \$3,175* per person 8 days \$3,175*</p> <p>10/15/19-11/25/19   12/16/19-12/26/19</p>

ASK US IN STORE TODAY ABOUT OTHER GREAT HAWAII DEALS

HAWAIIAN AIRLINES | HAWAIIAN TRAVEL | helloworld TRAVEL

**MCI**

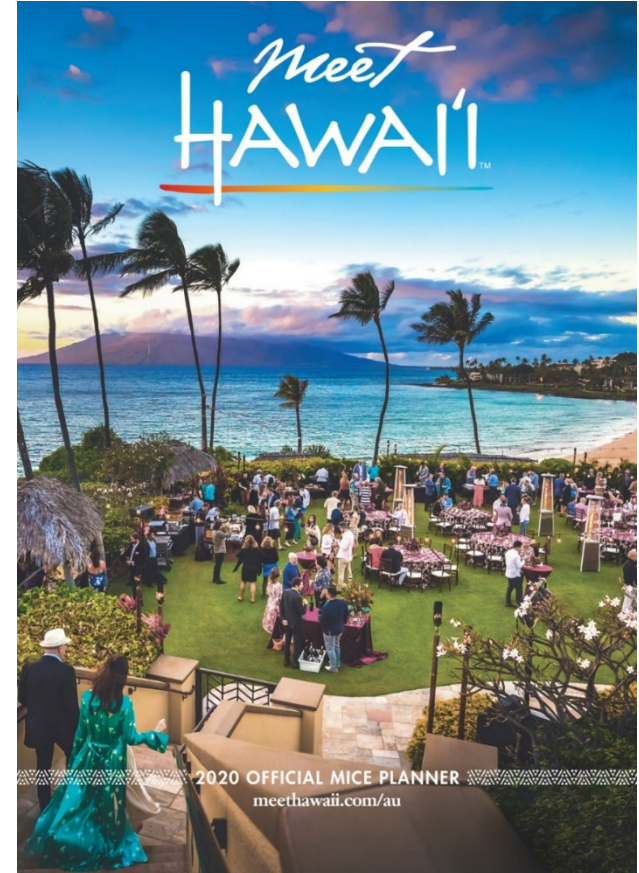
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**HAWAII TOURISM**<sup>™</sup>  
OCEANIA

# MCI

## Deployment:

- Dedicated MCI resources building on existing in market relationships
- Advertising and promotion via online channels, hosted events, FAMs and branded collateral
- Hawai'i partner collaboration and product expertise





# MCI



## Key Vertical Segments:

- 3rd party meeting planner
- Automotive
- Entertainment/Media
- Healthcare/medical
- Sports
- Franchise/Direct Selling

## Lead Development Strategy:

- Grow network of PCO relationships
- Meet Hawai'i Down Under Sales Mission
- Conference and tradeshow
- HTO events

# RESPONSIBLE TOURISM

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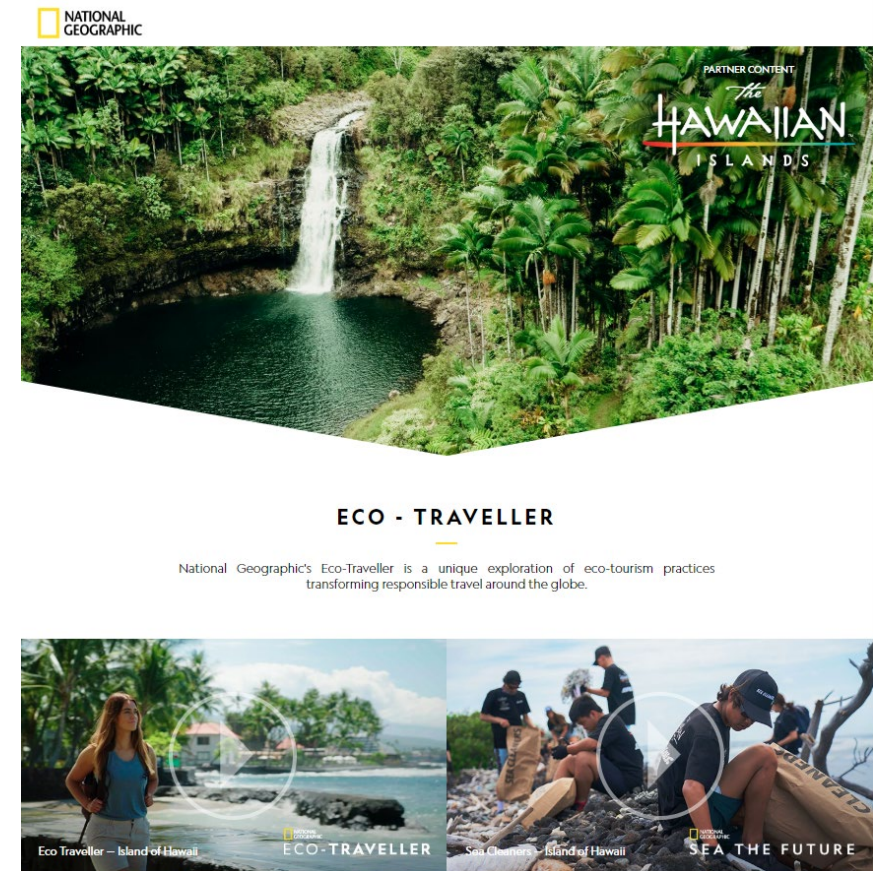
# RESPONSIBLE TOURISM

Distribution of Rooted, Kuleana, and Travel Tips video:

- Amplified across paid and organic social media
- Included in trade and consumer e-communications
- Destination updates and Aloha Down Under

Marketing content and PR

- Editorial and advertorial consumer content
- Content and imagery in HTO produced content



# RESPONSIBLE TOURISM

## Sea Cleaners Initiative:

- Partnership with non-profit environmental company, Sea Cleaners
- A true collaboration – HTA, HTO, HTJ, Industry partners, media
- Respecting & protecting culture & environment
- An exchange between Pacific Rim countries and Hawai'i around the issue we have with plastic rubbish in the Pacific Ocean
- Expand the Pacific Rim connection to Hawai'i





# NATIONAL GEOGRAPHIC TRAVELLED TO HAWAI'I



Brand Marketing



Hawaiian Culture



Natural Resources



Community