



2021 MARKET UPDATE

HTA BOARD MEETING 5.27.2021

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Senior Account Director

MARKET CONDITIONS



MARKET CONDITIONS

Australia & New Zealand Economies



Comparably strong domestic economies

Unite
against
COVID-19

Covid-19 Eliminated from the Community



Strong exchange rate:

- \$1 AUD = \$0.77 USD
- \$1 NZD = \$0.72USD

HAWAII TOURISM
OCEANIA

INSIGHTS

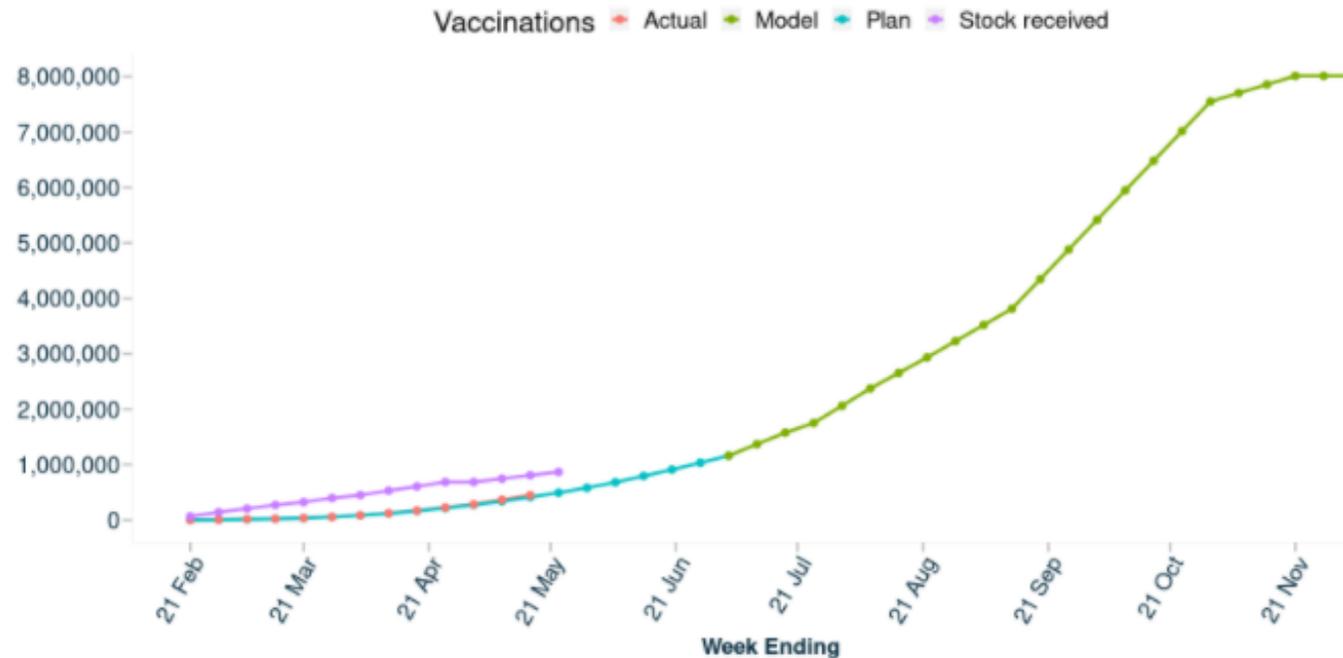
Insights

- ANZ-Roy Morgan Research reveals that Consumer Confidence is up. In fact, a huge 20.2pts higher than the same time a year ago,
- 28% of Australians say their families are 'better off' financially than this time last year. In addition, 37% of Australians expect their family to be 'better off' financially this time next year
- Over 6.69 million Australians (52.2% of paid workers) have at least 2 weeks of annual leave due, up from 6.14 million prior to the pandemic
- New Zealand's economic outlook much better than expected, with a jump in GDP growth (to +4.4%) and lower unemployment. (to under 5%)

VACCINE ROLLOUT IS KEY

Cumulative doses to end of year

NZ Roadmap to Q4



Daily doses increasing (AU)



BORDERS & BUBBLES

Recent Trend towards Under-Promising in order to Over-Deliver

- Australian Prime Minister Morrison says border changes to occur on ‘sliding scale’ amid pressure from Liberal MPs to reopen before mid-2022
- “The government is currently considering how to implement the “next steps” towards the reopening of Australia’s borders, including the easing of travel and quarantine restrictions for vaccinated Australians”
- NZ Prime Minister Jacinda Ardern speaks about the possibility of having vaccinated people arriving from overseas before the (vaccination) rollout in NZ is finished (Q4).
- “The reality is we’re already open to New Zealand. (Trans-Tasman Bubble). We’ll almost certainly be open to other places. We think the UK and US [with vaccines] will become effectively a safe low-risk destination.” *Flight Centre head, Graham Turner*

BORDERS & BUBBLES

- The successful Trans-Tasman bubble saw over 100,000 quarantine free travellers in the first 3 weeks
- Demand for the NZ – Cook Islands Bubble has seen Air NZ put on extra flights
- Hawai'i must remain top of mind and in the key conversations
- We remain hopeful that Hawai'i will see visitors from Oceania returning in Quarter Four of this year



TARGET AUDIENCE



REGENERATIVE TOURISM FOCUS

Visitors
who
CARE

Visitors
who are
AWARE

Visitors
who
SHARE

CARE, AWARE, SHARE

A blueprint based around three elements of the consumer travel journey.

1. Targeting potential travellers who **CARE**
2. Focussing on brand and product-aligned messaging that ensures we have a visitor who is **AWARE**
3. Provide the platforms for this visitor to influence friends, family and followers – i.e to **SHARE**

VISITORS WHO CARE



CULTURAL EXPLORERS*

- Learning and discovery
- Local immersion
- Families and couples
- Planning: destination website, Airline/hotel sites
- 35- 54 years of age



AUTHENTIC EXPERIENCERS*

- Tangible engagement
- History and culture
- Voluntourism
- Planning: OTAs, Airline/hotel sites
- Mature traveller 55+ year of age

CONSUMER STRATEGY



REGENERATIVE TOURISM FOCUS

Visitors
who
CARE

Visitors
who are
AWARE

Visitors
who
SHARE

Consumer Activity – Awareness

- Digital Marketing
- Advertising
- PR stories
- Direct Communication
- Partnerships aligned to community, culture and mālama
- Pre & post arrival messaging
- Smart Social

REGENERATIVE TOURISM FOCUS

Visitors
who
CARE

Visitors
who are
AWARE

Visitors
who
SHARE

Consumer Activity – Sharing of experiences

- Media & Influencers with the right audience
- Promotions which encourage sharing of personal experiences
- Strong social network presence
- Partnerships with social media special interest groups
- Trade and Industry partnerships which encourage sharing
- Pre & post arrival messaging
- Hashtag focus

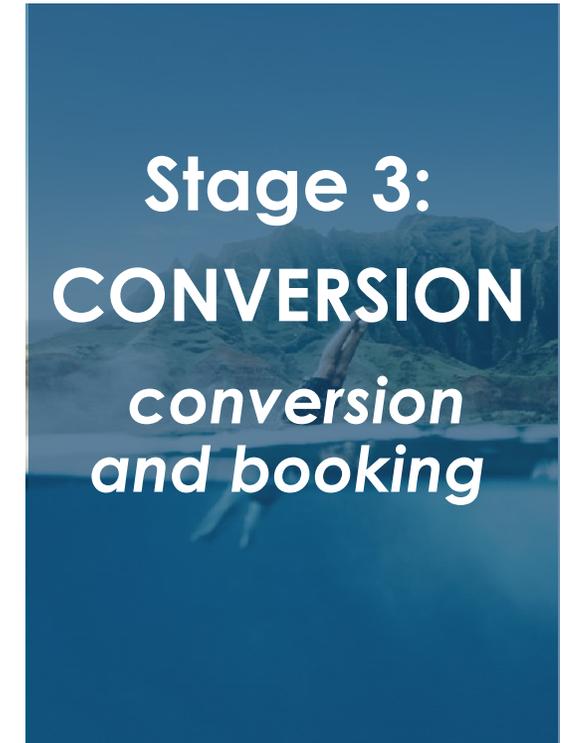
THE RIGHT MESSAGE



MĀLAMA HAWAI'I

CONSUMER STRATEGY

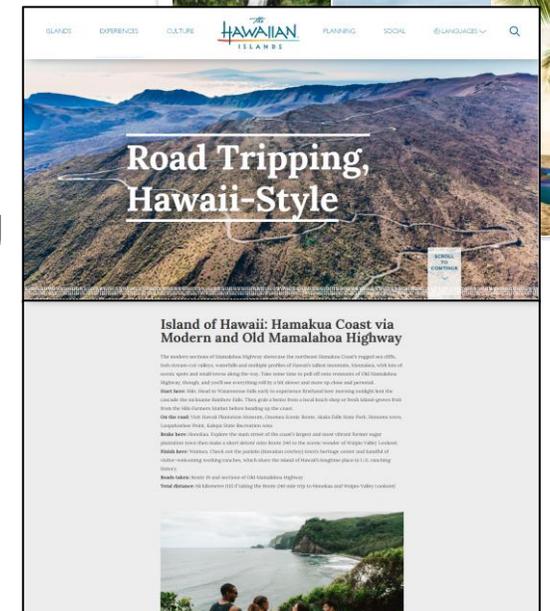
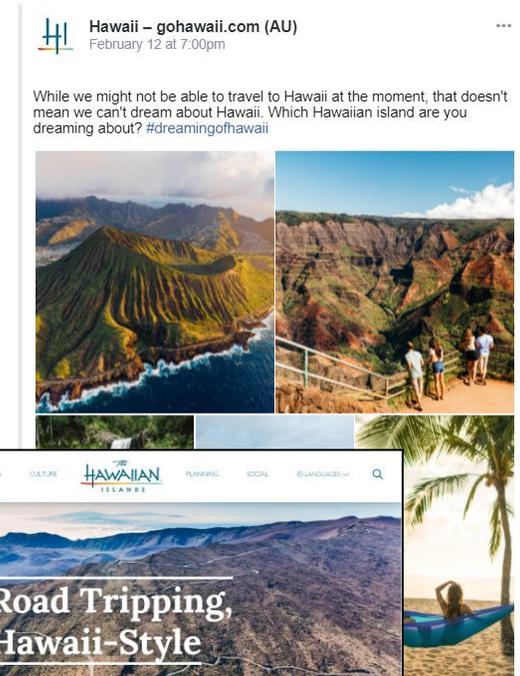
3 Stage Recovery Plan



CONSUMER STRATEGY – STAGE 1

Stage 1: Inspiration

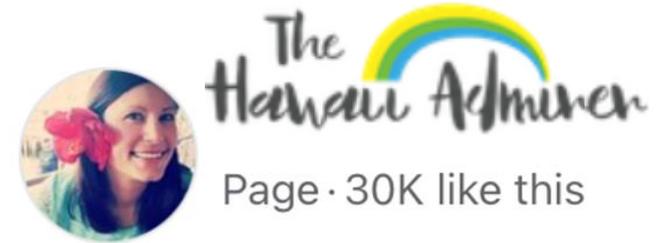
- The dreaming phase
- Reinforcing brand perceptions of Hawai'i –aligning with HTA's brand pillar and emphasising the message of mālama
- Inspirational imagery – natural beauty, wide open spaces and culture
- Utilising owned channels – organic social media and blog
- #DreamingOfHawaii introduced to share a message of welcome to visitors from Australia and New Zealand



CONSUMER STRATEGY – STAGE 2

Stage 2: Brand Depth

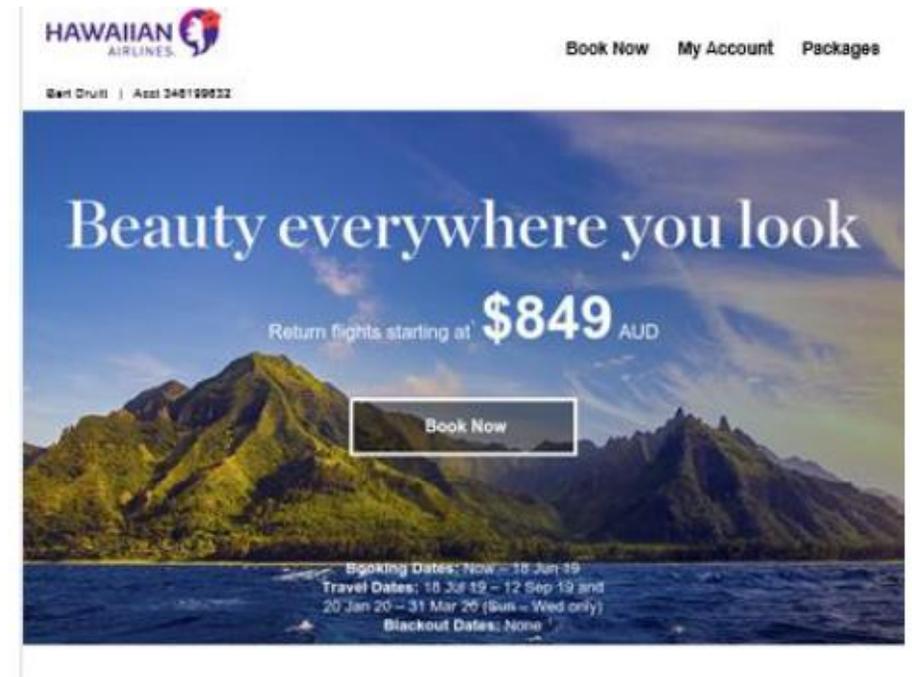
- Active Planning stage
- Timing around planned re-opening of air access and growing consumer confidence to travel
- Setting the foundation for inspiring and motivating the desired future visitor to choose Hawai'i
- Activity aligned to brand pillars and creating travel intention through rich content and imagery with a focus on digital marketing and PR activity
- Social media – unique partnership with @hawaiiadmirer
- Amplify Kuleana and Mālama Hawai'i videos



CONSUMER STRATEGY – STAGE 3

Stage 3: Conversion

- Conversion – booking and travel
- Air access resumes - HTO will work with airline partners to support this transition.
- Call to action sensitive to the environment aligned with trade integration.
- Restart paid media
- #LetHawaiiHappen is introduced in social media
- Launch of signature campaigns



RESPONSIBLE TOURISM – MĀLAMA

- Promoting the Mālama Hawai'i initiative:
 - Work with trade to partners on opportunities to promote this and include in Hawai'i packages.
 - Journalist press trips which showcase the voluntourism experience and hotels in the Mālama initiative
 - Promote across digital channels – organic and paid



INFINITE EXPERIENCES CAMPAIGN

Influencer famil



Audience polls



Live streaming



CULTURAL TOURISM INITIATIVE

- Broadcast partnership
- Tap into themes of culture, sustainability and nature experiences
- Resonate with the Oceania market
- Q1 initiative in 2022



TRADE STRATEGY



REGENERATIVE TOURISM FOCUS

Visitors
who
CARE

Visitors
who are
AWARE

Visitors
who
SHARE

Trade Activity – Awareness & Product Alignment

- Travel trade education
- Partnering with the right segments
- Ensure product is aligned
- Connecting local trade with the industry
- Reaching their engaged clients

TRADE STRATEGY – KEY INITIATIVES

Trade initiatives:

- Implementation of Mālama program
- Leverage our Tradewinds platform
- Virtual destination showcase
- Month of Lei
- Product managers famil
- Aloha Fridays content second half of the year



MCI & EVENTS – SOME GOOD NEWS

Golden Oldies Rugby – May 2021:

- 1,000 visitors
- Minimum stay 7 days, with many opting for pre or post add-ons (including NI)
- Mix of teams from AU, NZ, USA & local
- More events in the pipeline including Netball at the HCC
- A result of a strong partnership and aloha



REGENERATIVE TOURISM / DMAP INITIATIVES



www.gohawaii.com/malama

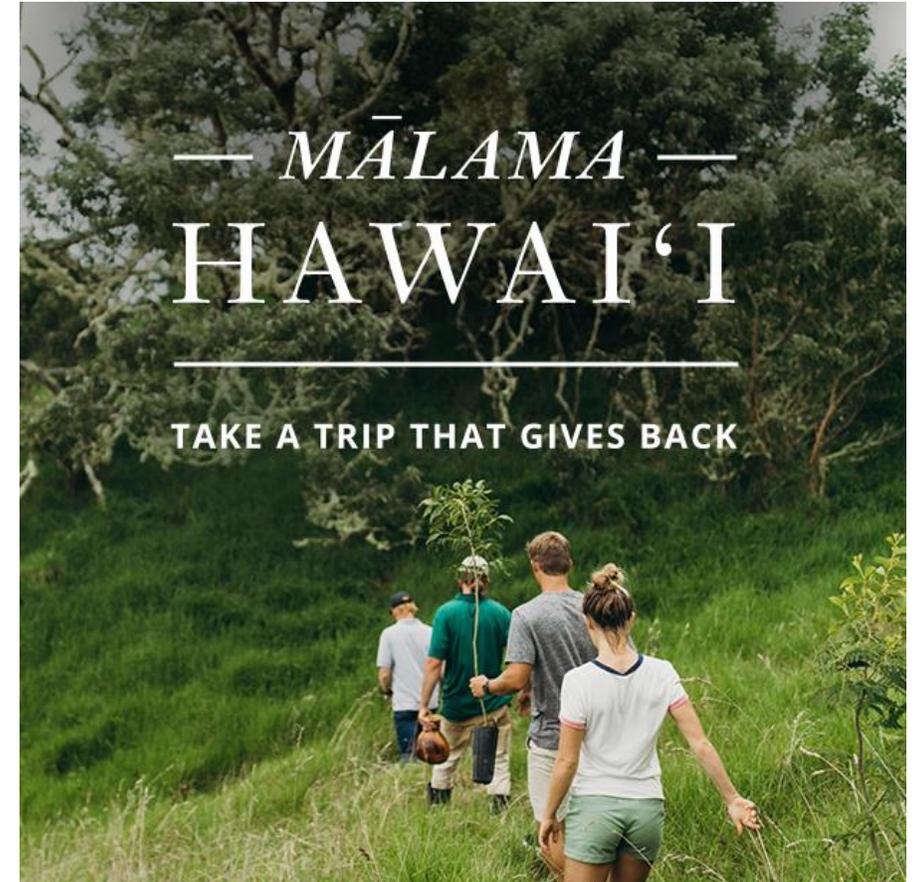
Giving Back on Vacation



HAWAII TOURISM
OCEANIA

WHERE HTO CAN PLAY A PART

- Promoting the Mālama Hawai'i programme and message
- Understanding the details and principles around the DMAP initiative
- Matching our visitor with the right experience and location
- Clear and respectful messaging around kuleana
- A targeted approach on visitors who **Care**, are **Aware** and who will **Share**



HAWAI'I MADE

- Working with US Embassy & Trade in local markets
- Partnering Hawai'i Made partners for all in-market events
- Featuring Hawai'i Made in PR initiatives and press trips
- Creating stories and consumer messaging around Hawai'i Made



GUIDED BY HTA PILLARS



Marketing



Hawaiian Culture



Natural Resources



Community



MAHALO NUI LOA

HAWAII TOURISM
OCEANIA