

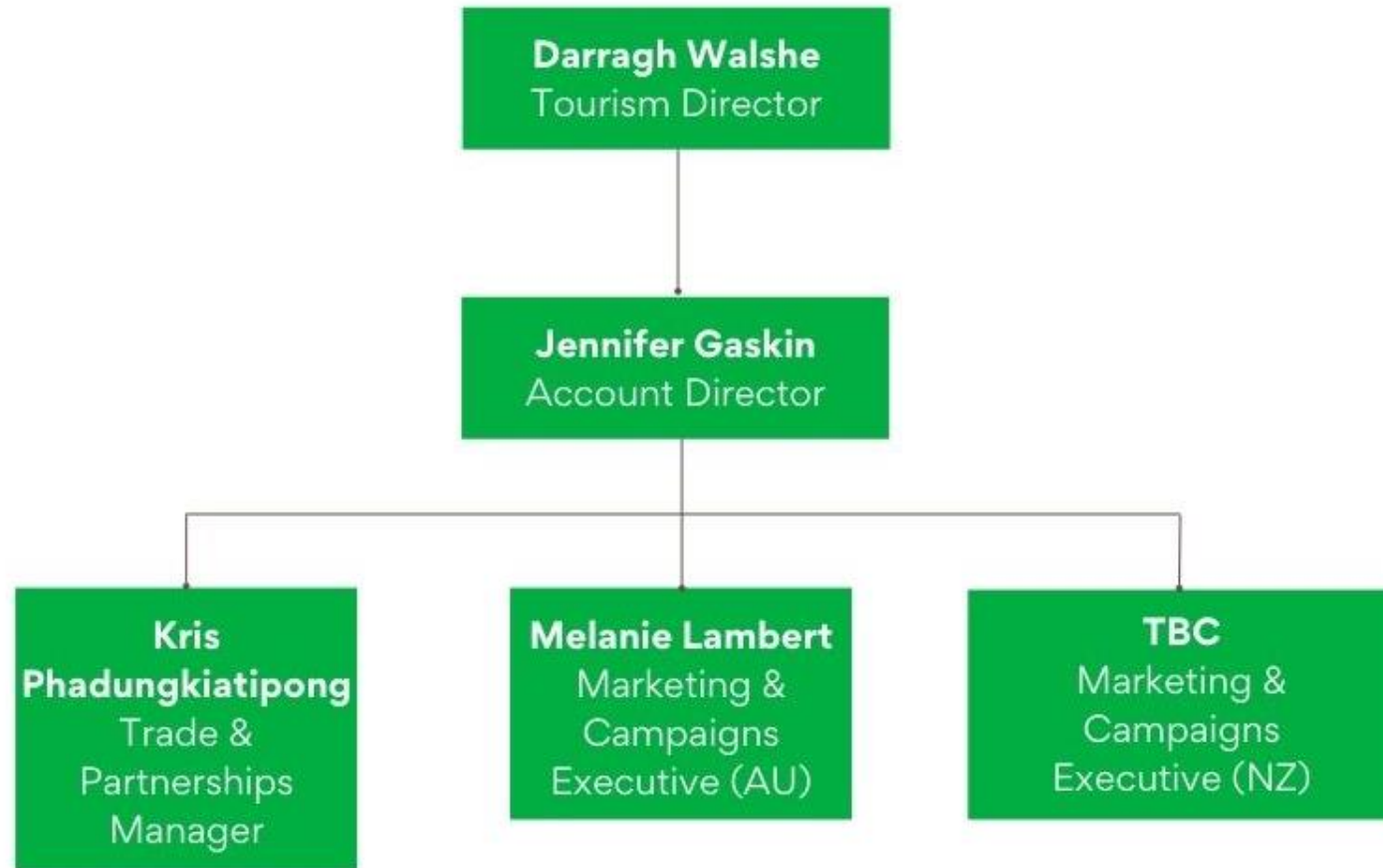


2022 BMMP

HTA Winter tourism Update
2.9.2022

Jennifer Gaskin
Hawai'i Tourism Oceania

HAWAII TOURISM OCEANIA TEAM



MARKET SITUATION

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General Economy

The pandemic recession in 2020 was milder in Australia than in most other OECD countries. Extended lockdowns and consumer and employer uncertainty have hit jobs and spending in 2021, but the IMF has upgraded its growth forecast for next year from 3 per cent to 4.1 per cent.

New Zealand

New Zealand has been held up as one of the leading countries in their handling of the Covid pandemic. International travel and tourism has been the main industry to suffer from this approach. The rest of the economy has been able to operate well and economic growth forecast is predicted to reach 3.8% in 2022.

Travel Restrictions

Australia

- Australian citizens and permanent residents are free to leave and re-enter Australia quarantine free
- Travelers no longer need a PCR test to re-enter Australia, rapid antigen tests are now accepted
- Travelers also need to take a rapid antigen test on day 6 upon return
- Australia's inbound tourism industry is due to restart in April
- All states are now open, except for Western Australia

New Zealand

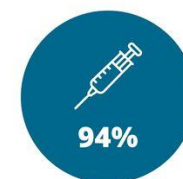
- New Zealand's managed quarantine is due to end on 13 March for all vaccinated New Zealanders
- Hotel quarantine will be replaced with 10 days home isolation
- Vaccinated citizens in Australia can enter NZ from 27 February without needing to undergo state mandatory hotel quarantine.
- Vaccinated citizens elsewhere will be allowed to re-enter from 13 March
- New Zealand's border has never been closed, but hotel quarantine was a major barrier to travel

Covid Vaccinations

Two Doses



Australia



New Zealand

Boosters



Australia



New Zealand

MARKET SITUATION

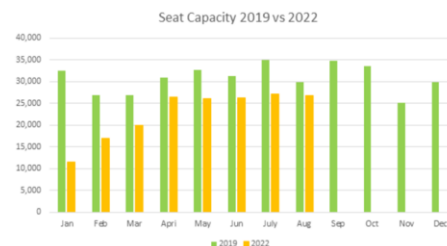
General Travel Sentiment

- The initial positivity around Australia's border opening took a dip in January with the Omicron outbreak
- However, confidence is returning with many partners seeing an increase in enquiries and bookings, with Hawai'i consistently in the top 3 destinations



Air Seat Synopsis

- Hawai'ian Airlines is currently flying 4 days a week from Sydney, with their schedule likely to increase later in the year
- Jetstar are due to resume their schedule from Sydney and Melbourne to Hawai'i from 1 March
- Qantas began flying in December but paused their flights in Jan. They are due to resume flying from Sydney from 27 March
- Flights from New Zealand are due to resume with Hawai'ian Airlines from May.
- Air NZ will return daily by July



Competitive landscape

- Fiji reopened in Q4 last year and has been marketing aggressively throughout the pandemic
- Thailand and Japan have also retained a strong presence in market throughout the past two years
- Most other USA destinations are returning to full marketing plans and spend
- As more destination open up, competition is becoming increasingly fierce to win over Oceania travelers

Say bula to Fiji! Virgin Australia brings forward international flight schedule



TARGET AUDIENCE

TARGET AUDIENCE

The Future Consumer

When considering travel, there will be renewed focus on aligning personal values to the travel experiences chosen and a new type of traveler will emerge. They value:

- Authenticity
- Enrichment
- Seek connection to a place through the local community, culture, and natural environment

Key Segments



Fun and Fit Families

- Parents with school-aged children.
- Parents will likely be high income working professionals
- Active outdoor lifestyle
- Looking for a safe and cost-effective holiday destination that provides relaxation, active soft adventure and cultural activities for everyone



Curious Couples

- Older couples (50+) who are empty nesters or retirees.
- Travel in shoulder or low seasons
- While they want to experience new things and interact with local people, safety and ease of travel are the most important factors for this demographic.
- They may be repeat visitors or they could also be ticking places off their 'bucket list'.



Mindful millennials (SINKS & DINKS)

- Couples or groups of friends
- Looking for an exciting and adventurous overseas destination
- Take part in fun new activities, experience a different culture and do their bit for the planet.
- Aged in their 30's these travelers are likely to be career driven and earning around \$80 - \$100 AUD per year.
- Likely to travel in shoulder seasons

2022 STRATEGY

STRATEGY

Core Branding Message



Breathtaking Landscapes



Natural Beauty



Authentic Culture



Regenerative Tourism



Connected by the Aloha Spirit

Consumer Strategy

- Digital content
- Brand partnerships
- Social media
- Education through engaging content

Trade Strategy

- Engagement
- Education
- The right partners
- Families & events

PR Strategy

- Stories that focus on community, culture and the environment
- Broadcast opportunities
- Leverage relationships

KEY CAMPAIGNS/PROGRAMS

KEY CAMPAIGNS/PROGRAMS

Infinite Experiences

To showcase the diversity of experiences across the Hawaiʻian Islands we are sending a group of influencers on a multi-island bespoke famil packed with spontaneous adventures. Beautiful content will be streamed across influencers' and Hawaiʻi Tourism Oceania's highly engaged social channels. During their time on the islands, we will be passing the reins over to our social media community to choose how their adventure unfolds.

Target audience

Fun and fit Families & Mindful Millennials

Outcomes

Estimated digital reach: 4,000,000

Collective influencer reach: 500,000

Pieces of content: 200+

Influencer famil



Audience polls



Live streaming



KEY CAMPAIGNS/PROGRAMS

Video Content Partnership

Hawai'i stands out against other destinations because the heritage, culture and spirit of aloha epitomize what it means to live harmoniously with the land and ocean. To communicate this philosophy, the team will create a premium long form video that highlights Hawai'ian ethos in a storytelling format that appeals to our key audience segments.

A documentary film will tap into themes of culture, sustainability, responsible tourism and connection to the land and ocean. It will be distributed and amplified via platforms and brands with aligned brand values and practices. The initiative has the potential to feature on-demand video streaming platforms or broadcast channels where the film would feel native to the channel. For example, such content platforms can be found on National Geographic or SBS channel.

We will also look into the possibility of the film being featured as part of the Ocean and/or Adventure film festivals in Oceania.

We will partner with a mainstream brand with established sustainability credentials to leverage external digital and PR channels to a new audience. Potential partners include National Geographic who we partnered successfully on the Eco-traveler series and Sea Cleaners initiative.



KEY CAMPAIGNS/PROGRAMS

‘Sea Cleaners’ Initiative

Following the successful 2019 Sea Cleaners initiative that expanded the youth ambassador partnership to include three Pacific Rim countries (NZ, Australia and Japan) 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.

Target audience

Mindful Millennials

Objectives

- Show how tourism can make a positive change to the environment and local community
- Help make generational change to our environment by educating and inspiring youth ambassadors from around the Pacific Rim
- Showcase Hawai‘i regenerative tourism programs and partners

Timeline

Sep 17th 2022 (International Coastal Clean-up Day)

Outcomes

Estimated digital reach: 4,000,000



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.

Target Audience

Travel agents and trade partners

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

Timeline

August 2022



KEY CAMPAIGNS/PROGRAMS

Luxury Escapes Partnership

Luxury Escapes is the fastest growing travel company in Oceania. Their booking model has allowed them to remain strong throughout the pandemic. They have delivered very positive results for partners in the past and have a consumer base aligned with our target audience. We will partner with Luxury Escapes on their TV show and a destination spotlight campaign in 2022.

Target Audience

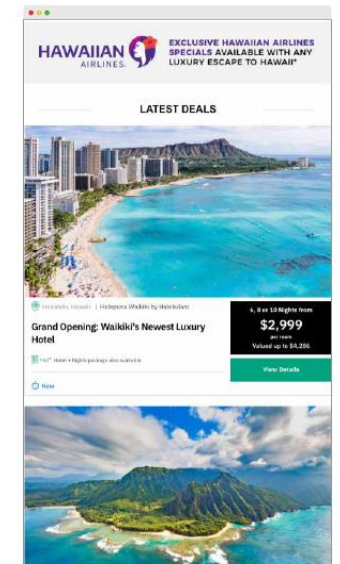
Curious Couples, Fun & Fit Families

Objectives

- Increase awareness of key messages through TV and digital content
- Promote key partners and activities
- Drive increased room nights within target demographic

Timeline

Q3 2022



PERFORMANCE MEASURES

	Annual Target
Consumer Paid Media - Digital Impressions	4,000,000
Travel Trade Paid Media - Digital Reach	400,000
No. of Media/PR Calls	60
No. of Press Releases Issued	12
Digital Publicity Value - Paid	\$1,000,000
Digital Impressions - Paid	12,000,000
Print Publicity Value - Earned	\$6,000,000
Digital Publicity Value - Earned	\$10,000,000
Broadcast Publicity Value - Earned	\$5,000,000
Print Impressions - Earned	20,000,000
Digital Impressions - Earned	50,000,000
Broadcast Impressions - Earned	3,000,000
No. of Group Media FAMs	3
No of Articles Generated from Group Media FAMs	15
No. of Individual Press Trips	12
No of Articles Generated from Individual Press Trips	20
Consumer Shows - No. of Shows	3
Show Attendance	9,000

TRAVEL TRADE	<u>Trade Show Attendance</u>	600
	No. of Trade Show Appointments	60
	No. of Travel Trade FAMs	4
	No. of Travel Trade FAM Participants	32
	No. of Trade Education Sessions	12
	No. of Trade Education Participants	120
	No. of Agents Completed Training Program	200
SOCIAL MEDIA –FACEBOOK	Total Impressions Gained	3,000,000
	Total Interactions Gained	300,000
	Total Fan Count	130,000
	Increase in Fans	7,000
	Total Posts	240
SOCIAL MEDIA –INSTAGRAM	Total Impressions Gained	1,000,000
	Total Interactions Gained	100,000
	Total Fan Count	33,000
	Increase in Fans	4,000
	Total Posts	240
DMAP MEASURES		
	No. of DMAP Action Items Supported	12
	No. of Initiatives to Promote Hawai'i Made Products	12
	No. of Hawai'i Festivals & Events Promoted	24
	No. of Voluntourism Programs Promoted	12

PARTNERSHIP OPPORTUNITIES



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TRADESHOWS/EVENTS				
Virtuoso Forum	May	Virtuoso Forum Australia & New Zealand offers agency owners and managers the opportunity to gather in a collaborative setting that promotes learning, sharing, and empowerment. Forum will draw on the knowledge of outside experts and Virtuoso leaders, provide professional development appropriate for running businesses, afford opportunities for peer-to-peer learning, and include networking time between local agency executives and preferred partners	Adelaide	Virtuoso members' latest update/information can be provided to HTO to incorporate in our presentations. HTO contact: kphadung@hawaiiitourism.com.au
International Media Market Place	17-18 February 2022	International Media Market Place 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.	Sydney	HTO contact: jgaskin@hawaiiitourism.com.au
Visit USA / Brand USA	2 March 2022	HTO will be representing Hawaii in the Visit USA Hybrid trade show (Brand USA in NZ).	Sydney	In-kind support for prize sponsorship – For more information please contact: HTO contact: kphadung@hawaiiitourism.com.au
Month of Lei	TBC May 2022	HTO's annual meeting with key partners to provide update & upcoming opportunities. In 2022, HTO will host this update meeting in Sydney, Melbourne and Auckland in conjunction with Month of Lei celebrations and destination training.	Sydney, Melbourne & Auckland	Partners' latest update/information can be provided to HTO to incorporate in our presentations. HTO contact: kphadung@hawaiiitourism.com.au
Aloha Down Under	22-26 August 2022	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 & more details to follow. For more information, please visit www.alohadownunder.com.au	Auckland, Melbourne, Brisbane & Sydney	Participation Fee - approx. AU\$4,500 + travel costs For more information contact (Australia): Kris kphadung@hawaiiitourism.com.au and EOI will be sent out soon.
World Indigenous Peoples Conference on Education (WIPCE)	26-30 September 2022	The World Indigenous Peoples Conference on Education (WIPCE) draws Indigenous representatives from across the globe to share successes and strategies for culturally grounded education. The needs of young Indigenous educators and leaders will be a key feature of WIPCE 2022 youth forums. WIPCE attracts Indigenous education experts, practitioners, scholars, students and communities, with up to 5,000 delegates expected in 2022 – the largest and most diverse Indigenous education forum on earth.	Adelaide	Currently determining partnership opportunities. HTO will be present at the conference working with HTA. HTO contact: kphadung@hawaiiitourism.com.au

FAMILIARIZATION TRIPS (FAMS)				
Product Manager Fams	March 2022	HTO Australia & NZ will work with our key wholesalers/trade partners on Product Manager fams throughout the year (min 4) <u>heroing</u> each island. This will be in alignment with our co-operative campaigns or trade initiatives. Partners <u>have the opportunity</u> to support this with in-kind and showcase their product dates to be advised.	Multi-Islands	For in-kind support, please contact Jen to express your interest. HTO contact: jgaskin@hawaiiitourism.com.au
Trade Fams	Q2 2022	HTO will work with Australian/NZ travel trade to support a range of travel agent fams throughout the year that partners will have the opportunity to be involved. More details to follow.	Multi-Islands	In-kind support for accommodation and ground activities. HTO contact: kphadung@hawaiiitourism.com.au
Media fams	Q2 2022	HTO will work with Australian/NZ travel media to support a range of travel journalists throughout the year that partners will have the opportunity be involved. Calendar to come.	Multi-Islands	HTO contact: jgaskin@hawaiiitourism.com.au
Regenerative Tourism Fams	TBC	In conjunction with HTA's Malama Hawaii, HTO will invite key partners to participate in seminars, workshops, and Malama experiences with Hawaii partners across the Hawaiian Islands.	Multi-Islands	In-kind support. For more information contact Darragh Walshe dwwalshe@hawaiiitourism.co.nz jgaskin@hawaiiitourism.com.au
Industry discounts for travel agents	Year round	HTO receives numerous inquiries regarding industry discounts for travel agents' personal holidays to <u>Hawaii</u> . This is a great self-fam 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 2022, or if you have a dedicated person that can handle industry requests, please let us know the details by 10 January 2022 by filling in the below online form: Year-round Industry Discount HTO will compile these and promote these year-round industry discounts via our database and during our agent training. HTO contact: kphadung@hawaiiitourism.com.au

PARTNERSHIP OPPORTUNITIES

TRAVEL TRADE EDUCATION				
Month of Lei IC Destination Training	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, Adelaide, Auckland, + Tauranga	IC specific, although industry may want to contribute prizes HTO contact: dwalsh@hawaiiitourism.co.nz kohadung@hawaiiitourism.com.au
Travel & Consumer professionals e-newsletter	Quarterly	Communicate to HTO's Australian and New Zealand travel trade database (3,280+). Monthly – Deadline by 12 of each month.	n/a	Free opportunity. If you would like to be featured please send a paragraph of copy (max 50 words), image and web link to Mel by the deadline outlined, HTO contact: dwalsh@hawaiiitourism.co.nz mlambert@hawaiiitourism.com.au
Travel Agent Training Program/Webinars	Yearly calendar	HTO undertakes regular training sessions with travel agents across Australia and New Zealand. <u>Upcoming Trade Training</u> - Virtuoso Webinar March 2022 - Travel Managers Webinar Feb 2022 - MTA March 2022 - Flight Centre TBC - Ignite TBC - Itravel TBC	Australia & New Zealand	Please send through industry updates – eg new/changed product, general island updates. HTO contact: kohadung@hawaiiitourism.com.au
Aloha Fridays Trade feature: Travel Weekly, KaryOn & Travel Today	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.		Free Opportunity. If you would like to be featured, please send info and images to jgaskin@hawaiiitourism.com.au or dwalsh@hawaiiitourism.co.nz Link to Aloha Friday Pages: http://www.travelweekly.com.au/tag/aloha-down-under/ http://www.travelfiles.co.nz/rsgion/hawaii/
Hawaii Tourism LinkedIn	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.		Free Opportunity. If you would like to be featured, please send info to jgaskin@hawaiiitourism.com.au

PUBLIC RELATIONS				
Visiting media program	Year round	Throughout the year, HTO hosts a number of 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 dwalsh@hawaiiitourism.co.nz
Media releases	Year round	HTO sends out multiple press releases and media updates and undertakes media calls throughout the year. Partners have the opportunity to provide their own press releases and product updates for inclusion	n/a	No cost. Please send your press releases and updates to media@hawaiiitourism.com.au dwalsh@hawaiiitourism.co.nz
HTO Blog and social networks	Year round	HTO reach out to past, present and potential Australian and New Zealand visitors to Hawaii through our Facebook, Twitter and Instagram handles. Australia www.facebook.com/gohawaii www.twitter.com/gohawaii www.instagram.com/gohawaii New Zealand www.facebook.com/gohawaiiNZ www.instagram.com/gohawaiiNZ	n/a	Notify HTO of your own official accounts, follow us and engage online by using our social media handles. Please email Jen (HTO AU) or Darraagh (HTO NZ) with any special announcements you'd like us to consider sharing. HTO contact: dwalsh@hawaiiitourism.co.nz jgaskin@hawaiiitourism.com.au
CONSUMER PROMOTIONS				
Explore Media "Discover" Hawaii guides	Year round	HTO produces a range of printed guides under the following titles: <ul style="list-style-type: none">FamilyRomanceMeet HawaiiDiscover Hawaii. Partners have an opportunity to advertise in these guides. Guides are distributed to travel trade and to consumers via mail and at consumer travel shows. 8000 10000 per issue per year distributed. Guides will also be available online via www.go-hawaii.com	n/a	More information on booking deadlines, inclusions and rates are available via publisher angela@exploremedia.com.au
Consumer EDMs	Bi-monthly	Communicate to HTO's Australian and New Zealand travel trade database (100,000+).	n/a	Free Opportunity. If you would like to be featured please send a paragraph of copy (max 150 words), image and web link by the deadline outlined, Please send info to info@hawaiiitourism.com.au mlambert@hawaiiitourism.com.au
Cooperative campaigns and partnerships	Year round	HTO will continue to implement co-operative marketing campaigns with wholesale/retail partners industry partners targeting peak sales periods and linked to consumer campaigns	n/a	Special offers or price points to be included in the campaigns. For more information contact Jen: jgaskin@hawaiiitourism.com.au
Consumer promotions	Year round	HTO work with select Oceania brands on consumer promotions to encourage travel to Hawaii and build a stronger positioning and brand awareness. These promotions provide fantastic exposure and database opportunities in exchange for accommodation and activity sponsorship.	n/a	HTO require sponsorship of tours, accommodation and activities. For more information contact Jen: jgaskin@hawaiiitourism.com.au
International Traveller 12-page Magazine	TBC	HTO will work with International Traveller on a 12 page magazine in 2022. More details to follow.		For more information contact Jen: jgaskin@hawaiiitourism.com.au

MAHALO!

