2022 BMMP

HTA Winter tourism Update
2.9.2022

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HAWA'I TOURISM OCEANIA TEAM

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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

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>93.5%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>94%</td>
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Boosters

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>35%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>38%</td>
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</table>
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
- Famils & 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 Hawai‘ian 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 Hawai‘i 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+
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.
‘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
<table>
<thead>
<tr>
<th>Annual Target</th>
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<tbody>
<tr>
<td>Consumer Paid Media - Digital Impressions</td>
<td>4,000,000</td>
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<tr>
<td>Travel Trade Paid Media - Digital Reach</td>
<td>400,000</td>
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<tr>
<td>No. of Media/PR Calls</td>
<td>60</td>
</tr>
<tr>
<td>No. of Press Releases Issued</td>
<td>12</td>
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<tr>
<td>Digital Publicity Value - Paid</td>
<td>$1,000,000</td>
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<tr>
<td>Digital Impressions - Paid</td>
<td>12,000,000</td>
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<tr>
<td>Print Publicity Value - Earned</td>
<td>$6,000,000</td>
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<tr>
<td>Digital Publicity Value - Earned</td>
<td>$10,000,000</td>
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<tr>
<td>Broadcast Publicity Value - Earned</td>
<td>$5,000,000</td>
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<tr>
<td>Print Impressions - Earned</td>
<td>20,000,000</td>
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<tr>
<td>Digital Impressions - Earned</td>
<td>50,000,000</td>
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<td>Broadcast Impressions - Earned</td>
<td>3,000,000</td>
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<tr>
<td>No. of Group Media FAMs</td>
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<tr>
<td>No of Articles Generated from Group Media FAMs</td>
<td>15</td>
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<tr>
<td>No. of Individual Press Trips</td>
<td>12</td>
</tr>
<tr>
<td>No of Articles Generated from Individual Press Trips</td>
<td>20</td>
</tr>
<tr>
<td>Consumer Shows - No. of Shows</td>
<td>3</td>
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<tr>
<td>Show Attendance</td>
<td>9,000</td>
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<tr>
<td>Category</td>
<td>Measurement</td>
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<td>-------------------------------</td>
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<tr>
<td><strong>TRAVEL TRADE</strong></td>
<td>Trade Show Attendance</td>
</tr>
<tr>
<td></td>
<td>No. of Trade Show Appointments</td>
</tr>
<tr>
<td></td>
<td>No. of Travel Trade FAMs</td>
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<tr>
<td></td>
<td>No. of Travel Trade FAM Participants</td>
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<td></td>
<td>No. of Trade Education Sessions</td>
</tr>
<tr>
<td></td>
<td>No. of Trade Education Participants</td>
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<tr>
<td></td>
<td>No. of Agents Completed Training Program</td>
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<tr>
<td><strong>SOCIAL MEDIA – FACEBOOK</strong></td>
<td>Total Impressions Gained</td>
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<tr>
<td></td>
<td>Total Interactions Gained</td>
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<td></td>
<td>Total Fan Count</td>
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<td></td>
<td>Increase in Fans</td>
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<tr>
<td></td>
<td>Total Posts</td>
</tr>
<tr>
<td><strong>SOCIAL MEDIA – INSTAGRAM</strong></td>
<td>Total Impressions Gained</td>
</tr>
<tr>
<td></td>
<td>Total Interactions Gained</td>
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</tr>
<tr>
<td></td>
<td>Total Posts</td>
</tr>
<tr>
<td><strong>DMAP MEASURES</strong></td>
<td>No. of DMAP Action Items Supported</td>
</tr>
<tr>
<td></td>
<td>No. of Initiatives to Promote Hawai’i Made Products</td>
</tr>
<tr>
<td></td>
<td>No. of Hawai’i Festivals &amp; Events Promoted</td>
</tr>
<tr>
<td></td>
<td>No. of Voluntourism Programs Promoted</td>
</tr>
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</table>
PARTNERSHIP OPPORTUNITIES
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<table>
<thead>
<tr>
<th>TRADEFAIRS/CONFERENCES</th>
<th>DESCRIPTION</th>
<th>EVENT DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vita Life Emerge</td>
<td>Australian &amp; New Zealand offers agency owners and managers the opportunity to gather in a collaborative setting exploring launching, sharing and empowering.</td>
<td>2 March 2022, Sydney, Australia</td>
</tr>
<tr>
<td>International Media Market Place</td>
<td>A new platform for the media to meet travel and tourism companies.</td>
<td>17-18 February 2022, Sydney, Australia</td>
</tr>
<tr>
<td>VistA USA/Brand USA</td>
<td>To be presented mainland in VistA USA world trade show (Olivia USA on HTO).</td>
<td>2 March 2022, San Diego, USA</td>
</tr>
<tr>
<td>Australian Travel Week</td>
<td>HTO is the key sponsor of the Australian Travel Week trade show in Sydney, Australia.</td>
<td>10-14 May 2022, Sydney, Australia</td>
</tr>
<tr>
<td>Melbourne International Travel Expo</td>
<td>To provide updates on travel opportunities in Melbourne.</td>
<td>22-26 August 2022, Melbourne, Australia</td>
</tr>
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<tr>
<td>World Indigenous People Conference on Education (WIPCE)</td>
<td>The World Indigenous People Conference on Education (WIPCE) is an opportunity for indigenous education leaders from across the globe to share successes and strategies for culturally grounded education.</td>
<td>26-30 September 2022, Auckland, New Zealand</td>
</tr>
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<table>
<thead>
<tr>
<th>TRAVEL &amp; SALES OPPORTUNITIES</th>
<th>DESCRIPTION</th>
<th>EVENT DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Manager Forum</td>
<td>March 2022, HTO Australia &amp; HZ will be offering opportunities for product managers to work together and market products.</td>
<td>HTO contact: <a href="mailto:info@hawaiitourism.org.au">info@hawaiitourism.org.au</a></td>
</tr>
<tr>
<td>Travel Expo</td>
<td>Q3 2023, HTO will work with Australia/HZ travel to support a range of travel agents throughout the year, providing new opportunities.</td>
<td>HTO contact: <a href="mailto:info@hawaiitourism.org.au">info@hawaiitourism.org.au</a></td>
</tr>
<tr>
<td>Media Fair</td>
<td>Q3 2023, HTO will work with Australia/HZ travel media to support a range of travel agents throughout the year, providing new opportunities.</td>
<td>HTO contact: <a href="mailto:info@hawaiitourism.org.au">info@hawaiitourism.org.au</a></td>
</tr>
<tr>
<td>Regenerative Tourism Family</td>
<td>In conjunction with Hawaii Tourism Authority, HTO will work with agents to support travel agents throughout the year, providing new opportunities.</td>
<td>HTO contact: <a href="mailto:info@hawaiitourism.org.au">info@hawaiitourism.org.au</a></td>
</tr>
</tbody>
</table>

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<th>EVENT DETAILS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry discounts</td>
<td>Year round, HTO offers a variety of discounts for travel agents.</td>
<td>All islands</td>
</tr>
</tbody>
</table>

For more information on how to book your travel to Hawaii, visit the Hawaii Tourism website.
PARTNERSHIP OPPORTUNITIES

TRAVEL TRADE EDUCATION

MONTHLY DESTINATION TRAINING

- From May, 2019 & Year round
- TBC

PARTNERSHIP OPPORTUNITIES - Travel 
- Industry professionals - newsletter

TRAVEL TRAD - Yearly
- Weeklong training sessions with travel agents across Australia and New Zealand.
- Includes industry updates - eg. new targeted products, general brand updates.
- Website: www.hawaiitourism.com.au
- Social Media: Instagram, Facebook, Twitter, LinkedIn
- www.hawaiitourism.com.au

PANAMA TOURISM
- Year round
- HTD will develop a unique profile to provide updates and
- destination information to the travel industry. You're looking
- to your requests, events and updates you can communicate to
- our trade partners.

HAWAIIAN REGIONAL MEDIA
- Year round
- HTD produces a range of travel guides under the following titles:
  - Hawaii Travel Guide
  - Hawaii Beach Travel Guide

CONSUMER PROMOTIONS

- More information on booking deadlines, exclusions and cost. Check out our website http://www.hawaiitourism.com.au
MAHALO!