



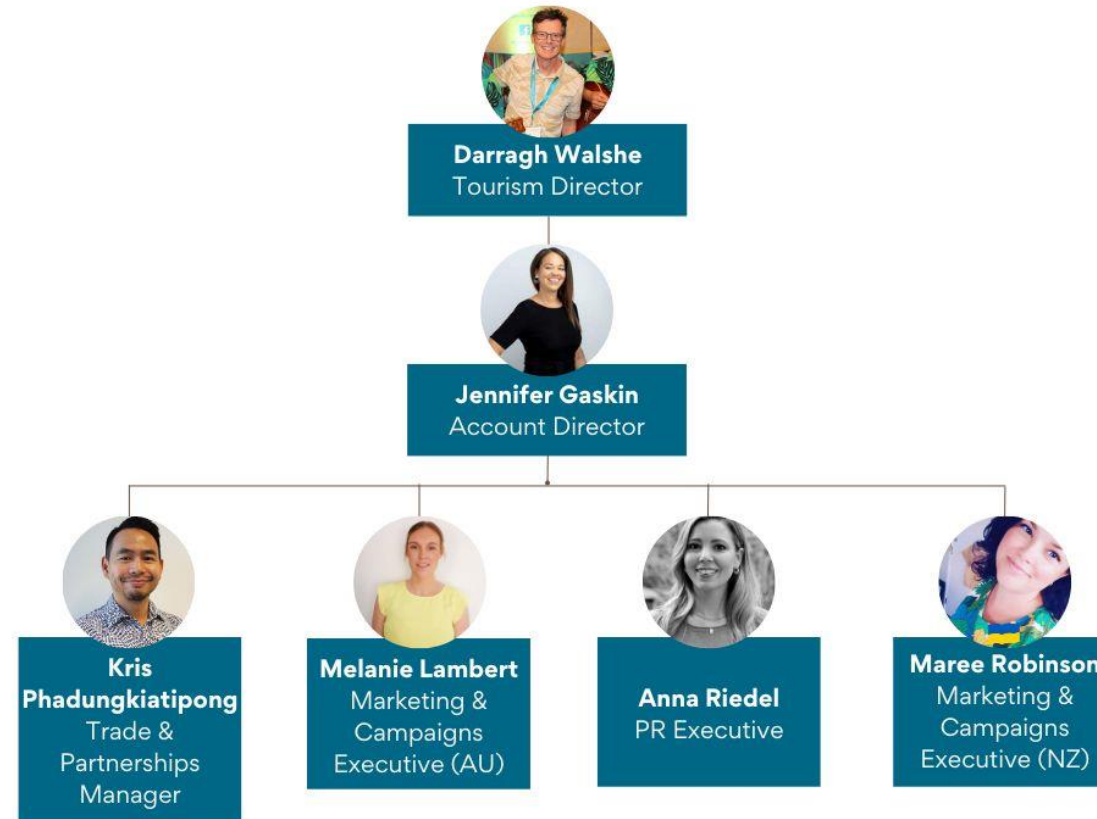
2023 Brand Management Plan (BMP) & Destination Management Support Plan (DMSP)

15 Pepeluali 2023

15 February 2023

Darragh Walshe
Tourism Director, HTO

HAWAII TOURISM OCEANIA TEAM



2023 BMP BRAND MANAGEMENT PLAN



MARKET SITUATION

MARKET SITUATION

General economy

- While Australia will likely avoid a recession next year, the OECD believes the Reserve Bank will hike up interest rates another 1.25 per cent
- Rising inflation, rising interest rates, hikes in fuel costs and falling wages are having an impact on many Australians and New Zealanders. However, unemployment remains low at 3.4%.
- The Australian and New Zealand dollar has remained low against the USD for much of 2022 and is currently trading at 0.66 cents. The 'Big 4' major Australian banks have predicted a slight increase for 2023, with an expected range between 65 and 70 US cents.

MARKET SITUATION

Outbound travel/boarder restrictions

While borders reopened in November 2021, restrictions around vaccinations and quarantine remained in place until July 2022. In addition, airline capacity is much lower than 2019, with around 45% less capacity from Australia in 2022 versus 2019.

The top five destinations visited saw a change to previous years:

Australia

2019	2022
New Zealand	New Zealand
Indonesia	USA
USA	India
UK	UK
China	Fiji

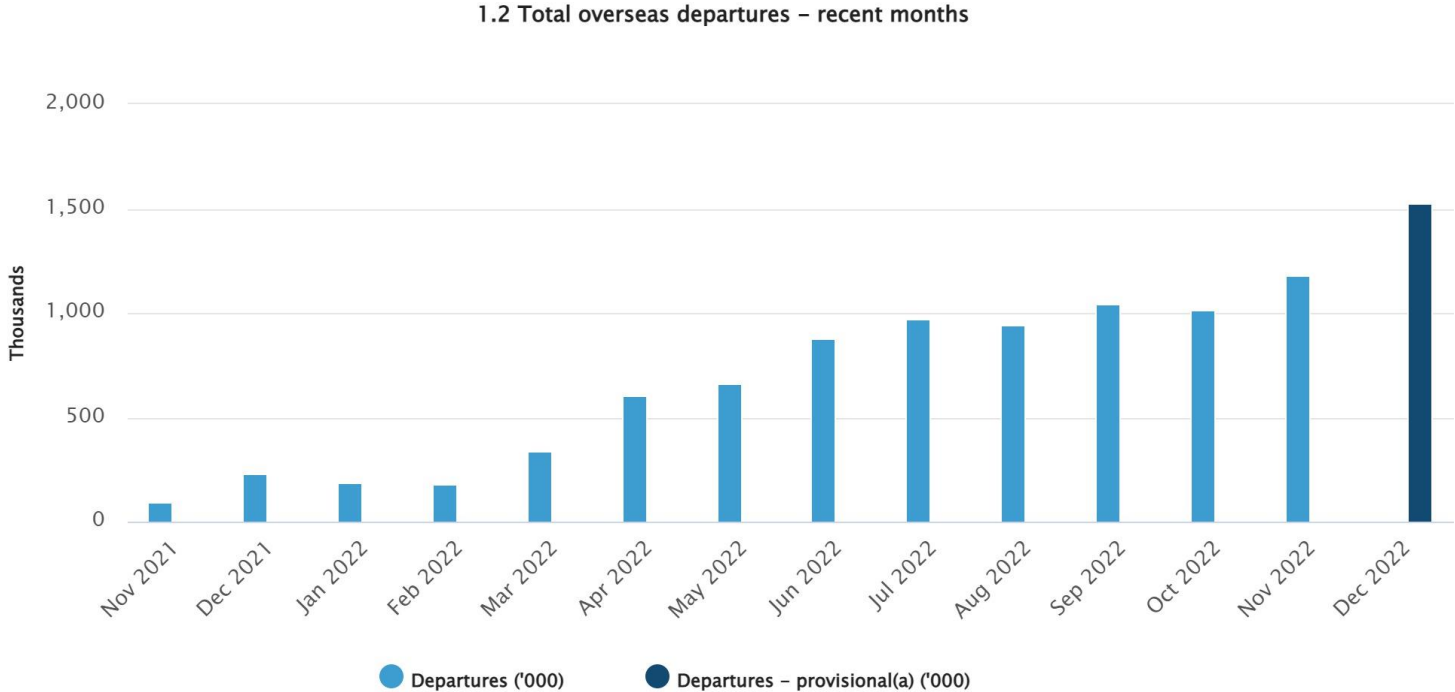
New Zealand

2019	2022
Australia	Australia
USA	Fiji
Fiji	Cook Islands
China	UK
UK	USA

MARKET SITUATION

General travel sentiment

Australia



a. Provisional data for the most recent month has not had the full quality assurance methods applied as is done for the earlier months. Provisional data will be revised in the next issue of this publication.

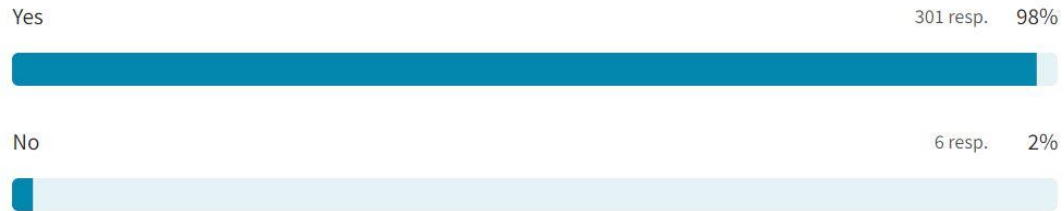
Source: Australian Bureau of Statistics, Overseas Arrivals and Departures, Australia November 2022



Consumer travel survey

Do you intend to visit Hawai'i in the future?

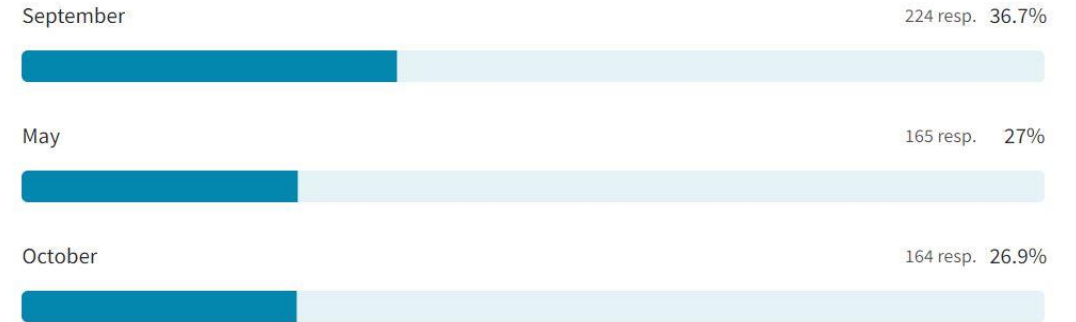
307 out of 635 answered



MARKET SITUATION

Which is your preferred month to travel?

610 out of 635 answered

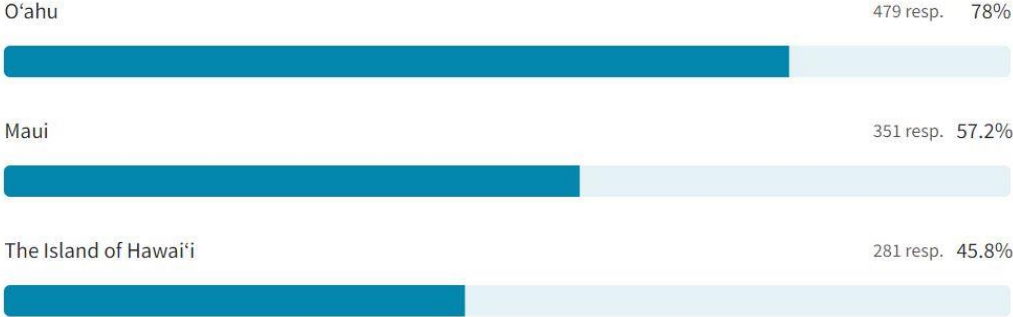


MARKET SITUATION

Consumer travel survey

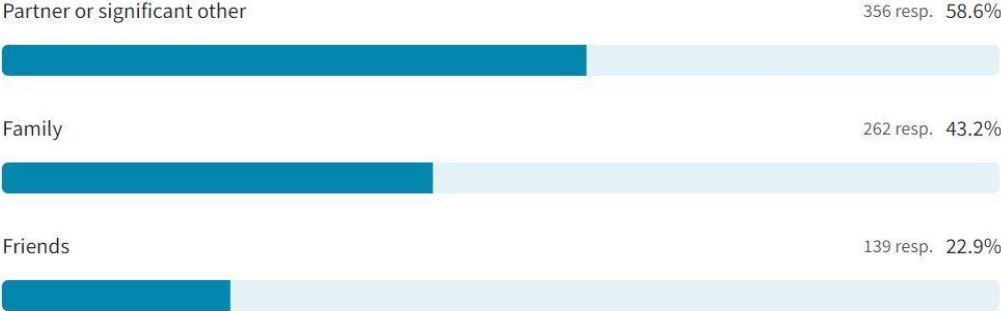
Which island(s) do you most want to visit?

614 out of 635 answered



Who do you plan to travel with?

607 out of 635 answered

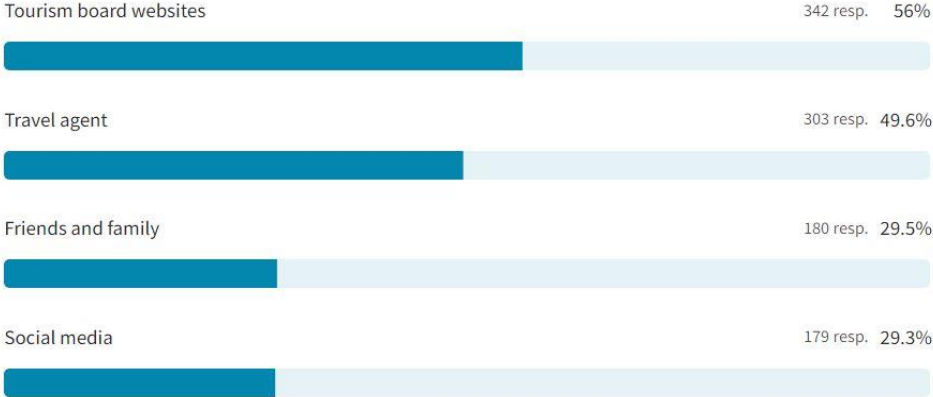


MARKET SITUATION

Consumer travel survey

Which of the following methods do you use to plan your future holidays?

611 out of 635 answered



Which, if any, would be reasons for not visiting Hawai'i?

587 out of 635 answered



MARKET SITUATION

Air seat synopsis



MARKET SITUATION

Competitive landscape



- High awareness
- Easy and safe
- Short flight
- Large-scale post-Covid consumer campaigns
- New brand campaign and website with focus on culture



- High Awareness
- Cheaper travel
- Low-cost airlines
- Short flight
- Ease of travel



- High awareness
- Just launched multi-million dollar outdoor and digital ad campaign



- High awareness
- Most popular USA destination
- Road trips and multi-destination itineraries
- Theme parks



TARGET AUDIENCE

TARGET AUDIENCE

Fun & Fit families

Looking for a safe and cost-effective holiday destination during the main school holidays. The destination needs to have activities that tick the box for every member of the family. Relaxation and food and drink experiences for the adults, active soft adventure for the kids and cultural activities that provide learning and cultural immersion opportunities for everyone.

Key Needs

- Hotels with room configurations or inter-connecting rooms suitable for children
- Hotels with facilities and activities for children
- Authentic, high-quality culinary experiences
- Easily accessible outdoor, soft-adventure activities
- Opportunities to connect with local culture and interact with local people

Examples of Key Experiences

- Manta ray snorkel
- Lē'ahi hike
- Volcanoes National Park



TARGET AUDIENCE

Curious couples

While our couples' segment has traditionally skewed older, research shows that younger couples are more likely to be mindful and responsible travelers. Couples who are double income, no kids (DINKS) have successful careers and no family responsibilities and spend the most on themselves of any demographic.

Key Needs

- Experiences are the key driver for this demographic, authentic cultural experiences, outdoor activities and unique food and drink offerings
- This demographic is likely to choose hotels that are modern and well located, preferring boutique hotels where possible.
- Sustainability and traveling responsibly is important to these couples and they want to find opportunities to give back during their vacation

Examples of Key Experiences

- Exploring Kaka'ako
- Kilohana Plantation rum safari
- Gunstock ranch ATV and tree planting
- Community festivals and events



2023 STRATEGY



STRATEGY

Core branding message for 2023



Connection

By delving deeper into the relationships Hawaiians have with the land, the ocean and their culture, we'll be giving visitors a deeper understanding of why the Hawaiian Islands are so special and how visitors also play a role in their protection and regeneration.



Culture

The spirit of aloha, cherished traditions, history, and culture are what make Hawai'i unique. Our activities aim to build a deeper connection between the visitor and the Hawaiian Islands by sharing these deep-rooted cultural traditions.



Culinary

Post-Covid, food and drink is emerging as one of the strongest trends in travel. Travelers are seeking culinary adventures to sample authentic ingredients, cuisines and drinks, and to dive deep into the kaleidoscope of flavors, textures and stories of the people, process and place that go into them.

KEY CAMPAIGNS/PROGRAMS



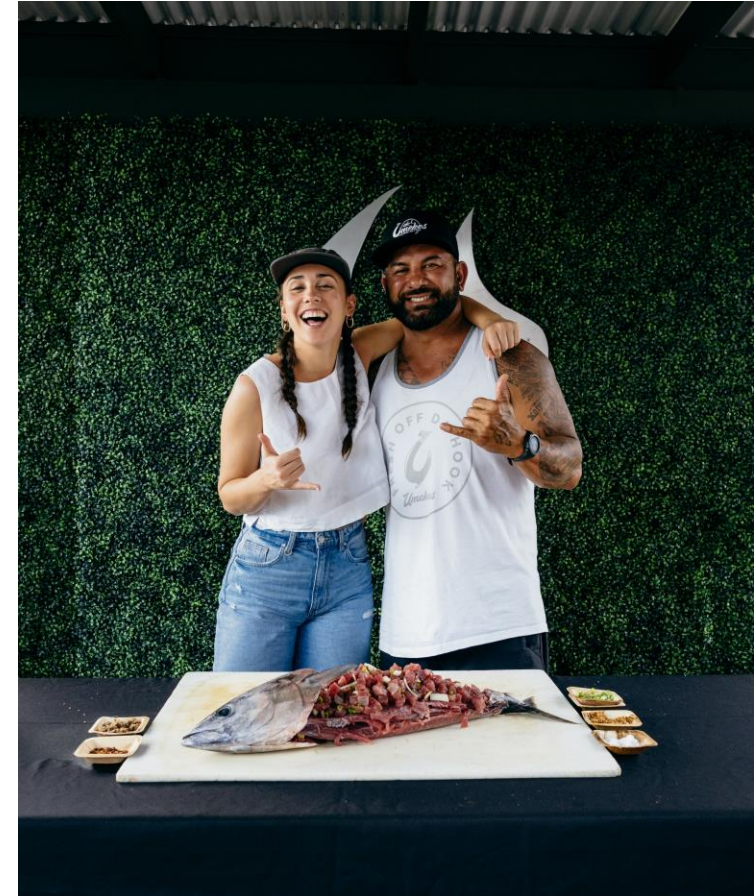
KEY CAMPAIGNS/PROGRAMS

Connections campaign

Hawaii stands out against other destinations because the heritage, culture and spirit of aloha epitomize what it means to live harmoniously with the land. To communicate this philosophy, we will work on a series of short videos that specifically highlight the people of Hawai'i, their connection to the land, ocean and mountains and how the visitor can experience and be a part of this special bond.

We will use talent from Australia and New Zealand who will play the part of 'the visitor'. They will be shown taking part in tourism experiences that have cultural significance, giving us the opportunity to delve deeper into Hawaiian culture and the opportunity to communicate many of the DMAP action points.

The videos will be housed on a micro site which will also have written articles, suggested itineraries and destination information. All Hawaiian Islands will be a part of this project and there will be a special focus on responsible tourism.



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.

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



KEY CAMPAIGNS/PROGRAMS

Month of Lei

We'll use Lei Day and the Month of Lei as an opportunity to bring each distinct island personality to life. We will do this through a series of trade training events with the Island Chapters in Sydney, Brisbane, Melbourne and Auckland. We will also launch an incentive famil campaign through trade media, giving five agents who book multi-island itineraries the chance to win a famil to Hawai'i.

Month of Lei will also incorporate consumer elements, including social media content and an Expedia co-op campaign.

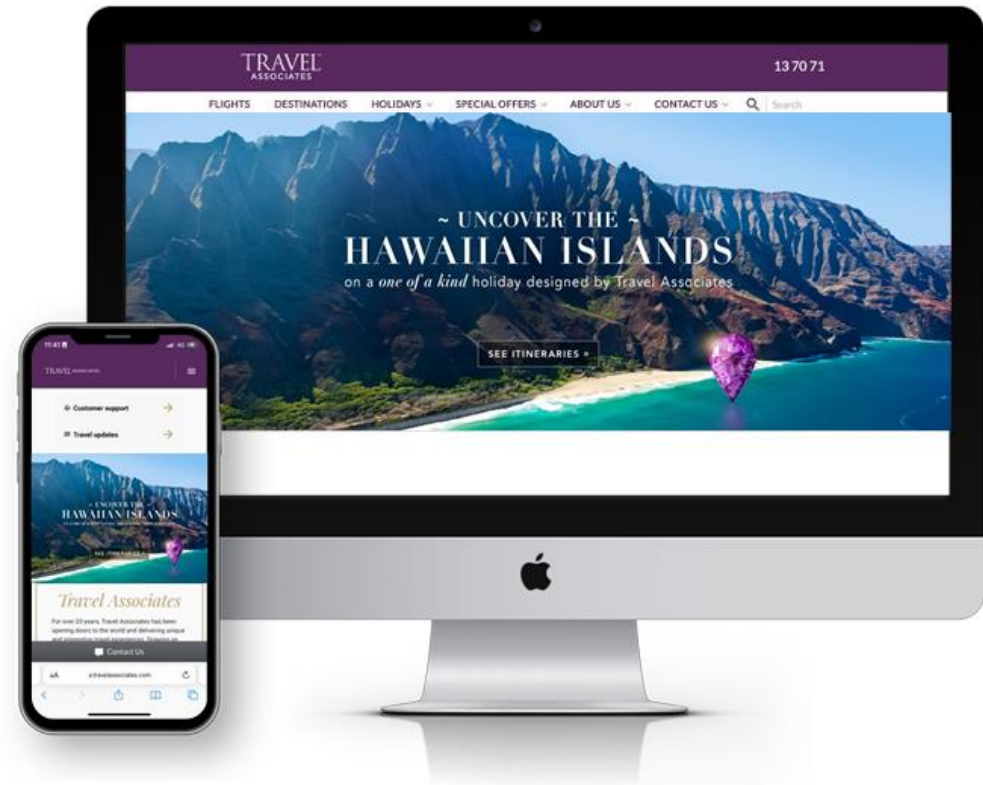


KEY CAMPAIGNS/PROGRAMS

Travel Associates

We will work with Travel Associates again this year on a series of activity including attending their product showcase event, a co-op campaign, famil and attendance at their new consumer event in Sydney.

Working with Travel Associates allows us to tap into the luxury market and we will work with them on a downloadable guide as part of the co-op campaign.



KEY CAMPAIGNS/PROGRAMS

Māori Television travel series launch

The 10 part series is entitled “Tapuwae-Footprints” and in summary:

- looks at the unique approach of indigenous tourism
- tells the stories of Māori and Hawaiian tourism operators and their kaupapa (ideology) that sets Aotearoa and Hawai’i apart from the rest of the world.
- 10 Hawaiian indigenous tourism operators/experiences are being showcased



HAWAII TOURISM
OCEANIA

KEY CAMPAIGNS/PROGRAMS

Agri-tourism trade project

This year, in line with the DMAP action points and our key themes of connection, culture and culinary we will work of the development of agritourism. The objective of this will be to introduce the Hawaiian Islands as an agritourism destination and to identify and work with specialist tour operators to develop agritourism product for sale in market.

Made in Hawai'i project

This project focusses on promoting Hawai'i made products in Australia and New Zealand. Working alongside the US Consulate and the Hawaiian Department for Agriculture and trade, the objective is to have a selection of Hawai'i made products on sale in Oceania.



Q1 ACTIVITIES

- Newcastle Travel Expo
- Flight Centre co-op
- We Are Explorers campaign
- MyHawaii co-op
- Travel Associates showcase
- Ohana updates AU&NZ
- Visit USA roadshow
- Brand USA B2B
- Ocean Film Festival sponsorship
- TODAY show
- IMM
- Consumer campaign “connections”
- ADU venues and collateral
- Māori TV project

PARTNERSHIP OPPORTUNITIES

hawaiitourismauthority.org/what-we-do/partnership-opportunities/



PARTNERSHIP OPPORTUNITIES

Media Market Place	Feb 2023	HTO's annual 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.	TBC	Partners' travel agencies/information for travel journalists and media. HTO contact: Anna Riedel ariedel@hawaiiitourism.com.au
Aloha Down Under	4-11 Sep 2023	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. For more information visit www.alohadownunder.com.au . EOI will be sent out to partners in February 2023.	Auckland, Christchurch, Melbourne, Brisbane and Sydney	Participation Fee - approx. AU\$5500 + GST & travel costs For more information contact: kphadung@hawaiiitourism.com.au jgaskin@hawaiiitourism.com.au dwalsh@hawaiiitourism.co.nz
Sea Cleaners	TBC Sep 2023	In commemorating International Coastal Cleanup Day, HTO will partner with Sea Cleaners, a non-profit organization, Hawaiian Airlines, Visitors Bureaus and Sustainable Coastlines Hawai'i to raise the awareness about the impact of plastics in the ocean and to engage with local community in various voluntourism on the Hawaiian Islands.	TBC	In-kind support for accommodation and ground activities. HTO contact: dwalsh@hawaiiitourism.co.nz

Agri Tourism Famil	TBC April 2023	This will be an opportunity to showcase Agri-tourism in Hawai'i with the objective of developing products for new trade partners.	Multi-Islands	In-kind support as accommodation, transportations, activities, and meals HTO contact: jgaskin@hawaiiitourism.com.au
Trade Travel Agents Famil	TBC 2023	Trade agents famil will be created in conjunction with HTO Month of Lei campaign to promote Hawaiian Islands & Mālama Hawai'i Program among AU & NZ agents. Our main objective is to highlight Mālama Hawai'i Program, historical and educational activities for the agents that are well versed on Hawaii products and activities. HTO will also take this opportunity to showcase newly renovated properties and new experiences across the Hawaiian Islands.	Multi-Islands	In-kind support for accommodation, and ground activities. HTO contact: kphadung@hawaiiitourism.com.au
Media Famil	Q3 2023	HTO will work with Australian/NZ travel media to support a range of travel journalists throughout the year and partners will have the opportunity to get involved.	Multi-Islands	In-kind support as accommodations, transportations, activities, and meals HTO contact: ariedel@hawaiiitourism.com.au
Industry discounts for travel agents	Year round	HTO receives numerous inquiries regarding industry discounts for travel agents' personal holidays to Hawai'i. This is a great self-famil 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 2023, or if you have a dedicated person that can handle industry requests, please let us know the details by Jan 31, 2023, by filling in the attached Travel Trade Discounts form: 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

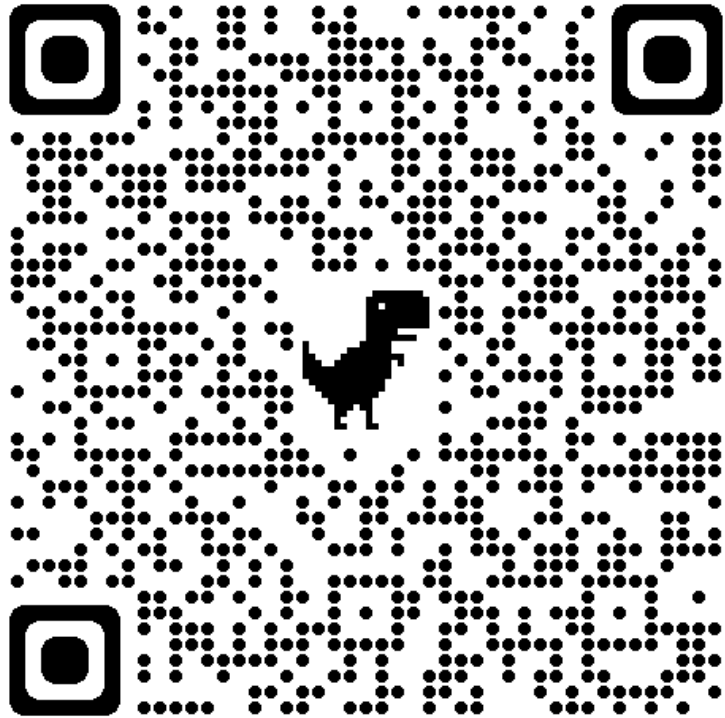
PARTNERSHIP OPPORTUNITIES

Month of Lei 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, & Auckland	IC specific, although industry may want to contribute prizes HTO contact: dwalshe@hawaiiitourism.co.nz
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.	Online	Free opportunity. If you would like to be featured, please send a paragraph of a copy (max 50 words), image and web link to Mel. HTO contact: mlambert@hawaiiitourism.com.au
Travel Agent Training Program/Webinars	Year-round	HTO undertakes regular training sessions with travel agents across Australia and New Zealand.	Australia & New Zealand	Please send through industry updates – eg new/changed product; general island updates. HTO contact: kphadung@hawaiiitourism.com.au
Aloha Fridays Trade feature: Travel Weekly, KarryOn & 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.	Australia & New Zealand	Free Opportunity. If you would like to be featured, please send Info and images to jgaskin@hawaiiitourism.com.au or dwalshe@hawaiiitourism.co.nz Link to Aloha Friday Pages: http://www.travelweekly.com.au/tag/aloha-down-under/ http://www.travfiles.co.nz/region/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.	Australia & New Zealand	Free Opportunity. If you would like to be featured. HTO contact: jgaskin@hawaiiitourism.com.au

Visiting media program	Year round	Throughout the year, HTO hosts a <u>number of</u> 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
Media releases	Year round	HTO sends out multiple press releases and media updates and undertakes media calls throughout the year. Partners have <u>the opportunity</u> to provide their own press releases and product updates for inclusion	n/a	No cost. Please send your press releases and updates to <u>HTO</u> contact: Ariedel@hawaiiitourism.com.au dwalshe@hawaiiitourism.co.nz
HTO Blog and social networks	Year round	HTO reach out to past, present and potential Australian and New Zealand visitors to <u>Hawai'i</u> 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. HTO contact: mlambert@hawaiiitourism.com.au

OCEANIA FACT SHEET

hawaiitourismauthority.org/research/monthly-visitor-statistics/



MAHALO!

