

An aerial photograph of the Hawke's Bay region in New Zealand. The image shows a vast expanse of blue water meeting a sandy beach. To the right of the beach, there are rolling hills and fields, some of which are covered in golden-brown crops, likely corn. A large, modern building with a green roof is visible in the middle ground. The sky is a clear, pale blue with a few wispy clouds.

Hawke's Bay Tourism Annual Report for FY21

WWW.HAWKESBAYNZ.COM



General Overview

The 2020/21 financial year has been one of the more extraordinary for Hawke's Bay Tourism. In the most challenging environment for tourism, the increased central government support and investment has assisted us in achieving the best visitor spend results ever.

It is acknowledged that not all businesses have benefited from the domestic spend – those whose experiences were targeted and developed for international consumers and cruise passengers, have hibernated or reinvented themselves.

Pre-Covid, Hawke's Bay's market majority was 75% made up of domestic visitors, therefore those experiences with domestic appeal have achieved results above forecasts.

Compared with other regional tourism organisations, Hawke's Bay Tourism was, in many ways, Covid- ready. We had developed a strong competitive positioning statement for the region – "Food and Wine Country"; we had agreed to a domestic market focus – with particular emphasis on Wellington; and we have a demand-led strategic direction as other regions move to destination development strategies. We were one of the first regions out of the gate with a marketing campaign – the 'Hawke's Baycation' initiative – as the country started to emerge from level 4, 3, and 2 lockdowns.

Our team has worked hard to promote and reinforce our destination's reputation for great experiences and superb holidaying conditions. We've hosted media from around the country, and Australia. We've maintained travel trade relationships, and upweighted our focus and activity to the domestic business events sector with good results -

supporting the significant local body investment in conference and venue infrastructure.

We've delivered our own F.A.W.C! Food and Wine Classic, Big Easy, and Spring Fling annual events, and supported other key Hawke's Bay events.

We've had the opportunity to explore a regional project with a broad remit to strengthen Māori identity and visibility through the visitor economy within our regional brand framework (working title Destination Te Matau-a-Māui).

We've been well supported by our partners and are grateful that they have joined with us investing in joint marketing initiatives and partnering us with complimentary experiences when hosting media, travel trade, and business event organisers.

On behalf of the Board, and staff, Hawke's Bay Tourism wishes to thank Hawke's Bay Regional Council for their abiding funding and political support; Ministry of Business, Innovation and Employment for their strategic tourism protection funding; the Board and members of the Hawke's Bay Tourism Industry Association for their investment and support; our region's city and district councils for their support and encouragement; national and regional tourism organisations we partner with; and we would like to thank all of the visitors who have experienced the region for the first time – and those who have returned.

Key Performance Indicators

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KEY PERFORMANCE INDICATOR	MEASURE		PERFORMANCE
Visitor spend, benchmarked against national performance. Data provided by MBIE's Tourism Electronic Card Transactions.	Grow our share to at least 3% of Domestic TECT spend		✓ Tracking at 3.67% to Y/E June 21
Increase industry contribution	\$200k cash \$50k in kind Increased membership # Increased Industry Facebook #		✓ Cash = \$726k \$542k STAPP funding from MBIE \$65k visitor guides advertising \$35k Tourism NZ business events \$35k Regional Events Fund \$20k Havelock North Business Assoc. \$20k HB travel trade operators \$9k HB business events operators ✓ Contra = \$316k \$246k advertising support from Stuff Travel \$43k support for media famils \$15k support for trade famils \$12k support for BE famils Since JUL '20: ✓ 14 new members ✓ 6 new web listers ✓ 15 new web listings ✓ 29 new HBTIA Facebook #s (458)

Green – KPI met; Amber – partially met; Red – not met

Key Performance Indicators *cont'd*

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KEY PERFORMANCE INDICATOR	MEASURE		PERFORMANCE
Develop membership engagement on climate change mitigation and adaptation – environmental sustainability. Increase in members signing up to Tourism Industry Aotearoa's "Tourism Sustainability Commitment"	No less than 50 members signed up to TIA Sustainability Commitment		<ul style="list-style-type: none"> ✓ c. 49 members signed up ✓ Attended tourism regeneration hui. ✓ Appointed Tourism Sustainability champion within organisation.
Industry advocacy. Support existing tourism operators to develop new products, and expand into new markets	Align to values of NZ Māori Tourism Deliver annual series of workshops to build industry capability Support Hawke's Bay Regional Council with tourism expertise and support		<ul style="list-style-type: none"> ✓ Meeting with NZ Māori Tourism, NOV 2020 ✓ 2 x kōrero with Hawke's Bay Māori Tourism ✓ Kōrero with Ngahiwi Tomoana ✓ Commencement of Cultural Brand Framework mahi (working title Destination Te Mata-a-Māui) ✓ 10 workshops delivered in JUL/AUG ✓ Ongoing support of HBRC
Tourism operators value Hawke's Bay Tourism's leadership and contribution to growth of industry	Annual survey that includes environmental sustainability		<ul style="list-style-type: none"> ✓ 87% feel supported by HBT during pandemic.
Lead the development of a regional visitor strategy for Hawke's Bay	Commence implementation of regional visitor strategy with key stakeholders.		<ul style="list-style-type: none"> ✓ Infrastructure adequacy report completed. Commenced consultation on implementation priorities.

Green – KPI met; Amber – partially met; Red – not met

Tourism Electronic Card Transactions (TECT)

12 months to June 2021

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Annual TECT Spend Domestic
\$410.9m
vs 12 months to June 2020
↑36.4%
RTO ranking
12 of 31 (3 th in NI)
vs 12 months to June 2019
↑28.0%

Annual TECT Spend Other/International
\$20.6m
vs 12 months to June 2020
↓58.2%
RTO ranking
9 of 31
vs 12 months to June 2019
↓61.2%

Annual share of all Domestic TECT Spend
3.67%
Last year
3.49%

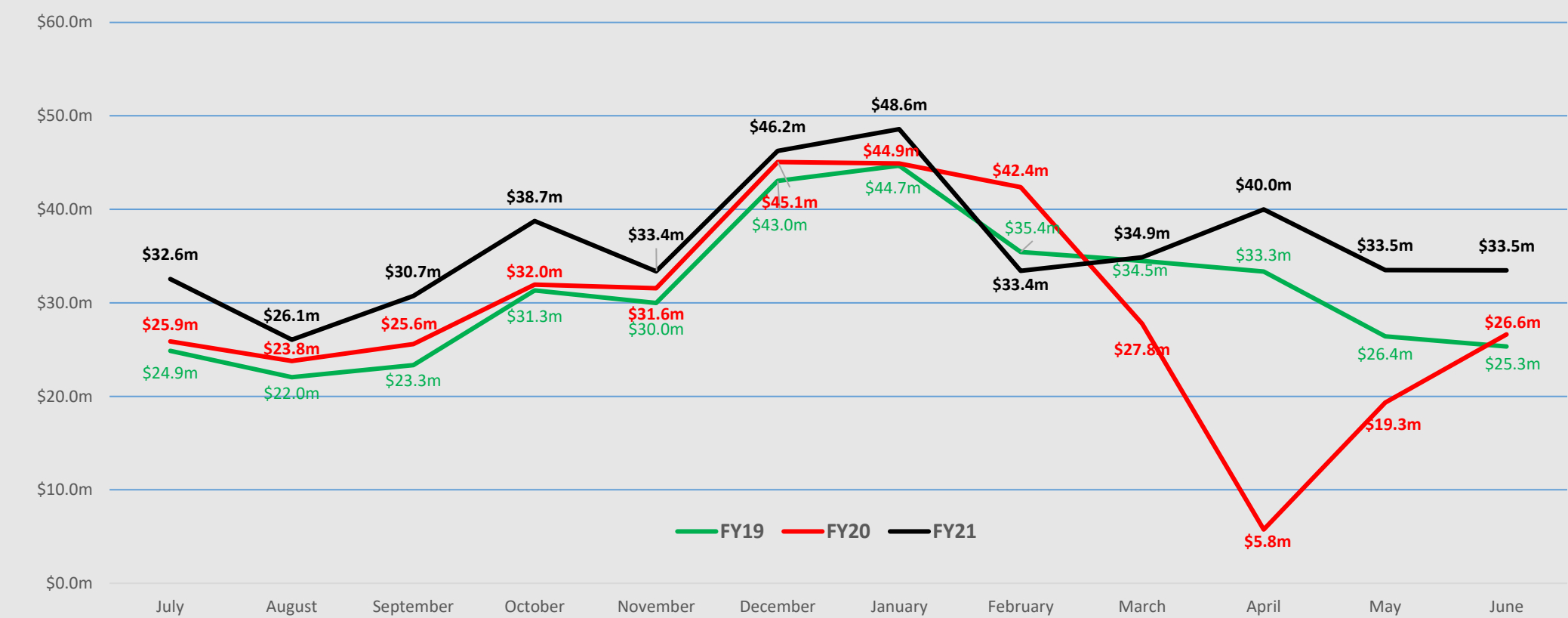
Annual share of Wellington Spend
5.93%
Last year
5.59%

Annual share of Auckland Spend
2.88%
Last year
2.70%



Tourism Electronic Card Transactions

11 of 12 months were records



Statistics – Accommodation

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FY21 Occupancy Overall
52.2%
Last year
N/A (new survey)
National occupancy
42.0%

FY21 Occupancy Hotels
69.4%
Last year
N/A (new survey)
National occupancy
54.7%

FY21 Occupancy Motels & Apartments (>20)
80.1%
Last year
N/A (new survey)
National occupancy
60.5%

FY21 Occupancy Motels & Apartments (6-20)
81.1%
Last year
N/A (new survey)
National occupancy
61.0%



FY21 Occupancy Backpackers
37.8%
Last year
N/A (new survey)
National occupancy
34.2%

FY21 Occupancy Holiday Parks & Campground
36.2%
Last year
N/A (new survey)
National occupancy
25.4%

FY21 Occupancy Lodges & Boutique
49.9%
Last year
N/A (new survey)
National occupancy
38.0%

Note, regions with small datasets for accommodation types are excluded from published data

Consumer Marketing

HBT Annual Report FY21

Autumn campaign

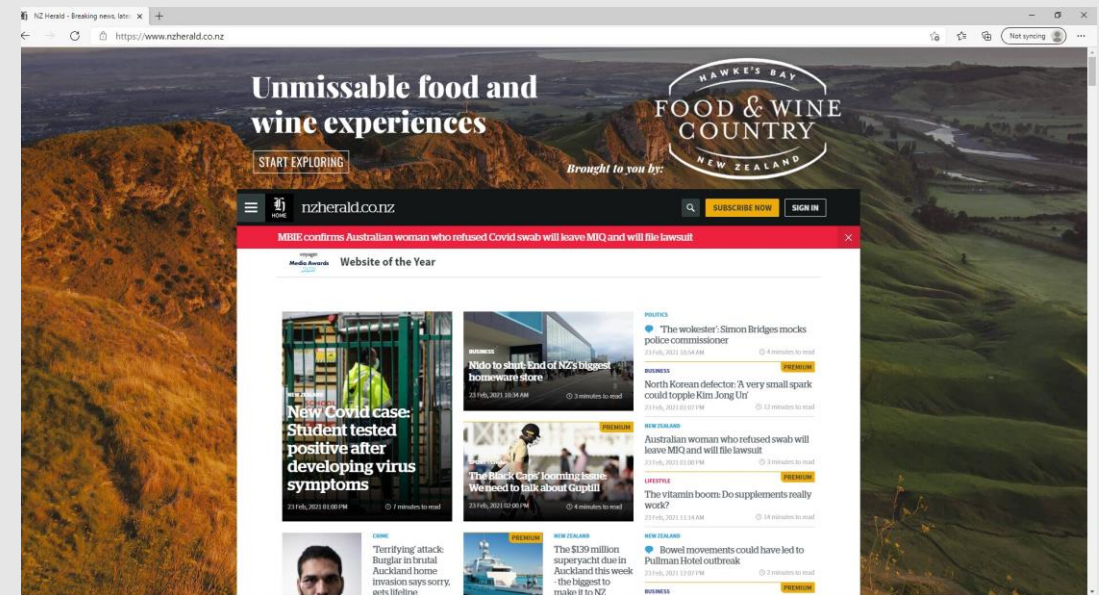
Followed on from the post-lockdown campaign, progressively introducing a more direct reference to Food and Wine Country whilst still retaining the Hawke's Baycation message. Targeted Wellington and Manawatu. Channels included out of home, radio, On Demand, social and digital with **\$150k** spend.



Spring campaign

A full launch of the Food and Wine Country positioning, targeting North Island audiences. **\$170k** spend including reverse cover of NZME Travel magazine, homepage takeover of nzherald.co.nz, video assets for On Demand and YouTube, social, radio, digital and weather targeted ads.

Havelock North Business Association approached HBT to deliver a **\$20k** campaign on their behalf, which was developed to 'ride on the coattails' of HBT's autumn activity by aligning their campaign timing and creative, while also benefiting from the buying power of our media agency.



Consumer Marketing

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WANDR Travel + Stuff Travel + Mediaworks campaign

A final campaign for the financial year saw HBT partner with a collective of media partners including WANDR Travel, Stuff and Mediaworks, to be their launch region for an integrated campaign model which delivered aligned editorial and advertising across all three media partners at the same time.

This **\$100k** campaign achieved significant media profile across print, out of home, radio and digital channels, including several 'firsts' for each of the media companies. An example of this was the full-day Hawke's Bay 'takeover' of The Breeze radio station.

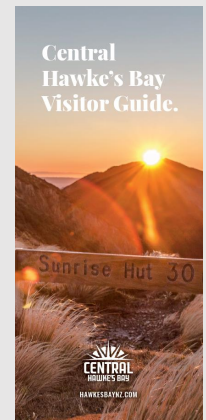


Hawke's Bay Visitor Guides

A slimmed-down Visitor Guide was developed, which sought to optimise content for a largely domestic audience. Print volumes across all guides were also reduced given the lesser reliance on printed collateral by domestic visitors – although consumer demand for the Hawke's Bay Trails map remained particularly strong.

40k Visitor Guide
25k Hawke's Bay Trails
10k Wine & Food Map
20k Central Hawke's Bay

\$65k
advertising support
from industry



Digital Channels summary *(primary HBT channels)*

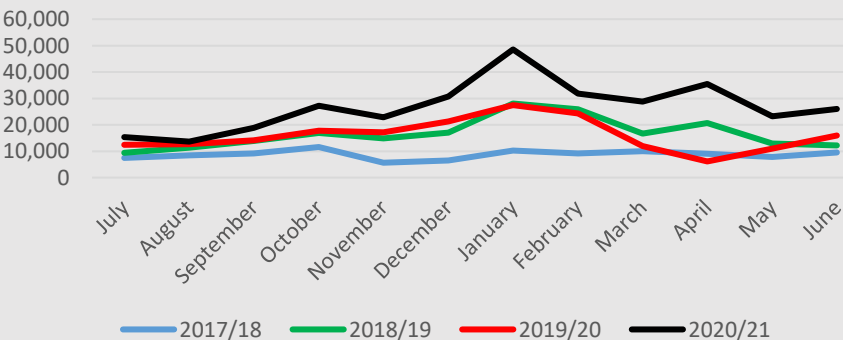
721,314
TOTAL sessions on
hawkesbaynz.com

+52%
vs FY20

BEST
EVER!

327,879
ORGANIC sessions on
hawkesbaynz.com

+70%
vs FY20



Each month was a record 🙌

391,791
pageviews on
operator listings

And the winner for
the most views is:
Morere Hot Springs
****12,162****

100k Facebook
likes



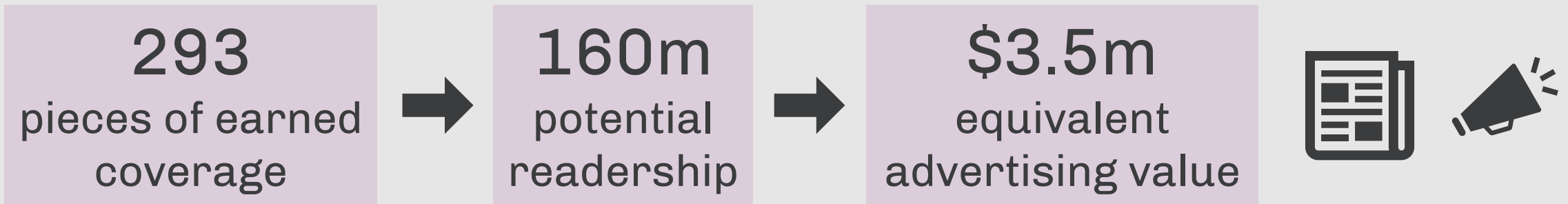
11.6k Instagram
followers



21.6k database
subscribers

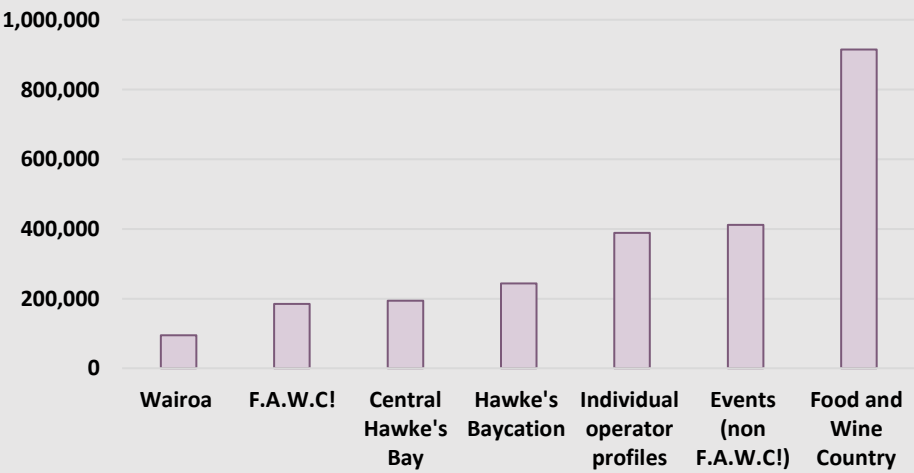


Public Relations

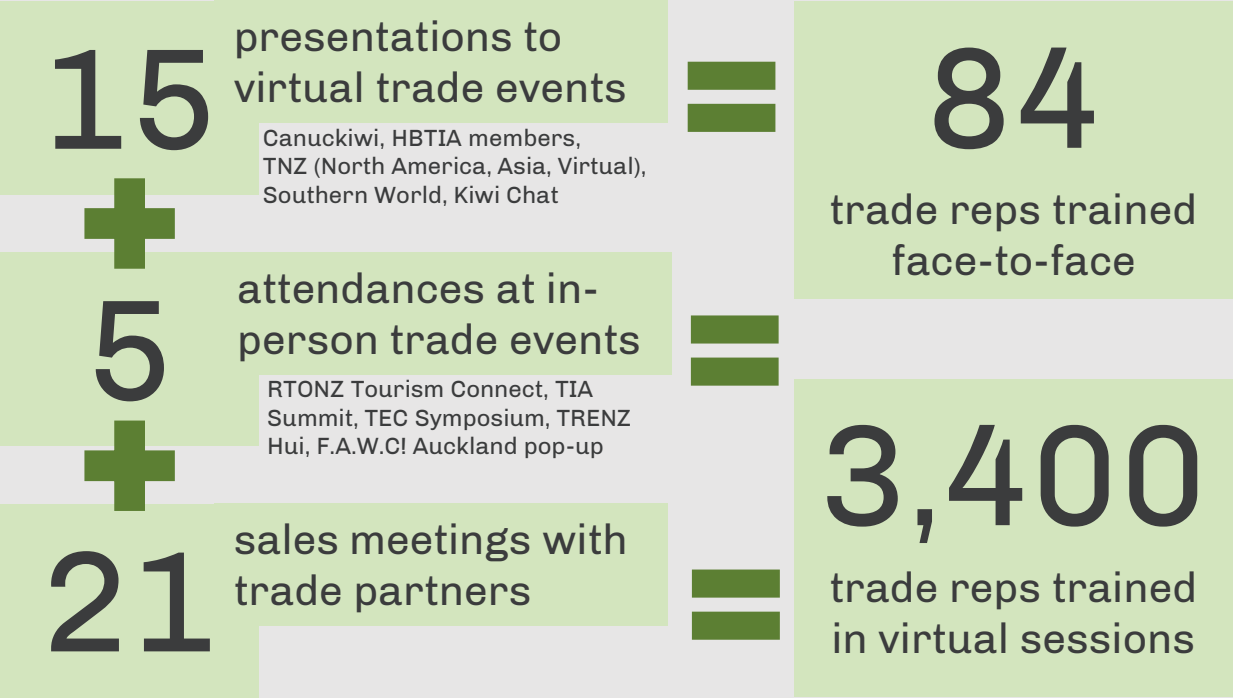


22 famils = media visiting every 2 ½ weeks

Industry Support		
Operator contra for media famils	Stuff Travel advertising support	Stuff Travel editorial support
\$42.5k	\$113k	\$133k



Travel Trade



PARTNERSHIP ACTIVITY WITH

- Havelock North Business Association on a domestic campaign
- eXplore Central North Island for virtual participation in international events
- Classic New Zealand Wine Trail on Australian activity

Industry Support

Contra	Cash
\$14.8k	\$20k

Hosted **5** trade famils
with **17** attendees

TNZ Premium, TNZ North America, House of Travel,
ANZ Nature Tours, Mediaworks & Wandr Travel

Other highlights:
Establishing bi-monthly Trade Marketing Group meetings • formed Air New Zealand Grabaseat relationship resulting in packages for Bridge Pa Wine Festival, Six60, Walk of Wonders, Takaro Trails multi-day tour, Winter Weekend getaway • Developed trade training resources • 4x visits to Central Hawke's Bay • 2x visits to Wairoa

Business Events



BIDS assisted	CONFIRMED	PENDING
33	15	7
Economic Impact	\$1.3m	\$2.9m

Industry Support		
Contra	Cash	TNZ Funding
\$12.4k	\$8.7k	\$35k

COMPLETED: website redesign • videography & photography • destination video • digital business events planner • bid template • trade activity
UNDERWAY: create image library • incentive programme case study • commission MICE editorial

Business Events Advisory Group
Established regular monthly meetings with key operators. Used to discuss direction, potential activities, share ideas, and generate support for HBT's Business Events activity.

4 famils w 7 attendees
BEIA destination focus, BEIA Conference & AGM recce, Natural Health Products, Meeting Newz

Consumer Events

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- ✓ 64 events
- ✓ \$256k ticket sales
- ✓ 92% rated Excellent or Good
- ✓ 27% of ticket sales to visitors
(excludes visitor tickets bought by locals)



- ✓ 48 events
- ✓ \$199k ticket sales
- ✓ 88% rated Excellent or Good
- ✓ 28% of ticket sales to visitors
(excludes visitor tickets bought by locals)

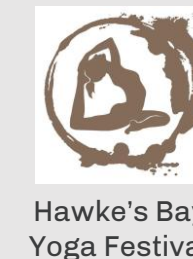


- ✓ \$54k ticket sales
- ✓ 93% rated Excellent or Good
- ✓ 42% of ticket sales to visitors
(excludes visitor tickets bought by locals)

Support & profile for regional events included:



New events
secured for
FY22



Central Hawke's Bay

HBT Annual Report FY21



- ✓ 15 events - down due to impacts of Covid-19
- ✓ \$37k ticket sales – \$10k up on 2019



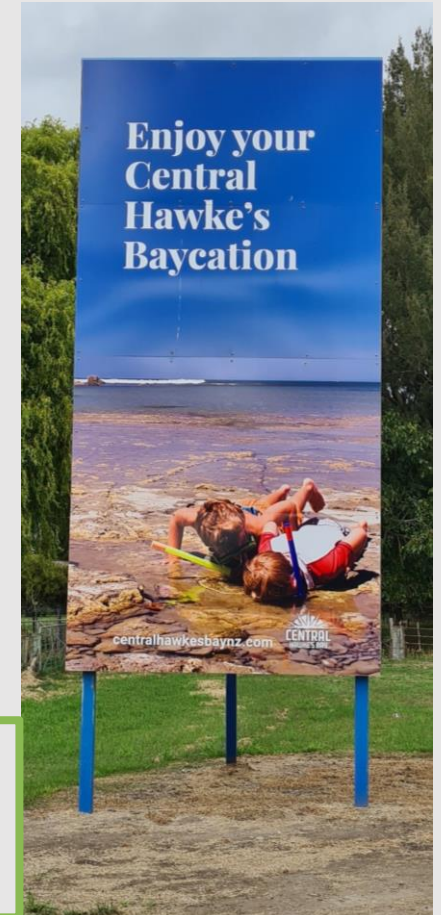
- ✓ 300 riders
- ✓ \$2.5k ticket sales
- ✓ 28% of ticket sales to visitors (excludes visitor tickets bought by locals)

31 members of Hawke's Bay Tourism – an increase of 11 on FY20.



A new district visitor guide was developed in response to a request from local businesses. The project was jointly funded by Hawke's Bay Tourism, Central Hawke's Bay District Council and operators. 20k copies were printed and distributed.

District gateway signs were refreshed in support of the Hawke's Baycation marketing campaign



Tourism Industry Membership

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203 full members of Hawke's Bay
Tourism Industry Association

and

148 additional web listers
on hawkesbaynz.com

458 members of Facebook
group for tourism industry



Developed first-ever HBT
membership prospectus



Māori Tourism

Additional funding this year has presented the opportunity to explore a regional project with a broad remit to strengthen Māori identity and visibility through the visitor economy within our regional brand framework (working title Destination Te Matau-a-Māui). We engaged Karl Wixon to support this due to his experience in the Māori tourism sector, and with Tourism New Zealand on their brands and campaigns.

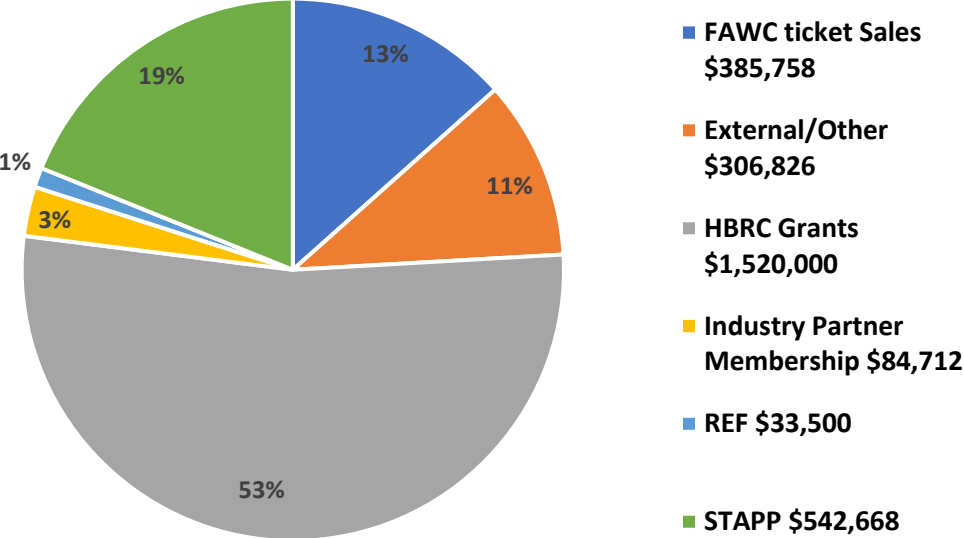
Funding recently confirmed for RTOs from central government via MBIE for the 21/22 financial year (Tourism Communities: Support, Recovery and Re-set Plan) has allowed us to continue with this mahi and commence furthering its potential.



FY21 Income sources

% of overall income

FY21 – total \$2.9m



FY20 – total \$2.1m

