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David Y. Ige Governor

John De Fries

President and Chief Executive Officer

HĀLĀWAI KŪMAU O KE KŌMIKE HOKONA KŪMAU KE 'ENA KULEANA HO 'OKIPA O HAWAI'I

REGULAR MARKETING STANDING COMMITTEE MEETING HAWAI'I TOURISM AUTHORITY

Poʻakolu, 28 ʻOkakopa 2020, 10:30 a.m. Wednesday, October 28, 2020 at 10:30 a.m.

Hālāwai Kikohoʻe VIRTUAL MEETING

Hiki i ka lehulehu ke hālāwai pū ma o ka ZOOM. Webinar will be live streaming via ZOOM.

Register in advance for this webinar:

https://zoom.us/webinar/register/WN r1qeQnZuSjCmTOqtlk4 NQ

After registering, you will receive a confirmation email containing information about joining the webinar.

Papa Kumumana'o – Ho'ololi 'Ia AMENDED AGENDA

- 1. Hoʻomaka A Pule
 Call to Order and Pule
- 'Āpono I Ka Mo 'o 'ōlelo Hālāwai
 Approval of Minutes of the September 23, 2020 HTA Marketing Standing Committee
 Meeting
- 3. Hō'ike A Expedia Group No Ka Heluna Makemake No Hawai'i
 Presentation from Kevin Sahara, Director, Hawaii, Market Management, Lodging,
 Expedia Group-media solutions regarding insight on market demand for Hawai'i by
 islands 2020 and 2021.
- 4. Hōʻike A Ka Luna Noiʻi 'Oihana Hoʻokipa No Nā 'Ākena Huaka'i Presentation by Jennifer Chun, HTA Director of Tourism Research regarding
 - a. Travel agents booking pace November, December 2020 and 2021
 - b. Countries with the US being on the "do not travel list" & "14-day quarantine"



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- 5. Hō 'ike A Ka Luna 'Ike Kūhohonu Mākeke No Nā Hui Mokulele Presentation by Jeffrey Eslinger, HVCB Senior Director of Market Insights, regarding airlines booking pace for November, December 2020 and into 2021.
 - a. What does load factor with COVID-19 safety protocol look like
 - b. Which airlines have their own Hawai'i approved testing program
- 6. Hō'ike A Hawai'i Tourism Oceania No Ke Kūlana Huaka'i Update regarding Hawai'i Tourism Oceania border closing
- 7. Hō'ike A Ka Luna Hokona No Ka 'Inikua Huaka'i
 Presentation by Jadie Goo, HTA Director of Marketing, regarding COVID-19 Travel
 Insurance updates and who offers this insurance.
- 8. Hō'ike A Hawai'i Tourism Canada No Ke Kūlana Huaka'i
 Presentation by Hawai'i Tourism Canada's Susan Webb, Country Director,
 regarding earliest flight scheduled, what in country initiatives are taking place to bring
 the borders down to travel to the US and the 14-day quarantine once the they return
 home. What pre-testing looks like for Canadians coming into Hawai'i and an overview of
 branding Hawai'i now. What messaging are being used to communicate to the Travel
 Agents and what the present booking pace look like
- 9. Hō 'ike A Hawai 'i Tourism Japan No Ke Kūlana Huaka 'i Presentation by Hawai 'i Tourism Japan's Eric Takahata, Managing Director, on what booking pace looks like from our wholesale partners
 - a. When will the 14-day quarantine be lifted for US travelers into Japan
 - b. What does the airline schedule into Hawai'i look like
- 10. Hō 'ike A Hawai 'i Visitors & Convention Bureau No Ke Kūlana Huaka 'i
 Presentation by Hawai 'i Visitors & Convention Bureau's John Monahan, President and
 CEO and Jay Talwar, Senior Vice President and Chief Marketing Officer regarding the
 domestic travelers concerns and questions, along with an update on their activities
 - a. Concerns on 72 hours turnaround time on pre-COVID testing
 - b. Partners and customers want to know what to expect before they arrive
 - c. What are our hotel safety standards, what is in place?
 - d. Are the beaches open, what are the rules?
 - e. Are restaurant open
 - f. Are hotels pool open and do we have to wear a mask
 - g. What attractions are open, what can I do and see
 - h. Promotion Overview
 - i. Partners
 - j. Messaging Update
 - k. Media Update
 - 1. Earned media update



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11. Hō'ike No Ka Papahana Ka'a'ike Ho'oulu Pā'oihana Li'ili'i
Presentation by Kelly Sanders, Senior Vice President of Operations, Highgate Hawai'i, approval for funding a communication plan for guests to frequent and support small businesses.

12. *Hoʻokuʻu* Adjournment

*** 'Aha Hoʻokō: Ua hiki i ka Papa Alakaʻi ke mālama i kekahi hālāwai kūhelu i kū i ka Hawaiʻi Revised Statutes (HRS) § 92-4. E mālama 'ia kēia hālāwai kūhelu nei ma lalo o ka § 92-5 (a)(4), § 92-5 (a)(8) and §201B-4(a)(2) no ka pono o ko ka Papa Alakaʻi kūkā a hoʻoholo 'ana i nā nīnūnē a nīnau i pili i ko ka Papa Alakaʻi kuleana me ko ka Papa Alakaʻi loio. He hālāwai kūhelu kēia i 'ole paulele 'ia ka 'ikepili a i mea ho'i e mālama kūpono ai ko Hawai'i 'ano, he wahi i kipa mau 'ia e nā malihini.

*** Executive Session: The Board may conduct an executive session closed to the public pursuant to Hawai'i Revised Statutes (HRS) § 92-4. The executive session will be conducted pursuant to § 92-5 (a)(4), § 92-5 (a)(8) and §201B-4(a)(2) for the purpose of consulting with the board's attorney on questions and issues pertaining to the board's powers, duties, privileges, immunities, and liabilities; and to discuss information that must be kept confidential to protect Hawai'i's competitive advantage as a visitor destination.

Kono 'ia ka lehulehu e nānā mai i ka hālāwai a ho 'ouna mai i ka 'ōlelo hō 'ike kākau 'ia no kēlā me kēia kumuhana i helu 'ia ma ka papa kumumana 'o. Hiki ke ho 'ouna mai i nā 'ōlelo hō 'ike kākau 'ia ma mua o ka hālāwai iā ariana.kwan@gohta.net. Inā pono ke kōkua ma muli o kekahi kīnānā, e ho 'omaopopo aku iā Ariana Kwan (973-2254 a i 'ole ariana.kwan@gohta.net), he 'ekolu lā ma mua o ka hālāwai ka lohi loa.

Members of the public are invited to view the public meeting and provide written testimony on any agenda item. Written testimony may be submitted prior to the meeting to the HTA by email to ariana.kwan@gohta.net; Any person requiring an auxiliary aid/service or other accommodation due to a disability, please contact Ariana Kwan (973-2254 or ariana.kwan@gohta.net) no later than 3 days prior to the meeting so arrangements can be made.

Agenda Item #2:

Approval of Minutes of the September 23rd, 2020 HTA Marketing Standing Committee Meeting



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MARKETING STANDING COMMITTEE MEETING HAWAI'I TOURISM AUTHORITY Wednesday, September 23, 2020 Virtual Meeting

MINUTES OF MARKETING STANDING COMMITTEE MEETING

COMMITTEE MEMBERS PRESENT: Kelly Sanders (Chair), Fred Atkins, George Kyoko Kimura, Sherry Menor-Kam. McNamara, and Benjamin Rafter HTA STAFF PRESENT: John De Fries, Keith Regan, Pattie Herman, Marc Togashi, Marisa Yamane, Kalani Ka'anā'anā, Caroline Anderson, and Jennifer Chun **GUESTS:** Representative Richard Onishi, Senator Glenn Wakai, John Monahan, Jay Talwar, Eric Takahata, Josh Gershenson, and Tanya Freund

LEGAL COUNSEL: Gregg Kinkley

1. Call to Order and Pule:

Keith Regan, HTA Chief Administrative Officer, called the meeting to order at 10:30 a.m. Mr. Regan provided instructions to the general public with regard to submitting testimony. He confirmed the attendance of the Committee members by roll call. Mr. Regan turned the floor over to Chair Kelly Sanders. Kalani Kaʻanāʻanā, HTA Director of Hawaiian Cultural Affairs and Natural Resources, opened the meeting with a pule.

2. Approval of Minutes of the August 26, 2020 HTA Marketing Standing Committee Meeting:

Chair Sanders requested a motion to approve the minutes of the August 26, 2020 HTA Marketing Standing Committee meeting. George Kam made a motion, which was seconded by Fred Atkins. The motion was unanimously approved.

3. Presentation from HVCB Jay Talwar/Sr. VP & CMO on Updates to Marketing Plans for Welcoming Back Visitors:



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Chair Sanders recognized Jay Talwar of HVCB to present an update on market insights and HVCB's marketing plan. Mr. Talwar reported that traveler sentiment remains low, and few are willing to travel before April 2021. He noted however that there are positive indicators as to the level of traveler comfort with a pre-test program. He added that resident sentiment has shifted with the state of the economy and the high levels of unemployment.

Mr. Talwar reported that the purpose of the messaging strategy is to attract visitors who will leave Hawai'i better than when they arrived. He noted that the strategy will maintain brand integrity and avoid pricing down the destination. Mr. Talwar discussed the Reopening Communications Plan flow chart. He highlighted that HVCB needs to develop the strategy to communicate this messaging to residents. He said HVCB will continue its outreach to regional and national media platforms, focus on Over-the-Top media and social media, and make virtual media blitzes. Mr. Talwar said HVCB's hotel and airline partners will be sharing the Kuleana messaging about how to respect Hawai'i's cultures and communities in-room and in-flight. He said the reopening date has received a significant amount of news coverage. Mr. Talwar noted that the messaging will encourage visitors to experience Hawai'i on a deeper level while following safe practices. He added that HVCB's messaging will refrain from using the word "reopening." He played the Kuleana sample video that will be shared in-room and in-flight. He then played the It's Time sample video that will be advertised in the major markets.

Mr. Talwar discussed the Mālama Hawai'i Program. He shared that the purpose of the program is to invite visitors to stay open, connected, mindful, safe, and to perpetuate the beauty of the destination. He noted that HTA and HVCB have worked with an alliance of private industry partners, including major hotels and airlines, and volunteer organizations, to offer an extra night's stay at no additional charge if visitors engage in a voluntourism activity. He added that the vision is for repeat travelers to work shoulder-to-shoulder with residents. Mr. Talwar said HVCB has developed social media messaging and is working with their ambassadors to prepare content. He noted that their industry partners, including national airline carriers and hotel brands, are excited about the opportunity because it will be unique in the marketplace. He explained that HVCB's industry partners will bring in influencers and develop amazing itineraries for them. He noted that their efforts will be supplemented by HVCB's digital media outreach and paid media in Los Angeles, San Francisco, Seattle, and Portland.

Sherry Menor-McNamara noted that small businesses are hurting and waiting for the visitor industry to resume. She asked if there are efforts or media campaigns to encourage visitors



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to support local businesses, local restaurants, and the local economy. Mr. Talwar responded that HVCB does not have a separate strategy plan focusing on that. He noted however that the type of visitor the media campaign attracts will be invested in purchasing goods and services from local establishments. Kyoko Kimura said Maui County has several programs to support local businesses.

Ms. Kimura asked what word HVCB will use if it will not use "reopening." Mr. Talwar responded that they are currently using: "Welcoming visitors back without a 14-day quarantine with a negative pre-test." He noted that is a long phrase, and HVCB's creative team is working on new verbiage. Ms. Kimura asked if HVCB is still providing screening services at the airports. Mr. Talwar responded in the negative and added that screening at the airports has transitioned to a digital platform managed by the State.

John De Fries, HTA President & CEO, asked how the media campaign will address the issue of some places like CVS not pre-testing children under a certain age. Mr. Talwar responded that the State's policy has been evolving over the past few days with alternate testing being developed that may be more appropriate for children. John Monahan of HVCB replied that there has been movement on the minimum age with regard to certain pre-tests.

Mr. Atkins noted that resident sentiment is better than a month or two ago. He asked if the survey included non-tourism industry workers. Mr. Talwar responded that the survey sample is representative of the resident population and is not specific to the visitor industry. Mr. Atkins asked what percentage of HVCB's remaining budget has been committed to the reopening. Mr. Talwar responded that HVCB has put together this media plan with the funds they have. He noted that the plan thus far has been all earned media, which is not dollar intensive. He said that when Hawai'i reopens, HVCB will put more money into the market. He added that HVCB does not want to fight the election cycle with their budget. He said HVCB will wait until after the election and see what the market is like. Mr. Monahan added that HVCB is seeking additional avenues of funding. Mr. Atkins asked if the national airline carriers have given any indication when flights will resume to the neighbor islands. Mr. Talwar responded that the airlines have been asking how many rooms will be available. He added that the airlines are saying that demand is picking up post-announcement, but it is sliding into next year.

Pattie Herman, HTA Vice President of Marketing & Product Development, said Costco is taking reservations for Hawai'i effective November 13th, with the highest number of bookings for Maui and the second highest for O'ahu and Hawai'i Island.



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Ms. Menor-McNamara asked if there is a communication plan for the specific orders and safety procedures for each county. Mr. Monahan responded that HTA has an extensive list of communications, and HVCB will send it out to its members. He noted that HVCB does not communicate that to the general public. Mr. Talwar replied there is a link on the HVCB website. Mr. Monahan said the HVCB website has a chart with relevant information for each county and in-bound flights will have a list of significant facts. Chair Sanders added that from a hotel perspective, the individual properties can also send this information to guests.

Chair Sanders invited the public to provide testimony, and there was none.

4. Presentation from HTJ by Eric Takahata/Managing Director on Overall Recovery Updates and Welcoming Back Visitors:

Chair Sanders recognized Eric Takahata of Hawai'i Tourism Japan (HTJ) to present an update on market insights and HTJ's marketing plan. Mr. Takahata reported that a new traveler sentiment survey will be completed by the end of the month. He noted that the new Japanese Prime Minister Yoshihide Suga will succeed Prime Minister Shinzo Abe. He added that Japan is handling the pandemic well and has the COVID-19 situation mostly under control.

Mr. Takahata reported that the recovery plan is on schedule. He said Phase One was mostly communication. He said Phase Two is engagement, which has also included working with the Japanese media because the Japanese media is tuned in to what is happening in Hawai'i. He noted that the recovery campaign will kick into high gear during Phase Three, but that is dependent on the reopening officially taking place. He added that the State needs to make an official proclamation that it will accept the COVID-19 pre-tests approved by the Japanese government.

Mr. Takahata reported that HTJ continues to translate and provide up-to-date COVID-19 information updates to its partners in Japan. He noted that HTJ continues to engage with the Japanese market, and the Hawai'i at Home platform has been extremely successful. The platform offers coloring books, cooking lessons, and Hawaiian music, and provides the Japanese market with the opportunity to stream Hawai'i content all day. Mr. Takahata said they remain engaged with the travel trade through education programs, and the Aloha Program Webinar continues to thrive. He added that HTJ is engaged with its local partners like the Bishop Museum, 'Iolani Palace, Polynesian Voyaging Society, and Mālama Pono. He noted that HTJ is in the process of creating a COVID-19 microsite for Japanese travelers with



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all the necessary information. He added that other destinations have had live websites for a month or two. Mr. Takahata said HTJ's site will hopefully be live by mid-October and will include messages from Governor David Ige and Mr. De Fries. He noted that Japanese people gravitate to messages from heads-of-state. Mr. Takahata said they are almost at the final cut for the safety protocol video, and it will be completed within the next week or so. He noted that the safety protocol video will be edited and cut for different media platforms. He added that HTJ is working with ANA, JAL, and Hawaiian Airlines to have the video shared inflight. He then shared the full-cut of the safety protocol video. Mr. Takahata reported that HTJ will host the Online Japan Summit and Hawai'i Seminar for the travel trade in early 2021, which will have over 1,000 attendees. He added that HTJ will host the Virtual Hawai'i Expo, which is a consumer event with an anticipated 50,000 attendees. He said the expo will be the first of its kind and free to participate.

Chair Sanders asked how the safety video is being shared with the general public in Japan. Mr. Takahata responded that it will be shared through digital platforms, social media, and HTJ's airline partners. He noted that the video will be played in-flight on JAL, ANA, and Hawaiian Airlines flights and may have a dedicated in-flight channel. He added that the video will be made available to 175 satellite offices across Japan to share with their potential customers.

Ms. Menor-McNamara thanked Mr. Takahata for including small businesses and local companies in the safety protocol video. Mr. Takahata responded that they wanted to include as many local partners as they could.

Ms. Kimura asked for clarification on whether the State will accept Japan-approved COVID-19 pre-tests. Mr. Takahata responded that Japan has approved thirteen different Nucleic Acid (NAT) tests. He anticipated that the Japanese NAT tests will be accepted for the Hawai'i pre-test program and has requested an official proclamation from the Department of Health (DOH). He noted that NAT tests are becoming more readily available in Japan. Mr. Takahata added that JTB and HIS are contracting with Japanese labs to perform testing before the customer comes to Hawai'i.

Mr. De Fries shared that the PGA has done an excellent job with its safety protocols, and Gov. Ige has made the DOH available to support the PGA. As a result, all three golf tournaments in 2021 are preparing to continue as planned with no fans.

Representative Richard Onishi asked about the status of Hawai'i residents traveling to Japan. Mr. Takahata responded that the Japanese government does not believe the United



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States has the COVID-19 situation under control. He said Japan is not permitting U.S. residents to enter Japan. He explained that there were discussions this summer about establishing a travel corridor between Hawai'i and Japan. He said the Japanese government understands that Hawai'i is in a better condition than the U.S. Mainland. Mr. Takahata noted that it was a complicated issue carving out a special exemption for Hawai'i and talks have stalled.

Chair Sanders invited the public to provide testimony, and there was none.

5. Presentation from Travelzoo Josh Gershenson/Head of Business Development and Tanya Freund/Senior Sales Manager on How They Target High-end Travelers:

Chair Sanders recognized Josh Gershenson and Tanya Freund of Travelzoo to present on how Travelzoo targets high-end travelers. Mr. Gershenson provided a background of Travelzoo. He said Travelzoo is mostly comprised of affluent members with 54% having over \$100,000 in household income. He noted that these affluent travelers are the most resilient and will be the first to resume long-haul travel. He added that Hawai'i has remained a popular destination amongst Travelzoo's affluent membership because of its pristine reputation.

Ms. Freund said most of its members are likely to stay at chain and major hotels in the near term because the safety standards are more defined than in AirBnb's or other short term rentals. She added that their members know what to expect from the brands they love. Ms. Freund said their campaigns are meant to create the intent to travel. She explained that they have discovered that campaigns inspiring luxury travel have been more successful than those for discounted travel because their members feel like they are receiving a special experience. Ms. Freund said Travelzoo members are not put off by high price points and more often upsell themselves. She noted that their members have not been heavily affected by the COVID-19 economic situation and rather have more discretionary income to spend on high-end experiences. Ms. Freund said a Travelzoo campaign would emphasize quality over price and echoed Mr. Talwar's desire to not price down the destination.

Mr. Kam invited the public to provide testimony, and there was none.

6. Update from Kalani Ka'anā'anā on Surfing & Canoe Paddling Advisory Group Regarding the Discussion of Adding One Board Member on the Advisory Committee:

Mr. Kam recognized Mr. Ka'anā'anā to provide an update with regard to the Surfing and Canoe Paddling Advisory Group. Mr. Ka'anā'anā said the committee needs to leverage new



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technologies, platforms, and organizations to promote surfing and canoe paddling. He noted that the Kahua (foundation) of the committee's work will be environment, culture, community, education, safety, and infrastructure. He added that the committee is in alignment with the 5-Year Strategic plan and HTA's Four Pillars. Mr. Ka'anā'anā explained that the committee's work will promote human and environmental health, celebrate Hawai'i's connection to the sport and the ocean, develop the ability to be an environmentally-aligned economic driver, create development opportunities for established and related industries, emphasize social and economic benefits, make recommendations of support for related initiatives, projects, programs and contracts, and raise public awareness for historical and cultural significance.

Mr. Ka'anā'anā recognized the budgetary limitations and said the committee will leverage partnerships that do not cost money like with Mālama Pono. He added that the committee would work with the USA Surf Team, work to showcase the history of the sports in a museum setting, and support volunteer groups that clean beaches. He noted that activities and sports are statistically the number one reason why avid traveler visit Hawai'i, and Hawai'i visitors are more than twice as likely to engage in water sports.

Mr. Atkins asked about the make-up of the committee given its cross-sectional work. Mr. Ka'anā'anā responded that he has been talking to a number of community leaders, and the committee will have either nine or thirteen seats. He noted that the effort to make it statewide is taking longer than anticipated.

Mr. De Fries encouraged generational representation on the committee because there are youth leaders in the sports.

Mr. Takahata said this is something needed for the Japan market because there is a large community of surfers in Japan and because the Olympics will be hosted in Japan.

Rep. Onishi asked if there are estimated budgets for either nine or thirteen members. Mr. Ka'anā'anā responded in the negative and explained the committee would be comprised of volunteers with no compensation.

Mr. Kam invited the public to provide testimony, and there was none.

7. Adjournment:

The meeting adjourned at 12:14 p.m.

Respectfully submitted,



Reyn S.P. Ono

Hawai'i Convention Center 1801 Kalākaua Avenue, Honolulu, Hawai'i 96815

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Officer

Reyn S.P. Ono Recorder

Agenda Item #4:

Presentation on Travel agents booking pace November, December 2020 and 2021 and Countries with the US being on the "do not travel list" & "14-day quarantine"

MARKETING STANDING COMMITTEE MEETING

October 28, 2020

Jennifer Chun

Director of Tourism Research



HTA COVID-19 UPDATE

(Issued: 10/27/20 @ 4:00pm)

Reason for Trip by Arrival Airport - Transpacific Screened Passengers as of 10/26/20	Honolulu (HNL)	Kahului (OGG)	Kona (KOA)	Lihue (LIH)	Grand Total
Airline Crew	267	66	40	32	405
Corporate Meeting	2	0	1	0	3
Essential Worker	139	139 28 12		9	188
Honeymoon	17	9	0	9	35
Incentive Trip	3	₫	0	0	4
Intended Resident	79	32	22	12	145
Military or Federal Government	125	-1	0	2	128
Other	73	17	12	5	107
Other Business	118	40	30	11	199
Pleasure/Vacation	532	467	130	193	1,322
Returning Resident	860	168	133	50	1,211
To Attend School	11	0	0	0	11
To Get Married	0	0	1	2	3
Transit	325	1	0	0	326
Visiting Friends or Relatives	465	114	50	32	661
Grand Total	3,016	944	431	357	4,748

Source: Safe Travels program developed by the State of Hawaii Office of Enterprise Technology Services

Note: The data is preliminary and subject to change

Market Impact Update: https://www.dropbox.com/10/27/20 HTA COVID19 Update

Novel Coronavirus in Hawaii

COVID-19 Positive Cases

Cumulative totals as of 12:00 noon on October 27, 2020

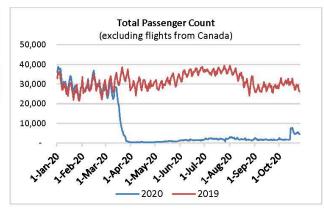
Total Cases	14,773 (66 new)				
Hawaii	1,233				
Kauai	62				
Lanai	87				
Maui	403†				
Molokai	17				
Oahu	12,913				
Pending	0				
Residents diagnosed outside of Hawaii	58				
Required Hospitalization	1,073‡				
Hawaii Deaths	215				
Released from Isolation	11,523§				

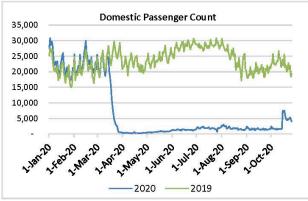
Footnotes for COVID-19 Cases

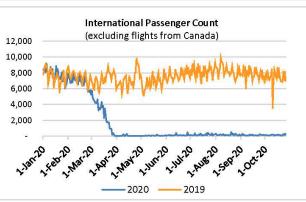
*As a result of updated information, one case from Oahu was removed from the counts.

†One case is a Lanai resident whose exposure is on Maui Island and who will be remaining on Maui Island for the interim.

‡Includes Hawaii residents hospitalized out of state. §Includes cases that meet isolation release criteria (Isolation should be maintained until at least 24 hours after resolution of fever and myalgia without the use of antipyretics OR at least 10 days have passed since symptom onset, whichever is longer). (The cases that have died and one case that has left the jurisdiction have been removed from these counts). Positive cases include confirmed cases, and Hawaii residents and non-residents; data are preliminary and subject to change. Note that CDC provides case counts according to states of residence.







Daily Passenger Count Table

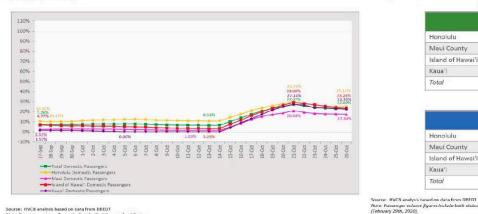
10/26/2020	Domestic	International	Total
Oahu	2856	332	3188
Maui	469		469
Island of Hawaii	370		370
Kauai	350		350
State	4045	332	4377



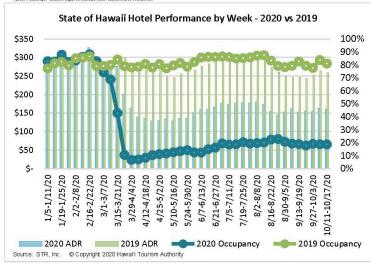
7-Day Domestic by Island Moving Average Daily Passenger Volume

2020 Volume as Percentage of 2019 Volume

Through October 26, 2020



Source: HVCB analysis based on data from DBEDT Note: Passenger volume flaures include both visitors and resident



Hawaii Hotel Performance Info:

For the week of October 11 – October 17, 2020

	Occupancy	ADR	RevPAR
State of Hawaii	18.7%	\$ 160.95	\$ 30.09
Oahu	20.0%	\$ 157.00	\$ 31.43
Maui County	14.5%	\$ 188.22	\$ 27.33
Kauai County	17.3%	\$ 162.53	\$ 28.17
Island of Hawaii	22.8%	\$ 138.15	\$ 31.44

Domestic by Island Month-to-Date and Year-to-Date Daily Passenger Volume 2020 Volume versus 2019 Volume

Through October 26, 2020

60.066

14,906

8,256

5,974

89,202

1.224,344

472,586

237,819

158,038

2,092,787

Honolulu

Kaua'

Total

Honolulu

Кана"

Total

Maui County

Island of Hawai'i

Maui County

Island of Hawai'i

October 2020 (Month-to-Date through October 26)

319.309

157,909

59,803

53,783

590,804

3.798.559

1,851,979

812,937

633,244

7,096,719

2020 (Year-to-Date through October 26)

Change

-259.243

-143,003

-51,547

-47,809

-501,602

Volume

Change

-2,574,215

-1,379,393

-575,118

-475,206

-5,003,932

Change

-81.2%

-90.6%

-86.2%

-88.9%

-84.9%

Percent

Change

-67.8%

-74.5%

-70.7%

-75.0%

-70.5%

News Highlights

October 27, 2020

Honolulu Star Advertiser: Confusion about rules on mask wearing is widespread across counties for residents and tourists

KHON2: Halloween gatherings in Waikiki are discouraged

Honolulu Civil Beat: COVID-19 Restrictions Vary Wildly Depending On Where You Live

Honolulu Civil Beat: Anatomy Of An Outbreak: Once Unleashed, The Coronavirus Moved Swiftly On Lanai

Honolulu Public Radio: The Latest: Lanai Test Results Should Show Extent Of Spread As Stay-At-Home Order Takes Effect

West Hawaii Today: Japanese travel plan nearly set

Big Island Now: Hawaii Health Systems Supported by Out-of-State Workers Through Christmas

Travel Pulse: CDC Updates Recommendation to Defer All Cruise Travel

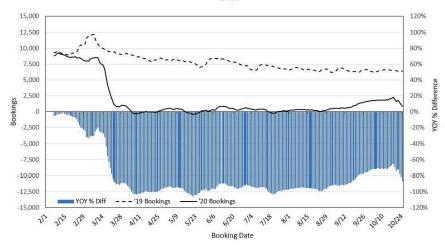
SF Gate: United drops its shortest route, Hawaii opens and adds new flights, holiday travel bargains ahead

35,000															
30,000															
25,000	1							-1							_
20,000	_							-1	1						_
15,000	_							-	1						
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5,000										-		109		Pa	_
0				-					-						
	-19	-19	-19	-19	-19	-20	-20	17-Mar-20	-20	17-May-20	-20	-20	-20	-20	-20
	17-Aug-19	17-Sep-19	17-0ct-19	17-Nov-19	17-Dec-19	17-Jan-20	17-Feb-20	Mar	17-Apr-20	May	17-Jun-20	17-Jul-20	17-Aug-20	17-Sep-20	17-04-20
	17-	17.	17.	17-	17-	17	17.	17-	17-	17-1	17.	17	17-	17.	17

Weekly Unemployment Initial Claims: October 17, 2020

State of Hawaii	5,119
C&C of Oahu	3,247
Hawaii County	705
Maui County	750
Kauai County	295
Agent (filed in Hawaii against another state)	122

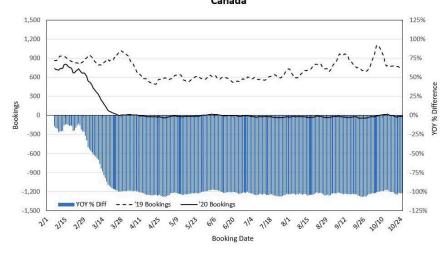
Travel Agency Bookings to Hawaii for Future Arrivals* Based on a 7-day Moving Average, 2020 vs 2019 U.S.



"Future Arrivals refers to all arrivals that are 'future' relative to the referenced booking date. Source: Global Agency Pro

Update: Oct 25, 2020

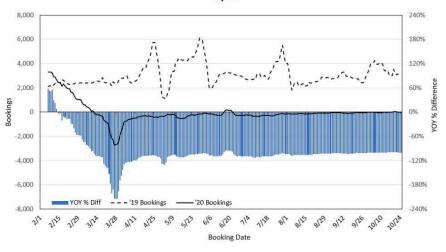
Travel Agency Bookings to Hawaii for Future Arrivals* Based on a 7-day Moving Average, 2020 vs 2019 Canada



*Future Arrivals refers to all arrivals that are 'future' relative to the referenced booking date. Source: Global Agency Pro

Update: Oct 25, 2020

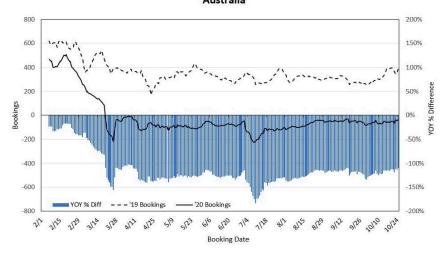
Travel Agency Bookings to Hawaii for Future Arrivals* Based on a 7-day Moving Average, 2020 vs 2019 Japan



*Future Arrivals refers to all arrivals that are 'future' relative to the referenced booking date.

Update: Oct 25, 2020

Travel Agency Bookings to Hawaii for Future Arrivals* Based on a 7-day Moving Average, 2020 vs 2019 Australia

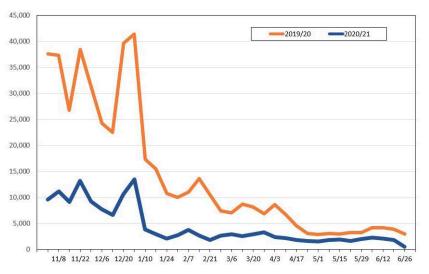


*Future Arrivals refers to all arrivals that are 'future' relative to the referenced booking date. Source: Global Agency Pro

Update: Oct 25, 2020

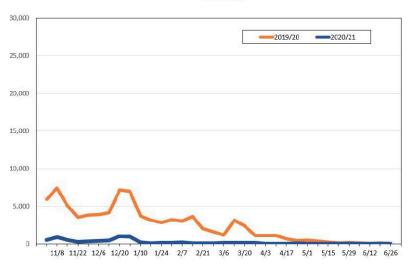


Travel Agency Weekly Bookings for Future Travel to Hawai'i as of October 25, 2020 U.S.



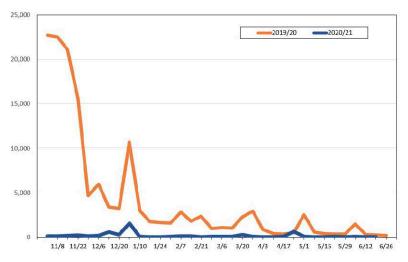
Source: Global Agency Pro, as of October 25, 2020

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of October 25, 2020 Canada



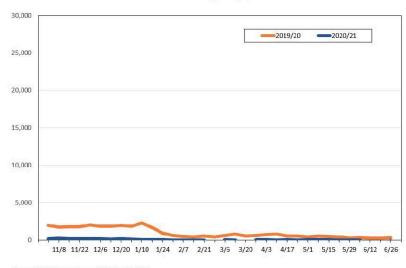
Source: Global Agency Pro, as of October 25, 2020

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of October 25, 2020 Japan



Source: Global Agency Pro, as of October 25, 2020

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of October 25, 2020 Australia



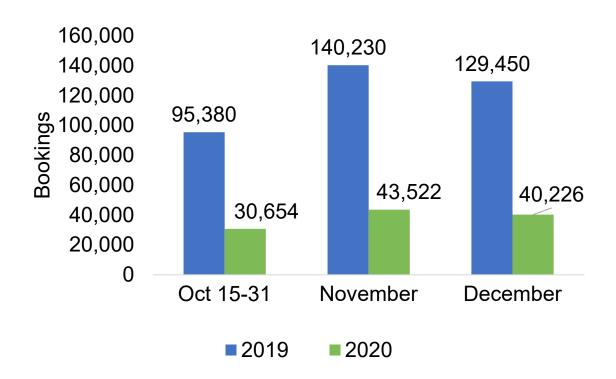
Source: Global Agency Pro, as of October 25, 2020

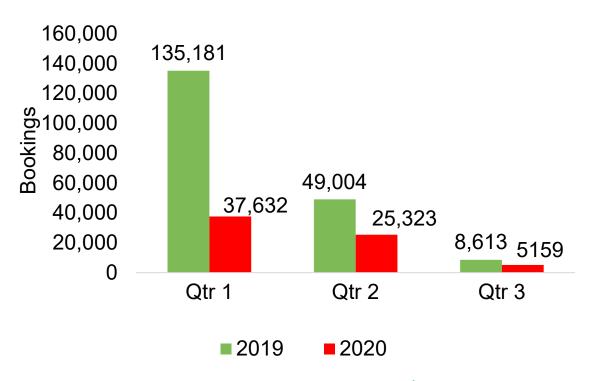


US

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 by Month

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 by Quarter

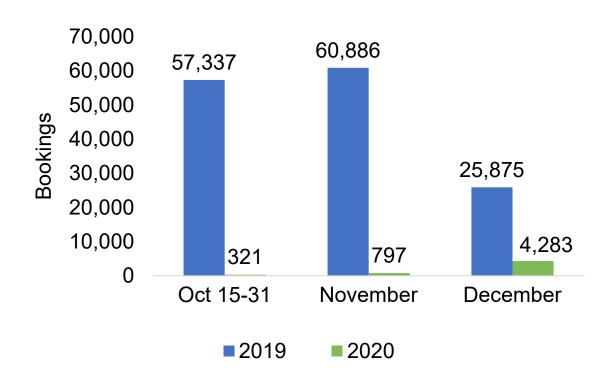




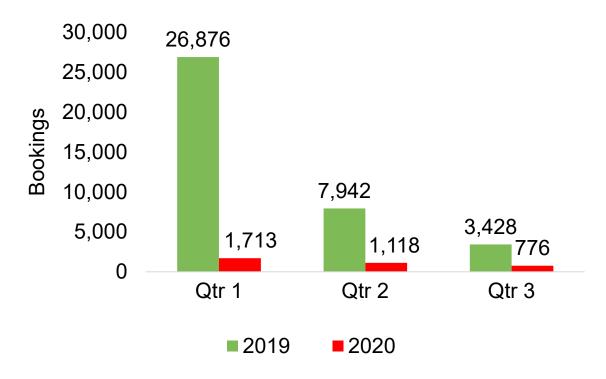


JAPAN

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 by Month



Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 by Quarter

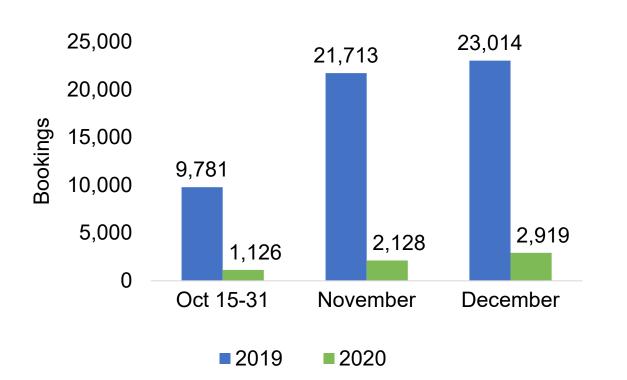


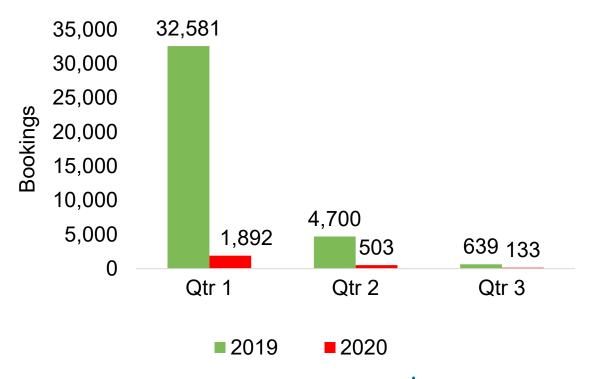


CANADA

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 by Month

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 by Quarter

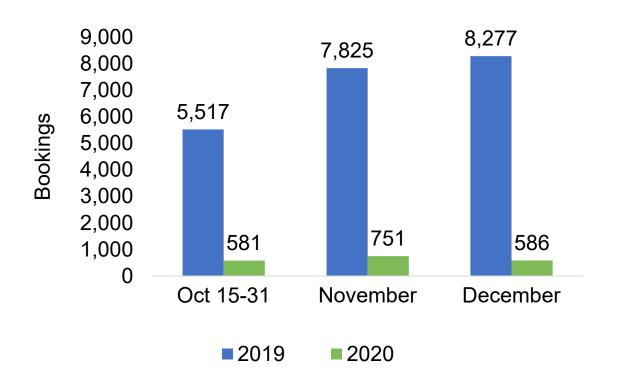


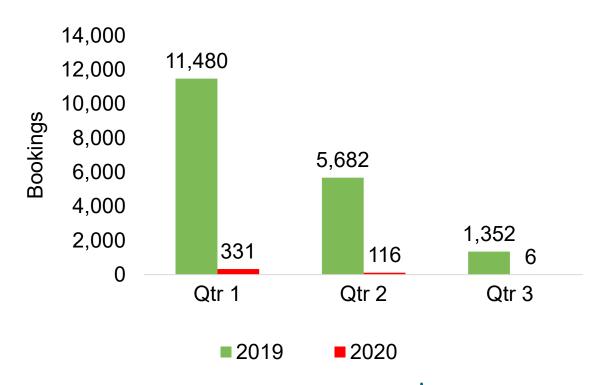




AUSTRALIA

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 by Quarter

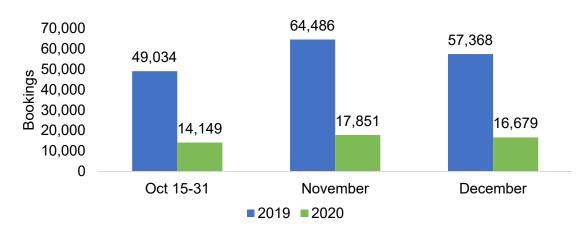




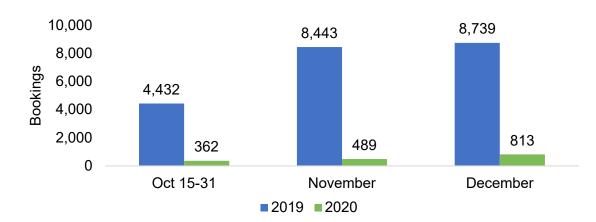


O'ahu by Month 2020

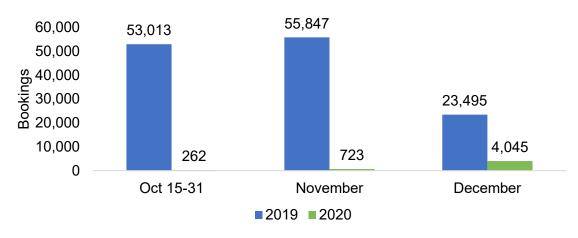
Travel Agency Booking Pace for Future Arrivals, 2021 vs 20 - U.S.

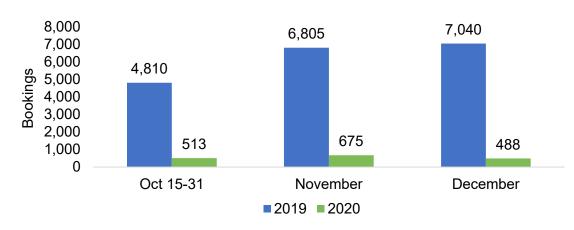


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada



Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan





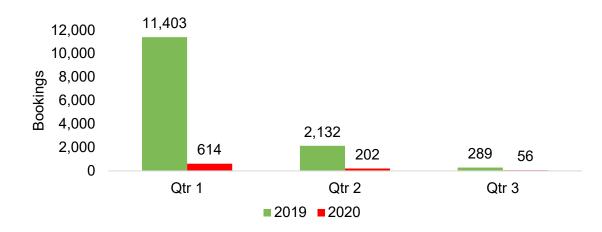


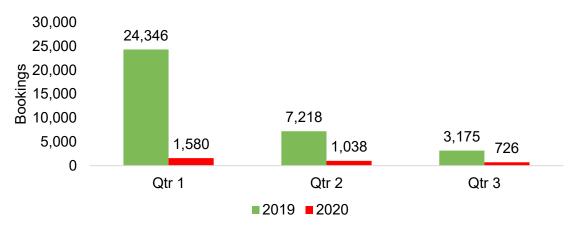
O'ahu by Quarter 2021

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.

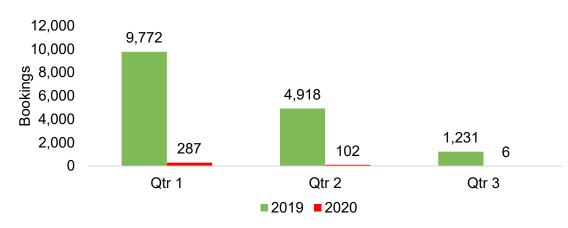


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada





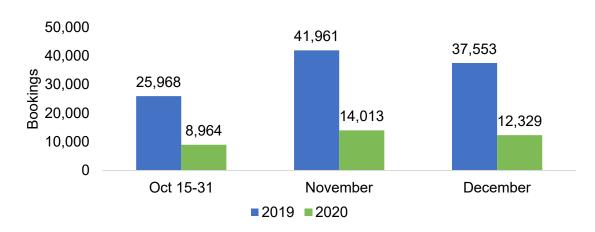
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia



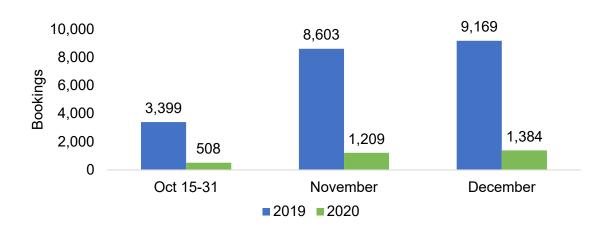


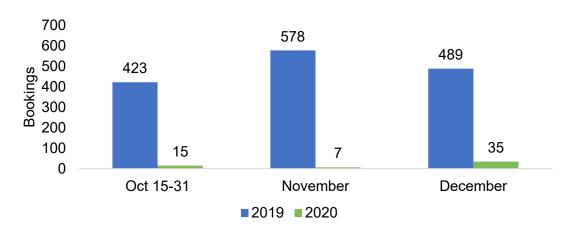
Maui by Month 2020

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.

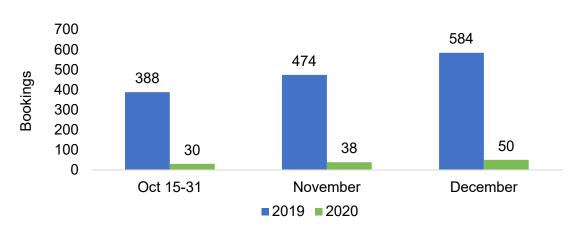


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada





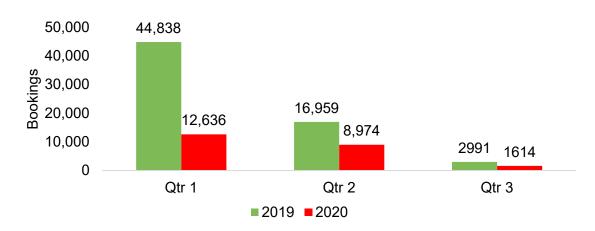
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia



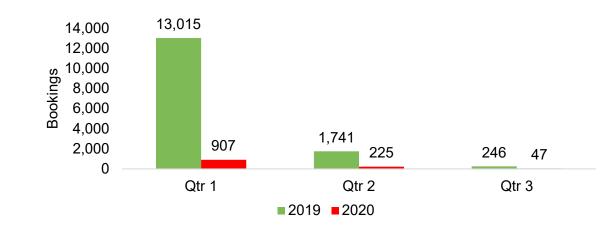


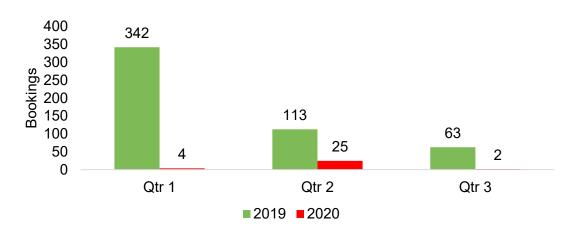
Maui by Quarter 2021

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.

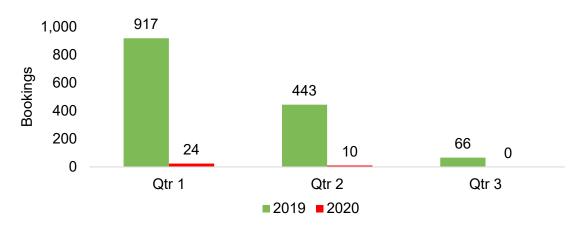


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada





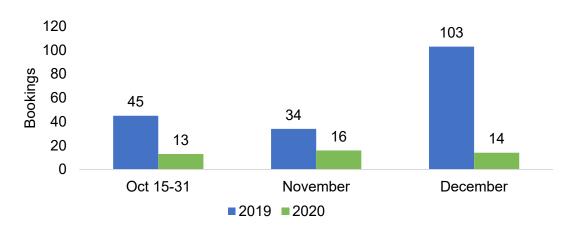
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia



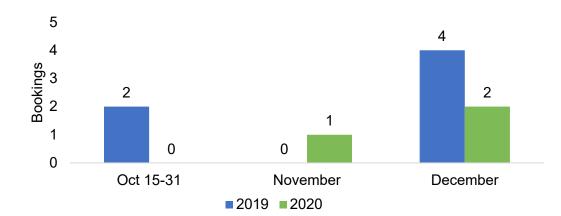


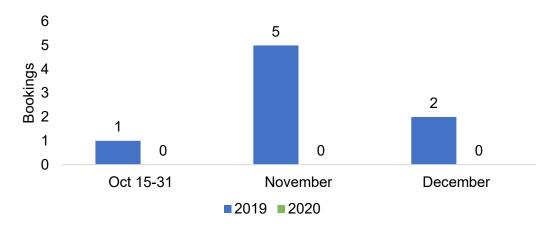
Moloka'i by Month 2020

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.

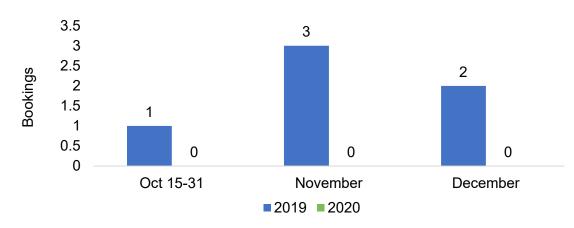


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada





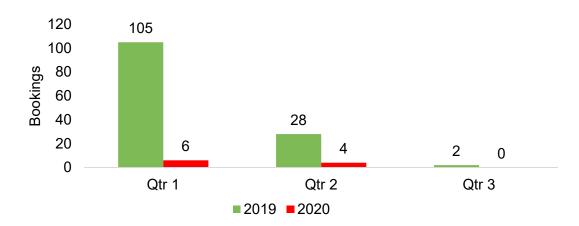
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia





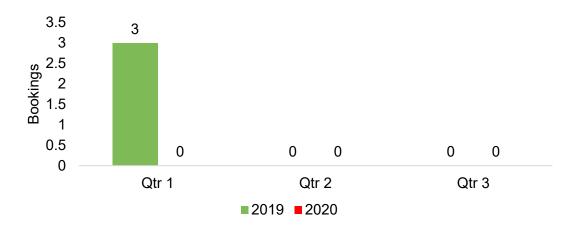
Moloka'i by Quarter 2021

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.

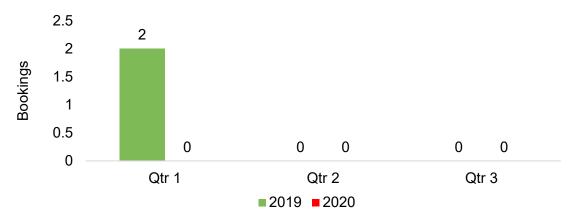


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada





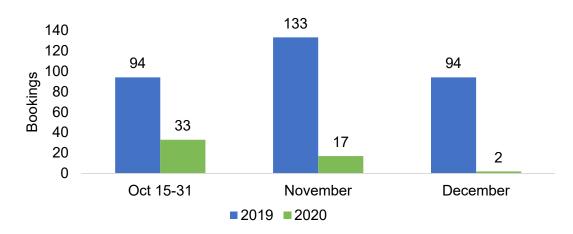
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia



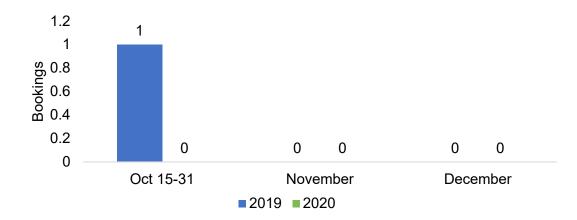


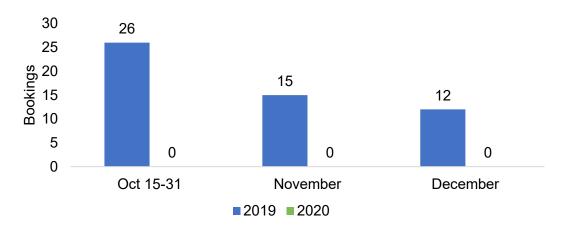
Lāna'i by Month 2020

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.

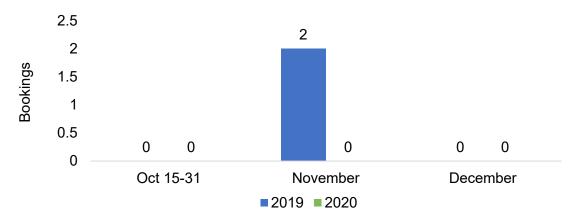


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada





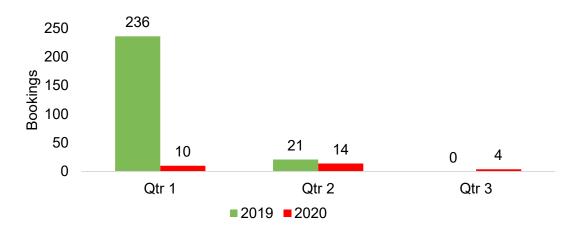
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia





Lāna'i by Quarter 2021

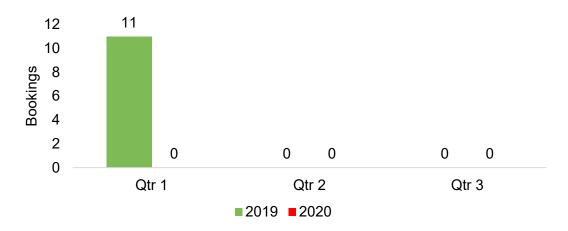
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.

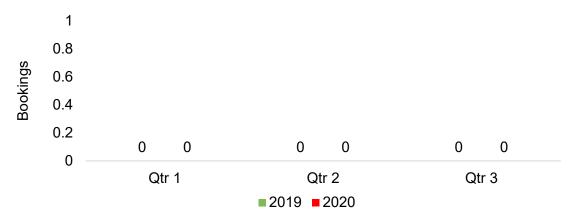


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada



Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan

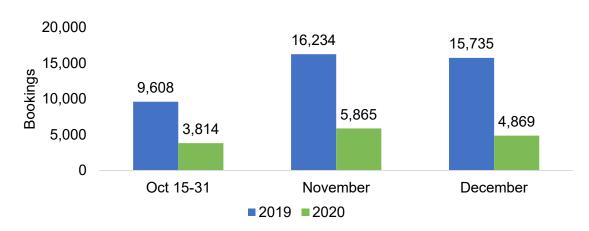




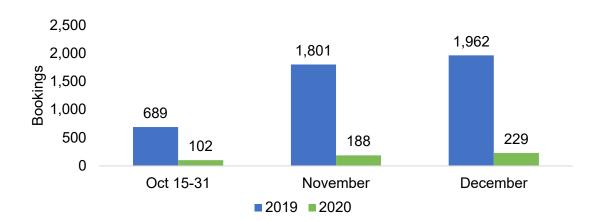


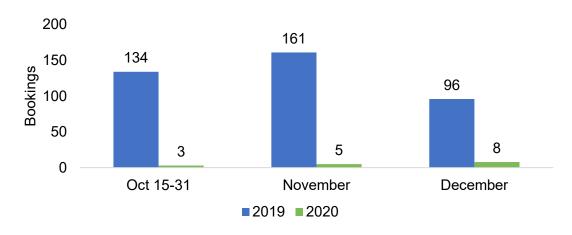
Kaua'i by Month 2020

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.

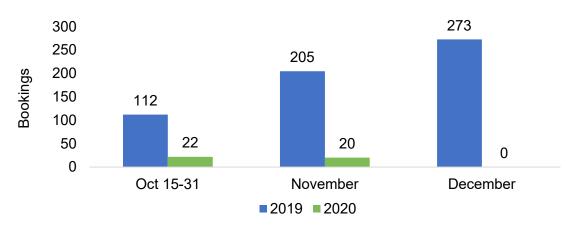


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada





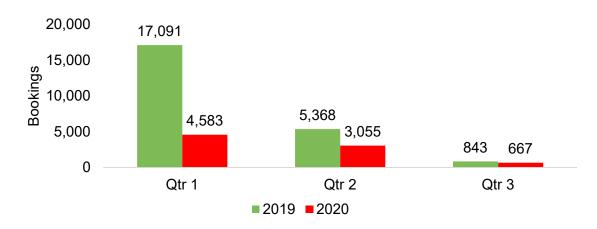
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia



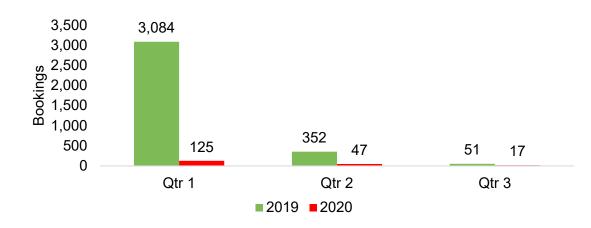


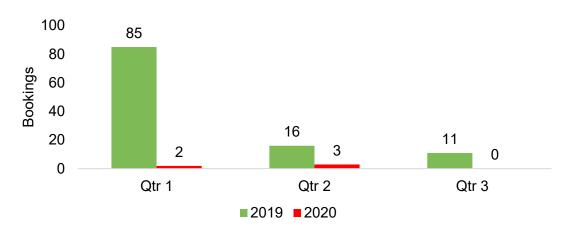
Kaua'i by Quarter 2021

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.

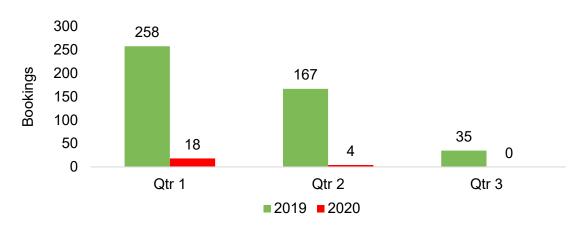


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada





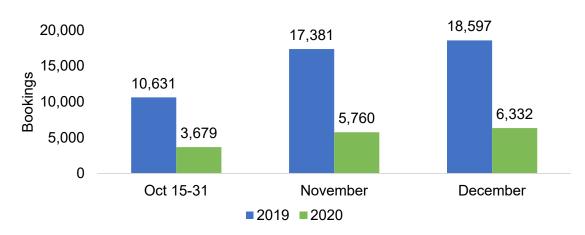
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia



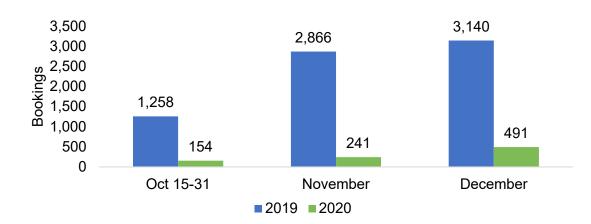


Hawai'i Island by Month 2020

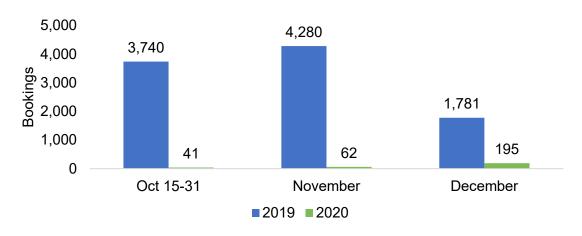
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.

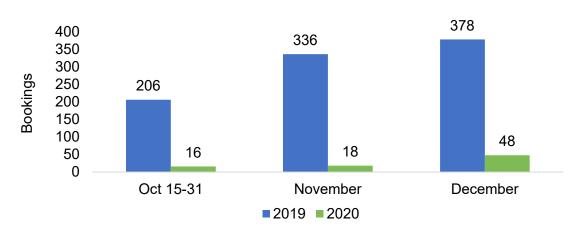


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada



Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan

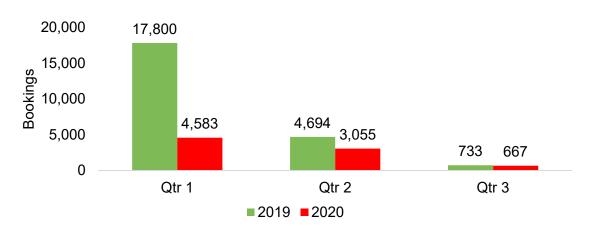




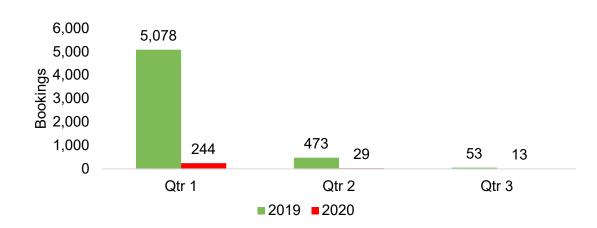


Hawai'i Island by Quarter 2021

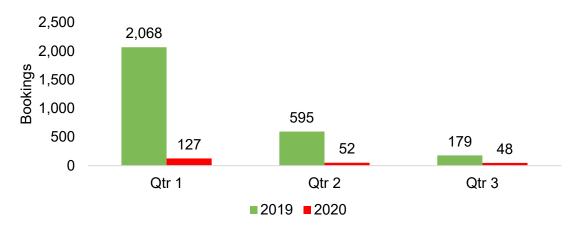
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.

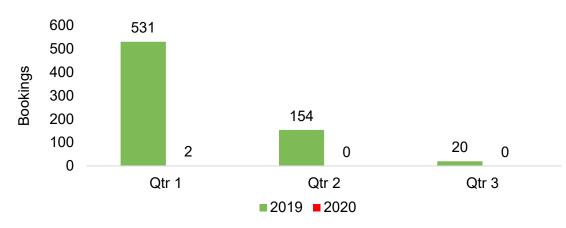


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada



Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan







MMA Travel Status

	Able to Visit U.S.?	Quarantine Upon Return?				
Japan	Yes	14-day quarantine in designated quarantine location				
Canada	No. Border crossings restricted to essential workers and citizens returning home	14-day quarantine Test upon arrival starting November 2				
Australia	No. Ban on all overseas travel for Australians, unless an exemption is granted	14-day quarantine				
New Zealand	Yes, but New Zealanders advised not to travel overseas	14-day quarantine and negative COVID-19 test				
China	No	14-day quarantine and negative COVID-19 test within 72 hours of departure				
Korea	Yes	14-day quarantine and COVID-19 test upon arrival				
Taiwan	Yes	14-day quarantine				
Germany	Yes	Negative COVID-19 test within 48 hours of departure				
UK	Yes	14-day quarantine Reduced to 7 days on December 1				



Agenda Item #5:

Presentation on regarding airlines booking pace for November, December 2020 and into 2021.





The listed airlines understand the pre-travel testing requirements and are reliable sources of testing and for information as to testing options as trusted testing and travel partners.















Alaska Airlines



Mask Policy: Alaska Airlines is requiring all crew members and passengers age 2 and older to wear masks – with no exceptions. Face coverings will be provided upon request.

Blocked Seats: Alaska is capping all flights at 65% capacity through January 6, 2021. Middle seats will be blocked accordingly to allow distancing onboard. Families who wish to be seated together despite blocked seats can speak with gate agents or flight attendants for assistance.



American Airlines



Mask Policy: All passengers flying on American Airlines are required to wear face coverings onboard and at the airport where your trip begins, where it ends and where you connect. Children under 2 years old are exempt. Otherwise, non-compliant passengers will be denied boarding for current and/or future travel. Limited masks may be available if you didn't pack one, but not guaranteed.

Blocked Seats: American Airlines is not limiting capacity on their flights. However, passengers may be reseated after boarding is complete to allow additional distancing if there are seats available. On full flights, travelers can optionally request to move flights at no additional charge.



Delta Air Lines



Mask Policy: Passengers and crew members are required to wear face coverings onboard, with exceptions for young children and those with some medical conditions. You are required to bring your own mask, but masks are available if needed at check-in, in lounges, boarding gates, jet bridges and onboard the aircraft.

Blocked Seats: Delta has the most generous blocked seating arrangements in the industry. For travel through January 6, 2021, Delta is blocking middle seats and limiting the number of people on board. Some planes don't have middle seats, so Delta has blocked others, like select aisle seats.







Mask Policy: Hawaiian Airlines requires all guests and employees to wear masks during boarding, in-flight and deplaning.

Blocked Seats: Hawaiian is currently restricting load factors on all aircraft to 70% in order to facilitate distancing between guests until at least December 15. Customers planning future travel should be prepared for the possibility that this policy could change before their trip.





Southwest Airlines

Mask Policy: Customers are required to wear a face covering over their nose and mouth at all times during their Southwest travel experience (in the airport and on the plane). It is highly encouraged to bring your own hand sanitizer and face covering. A well-secured cloth or mask that fits snugly against the face, covers an individual's nose and mouth, and is secured under the chin will be accepted. If you forget your face covering at home, a mask will be available for you.

Blocked Seats: Southwest is limiting the number of tickets sold on each flight to allow extra distancing for travel through November 30, 2020. This equates to blocked middle seats, although they are maintaining their open seating policy. Customers traveling together are welcome to sit together, including in a middle seat if they choose. Regardless, there will be space for separate parties to sit apart.



United Airlines



Mask Policy: United requires all passengers and crew to wear a mask throughout their flight. Masks will be provided at no cost if customers need them. Customers who refuse or who remove masks in-flight may be suspended from flying the airline again in the future.

Blocked Seats: United has not instituted capacity restrictions for their flight and passengers should be prepared for the possibility of completely sold out flights. However, if there are more than 70% of seats booked, passengers can move to another flight instead.





Agenda Item #7:

Presentation regarding COVID-19 Travel Insurance updates and who offers this insurance.

COVID-19 Travel Insurance

10.28.2020

<u>USA</u>

- Classic Vacations: Classic self-insures for pre-travel cancellations/changes. If a traveler contracts COVID before or during travel, TripMate, their third-party provider treats it as 'illness' and the medical assistance would be available through them.
- **Delta Vacations:** Covid-19 would be covered for trip cancellations/changes. They use Allianz as their third-party provider, so their policies prevail. For a temporary period, Allianz is accommodating claims for emergency medical care expenses a customer incurs due to becoming ill with COVID-19 while on their trip.
- Flight Centre: our policies are through Allianz and they do have a provision for COVID coverage through an alerts notification: emergency medical care for a customer who becomes ill with COVID-19 while on their trip, and trip cancellation and interruption if a customer becomes ill with COVID-19 either before or during their trip.
- **Pleasant Holidays:** plans cover cancellations related to COVID-19. So if someone comes down with COVID prior to their trip, and if they have the appropriate coverage, they can cancel without penalty. If a traveler were to contract COVID while on vacation, medical costs would not be covered.

CANADA

- 3 companies cover COVID-related illnesses outside of Canada: Blue Cross, Medipac, and Manulife, with coverage up to \$2 million
 - Snowbirds use Medipac for long stays
 - Manulife can be sold by travel agents
 - Premiums not much higher than last year
- Air Canada offers free COVID-related illness coverage for all flights including USA, coverage up to \$200K
- WestJet offers free COVID insurance for USA flights, coverage up to \$200K
- There are also travel insurance options available to cancel for any reason up until departure (typically provides travel credits, not cash reimbursements)

JAPAN

- All travelers from Japan are recommended to purchase "Kaigai Hoken" (oversea trip insurance).
- Majority of the Japanese Kaigai Hoken covers PCR test and hospital visits includes hospitalization.
- If they do not have Kaigai Hoken, travelers can use credit card insurance, however it is all different depending on the credit card company.
- HTJ strongly recommends "Kaigai Hoken" for all visitors. It is on HTJ COVID-19 microsite: https://www.allhawaii.jp/covid19/prepare/insurance.html

KOREA

- Most of Korean insurance companies such as Hyundai, Lotte,
 Samsung and Hanhwa provide travel insurance covering hospital expenses if an insured person gets injured or sick due to disease.
- As COVID-19 is classified as a disease, travel insurance covers hospital costs if a traveler contracts COVID-19 during travel.
- Insurance costs depend on trip length and coverage range. Average cost of travel insurance is about \$50 - \$70.

CHINA

- Prior to May, many Chinese airlines (e.g. China Southern, Chengdu Airlines, Shenzhen Airlines, Shandong Airlines, etc.) provided COVID-19 travel insurance. However, none of them are currently providing such insurance.
- Some multinational insurance companies in China such as Allianz Insurance, STARR Insurance, and AXA Insurance do provide medical coverage travel insurance to Chinese traveling overseas.

TAIWAN

- Fubon Life: covers medical treatment, hospitalization and recovery costs due to COVID-19 for up to 75 years old for maximum US\$125,000 coverage.
- Shin Kong Life: covers hospitalization costs due to COVID-19.
- Taiwan Life: covers 1-time COVID-19 medical insurance should the insured person and family become infected.
- China Airlines and EVA Air: currently no COVID-19 related insurance.
 Both airlines do offer refund of tickets if the government imposes border restrictions.

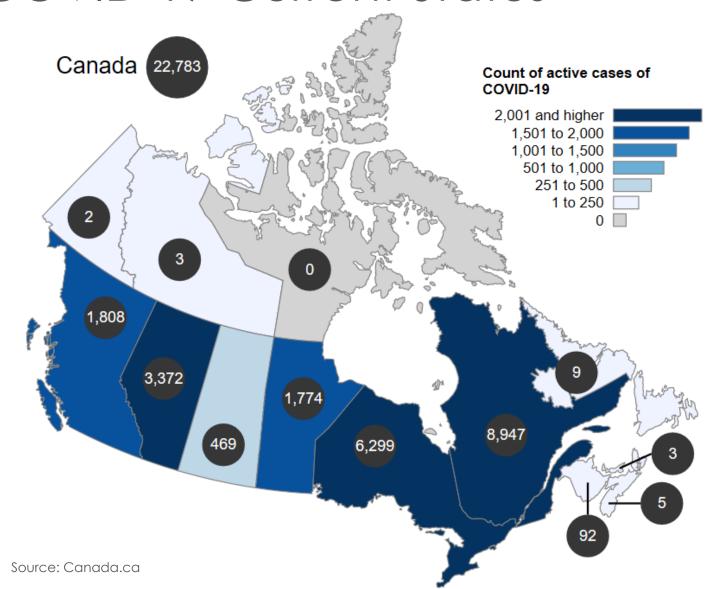
Agenda Item #8:

Presentation by Hawai'i Tourism Canada's





COVID-19 Current Status



- Reopening stages:
 - AB & BC phase 3
 - ON & QC phase 2 (back)
- 9,600 total deaths

COVID-19 Testing



Health Care System	Canada	U.S.	
Regulation	By Province	By State	
Operation	Ministry of Health (Provincial)	Department of Health	
Approval	Health Canada	U.S. Food and Drug Administration (FDA)	
Standards	Provincial Accreditation ISO 15189, CLIA, College of American Pathologists	Clinical Laboratory Improvement Amendments (CLIA)	
Guideline	Pan-Canadian COVID-19 Testing and Screening Guidance: Technical guidance and implementation plan National polymerase chain reaction (PCR) testing indication guidance for COVID-19	Centers for Disease Control and Prevention, Multiplex Assay for Flu and COVID-19	
PCR test	 Real-time reverse- transcriptase polymerase chain reaction (RT-PCR) Loop-mediated isothermal amplification (LAMP) 	Real-time reverse- transcriptase polymerase chain reaction (RT-PCR)	
Specimen	 Nasopharyngeal or oropharyngeal swabs Saliva 	1) Nasopharyngeal or oropharyngeal swabs2) Saliva	

COVID-19 Testing Recommendation



Test	RT-PCR test		
Approval	Health Canada		
Guideline	Pan-Canadian COVID-19 Testing and Screening Guidance: Technical guidance and implementation plan National polymerase chain reaction (PCR) testing indication guidance for COVID- 19		
Specimen	Nasopharyngeal or oropharyngeal swabs or Saliva		
Antigen/antibody test	Antigen tests approved under Interim Order similar to FDA EUA		
Timing	Before 72 hours of departure International flights take time to check-in and flight (more than 12 hours in total)		

Health Canada is monitoring the labs & hospitals through the provincial universal health care system and approve all tests for COVID-19. Only private labs provide tests for travel needs. ISO certification of international labs.

Health Canada refers to guidance published by the U.S. Food and Drug Administration (FDA) on <u>antigen</u> <u>detecting tests</u>. This guidance outlines the requirements that these products must meet.

- Alberta
 Testing in approved labs by American Pharmaceutical
 Association
- British Columbia
 Private testing for travel purposes available,
 COVID-19 tests are analyzed at LifeLabs
- Ontario

McKesson Canada is currently supporting pharmacy tests in Rexall pharmacies (analysis done in US labs) / Shoppers key test sites



Airline Update

- Air Canada flying to some US cities
- Plan to resume the YVR-HNL flight starting December 1st depending on the pre-arrival testing policy measures
- AC announced partnership with Cleveland Clinic to develop biosafety measures (CleanCare+)
- AC working with LifeLabs, DynaLabs and TransPharm for rapid testing upon arrival in Canada and before boarding to operate COVID-free flights & approved testing locations
- AC working with pharmacies across Canada (Shoppers)
- Complimentary insurance for COVID-related illnesses
- AC Chief Medical Officer, Dr. Jim Lung suggests working with Hawai'i DOH to discuss COVID-free flights to Hawai'i





Airline Update (cont'd)

- WestJet flying to 3 US cities & limited international destinations
 - LAX, Palm Springs & Phoenix (due to Delta JV)
- Intention to fly to Hawai'i in December depending on the pre-arrival testing policy
- WS implemented a number of safety measures for staff & guests
- WS working with University of British Columbia for rapid testing before boarding in YVR airport
- WS working with government, Air Canada and airports including YEG, YVR, YYZ for rapid testing



Border & Travel Policy

- The US-Canada land (ground) border to remain closed until November 21st, this period may be extended depending on the COVID-19 cases in the mainland USA
- Visitors to Canada (including residents) must quarantine 14 days
- AC pilot test of tests upon arrival in YYZ (voluntary)
- Airlines & airports working with the government to approve rapid testing for arrivals & pre-boarding to avoid quarantine & reopen travel
- Calgary offering rapid testing for arriving pax. (Oct 22nd)
- Insurance companies, airlines & tour operators providing coverage for COVID-related illnesses including quarantine costs
- More than 60 countries currently accept Canadian tourists







Oct 2, 2020

The State of Hawaii

Re: Air Canada's PCR customer testing solutions

Aloha mai kakou.

We at Air Canada have been actively investigating and partnering with lab PCR providers to offer solutions for our passengers for whom a negative PCR test is required for entry. As we plan and prepare to resume twice weekly 787 service between Vancouver and Honolulu on December 6th, we are doing everything we can to ensure that our customers enjoy a safe journey and are able to meet the COVID testing requirements for entry to Hawai'i.

I am enclosing accreditation for several providers with whom we are working. Please note that all PCR COVID testing is conducted with diagnostic equipment approved by Health Canada.

Similar to the FDA, Health Canada serves the same role and has oversight and regulatory approval powers for all medical devices permitted in Canada. Health Canada has been even more conservative than other jurisdictions in approving testing devices and only just recently approved a point of care device months after they have been approved internationally.

https://www.canada.ca/en/health-canada/services/drugs-health-products/covid19-industry/medical-devices/authorized/list.html

The lab providers whom we work with are all ISO 15189 certified, which is the international standard for lab quality assurance.

https://www.iso.org/standard/56115.html

I trust that the information provided will help guide your decisions, and please feel free to reach out anytime to contact me on this matter. Mahalo for your kokua as we jointly overcome this unprecedented event.

Sincerely,

Jim Chung MDChief medical officer

Médecin en chef T 905 676-2400 | F 905 676-2011









October 1st, 2020

Aloha!

WestJet and WestJet Vacations want to ensure that Hawaii is aware that the Islands are very important to the company. Since our first flights into Maui and Oahu in 2005 we have seen constant growth. The partnership is very important to us and with these uncertain times with the pandemic, these partnerships will continue and in fact will be even more important.

For your information we are moving forward with our discussions with hotels on contracting for 2021, so we are ready when we are advised that flights can once again commence. We are hopeful to begin our Hawaii flights in mid December.

We are aware that you have just announced the 72 hour testing prior to arrival, we appreciate this is a step forward, but for the Canadians there are still concern as to If the testing done here is valid in Canada and in turn if testing can be done in a timely manner for the guests so they can indeed fly. The tests are being approved by Health Canada, which is the equivalent to the FDA in Canada, so we hope you will consider allowing the Canadian tests to be acceptable.

The good news is Rapid Testing is being initiated here in Canada which in turn will assist with this. All of this combined we are hoping will gain the confidence that we need to provide to our mutual guests.

I appreciate all the efforts that the Hawaii Tourist Office in Canada is doing to coordinate the efforts so we can move forward on our winter flights to the beautiful islands of Hawaii.

Mahalo,

Dave Cecco

Mano

WestJet

Agenda Item #9:

Presentation by Hawai'i
Tourism Japan's on what
booking pace looks like from
our wholesale partners

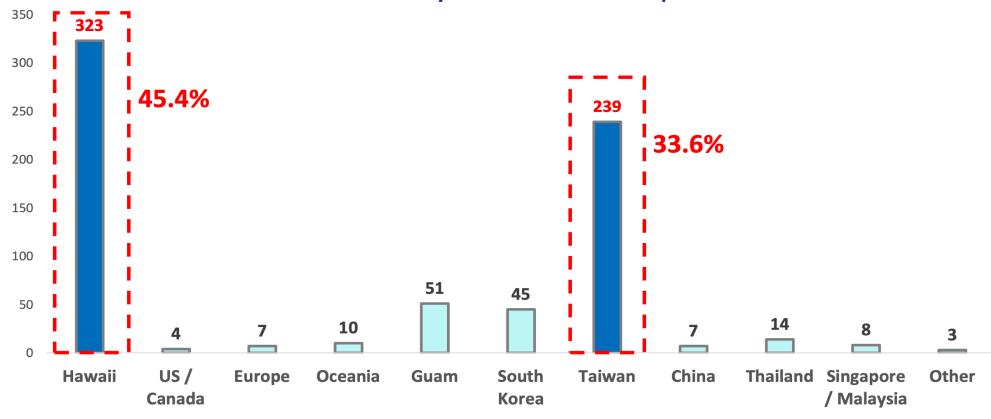


~Japan Market Updates~

October 28, 2020

Tourism Recovery Forecast

Which destination will you first visit once the pandemic subsides?



45.4% responded that Hawaii will be their first destination to visit when the COVID-19 pandemic subsides.

Hawaii Forecast

Top 10 Travel Companies' Forecasts





2020 HTJ Forecast: -82% (vs 2019) less than 300,000

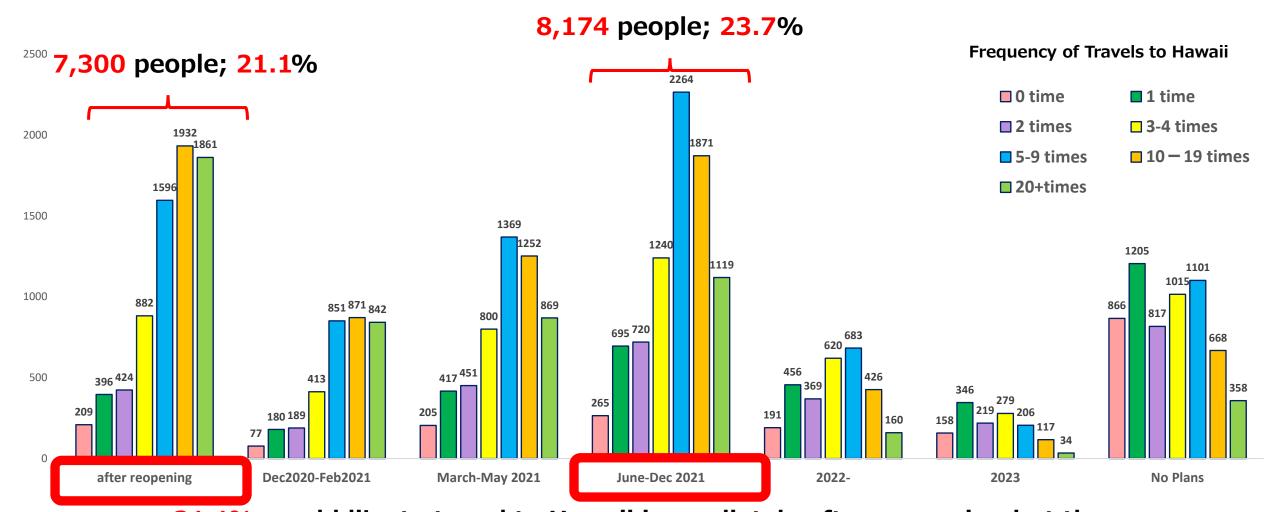
294,000 as of 8/31/20

2021 HTJ Forecast: **-60%** (vs 2019) 630,000~

	QTR 1	QTR 2	QTR 3	QTR 4
Forecast	10%	25%	60%	60%
vs 2019	(37,493 pax)	(89,827 pax)	(263,545 pax)	(241,637 pax)

Consumer Sentiment for Travel to Hawaii

WHEN DO YOU PLAN TO VISIT HAWAII NEXT?



21.1% would like to travel to Hawaii immediately after reopening but those wanting to visit Hawaii between June to Dec 2021 was at the highest ratio.

N = 34,554

Japan Market Reopen

Airlines Situation

Flight Operations (August ~)

Airlines	Flights *From Japan	Remarks
ANA	10/5, 1911/6, 20	- 4 flights - 246 seats (Boeing 787-9)
HAWAIIAN AIRLINES.	 10/3, 10, 17, 24, 31 11/7, 14, 21, 28 	9 flightsOnce a week278 seats(Airbus A330-200)
JAPAN AIRLINES	 8/1, 10, 20 & 30 9/15, 29 10/11, 24 11/10, 23 	- 10 flights - 186 seats (Boeing 787-8)

Potential resumption of services from December onwards











Resumption of Travel

- Pre-Travel Testing
 Program Approved by Hawai'i
- 21 Japanese Trusted Testing Partners
- Effective 11/6, 2020



Mahalo nui loa

HAWAI'I TOURISM

JAPAN

Agenda Item #10:

Presentation by Hawai'i Visitors
& Convention Bureau's
regarding the domestic
travelers concerns and
questions, along with an
update on their activities



Agenda

- Kuleana Health & Safety Campaign
 - GoHawaii.com
 - Health & Safety messaging
 - Customer Journey Health & Safety Protocols
 - Safe Travels Video Message
 - Message Delivery Along The Traveler Journey
 - Airlines
 - Hawai'i Airports
 - Travel Industry
 - Public Relations / Earned Media
 - Social Media
 - HVCB Member Communications
- Mālama Hawai'i Update





GoHawaii.com



Gohawaii.com





The Visitor's Journey: Health Procedures and Protocols



Safe Travels Video Message

Message Delivery Along The Traveler Journey

Airlines



Contemporary Airline Messaging Journey

Shopping Booking Post-Booking Booking Inflight

- search engine
- reviews
- ota's
- travel agency
- direct

- message before final purchase
- confirmation email

- ready-to-fly checklist
- app registration
- email notifications with advisory of face coverings, destination policies and guidelines
- gate announcement
- boarding message

 video content served up via seatback or digital IFE (inflight entertainment)



Airline Communication Examples - Journey

Dialogue and participation by our airline partners is the best it has been in years. We have asked them to share some specific examples as to how they are engaging with their customers during the various stages of their journey. They are communicating health, safety and testing protocols in preparation for their arrival in Hawaii.

- Pre-Arrival (up to 7 days out) Carriers are communicating with their customers via SMS text and email up to 7 days remind to upload test results and that their test must be from a trusted provider.
- Pre-Arrival (72 hours prior) SMS notifications 72 hours prior to departure notify customer that they are within the testing window and must upload results to Safe Travels, including URL
- Check-In Advisory during check-in (kiosk and through app) noting requirements for travel to Hawaii

- Gate Poster w/ list of 'trusted testing partners' at departure gate.
 - Mālama Hawaii gate banners
 - Signage with QR code is displayed at boarding gate, which links to Safe Travels site with pre- flight announcements.
 - Briefing document at gate with FAQs for employees.
- Inflight Announcements prior to take-off and arrival.
 - Airlines are in the process of cycling sharing HVCB's Kuleana – Health & Safety video on aircraft
 - Hawaiian Airlines and Southwest Airlines start Oct./Nov. 2020



Airline Communication Examples - General

Website updates:

- Homepage Hawaii travel info
 - Testing options
 - · What to know before you go
- Website content
 - Island-specific advisory on Hawaii hub page
 - Island-specific arrival details (testing/process/wait times) to testing page
 - Testing options organized by geography
- Blog posts about traveling to Hawaii (2)
 - What to expect
 - How to be mindful traveler
 - Purchase path messaging (flight results, payment page, and view reservation page)

Social Media

- General awareness posts
- Reactive social care guidance
- Influencer program in development for Mālama Hawaii campaign

Email

- Email advisory in confirm email
- Daily post-booking email sent 10 days before departure
- Daily email sent to guests 5-7 days before departure
 - Get tested
 - Get registered
 - Check- email reminder
 - Upload your testing information

 Safe Travels Guide is a resource for employees and customers on next steps after obtaining a test result

Message Delivery Along The Traveler Journey

Hawai'i Airports

Hawai'i Airports

Video with an introduction by
 Governor Ige at baggage
 claim started Oct. 14th at HNL and is airing at all major airports statewide





Hawai'i Airports – DOT Signage











Message Delivery Along The Traveler Journey

Travel Industry

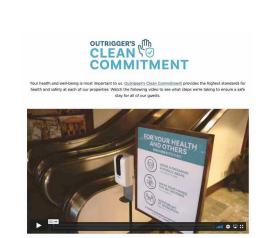


Travel Industry

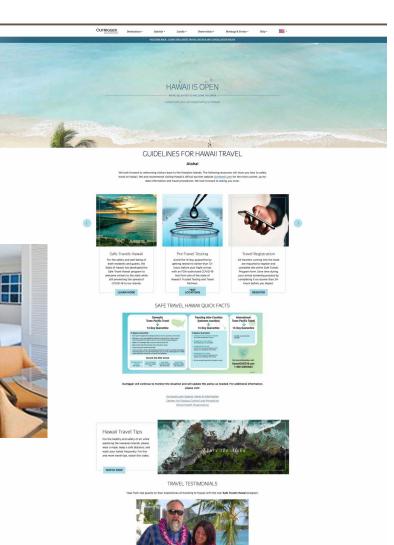
- In-room Network (NMG: Living TV, HOKU TV, Real Hawaii) has started airing in these hotels through December 31, 2020:
 - Alohilani (839 rooms)
 - Halepuna
 - Outrigger Hotels

It will roll-out in other hotels across the islands based on video installation and opening dates.

 In multiple meetings and presentations a link to the video has been provided to all industry partners to use in-room, onproperty, on email reservation confirmations









Travel Industry Examples Marriott Hawai'i Properties

- In-room
- Property Signage
- Reservation Confirmation Email



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Stay Well: Preparing for Your Upcoming Stay

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Pack Your Mask

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We wear because we care - and we require all guests to do the same. The <u>City & County of Honolulu</u> has mandated that face masks be worn at all times in indoor & outdoor public spaces, including throughout the resort. It is also required for all guests and associates to maintain a social distance of at least 6 feet.





















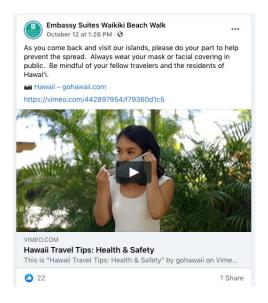




Travel Industry Examples

- Embassy Suites Waikiki Beach Walk Social media
- Anelakai Adventures (island of Hawai'i)
 Activity email confirmations and
 website





Anelakai Adventures

Choose An Adventure v Book Now FAQ About v Gallery Pon

BOOK NO



Message Delivery Along The Traveler Journey

Public Relations/Earned Media



Public Relations/Earned Media

- Press release distribution on Oct. 14
 - Db of Approx. 1,300 media



Los Angeles Times

Hawaii reopens for tourism amid more masks, fewer leis



Many arriving passengers in Honolulu faced long waits as officials checked to be sure all arrivals had answered a health questionnaire, had their temperatures taken and shown proof of a negative coronavirus test. (Kent Nishimura / Los Angeles Times)





Gutted Hawaii tourism industry preps for new arrivals

it Hanson, for CNN - Updated 14th October 2020

A different Hawaii

Beginning on October 15, Hawaii's pre-arrival testing program will allow tourists to skip the mandatory 14-day quarantine with a negative Covid test.

But travelers may not recognize the Hawaii that greets them. Mask mandates, temperature checks, closures, and contact tracing requirements are just a few of the measures 2020 arrivals should anticipate at touchdown.

With tourism's much-anticipated rebirth on the horizon, the state has made it clear that travelers are expected to abide by local governance, which includes wearing a mask or facial covering when in public and following physical distancing guidelines.



Hawaii, a mask or facial covering is required in public





Public Relations/ Earned Media

PR Newswire Picked up by 105 media to-date



Pickup by PR Newswire Media Partner Websites - Top Outlets

Outlet Name		Location	Source Type	Industry	Potential Audience
Market Watch	<u>MarketWatch</u>	United States	Financial News Service	Financial	27,087,070 ^[1] visitors/month
AP	AP NEWS [The Associated Press]	United States	News & Information Service	Media & Information	20,971,392 ^[1] visitors/month
Seeking Alpha ^α	Seeking Alpha	United States	Financial News Service	Financial	7,330,283 ^[1] visitors/month
CISION° PR Newswire	PR Newswire	Global	PR Newswire	Media & Information	6,382,298 ^[1] visitors/month
BENZINGA	<u>Benzinga</u>	United States	Online News Sites & Other Influencers	Financial	3,565,106 ^[1] visitors/month
M RNINGSTAR*	<u>Morningstar</u>	Global	Financial Data, Research & Analytics	Financial	2,402,266 ^[1] visitors/month
wfmj.	WFMJ-TV NBC- 21 [Youngstown, OH]	United States	Broadcast Media	Media & Information	772,362 ^[1] visitors/month
Daily Journal	Daily Journal [Tupelo, MS]	United States	Newspaper	Media & Information	523,488 ^[1] visitors/month
WBOC 16	WBOC-TV CBS- 16 [Salisbury, MD]	United States	Broadcast Media	Media & Information	338,809 ^[1] visitors/month
2 NEWS	KTVN-TV CBS-2 [Reno, NV]	United States	Broadcast Media	Media & Information	333,071 ^[1] visitors/month



Public Relations/Earned Media

- Good Morning America
- Local News
- Nā Leo TV channels





Message Delivery Along The Traveler Journey

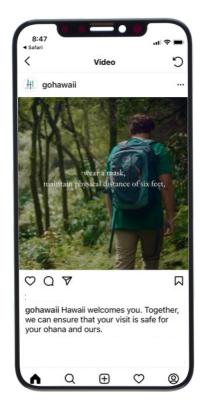
Social Media

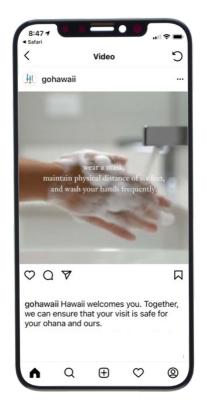


Social Media

- Facebook
 - paid media delivers video messaging to residents & visitors
- Instagram
 - paid media delivers video messaging to residents & visitors
- YouTube
 - posted on GoHawaii YouTube channel







Message Delivery Along The Traveler Journey

HVCB Member Communications

HVCB Member Communications

- HVCB Membership Webinar (10/7)
 - Presented recovery plan with health and safety messaging
 - 360 industry registrants
- HVCB Membership Enewsletter (10/12)
 - Provided marketing plan and asset toolkit for use
 - Sent to 3,635 (5,931 total opens)
- HVCB Kahe Wale Membership Enewsletter (10/16)
 - Sent to 3,702 (2,268 total opens)
- HVCB Social Media
 - Promoted across Facebook, Instagram, LinkedIn



HVCB Marketing Presentation Wednesday, October 7 1:00p.m. - 2:00p.m.

Dear Members

Please join us for a presentation on the HVCB marketing strategy. We will share research, updates and the overall plan to welcome visitors back to Hawaii. This presentation is for HVCB members and invited guests only. Please register below. We look forward to seeing you.

REGISTER NOW -





Stop the spread. Wash your hands frequently for 20 seconds each time, https://www.gohawaii.com/travel-requirements/travel-guide

Engagements

Hawaii Tourism Authority

People Reached



People Reached

4 Engagements Boost Post



HVCB Trade Communications

Wholesalers

Posted to websites, including on itineraries and statements, linking on social media

- Pleasant Holidays
- Classic Vacations
- Delta Vacations
- American Airlines Vacations

Consortia

Posted to websites, distributed in agent Enewsletters

- Signature Travel Network
- Virtuoso
- Ensemble Travel Group
- TravelSavers



Enewsletters

- 356,000 direct to our core consumers
- Industry Partners for use in their communications:
 - 3,300 HVCB membership database
 - 32,195 U.S. travel agents
 - 26 wholesale and consortia
 - 24 airlines
 - 22 OTAs







Dear Members

For months, we have closed our islands to outside visitors to keep our home and people safe. Now, it's time to open our home to visitors, to help rebuild our economy, restore jobs and share aloha with the world. But we must do so thoughtfully. Our mission is to drive awareness that we are welcoming visitors, but we need to reset our approach to accomplish this. It can no longer be just be about reaching and inspiring Avid Travelers to come to Hawaii. We need to guide visitors to experience Hawaii while following safe health practices, and to connect with our communities and culture on a deeper level, ultimately to give back to the destination and to help preserve it for the future. Simply stated, the objective is to attract visitors who will leave Hawaii better than when they arrived. To do so, we'll let visitors know that it's not only time to come back to Hawaii. it's time to give back to Hawaii.

With our Malama Hawaii campaign in place, we now have the opportunity to share our approach to support mindful visitor behaviors with pre and post arrival messaging while maintaining our brand positioning and integrity. To allow you to see details of the most current Malama Hawaii destination brand marketing direction and assets, an "HVCB 2020 Brand Assets - Partners" toolkit has been created for your use, and is linked below. Housed within it are folders containing updated Hawaiian Islands brand guidelines, as well as various assets including video, photography, copy messaging, social media. logos and information about the Hawaiian culture to use in your sales and marketing initiatives. Of special importance is the Health and Safety Video, to be used pre-arrival, with links on email reservation confirmations, in-flight, and on property, aimed at educating our visitors on COVID-19 safety and health protocols. You will need to enter your name and email address to access the toolkit and you will have unlimited downloads for one year. Feel free to share access with your internal departments, production teams, etc. If you missed the membership webinar on our marketing strategy, the presentation deck is included for your review. It will give you more insight into our Malama Hawaii

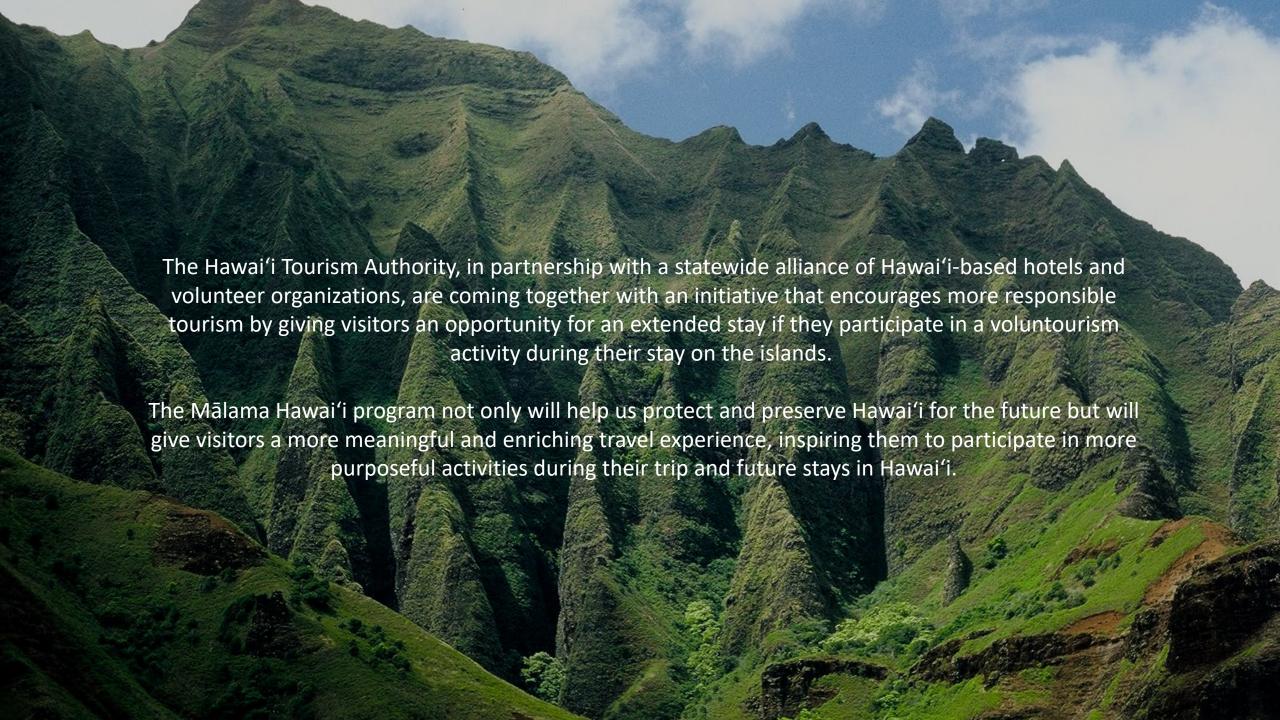
Please reach out with questions and comments.

Mahalo,

John Monahan President & CEO

HVCB 2020 Brand Assets - Partners Toolkit







MĀLAMA HAWAI'I

Digital and Social Creative Units











Promotional Description

The following copy should be leveraged and adapted when including a more detailed description of the program:

This is more than an invitation to come to Hawai'i. This is an invitation to reconnect. To rediscover. To rethink how we travel. By slowing down. And really getting to know a place. The longer you stay, the more your trip gives – to you and to Hawai'i. So today, we welcome you not just to go, but to stay longer with a free night from your preferred participating hotel. And when you do? Mālama (care for) Hawai'i with us. By forming a deeper connection with our culture. By helping us perpetuate the beauty of the land. And leaving with a trip that truly stays with you, too.

Logo lockup with tagline





Logo lockup without tagline







MĀLAMA HAWAI'I OFFER

As hotels around the state reopen their doors, let's come together as one 'ohana and give our guests the opportunity to stay a free night if they engage in a volunteer project to help regenerate the natural beauty and culture of Hawai'i.







































Partner Examples

'Alohilani Resort Waikīkī Beach

- 5th Night Free
- Offering a tree planting experience through Gunstock Ranch
- Shared offer with guest database and travel partners

Wailea Beach Resort

- 5th Night Free
- Arranging outdoor Hawaiian quilting sessions; quilt squares will be put together and donated to kūpuna in the community

Outrigger Waikiki Beach Resort

- 3rd Night Free
- Created a 4-hour immersive sustainability experience with Kualoa Ranch

'ALOHILANI RESORT

WAIKĪKĪ BEACH

UNFORGETTABLE, SOULFUL HAWAII PACKAGE

A meaningful trip for two filled with the natural beauty of Oahu. Make lifelong memories together as you journey from Waikiki to the North Shore where you'll find Gunstock Ranch and a thriving forest overlooking the Pacific Ocean. As you travel through the ranch by horseback or UTV amidst the gentle ocean breeze, you'll come upon the 'Alohilani forest to plant your very own indigenous tree. Back at the resort, enjoy dinner for two at the world-renowned, Morimoto Asia Waikiki by iron chef Massharu Morimoto.

— MĀLAMA —

HAWAI'I

TAKE A TRIP THAT GIVES BACK

Your soulful journey includes:

- Stylish Ocean View or Premier Ocean Front accommodations
- Every 5th Night is complimentary
- One Day Luxury Car Rental by Enterprise Rent-A-Car®
- North Shore Tree Planting experience at Gunstock Ranch. Learn more about the 'Alchilani forest and our pledge to plant 100,000 trees'
- \$200 resort dining credit valid at Morimoto Asia, Momosan, or Swell Pool & Bar
- Ocean cultural blessing for two
- Valid for travel November 1 December 23, 2021 (blackout dates may apply)



Planter's Experience

Come to Gunstock's Hawaiian Legacy Forest to plant a Monarch Milo tree. Bring your friends or the whole family and make a difference together.









PROGRAMMING

Volunteer Projects

Sustainable Coastlines Hawaii

- Small Kine Beach Cleanups
- DIY Beach Cleanup Kits

Uluha'o o Hualālai

 Engaging families in the stewardship of Hualālai's natural and cultural resources











Next Steps

Mālama Hawai'i Landing Page

- Launching Nov. 2
- Links to participating partners and volunteer organizations

Public Relations

- Press release distribution on Nov. 9
- Continue pitching
- Media/influencer visits

Social Media & Email

- Deploying Nov. 9

Paid Media

- Deploying Nov. 9
- LA, SF, PDX, SEA



