



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

**REGULAR MARKETING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY**

Po'akolu, 18 Nowemapa 2020, 10:30 a.m.
Wednesday, November 18, 2020 at 10:30 a.m.

Hālāwai Kikoho'e
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_woXJruWGSZCHLiIx2dqCw

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

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

1. *Ho'omaka A Pule*
Call to Order and Pule
2. *'Āpono I Ka Mo'ō'ōlelo Hālāwai*
Approval of Minutes of the October 28, 2020 HTA Marketing Standing Committee Meeting
3. ~~*'Āpono I Ka Papahana Ka'a'ike Kāko'o 'Oihana Li'ili'i*~~
~~Approval for funding a communication plan for guests to frequent and support small businesses. Presentation by Sherry Menor-McNamara, Chamber of Commerce of Hawaii'i, President & CEO~~
4. *Hō'ike A Hawaii'i Tourism Korea, Canada a me Taiwan No Ke Kūlana Huaka'i*
Update on Trusted Travel Partners for Korea, Canada and Taiwan presentation by the respective GMTs



5. *Hō'ike A Ka Luna Noi 'i 'Oihana Ho'okipa No Nā 'Ākena Huaka 'i*
Update on travel agent booking pace by Jennifer Chun, HTA's Director of Tourism Research

6. *Hō'ike A Hawai'i Visitors & Convention Bureau No Ke Kūlana Huaka 'i Pū'ulu*
Update on group general trends, cancellations and booking pace by John Reyes, HVCB Senior Vice President, Chief MCI Sales Officer

7. *Ho'oku'u*
Adjournment

*** *'Aha Ho'okō: Ua hiki i ka Papa Alaka 'i ke mālama i kekahi hālāwai kūhelu i kū i ka Hawai 'i 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 Alaka 'i kūkā a ho'oholo 'ana i nā nīnūnē a nīnau i pili i ko ka Papa Alaka 'i kuleana me ko ka Papa Alaka 'i 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 Hawaii 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 Hawaii'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
October 28, 2020

HTA Marketing Standing Committee Meeting



**MARKETING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY
Wednesday, October 28, 2020
Virtual Meeting**

MINUTES OF MARKETING STANDING COMMITTEE MEETING

COMMITTEE MEMBERS PRESENT:

Kelly Sanders (Chair), Fred Atkins, George Kam, Kyoko Kimura, Sherry Menor-McNamara, and Benjamin Rafter

HTA STAFF PRESENT:

John De Fries, Keith Regan, Pattie Herman, Marc Togashi, Marisa Yamane, Kalani Ka'anā'anā, Caroline Anderson, Jennifer Chun, and Jadie Goo

GUESTS:

Representative Richard Onishi, Kevin Sahara, Jeffrey Eslinger, Susan Webb, Eric Takahata, John Monahan, and Jay Talwar

LEGAL COUNSEL:

Gregg Kinkley

1. Call to Order:

George Kam called the meeting to order at 10:30 a.m. Keith Regan, HTA Chief Administrative Officer, provided instructions to the general public with regard to submitting testimony. Mr. Regan confirmed the attendance of the Committee members by roll call. Mr. Regan turned the floor over to Mr. Kam.

2. Approval of Minutes of the September 23, 2020 HTA Marketing Standing Committee Meeting:

Mr. Kam requested a motion to approve the minutes of the September 23, 2020 HTA Marketing Standing Committee meeting. Benjamin Rafter made a motion, which was seconded by Kyoko Kimura. The motion was unanimously approved.

3. 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:



Mr. Kam recognized Kevin Sahara of Expedia Group to present on market demand for Hawai'i in 2020 and 2021. Mr. Sahara reported that 2020 had a strong start for the industry, but has been a roller coast since March due to COVID-19. He said Expedia has a number of global initiatives industry-wide to help destinations rebound and restore the industry. He noted that Expedia highlights and has a search filter for flexible airfares. Mr. Sahara added that 70% of the hotel rates on Expedia are refundable in an effort to restore customer confidence. He said that at the hotel level, Expedia is highlighting safety measures such as contactless check-in and check-out, hand sanitizer in rooms, enhanced cleaning, social distancing, etc. He noted that this information is compiled in Expedia Partner Central, which is developing health and hygiene checklists for hotel properties and is constantly updated.

Mr. Sahara reported that Expedia has committed \$250 million for partner recovery efforts, which include investing commissions back into their partners, reducing commissions over a three month period, and amending payment terms to optimize cash flow for hotel properties. He noted that key events in Hawai'i negatively affected demand such as the July 14th extension of the 14-day quarantine to September 1st and the August 19th pre-test program delay to October 1st. He added that cancelations have stabilized and become much less volatile with the October 15th reopening date.

Mr. Sahara discussed a study of the value of the online travel agency (OTA). He said two-thirds of Americans surveyed believe things will return to normal in 2021. He noted that there is an increase in demand for alternative accommodations with respondents citing less exposure to the virus and lower population centers. Mr. Sahara said another rising trend is flexcation, which is an extended leisure and business vacation favored by generation X and older millennial travelers with families that are able to work remotely. He noted that OTAs capture one of every five domestic hotel bookings and one of every three international hotel bookings and are playing a more important role in overall hotel bookings. Mr. Sahara added that 61% of travelers plan or research at least one aspect of their trip through an OTA that help travelers navigate the marketplace. He said millennials and generation X travelers are the groups most likely to travel over the next three months. He noted that OTA travelers spend 16% more than direct bookers. He added that OTA travelers spend more time in cities and generate more economic stimulus for the destination. He said more travelers are relying on OTAs to assist with booking decisions because of the ability to compare properties and locations.

Mr. Sahara reported that interest in domestic travel is increasing with pre-test options and with restrictions remaining on international travel. He noted that there is a 100% increase in



domestic interest in Waikīkī Beach. He said the velocity of demand will depend on variables like restrictions, opening safely, and vaccines.

Mr. Sahara said Expedia is creating a \$25 million advertising fund, which, when combined with media solution data and product tool kits, will help Hawai'i reengage with travelers. He noted that Expedia is launching the Hawai'i campaign in November, will feature health and safety information for the state, and educate travelers as to what they can expect by island.

Mr. Rafter asked how Hawai'i compares to other long-haul leisure markets in terms of volume recovery. Mr. Sahara responded that it has been more positive lately, and it is accelerating much faster than other destinations.

Fred Atkins asked Mr. Sahara if he has data on how the recovery is tracking against Cabo San Lucas or Mexico. Mr. Sahara responded that he does not have that data on hand, but will follow up with the Committee. Mr. Atkins asked how the current conversion of searching to booking compares to 2019. Mr. Sahara responded that he does not have that data on hand, but will follow up with the Committee.

Pattie Herman, HTA Vice President of Marketing & Product Development, noted that wholesalers are seeing strong traveler interest in Maui and asked Mr. Sahara if he knows why that trend is happening. Mr. Sahara responded that he cannot speak to wholesaler trends, but noted the large increase in domestic interest compared to 2019 for a number of Hawai'i destinations.

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

4. 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":

Mr. Kam recognized Jennifer Chun, HTA Director of Tourism Research, to present on booking pace and countries with "Do Not Travel Lists" & "14-day Quarantines". Ms. Chun reported that HTA's daily briefings include data from Global Travel Agency Pro. She said booking pace for Japan is still significantly behind 2019, but there is a jump in December with the announcement of the Japan pre-test program. She noted that as testing partners are named, the booking pace will likely increase even more.

Ms. Chun reported that Canadian travelers are still booking travel to Hawai'i in 2020 and 2021, but there is very little activity because of uncertainty with restrictions on Canadian



travel. She reported that the Australian borders remain closed, but there is still some level of activity. She noted that this data only tracks bookings through travel agencies. Ms. Chun explained the data tracked island-by-island through the third quarter of 2021. She added that the scale of domestic travel is very different from the other international markets, and most of the booking activity is from the domestic market.

Mr. Rafter said that he appreciates seeing the pace data and that, moving forward, pace data will be more important than consumption data. Ms. Chun responded that HTA is planning to start publishing this data on a weekly basis on the HTA website.

Mr. Kam invited the public to provide testimony, and there was a question. Sun Wong asked what types of companies are included in travel agencies and what percentage of overall bookings does that represent. Ms. Chun responded that travel agencies include all independent travel agencies, online travel agencies, and wholesale travel agencies. She noted that Global Travel Agency Pro does not have data for direct bookings so she cannot determine that exact percentage.

Ms. Chun then discussed countries with “Do Not Travel Lists” & “14-day Quarantines.” She reported that Japanese visitors can travel to Hawai'i, but require a 14-day quarantine upon returning to Japan. Canadian visitors cannot travel to Hawai'i for leisure, and all Canadians require a 14-day quarantine and COVID-19 test upon return to Canada. Australia's borders remain closed without an exemption. New Zealanders are advised not to travel overseas and require a negative COVID-19 test and 14-day quarantine upon their return to New Zealand. Chinese visitors cannot travel to Hawai'i, and all Chinese travelers require a negative COVID-19 test within 72 hours of their return and a 14-day quarantine. Koreans can travel to Hawai'i, but require a COVID-19 test upon their return and a 14-day quarantine. Taiwanese visitors can travel to Hawai'i, but require a 14-day quarantine upon their return to Taiwan. German visitors can travel to Hawai'i, and require a negative COVID-19 test within 48 hours of their return to Germany and a 14-day quarantine. Visitors from the United Kingdom (UK) can travel to Hawai'i, and beginning December 1st, only require a seven day quarantine upon their return to the UK.

Ms. Kimura noted that Japan is like Korea with a COVID-19 test required on arrival.

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

5. 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:

Mr. Kam recognized Jeffrey Eslinger of HVCB to present on airline load factors and safety protocol. Mr. Eslinger reported that Alaska Airlines, American Airlines, Hawaiian Airlines, Southwest Airlines, and United Airlines are approved travel partners with their own testing programs.

Mr. Eslinger then discussed mask and social distancing policies on the major airline carriers. On Alaska Airlines, all crew members and passengers ages 2 years and above must wear masks. He noted that there is 65% load capacity with blocked middle seats though exceptions can be made for families traveling together. On American Airlines, all crew members and passengers ages 2 years and above must wear masks, and any travelers not wearing a mask will be denied entry on the flight. Mr. Eslinger noted that American Airlines is not limiting load capacity, but travelers can move to a different flight with a lower load factor at no additional charge. On Delta Airlines, all passengers and crew members must wear masks and will provide masks if necessary. He noted that Delta Airlines has the most generous seat blocking arrangements in the industry. On Hawaiian Airlines, all passengers and crew members must wear masks. He noted that load capacity is capped at 70%. On Southwest Airlines, all passengers and crew members must wear masks, and masks are available if a traveler requires one. Mr. Eslinger noted that middle seats are blocked, but passengers traveling together can sit together. On United Airlines, all passengers and crew members must wear masks. Passengers may be suspended from future flights if they remove their mask in-flight. He noted that United Airlines has no load capacities. However, if more than 70% of seats on a flight are booked, passengers can move to another flight at no additional charge.

Sherry Menor-McNamara asked if the airlines are making announcements and providing information to passengers specific to each county. Mr. Eslinger responded that Jay Talwar will be better able to answer that question.

Ms. Kimura asked if Hawaiian Airlines and United Airlines can provide the same testing program in Japan. Mr. Eslinger responded that Eric Takahata will be able to provide that information.

Mr. Kam invited the public to provide testimony, and there was a question. Yvonne McDowell asked if HVCB's airline partners provide the net number of airline tickets purchased. Mr. Eslinger responded that HVCB does not have that specific information.



6. Update Regarding Hawai'i Tourism Oceania Border Closing:

Mr. Kam recognized Ms. Herman to provide an update regarding Hawai'i Tourism Oceania. Ms. Herman reported that flights are not scheduled until June 2021. She noted that Hawaiian Airlines has a flight to Australia scheduled for mid-February, but it is a holding flight and may be pushed back depending on the government. She explained that there is a mutual understanding that there would currently be no marketing for Oceania to save money. Meanwhile, Ms. Herman said they have been in meetings with the Department of Health (DOH) and the Attorneys' General Office (AGO), and their respective counterparts in other countries. She reported that there have been multiple meetings with the Korean government that have gone well, and the Korean government has identified the nucleic acid (NAT) tests required for the Hawai'i pre-test program. She said the Taiwanese government is crosschecking with hospitals and working with targeted pharmacy chains that specifically offer NAT tests. Ms. Herman said they had a good meeting with the Canadian government and identified that clinics and pharmacies provide COVID-19 tests like in the U.S. She noted that there are still no direct flights from these countries, but Hawai'i will be ready and will be contracted with clinics, hospitals, or pharmacies as the case may be. She added that travelers are currently able to fly to Hawai'i through a U.S. Mainland connecting flight.

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

7. Presentation by Jadie Goo, HTA Director of Marketing, Regarding COVID-19 Travel Insurance Updates and Who Offers This Insurance:

Mr. Kam recognized Jadie Goo, HTA Director of Marketing, to present on COVID-19 traveler insurance offered by different international markets. Ms. Goo reported that there is a wide range of offerings in the U.S. For example, Pleasant Holidays offers trip cancellation coverage for COVID-19. In Canada, three companies offer insurance plans that cover COVID-19 related illnesses outside of Canada, and WestJet offers COVID-19 coverage for all U.S. flights. She said all Japanese travelers are encouraged to purchase oversea travel insurance, which covers polymerase chain reaction (PCR) tests and hospitalizations. Ms. Goo noted that Korea is similar to Japan, and oversea travel insurance with medical coverage can be purchased for \$50 to \$70 U.S. dollars. She said Chinese airline carriers do not provide COVID-19 traveler insurance because business is back to normal in China, but individual travelers can purchase insurance through international plans. Ms. Goo added that like China, Taiwanese airlines do not offer insurance coverage, but that Taiwanese travelers can purchase insurance through international plans.

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



8. 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:

Mr. Kam recognized Susan Webb of Hawai'i Tourism Canada to provide an update for the Canadian market. Ms. Webb reported that major markets like British Columbia are keeping their infection numbers low. She noted that there was a surge in the last few weeks due to Canadian Thanksgiving. She said that going forward, it is important for DOH and AGO to approve a pre-test program for Canada. Ms. Webb explained that testing in Canadian labs, clinics, and hospitals is on par with what is needed for Hawai'i approval. She noted that the Canadian national and provincial governments are involved with approving all testing. Ms. Webb said there are meetings with DOH and AGO and the counsel general's office in San Francisco to discuss the next steps moving forward. She noted that Air Canada and WestJet are excited to have flights returning to Hawai'i. She added that the airline carriers are identifying the labs they would like approved with AGO.

Ms. Webb reported that Air Canada is resuming flights to Hawai'i on December 1st and is working with Cleveland Clinic for its safety protocol. She noted that Air Canada is hoping to have COVID-19 free flights with pre-departure rapid testing. She added that Air Canada offers complimentary insurance for COVID-19 related illnesses.

Ms. Webb reported that WestJet currently flies to three U.S. cities and intends to return to Hawai'i in December. She noted that WestJet is working with the University of British Columbia on pre-flight testing.

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

9. 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:

Mr. Kam recognized Eric Takahata of HTJ to provide an update for the Japan market. Mr. Takahata reported that the state is in constant discussion with the Japanese government and is working on removing the 14-day quarantine for Japanese travelers returning to Japan. He noted that a recent survey showed that 45.4% of respondents said that Hawai'i is the first international destination they would travel to. He added that compared to 2019, traveler



volume is down 82% in 2020 and forecasted to be down 60% in 2021. Mr. Takahata said the Honolulu Marathon has been canceled, and Hawai'i will not see a large influx of Japanese travelers in November and December.

Mr. Takahata reported that for the remainder of 2020, there are four flights with ANA, nine flights with Hawaiian Airlines, and ten flights with JAL. He noted that the airline pre-test program has been approved with twenty-one trusted testing partners. He added that the negative test result forms have been standardized.

Mr. Takahata said the Japanese market will understand and comply with the mask wearing mandate. He added that the mālama messaging has been released in Japan.

Ms. Kimura asked if the airlines can provide testing pre-departure. Mr. Takahata responded that they have started to look for trusted testing partners to contract with, which needs to be vetted with DOH.

Mr. Kam invited the public to provide testimony, and there was a question. Daryl Huff asked if airlines would be willing to help passengers by putting them on later flights if their test results are delayed. Mr. Takahata responded that he has not received airline policies for that.

10. 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 Restaurants 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, (l) Earned Media Update:

Mr. Kam recognized John Monahan and Jay Talwar of HVCB to present on COVID-19 information resources and a marketing plan update. Mr. Monahan reported that general questions can be directed to the DOH website, www.hawaiiicovid19.com, which includes the most up-to-date information coming from the people making the decisions. He said HVCB is working closely with DOH, restaurants, hotels, and activity industries to provide up-to-date information on HVCB's website, www.gohawaii.com.

Mr. Talwar discussed how this information is being shared with visitors. He reported that their airline partners have shared this information on websites, blog posts, social media, and email communications to travelers. Mr. Talwar noted that the safety protocol video is running at all airports. He added that hotels share this information in-room, throughout the property,



and in email confirmations. He said there has been news coverage on Good Morning America, local news, and Nā Leo TV. Mr. Talwar noted that the safety protocol video is being shared on social media and YouTube and with HVCB's members and travel partners.

Mr. Talwar then reported that the Mālama Hawai'i Program landing page is launching on November 2nd with links to partners and participants, and the social media and public relations campaign will deploy on November 9th.

Mr. Atkins asked if there have been discussions about mandate exceptions for smaller attractions so that they can operate for a profit. Mr. Monahan responded that he does not have any information on that. He added that everyone is trying to determine what the magic number is and how the regulations allow for maximization based on volume.

Ms. Menor-McNamara asked if county-specific guidelines are communicated to visitors. Mr. Monahan responded that HVCB compiles the major guidelines, but not the county-specific nuances. Ms. Menor-McNamara said the Chamber of Commerce has developed a one or two page sheet for each county and offered to provide it to HVCB.

Ms. Kimura said travelers are still having issues with pre-testing and cannot get their results before their trip. Mr. Monahan responded that they are dealing with it every day in HVCB's call centers. He noted that the state is working through these issues and trying to improve the process.

Representative Richard Onishi asked Mr. Talwar to explain the disconnect between the communication of HVCB's airline and hotel partners and the lack of mask usage. Mr. Talwar responded that they are working with the hotel association and police department so that everyone is clear that these rules are in place and need to be enforced.

Mr. Kam invited the public to provide testimony, and there was a question. Elizabeth Churchill asked how HVCB is handling negative press such as the ABC story by Kaylee Hartung titled "Testing problems & limitations ruining trips to Hawaii for some?" Mr. Monahan responded that the traveler did not use an approved pre-testing partner. He noted that the reporter had a good experience and provided a good perspective and balanced story. He added that it was unfortunate that the traveler could not come to Hawai'i for not following procedures.

11. Adjournment:

The meeting adjourned at 12:39 p.m.

Respectfully submitted,



HAWAII TOURISM
AUTHORITY

Hawai'i Convention Center
1801 Kalākaua Avenue, Honolulu, Hawai'i 96815
kelepona tel 808 973 2255
kelepa'i fax 808 973 2253
kahua pa'a web hawaii tourism authority.org

David Y. Ige
Governor

John De Fries
President and Chief Executive Officer

Reyn S.P. Ono

Reyn S.P. Ono
Recorder

Agenda Item #4:

Update on Trusted Travel Partners for
Korea, Canada and Taiwan



GMT Update

-

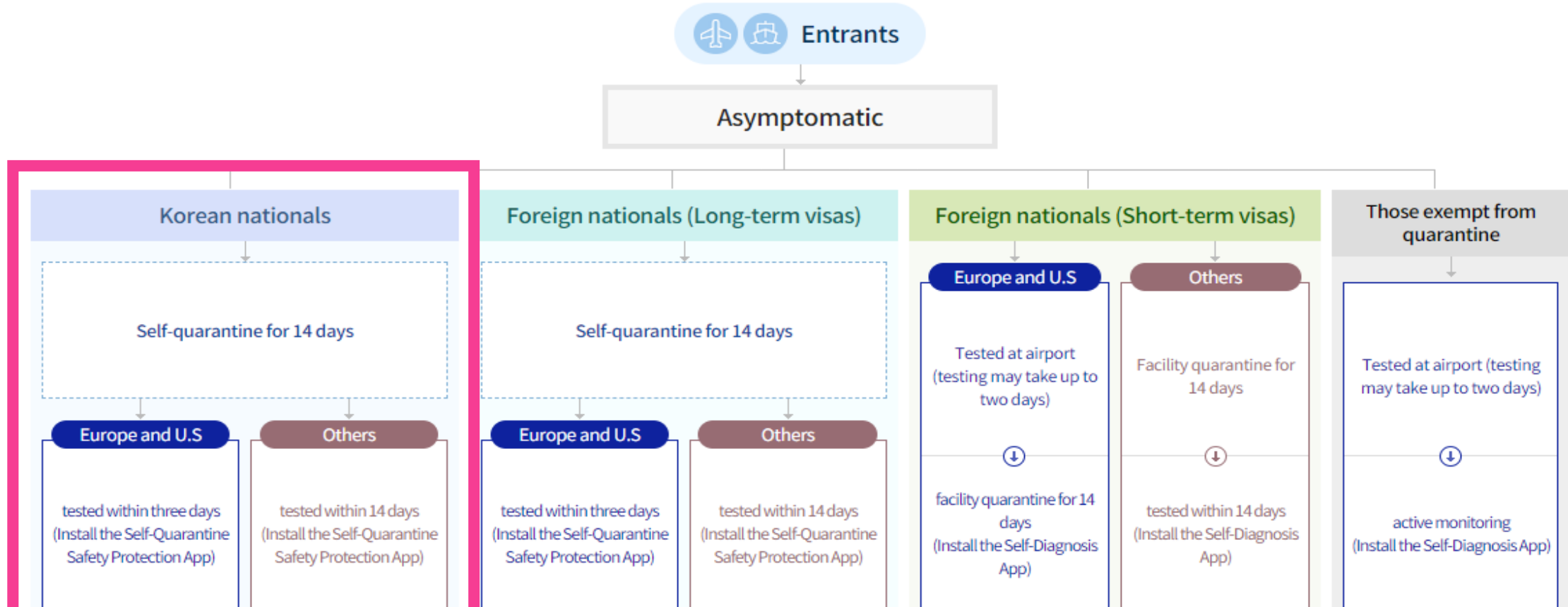
Trusted Testing & Travel Partners

11.18.2020

HAWAI'I TOURISM KOREA

Korea COVID-19 PCR Test & Quarantine Process

Regulation	Operation	Approval & Standards	PCR Test	Specimen
By Nation	Korea Disease Control and Prevention Agency	Ministry of Health and Welfare (MHW)	COVID-19 nucleic acid testing (real-time RT-PCR)	Upper respiratory tract sample - Combination of a nasal and throat swab



HAWAI'I TOURISM KOREA

Next Steps

Possible PCR Test Center at ICN (Terminal 2)

Rapid COVID-19 Test Center at ICN, allowing outbound travelers to get the test results in 30 mins (or within 2 hrs max)

- **Operation:** Incheon International Airport
- **Administration:** Korea Disease Control and Prevention Agency
- **Current status:** under discussion with Korean Government

Selecting Trusted Partners in Korea

Partnership with COVID-19 Test Centers in Korea

Pre-travel test program in Korea can start from allowing Korean travelers with negative test result from designated test centers with direct partnership with AG Office.

Collaboration with Korean Travel Industry

Collaboration with Airlines

- Korean Air suspends flight service to HNL till Dec. 31, 2020
- Asiana Airlines suspends flight service to HNL till Mar. 27, 2021
- Hawaiian Airlines will resume its flight to HNL from Nov. 27, 2020

HAWAI'I TOURISM CANADA

******Trusted partner approval through Canadian carriers:
anticipated announcement as early as this week******

Air Canada starting December	WestJet starting December
YVR-HNL	YVR-HNL
YVR-OGG	YVR-OGG
YYC-OGG	YYC-HNL
	YYC-OGG

➤ ***HTCAN, HTA and the carriers are working on a communications plan for the announcement***

HAWAI'I TOURISM CANADA

Rapid Testing at Airports (NAAT/PCR)

- **Calgary (YYC) Airport** – November 2nd rapid testing for all arriving passengers reducing isolation from 14 to 5 days
- **Vancouver (YVR) Airport** – WestJet testing pilot project – excellent results
- **Toronto (YYZ) Airport** – Working with Federal government to provide rapid testing for ALL arriving passengers and open to follow YYC; Current voluntary AC pilot project has great results – less than 1% positive testing after 5 days

HAWAI'I TOURISM TAIWAN

- TTP Kick-off meeting on 10/26 attended by HTA, HTT, DBEDT Taipei Office, DOH, DOD, AG Office, TECO, MHW, CI.
- TECO worked with MHW & MOFA and provided POCs for 3 selected hospital groups (10 branches/locations). 3 contracts to be executed with:
 - **Cathay General Hospitals** (3 branches) - intend to sign contract
 - **Mackay Memorial Hospitals** (3 branches) - intend to sign contract
 - **Chang Gung Memorial Hospitals** (4 branches) - intend to sign contract

HAWAI'I TOURISM TAIWAN

Airline Update

- **China Airlines:** no confirmed timing to resume TPE-HNL direct flights
- **EVA Air:** has the right to fly TPE-HNL route
- **Starlux Airlines:** just applied for the right to operate TPE-HNL route

Agenda Item #5:

Update on travel agent
booking pace

TRAVEL AGENCY BOOKING TRENDS

NOVEMBER 9, 2020

HAWAII TOURISM

AUTHORITY

Global Agency Pro

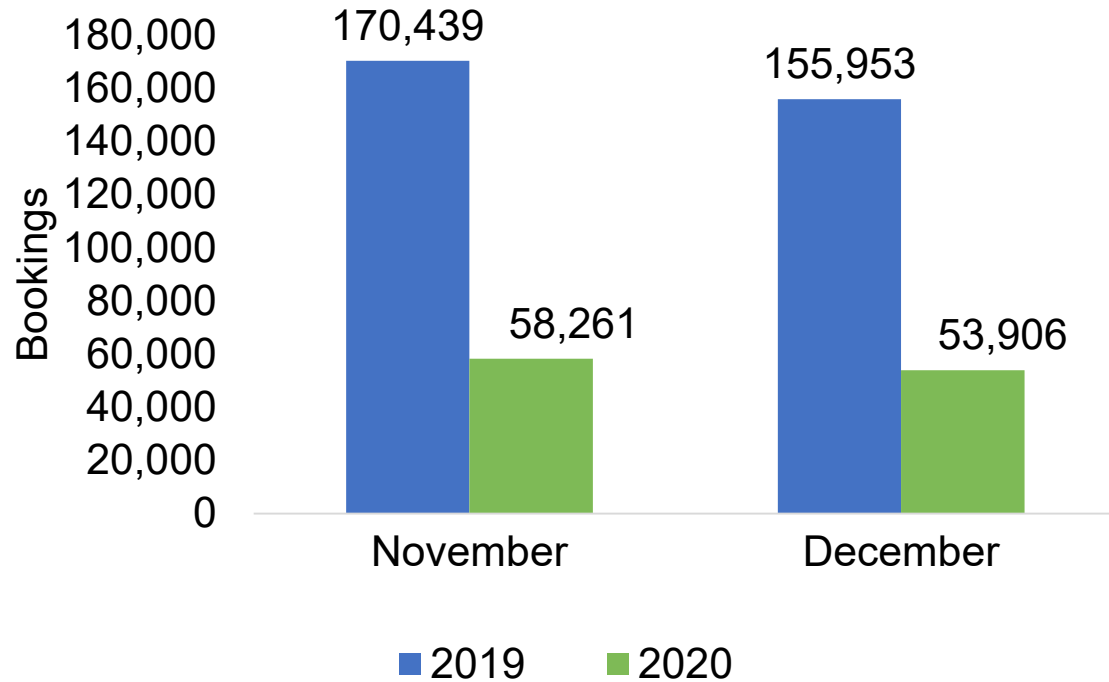
- HTA subscribes to Global Agency Pro, an online travel distribution system consisting of Travel Agency data
- Global Agency Pro provides access to over 90% of the world's Travel Agency airline transactions
- The database consists of five years of historical ticketing data and one year of advance purchase data
- The information is updated daily with a recency of two days prior to current date

Global Agency Pro Index

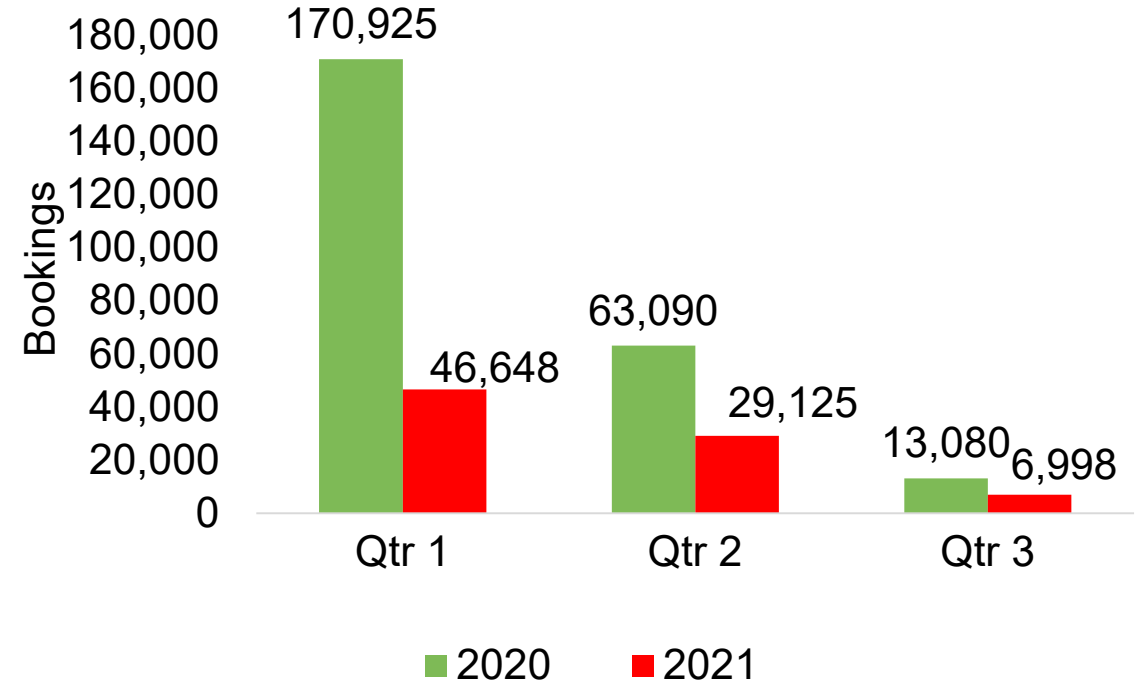
- **Bookings**
 - Net sum of the number of visitors (i.e., excluding Hawai'i residents and inter-island travelers) from Sales transactions counted, including Exchanges and Refunds.
 - Booking Date
 - The date on which the ticket was purchased by the passenger. Also known as the Sales Date
- **Travel Date**
 - The date on which travel is expected to take place.
- **Point of Origin Country**
 - The country which contains the airport at which the ticket started
- **Travel Agency**
 - Travel Agency associated with the ticket is doing business (DBA)

US

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



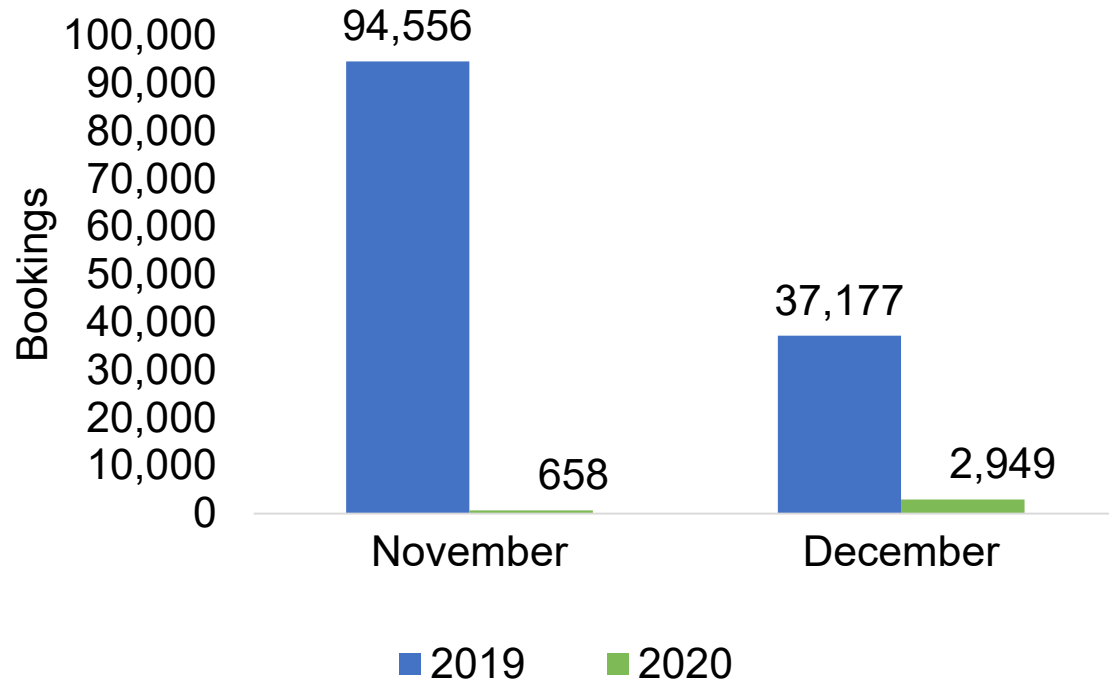
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 by Quarter



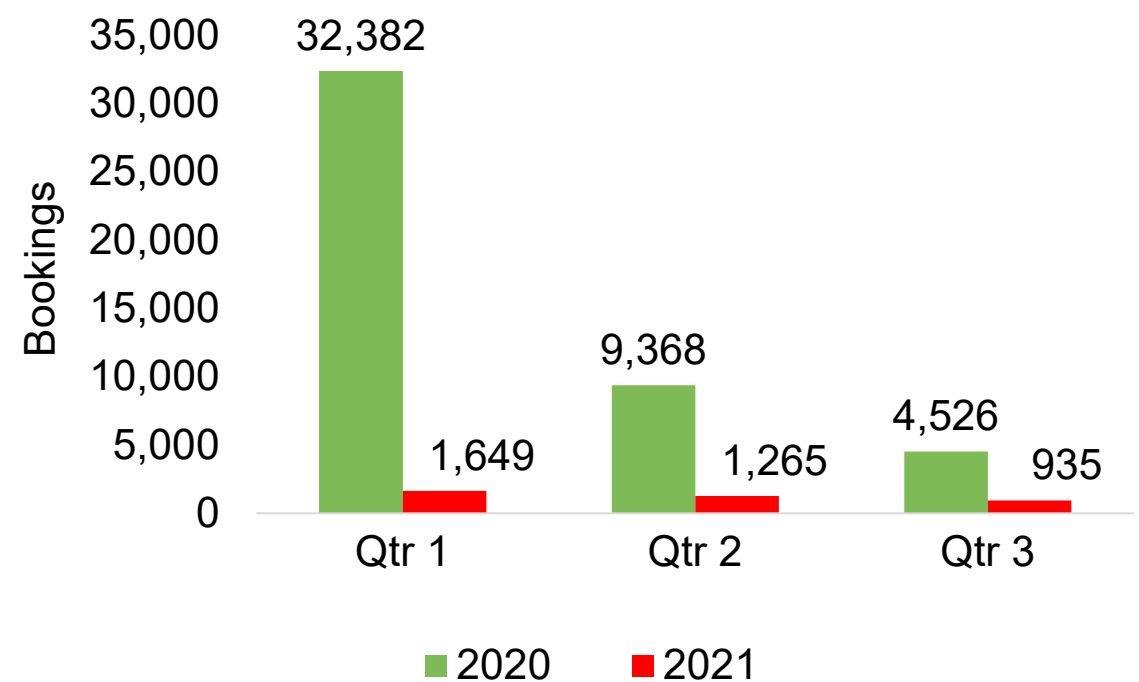
Source: Global Agency Pro as of 11/07/20

JAPAN

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



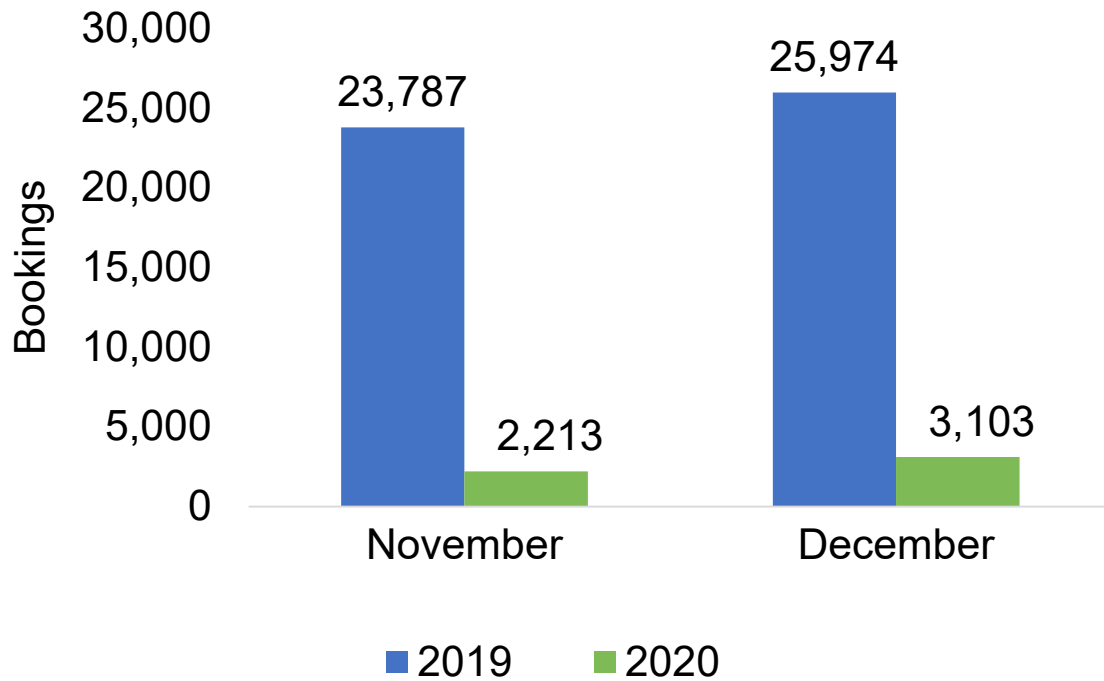
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 by Quarter



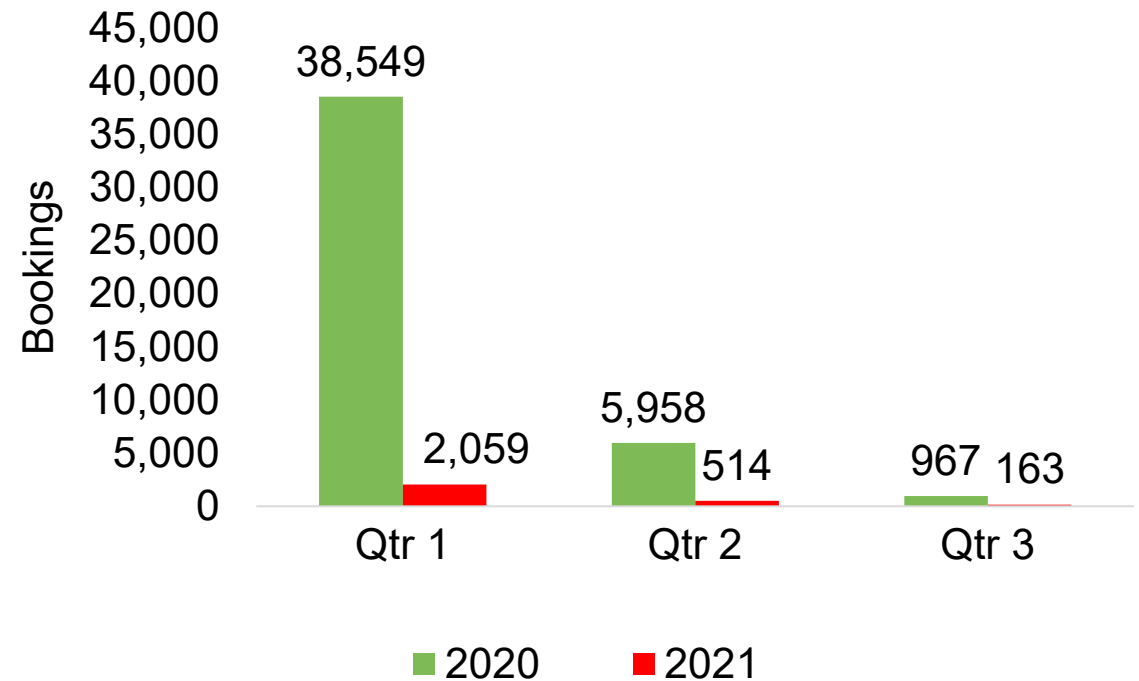
Source: Global Agency Pro as of 11/07/20

CANADA

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



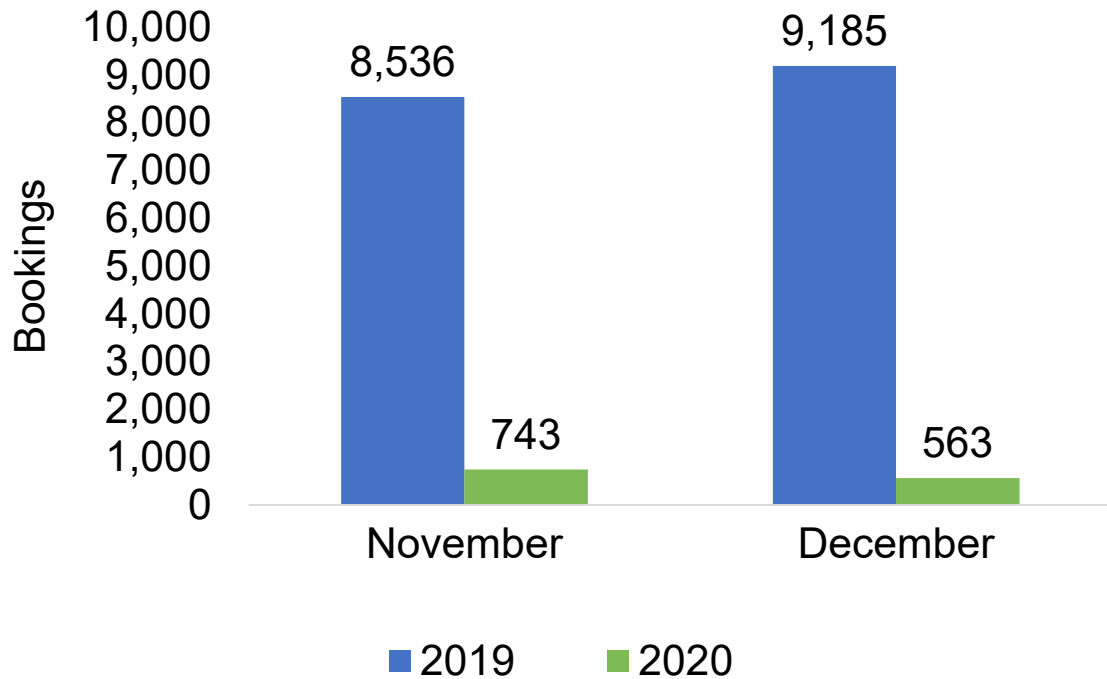
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 by Quarter



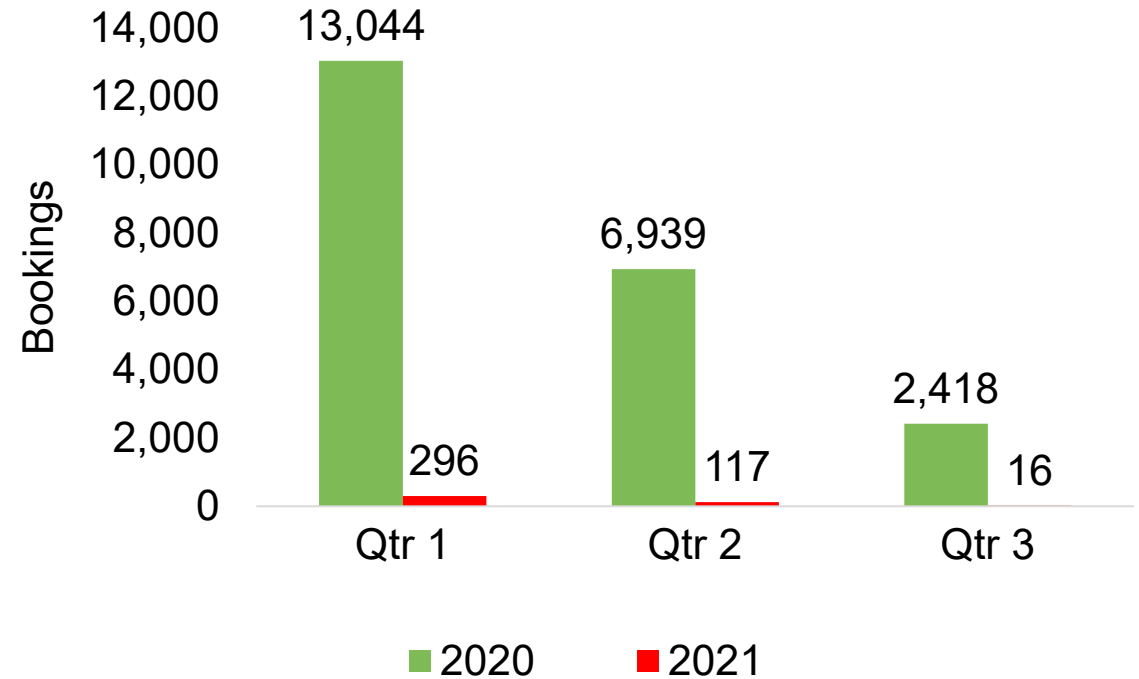
Source: Global Agency Pro as of 11/07/20

AUSTRALIA

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



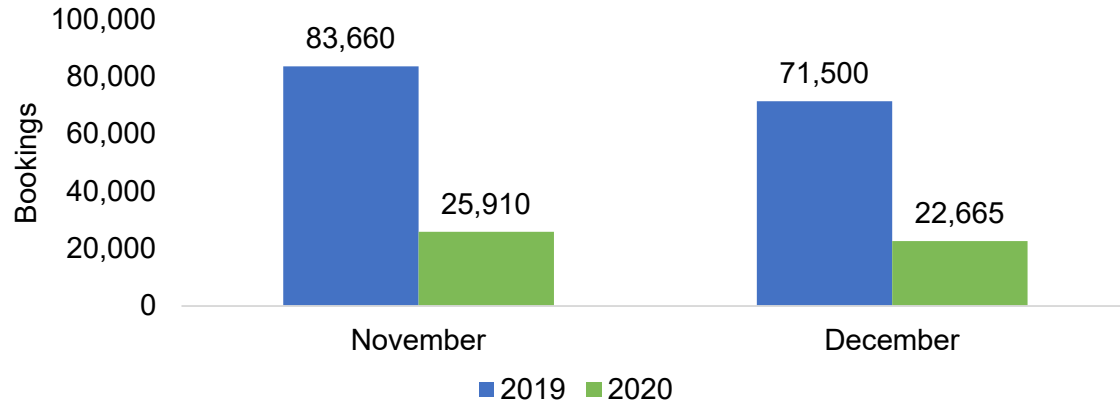
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 by Quarter



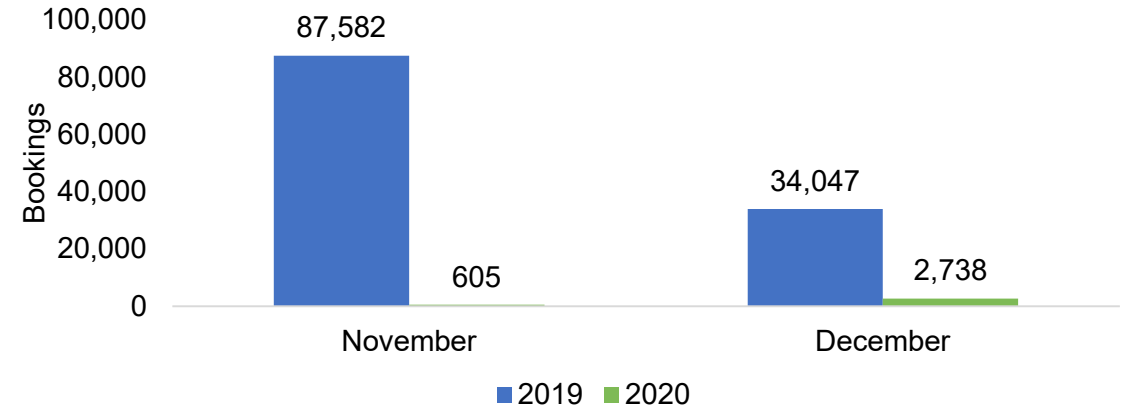
Source: Global Agency Pro as of 11/07/20

O'ahu by Month 2020

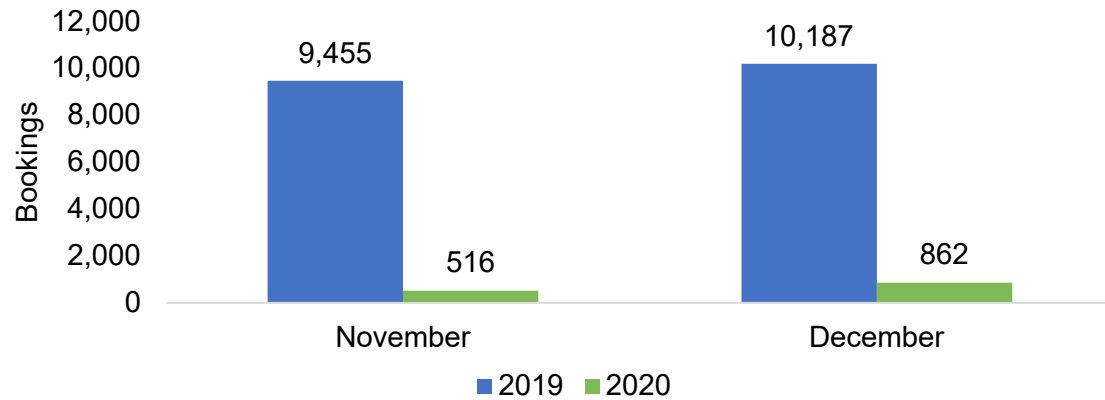
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.



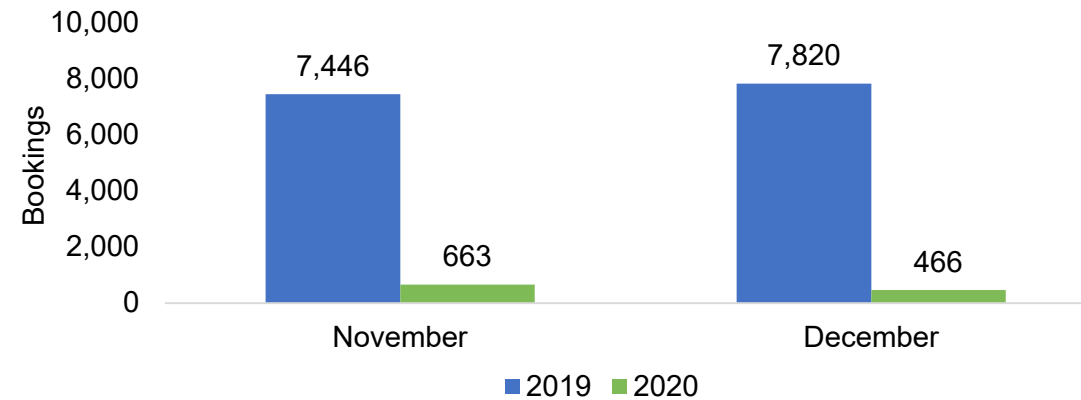
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan



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



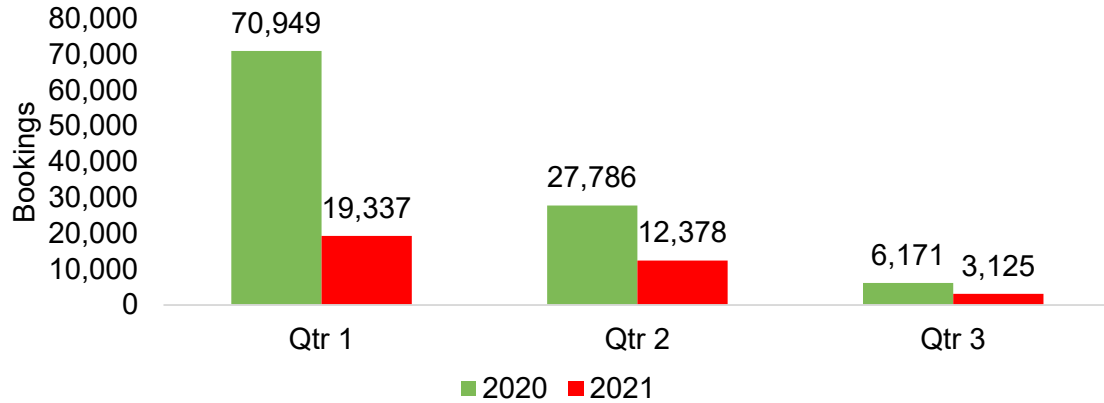
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia



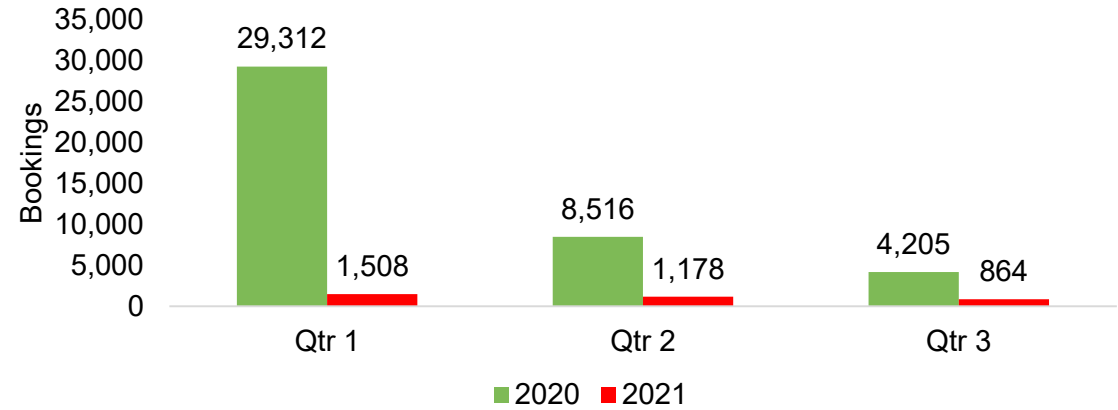
Source: Global Agency Pro as of 11/07/20

O'ahu by Quarter 2021

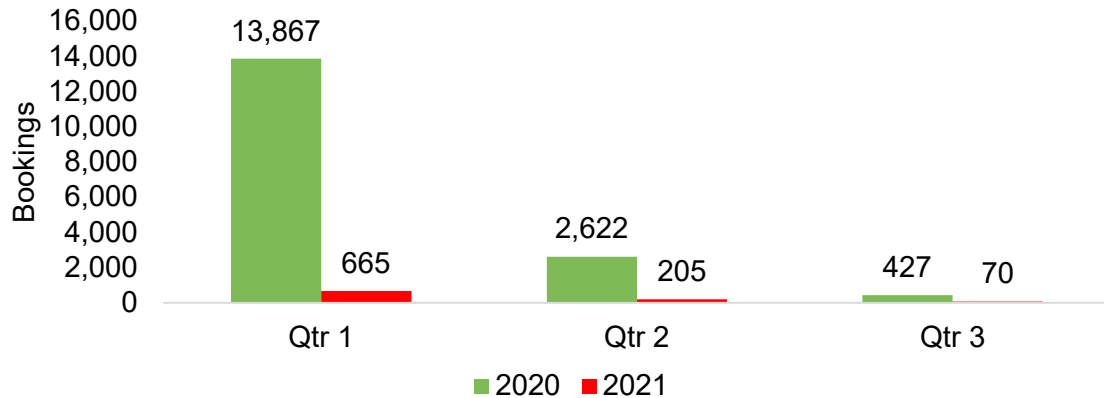
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



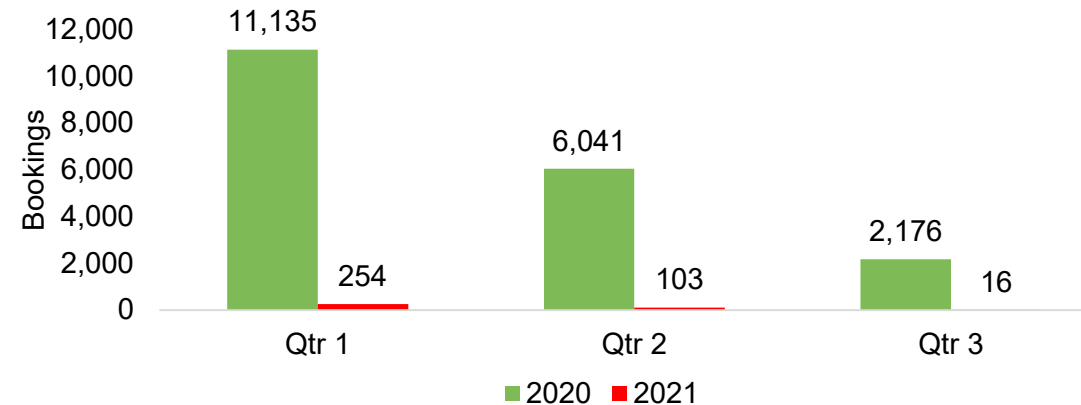
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Canada



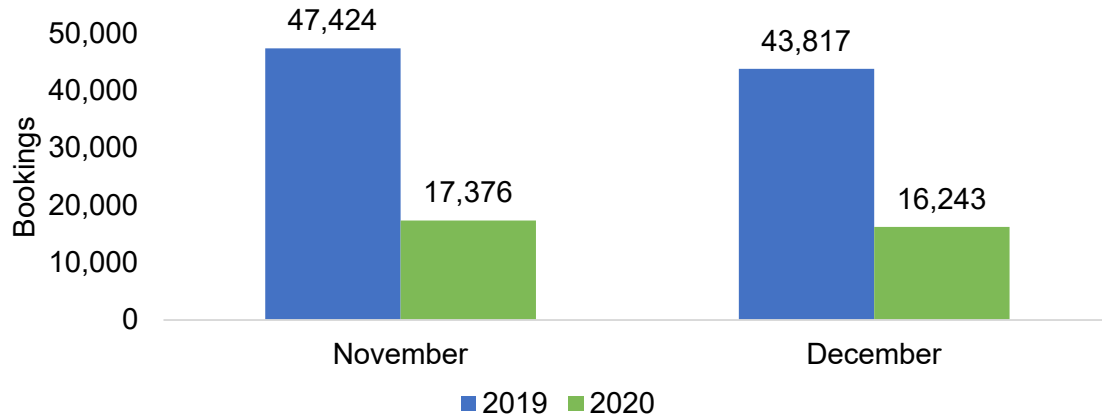
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



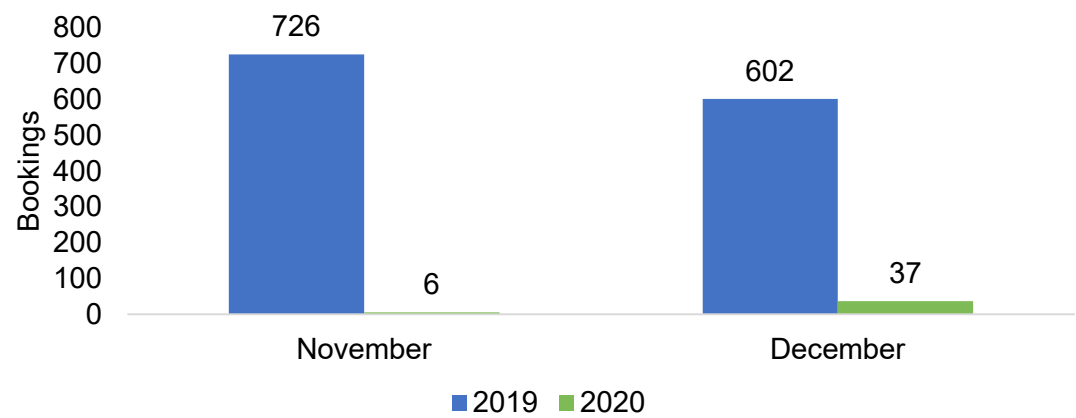
Source: Global Agency Pro as of 11/07/20

Maui by Month 2020

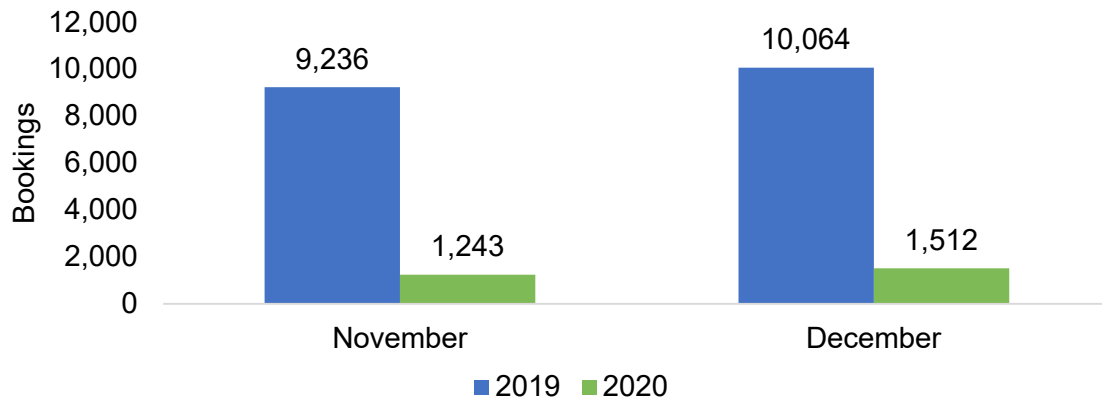
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.



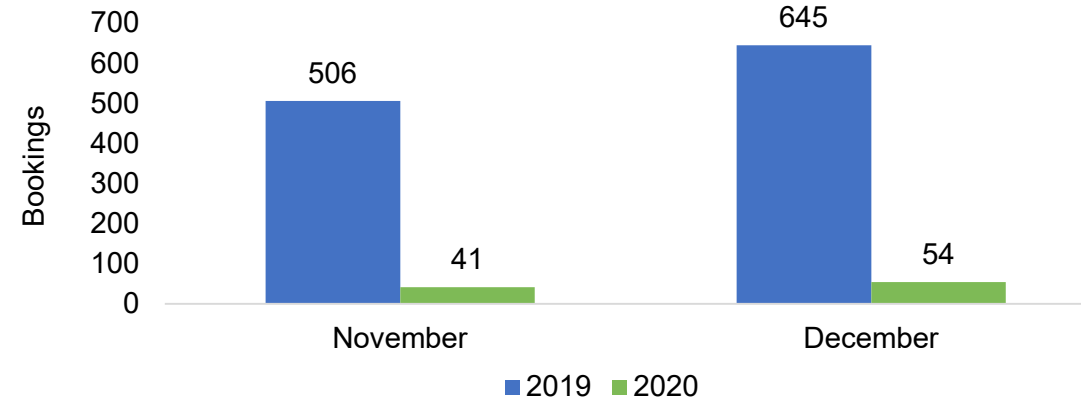
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan



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



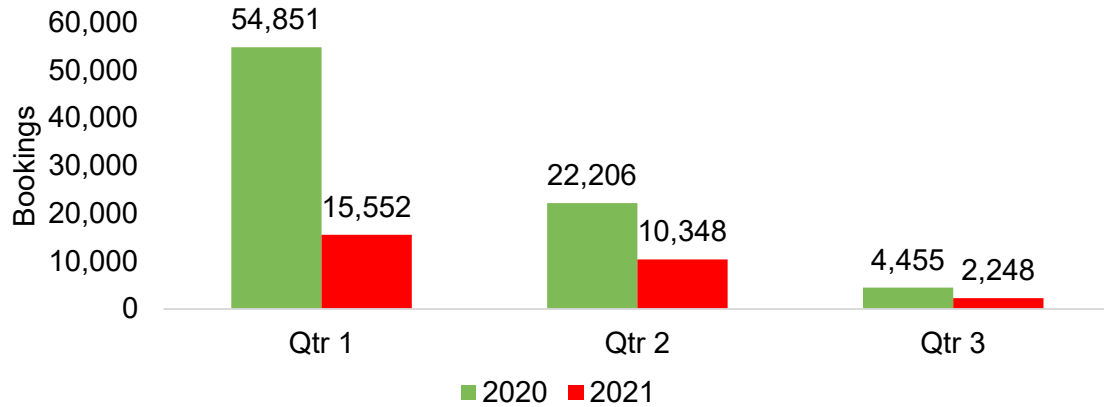
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia



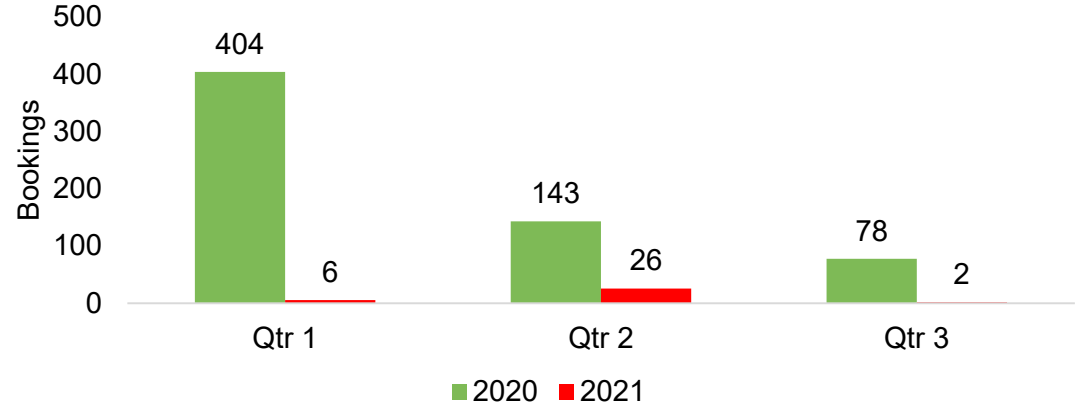
Source: Global Agency Pro as of 11/07/20

Maui by Quarter 2021

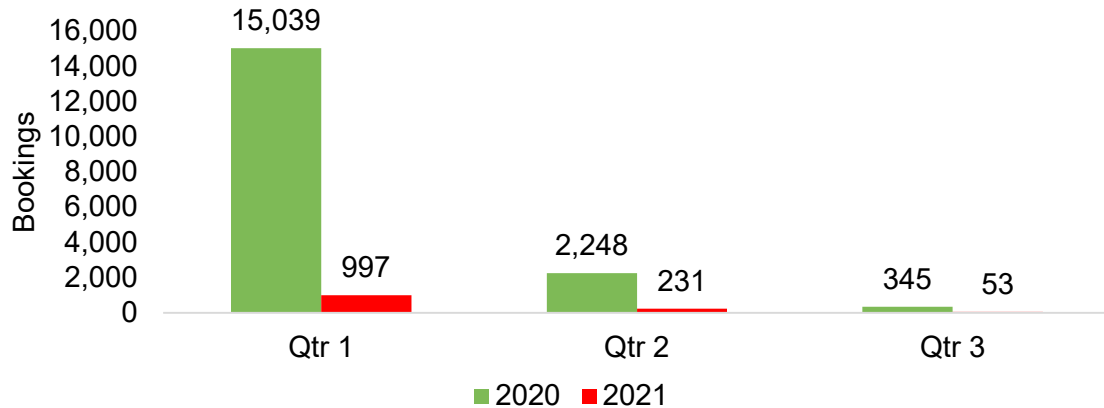
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



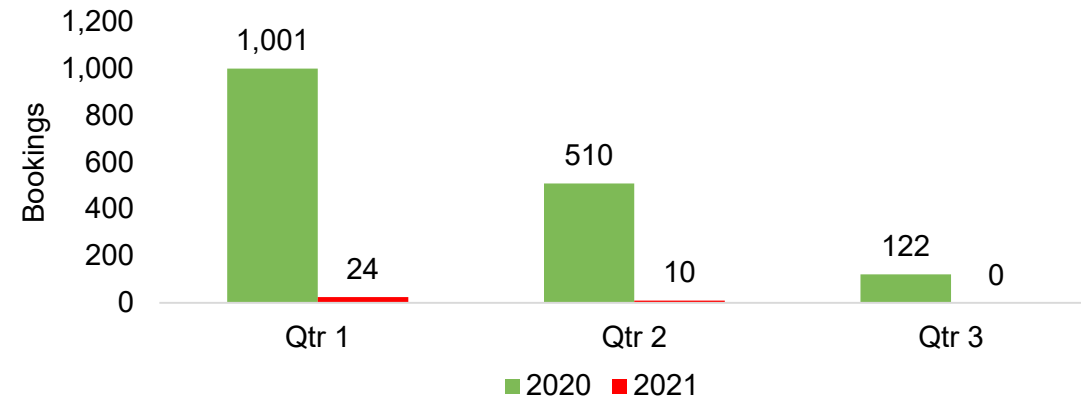
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Canada



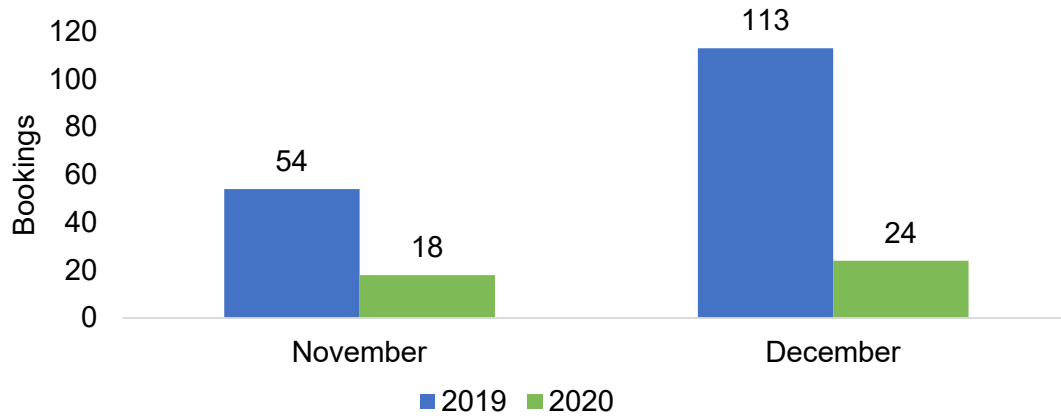
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



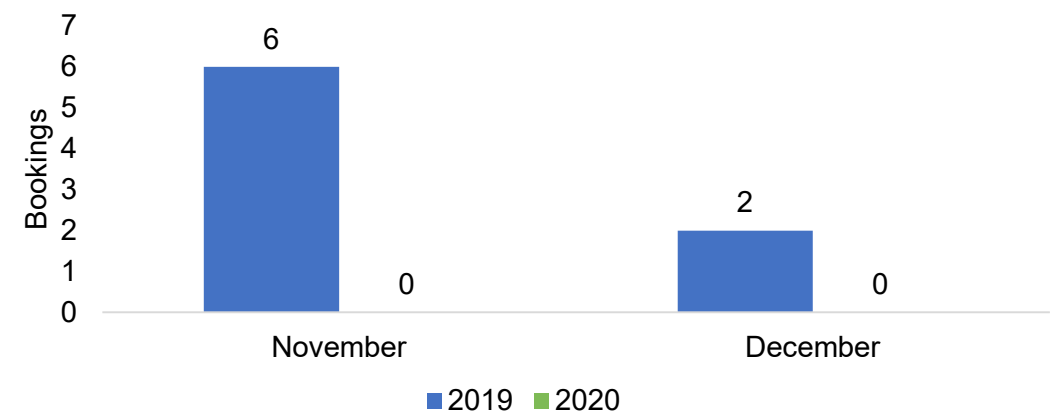
Source: Global Agency Pro as of 11/07/20

Moloka'i by Month 2020

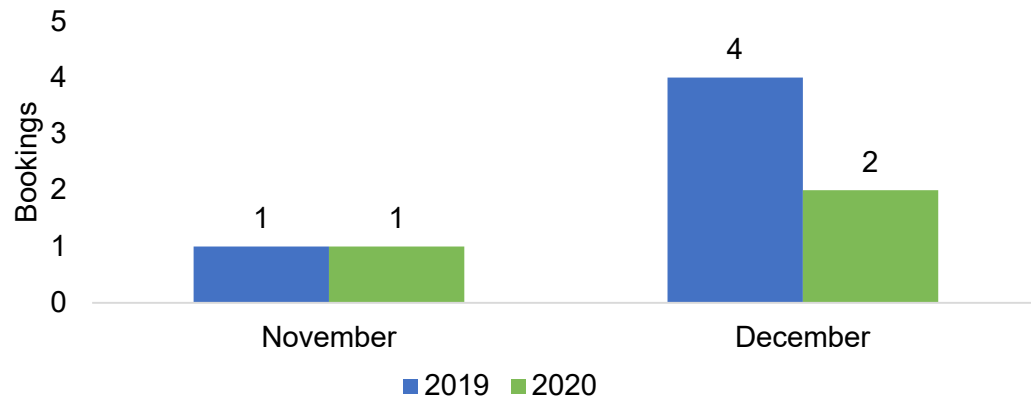
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.



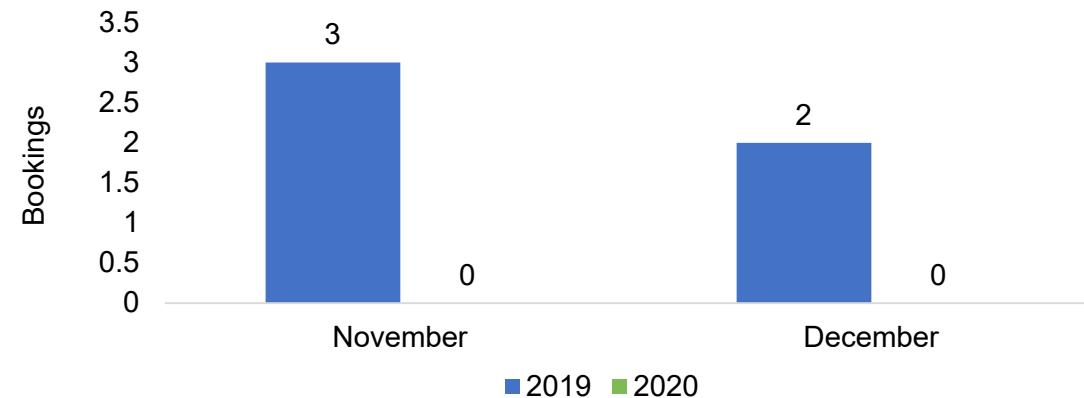
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan



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

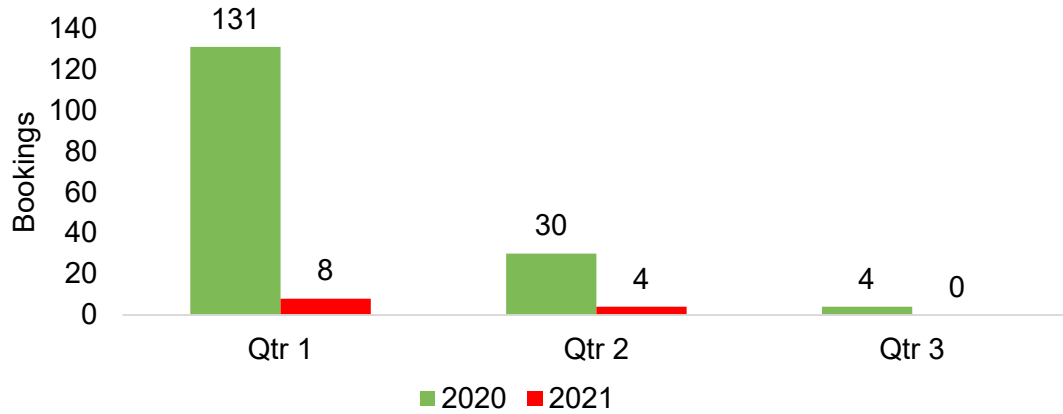


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia

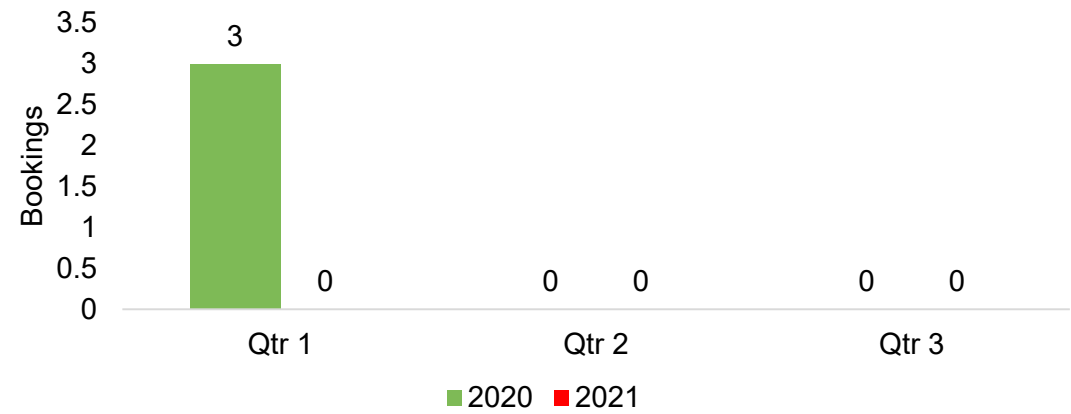


Moloka'i by Quarter 2021

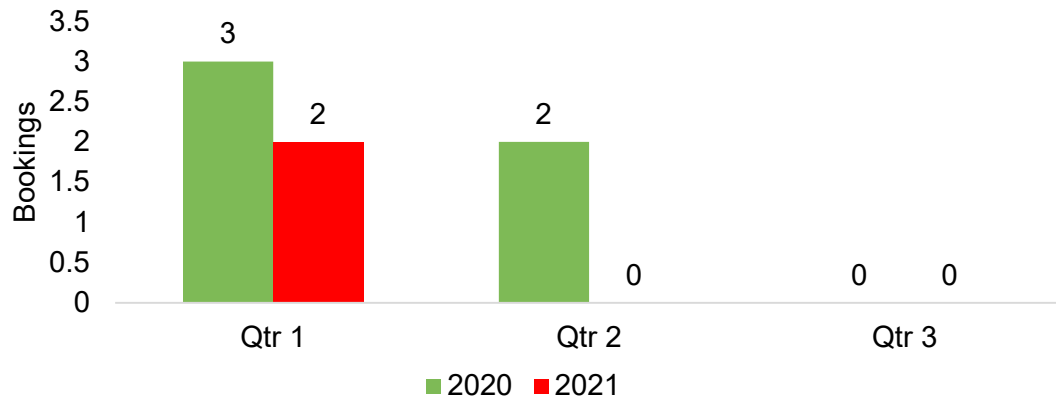
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



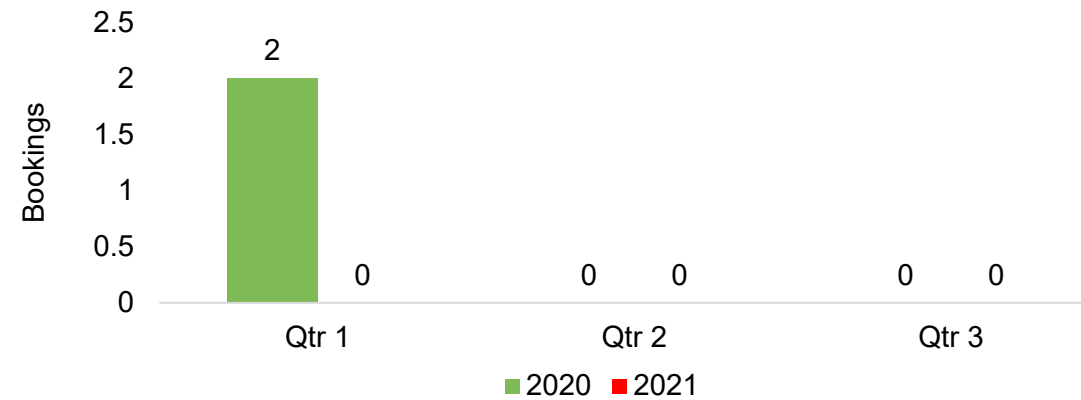
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Canada



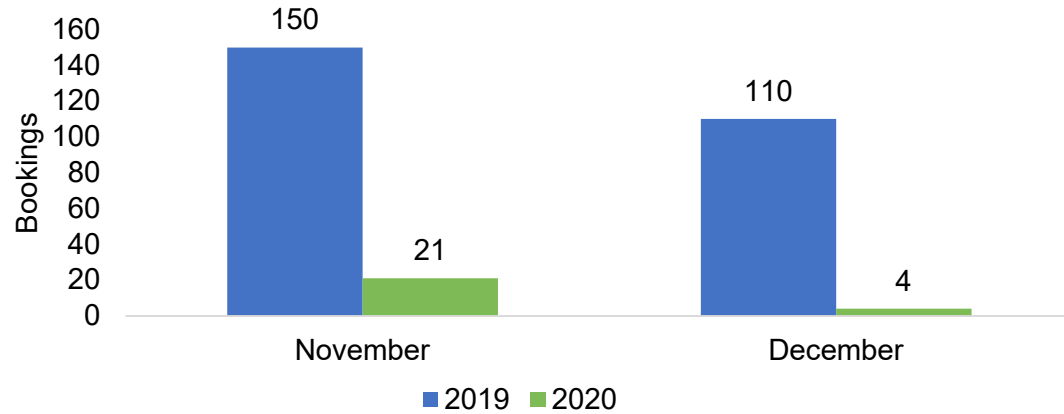
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



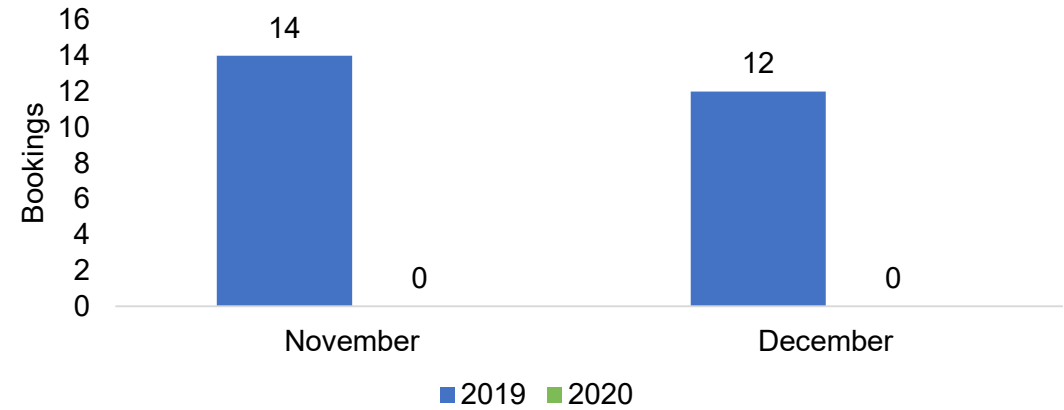
Source: Global Agency Pro as of 11/07/20

Lānaʻi by Month 2020

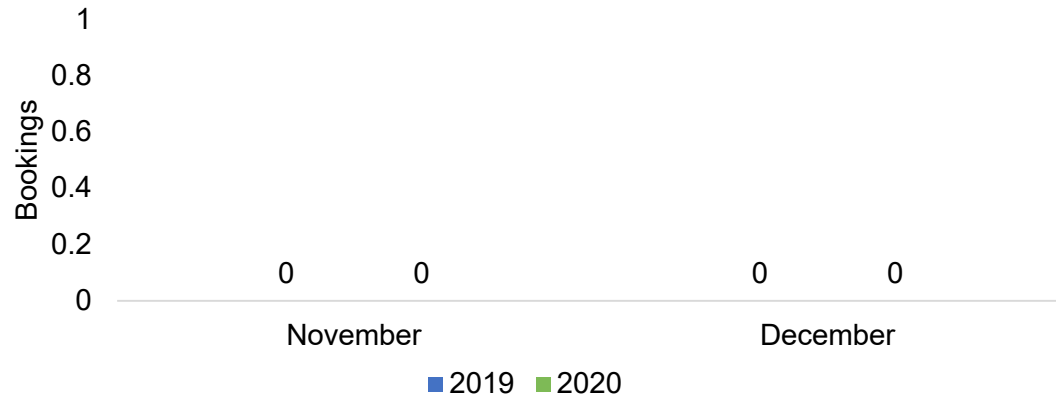
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.



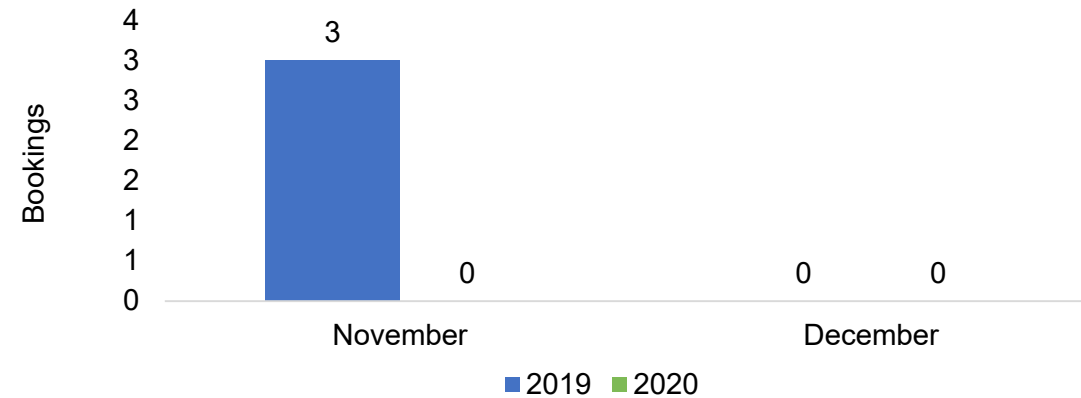
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan



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



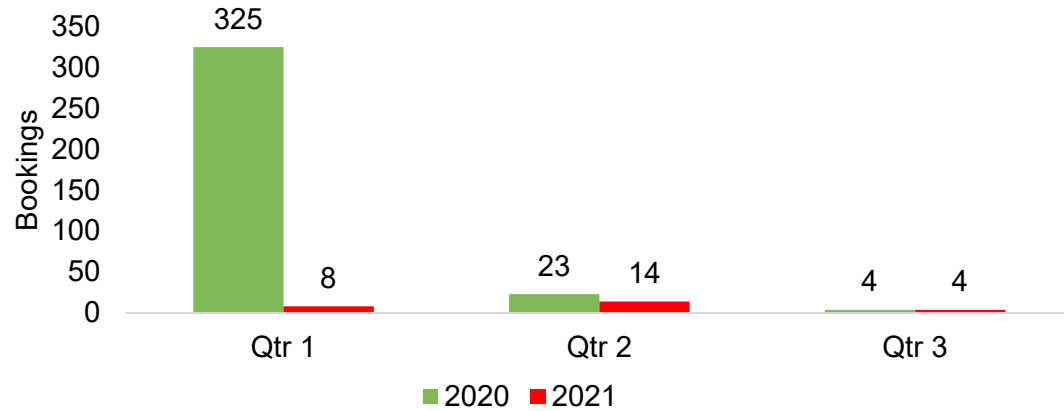
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia



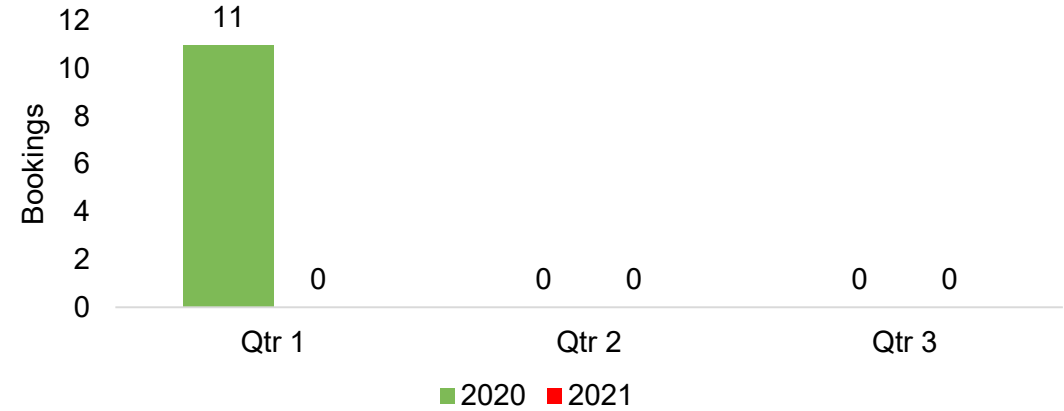
Source: Global Agency Pro as of 11/07/20

Lānaʻi by Quarter 2021

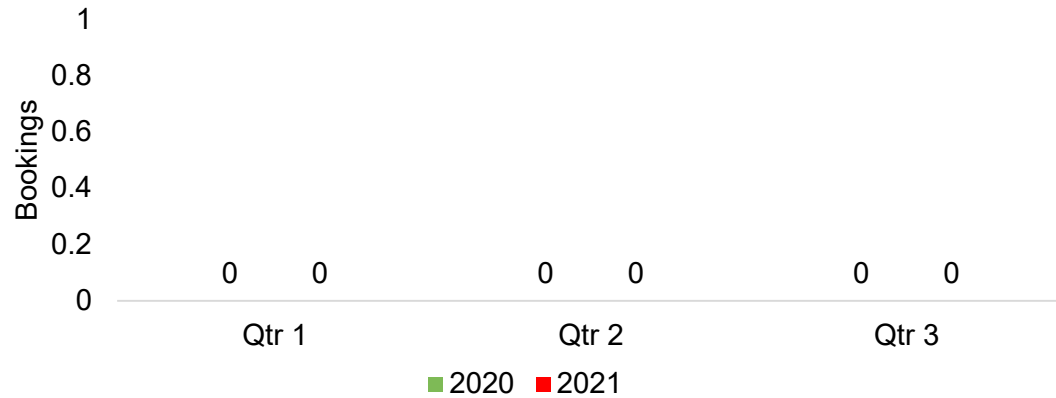
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



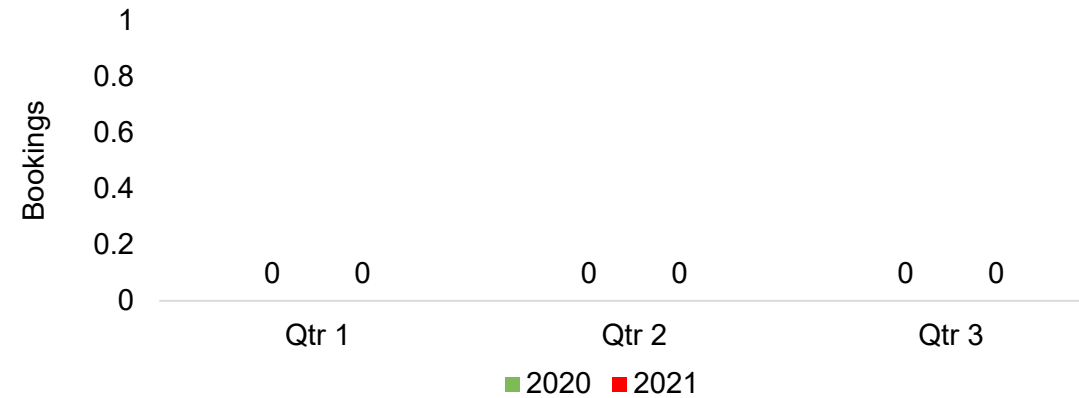
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Canada



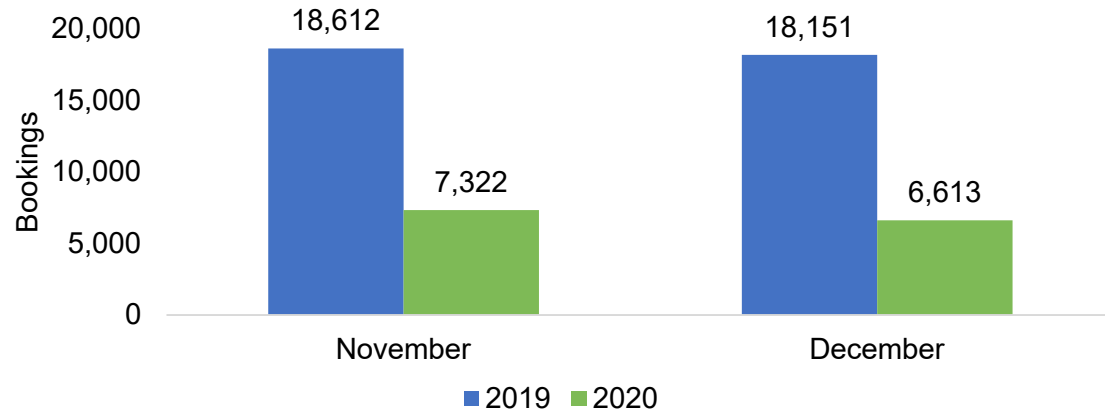
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



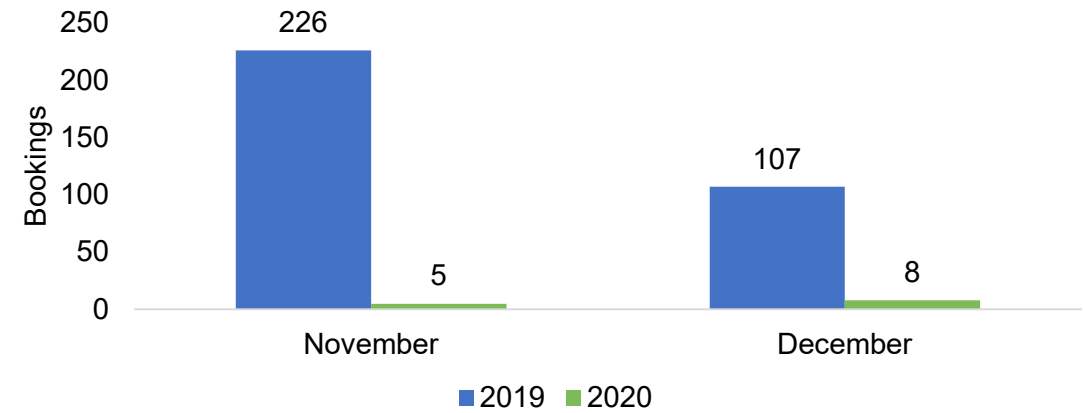
Source: Global Agency Pro as of 11/07/20

Kaua'i by Month 2020

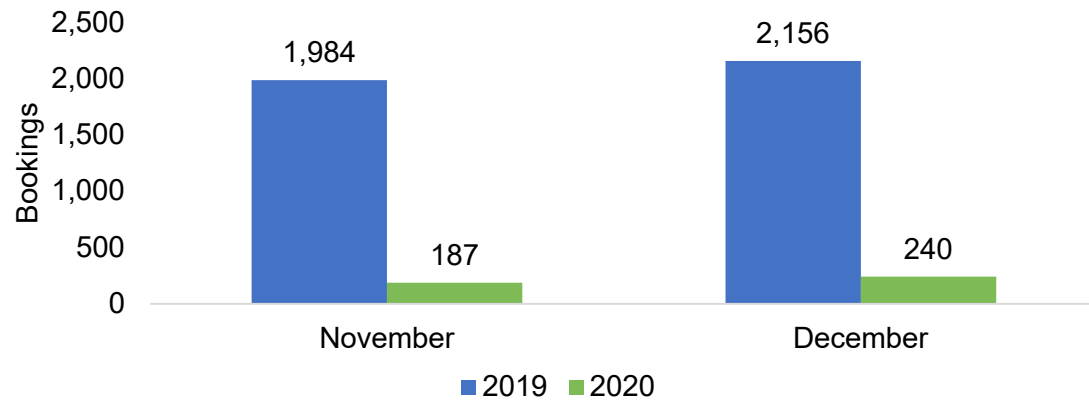
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.



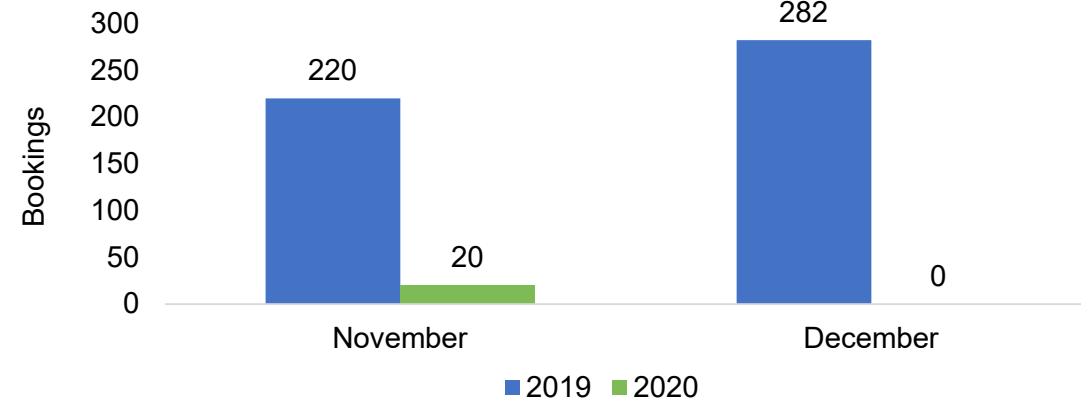
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan



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



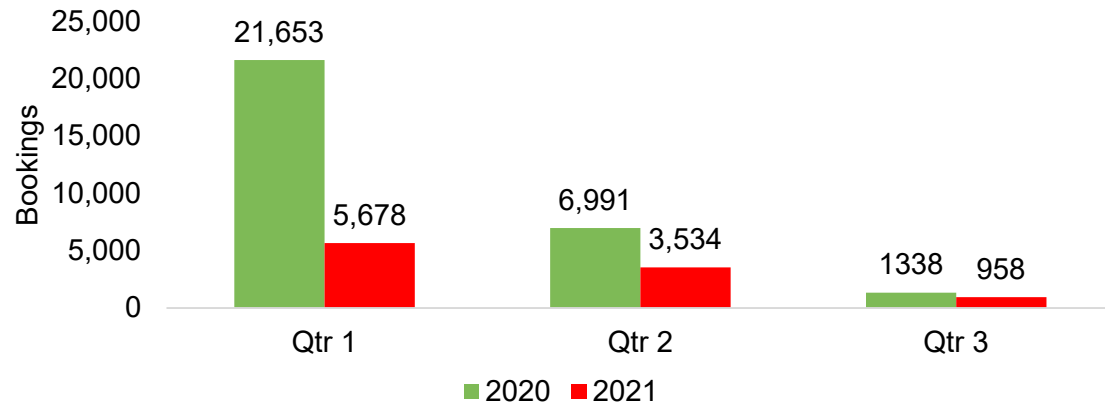
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia



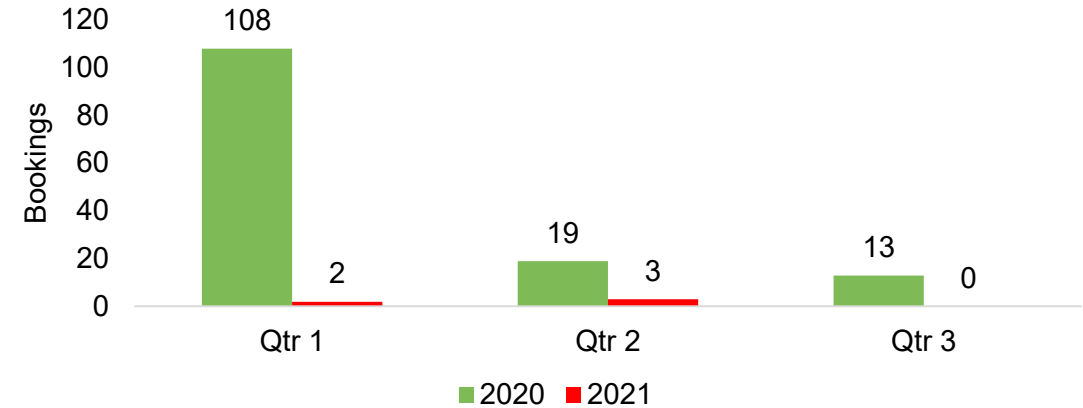
Source: Global Agency Pro as of 11/07/20

Kaua'i by Quarter 2021

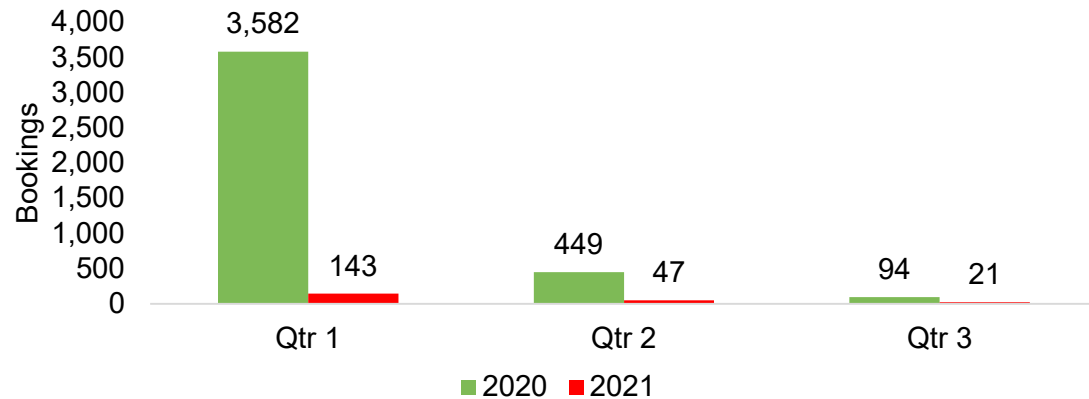
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



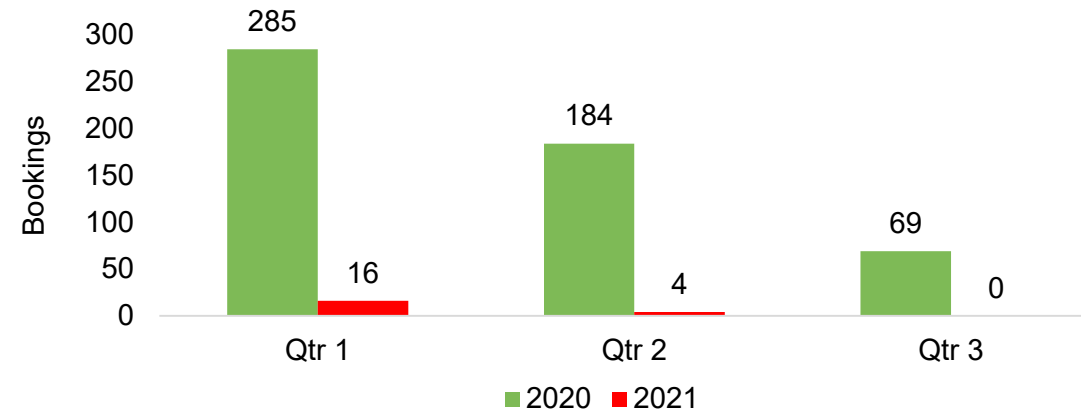
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Canada



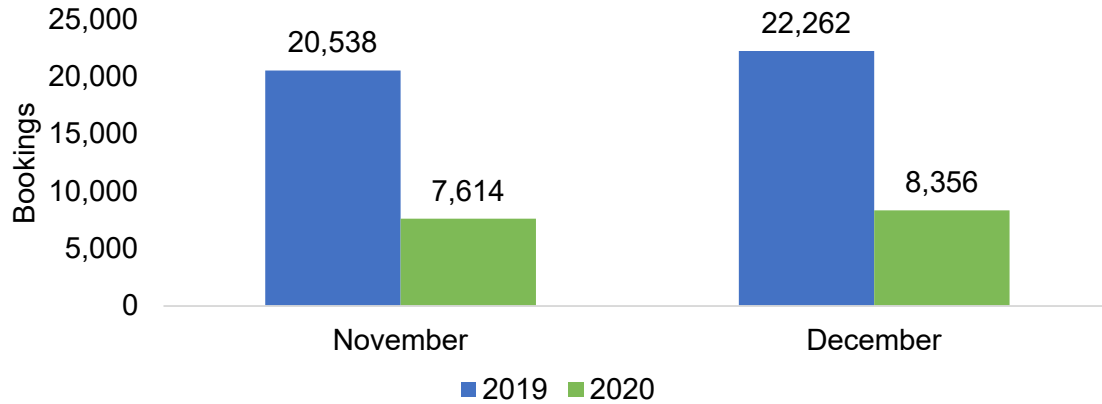
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



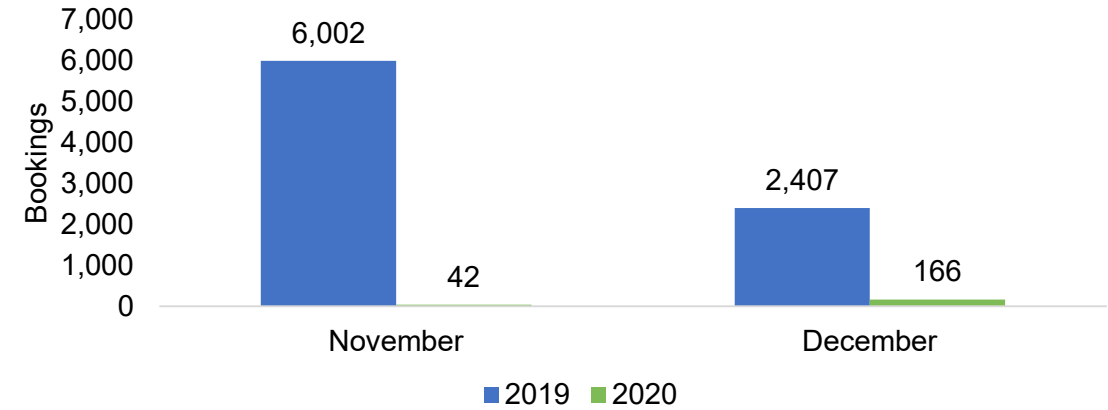
Source: Global Agency Pro as of 11/07/20

Hawai'i Island by Month 2020

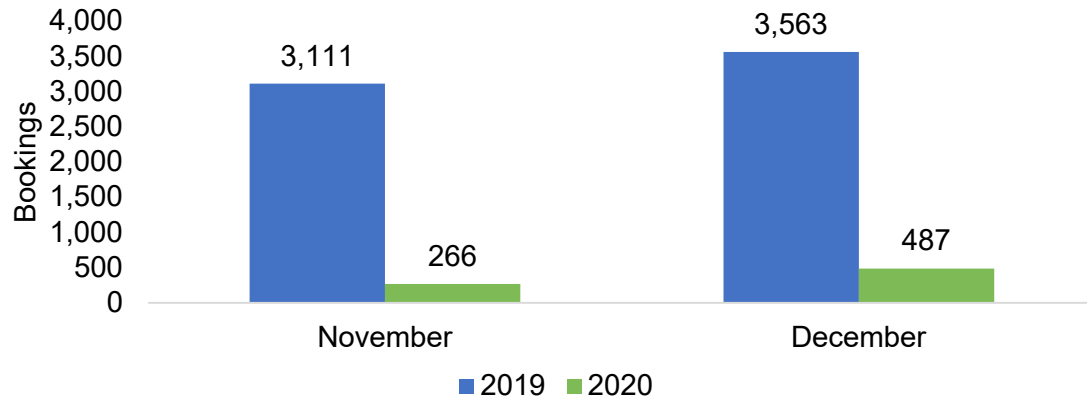
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.



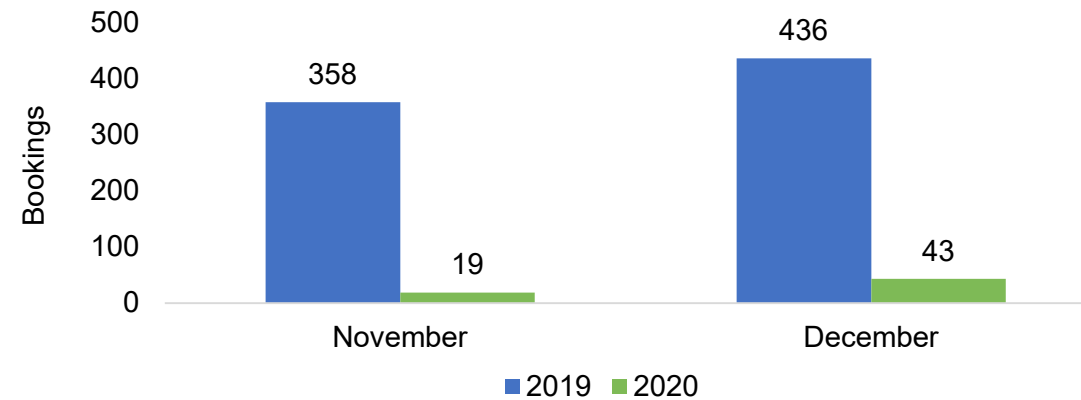
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan



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



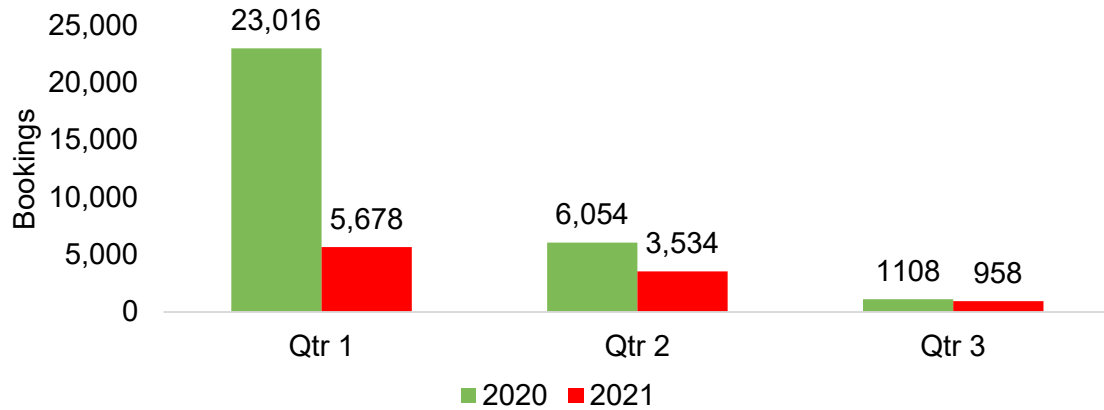
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia



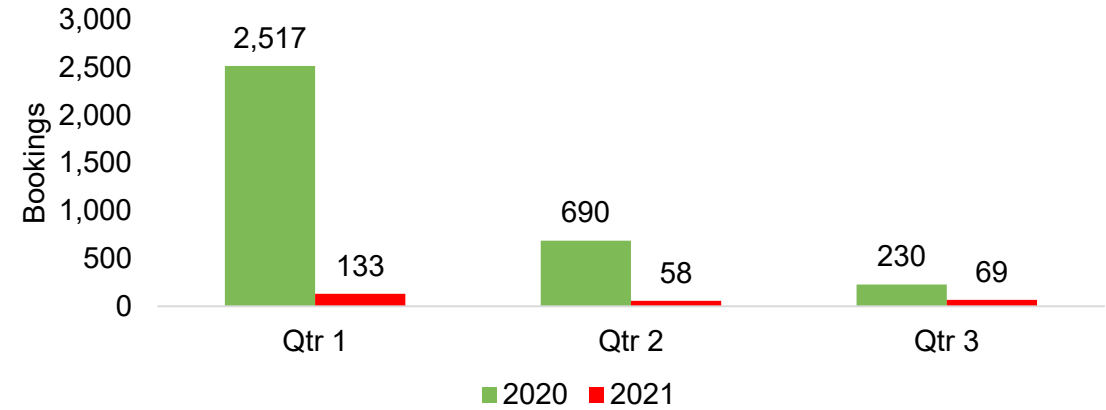
Source: Global Agency Pro as of 11/07/20

Hawai'i Island by Quarter 2021

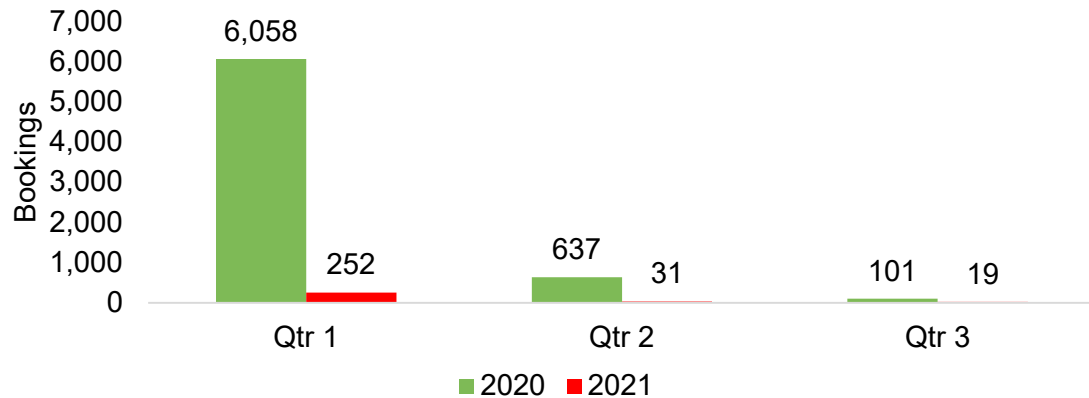
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



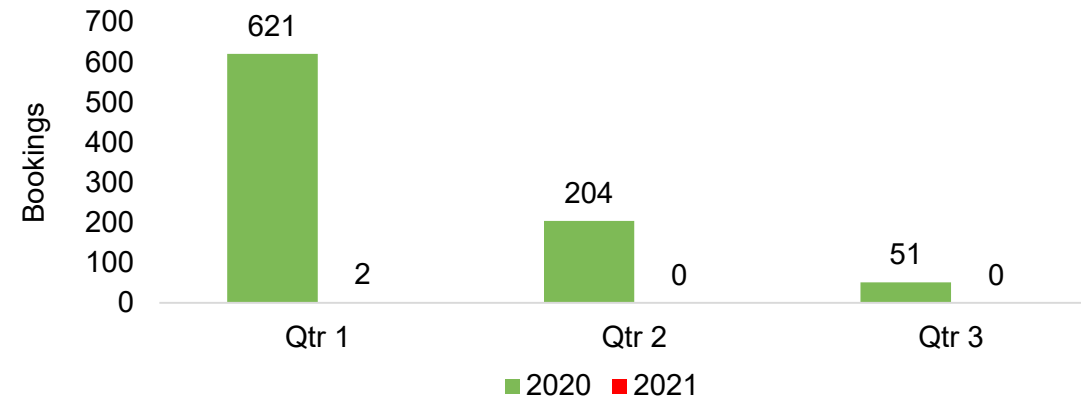
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Canada



Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



Source: Global Agency Pro as of 11/07/20

Agenda Item #6:

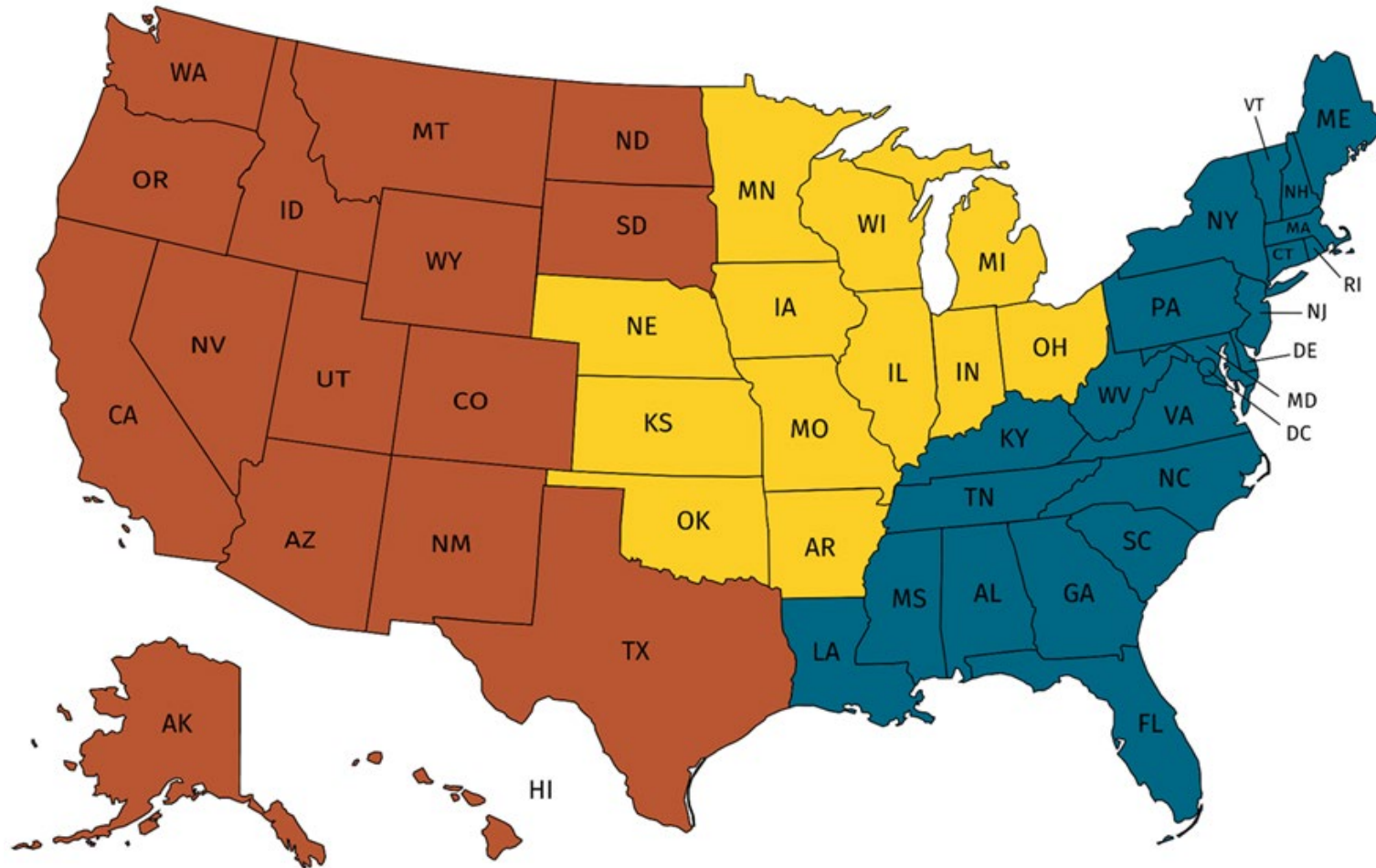
Update on group general trends,
cancellations and booking



MEET HAWAI'I UPDATE

November 18, 2020

MEET HAWAI'I TEAM OVERVIEW



Sales

Adele Tasaka
atasaka@hvcb.org

Kathy Dever
kdever@hvcb.org

Meredith Parkins
mparkins@hvcb.org

Sales & Services

Jessica Baysa
Sales Coordinator
jbaysa@hvcb.org

Josette Murai
Convention Services Manager
jmurai@hvcb.org

April Galapon
Sales Operations Manager
agalapon@hvcb.org

'Elele Program

Debbie Zimmerman
dzimmerman@meethawaii.com

SALES DIRECTION AND FOCUS

- Remain Nimble
- Mindset Change
 - 80/20 Focus
 - Business Rate MCI Universe of Accounts
 - Targeted Market Segments
- Sales Focus – 2023 and 2026 MCI Business
- Sales Time
 - In Front of Customers
 - Business Development
- Mālama Hawai'i

MĀLAMA HAWAI'I



MĀLAMA HAWAI'I

Our content and messaging framework will serve as a mindful travel guide inspiring MCI customers to take care of Hawai'i and themselves during their stay for a more enriching experience.

Mālama Hawai'i means inviting meeting attendees to:

Stay Open

From staying open to new experiences to enjoying wide open spaces, we'll bring soft adventures to life – shining a light on social distancing-friendly environments.

Stay Connected

Embrace moments that help visitors stay present and connected – to each other and to themselves. With an emphasis on romance, rejuvenation, and wellness, we'll provide a sense of calm that we could all use right now.

Stay Mindful


By getting to know the local culture and community, travelers will walk away with a deeper understanding – and why it's so important to Mālama Hawai'i

Stay Safe

Health and safety are top of mind as Hawai'i reopens. So when we welcome visitors back, we'll also keep them informed – with all the ways they can exercise caution as they explore the islands.

Stay Involved

We'll highlight all the ways visitors can give back during their visit. Everything from sustainable activities to voluntourism will be put in the spotlight, showing how they can make a positive impact on the Hawaiian Islands.

The background of the slide is a photograph of a rugged mountain range. The mountains are covered in lush green vegetation, with sharp, rocky peaks and deep, narrow valleys. The sky is a clear blue with some light, wispy clouds. The overall scene is one of natural beauty and wilderness.

The Hawai'i Tourism Authority, in partnership with a statewide alliance of Hawai'i-based hotels and volunteer organizations, are coming together with an initiative that encourages more responsible tourism by giving MCI decision makers an opportunity for an extended stay if they participate in a voluntourism activity during their stay on the islands.

The Mālama Hawai'i program not only will help us protect and preserve Hawai'i for the future but will give meeting attendees a more meaningful and enriching travel experience, inspiring them to participate in more purposeful activities during their trip and future stays in Hawai'i.

PROGRAMMING

MĀLAMA HAWAII 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.



SAFE TRAVELS ISLANDS EXPERIENCES **The HAWAIIAN ISLANDS** CULTURE PLANNING LANGUAGES

Giving Back on Vacation

Malama Loko Ea Foundation
Explore more about the Hololea Visitor Tour Program today!

Maui Nui Botanical Gardens
Learn more about Voluntourism opportunities.

Pohaha I Ka Lani
Find out more about Pohaha Ka Lani vacation volunteer programs!

Pacific Whale Foundation
Learn more about the Volunteers on Vacation program!

Sustainable Coastlines Hawaii
Learn More about Sustainable Coastline's Clean-up events!

Hawaii Forest Institute
Contact them at 808-933-9411 to find out about upcoming volunteer events!

PROGRAMMING

CSR MCI Programs

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

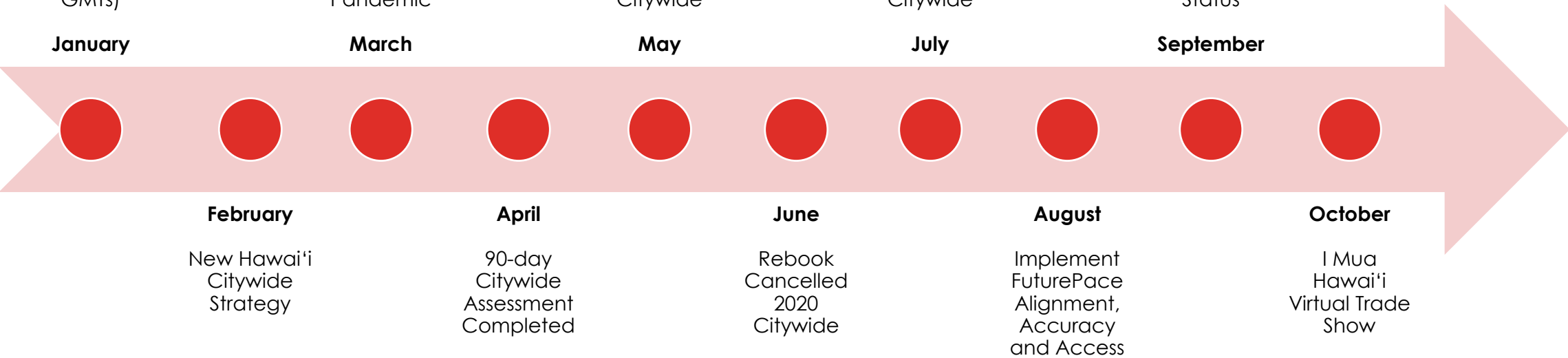


**ULUHA'O
O HUALALAI**

2020 KEY MILESTONES

HVCB responsible for Global MCI (Citywide, Single Property and International GMTs)

Continue Single Property lead opportunities, rebook and tentative conversion sales efforts.

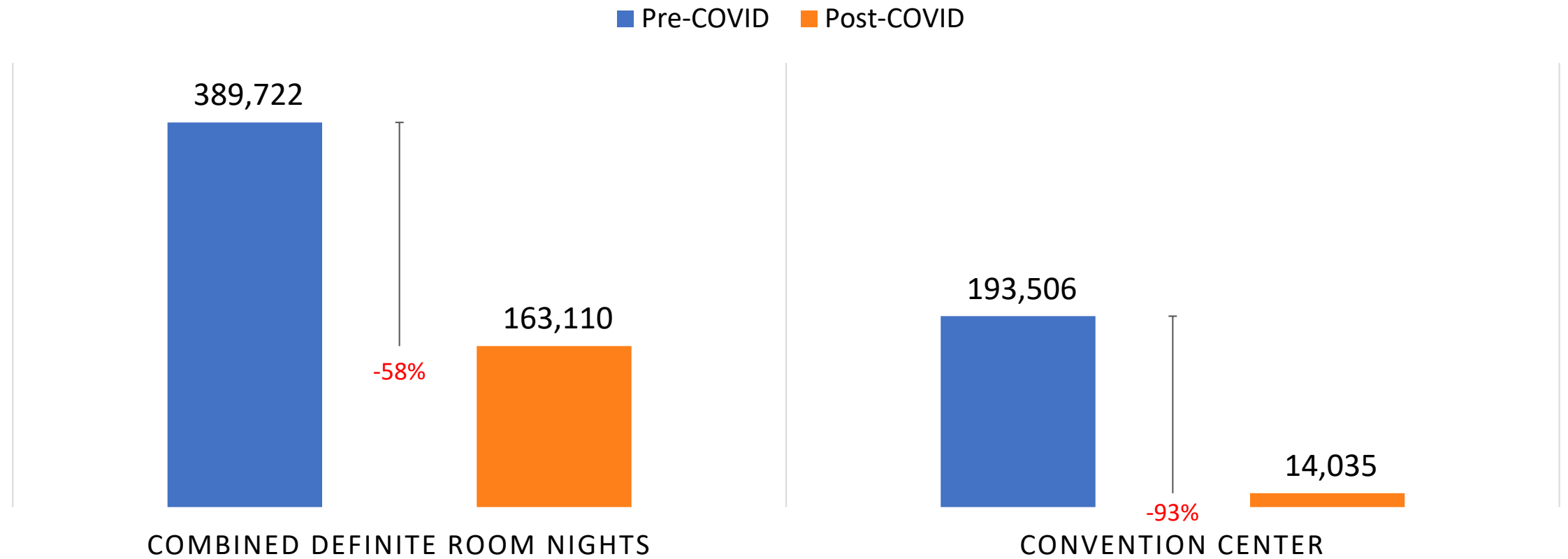


FUTUREPACE

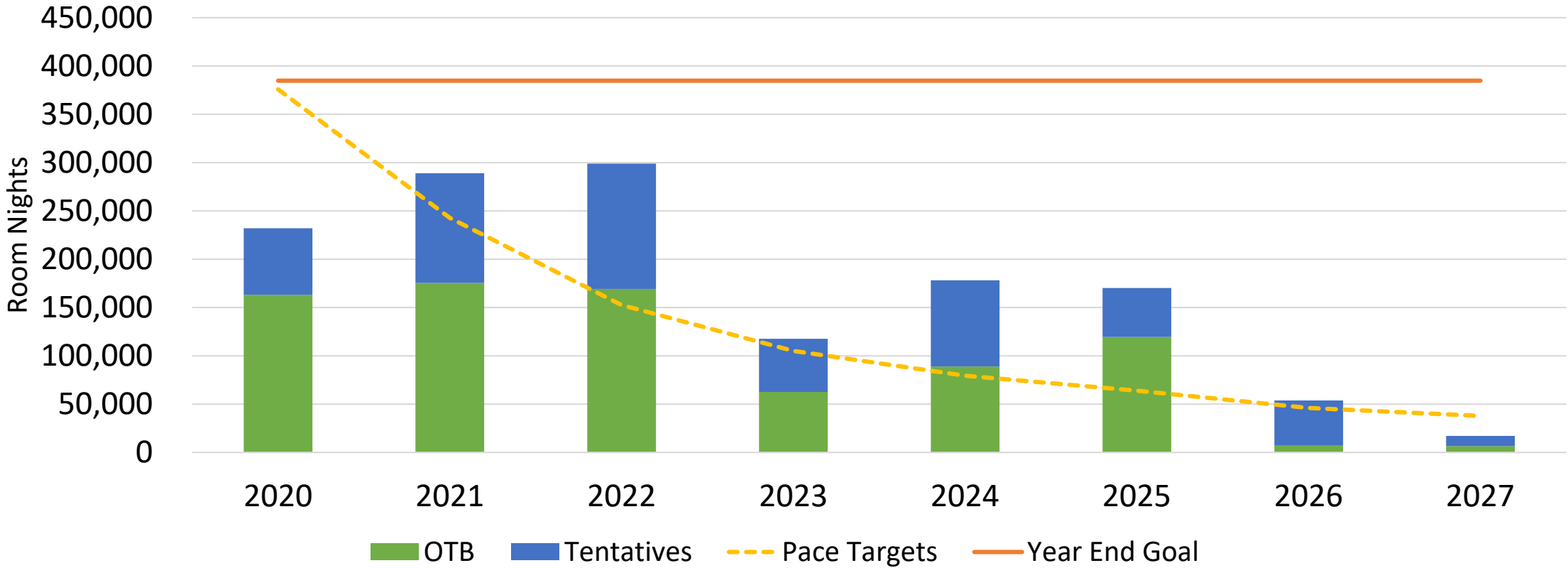
Aligning Meet Hawai'i's pace reporting to the way hotels report pace.

- **Long-Term Pace Report:** Due to citywide conventions, Meet Hawai'i is concerned about long booking windows which extends six to eight years in advance. Strategically, Meet Hawai'i wants to better understand in advance those time periods that are trending negative. The Long-Term Pace Report analyzes historical booking windows that assist in calculating Hawai'i's citywide pace targets.
- **STLY Pace Report:** Added to better align communication with you as hotel stakeholders. The STLY report is similar to your hotel's internal booking pace report, comparing the volume of business booked for the current year and each year in the future compared to one year ago.

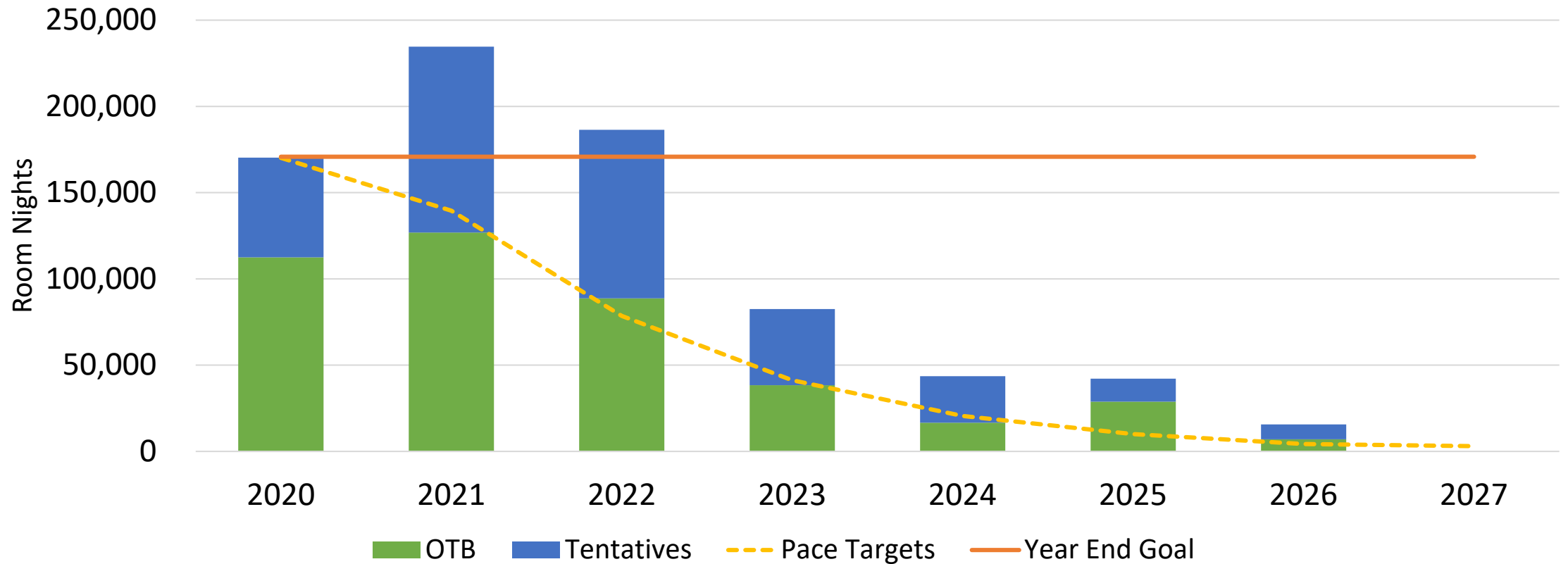
2020 PACE



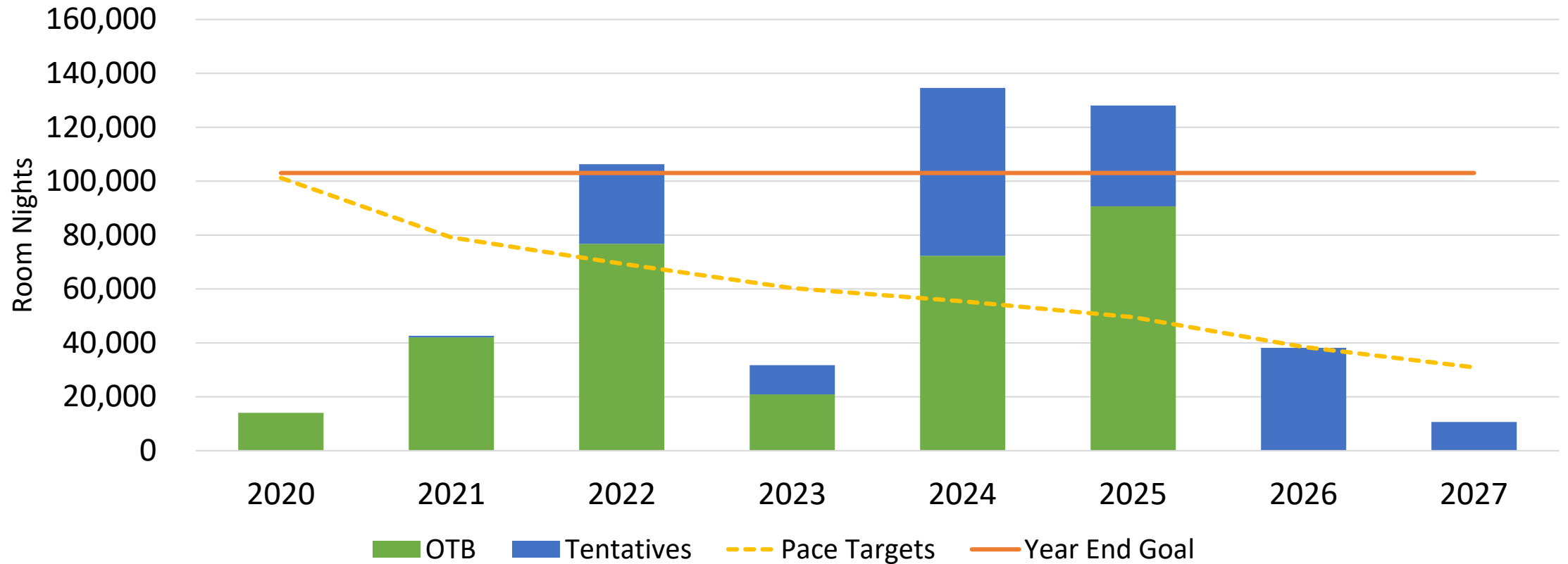
COMBINED PACE



SINGLE PROPERTY PACE



CONVENTION CENTER PACE



CITYWIDE CANCELLATIONS DUE TO COVID-19

Year	# of Groups Cancelled	Attendance	Definite Room Nights	Est Economic Impact	# of Groups Rebooked	Attendance	Definite Room Nights	Est Economic Impact
2020	14	49,509	153,637	\$304,622,115	2	17,500	25,350	\$79,664,051
2021	2	4,850	11,778	\$37,593,932	0	0	0	0
Total	16	54,359	165,415	\$342,216,047	2	17,500	25,350	\$79,664,051

2020 CITYWIDE CANCELLATIONS

Date	Event Name	Status	Rebooking Status	Attendance	Room Nights
4/23/2020	CHI 2020 Conference	Cancelled	2024 Rebid	3,000	4,167
5/5/2020	IMMUNOLOGY 2020	Cancelled	TBD	3,300	7,395
5/20/2020	Jump Dance Convention 2020	Cancelled	Annual Event	300	260
6/3/2020	111th Rotary International Convention 2020	Cancelled	2024 Rebid	18,000	52,383
6/11/2020	Varsity Spirit Championships 2020	Cancelled	Annual Event	759	292
6/19/2020	Goldschmidt Conference 2020	Postponed	2022 Rebook	3,500	5,100
7/2/2020	Pacific Rim Championships 2020	Cancelled	Annual Event	1,200	885
7/21/2020	AVID 2020	Cancelled	Annual Event	500	350
8/9/2020	NALC 2020 Biennial Convention	Cancelled	TBD	6,500	27,040
9/23/2020	PRiME 2020 Meeting	Cancelled	Rotation	3,000	8,335
10/13/2020	2020 ARVO Pacific Rim	Cancelled	TBD	1,200	1,600
10/27/2020	AAP 106th Annual Meeting	Cancelled	TBD	3,700	8,220
11/4/2020	ISESS 2020	Cancelled	TBD	250	575
11/11/2020	IFEBP 2020 Convention	Cancelled	Rotation	7,000	40,400
12/3/2020	Pac Futsal Tournament 2020	Cancelled	Annual Event	1,050	1,800
12/11/2020	2020 Pachem	Postponed	2021 Rebook	14,000	20,250

2021 CITYWIDE STATUS

Date	Event Name	Status	Attendance	Room Nights
2/5/2021	2021 BMT Tandem Meetings	Cancelled	4,500	9,678
6/13/2021	Bioelectromagnetics Society - BioEM 2021	Cancelled	350	2,100
7/13/2021	INCOSE 2021 Symposium	Definite	1,200	1,910
9/8/2021	2021 CEC/ICMC Biennial Conference	Definite	700	1,407
9/28/2021	Best Western 2021 Annual North American Convention	Definite	2,200	7,110
10/18/2021	SLOP Congress 2021	Definite	1,700	5,320
12/2/2021	Pac Futsal Tournament 2021	Definite	1,050	1,850
12/12/2021	2021 Pachem	Rebook	12,000	24,458

YTD PRODUCTION

Room Nights	2020 Year-To-Date	Prior Year	Variance to Prior Year
Combined Total			
Definite	45,089	163,911	-72%
New to Hawai'i	33,169	77,623	-57%
Tentative	558,070	839,088	-33%
Conversion Rate	8%	20%	-11%
Citywide			
Definite	7,317	24,185	-70%
New to Hawai'i	0	11,805	-100%
Tentative	104,429	297,743	-65%
Conversion Rate	7%	8%	-1%
Single Property			
Definite	37,772	139,726	-73%
New to Hawai'i	33,169	65,818	-50%
Tentative	453,641	541,345	-16%
Conversion Rate	8%	26%	-17%

MCI TRENDS

- Small Meetings of 10-50 sleeping rooms are currently being booked.
- Meetings will see continual shift to virtual events and many 2021 meetings will be hybrid combination of in-person and virtual.
- The meetings industry continues to be a in a holding pattern.
- Northstar's Pulse Survey found that a strong majority of planners (71%) intended to resume face-to-face events no later than the second quarter of next year. That number has dropped to 55 percent, with the rest eyeing Q3 or beyond.
- The demand and need for digital events have provided a boon for convention centers, centers have a role to play for virtual and hybrid conferences going forward.
- Convention Destinations have developed socially distanced protocols for future conventions, but the industry does not anticipate normal operations to return until at least the latter part of 2021 and only if a vaccine is available.



MAHALO!