



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

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

*Pō'akolu, 28 'Apelila 2021, 10:30 a.m.*  
**Wednesday, April 28, 2021 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.**

*E kāinoa mua no kēia hālāwai:*

**Register in advance for this webinar:**

[https://zoom.us/webinar/register/WN\\_P9avPIfoSRKDb5fs9AMPaw](https://zoom.us/webinar/register/WN_P9avPIfoSRKDb5fs9AMPaw)

*Ma hope o ke kāinoa 'ana, e ho'ouna 'ia ka leka uila  
hō'oiā iā 'oe me ka 'ikepili ho'oku'i hālāwai.*

**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'o'ōlelo Hālāwai*  
Approval of Minutes of the March 24, 2021 Marketing Standing Committee Meeting
3. *Hō'ike A Kūkākūkā No Ka Ho'opa'a Huaka'i A Nā 'Ākena*  
Presentation and discussion of the travel agents booking pace and general market research trends
4. *Hō'ike No Ka Hua o Ke Anamana'o TravelTrak Amelika Na OmniTrak*  
TravelTrak America survey results by OmniTrak



5. ~~*Hō'ike No Ka Huaka 'i Costeo*~~  
~~What is Costeo Travel, how much has changed since the end of February and what they are doing to gear up for the re-bound. Presentation by Jolene Schuerman; Hawai'i Buyer~~
6. *Hō'ike A Hawai'i Visitors & Convention Bureau No Ke Kūlana Huaka 'i Pū'ulua*  
MCI updates and discussion presentation by John Reyes; Senior Vice President, HVCB
7. *Hō'ike A HVCB No Ka Heluna Makemake No Hawai'i*  
Presentation by the HVCB that may include market insights, updates on air seats and certain assumptions including but not limited to programs for the balance of 2021
8. *Hō'ike A HTJ No Ka Heluna Makemake No Hawai'i*  
Presentation by HTJ including market insights, updates on airline booking pace, leisure and group segments and programs for the balance of this year
9. *Kūkākūkā A Ho'oholo No Ka Mo'ohelu Hokona HTA*  
HTA Branding Budget Discussion and Action
10. *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 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](mailto: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](mailto: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  
March 24, 2021

HTA Marketing Standing Committee Meeting



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 [Hawai'itourismauthority.org](http://Hawai'itourismauthority.org)

**David Y. Ige**  
*Governor*

**John De Fries**  
*President and Chief Executive Officer*

**REGULAR MARKETING STANDING COMMITTEE MEETING  
HAWAII TOURISM AUTHORITY  
Wednesday, March 24, 2021 at 10:31 a.m.  
Virtual Meeting**

**MINUTES OF MARKETING STANDING COMMITTEE MEETING**

**COMMITTEE MEMBERS PRESENT:** Kelly Sanders (Chair), George Kam, Benjamin Rafter, Kyoko Kimura, and Sherry Menor-McNamara, Fred Atkins

**COMMITTEE MEMBER ABSENT:**

**HTA STAFF PRESENT:** Kalani Ka'anā'anā, Jennifer Chun, Pattie Herman

**GUESTS:** Darragh Walshe, Charis Hidebrando, Ireen Lee

**LEGAL COUNSEL:** Gregg Kinkley

**1. Call to Order and Pule:**

Chair Kelly Sanders called the meeting to order at 10:31 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 Chair Sanders. Kalani Ka'anā'anā opened the meeting with an oli acknowledging the leadership and achievements of Prince Jonah Kūhiō Kalaniana'ole whose sense of joy and happiness and love of technology and innovation is worth embodying to achieve anything that one can imagine is possible.

**2. Approval of Minutes of the February 24, 2021 Marketing Standing Committee Meeting**

Chair Sanders requested a motion to approve the minutes of the February 24, 2021 Marketing Standing Committee meeting. George Kam made a motion, which was seconded by Kyoko Kimura. The motion was unanimously approved.

### **3. Update on Travel Agent Booking Pace and General Market Research Trends:**

Chair Sanders opened the discussion for the travel agent booking pace and general market research trends agenda. Jennifer Chun, HTA Director of Tourism Research, acknowledged that the data collected came from Global Agency Pro. She reported that Q1's booking pace in the US is more than half of the 2019 case and that Q4 is at the same level with 2019 and 2020. She noted that there's a significant amount of booking pick up compared to 2020 which can be attributed to the quarantine period that started March 26 of last year.

Ms. Chun reported that Japan is seeing negative travel bookings from last month because people are cancelling for Japan and that the major travel agencies are not selling packages for Hawai'i. She noted that with Air Canada not flying and WestJet having limited flights, there's low booking volume for Canada but there is a small amount of movement from last month and so with Q4. She said that there are bookings from Australia, there are bookings but very few from last month and negative for Q3. Ms. Chun reported that majority of the bookings for O'ahu, Maui, Kaua'i and Hawai'i Island will come from the U.S. and minimal from the other markets like Canada and Japan. She noted that people are booking closer in as there are minimal bookings in the future even though there's some activity for the U.S. market.

Ms. Chun reported that using the YouGov dataset, the HVCB team was able to publish two reports: COVID-19 Impact on U.S. Avid Travelers and YouGov Destination Index Trends Responsible Traveler Segment. She noted that the reports are looking at the various types of travelers and their conversations regarding their economic situation and future travel plans among others and for the U. S. responsible traveler segment respectively. She added that they are looking at it in an island by island basis compared to the normal weekly YouGov report where they are charting all the islands together. She said that metrics that are similar are grouped together like the number of people talking about O'ahu vs. whether they heard of O'ahu from word-of-mouth. She noted that the chart shows the percentage of people recommending Hawai'i, who considers coming and who are actually booking for Hawai'i. She noted that the high recommendations are very consistent with the visitor satisfaction score and that the idea of coming to Hawai'i as the next vacation destination is consistent with their marketing effectiveness project.

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

### **4. Presentation of the 2021 Brand Management Plan by each Global Marketing Team:**

Chair Sanders recognized the Global Marketing Team of Hawai'i Tourism Oceania (HTO) to provide an update. Mr. Darragh Walshe, HTO's Senior Account Director, reported that the vaccine rollout which already began and Australian-New Zealand travel bubble seen to open in April are key to the opening of borders and the return of airlift between Ocean Air and

Hawai'i. He said that exchange rates are as high as they have been in the past two years and that consumer confidence is up. He added that their key success has been the basic elimination of COVID-19 in Australia and New Zealand where they can attend big events and enjoy restaurants and hospitality. He said that Australia's job keeper wage support will end this month but other grants and support are available for business. He noted that key airline partners (Qantas, JetStar, Hawaiian and Air New Zealand) have scheduled flights to Honolulu in Q4.

Mr. Walsh reported that from the recent USA consumer research of the Visit USA organization in Australia and New Zealand, the affluent consumer is currently saving on travel with Hawai'i in their list with 47% actively planning for international travel in 2021. He said that the American Express Trends report showed that 78% of respondents want to travel this year and 56% will book a trip now even if they may need to cancel, which explains the number of bookings reported earlier by Ms. Chun. He noted that the American Express Travel Trends survey showed 59% of respondents tend to use a travel agent to plan and customize their trip. He added that there has been a huge buildup of desire for international travel with the lifting of travel restrictions and vaccine rollout. He turned the floor over to Ms. Charis Hidebrando, HTO's Senior Marketing Manager for her report.

Ms. Hidebrando reported that staying in their comfort zones than being more active is a high priority for Oceana travelers. She said that they intend on targeting the cultural explorers and the authentic experiences segments who are high value travelers inclined to travel mindfully. She added that both segments are highly educated, high income earners, digitally savvy and place importance on discovering authentic experiences, culture, history and giving back. She said that they plan to survey their consumer database and social media audience in Q1 and Q2 which will give an indication of repeat visitor satisfaction as gleaned from last year's survey. She added that sentiments from organic social media shows that their audience are still dreaming of Hawai'i. She noted that the HTA's grand pillars are always guiding their core brand messaging.

Ms. Hildebrando reported that they have three stages of recovery plan: (1) Inspiration and dreaming phase, (2) brand depth and active planning, and (3) conversion and booking. She noted that these stages focuses on inspiration, building deeper and richer connections and engagements, and collaboration with airline partners and restarting paid media across digital channels respectively.

Ms. Hildebrando reported that trade partners are now starting to work on their international travel strategy and promotions after a period of hibernation. She noted that travel agents will be highly sought after once people can travel internationally for they provide much needed and will play a key role in matching the right traveler to Hawai'i. She said that HTO will focus on responsible tourism and themes aligned with HTA's pillars for their trade strategy. She added that they will also run a visitor satisfaction survey and will continue building community of Hawai'i experts through their signature educational events and initiatives.

Mr. Walsh reported that their MCI strategy is seen to be having positive conversations around repeat business returning to Hawai'i with strong network of partners and loyal customers with responsible tourism playing an important part in their DNA. He added that according to the G Adventuress Survey 2021, 73% of Oceana travelers want their travel to benefit local communities. Mr. Walsh said that the HTO Sea Cleaners initiative will use international coastal cleanup day in September, 2021 to begin local activity to set the scene for the restart of the program in 2022. Mr. Walsh noted that the Mālama Hawai'i initiative resonates very well with the Oceana traveler and that they started discussions on implementing the Mālama Hawai'i program to their marketing and will be talking to the industry partners, HVCB and HTA to how best bring the program to their market.

Mr. Walsh reported that their BMP timeline begins with activities not requiring budget spend and investments will begin in Q3 and Q4 with the opening of borders. He noted that compared to 2019, their administration costs is reduced down by 65% in 2020 and 85% with a budget of \$400,000 in 2021. He said that they are looking for marketing spend budget to come back in Q3 and Q4 but will continue on activities with no marketing spend through Q1 and Q2. He said that by ensuring the HTA's key pillars woven throughout all activities, a positive influence with regards to visitor satisfaction and resident sentiment will be felt from Oceana.

Chair Sanders asked whether the vaccine passport is seen as an opportunity to travel outside of the country. Mr. Walsh responded that though there are no formal announcements from the government, it's likely to happen with Qantas grounds that only those vaccinated will be able to fly with them.

Ms. McNamara asked for the timeline of vaccination. Mr. Walsh answered that vaccination started in February for both Australia and New Zealand and aims for the majority of the population vaccinated in Q3. He said that Australia will be producing their own AstraZeneca vaccine where they have permission to produce locally. He noted that New Zealand have enough of the Pfizer bought for the whole population so they could just go with the one vaccine.

Ms. McNamara asked about the anticipated timeframe for the opening of boarders and if there are target places where travelers are allowed to go. Mr. Walsh answered that to start the process, they need the Australian-New Zealand travel bubble to open which is likely in April and international travel will follow suit. He noted that how COVID is controlled and the vaccine rollout will be important aspects for international markets.

Mr. Atkins asked the amount of time they're going to give to gear up for an opening to Hawai'i. Mr. Walsh responded that the first flights are likely being approved in October which is at par with the current flight schedules of Qantas, JetStar and Air New Zealand and Hawaiian in Q4. He added that they're hoping to know of the travel approval between New Zealand and Hawai'i at least two or three months prior.

Mr. Atkins asked if there will be quarantine and pre-test requirements with the Australian-New Zealand travel bubble. Mr. Walsh responded that the concept of the bubble is for people to be able to travel freely between Australia and New Zealand.

Chair Sanders recognized Irene Lee, HTK's Country Manager to provide an update. Ms. Lee reported that Korea's economy is projected to grow 3.2% this year. She noted that Korea's GDP 2020 ranking moved to the world's 9th largest economy from 11<sup>th</sup> the previous year and that the current exchange rate is steady compared to last year. She said that they've seen 4.27 million people traveling outbound last year which was - 85% compared to Korean visitors to Hawai'i which was slightly better at -78% . Ms. Lee added that there is currently one flight a week with Hawaiian Airlines flying from Korea to Honolulu but are increasing to two flights from April 4<sup>th</sup> due to increasing demand. She noted that Korean Air is projected to resume service on Q3 or Q4.

Ms. Lee reported that they have about 6,500 active COVID cases with manageable level of cases per day. She noted that large gatherings are restricted and though their borders never closed, the government restricted non-essential travels until April 17 which is likely to be extended each month. She said that Korea required PCR test negative results starting February 24 for all incoming visitors and Korean nationals. She said that the government has set aside \$1.37 billion budget for the tourism industry which is about 11.2% increase from last year.

Ms. Lee reported that about 700,000 people were vaccinated as of yesterday with the goal of inoculating 70% of the total population by November this year. She noted that currently, four major hospitals are included in the pre-travel testing program. She added that the Incheon Airport Test Center has submitted all approved documents to be included in the program and awaiting announcement from the Department of Health of Hawai'i, which is will be a game changer for Korean Air resuming flights to Hawai'i because the test results are available within one hour of testing.

Ms. Lee reported that major Korean agencies have started selling overseas travel products since January. She noted that Interpark Tour, which is one of the largest OTA in Korea, sold \$9 million worth of revenue with about 15,000 bookings within one hour of sales from their TV Home Shopping sales that started in January. She added that for the lunar New Year holiday in February, the booking rate for flights and hotels to Jeju Island reached about 80% and 70% respectively. She added that Instagram surpassed Facebook as the most used social networking service in 2020 and that YouTube announces that the subscription has increased by 67%.

Ms. Lee reported that they will be targeting mindful travelers which include the millennial minded people, mainstreamers and first-time travelers. She noted that their key recovery strategies are to revitalize the market demand, refresh the images of Hawai'i as a safe and sustainable destinations, inspire the Korean travelers, and leveraging HTK owned channels. She added that their B2C tactics include generating more specific travel stories targeting



their audience, promoting Hawaiian culture and Mālama initiative, maintaining social media channels active, and ensuring all coop programs will include a social media component as a call to action.

Ms. Lee reported that their trade marketing strategy includes campaigns to accelerate the pace of Hawai'i bookings with trade partners, drive high value visitation to increase PPDS and destination brand awareness. She added that they will be working with four leading travel trade partners among others to include the Mālama branding campaign in their coop programs, organize educational seminars online and offline, and work with airlines to increase or reinstate their services to Honolulu as soon as possible. She noted that their Aloha Specialist University (ASU) training program is a year round agent training program where they will be conducting quarterly webinars and year-end offline training to convey the contents of Kuleana Mālama.

Ms. Lee reported that their marketing strategy for MCI is to promote Hawai'i as the COVID-19 MCI travel destination and it's geared towards targeting high value MCI leads in 2022 and 2023. She noted that they will be conducting virtual meetings this year which will include destination updates, destination sanitary measures and Mālama Hawai'i initiatives. She said that they will be targeting the mindful travelers with strategies to maintain the cultural integrity of the Hawaiian culture and increase awareness and understanding of its deep culture.

Ms. Lee reported that for their BMP timeline, they will be conducting social media messaging, media PR efforts, trade sales calls and industry communication throughout the year and that major campaigns and programs on the second half of this year with an annual total budget of \$300,000. She added that they target to meet or exceed PPDS of \$71 dollars, \$290 million for 2021 total expenditure and aim to maintain or improve visitor satisfaction and resident sentiment score from 2019.

Chair Sanders asked if returning residents still need to go through the 14-day quarantine and clarified if the border will be lifted in Q4. Ms. Lee responded that everyone will undergo quarantine and that the travel industry and airlines are pushing the government to ease the quarantine to five to seven days for travelers with the vaccine passport.

Mr. Atkins asked if the Hawaiian Airlines flights that are now operating are mostly for cargoes and if they're adding more flights because of this. Ms. Lee responded that the average load factor is 20% to 30% so it includes some passengers and added that since the TTP program launched, they are seeing some increase in actual travel which is mostly essential travels.

Mr. Rafter asked the indicators needed to actually spend money on. Ms. Lee answered that they have started booking international travels since January and that other competitive destinations are already beginning to do some large scale marketing programs to target the early shooter of these avid travelers. She added that trade partners are offering non

cancellation penalties on these booking so the agents are actually seeing increased bookings which is so far mostly Southeast Asian destinations. She added that for Hawai'i, their Korean operators are preparing for the market to actually open with actual leisure travelers from summer.

Chair Sanders recognized Pattie Herman to provide information related to conversations on the BMP. Ms. Herman shared the strategic brand marketing guideline for BMP which aims to bring back tourism based on the condition of COVID-19 and the CDC guidelines with the assumption of HTA investing in the five markets and their 2021 combined market being \$21.205 million. She noted that they are hoping to reinvest in all of the GMTs that have been terminated and bring them back in fiscal 2022 depending on metrics such as air access, visitor's expenditure, in market travel restrictions and in market vaccination. She said that what should take place for brand marketing activities will depend on the four tiers and budget allocation range.

Ms. Herman reported that brand marketing activities for tier1 will be more on messaging and education, tier 2 with an added component of social marketing and online marketing, tier 3 with advertising, PR and promotions, more aggressive trade marketing and "It's time" video and tier 4 will be very much wide open. She noted that for budget allocation, tier 1 has fixed cost for all of the GMTs except for HVCB with their pre-committed programs, tier 2 has fixed cost plus limited programs, tier 3 will slowly increase and a full budget of the reduced annual budget which is \$20 million and tier 4 will be all go.

Mr. Atkins asked if full funding is going to happen as early as July. Ms. Herman answered that everything is not fixed but signals are affirming as long as the vaccine rollout stays on time and there's not resurgent and hopefully, the 14 day quarantine isn't required.

Ms. Kimura asked if it's possible to see the GMT budget for Korea and Oceania as the total arrivals on January is for others, which include Korea and Oceana. Ms. Chun responded that they have arrivals for all the other market that they are tracking in their website. She added that there are no expenditure calculations because there are not enough people coming right now.

Chair Sanders as for public testimony and there was none

## **5. Adjournment:**

The meeting adjourned at 12:00 p.m.

Respectfully submitted,



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Sheillane P. Reyes

Recorder

## **Agenda Item #3:**

Presentation and discussion of the travel agents booking pace and general market research trends

# TRAVEL AGENCY BOOKING TRENDS

APRIL 19, 2021

HAWAII TOURISM

AUTHORITY

# Global Agency Pro

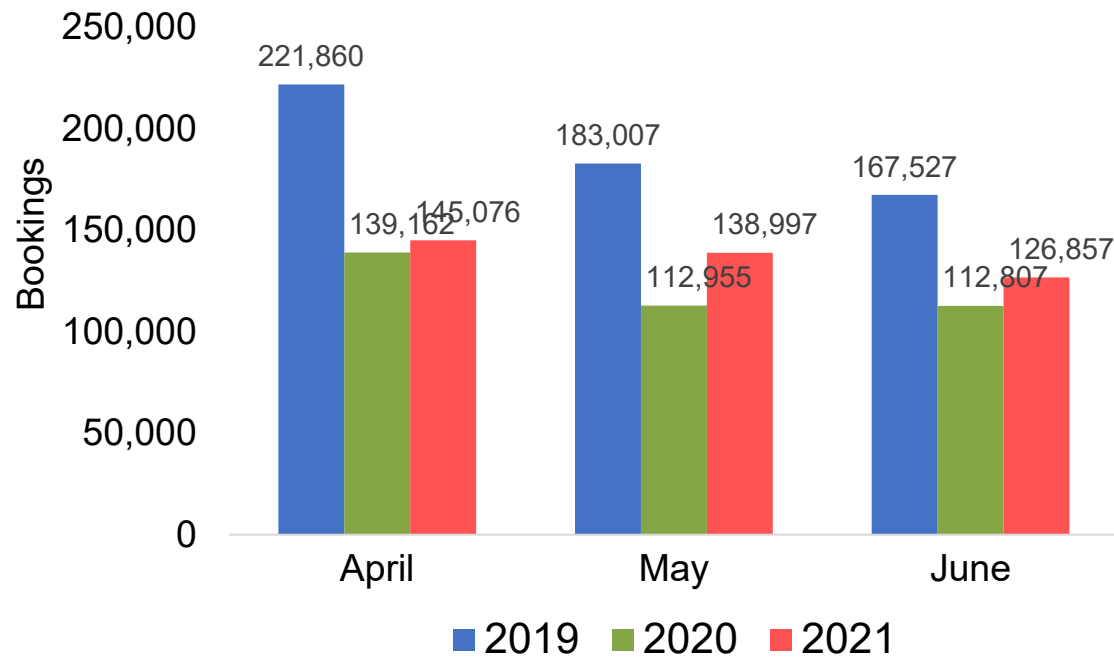
- HTA subscribes to Global Agency Pro, an online travel distribution system consisting of Travel Agency data.
- Global Agency Pro provides access to over 90% of the world's Travel Agency airline transactions.
- The database consists of five years of historical ticketing data and one year of advance purchase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

# Global Agency Pro Index

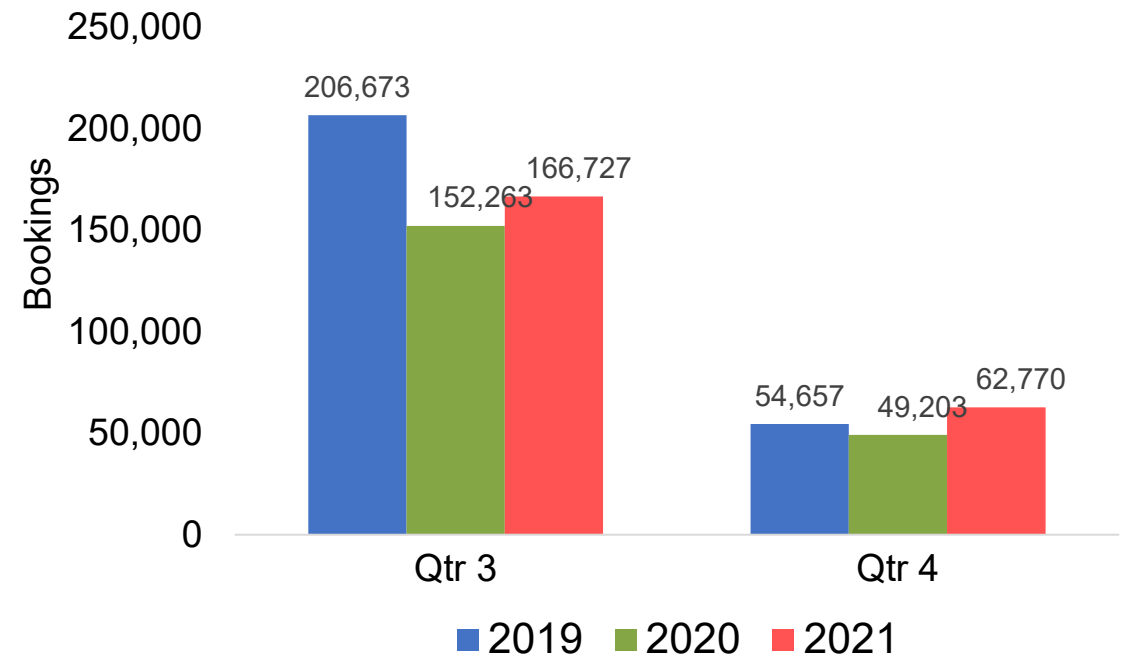
- **Bookings**
  - Net sum of the number of visitors (i.e., excluding Hawai'i residents and inter-island travelers) from Sales transactions counted, including Exchanges and Refunds.
- **Booking Date**
  - The date on which the ticket was purchased by the passenger. Also known as the Sales Date.
- **Travel 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, by Month



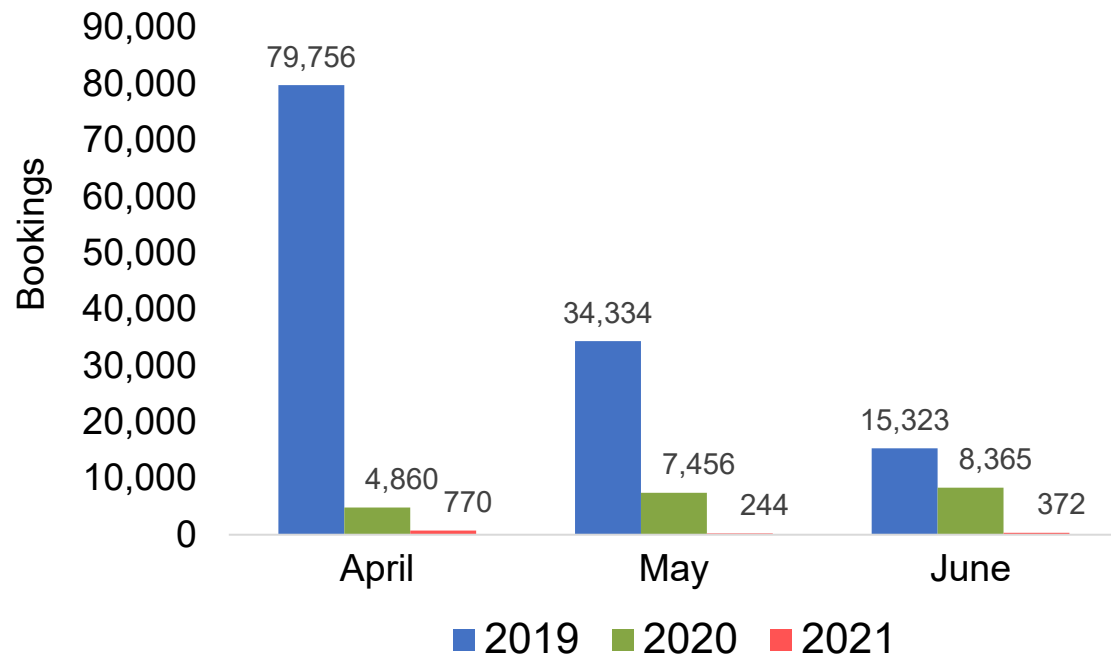
## Travel Agency Booking Pace for Future Arrivals, by Quarter



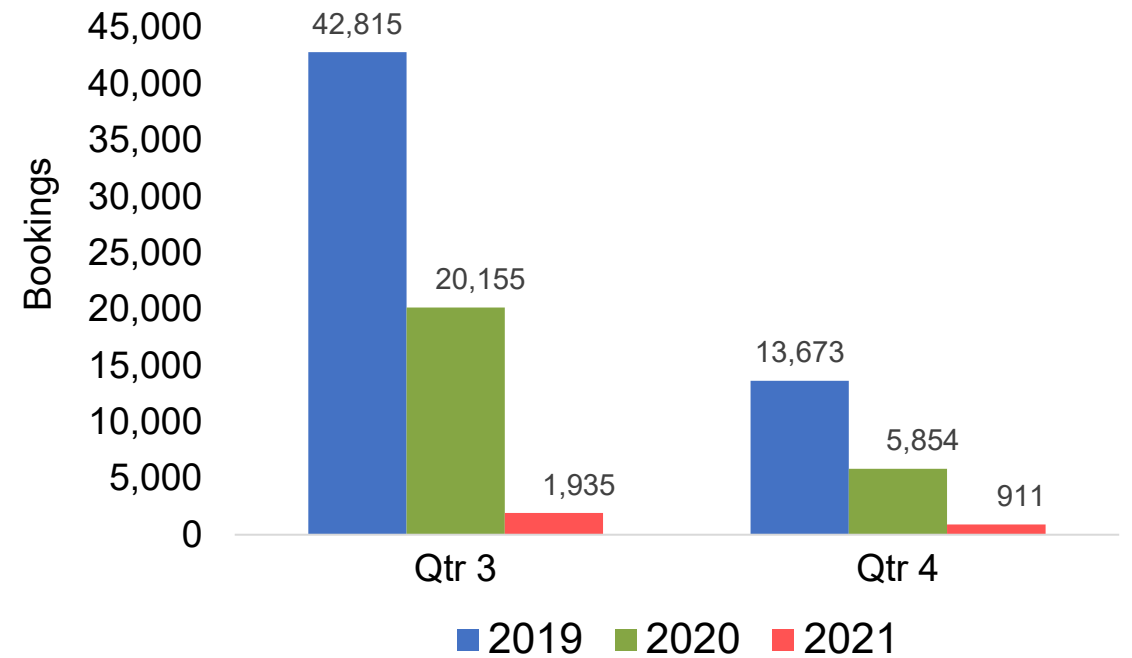
Source: Global Agency Pro as of 04/17/21

# JAPAN

### Travel Agency Booking Pace for Future Arrivals, by Month



### Travel Agency Booking Pace for Future Arrivals, by Quarter

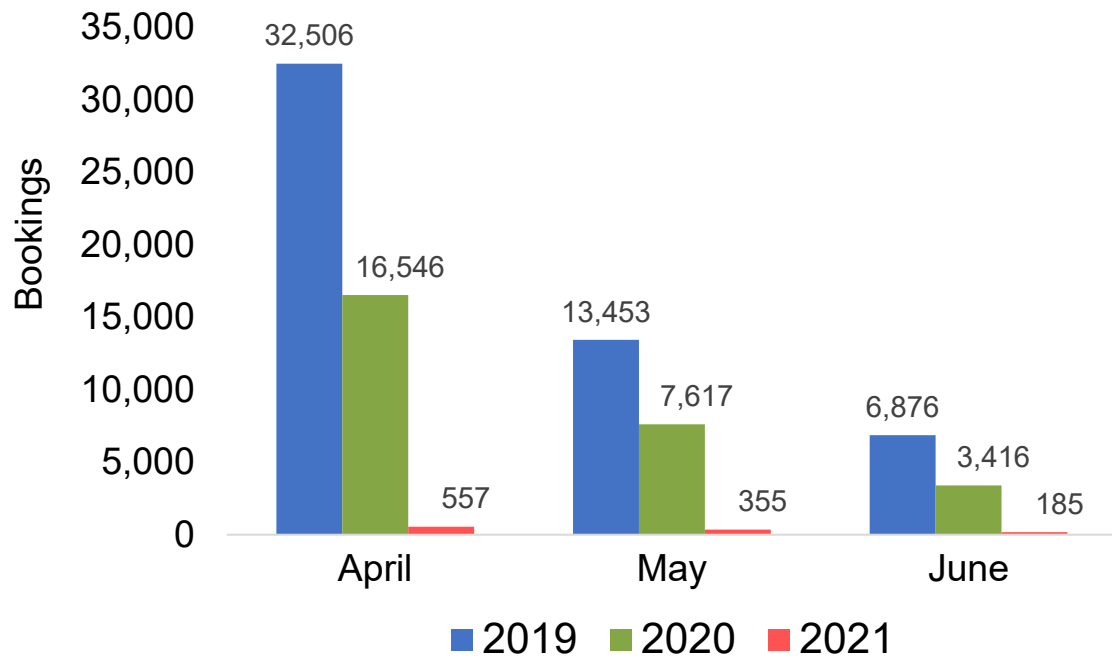


Source: Global Agency Pro as of 04/17/21

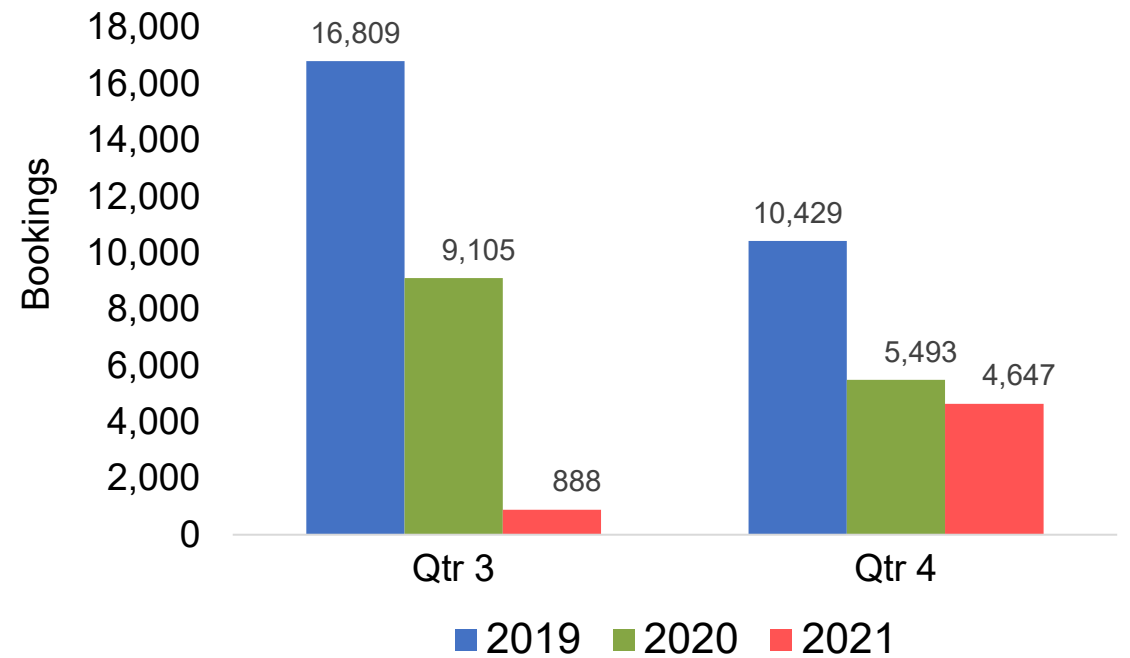


# CANADA

Travel Agency Booking Pace for Future Arrivals, by Month



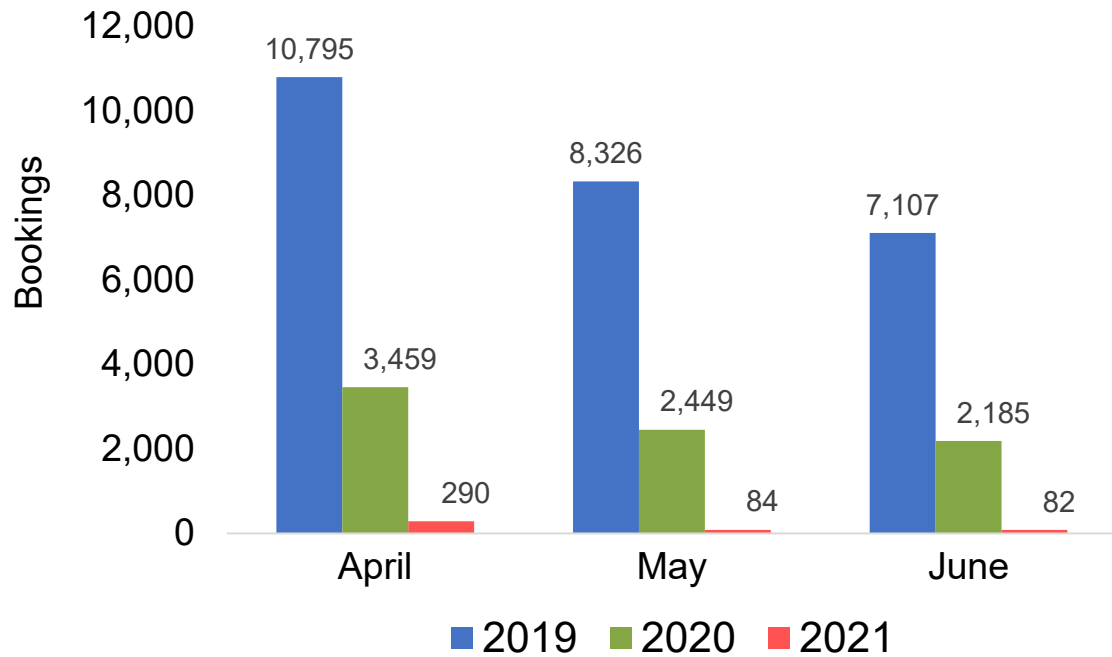
Travel Agency Booking Pace for Future Arrivals, by Quarter



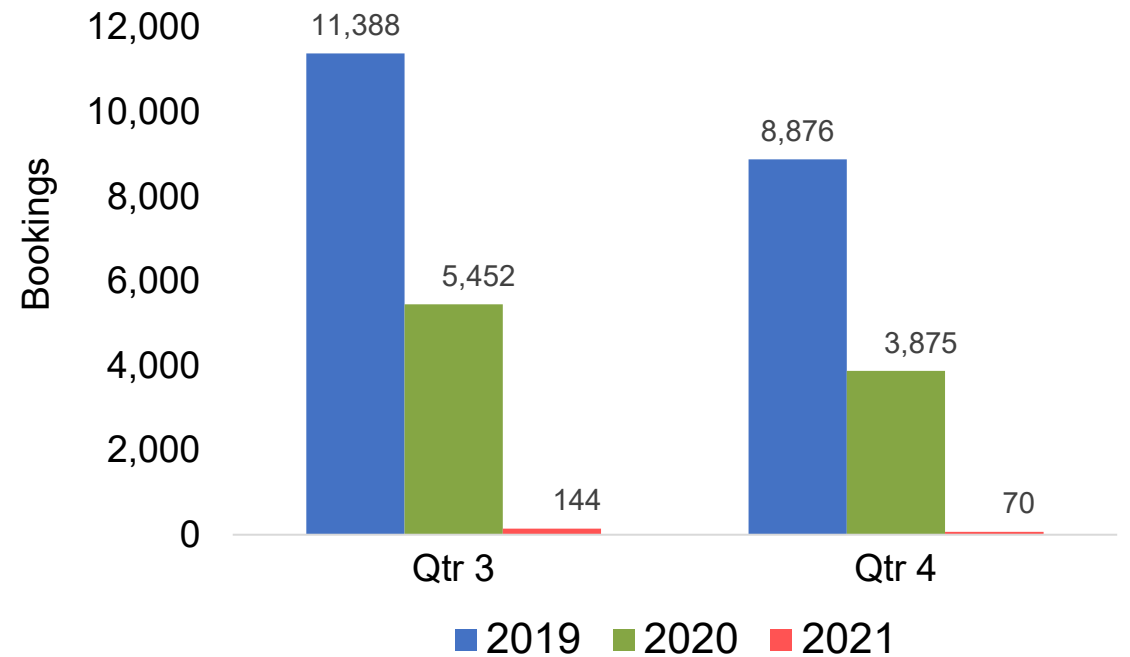
Source: Global Agency Pro as of 04/17/21

# KOREA

Travel Agency Booking Pace for Future Arrivals, by Month



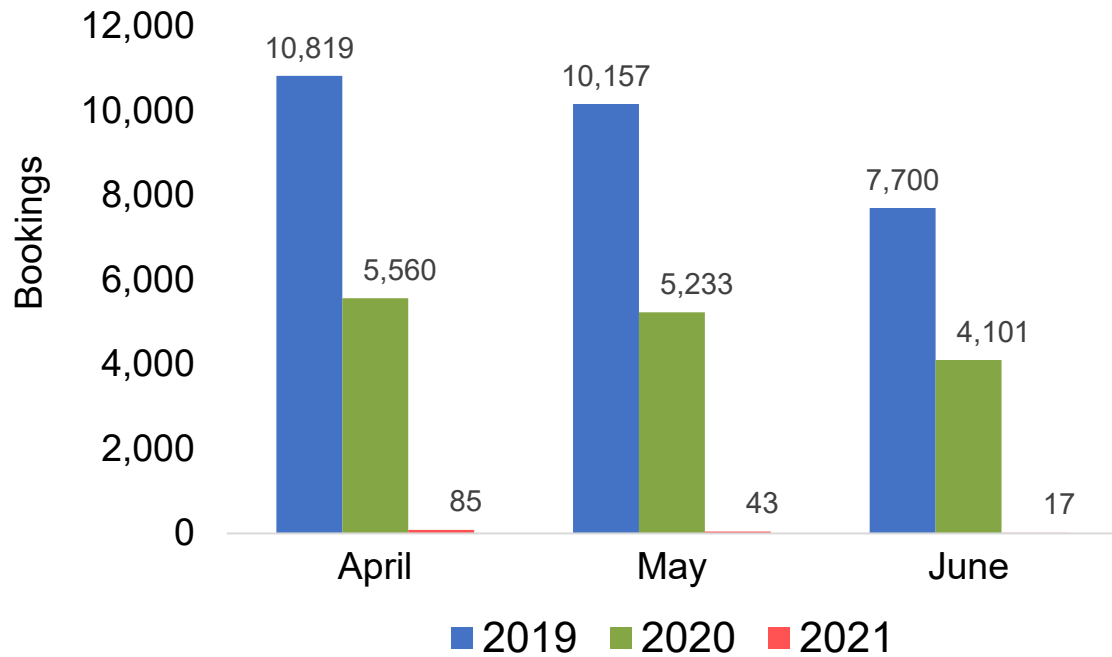
Travel Agency Booking Pace for Future Arrivals, by Quarter



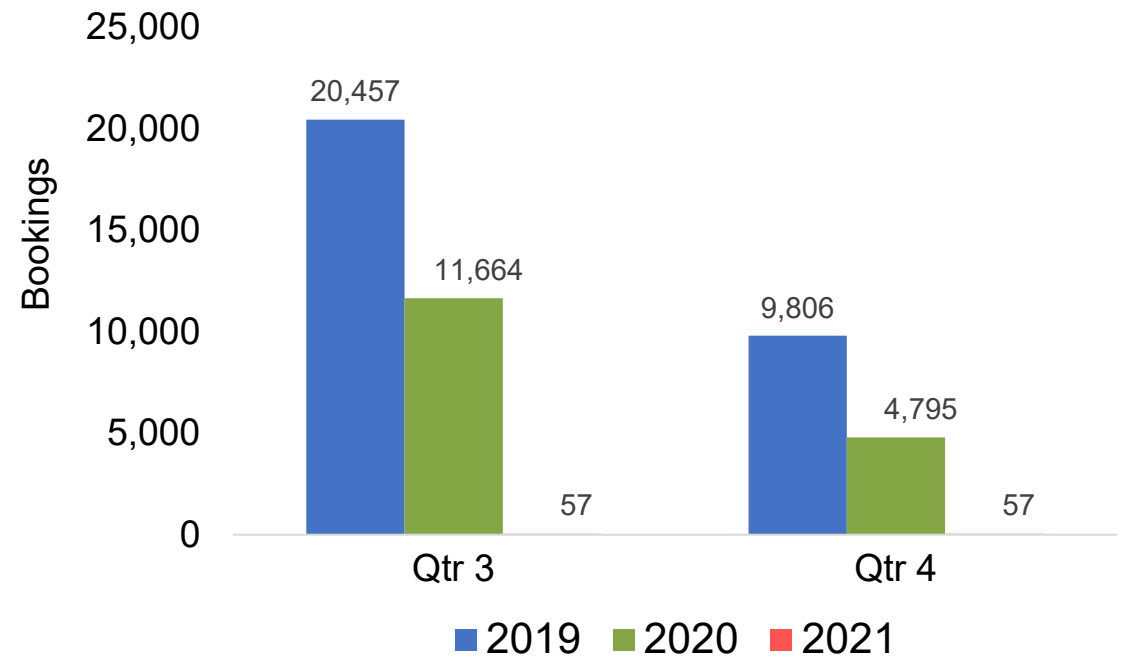
Source: Global Agency Pro as of 04/17/21

# AUSTRALIA

Travel Agency Booking Pace for Future Arrivals, by Month



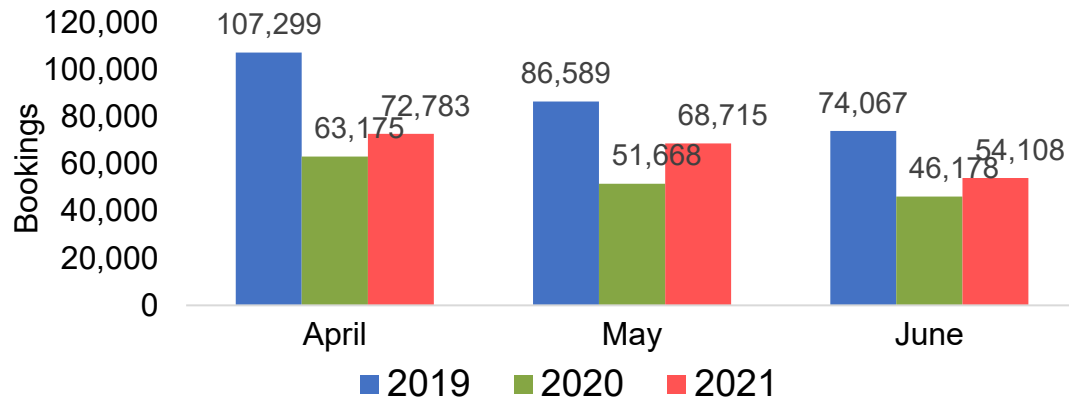
Travel Agency Booking Pace for Future Arrivals, by Quarter



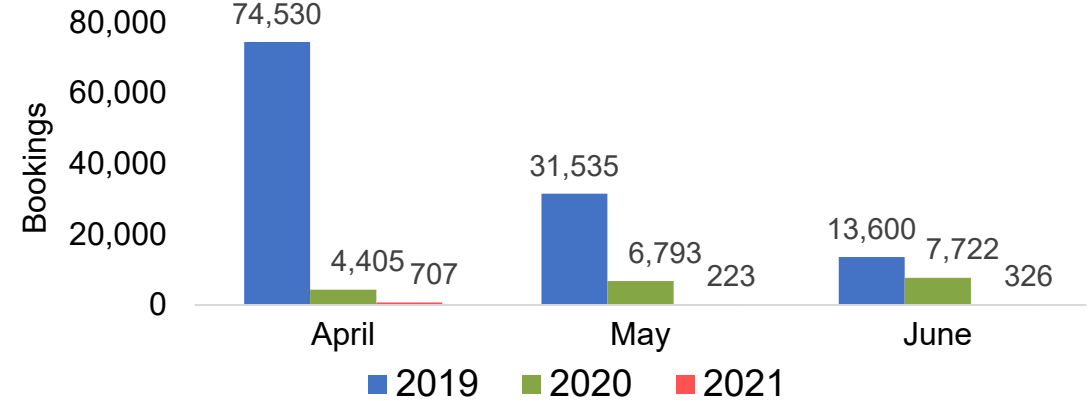
Source: Global Agency Pro as of 04/17/21

# O'ahu by Month 2021

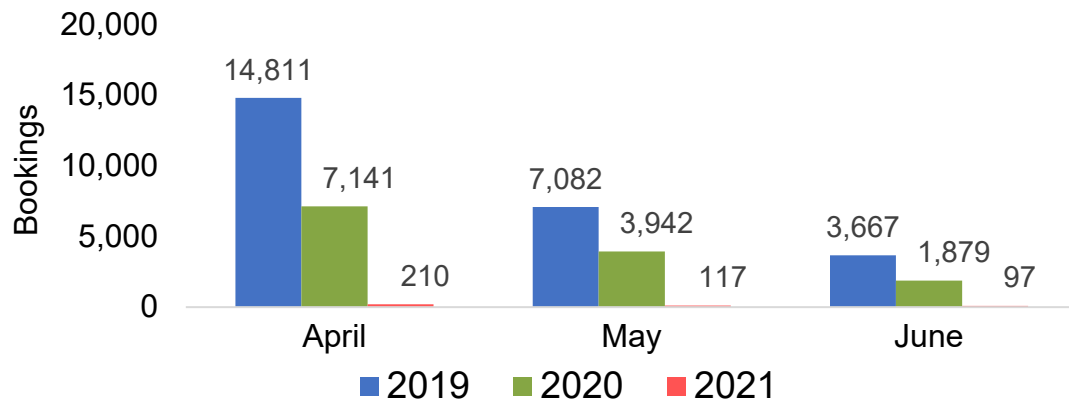
Travel Agency Booking Pace for Future Arrivals  
U.S.



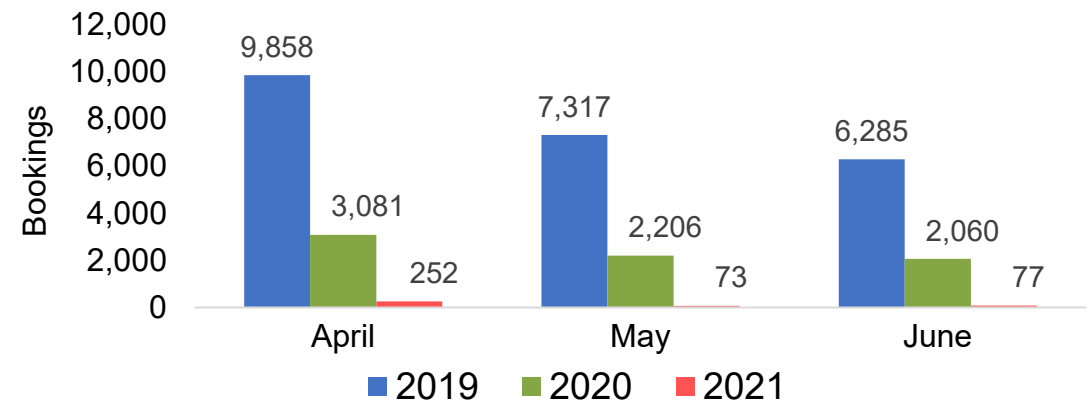
Travel Agency Booking Pace for Future Arrivals  
Japan



Travel Agency Booking Pace for Future Arrivals  
Canada

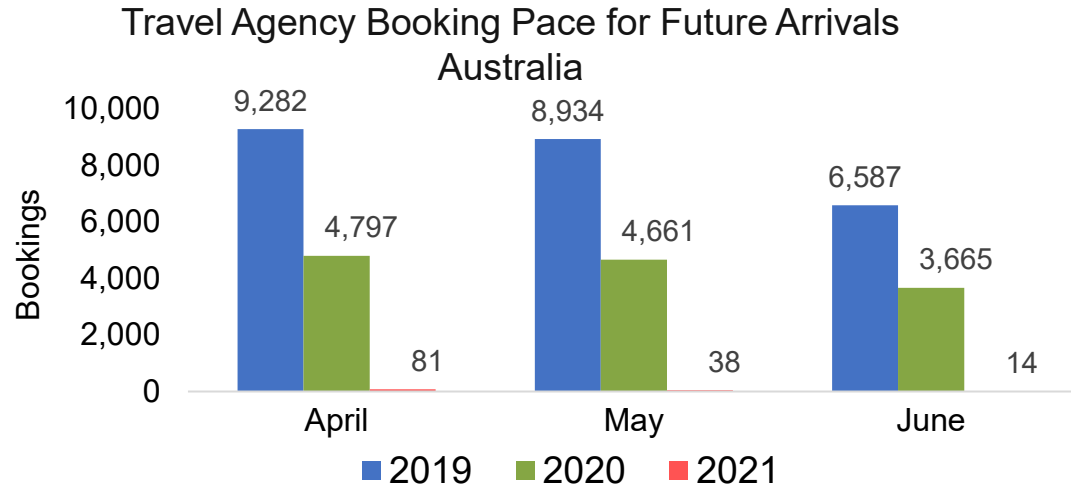


Travel Agency Booking Pace for Future Arrivals  
Korea



Source: Global Agency Pro as of 04/17/21

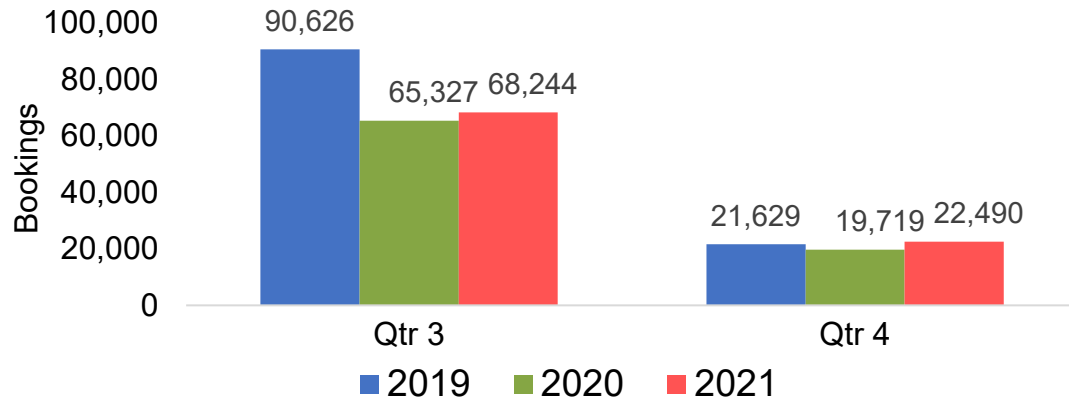
# O'ahu by Month 2021 (cont.)



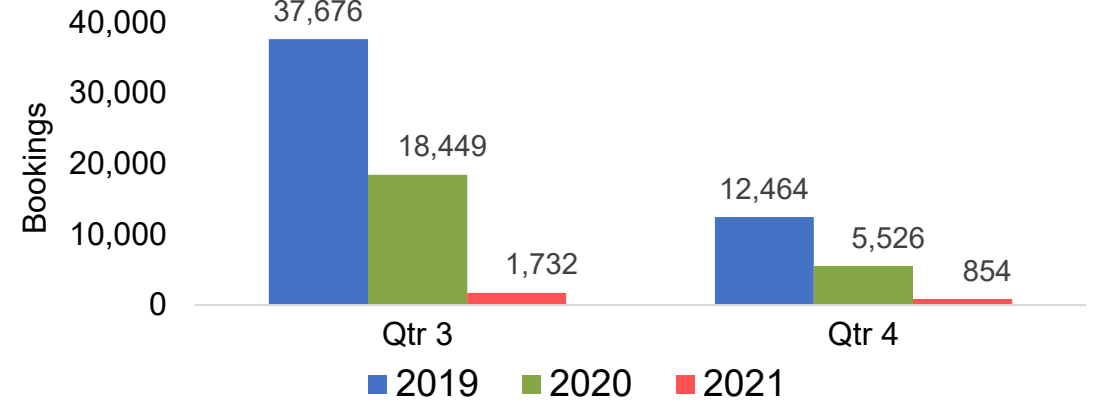
Source: Global Agency Pro as of 04/17/21

# O'ahu by Quarter 2021

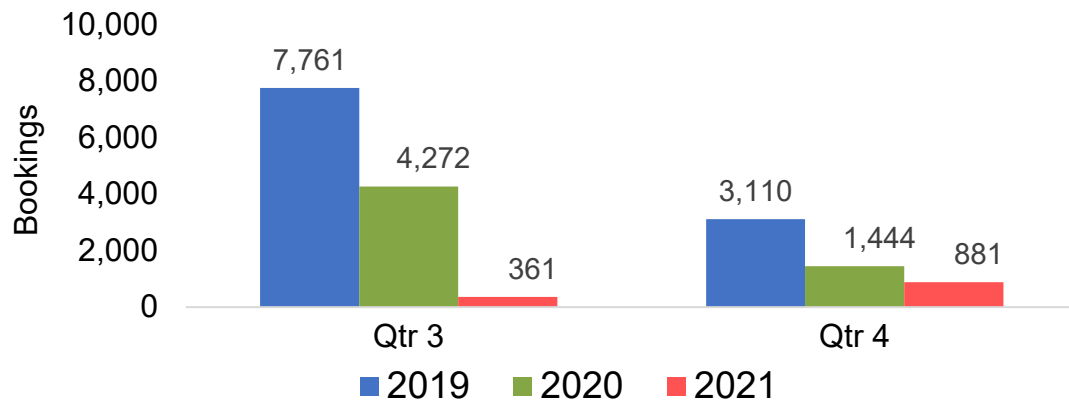
Travel Agency Booking Pace for Future Arrivals  
U.S.



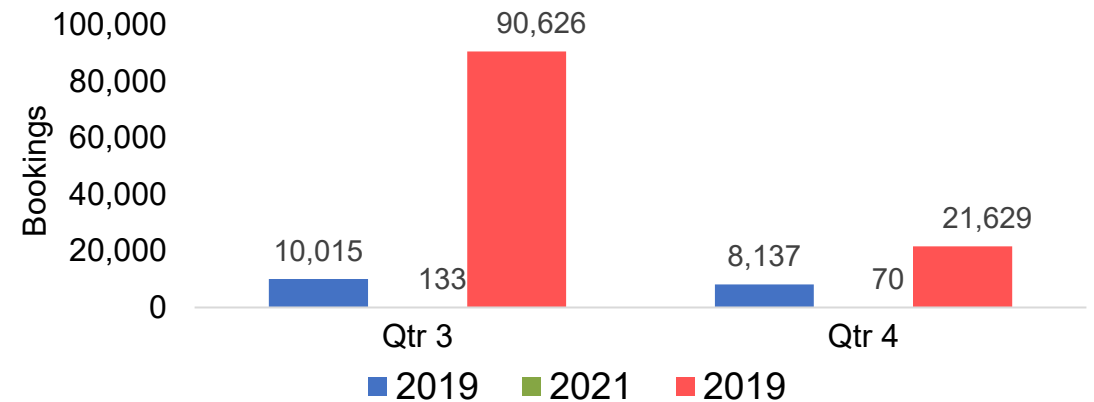
Travel Agency Booking Pace for Future Arrivals  
Japan



Travel Agency Booking Pace for Future Arrivals  
Canada

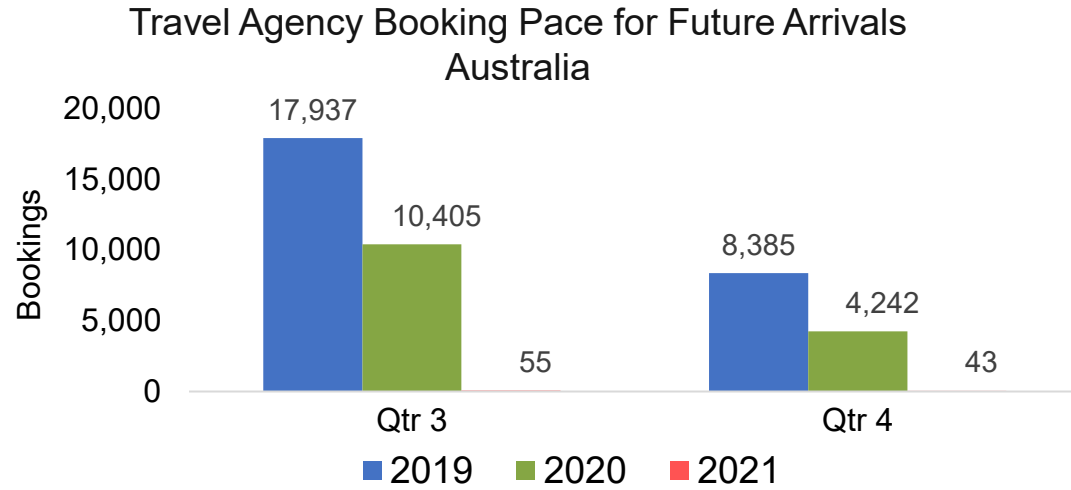


Travel Agency Booking Pace for Future Arrivals  
Korea



Source: Global Agency Pro as of 04/17/21

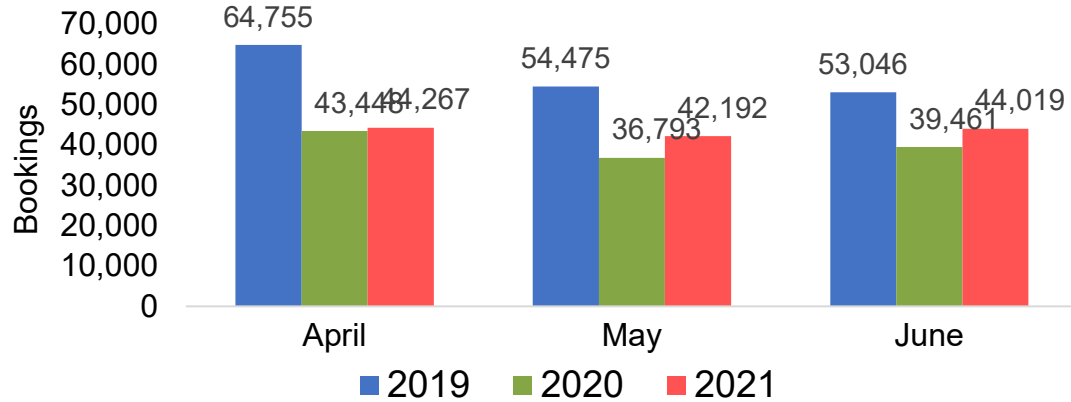
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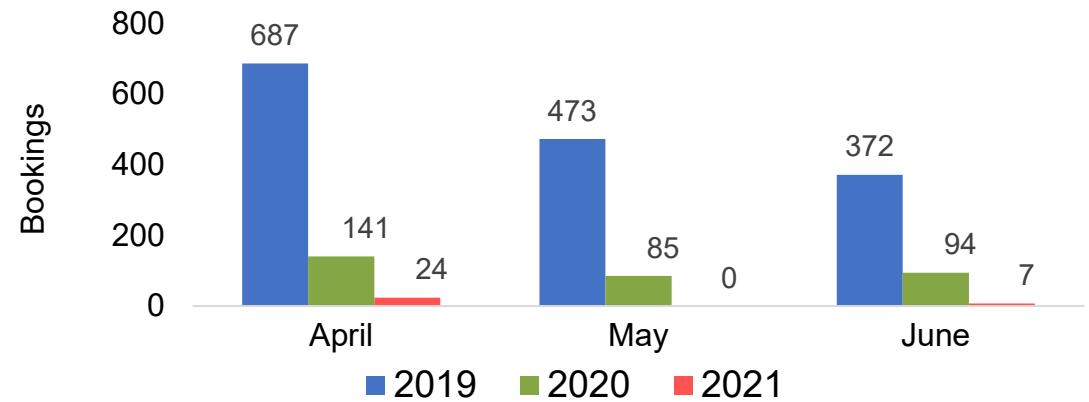
Source: Global Agency Pro as of 04/17/21

# Maui by Month 2021

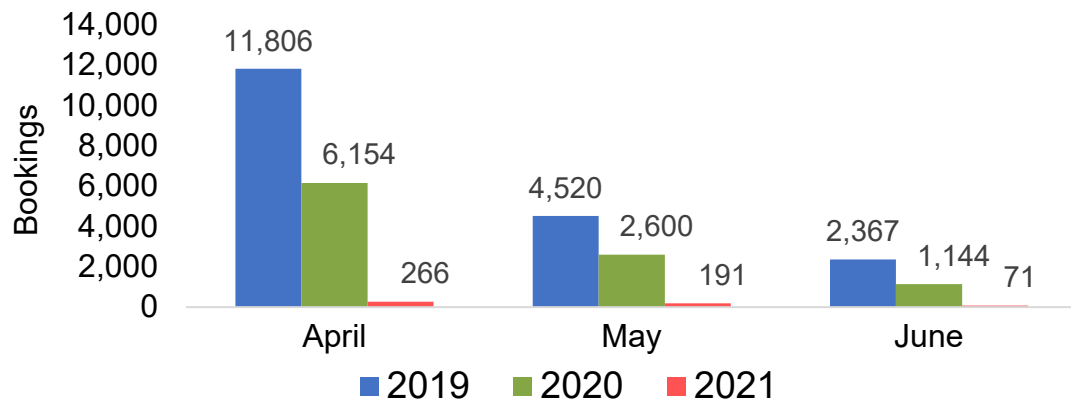
Travel Agency Booking Pace for Future Arrivals  
U.S.



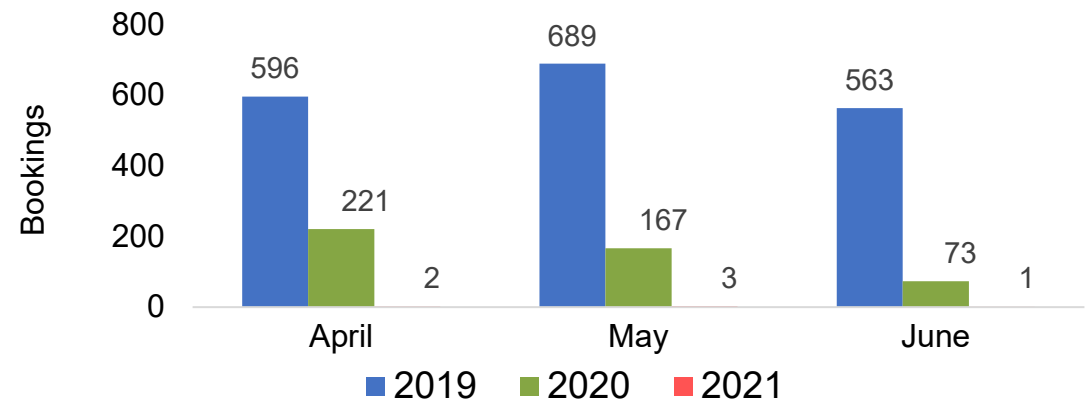
Travel Agency Booking Pace for Future Arrivals  
Japan



Travel Agency Booking Pace for Future Arrivals  
Canada



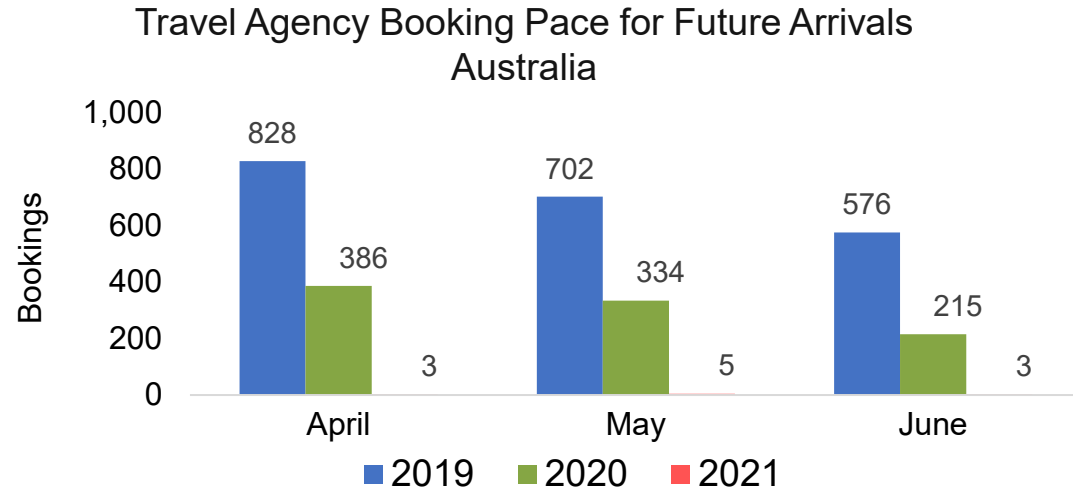
Travel Agency Booking Pace for Future Arrivals  
Korea



Source: Global Agency Pro as of 04/17/21



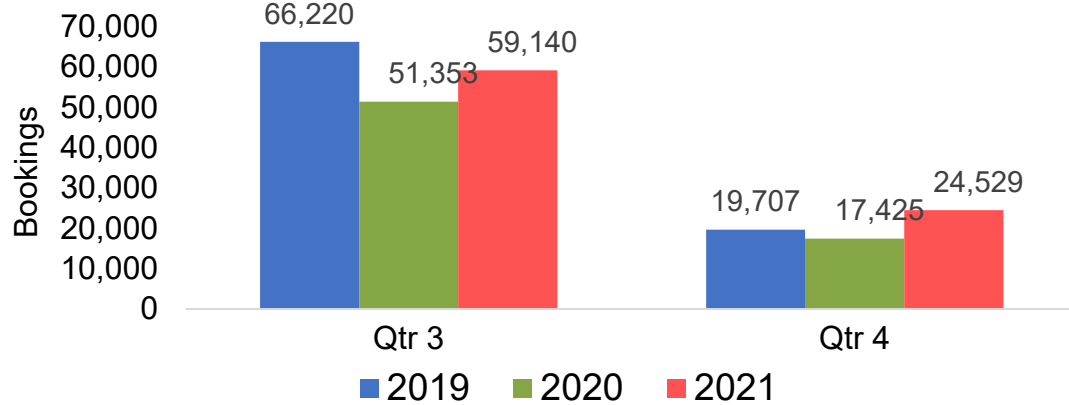
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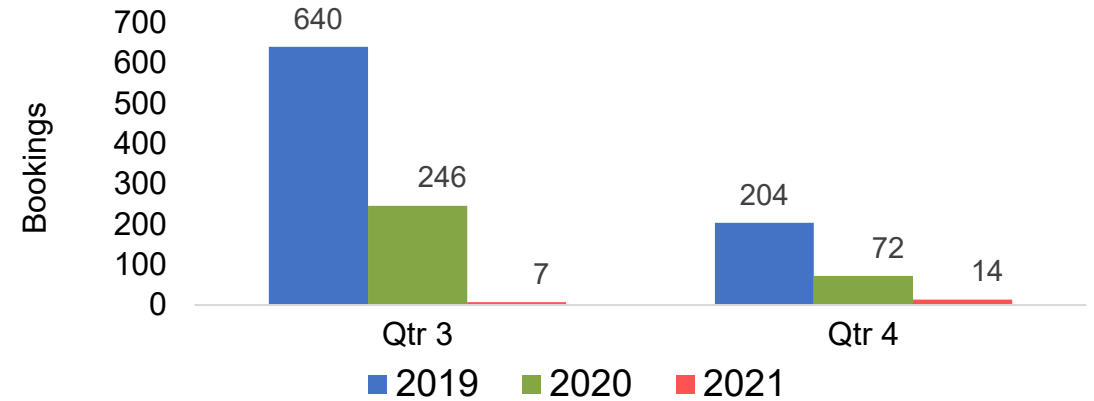
Source: Global Agency Pro as of 04/17/21

# Maui by Quarter 2021

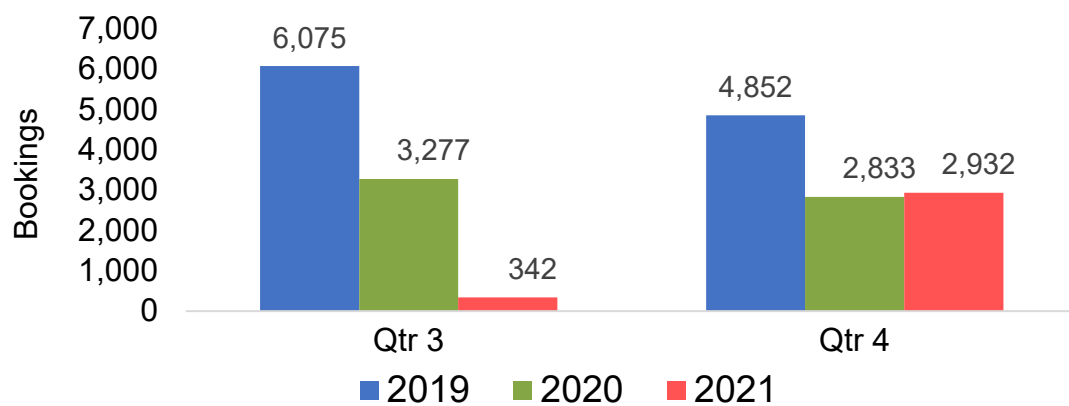
Travel Agency Booking Pace for Future Arrivals  
U.S.



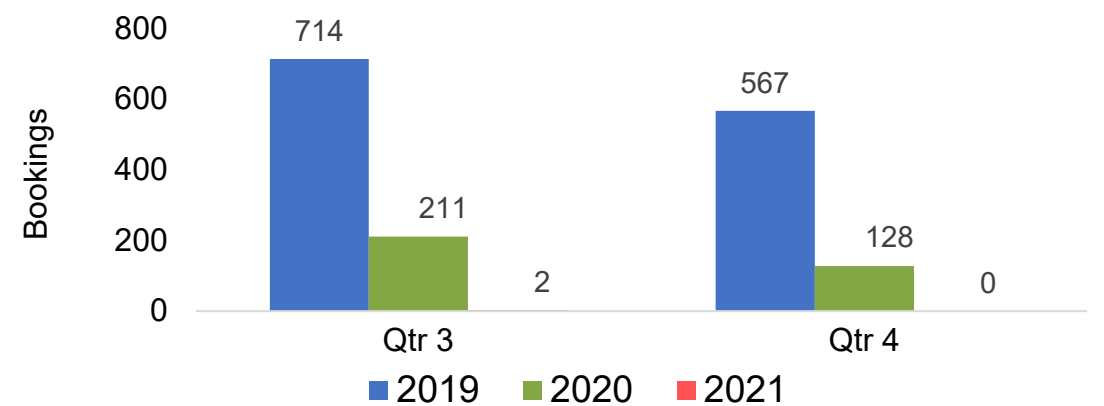
Travel Agency Booking Pace for Future Arrivals  
Japan



Travel Agency Booking Pace for Future Arrivals  
Canada



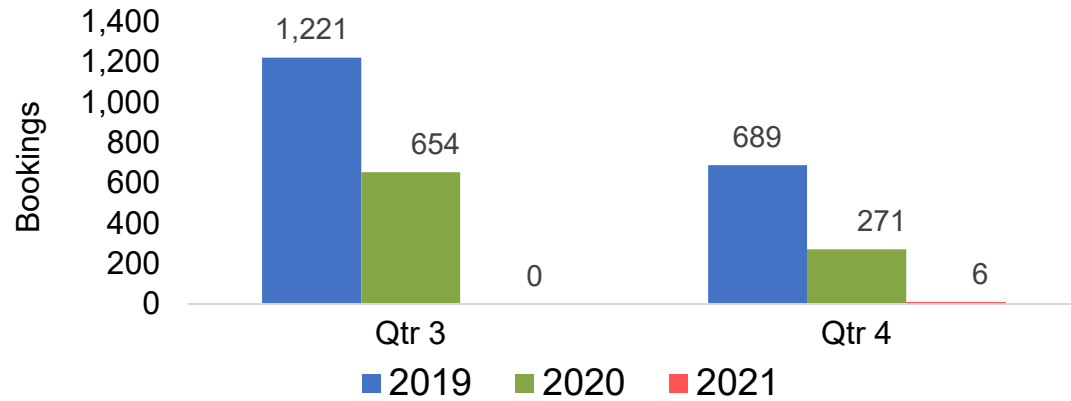
Travel Agency Booking Pace for Future Arrivals  
Korea



Source: Global Agency Pro as of 04/17/21

# Maui by Quarter 2021 (cont.)

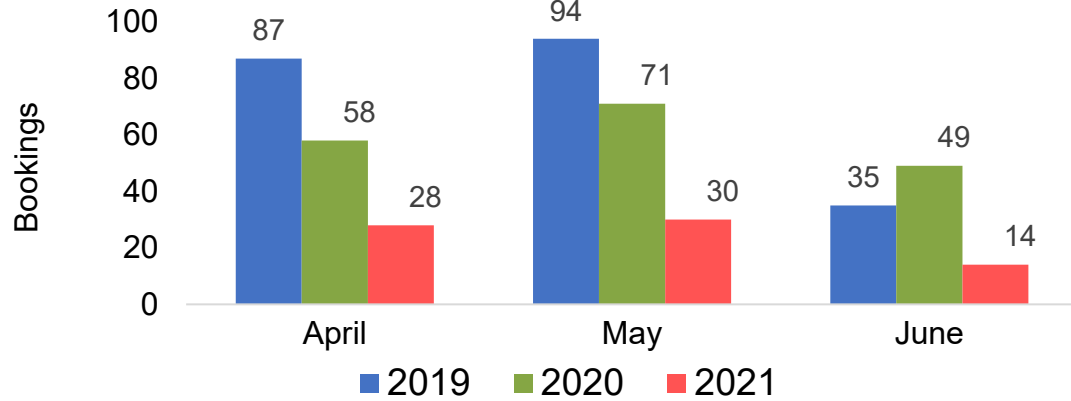
Travel Agency Booking Pace for Future Arrivals  
Australia



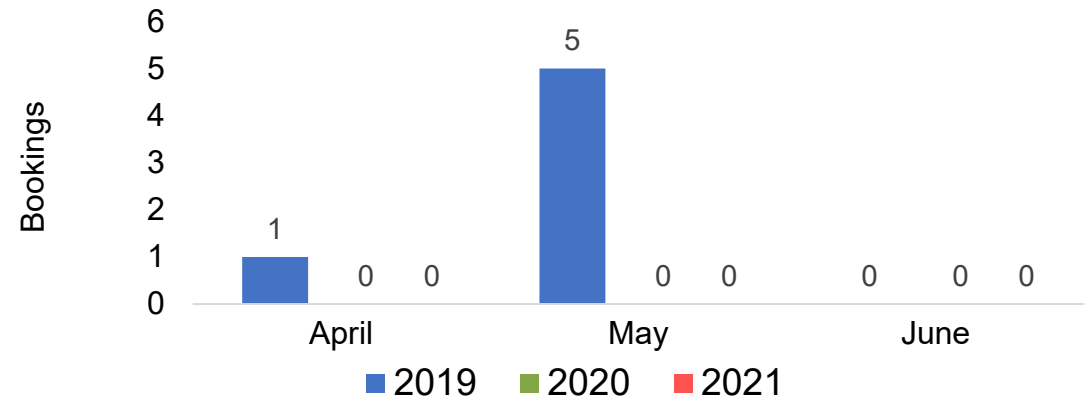
Source: Global Agency Pro as of 04/17/21

# Moloka'i by Month 2021

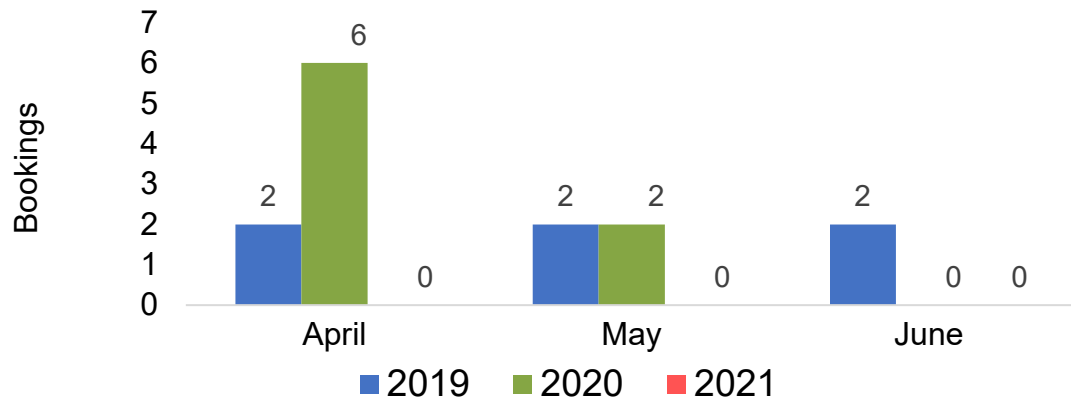
Travel Agency Booking Pace for Future Arrivals  
U.S.



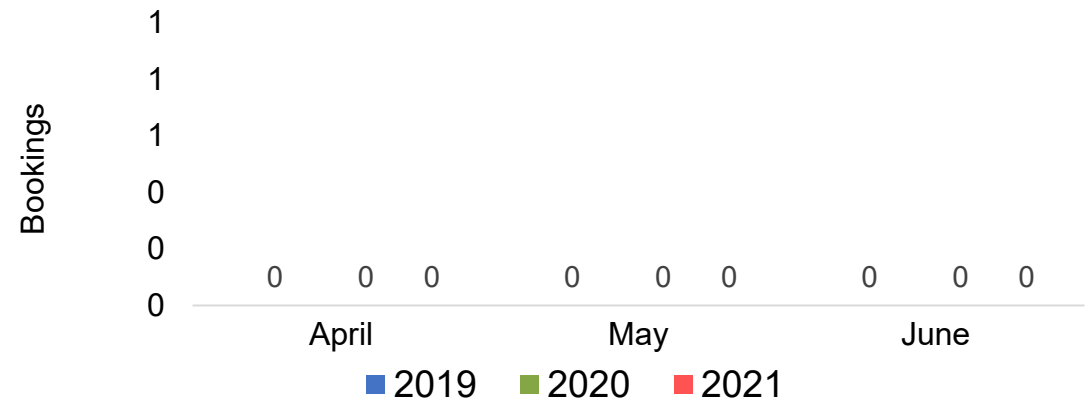
Travel Agency Booking Pace for Future Arrivals  
Japan



Travel Agency Booking Pace for Future Arrivals  
Canada

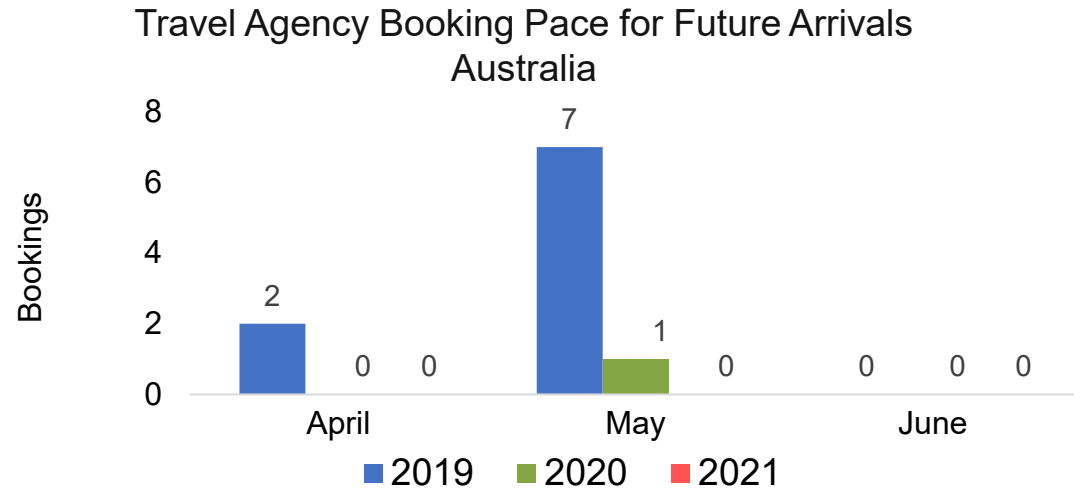


Travel Agency Booking Pace for Future Arrivals  
Korea



Source: Global Agency Pro as of 04/17/21

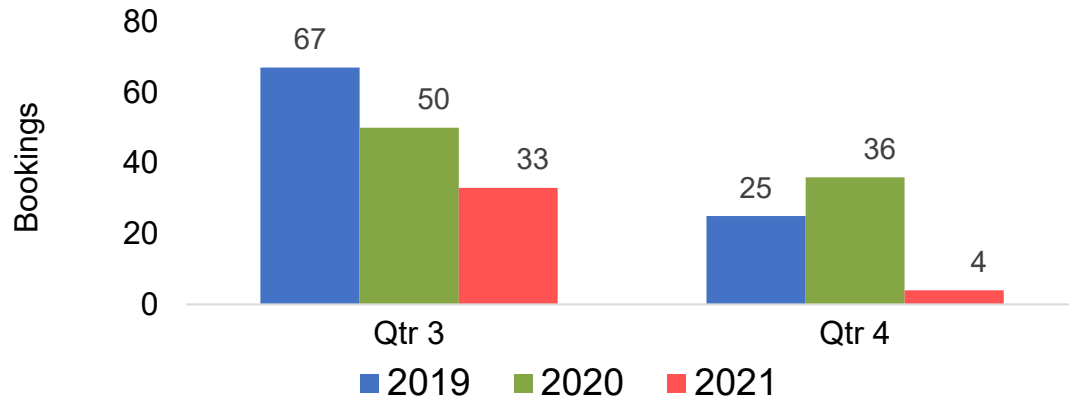
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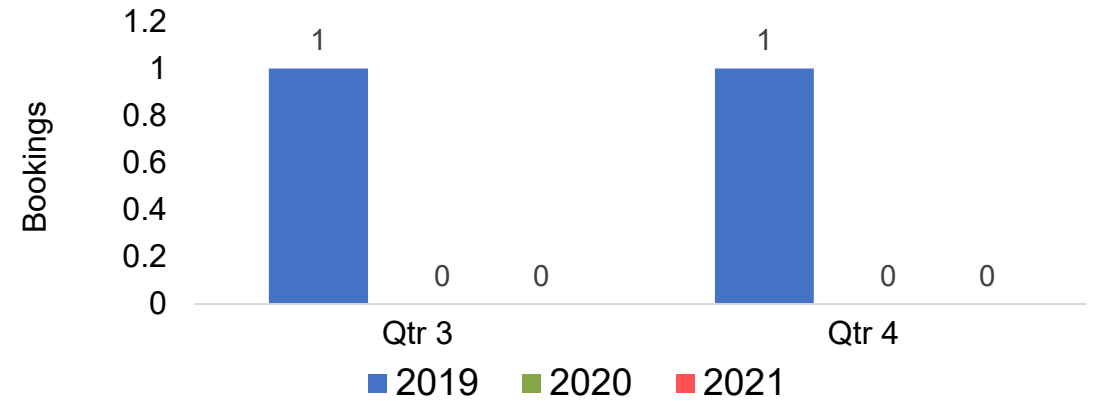
Source: Global Agency Pro as of 04/17/21

# Moloka'i by Quarter 2021

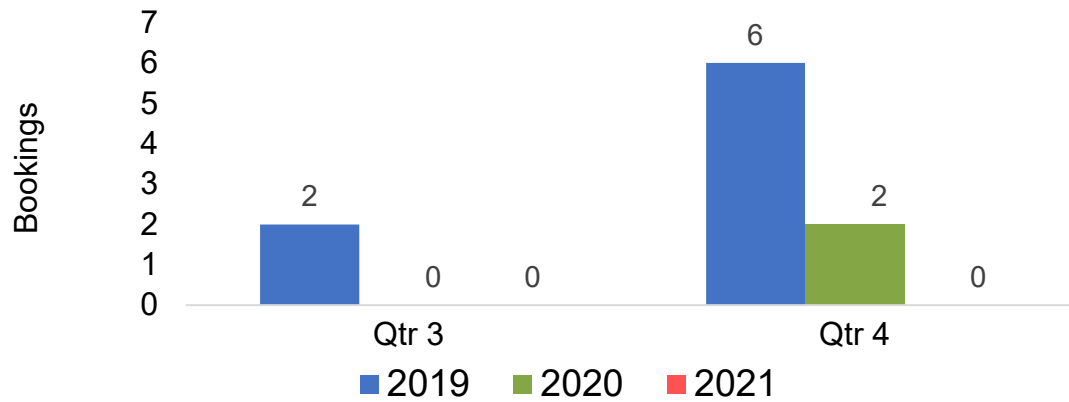
Travel Agency Booking Pace for Future Arrivals  
U.S.



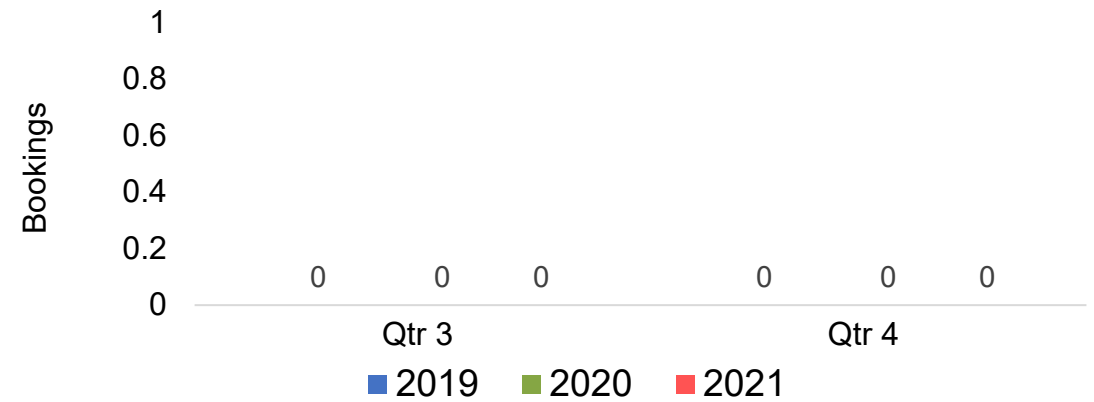
Travel Agency Booking Pace for Future Arrivals  
Japan



Travel Agency Booking Pace for Future Arrivals  
Canada



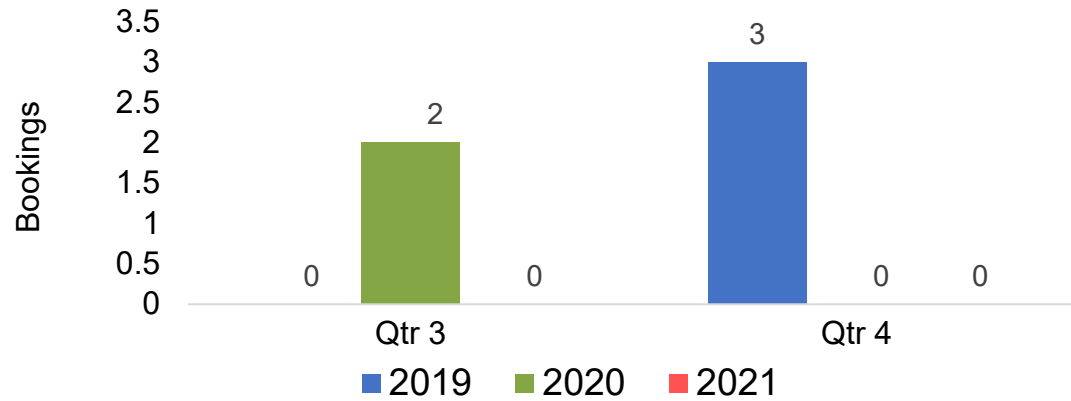
Travel Agency Booking Pace for Future Arrivals  
Korea



Source: Global Agency Pro as of 04/17/21

# Moloka'i by Quarter 2021 (cont.)

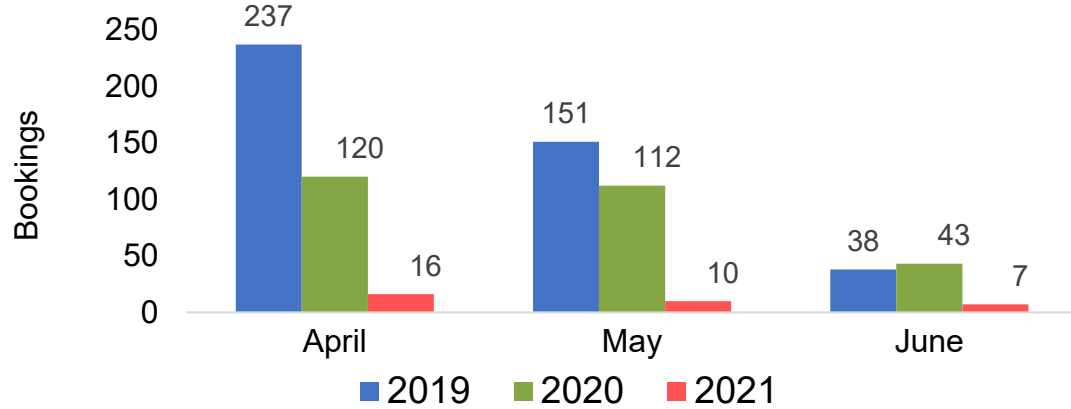
Travel Agency Booking Pace for Future Arrivals  
Australia



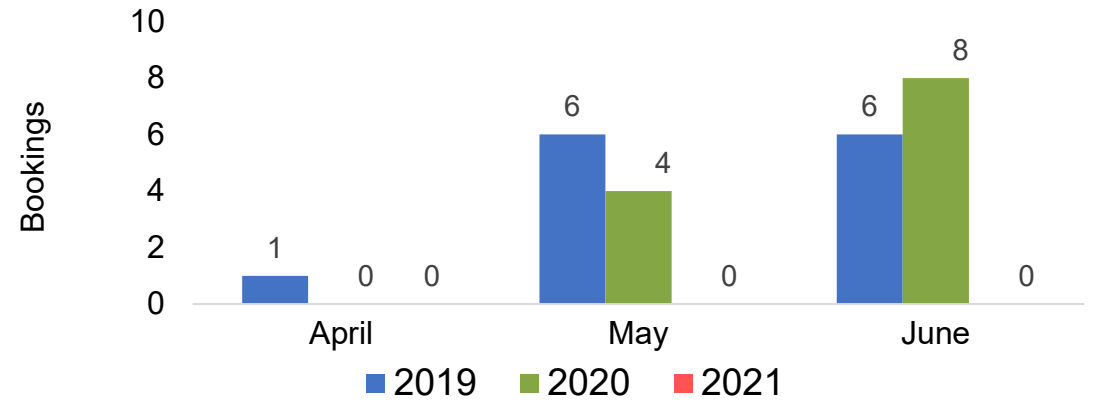
Source: Global Agency Pro as of 04/17/21

# Lānaʻi by Month 2021

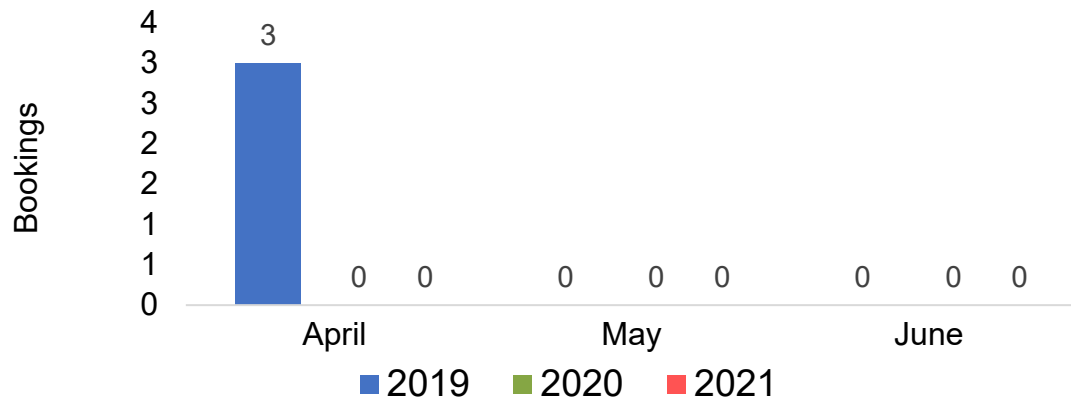
Travel Agency Booking Pace for Future Arrivals  
U.S.



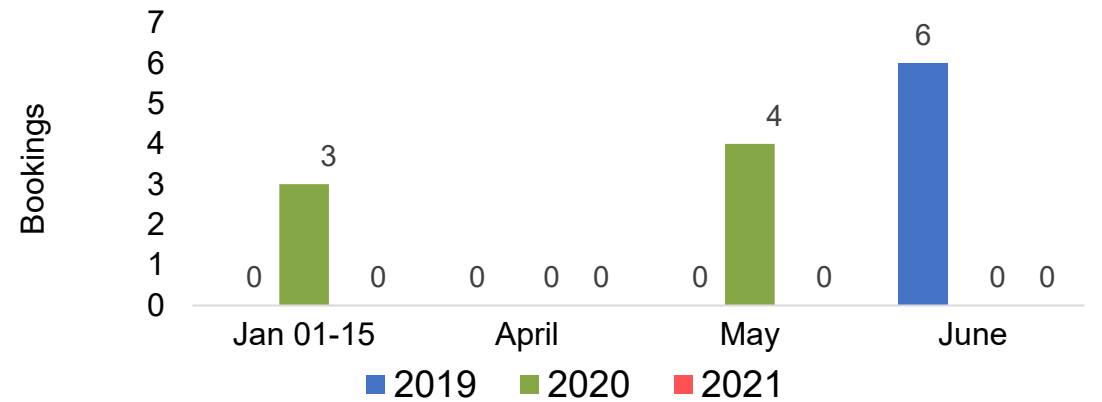
Travel Agency Booking Pace for Future Arrivals  
Japan



Travel Agency Booking Pace for Future Arrivals  
Canada



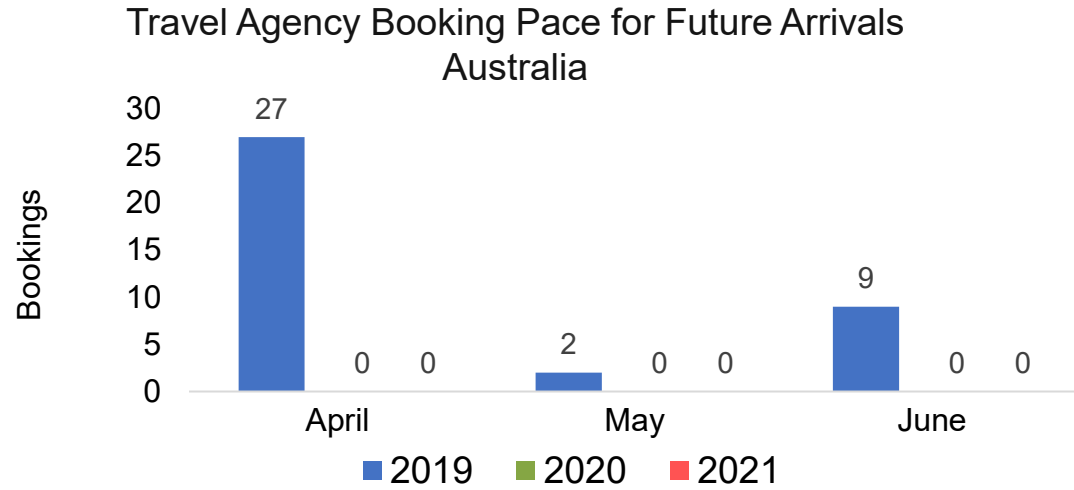
Travel Agency Booking Pace for Future Arrivals  
Korea



Source: Global Agency Pro as of 04/17/21



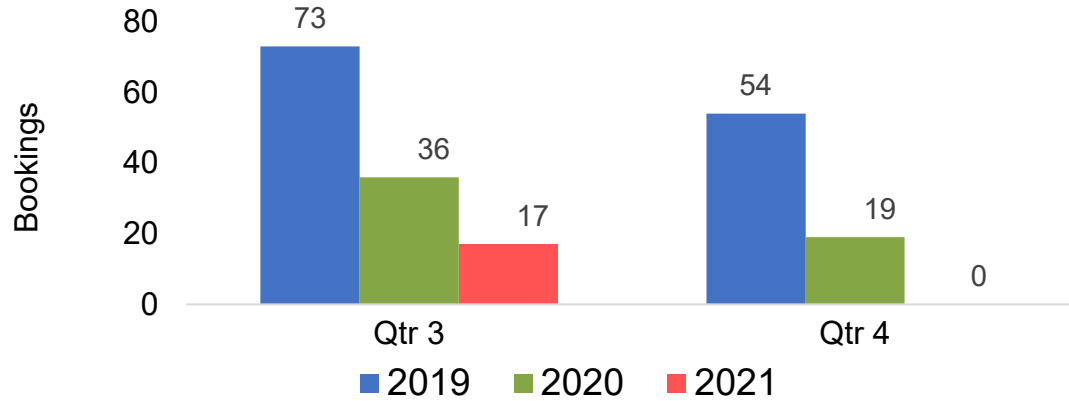
# Lānaʻi by Month 2021 (cont.)



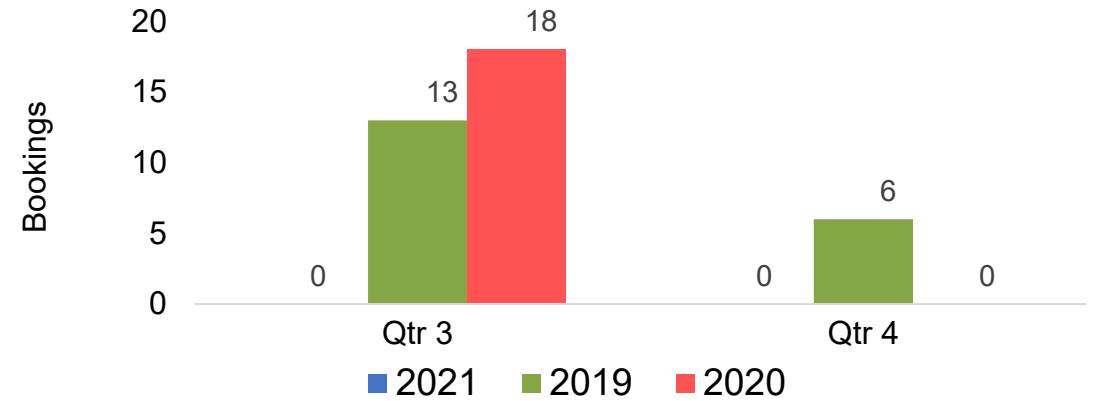
Source: Global Agency Pro as of 04/17/21

# Lānaʻi by Quarter 2021

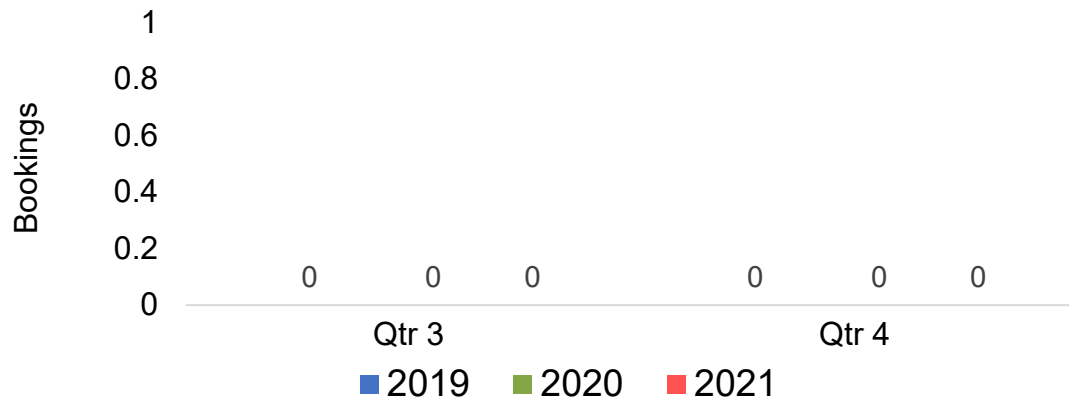
Travel Agency Booking Pace for Future Arrivals  
U.S.



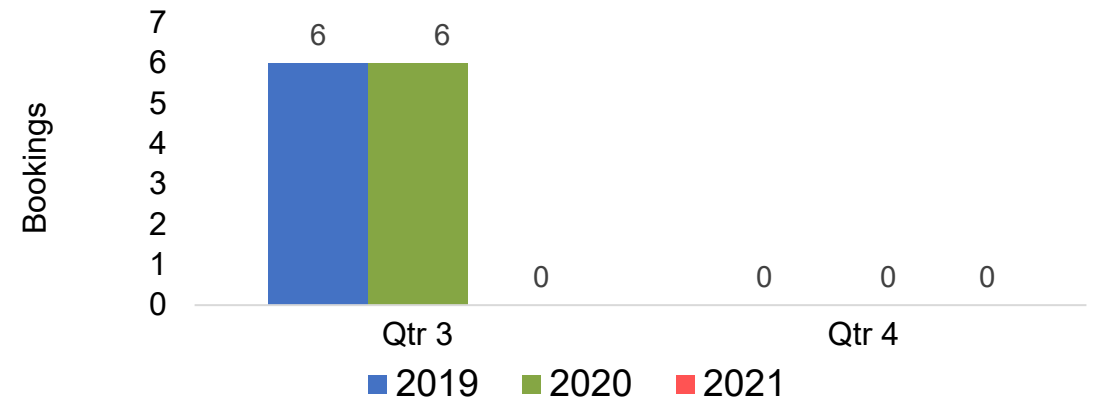
Travel Agency Booking Pace for Future Arrivals  
Japan



Travel Agency Booking Pace for Future Arrivals  
Canada

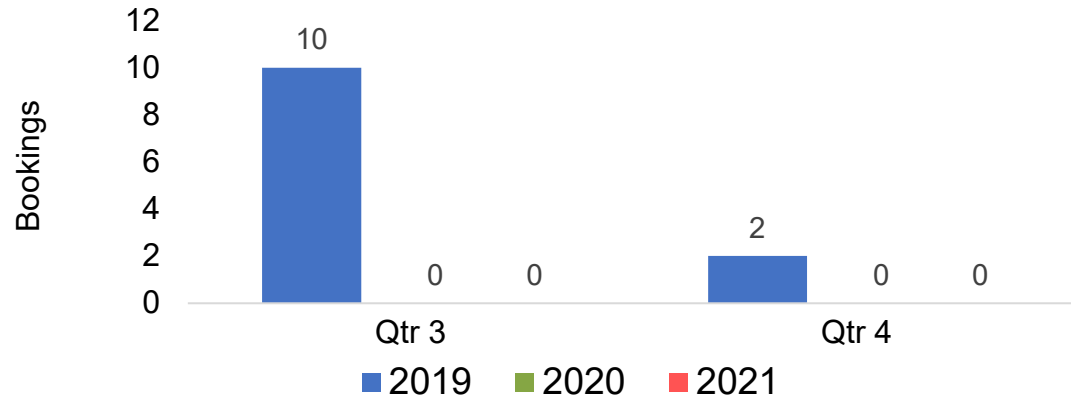


Travel Agency Booking Pace for Future Arrivals  
Korea



# Lānaʻi by Quarter 2021 (cont.)

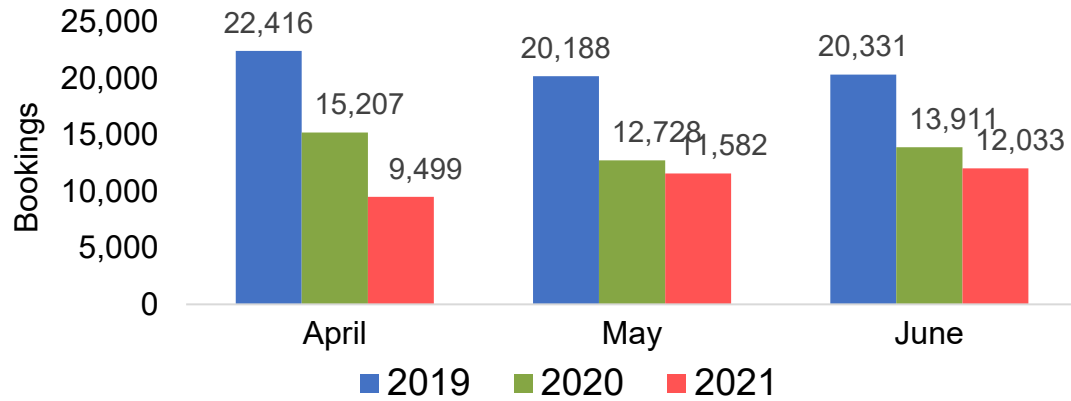
Travel Agency Booking Pace for Future Arrivals  
Australia



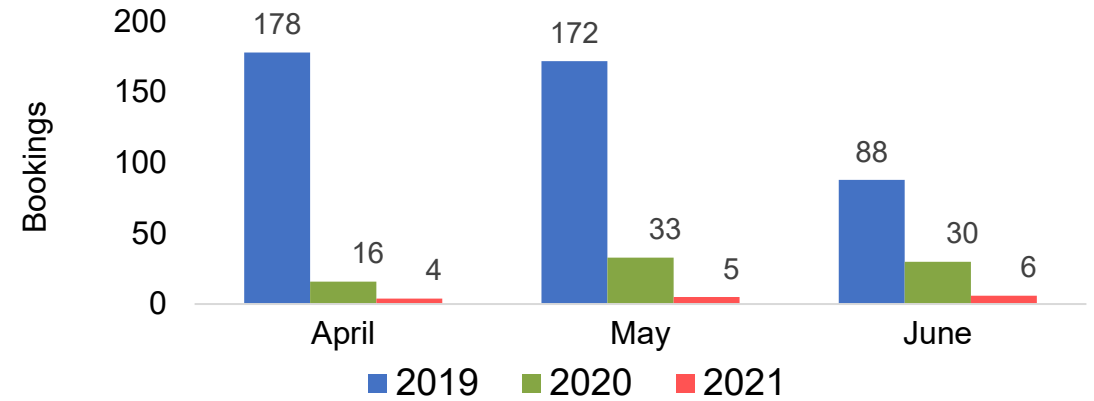
Source: Global Agency Pro as of 04/17/21

# Kaua'i by Month 2021

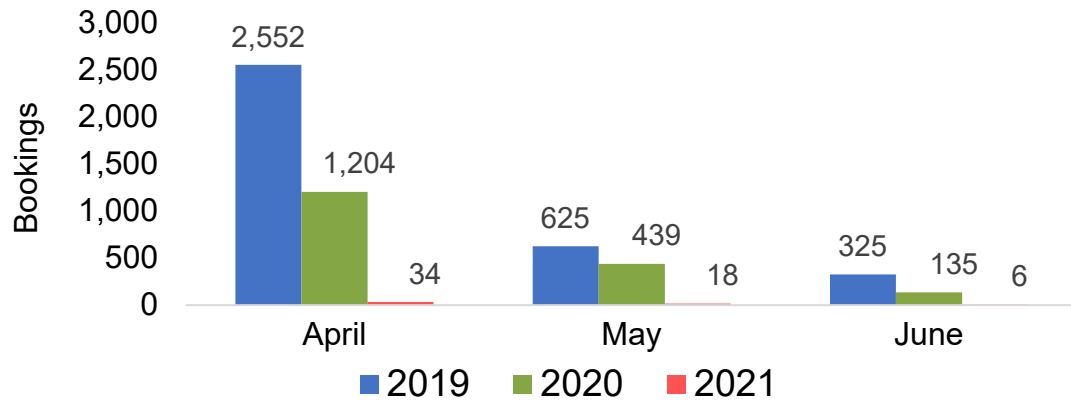
Travel Agency Booking Pace for Future Arrivals  
U.S.



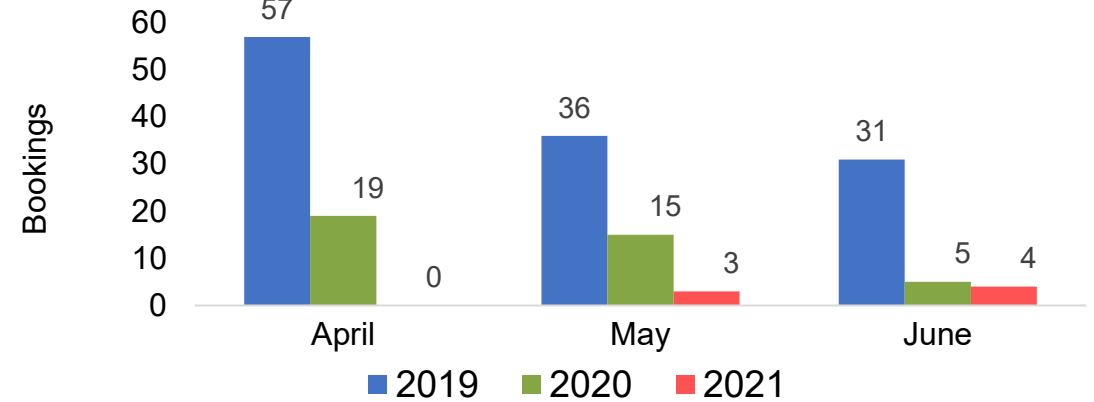
Travel Agency Booking Pace for Future Arrivals  
Japan



Travel Agency Booking Pace for Future Arrivals  
Canada

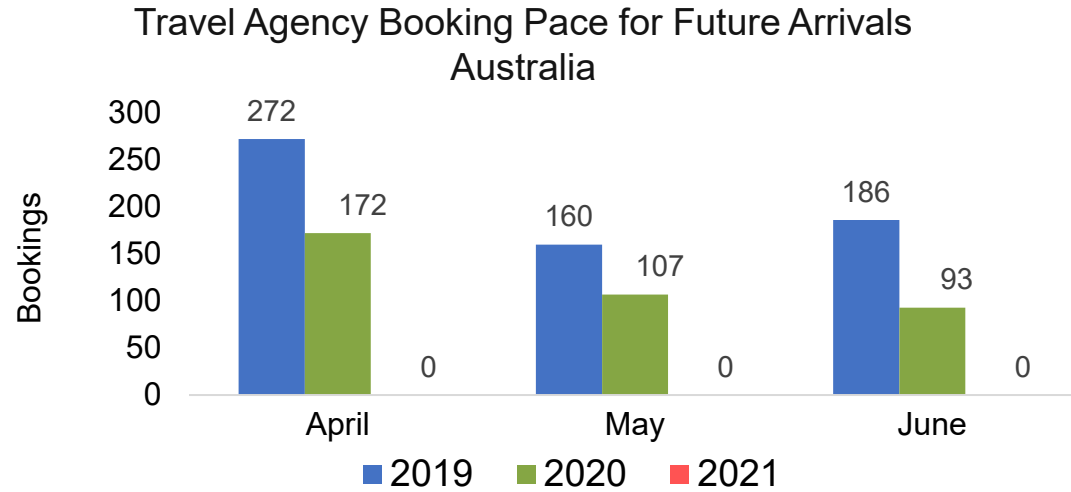


Travel Agency Booking Pace for Future Arrivals  
Korea



Source: Global Agency Pro as of 04/17/21

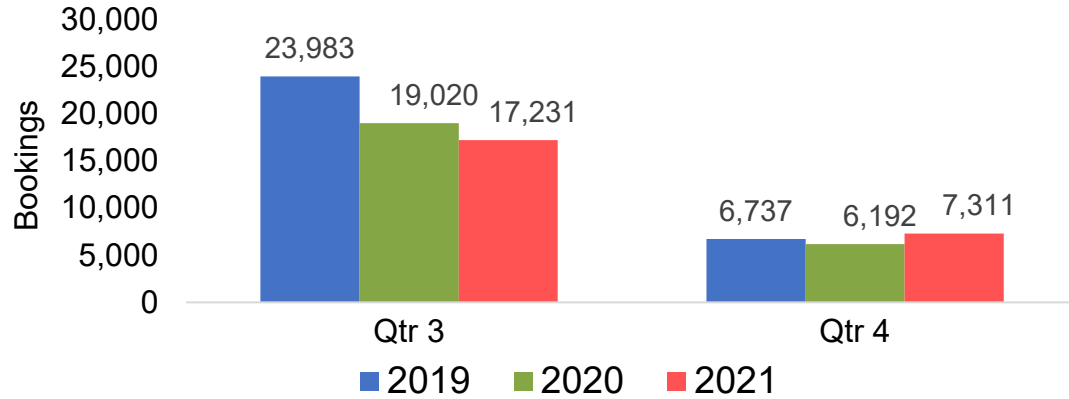
# Kaua'i by Month 2021 (cont.)



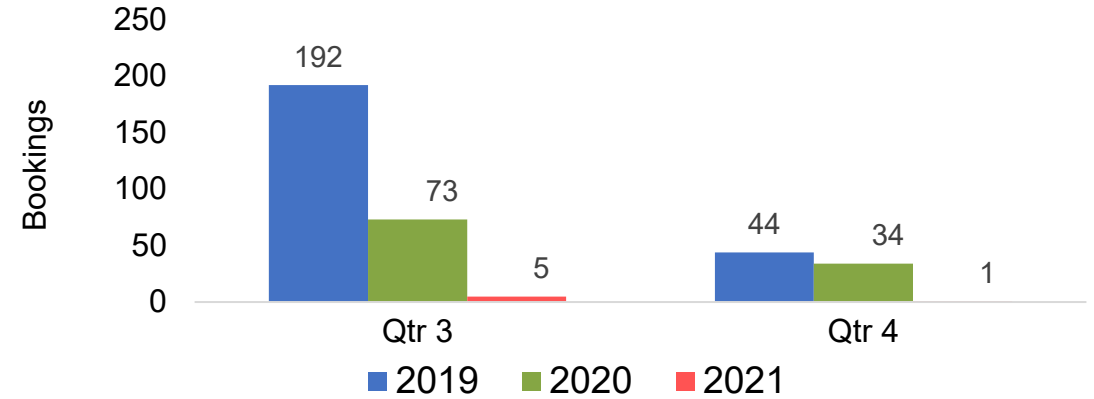
Source: Global Agency Pro as of 04/17/21

# Kaua'i by Quarter 2021

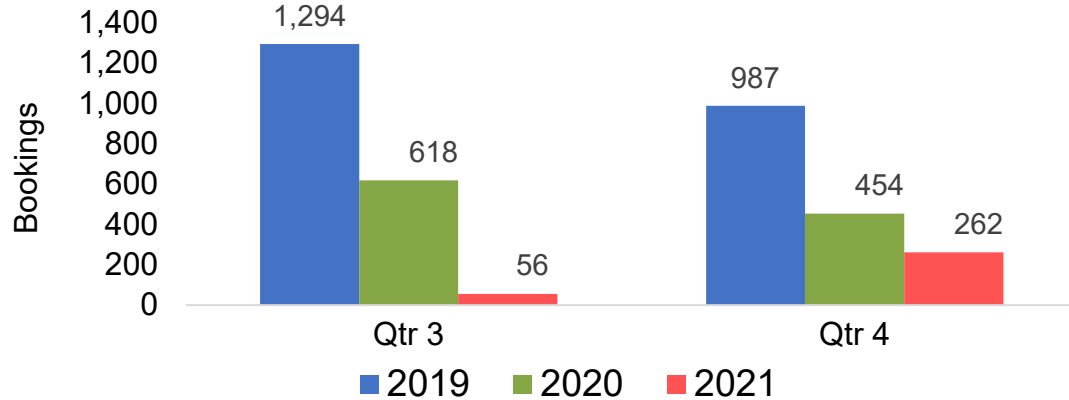
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U.S.



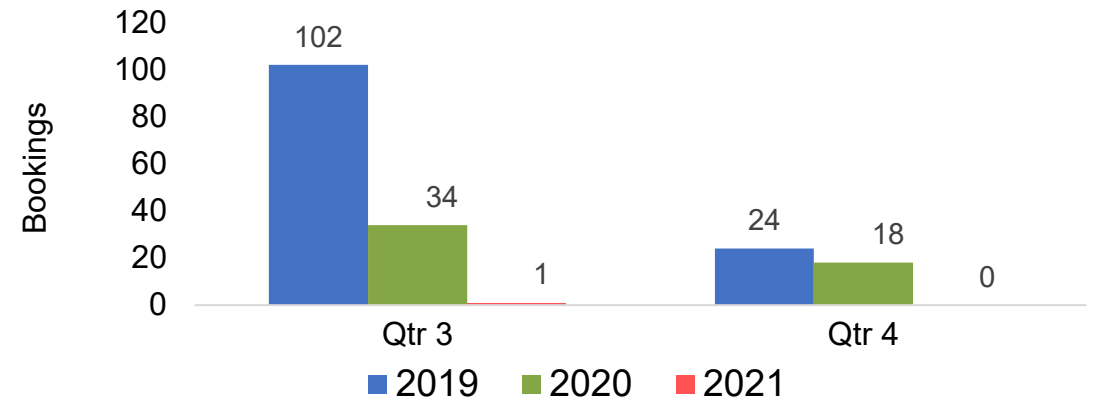
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Japan



Travel Agency Booking Pace for Future Arrivals  
Canada

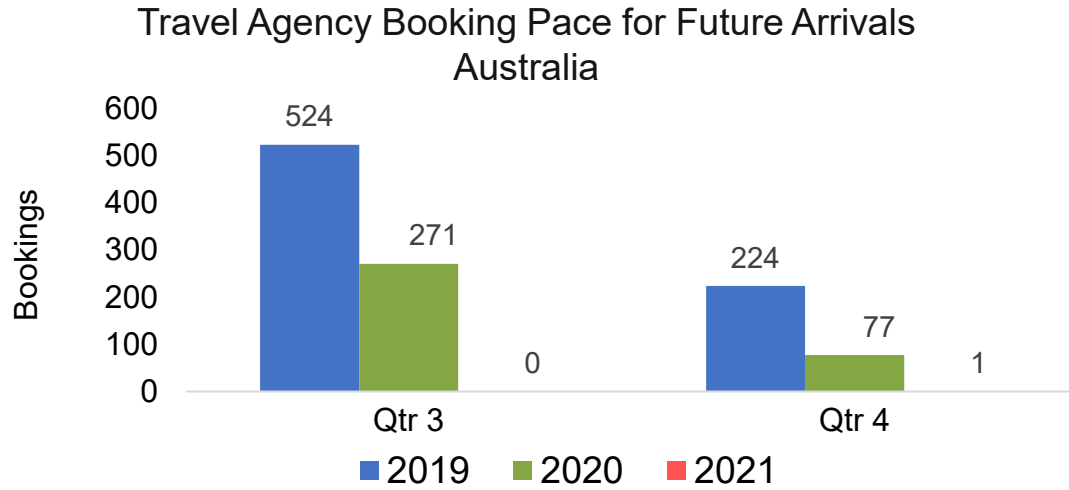


Travel Agency Booking Pace for Future Arrivals  
Korea



Source: Global Agency Pro as of 04/17/21

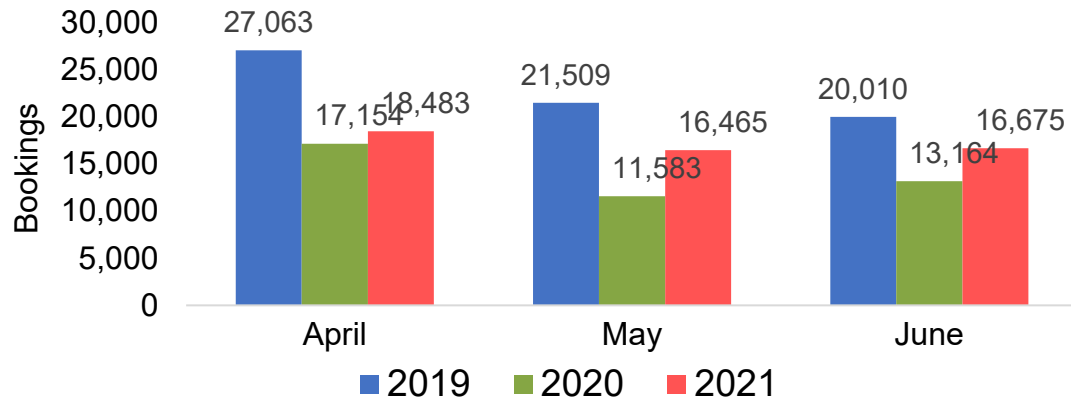
# Kaua'i by Quarter 2021 (cont.)



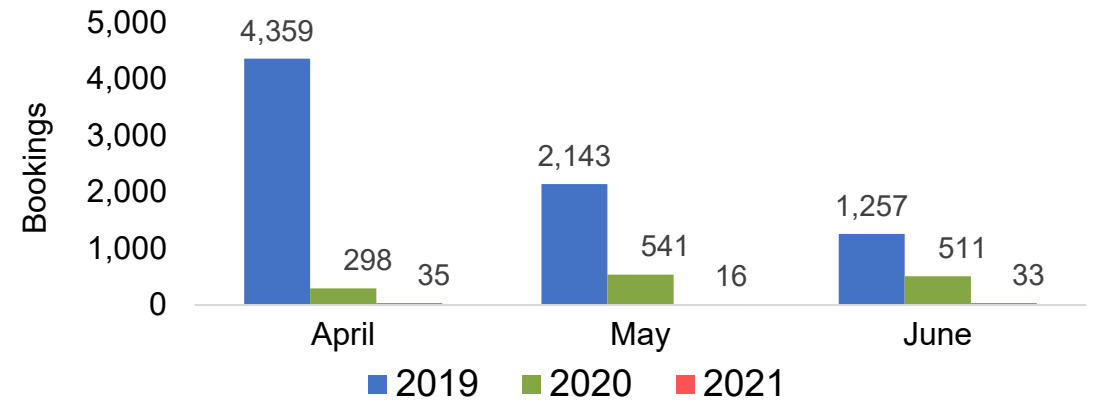
Source: Global Agency Pro as of 04/17/21

# Hawai'i Island by Month 2021

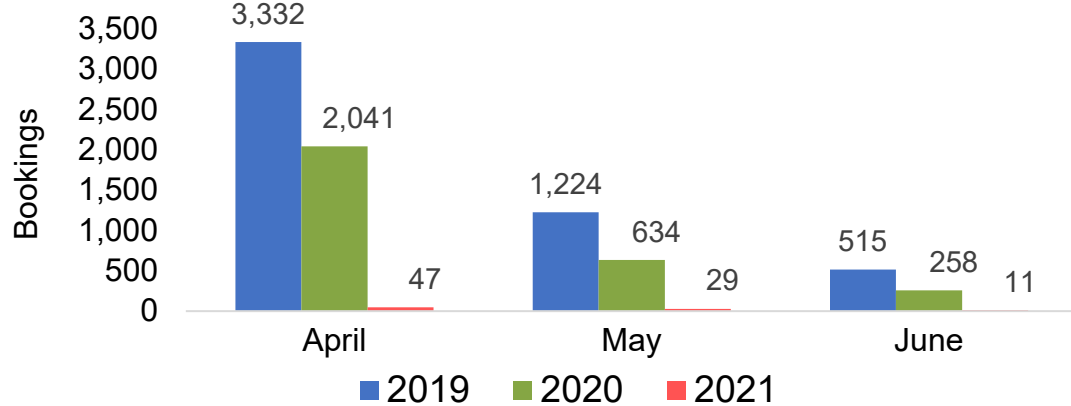
Travel Agency Booking Pace for Future Arrivals  
U.S.



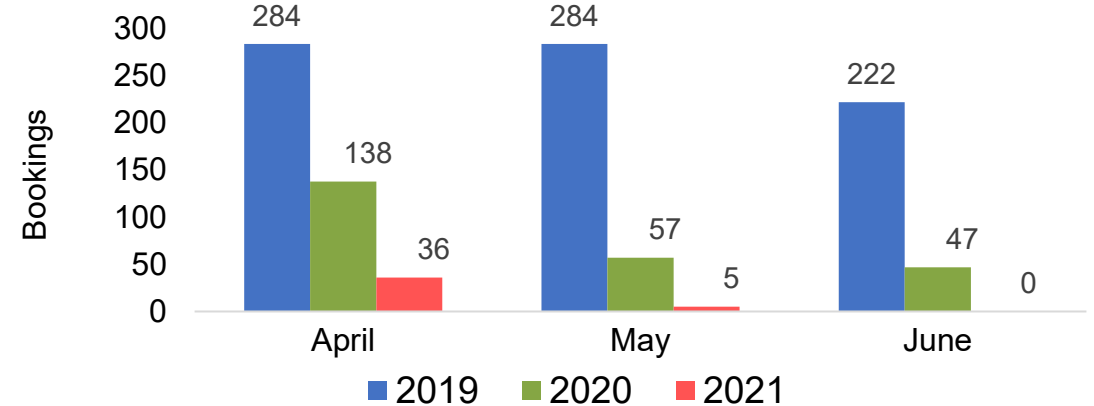
Travel Agency Booking Pace for Future Arrivals  
Japan



Travel Agency Booking Pace for Future Arrivals  
Canada



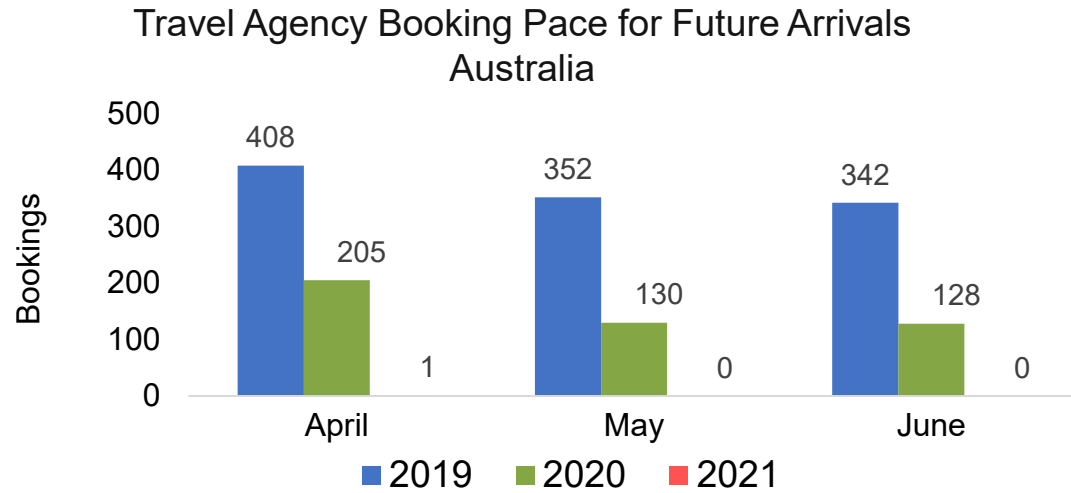
Travel Agency Booking Pace for Future Arrivals  
Korea



Source: Global Agency Pro as of 04/17/21



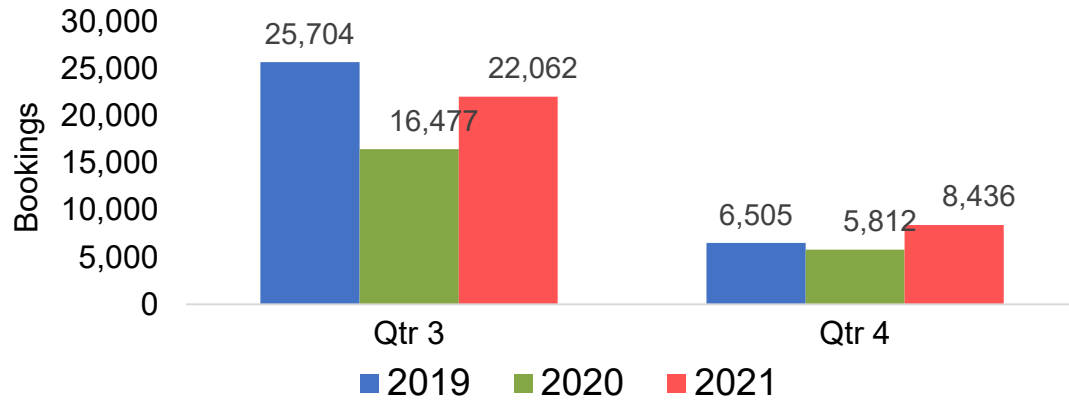
# Hawai'i Island by Month 2021 (cont.)



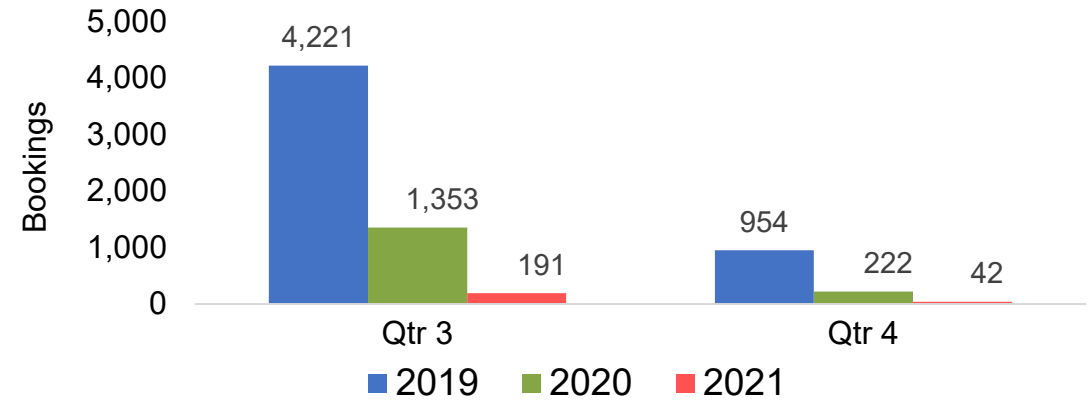
Source: Global Agency Pro as of 04/17/21

# Hawai'i Island by Quarter 2021

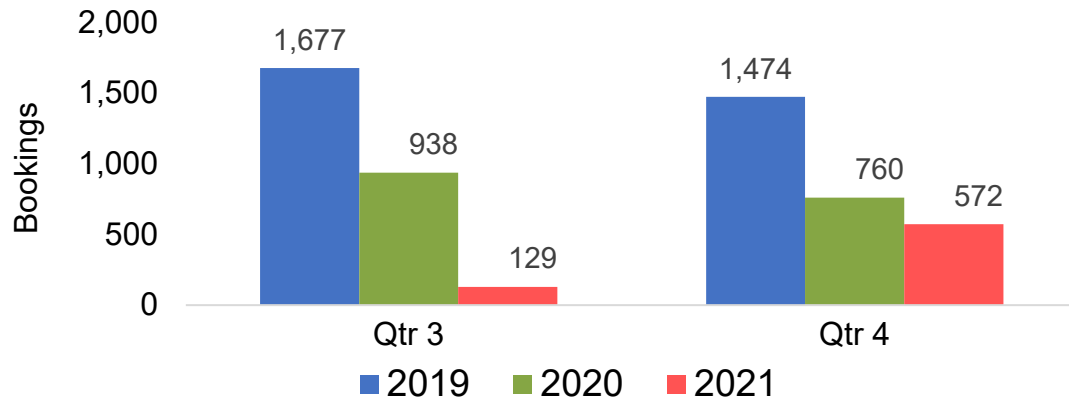
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U.S.



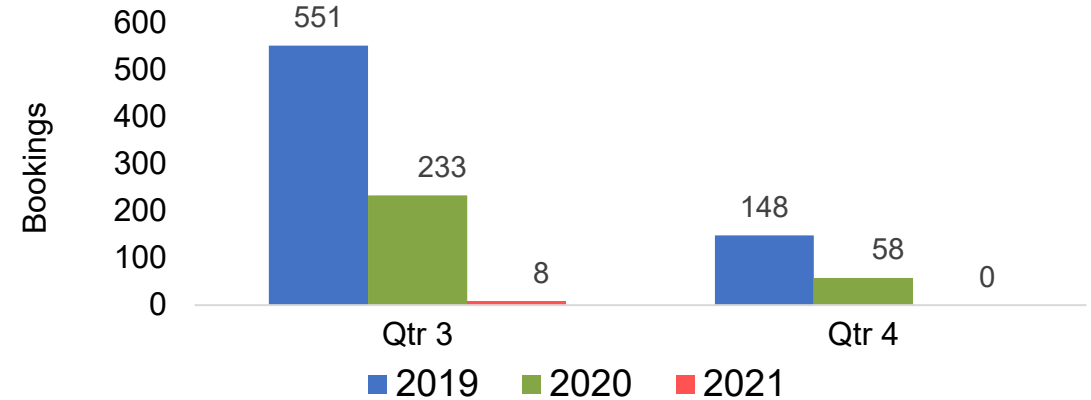
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Travel Agency Booking Pace for Future Arrivals  
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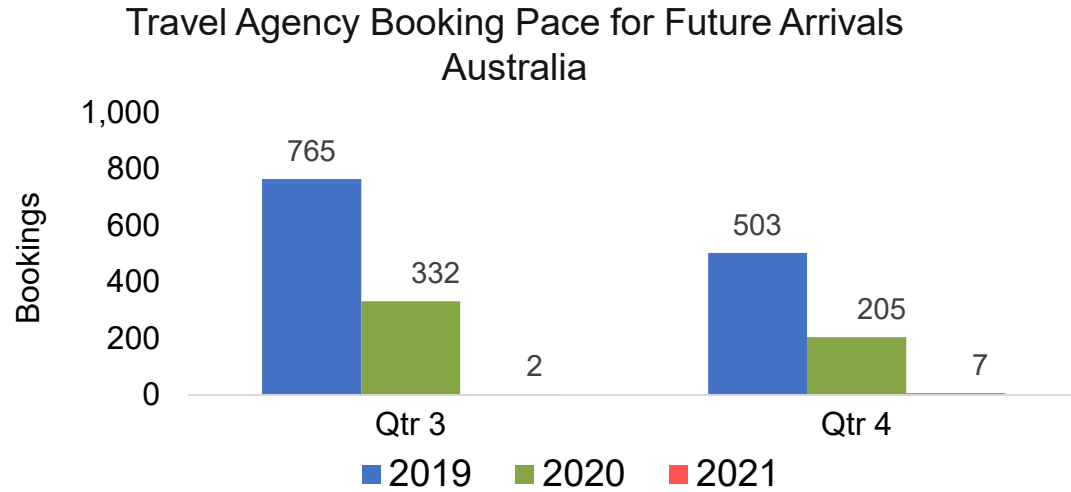


Travel Agency Booking Pace for Future Arrivals  
Korea



Source: Global Agency Pro as of 04/17/21

# Hawai'i Island by Quarter 2021 (cont.)



Source: Global Agency Pro as of 04/17/21

## **Agenda Item #4:**

TravelTrak America Survey Results  
By OmniTrak

# 2021: Unflattening the Curve

*Travel insights from Omnitrak's TravelTrakAmerica & Learnings from Other Destinations*

*Chris Kam, President, Omnitrak Group, Inc.*

Hawai'i Tourism Authority Marketing Standing Committee

April 28, 2021

# What's the **Big Idea**?

- 1** Travel demand is returning, and Avid Travelers are shopping.
- 2** Destinations which maintained a marketing presence in the past year reaped benefits.
- 3** An idea for a potential Destination Branding Re-think

# Omnitrak TravelTrakAmerica Background

## Target Audience

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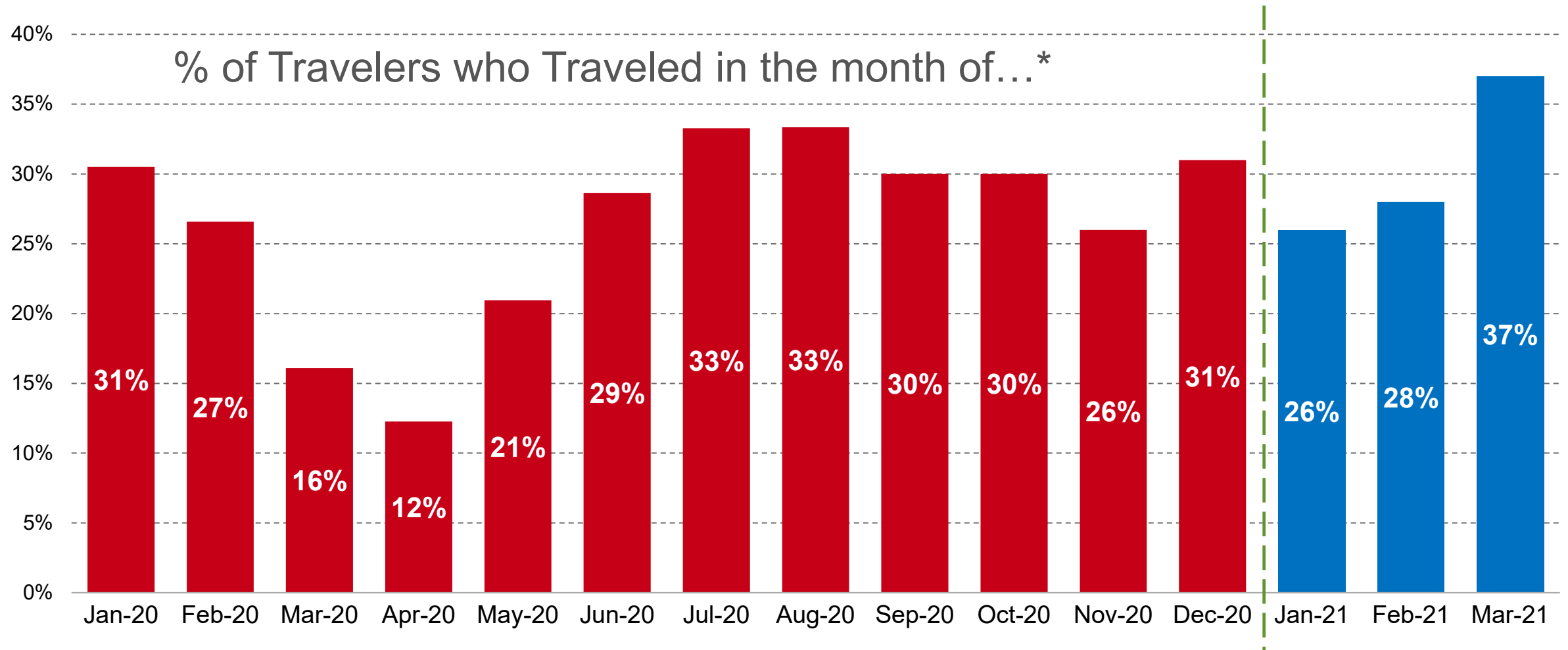
- US Households who traveled at least once in the past 12 months:
  - Weighted demographically (region, age, income, household size, marital status) to reflect the characteristics of US households.

## Methodology/Timeframe

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- Omnitrak Group uses a U.S. panel provider to manage sample for TravelTrakAmerica
- Monthly invitations are sent to representative households; quotas are set for age, income, and region
- Data collection focuses on travel taken during the past month
- Typically, fielding runs two-to-three weeks and starts early in the month
- Data are collected monthly and published quarterly

# People are traveling....

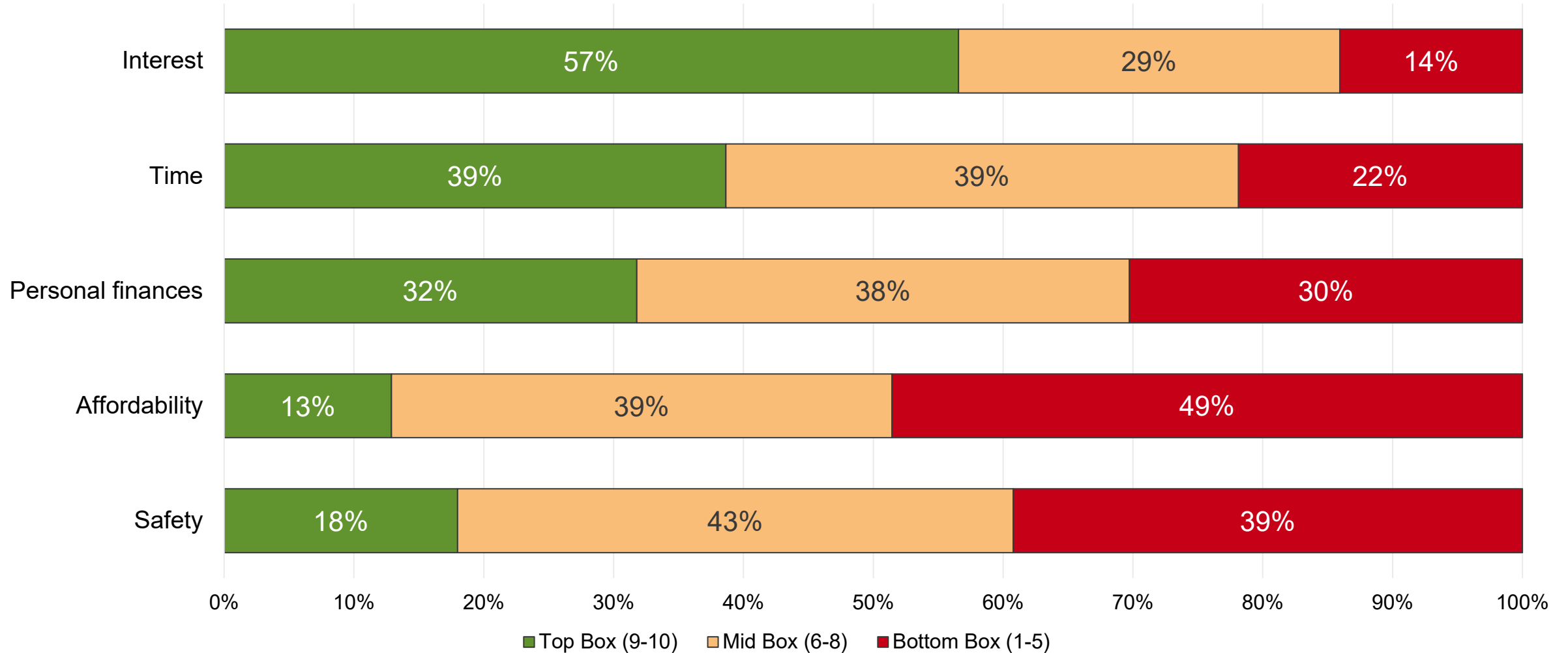


Source: TravelTrakAmerica  
www.omnitrakgroup.com

\*Preliminary

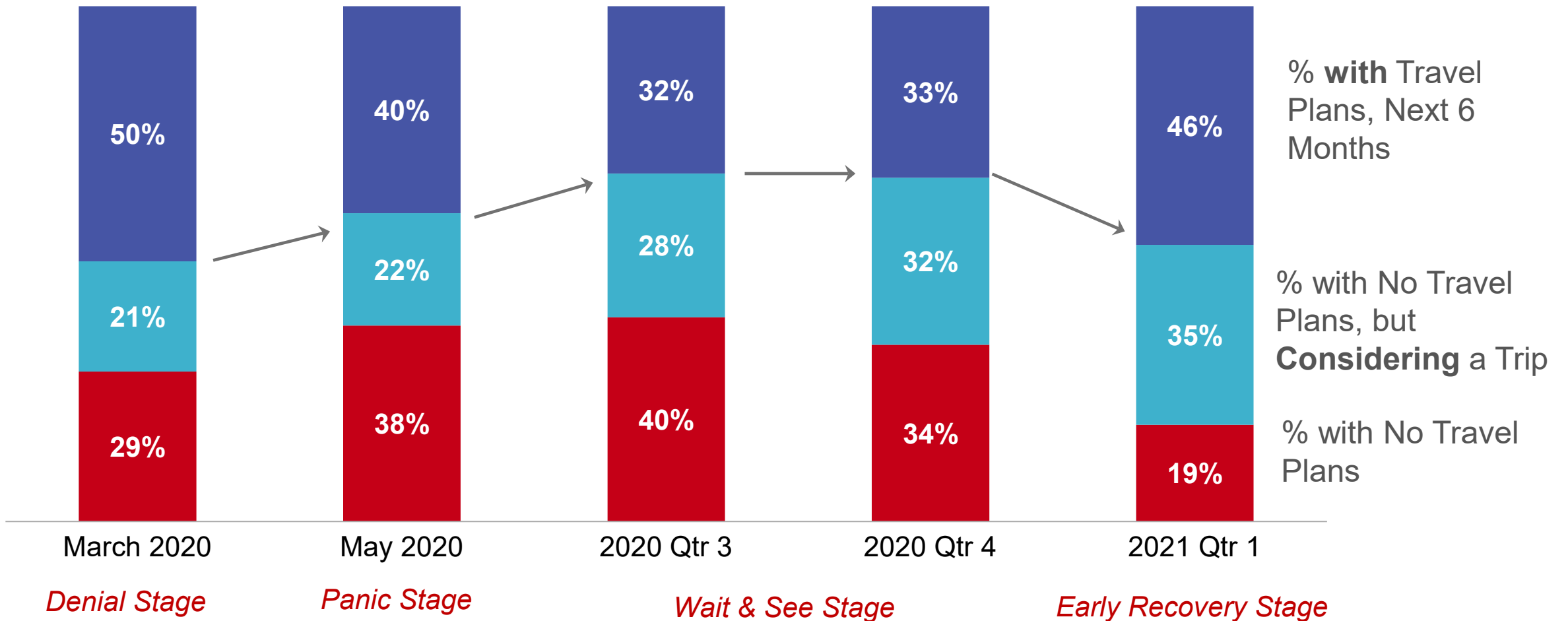


# Traveler Sentiment ...



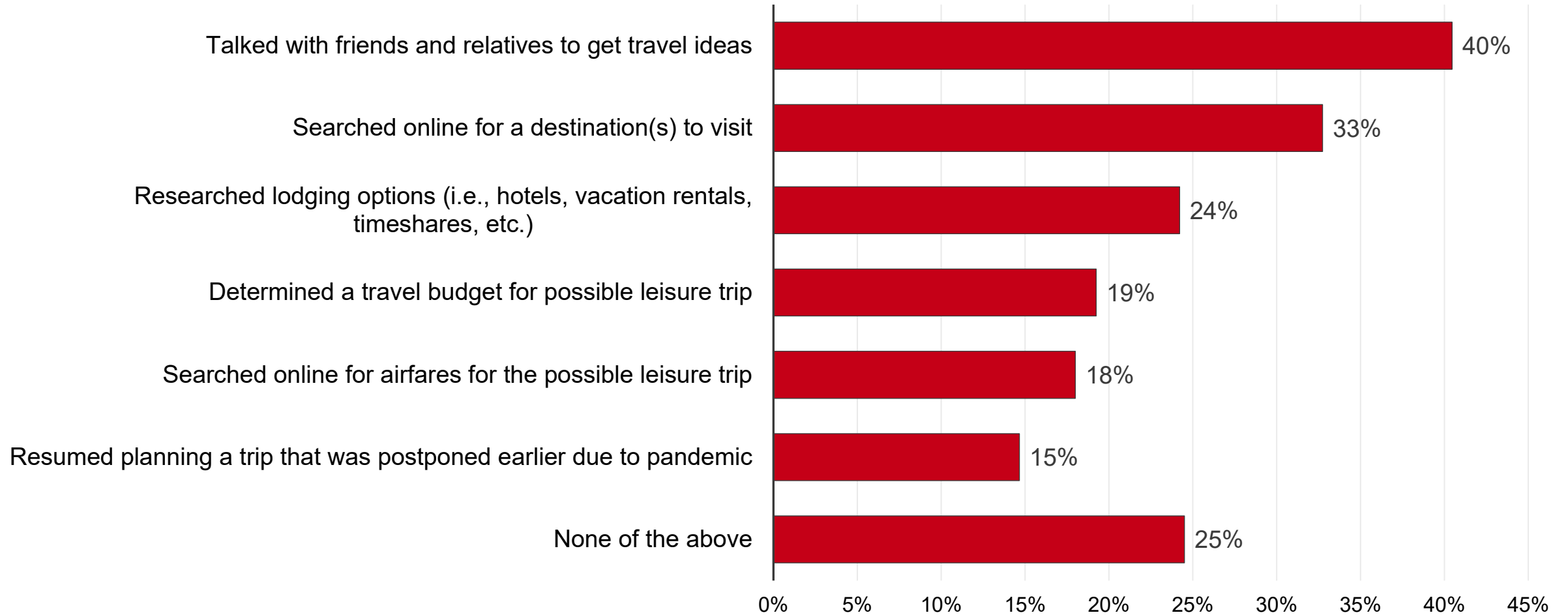
Source: TravelTrakAmerica, 2021 Q1 (Prelim)  
[www.omnitrakgroup.com](http://www.omnitrakgroup.com)

# 2021 Early Signs of Recovery.....



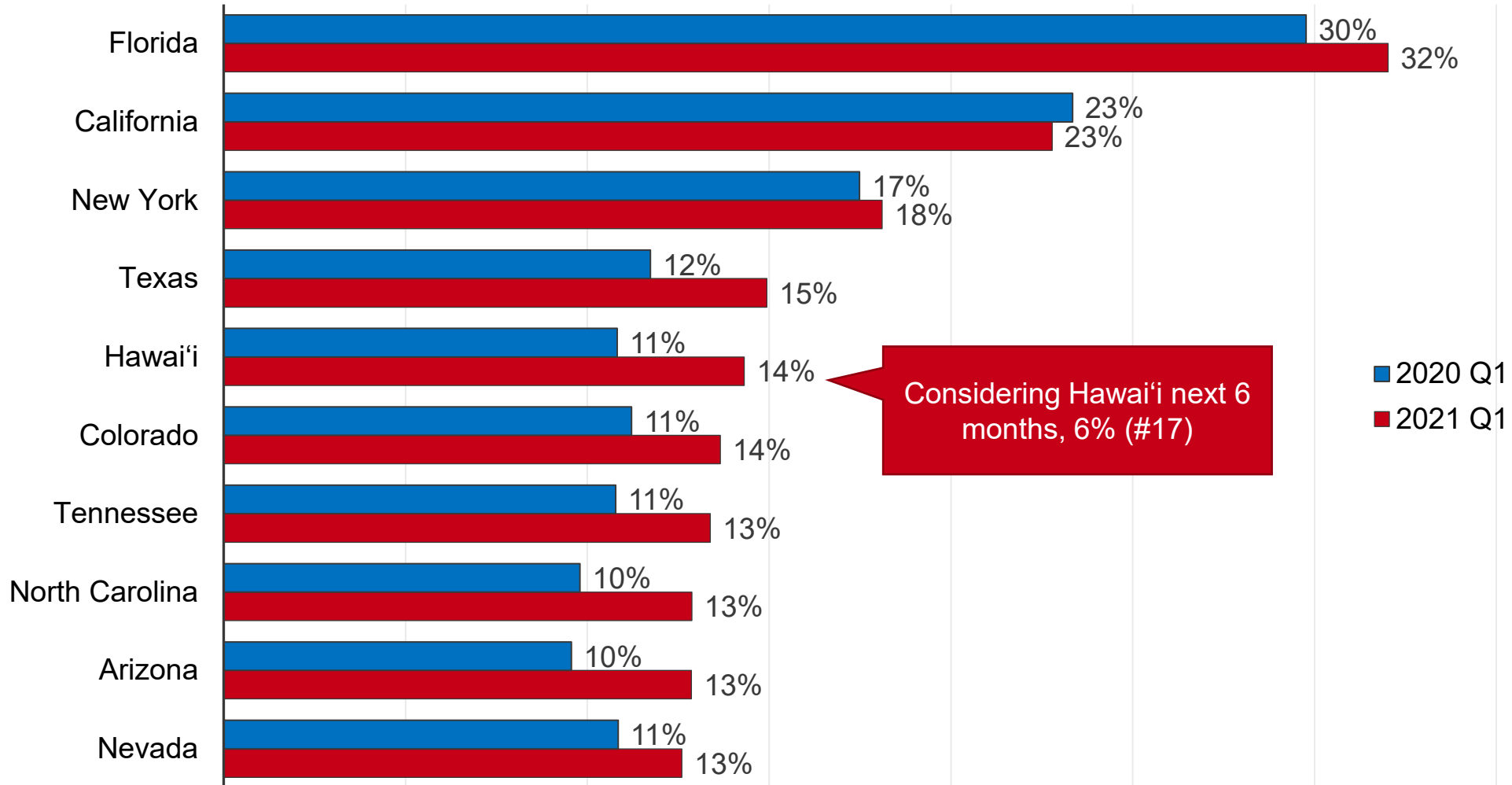
Source: TravelTrakAmerica  
www.omnitrakgroup.com

# Travelers Considering a Trip have ...



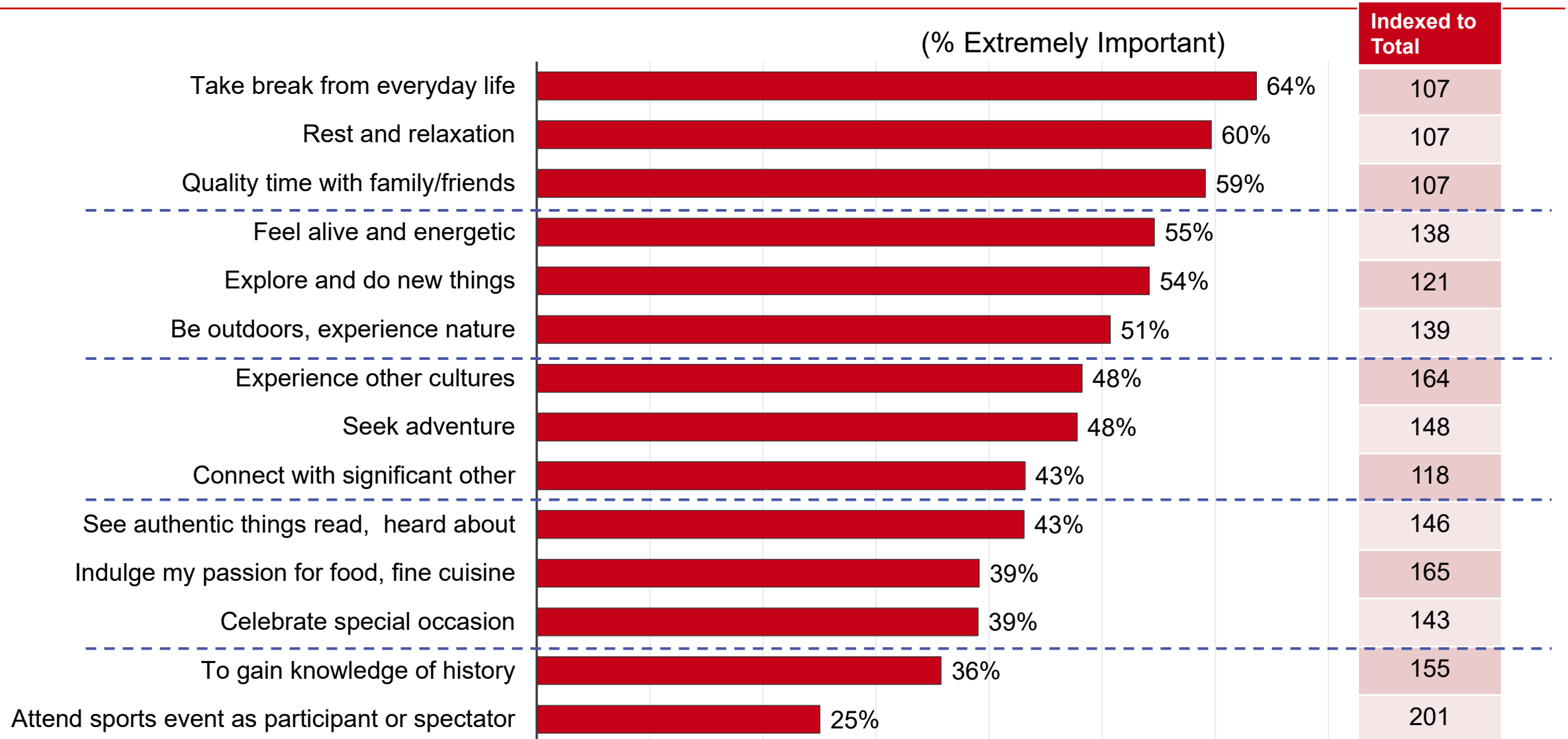
Source: TravelTrakAmerica, 2021 Q1 (Prelim)  
www.omnitrakgroup.com

# Top states considering visiting next two years...



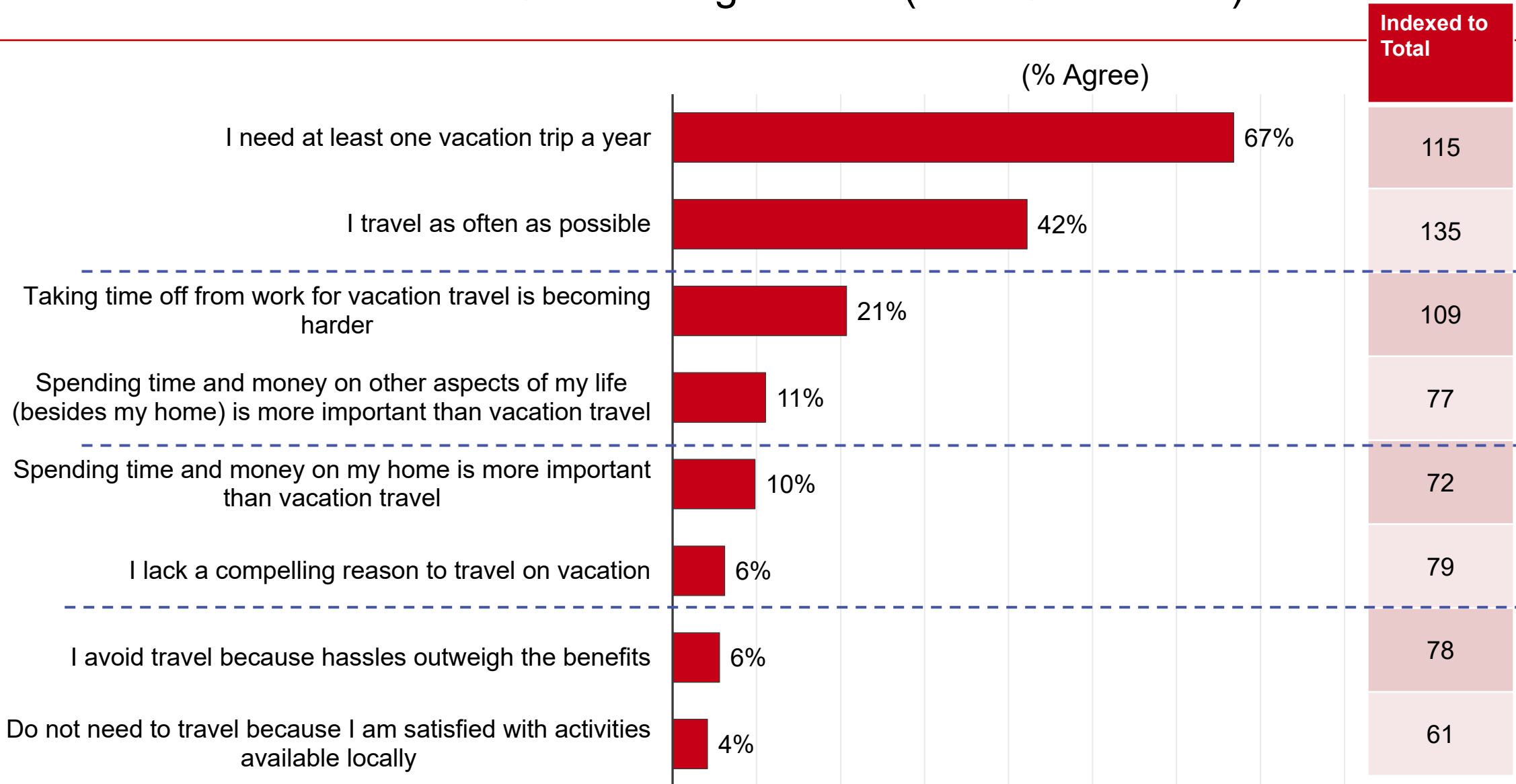
Source: TravelTrakAmerica,  
2020/2021 Q1 data (Prelim)  
[www.omnitrakgroup.com](http://www.omnitrakgroup.com)

# Travel Motivations of Travelers Considering Hawai'i (Next Six Months)...



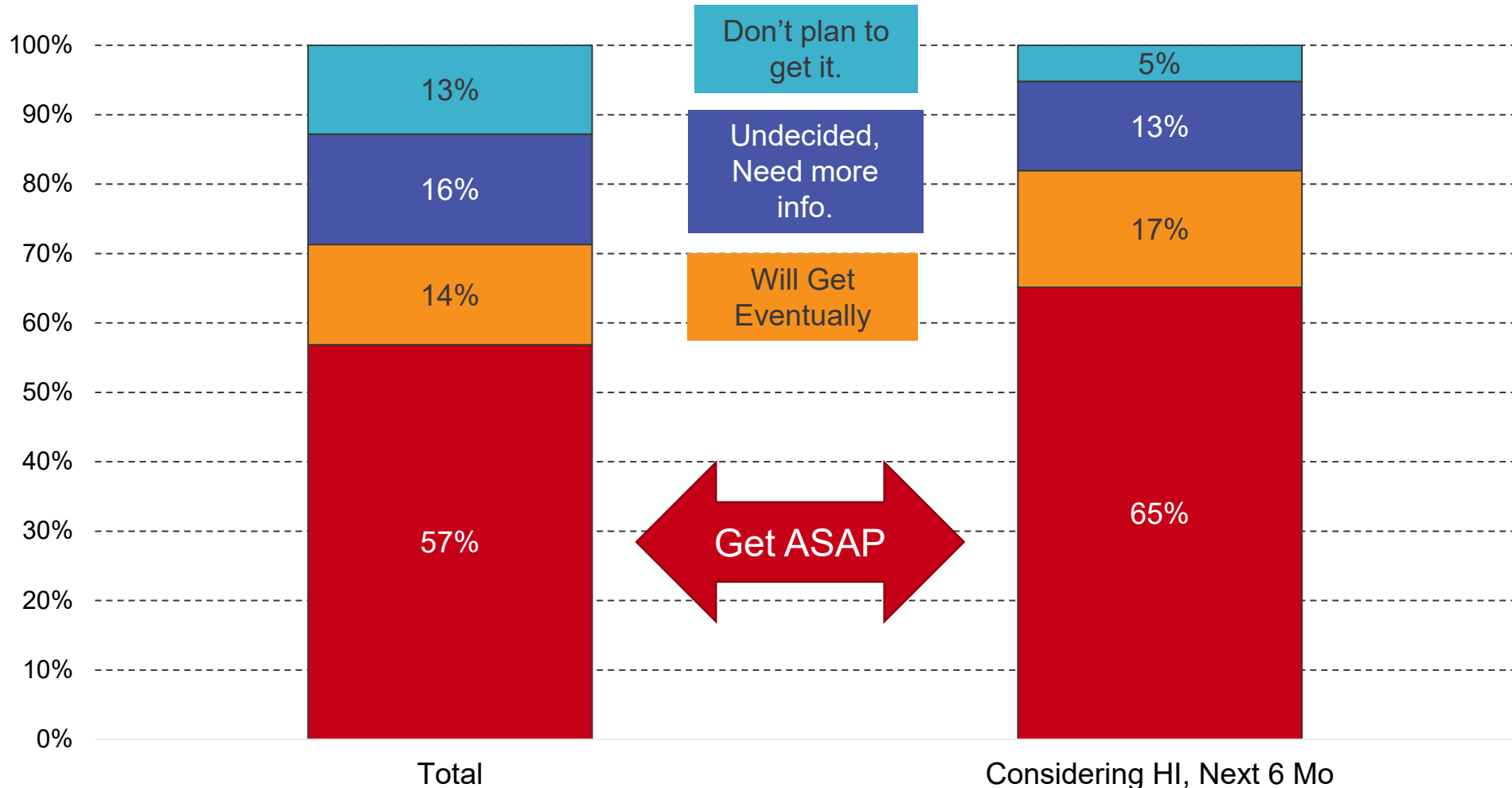
Source: TravelTrakAmerica, 2021 Q1 data (Prelim)  
www.omnitrakgroup.com

# Travel Attitudes of Travelers Considering Hawai'i (Next Six Months)...



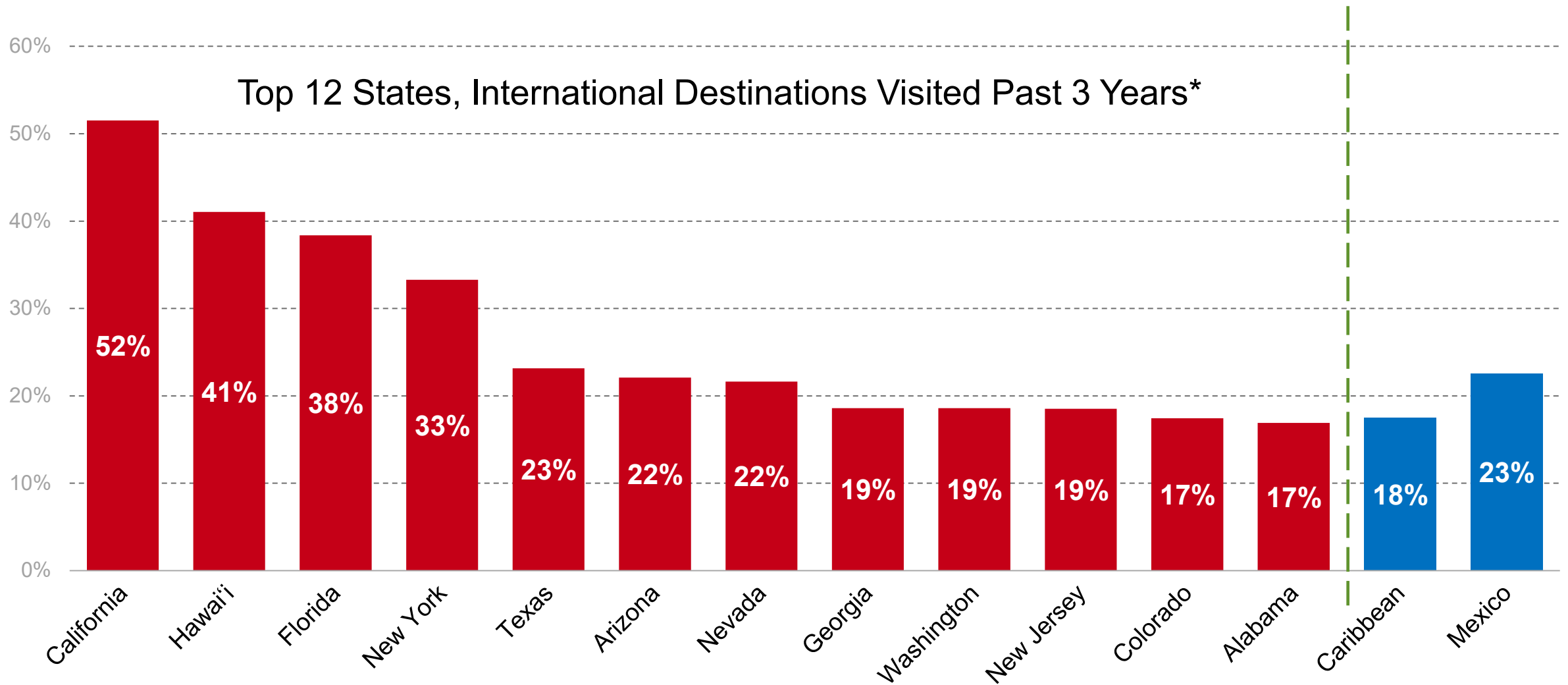
Source: TravelTrakAmerica, 2021 Q1 data (Prelim)  
www.omnitrakgroup.com

# Vaccination Acceptance, Considering Hawai'i next 6 Months



Source: TravelTrakAmerica, 2021 Q1 data (Prelim)  
www.omnitrakgroup.com

# Travelgraphics, Considering Hawai'i next 6 months (% visited)...

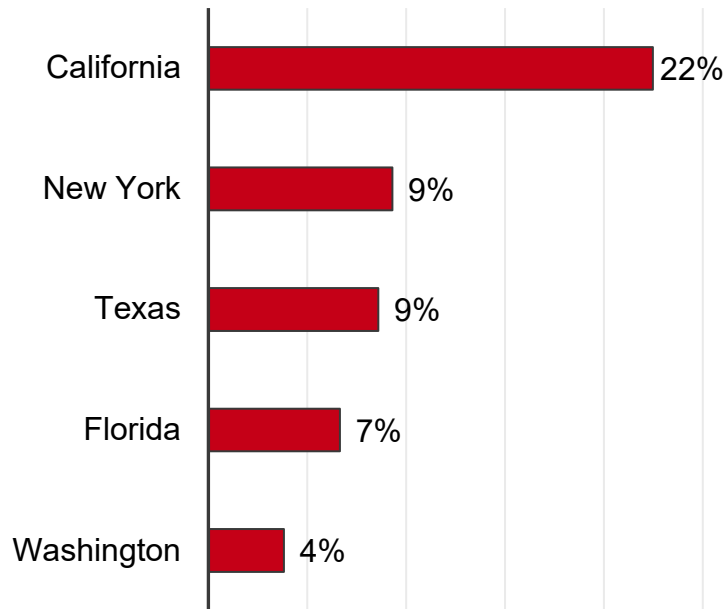


Source: TravelTrakAmerica, 2021 Q1 data (Prelim)  
www.omnitrakgroup.com

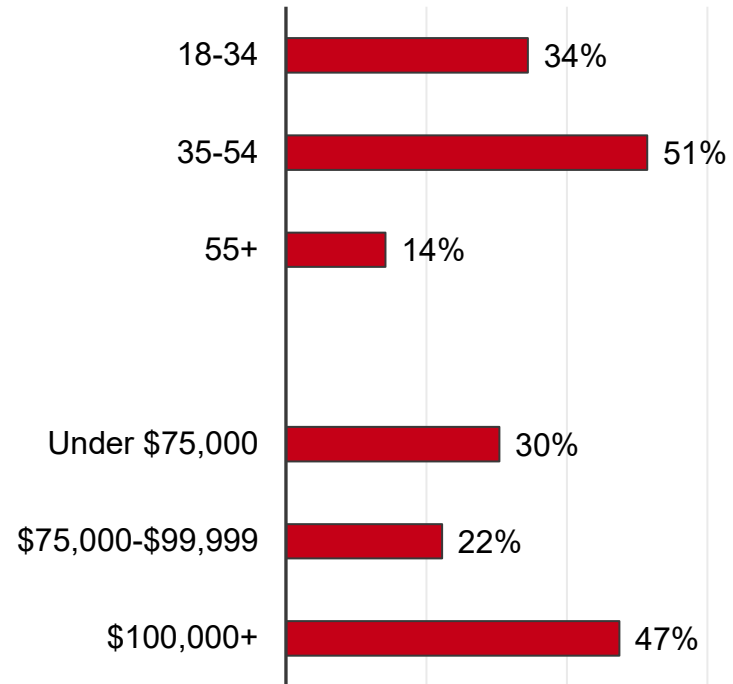


# Demographics, Considering Hawai'i next 6 months (% of total)...

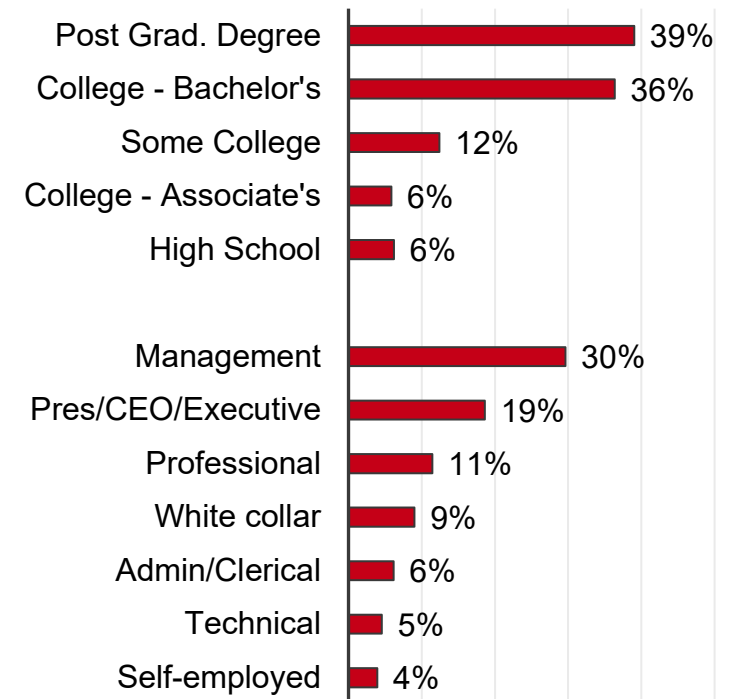
Source markets:  
Top 5 States of Residence



Age & Annual HH Income



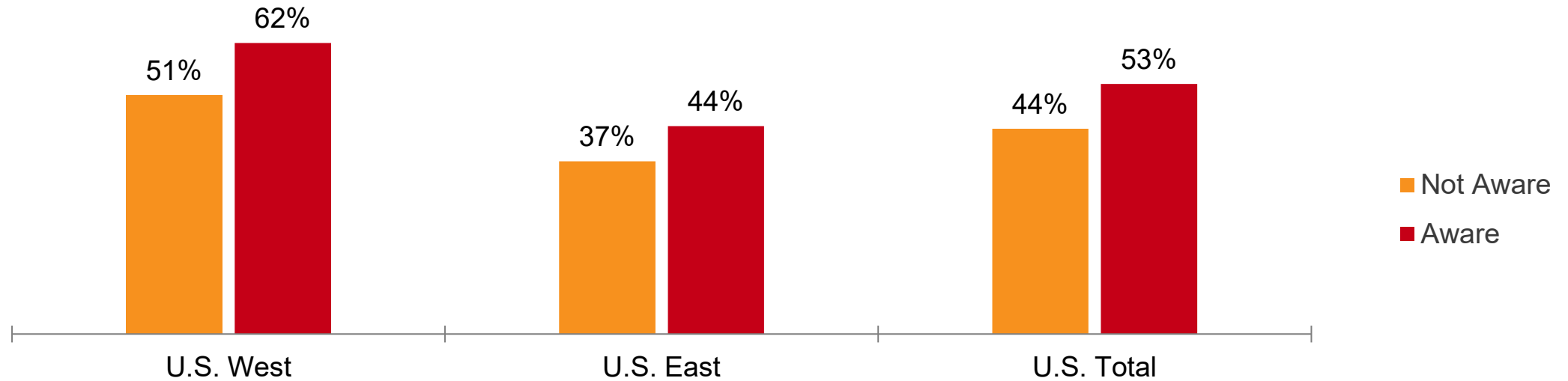
Education & Occupation



Source: TravelTrakAmerica, 2021 Q1 data (Prelim)  
www.omnitrakgroup.com

# HTA Marketing Effectiveness Study Excerpt, Considering Hawai'i Next Vacation

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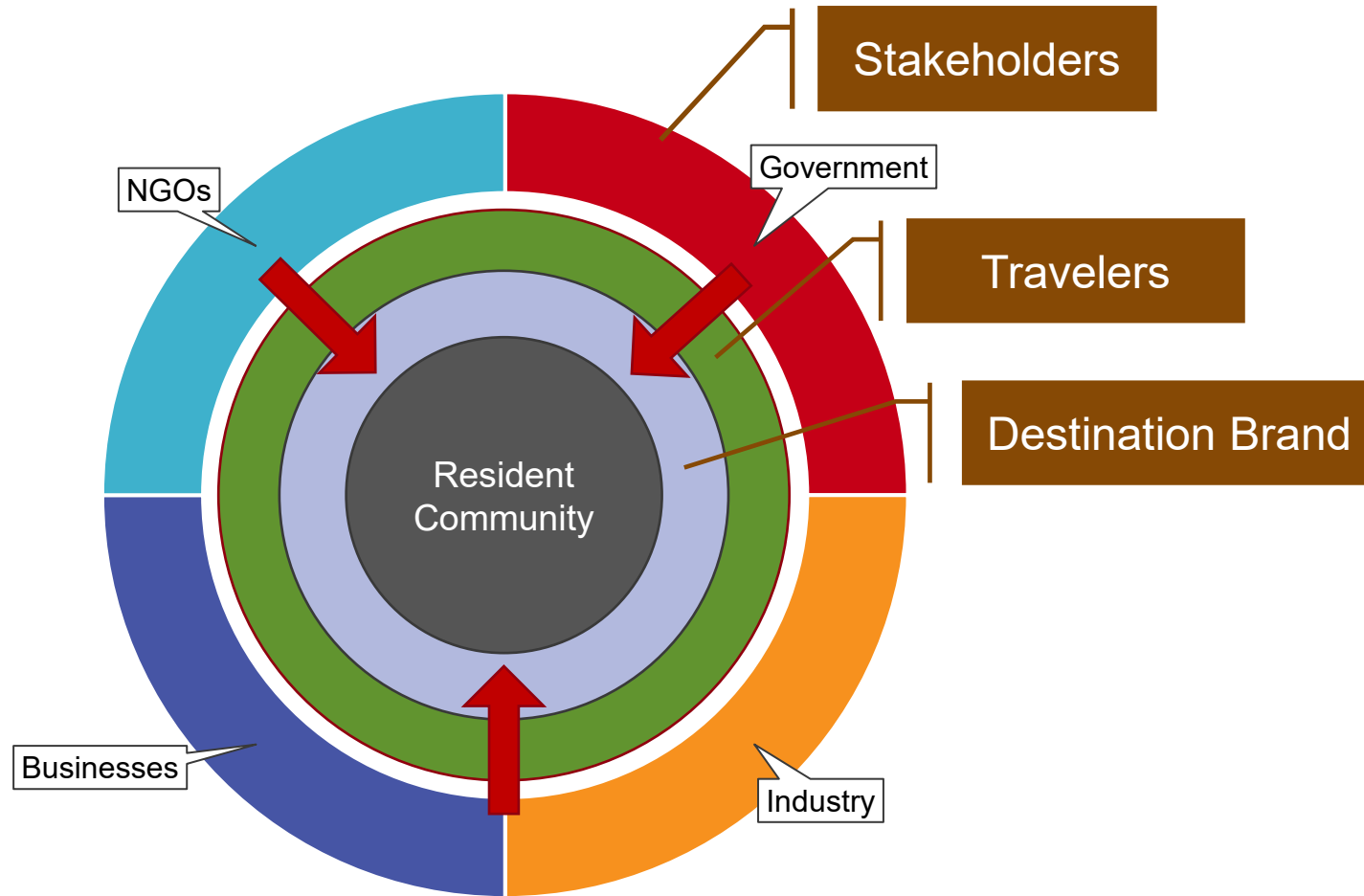
Source: Hawaii Tourism Authority  
MES Study, July – December 2019 Report  
[www.omnitrakgroup.com](http://www.omnitrakgroup.com)

# Destination Marketing Insights from Other Omnitrak MES Studies

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- Lower overall marketing awareness of domestic destinations in the past year.
- Drop in awareness was not as severe for destinations which maintained a presence in the marketplace.
- Domestic travel demand in general remained relatively strong due to uncertainties about traveling outside US and to major cities (NYC, Vegas, LA, etc.)
- Those destinations which continued to advertise had better perceptions about how they're handling COVID.
- It was harder to move the marketing needle among in-state residents, although they are/were more likely to travel.

# Destination Branding – Traditional Model

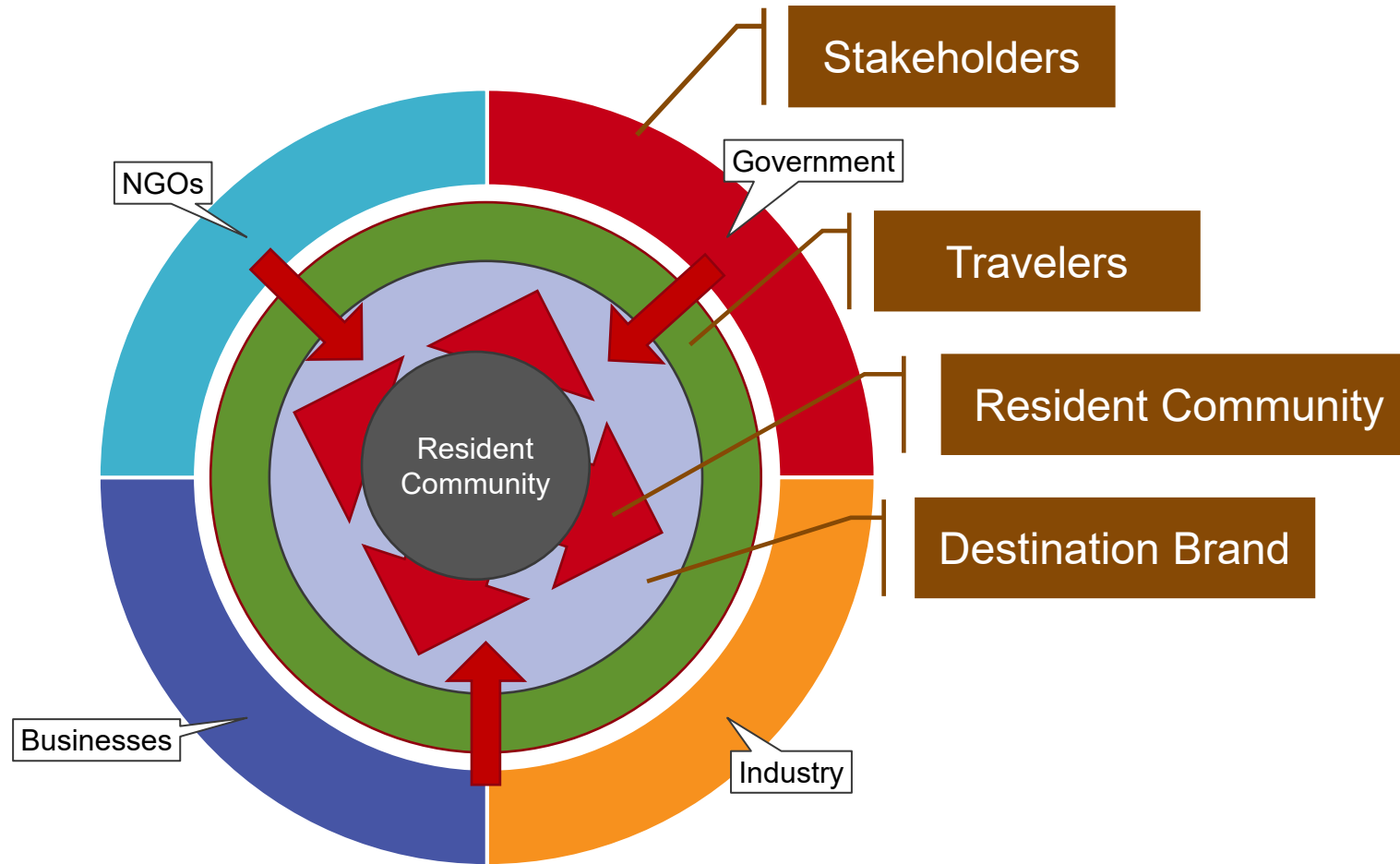


## Foundational Thinking

A great place to visit...is a great place to visit.

Source: Omnitrak Group Inc.  
[www.omnitrakgroup.com](http://www.omnitrakgroup.com)

# Destination Branding – a Potential Re-think?



## Foundational Thinking

A great place to live...is  
a great place to visit.

Source: Omnitrak Group Inc.  
[www.omnitrakgroup.com](http://www.omnitrakgroup.com)

# Mahalo!

## 2021: Unflattening the Curve

*Travel insights from Omnitrak's TravelTrakAmerica & Learnings from Other Destinations*

*Chris Kam, President, Omnitrak Group, Inc.*

*Hawai'i Tourism Authority Marketing Standing Committee*

*April 28, 2021*

## **Agenda Item #6:**

MCI updates and discussion presentation by  
John Reyes; Senior Vice President, HVCB

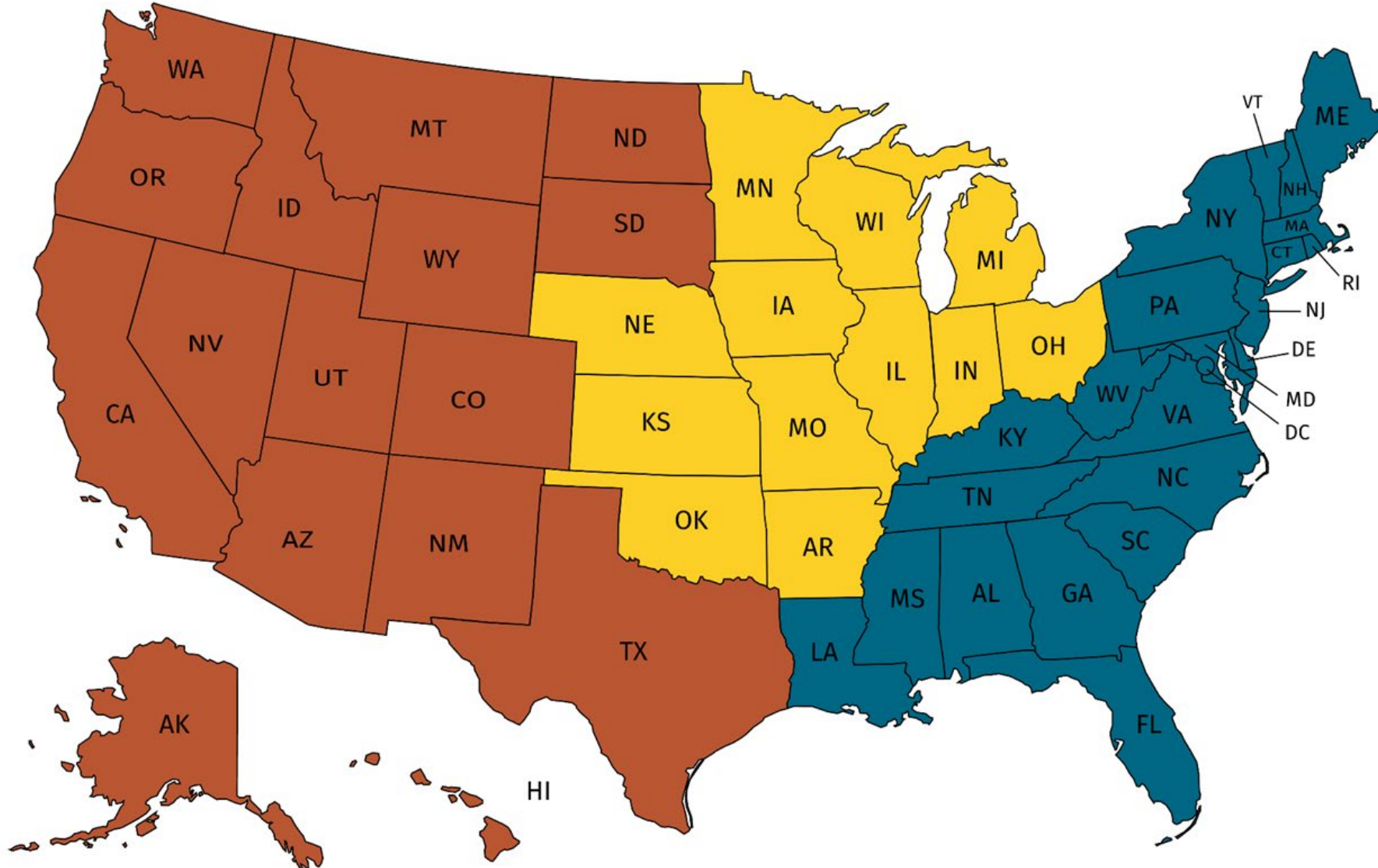


# Meet Hawai'i Update

April 28, 2021



# Meet Hawai'i Team – Division of HVCB



## Sales – Association

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## 'Elele Program

**Debbie Zimmerman**  
 dzimmerman@meethawaii.com

# MCI Trends

- In-person meetings are a priority again, confirmed Northstar Group's latest April 15, 2021 PULSE Survey.
  - Booking live or hybrid meetings is now primary function of 19% of planners, a 50% since Northstar's last survey.
- Focus on sourcing and sending RFPs are up.
  - Eight in 10 planners will hold their in-person event this year.
- As booking and sourcing activity rise, only 23% of planners are focusing on rebooking events – down from 32% just six weeks ago.
- Who's booking now? New in person events 29% associations, 25% third party and corporate planner bulk of action healthcare and pharmaceuticals.
- Hybrid events are holding steady.
  - Group volume will build this year – 80% of planners will hold their next in-person event this year.

# MCI Trends

- **Planners Support Meetings**
  - Fast growing percentage of meeting planners are ready to travel.
  - Forty-six percent will attend an in-person meeting or business event within the next three months
- **Confidence Grows, Fear Start to Recede**
  - Planner's level of concern has abated in fear of contagion, fear of travel and inadequate hotel and airline staffing.
- **List of worries; evolving protocols, hotel and venue staffing, government needs to produce limited liability policies for all industries.**

# YTD Production as of March 31, 2021

Room Nights	2021 Year-To-Date	Prior Year	Variance to Prior Year
<b>Citywide</b>			
Definite	0	0	N/A
New to Hawai'i	0	0	N/A
Tentative	33,975	9,672	251%
<b>Single Property</b>			
Definite	8,319	11,778	-29%
New to Hawai'i	4,878	10,591	-54%
Tentative	107,088	151,213	-29%

# FuturePace

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

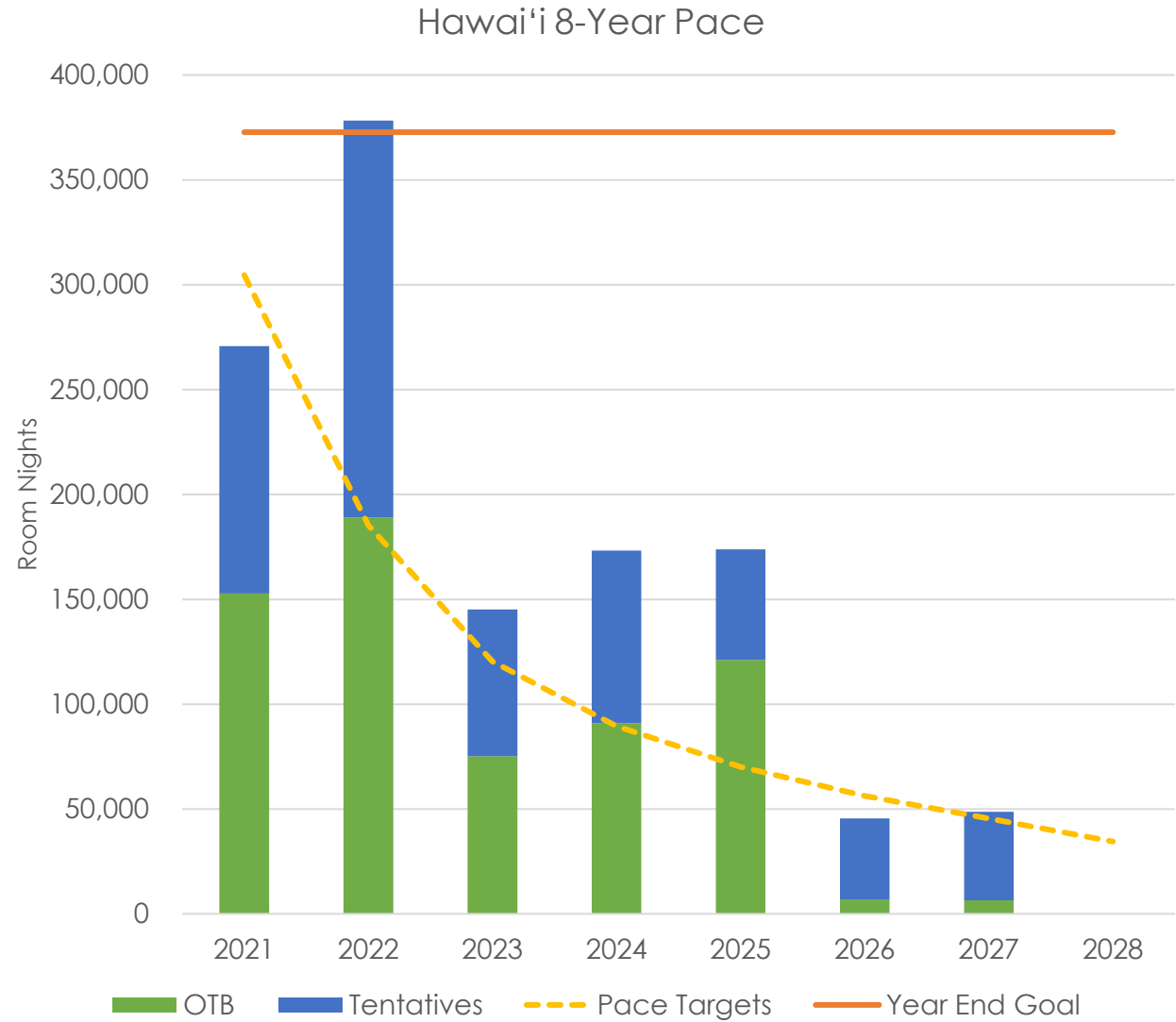
- **Long-Term Pace Report:** Due to citywide conventions, Meet Hawai'i is concerned about long booking windows which extends six to eight years in advance. Strategically, Meet Hawai'i wants to better understand in advance those time periods that are trending negative. The Long-Term Pace Report analyzes 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.

# FuturePace Report

Combined\* 8-year Pace  
 Period ending March 31, 2021

\*includes International GMTs

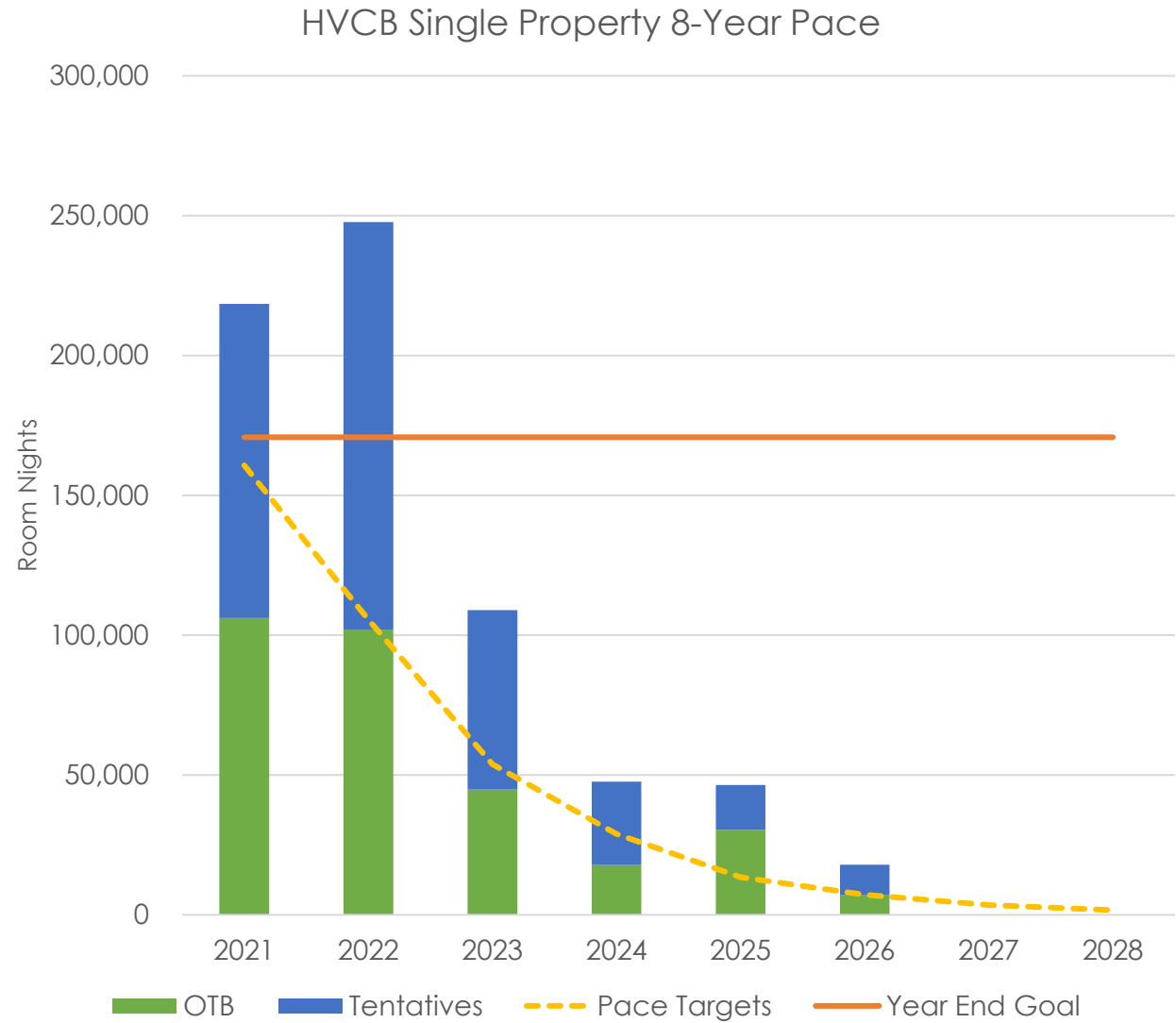
Year	OTB	Tentatives	# OTB	# Tentatives
2021	152,825	117,940	132	242
2022	189,004	189,372	86	190
2023	75,241	69,961	34	46
2024	90,957	82,295	19	21
2025	121,100	52,675	17	12
2026	6,999	38,481	4	8
2027	6,508	42,200	2	1
2028	0	0	0	0



# FuturePace Report

HVCB Single Property 8-year Pace  
 Period ending March 31, 2021

Year	OTB	Tentatives	# OTB	# Tentatives
2021	106,160	112,326	117	224
2022	102,044	145,754	69	181
2023	44,833	64,156	26	44
2024	17,804	29,876	12	17
2025	30,413	16,025	12	9
2026	6,999	10,905	4	5
2027	0	0	0	0
2028	0	0	0	0

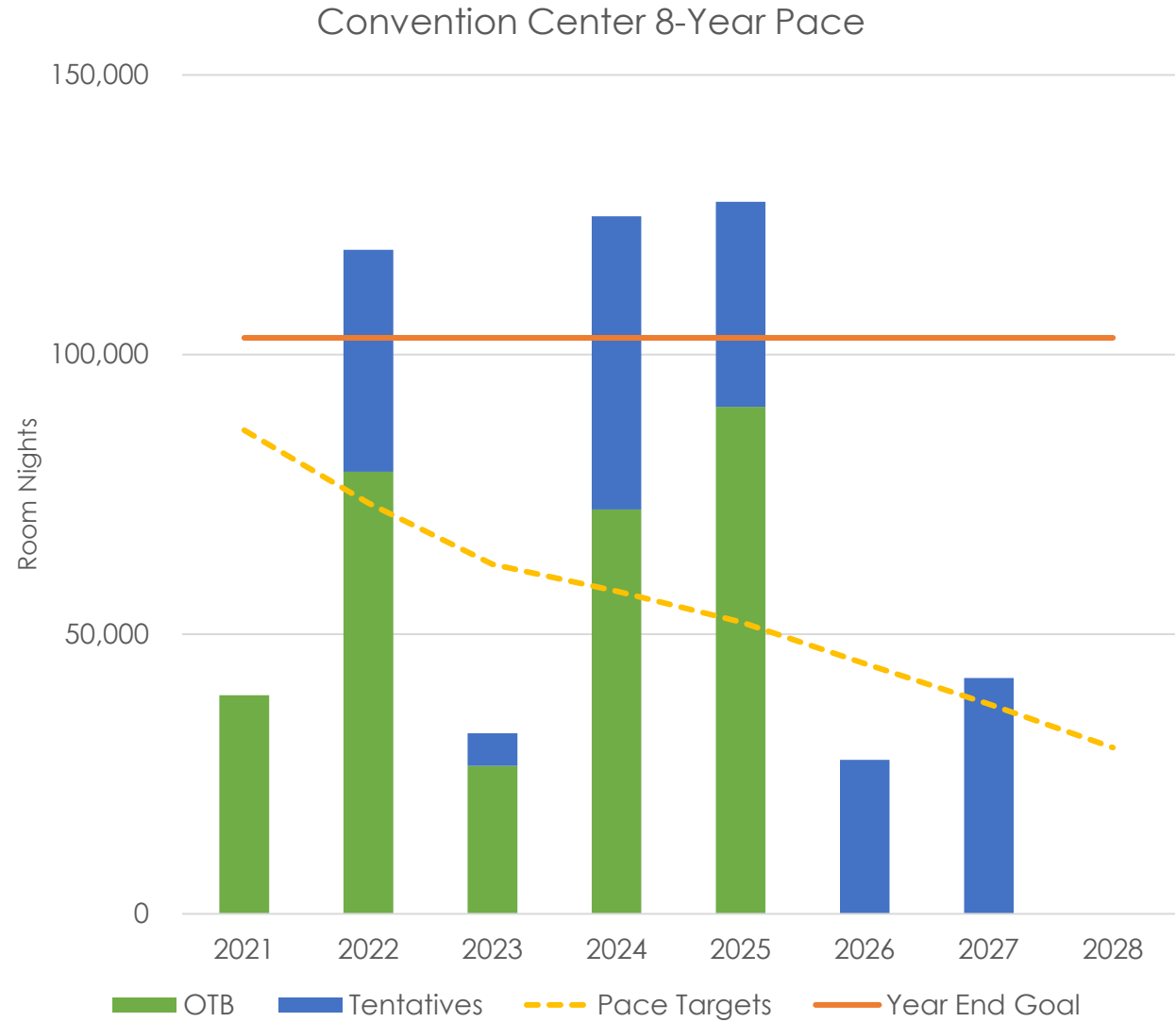


# FuturePace Report

## Convention Center 8-year Pace

Period ending March 31, 2021

Year	OTB	Tentatives	# OTB	# Tentatives
2021	39,113	0	5	0
2022	79,048	39,726	10	3
2023	26,481	5,805	5	2
2024	72,330	52,419	6	4
2025	90,687	36,650	5	3
2026	0	27,576	0	3
2027	0	42,200	0	1
2028	0	0	0	0





# 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	Rebook	1,200	1,910
9/8/2021	2021 CEC/ICMC Biennial Conference	Rebook	700	1,407
9/28/2021	Best Western 2021 Annual North American Convention	Definite	1800 - 2000	7,110
10/18/2021	SPOP Congress 2021	Rebook	1,700	5,320
11/7/2021	Healthy Buildings 2021	Definite	300	375
12/12/2021	2021 Pachem	Definite	4000	24,458

# Current Focus

## COVID-19 MCI Guidelines for Honolulu

- Managed by professional meeting planners
- Structured and Organized
- Self-Regulate & Meeting Room Occupancy based on CDC Social Distancing Guidelines
- Industry-Wide Support



**Mahalo!**

## **Agenda Item #7:**

Presentation by the HVCB that may include market insights, updates on air seats and certain assumptions including but not limited to programs for the balance of 2021



**HAWAII**  
VISITORS & CONVENTION BUREAU™

HAWAII TOURISM AUTHORITY

# Marketing Standing Committee Meeting

April 30, 2021



# Agenda

1. Market Insights
2. Mālama Hawai'i Update
3. 2021 Campaign Calendar

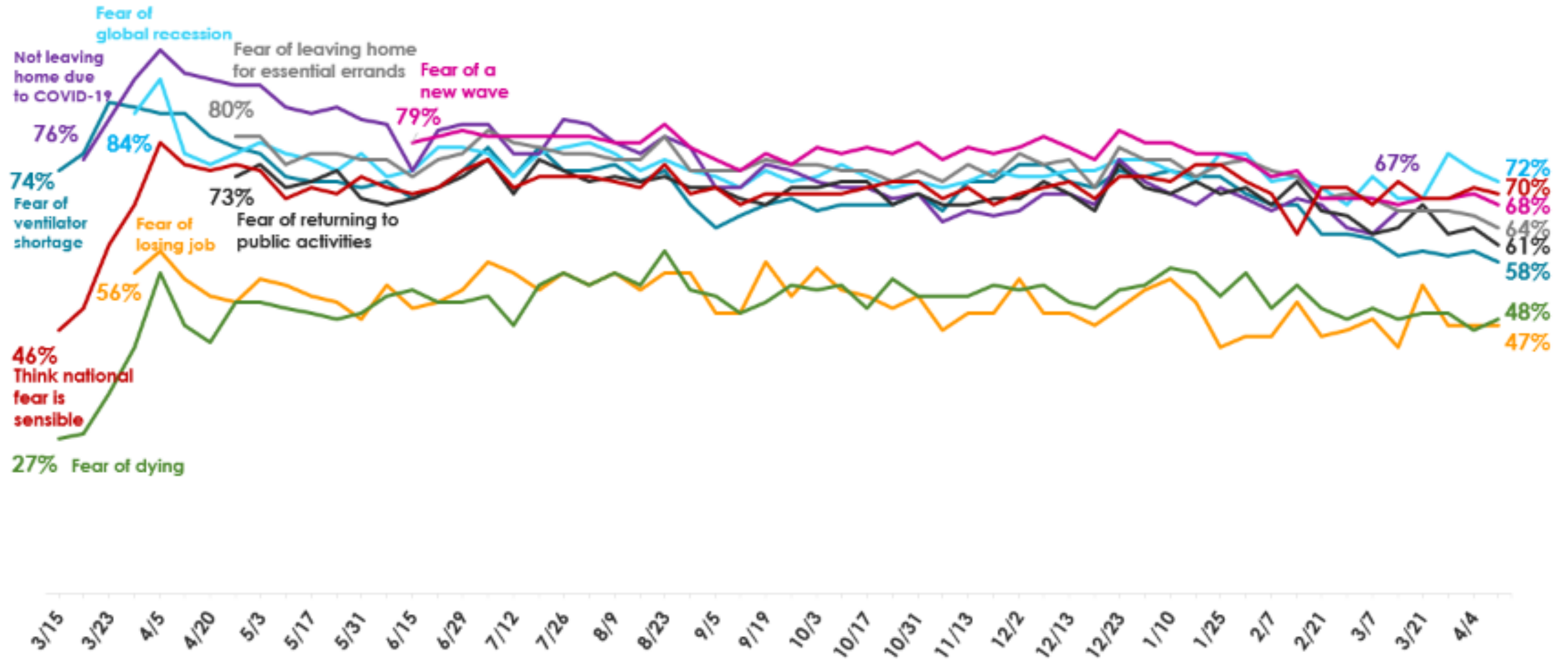


# Market Insights



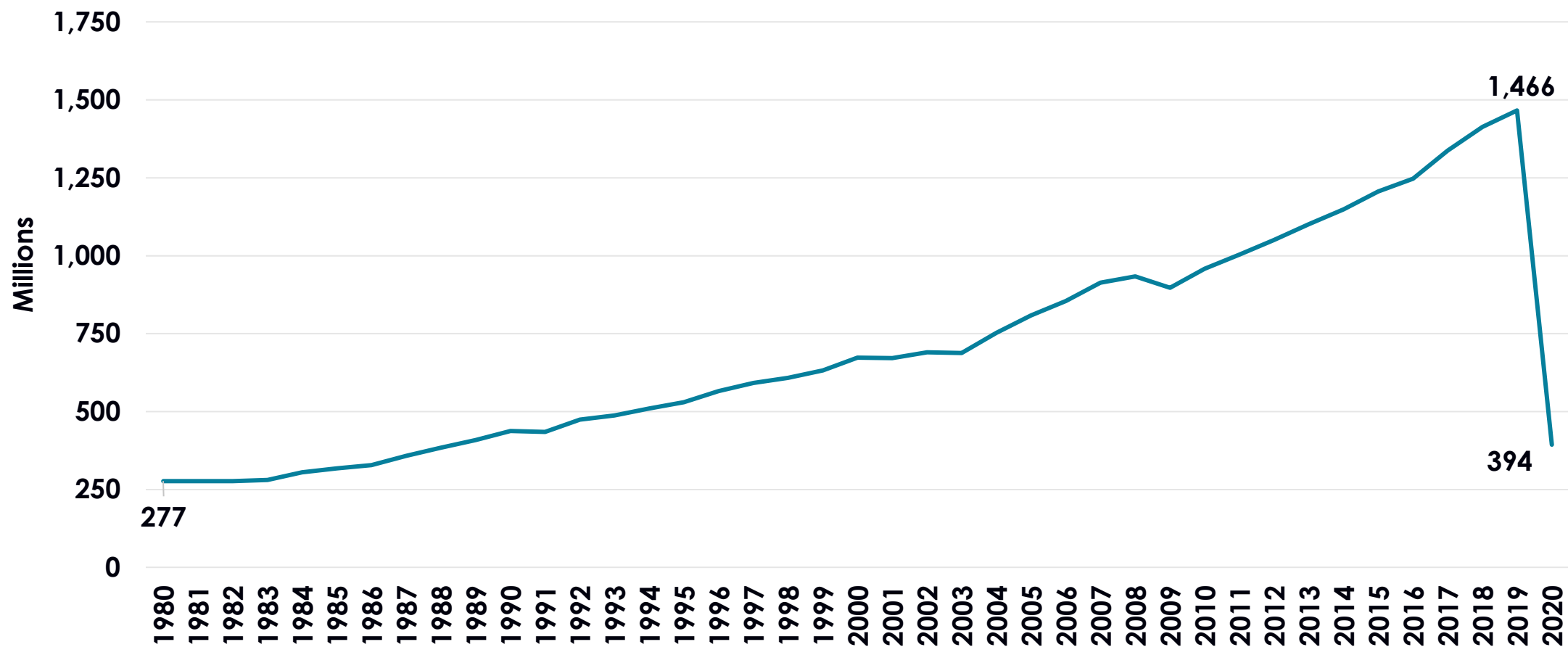
# The Harris Poll: COVID-19 in the U.S.

## The Task: Working in an Environment of Fear



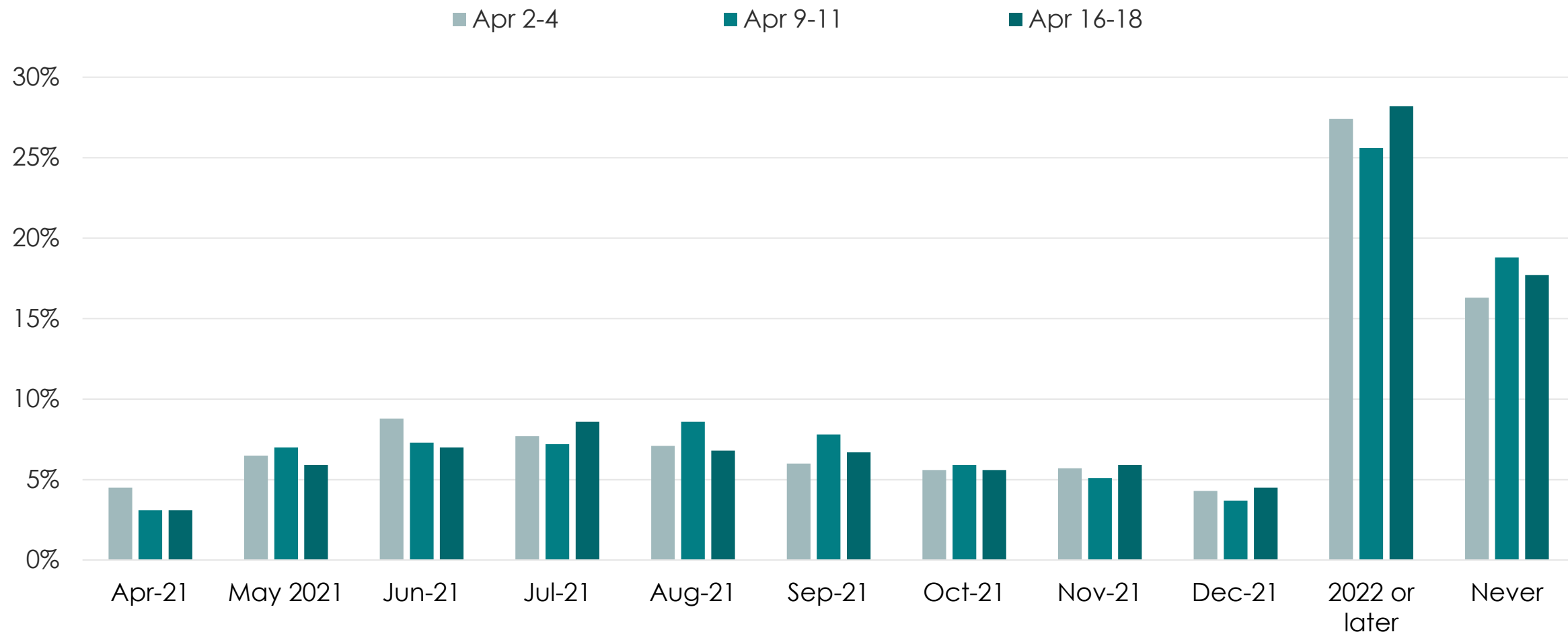


# UNWTO International Tourist Arrivals



Source: HVCB analysis of UNWTO Global Tourism Dashboard data

# Tentative Month of Next Commercial Air Trip of U.S. Leisure Air Travelers

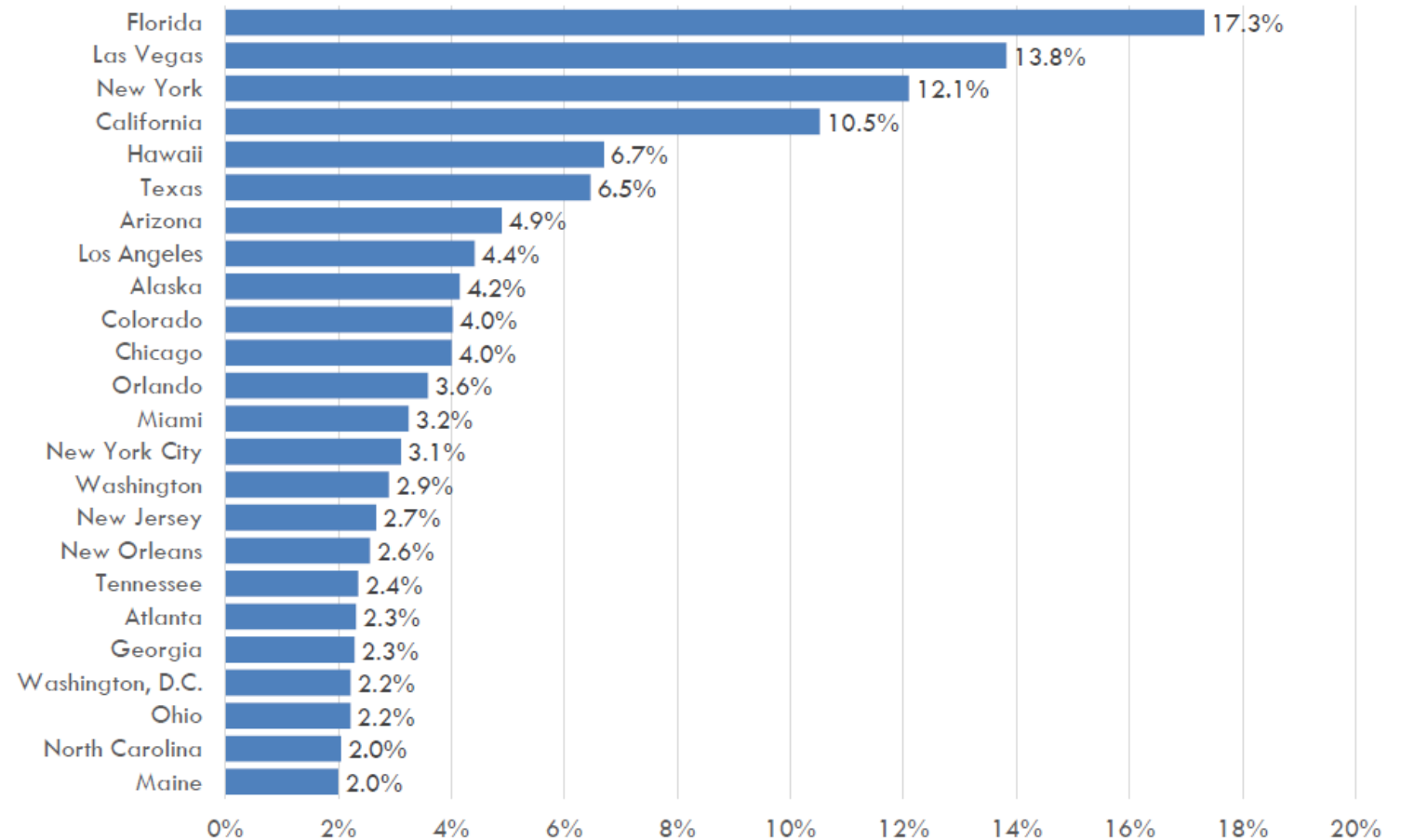


# Most Desired Domestic Destinations for 2021 (unaided)

**Question: Which domestic destinations do you most want to visit this upcoming year? (Write in up to three)**

**(Please only include destinations in the United States)**

*(Base: Waves 45 data. All respondents, 1,205 completed surveys. Data collected January 15-17, 2021)*

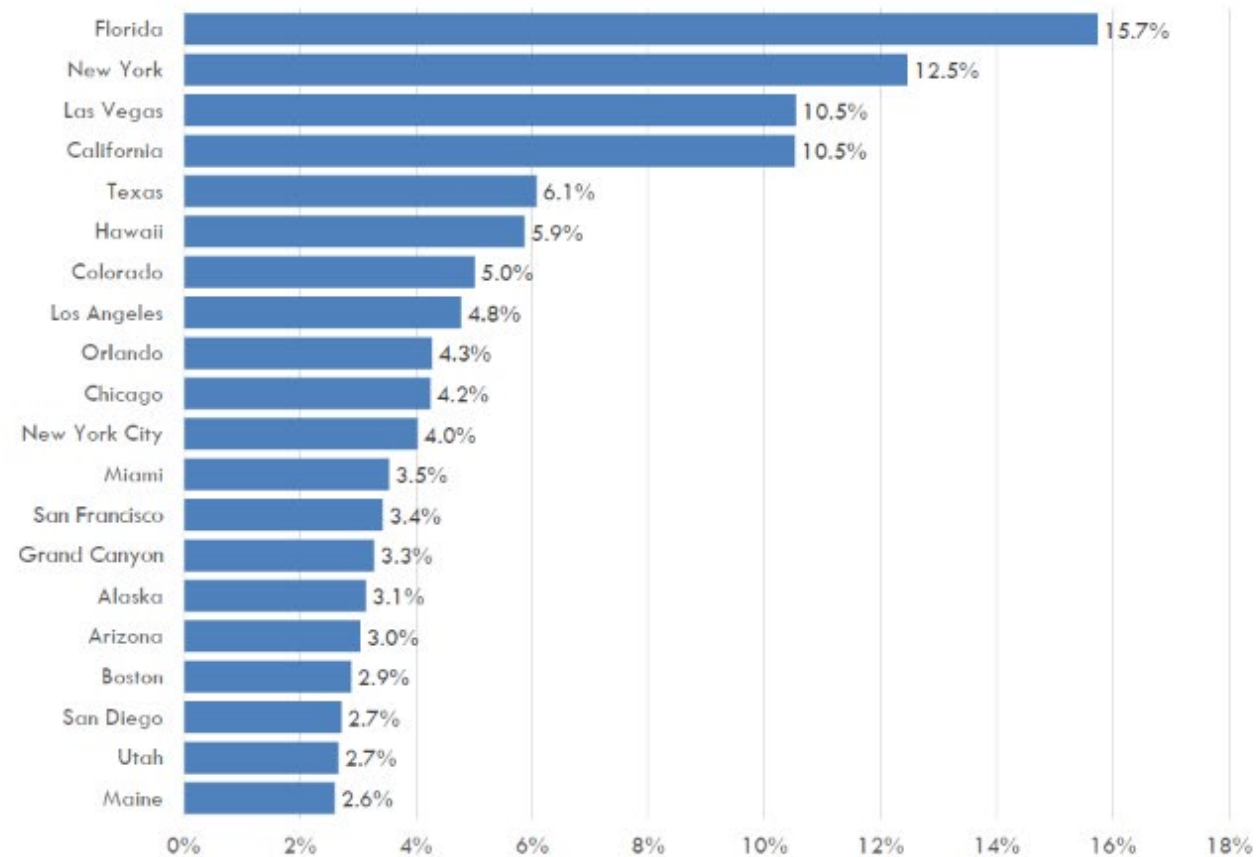


# Most Desired Domestic Destinations (unaided)

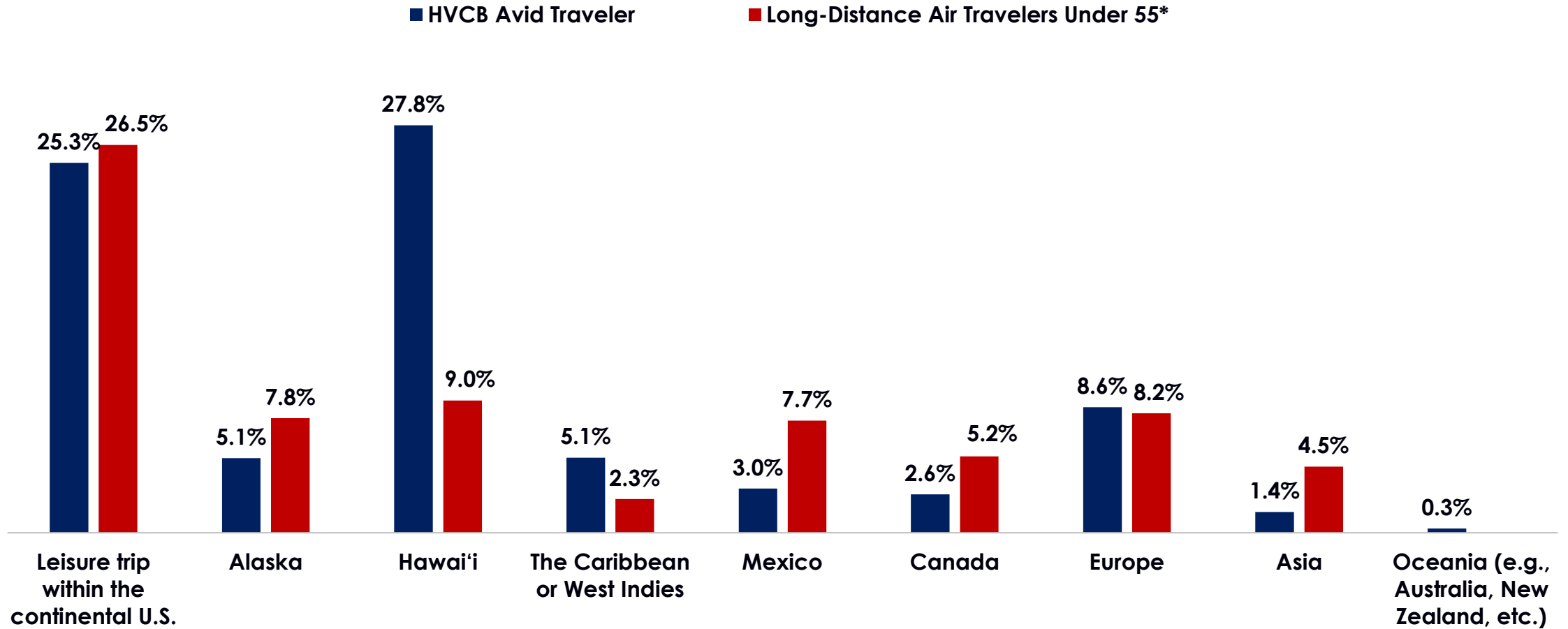
**Question: Which domestic destinations do you most want to visit this upcoming year? (Write in up to three)**

**(Please only include destinations in the United States)**

*(Base: Waves 58 data. All respondents, 1,210 completed surveys. Data collected April 16-18, 2021)*



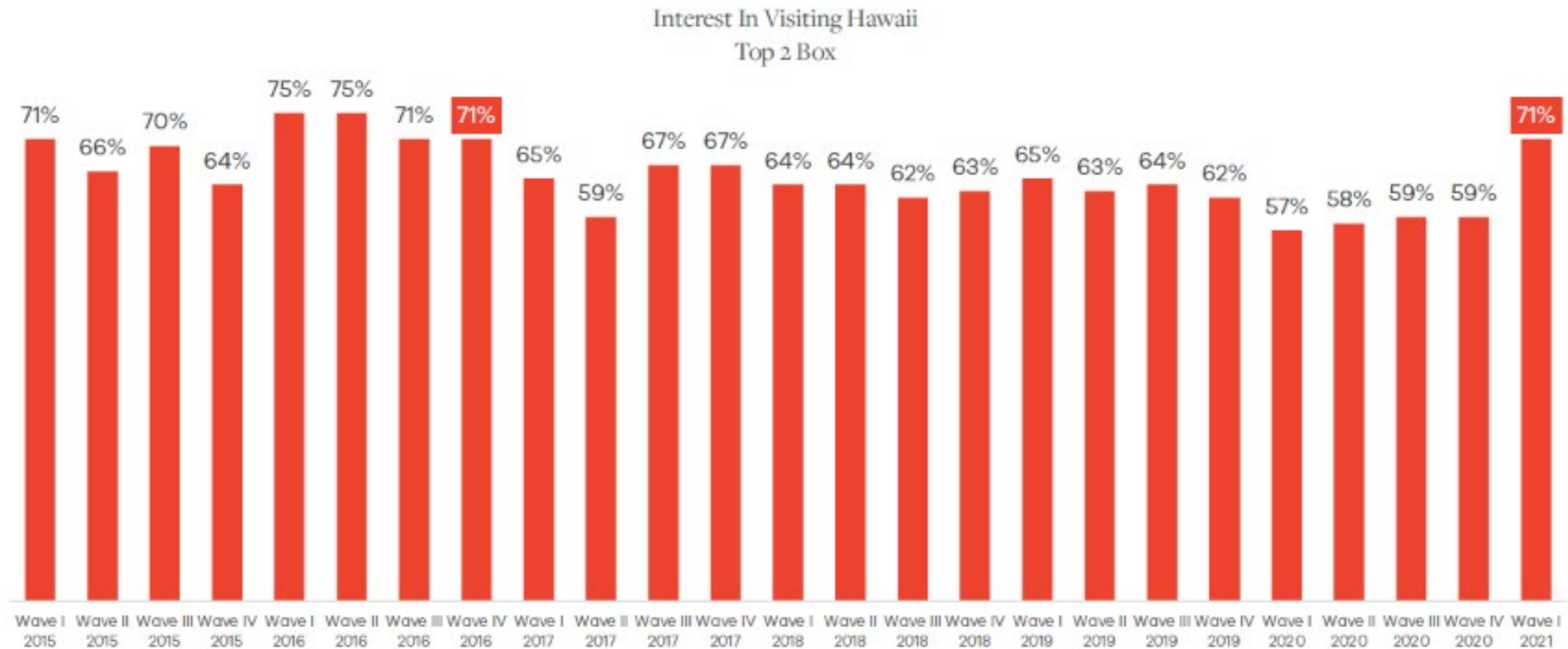
# Next Leisure Destination



\*sample size <100

Source: HVCB analysis of YouGov data as of April 11, 2021

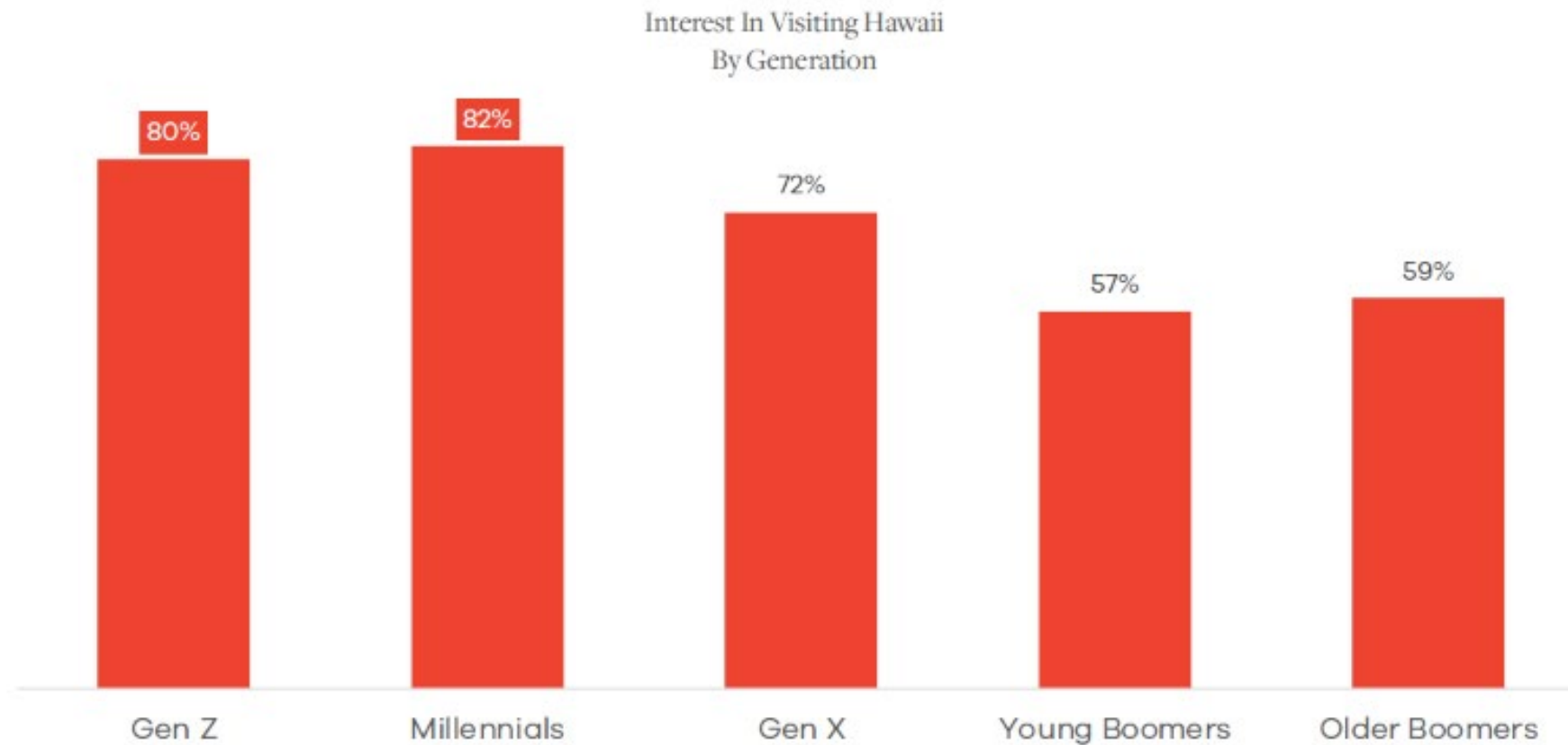
# Interest in visiting Hawai'i is back up and the highest it's been since 2016



Base: Air Travelers (n=1,516)  
Source: 2021 Portrait of American Travelers

Question/ On a scale of 1 to 5 where 1 is "Not at all interested" and 5 is "Very interested", how interested are you in visiting Hawaii on a vacation during the next 2 years?

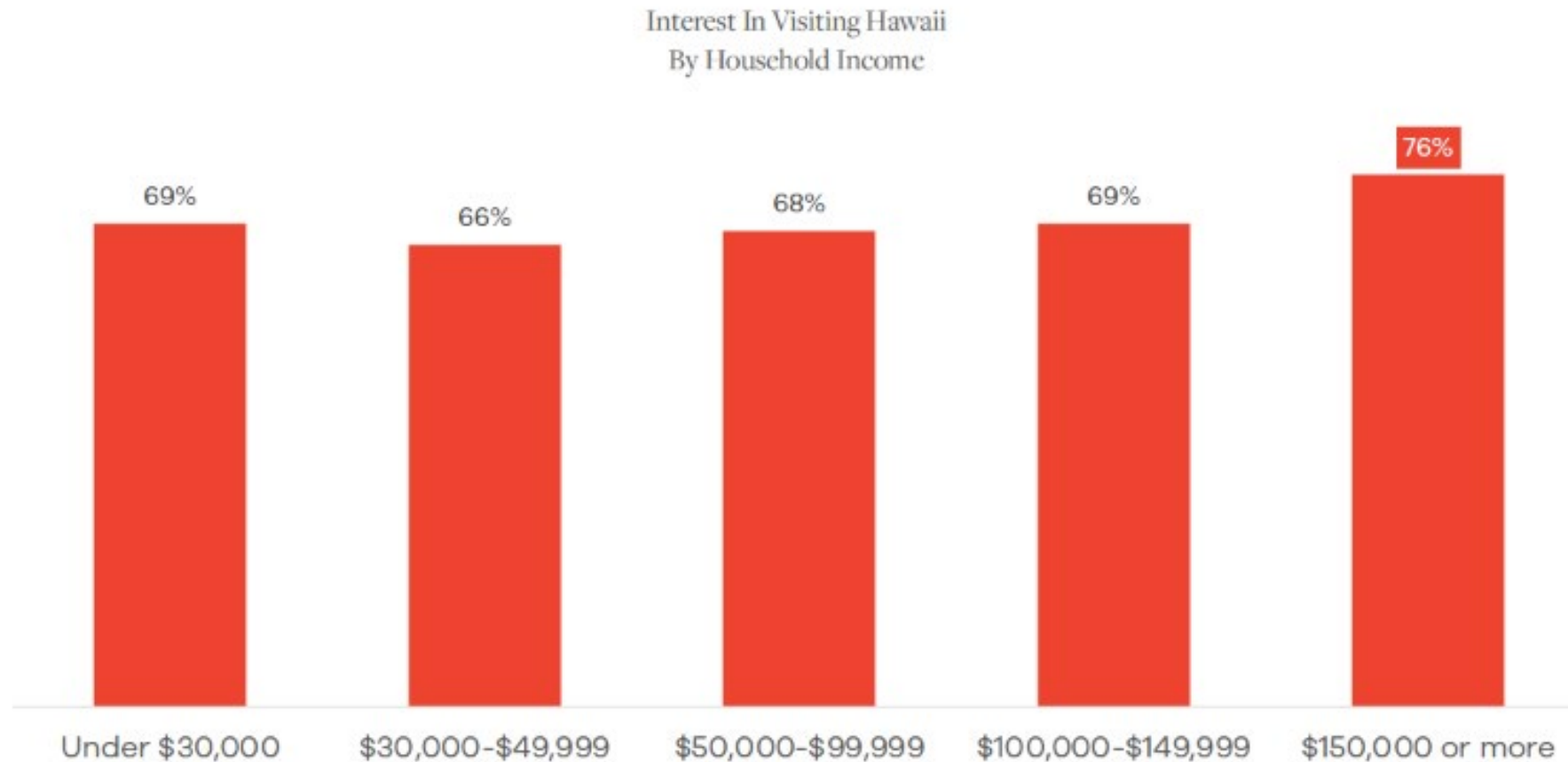
# Interest in visiting Hawai'i is highest among younger generations



Base: Air Travelers (n=1,516)  
Source: 2021 Portrait of American Travelers

Question/ On a scale of 1 to 5 where 1 is "Not at all interested" and 5 is "Very interested", how interested are you in visiting Hawaii on a vacation during the next 2 years?

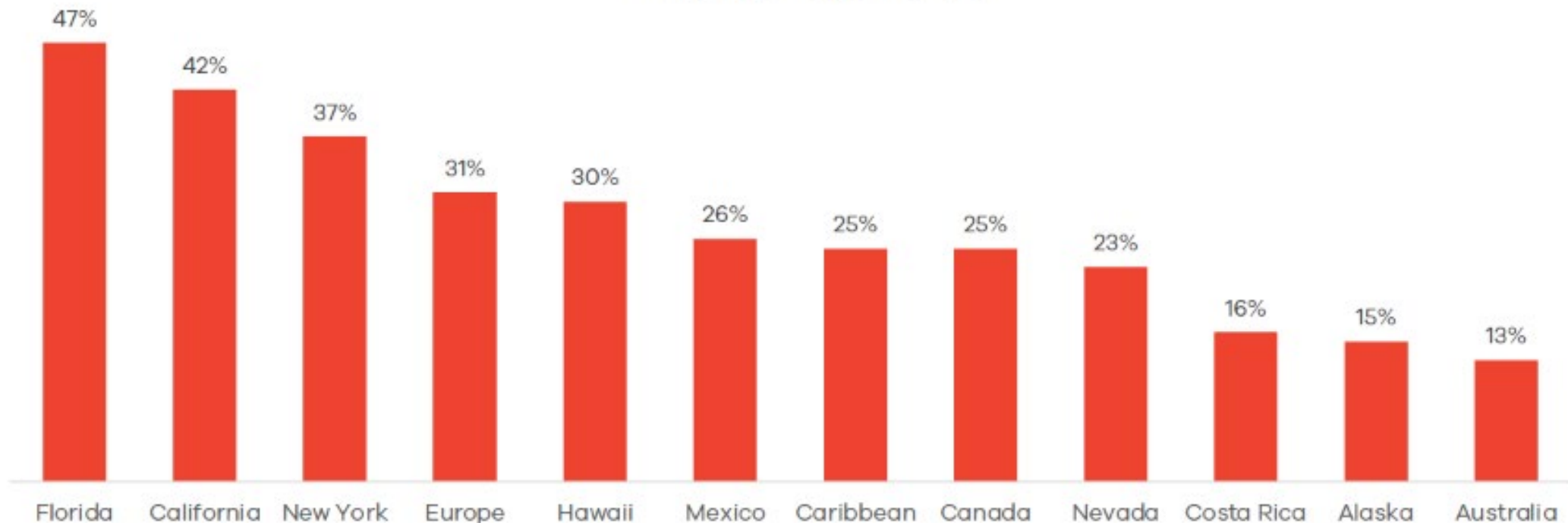
Interest in visiting Hawai'i is highest among those with higher household incomes.





The most popular previously visited destinations among those likely to visit Hawai'i are Florida, California and New York.

Destinations Visited in Past 3 Years  
Among Those Likely to Visit Hawaii



Base: Likely to Visit Hawaii (n=794)  
Source: 2021 Portrait of American Travelers

**Question/** Please indicate which of the following destination(s) you have visited for leisure in the past 3 years?

# Scheduled U.S. Seats to Hawai'i April – May 2019, 2020, 2021

Preliminary as of 4/16/21 –Subject to adjustment

	# of SEATS April 2019	# of SEATS April 2020	# of SEATS April 2021P	# of SEATS May 2019	# of SEATS May 2020	# of SEATS May 2021P
<b>O'ahu</b>	395,313	84,325	351,074	419,399	78,500	416,133
<b>Maui</b>	213,772	26,799	239,716	219,464	4,008	257,955
<b>Kona</b>	89,117	15,136	93,206	96,028	4,008	108,886
<b>Kaua'i</b>	75,484	12,543	38,108	79,966	3,236	58,916
<b>Hilo</b>	3,873	664	2,158	3,938	0	2,158
<b>Total</b>	773,686	139,467	724,262	814,857	89,752	844,048

# Scheduled U.S. Seats to Hawai'i June – August 2019, 2020, 2021

Preliminary as of 4/16/21 –Subject to adjustment

	# of SEATS June 2019	# of SEATS June 2020	# of SEATS June 2021P	# of SEATS July 2019	# of SEATS July 2020	# of SEATS July 2021P	# of SEATS August 2019	# of SEATS August 2020	# of SEATS August 2021P
<b>O'ahu</b>	441,174	81,216	462,149	462,801	119,333	490,181	453,028	140,757	485,271
<b>Maui</b>	257,829	12,885	287,428	273,254	18,461	299,767	248,915	16,876	292,321
<b>Kona</b>	104,573	3,281	122,906	110,095	7,528	128,359	98,448	9,657	127,786
<b>Kaua'i</b>	90,144	2,340	90,088	94,336	2,780	96,788	86,220	4,439	99,887
<b>Hilo</b>	4,700	0	5,178	5,146	0	5,549	4,804	0	5,549
<b>Total</b>	898,420	99,722	967,749	945,632	148,102	1,020,644	886,611	171,729	1,010,814

# Mālama Hawai'i Program Update



# 2021 Target Audience

- The Avid Explorer – mindful, responsible, respectful
- Continue to improve our knowledge on how to effectively invite Avid Explorer's to Mālama Hawai'i



# Mālama Hawai‘i Partners

- 90 partners... and counting
  - Listed on [gohawaii.com/malama](http://gohawaii.com/malama)
- Volunteer programs continues to grow:
  - Surfrider Foundation – Kaua‘i Chapter
  - Mālama Loko Ea Foundation
  - Hawai‘i Land Trust
  - Moloka‘i Land Trust
  - Leeward Haleakalā Watershed Restoration Partnership
  - Hawai‘i Forest Institute

TRAVEL REQUIREMENTS ISLANDS EXPERIENCES **HAWAIIAN ISLANDS** CULTURE PLANNING LANGUAGES Q

— MĀLAMA —  
HAWAII  
TAKE A TRIP THAT GIVES BACK

Take a Trip that Gives Back  
This is more than an invitation to come to Hawaii. This is an invitation to rec travel. By slowing down. And really getting to know a place. Travel deeper and to Hawaii and to you.

In an effort to inspire mindful travel, industry partners and volunteer groups come together with an initiative that encourages visitors to leave Hawaii better. Volunteer projects range from reforestation and tree planting to self-directed preservation, and creating Hawaiian quilts for our Kupuna (elders). By making a more enriching travel experience and can even enjoy a free extra night!

Mālama (care for) Hawai‘i with us. By following best public health practices. By with our culture. By helping us perpetuate the beauty of Hawai‘i. And leaving with a trip that truly stays with you. It

**Statewide**

- [Alaska Airlines](#)

**Kauai**

- [Hilton Garden Inn Kauai at Wailua Bay](#)
- [The ISO](#)
- [Kaha Lani](#)
- [Kauai Grand Hyatt Kauai Resort & Spa](#)
- [Kauai Kailani](#)
- [Kauai Koloa Landing Resort at Poipu, Autograph Collection](#)
- [Kauai's Marriott Resort](#)
- [Kiahuna Plantation & the Beach Bungalows](#)
- [Koa Kea Hotel & Resort](#)
- [Makaheuna](#)
- [Poipu Shores](#)
- [Sheraton Kauai Resort](#)

**Oahu**

- [Alohilani Resort Beach Waikiki](#)
- [Bamboo Waikiki Hotel](#)
- [Courtyard Marriott Oahu North Shore](#)
- [Embassy Suites by Hilton Oahu Kapolei](#)
- [Embassy Suites Waikiki Beach Walk](#)
- [Hyatt Centric Waikiki Beach](#)
- [Hyatt Regency Waikiki Resort Spa](#)
- [The Imperial Hawaii Resort](#)
- [The Kahala Hotel & Resort](#)
- [The Laylow, Autograph Collection](#)
- [Moana Surfrider, A Westin Resort & Spa](#)
- [Outrigger Waikiki Beach Resort](#)
- [Prince Waikiki](#)
- [Residence Inn by Marriott Oahu Kapolei](#)
- [The Ritz-Carlton Residences, Waikiki Beach](#)
- [The Royal Hawaiian](#)
- [Sheraton Princess Kaiulani](#)
- [Sheraton Waikiki](#)
- [Waikiki Beach Marriott Resort & Spa](#)
- [Waikiki Beachcomber by Outrigger](#)
- [Waikiki Grand](#)
- [Waikiki Malia by Outrigger](#)
- [Waikiki Shore](#)

**Maui**

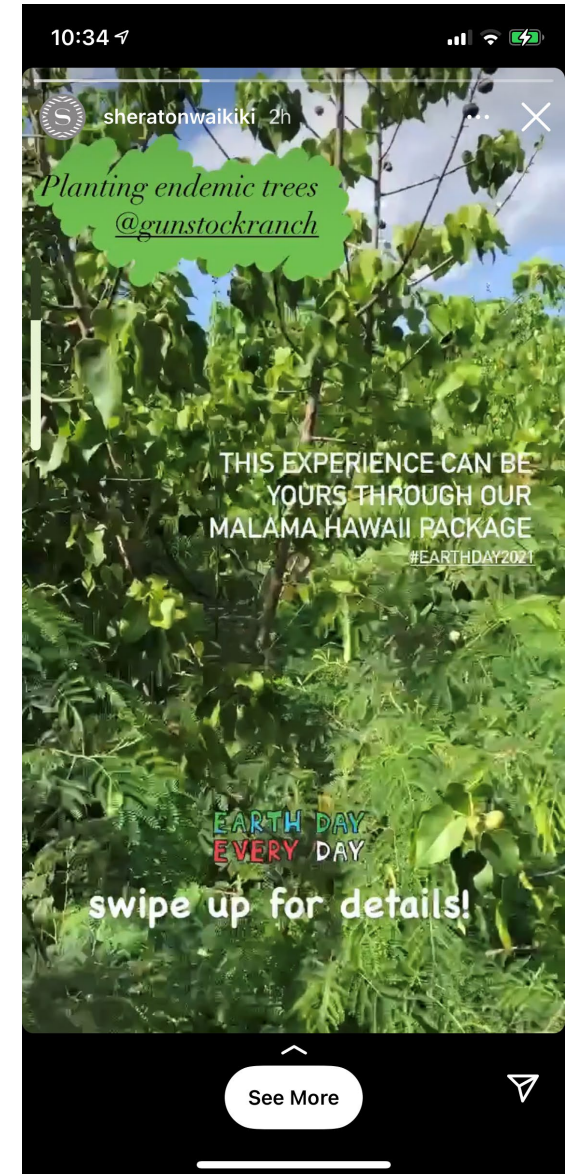
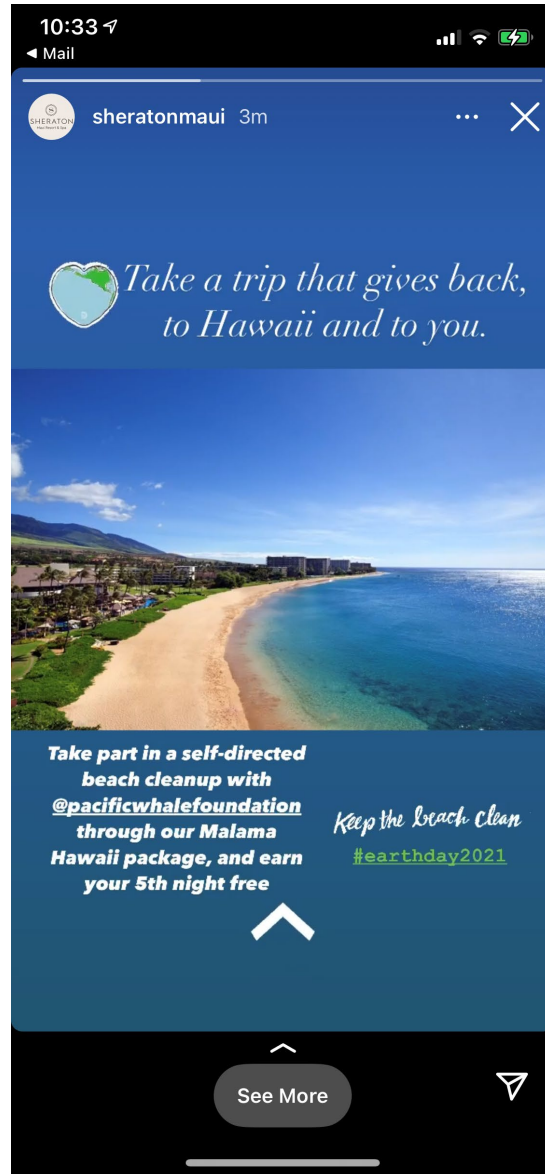
- [Andaz Maui at Wailea Resort](#)
- [Chase 'N Rainbows](#)
- [Courtyard Maui Kahului Airport](#)
- [Fairmont Kea Lani](#)
- [Four Seasons Resort Maui at Wailea](#)
- [Hana Maui Resort](#)
- [Hyatt Regency Maui Resort & Spa](#)
- [Kaanapali Alii](#)
- [Kamaole Sands](#)
- [Lahaina Shores Beach Resort](#)
- [Makana Surf](#)
- [Paki Maui](#)
- [Polo Beach Club](#)
- [Puunoa Beach Estates](#)
- [Residence Inn Maui Wailea](#)
- [The Ritz-Carlton, Kapalua](#)
- [Sheraton Maui Resort & Spa](#)
- [Wailea Beach Villas](#)
- [Wailea Ekahi Village](#)
- [Wailea Elua Village](#)
- [Wailea Ekolu Village](#)
- [Wailea Grand Champions](#)
- [Wailea Beach Resort](#)
- [The Westin Maui Resort & Spa, Kaanapali](#)

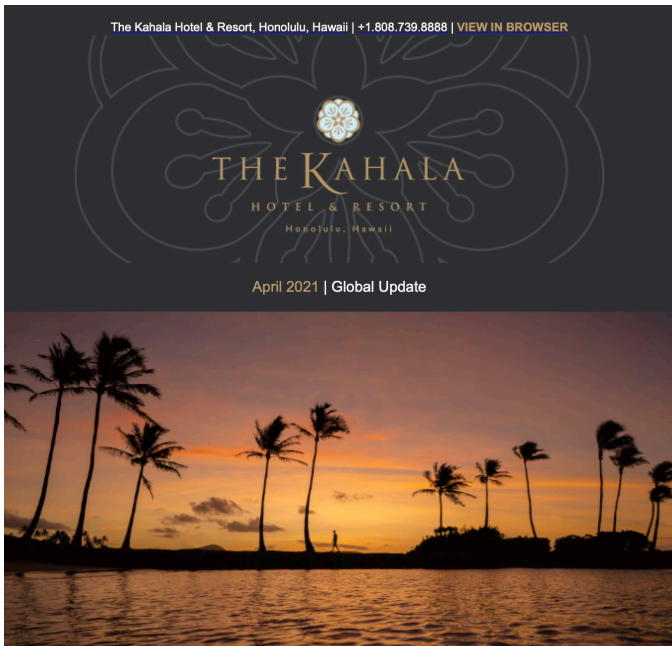
**Island of Hawaii**

- [Courtyard King Kamehameha's Kona Beach Hotel](#)
- [Fairmont Orchid, Hawaii](#)
- [Haliu Kai](#)
- [Hilo Hawaiian Hotel](#)
- [Kanaloa at Kona](#)
- [Kona Reef](#)
- [Mauna Kea Beach Hotel, Autograph Collection](#)
- [Sheraton Kona Resort & Spa at Keauhou Bay](#)
- [Waikoloa Beach Marriott Resort & Spa](#)
- [Waimea Country Lodge](#)
- [The Westin Hapuna Beach Resort](#)

**Volunteer Opportunities**

- [Battleship Missouri Memorial](#)
- [Hawaii Land Trust](#)
- [Hawaiian Legacy Reforestation Initiative](#)
- [Lahaina Restoration Foundation](#)
- [Pacific Whale Foundation](#)
- [Sustainable Coastlines Hawaii](#)
- [Travel2Change](#)
- [Uluhau o Hualalai](#)
- [Waikoloa Dry Forest Initiative](#)





April 2021 | Global Update

## Take a Trip That Gives Back

When you visit The Kahala, we want you to truly experience our island home and travel deeper. Connect with our community through our [Malama Hawaii](#) offer, which provides 20% off your stay in exchange for participating in one of the sustainability initiatives offered by Travel2Change and KISCA. This package is dedicated to mindful travel—encouraging you as a visitor to leave Hawaii better than when you arrived.

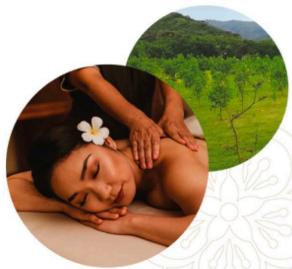
[LEARN MORE](#)

### Plant Your Legacy

#### TREATMENT

Enjoy a unique opportunity to restore Hawaii's diverse ecosystem by planting a tree in your name, or in honor of someone you love. As a thank you, receive \$50 off a Kahala Spa treatment.

[LEARN MORE](#)



EMBASSY  
SUITES

by HILTON™

Waikiki Beach Walk®

## SUSTAINABLE SUITE LIFE: HOW TO PLAN A WAIKIKI VACATION THAT GIVES BACK

Each April, Earth Day is an annual reminder to think about our impact on Mother Nature. But really, it's something we should be conscious of all year round, especially while traveling. When visiting such a culturally and environmentally rich destination as O'ahu, how can you ensure you are showing respect and leaving the place better than when you came? And what authentic experiences can you collect that will leave you transformed? Check out our tips on vacationing in a way that gives back to the destination and yourself, all while having a ton of fun in paradise.

Tip 1: Plant a native tree

In Hawaiian, the word malama, means 'to care for.' When you book the [Malama Hawai'i package](#) at Embassy Suites Waikiki, you'll receive your 4th night free, an upgrade to the next available category, 2 p.m. late check out, and the opportunity to plant a native tree.

You are invited to scenic [Gunstock Ranch](#) on O'ahu's North Shore to plant your own milo tree which furthers [Hawaiian Legacy Reforestation's](#) initiative to re-establish critical habitats for endemic Hawaiian species, many which are endangered. In fact, Embassy Suites Waikiki has its own forest at the ranch where staff and previous guests have left their legacies. Plus, for every resort charge contribution, the hotel gives a portion back to the Hawaiian Legacy Reforestation Initiative.



# Firsthand Media Experiences

- **Jay Jones**, *Los Angeles Times*
- **Mei Kwok**, Social influencer via Southwest Airlines
- **Kevin Allen**, *HAWAII Magazine*
- **Kari Wright**, *Boston Globe*
- **Jeff Jenkins**, Social influencer with *T+L*
- **Zahrah Farmer**, "Days with Zahrah" on KGO-TV (Bay Area) and Amazon Prime



# The Travel Mom

- TV segments in 11 markets
  - Including LA, Phoenix, Portland, Las Vegas
  - Aired March 20 – April 16
  - Included Mālama Hawai‘i program
- Dedicated Mālama Hawai‘i video

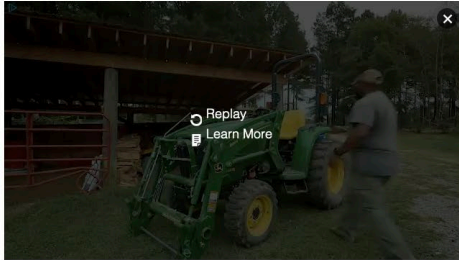


TRAVEL

## A Stay at These Socially and Environmentally Responsible Hotels Can Help Save the World

### 5 Socially and Environmentally Responsible Hotels Committed to Giving Back

#### 1. Vermejo, A Ted Turner Reserve



Where it is: Raton, New Mexico

**Why you should go:** A visit to **Vermejo, A Ted Turner Reserve** is a breath of fresh air. Set against the snow-capped alpine tundra of northern New Mexico, the reserve encompasses over 558,000 sprawling acres of restored lands. Founded by media mogul and philanthropist Ted Turner, Vermejo's rugged landscape serves as a sanctuary for numerous endangered wildlife species, including the Rio Grande cutthroat trout, Bolson tortoise, and Mexican wolf. The hospitality brand includes **Ladder** (in Caballo, New Mexico) and **Armendaris** (in southern central New Mexico). The properties all work hand-in-hand with scientist-led conservation efforts, including the Species Fund to protect and rehabilitate the native ecosystems that support the surrounding diversity. For example, Vermejo is a crucial part of the Castle Rock bison herd, which are critical for driving efforts to re-establish the region's wild bison herds and protecting genetic diversity. Stream restoration programs have also resulted in an abundance of rare wildlife species, which are on full display for visitors to appreciate.

[LEARN MORE](#)



Courtesy of SCP Hotels  
SCP Hotel Colorado Springs

#### 2. SCP Hotel Colorado Springs

Where it is: Colorado Springs, Colorado

**Why you should go:** SCP—which stands for Soul Community Planet—bills itself as a “Holistic Hospitality” company that prioritizes kindness (community), and sustainability (planet). **SCP Hotel Colorado Springs** offers a fresh and thoughtfully designed stay throughout, such as implementing solar power, eliminating single-use plastic toiletries, and serving ethically sourced coffee. The hotel's life is its newly launched **Every Stay Does Good program**. They've partnered with a collection of causes that tie into their mission and translates to measurable impacts. So every time a guest checks in, the following happens: One youth receives water through **WE Well-being**; one family caring for a critically ill child has their home lit for 24-hours through **Miracles**; one deforested area through **One Tree Planted**. Every time a guest chooses to stay at an SCP Hotel, not only do they experience a bohemian vibe, they also are consciously choosing to join a community that's driving positive change in the world through the Community Planet. The brand's portfolio also includes **SCP Hotel Depoe Bay** and **SCP Hotel Redmond** (both in Oregon).

[LEARN MORE](#)



Courtesy of The Tides Inn  
The Tides Inn

#### 3. The Tides Inn Resort and Marina

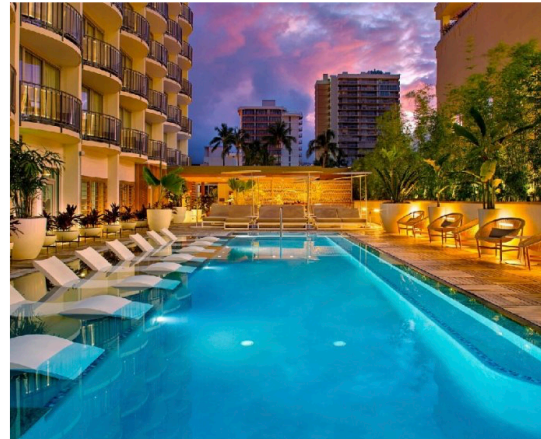
Where it is: Irvington, Virginia

**Why you should go:** There are countless reasons why **The Tides Inn Resort and Marina** is one of the Chesapeake Bay's most beautiful properties. Located on the peninsula in the heart of Virginia's Northern Neck region, the property attracts all types of travelers, from lovebirds to families and guys in need of a golf getaway. The inn sits on a tributary of the Chesapeake Bay estuary and employs sustainable practices. In March 2021, they announced the **Tides Inn Waterfront Restoration Project**. The \$3.6 million multi-year project includes a living shoreline, 150 linear feet of oyster reef habitat, 1,300 linear feet of new wharf, and the addition of more than 100 trees. The property has also appointed a resident ecologist who will help carry out interactive “in the field” educational programming to elevate guests into environmental stewards in their own communities.



See how much you can earn  
Get started as a host. Learn how  
Vrbo keeps you, your home, and  
your things safe. Ad

[LEARN MORE](#)



Courtesy of The Laylow, Autograph Collection  
The Laylow, Autograph Collection

#### 4. The Laylow, Autograph Collection

Where it is: Honolulu, Hawai'i

**Why you should go:** **The Laylow**, an Autograph Collection property, is one of O'ahu's coolest hotels. Situated in Waikiki, the hip hideaway was inspired by the iconic designs of architect Vladimir Ossipoff and boasts a retro mid-century-modern-meets-tropical vibe. In an effort to continue inspiring mindful travel, the hotel has partnered with **The Hawaiian Legacy Reforestation Initiative**. Guests can support reforestation efforts on O'ahu through various ways, like rolling up their sleeves and joining a North Shore excursion to Gunstock Ranch and planting new trees. The partnership is part of the larger **Mālama Hawai'i program**, a new collaboration between the **Hawai'i Tourism Authority**, select volunteer organizations, and an alliance of tourism partners. The goal of Mālama (which translates to “care for”) is to protect and preserve Hawai'i for the future while also giving travelers more meaningful and enriching travel experiences that will help them form deeper connections with the destination. There are currently more than 70 hotel partners participating in the state-wide program, each offering their own experiences and perks—some are even giving guests an extra free night in exchange for their good deeds. That's what we call a win-win.

[LEARN MORE](#)

# 5 Ways to Be a More Earth-Conscious Traveler

You can make a big impact with a few small changes.

By Lella Najafi Updated on 4/21/2021 at 6:43 PM



THOMAS BARWICK/DIGITALVISION/GETTY IMAGES

Over the past year and change, while we languish in fever with virtual tours of the Louvre and animal care needed R&R. According to a new study, fewer cars actually caused a 7% (or 2.6 billion metric ton) dec showing the most significant decrease.

Though viral posts about swans and dolphins frolic canals were mostly debunked, it's a sentiment worth consumers want to be more conscious about support the bulk of today's travelers are more mindful about their money, and the impact they have on the earth

There are simple ways to protect the planet while an environment-friendly vacations to making your hot more eco-conscious traveler.



## Donate to a carbon fly

Every time you get on a plane, carbon dioxide is emitted. give up flying completely—but for short domestic trips, Amtrak not only provides a scenic experience and also reduced emissions by 20% since 2010, with the

For long flights you can't avoid, consider donating to a way to counteract (or cancel out) the carbon emissions money toward a project that funds renewable energy

For example, Delta's carbon emissions calculator shows that a round trip flight from New York to Los Angeles generate 0.709 metric tons of carbon. To offset the emissions, you can donate around \$7 to initiatives like the Tist Program in Kenya, or the Guatemalan Conservation Cost Project. Booking sites often present the option to carbon offset at checkout, making this an easy and quick way to give back.



## Book LEED-certified hotels

LEED stands for Leadership in Energy and Environmental Design. It's a universal set of guidelines that rates buildings by how sustainable they are. Buildings with LEED certification are designed to reduce energy consumption, water usage, and air pollution. Based on the number of LEED certifications, hotels are awarded Platinum, Gold, Silver, or Certified Green.

Along with prioritizing sustainable hotels, many hotels have also created executive programs—like Montage Laguna Beach, Soho House, and Four Seasons. Brands like Marriott International and Hilton also have sustainable portfolios.

You probably already have a mode of transport that not only finds you the best deal but also means a flight that's more fuel-efficient and carbon friendly label. You can also search for hotels with green certifications there.



## Cut back on water and fabrics

Do you remember those probably-durable, probably-durable sheets and towels at your hotel? They're not just there for your convenience; they're also essential in drought-prone areas. Taking shorter showers under seven minutes on the average is a good rule of thumb.

As much as we love hoarding fancy amenities, many products in refillable containers, like shampoo and conditioner. Little hotel soaps, too—in the US, almost a million bars a day end up in the garbage. Hotels like Marriott International and Hilton Hotels & Resorts, among others, have partnered with Clean the World, one of the largest organizations to recycle, sanitize, and distribute leftover hotel soap to developing countries.

Side tangent: At this point, there is really no excuse for buying plastic water bottles either. Get yourself a Nalgene or other reusable water bottle of your choice. Take it with you to see the world. Start an Instagram account for it and pose it artfully in front of the many natural wonders it's helping to protect. Whatever makes you (and the earth) happy.



## Take time to volunteer and give back to local communities

According to *The New York Times*, “regenerative travel” is the industry buzzword of the moment. It's the notion that not only should you leave no trace, but you should in fact leave a place *better* than you found it.

One option is to carve out time on your vacation to volunteer. Hawaii launched a program called Malama Hawaii (malama meaning “to respect and care for” in Hawaiian), which invites travelers to join volunteer projects like self-guided beach cleanups, tree planting, quilt-making for elders, and ocean reef preservation.

Some resorts even offer incentives for participating: Upon completion of a three hour volunteer beach clean-up, the Four Seasons Maui rewards guests with a \$250 resort credit for their current stay, plus one night in an Ocean View Room during a future stay. (If you're interested, you can book through the hotel's concierge.)

# HAWAII MAGAZINE

## Give Back on Your Next Hawaiian Vacation with Mālama Hawai'i

Working in conjunction with hotels across the state, Mālama Hawai'i gives visitors a chance to care for the Islands—and get sweet deals.

APR 1, 2021

By Kevin Allen





# 2021 Campaign Calendar





**Mahalo**

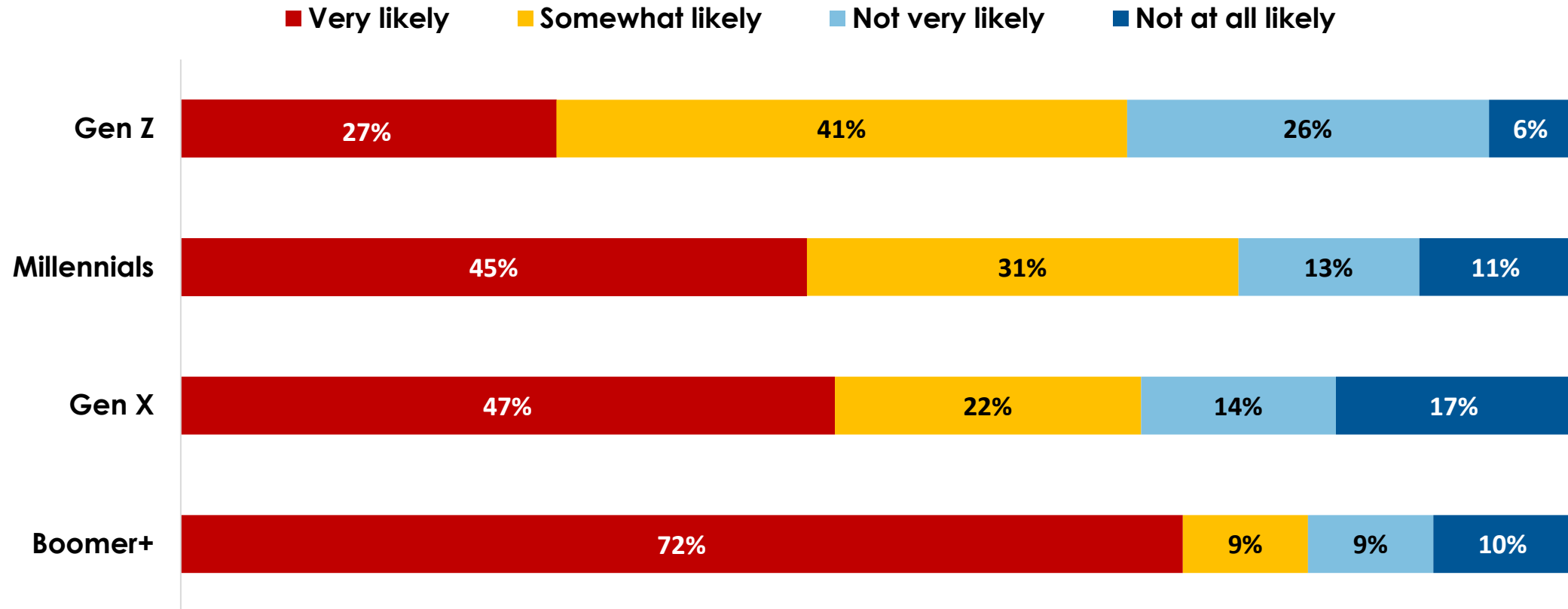


**Mālama Hawai'i Program Update**



# How likely are you to get a COVID-19 vaccine as soon as it becomes available?

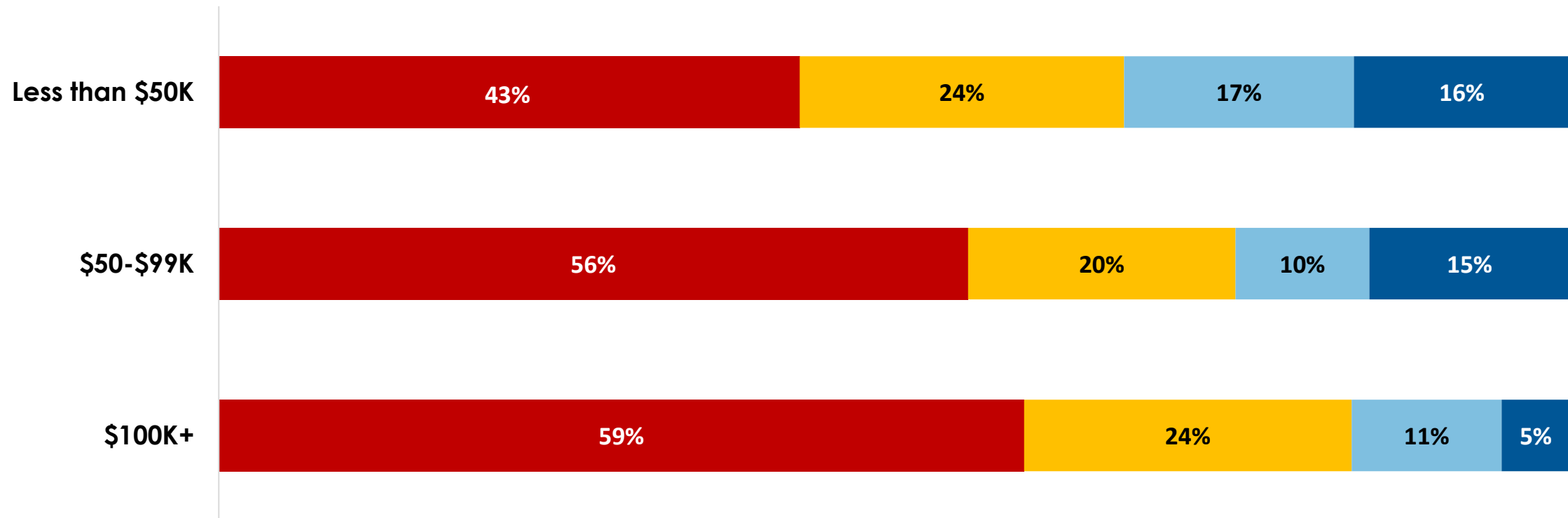
By Age



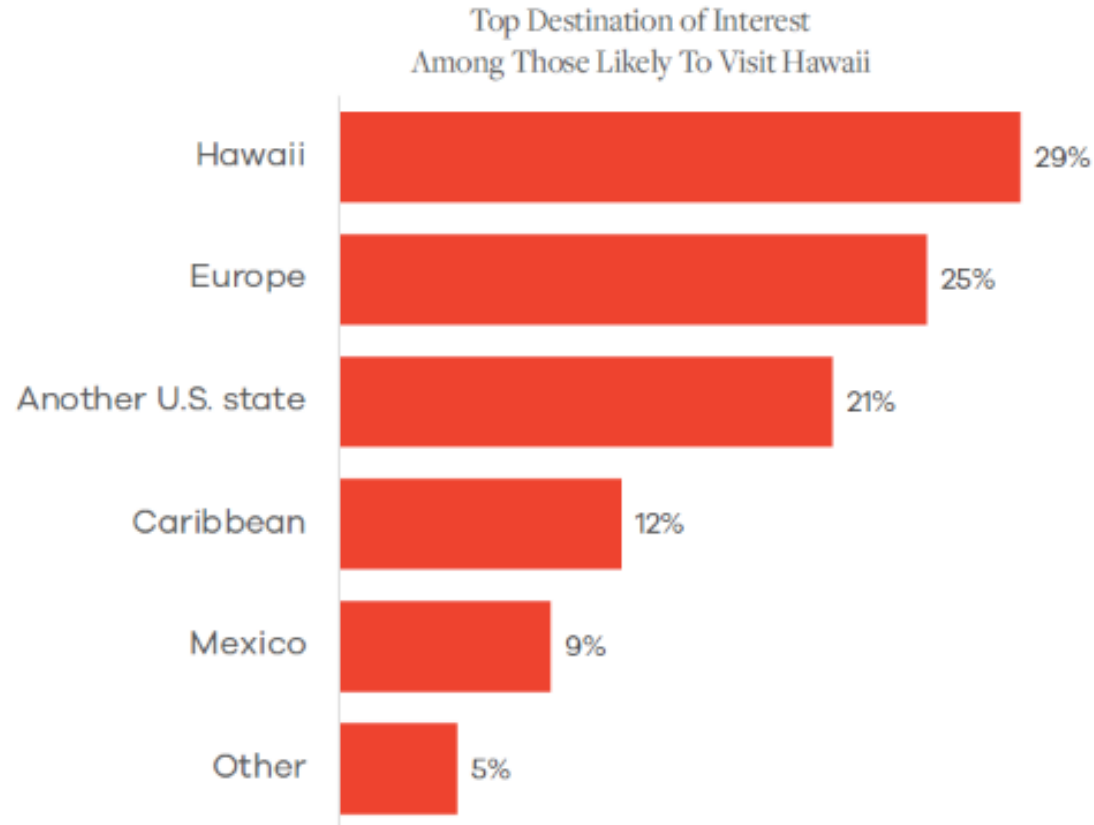
# How likely are you to get a COVID-19 vaccine as soon as it becomes available?

## By Income

Very likely    Somewhat likely    Not very likely    Not at all likely



# Hawai'i is the top destination of interest, once it is perceived to be safe to take a long-haul flight again



- **Those Likely to Visit Hawaii are more likely than U.S. Leisure Travelers to take a long-haul trip to Hawaii or Europe once they feel safe.** Among those likely to visit Hawaii, three in ten would choose to first visit Hawaii when they feel safe to take a long-haul flight again, followed by one-quarter who would visit Europe. Significantly more of those likely to visit Hawaii than U.S. Leisure Travelers cited Hawaii or Europe as their first long-haul trip, while significantly more U.S. Leisure Travelers than those likely to visit Hawaii plan to visit another U.S. state first.

	U.S. Leisure Travelers	Air Travelers	Likely to Visit Hawaii
Hawaii	20%	20%	29%
Europe	18%	22%	25%
Another U.S. state	36%	33%	21%
Caribbean	11%	11%	12%
Mexico	7%	7%	9%
Other	8%	6%	5%

Base: U.S. Leisure Travelers (n=4,171), Air Travelers (1,516), Likely to Visit Hawaii (n=794)  
Source: 2021 Portrait of American Travelers

**Question/** When you feel safe to take a long-haul trip by air again, where's the first place you want to visit?

# U.S. Resident Travel Sentiment Remains Low, Tourism Recovery Will Start Slowly

- 38.9 percent say they would feel somewhat or very unsafe traveling on a commercial airline right now.
- The average distance away from home for American travelers' commercial airline trip is reported to be 1,048 miles.
- 76.0 percent of travelers expressed some level of concern for the national economy.
- 58.1 percent of Americans say they have some level of concern about contracting the virus.



**Airline and  
Trade Outlook**

# Air Service Updates and Booking Pace

- January and February booking demand remains low. Signs of life for Spring Break and then more meaningful demand starting in June.
- One airline reported a significant increase in bookings to Hawai'i immediately following the CDC's recommendation for testing and quarantine of all international arrivals into the United States.
- Low mid-week travel demand remains a significant challenge. With fares so low overall, it is challenging to stimulate demand based on fare.
- Forecasting has been extremely challenging with booking windows.
- On a positive note, there are new markets opening for the first time United (Newark to Maui), Hawaiian (Orlando and Austin to Honolulu) and the resumption after many years of American (Charlotte to Honolulu).

# Travel Trade Wholesaler Updates and Booking Pace

- Hawai'i is showing signs of strength with bookings up considerably for 2021 during the week of January 18<sup>th</sup>.
- The trend across all partners is that of closer-in bookings.
- Continue to see cancelations for Q1, 2021, but seeing significantly less for Q2 and later.
- Overall domestic bookings are up, especially since the CDC's recent announcement for all resident and non-resident international arrivals into the U.S. must pre-test and quarantine for 10 days upon arrival.
- One partner commented that demand is relatively strong from Los Angeles, Texas, North Carolina and the NY Metro market.

## **Agenda Item #8:**

Presentation by HTJ including market insights, updates on airline booking pace, leisure and group segments and programs for the balance of this year





# ~Japan Market Update~

April 28, 2021

Eric Takahata | Managing Director

# Economy

2020

- Real GDP increase  
-4.8%
- Unemployment rate  
(average)  
2.3%
- Consumer price index  
-0.2%
- Consumer confidence  
31.8 (Dec)
- Exchange rate  
109.0¥
- Household savings  
Over 17.5M¥

**2.8%**

Real GDP  
increase  
(vs Q1 2020)

Q1 2021

**2.9%**

Unemployment  
rate (average)

2021 Feb

**0.3%**

Consumer  
price index  
(vs Previous Month)

2021 Feb

**33.8**

Consumer  
confidence

2021 Feb

**108¥**

Exchange  
rate

2021 Feb

OVER

**14.3M¥**

Household  
savings

# Japan's COVID19 Vaccination

**Japan Population: 126.5 million** (Japan has reserved doses to cover all population)

## Vaccine Schedule

- ❖ **2/17:** Medical Workers (est. 4 million)
- ❖ **4/12:** Senior\* (65+ years old, est. 36 million)
  - ❖ By end of June, completion of 2<sup>nd</sup> dose for senior citizens
- ❖ **Next:**
  - ❖ Person with underlying conditions (est 10.3 million)
  - ❖ Care-taker for senior facility (200K), 60-64 years old
- ❖ By September 2021, the government has secured vaccines for all citizens (16+ years old)

## Administrated as of 4/20

- ❖ 1st dose: over 1.39 million
- ❖ 2nd dose: over 800k



# Japan's COVID19 Cases Comparison

(as of 4/26)

## Population

United States	Japan	Hawai'i	Tokyo
330.14 million	125.9 million	1.41 million	14 million

## Cases of COVID-19 in the US, Hawai'i and Japan

	U.S.	Hawai'i	Japan
<b>Total Cases</b>	31,883,289	<b>31,991</b>	<b>566,863</b>
<b>Recovered</b>	NA	<b>NA</b>	<b>504,738</b>
<b>Deaths</b>	569,272	<b>478</b>	<b>9,972</b>

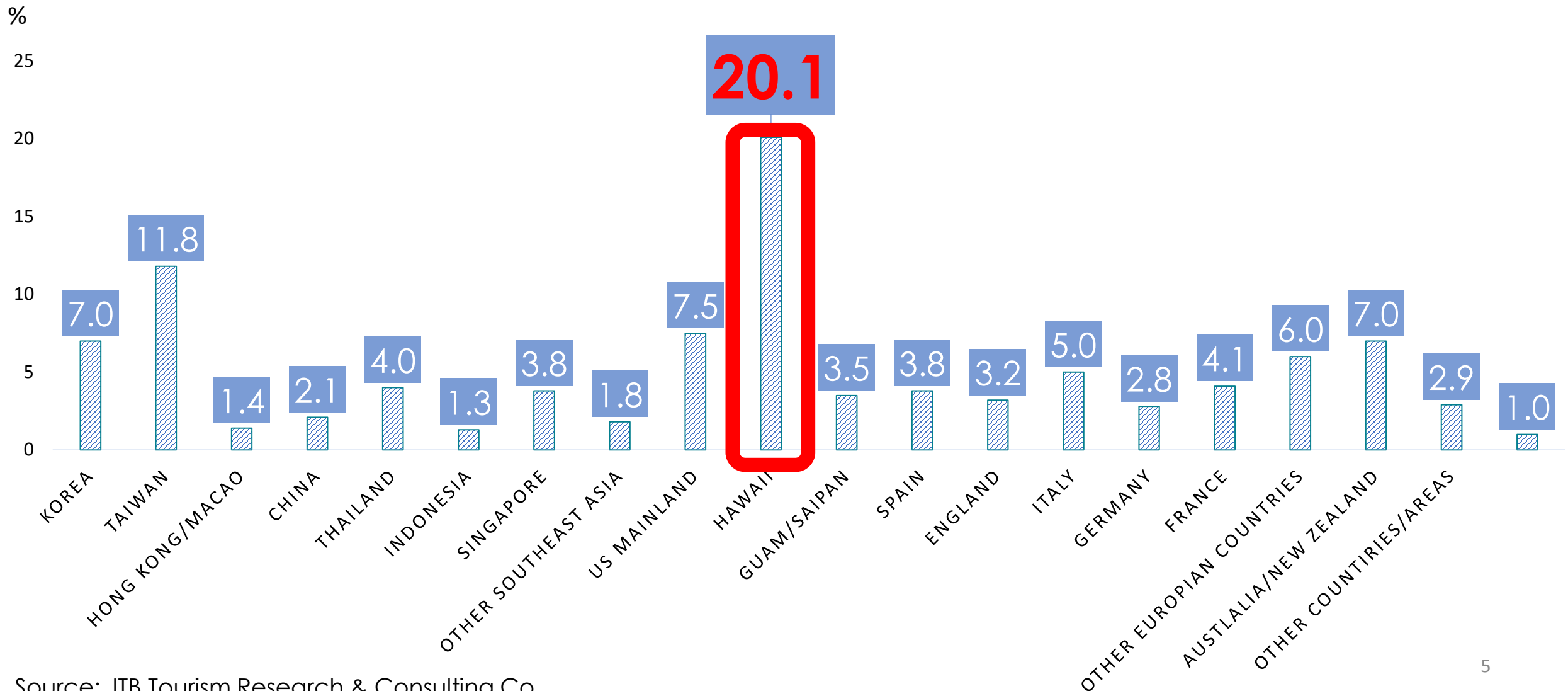
## Comparison of cases in Hawai'i and Japan per capita (100,000)

	Hawai'i	Japan
<b>Confirmed Cases</b>	<b>2,259</b>	<b>451</b>

# Consumer Sentiment

(n=2,187)

Q: Countries/Regions People Would Like to Visit First Once Overseas Travel Resumes



# Consumer Sentiment

(n=2,187)

## Countries/Regions that People Want to Visit by Gender and Age

### Male

	15 – 29 years old	30 – 39 years old	40 – 49 years old	50 -59 years old	60+ years old
<b>#1</b>	<b>Hawai'i (15.8%)</b>	<b>Hawai'i (24.4%)</b>	<b>Hawai'i (21.4%)</b>	<b>Hawai'i (22.5%)</b>	<b>Hawai'i (16.5%)</b>
<b>2</b>	US Mainland (12.8%)	Taiwan (13.8%)	Taiwan (13.5%)	Taiwan (11.5%)	Taiwan, Other in Europe (11.5%)
<b>3</b>	Taiwan (10.8%)	US Mainland (12.4%)	Australia/New Zealand (10.2%)	Thailand (9.3%)	Thailand (8.3%)

### Female

	15 – 29 years old	30 – 39 years old	40 – 49 years old	50 -59 years old	60+ years old
<b>#1</b>	<b>Hawai'i (19.7%)</b>	<b>Hawai'i (24.5%)</b>	<b>Hawai'i (17.3%)</b>	<b>Hawai'i (22.1%)</b>	<b>Hawai'i (16.9%)</b>
<b>2</b>	South Korea (16.8%)	Taiwan (12.0%)	Taiwan (12.9%)	South Korea (12.2%)	Other in Europe (12.7%)
<b>3</b>	Taiwan (10.6%)	South Korea (11.1%)	Other in Europe (9.3%)	Taiwan (10.8%)	Taiwan (9.7%)

# Travel Conditions



All travelers, including returning Japanese nationals are required:



- To submit a proof of a negative PCR Test for all entry into Japan



- To quarantine for 14 days

# Airlines Situations



2021 April				
Op Airline Name	Flight #	Origin Code	Total Flights	Seats
All Nippon Airway	NH 186	HND	9	2,214
Hawaiian Airlines	HA 822	NRT	14	3,892
Hawaiian Airlines	HA 450	KIX	5	1,390
Hawaiian Airlines	HA 864	HND	0	0
Japan Airlines	JL 74	HND	7	1,302
ZIPAIR Tokyo	ZG2	NRT	0	0
			<b>35</b>	<b>8,798</b>

## Total Flights # by airport

- ❖ Haneda-16
- ❖ Narita-14
- ❖ Kansai-5

7 to 8 flights per week

2021 May				
Op Airline Name	Flight #	Origin Code	Total Flights	Seats
All Nippon Airway	NH 186	HND	9	2,214
Hawaiian Airlines	HA 822	NRT	13	3,614
Hawaiian Airlines	HA 450	KIX	4	1,112
Hawaiian Airlines	HA 864	HND	0	0
Japan Airlines	JL 74	HND	8	1,488
ZIPAIR Tokyo	ZG2	NRT	TBA	TBA
			<b>34</b>	<b>8,428</b>

## Total Flights # by airport

- ❖ Haneda-17
- ❖ Narita-13
- ❖ Kansai-4

7 to 8 flights per week

2021 June				
Op Airline Name	Flight #	Origin Code	Total Flights	Seats
All Nippon Airway	NH 186	HND	8	1,968
Hawaiian Airlines	HA 822	NRT	13	3,614
Hawaiian Airlines	HA 450	KIX	4	1,112
Hawaiian Airlines	HA 864	HND	0	0
Japan Airlines	JL 74	HND	9	1,674
ZIPAIR Tokyo	ZG2	NRT	TBA	TBA
			<b>34</b>	<b>8,368</b>

## Total Flights # by airport

- ❖ Haneda-17
- ❖ Narita-13
- ❖ Kansai-4

7 to 8 flights per week



# Travel Industry Outlook



- Major wholesaler package products will be available from July 1 arrival to Hawai'i and will focus sales promotion for Summer onward
- Suspended airlines routes targeting resumption for summer 2021
- Managed Travel concept within Ministry of Tourism moving forward

# Competitive Destinations

Destination	Promotion
<b>Hong Kong</b>	Tourism recovery strategy plan for mid-long (2021-2022) Recovery budgets: \$145 million
<b>Singapore</b>	Promotion with Netflix to showcase Singapore Movies
<b>Taiwan</b>	1) Instagram photo campaign with City Living magazine 2) Taiwan Food campaign collaboration with Taiwanese restaurant in Japan between 4/23-5/9
<b>Thailand</b>	Introduction of quarantine period outdoor activity plan (golf, yacht, etc)
<b>New Zealand</b>	“2021 Kiwi Connection Japan” online seminar for Travel Trade on 4/7 & 4/21
<b>Australia</b>	1) TV commercial and SNS campaign starting from March 2) Launched special site of “Conscious Travel”

# HTJ Initiatives ~Mālama Hawai'i~

# Microsites – Mālama Hawai‘i

<http://www.allhawaii.jp/malamahawaii>



MĀLAMA  
HAWAII

地球にやさしい旅を



Re-Imagine  
Hawai'i



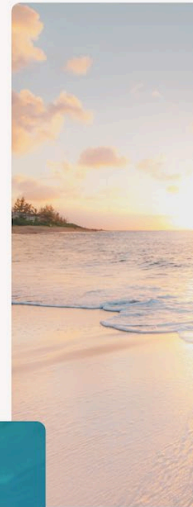
## Embrace Malama

“マラマ、思いやりの心でハワイの伝統や文化を受け入れる。”

Mālama Hawai'i “マラマハワイ”は、ハワイを思いやる心。レスポンシブルツーリズムのハワイ版スローガンです。

マラマとはハワイのことばで「思いやりの心」。何十年後も、何百年後もハワイが持つ素晴らしい伝統文化や美しい自然環境を守っていくために、ハワイ州では様々な取り組みが行われています。

マラマハワイとは

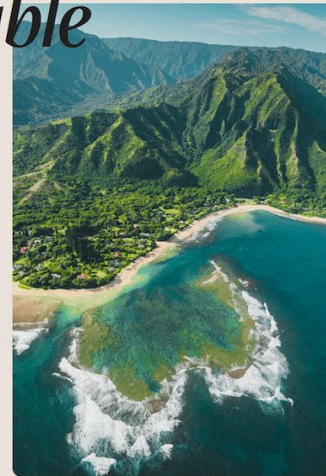


## About Responsible Tourism

責任ある観光によって、観光地を守ろうという考え方。

レスポンシブルツーリズム(責任ある観光)とは、観光客もツーリズムを構成する要素であると捉え、観光客が意識や行動に責任を持つことで、より良い観光地形成や地域や環境へ負荷を与えてしまうかも知れないことを認識し、自律した行動を実践していく、これからの観光のカギです。近年、観光地が起きている環境問題や住民とのトラブル、2015年より始まったSDGsの取り組み、2020年の新型コロナウイルスのパンデミックの影響を受け、世界の観光産業はレスポンシブルツーリズムの方向へ舵を切る動きが急速に広がっています。

責任ある観光「レスポンシブルツーリズム」とは



## Responsible Tourism

2000年代に入って生きる観光の考え方は、このための重要なカギとなつてきました。レスポンシブルツーリズムという考え方のWEBサイトが実践できることの取り組みを紹介して

レスポンシブルツーリズムを思いやる心が求められます。レスポンシブルなため、ハワイ版のスローガンになりました。



責任ある旅行者へ

## Be a Pono Traveler

Pono(ポノ)とは、ハワイのことばで「善良性、親切心、真心、モラル、良質、適切、正しい、優秀、健康で幸福な状態、繁栄、本質、正義」などたくさん意味を持ちます。一言で言えば「正しい状態」のことです。物事が自然環境、人間関係が、精神状態が、健康状態が、ちよいどのバランスの、調和のとれた状態を指します。何か判断をするとき、迷ったときに「ポノであるか?」ハワイの人が指針とする、よく使うシンボルだけに意味の深い言葉です。レスポンシブルツーリズムを実現する旅行者は、まさに「Pono Traveler(ポノトラベラー)」といえるでしょう。ハワイに限らず世界中でポノトラベラーが増えること。観光地と旅行者が本来あるべき正しい家、良い関係性をつくること。観光地が私たちハワイ州観光地の願いであり、使命であると考えています。さあ、あなたもレスポンシブルツーリズムを実現する「ポノトラベラー」になりませんか?

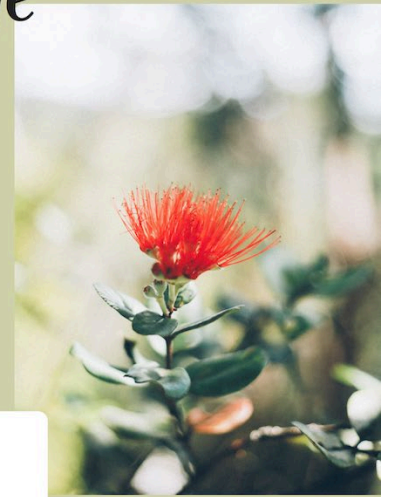
ハワイ州観光局からのメッセージ

ハワイ独自の取り組み「アロハプラスチャレンジ」について

## Aloha + Challenge

SDGsを基準にハワイ州のゴールを設定した特別プログラム

アロハプラスチャレンジは、国連が実効する持続可能な開発目標(Sustainable Development Goals: SDGs)を基準として、ハワイの持続可能な目標を達成するために州全体の取り組みとして設定された、地域主導の特別プログラムです。



アロハプラスチャレンジのあゆみ

## History

1976年、ハワイの自然や文化遺産を保護していく概念「マラマハワイ(Mālama Hawai'i)」を源流として具体的な取組が立てられました。

2011年にホテルで開催されたアジア太平洋経済協力会議(APEC)では、経済、社会、環境の優先事項に取り組み、2030年までに持続可能な社会目標を達成することを目指すプロジェクト「[ハワイグリーンリングローズ](#)」構想が掲げられました。

そして2014年には、ハワイ州が持続可能な社会の実現に向けて進める6つの取組を掲げる社会目標「アロハプラスチャレンジ」が定められました。2015年9月に国連総会で持続可能な開発目標(SDGs)が正式に採択されると、2018年11月にはハワイグリーンリングローズ構想が国連SDGs(Local2030)のプロジェクトハブに、島として、そして太平洋諸島としてはじめて認定されました。



# Microsites – Mālama Hawai‘i

ハワイ州 レスポンシブルツーリズム 情報サイト

Mālama Hawai‘i

旅行者にできること 取組み紹介 関連映像 コミュニティ 特集

マラマハワイとは

すべて 海 自然 エコ活動 イベント ボランティア カルチャー その他

## What travelers can do

美しいハワイを守るために、旅行者のみなさんにできることはたくさんあります。持ち物、森林の歩き方、海洋生物との接し方、アクティビティへの参加。旅行者の皆さんのアクションが、ハワイの美しさを保つことに繋がります。

その他

ハワイ・リージョナル・キューズ〜ハワイの地産地消〜

イベント

メリー・モナーフ・フェスティバル (Merrie Monarch Festival)

エコ活動

ハイキングのマナー

カルチャー

ハワイで一度は身に履きたいレイメイキングのレッスンに参加してみよう!

## Initiatives

美しいハワイを守るために、持続可能な観光地にするために、企業やNPO団体が、保全活動や啓蒙活動、教育プログラムの提供などさまざまな活動を行っています。その一部をご紹介します。

すべて 企業 ハワイ州観光局 コミュニティ

ハワイ州観光局

マリオット・サ・ワイキキ・コレクション

クアロアランチ・ハワイ

biki

サステナブルな生活をしたい〜上マワイ州が目指している6つのチャレンジとは... | POOLO HAWAII CAMP (1日目)

マリオット・サ・ワイキキ・コレクションが取り組む緑樹活動

クアロアランチが取り組むサステナブルな活動

地球に優しい新交通バイクシェアサービス"biki"

コミュニティ&パートナー紹介

## Communities

ハワイには自然や文化などを守るために活動する団体が多くあります。ここでは、自然保護活動を行う団体、教育プログラムを提供するNPO、文化継承の取り組みを行っている施設などを紹介しています。

<p>HO'OKUA'AINA nurturing lives since the ground up</p> <p>ホオクアアイナ (Ho'okua'aina)</p>	<p>HAWAII Forest Institute</p> <p>ハワイフォレスト・インスティテュート (Hawaii Forest Institute)</p>	<p>NORTH SHORE COMMUNITY LAND TRUST</p> <p>ノースショア・コミュニティランドトラスト (North Shore Community Land Trust)</p>	<p>ナショナル熱帯植物園 (National Tropical Botanical Garden)</p>	<p>KAUAI MUSEUM</p> <p>カウアイミュージアム (Kauai Museum)</p>
<p>mālama maunaloa</p> <p>マラマ・マウナラア (Mālama Maunaloa)</p>	<p>HAWAII LAND TRUST</p> <p>ハワイランドトラスト (Hawaii Land Trust)</p>	<p>IMILOA Astronomy Center</p> <p>イミロア天文学センター (Imiloa Astronomy Center of Hawaii)</p>	<p>CORAL REEF ALLIANCE</p> <p>コーラル・リーフ・アライアンス (The Coral Reef Alliance)</p>	<p>blue planet FOUNDATION</p> <p>ブループラネット財団 (Blue Planet Foundation)</p>
<p>Paepae o He'eia</p> <p>パエパエ・オ・ヘ・エイア (Paepae o He'eia)</p>	<p>ポリネシア航海協会 (Polynesian Voyaging Society)</p>	<p>IOLANI PALACE</p> <p>イオラニ宮殿 (Iolani Palace)</p>	<p>IOLE</p> <p>イオレスチュワードシップ・センター (Iole Stewardship Center)</p>	<p>KUPU</p> <p>クパ・ハワイ (KUPU Hawaii)</p>
<p>MĀNOA HERITAGE CENTER</p> <p>マノア・ヘリテージ・センター (Mānoa Heritage Center)</p>	<p>BISHOP MUSEUM</p> <p>ビショップミュージアム (Bishop Museum)</p>	<p>アハ・プナナ・レオ (Aha Pūnana Leo)</p>	<p>sustainable coastlines Hawaii</p> <p>サステナブル・コースト・ラインズ・ハワイ (Sustainable Coastlines Hawaii)</p>	

関連映像

## Movies

ハワイの魅力と、皆さんに知ってもらいたいことを、映像でお届けしています。ハワイの空気を感じながら、ハワイを思いやる心〜マラマハワイ〜にも触れてください。心に響くものがあればぜひSNSでシェアしてください。

すべて プロモーション 自然環境 ハワイ文化保護 イベント・活動 インタビュー その他

自然環境 Natural Environment

すべてを見る

自然環境

Hawai'i Connection〜フィッシュボンド編〜

自然環境

Share the Aloha-オアフ島-ハイキングトレイル-

自然環境

MĀLAMA HAWAII  
〜サンゴ礁を守ろう〜

自然環境

Share the Aloha-オアフ島-海の環境-

自然環境

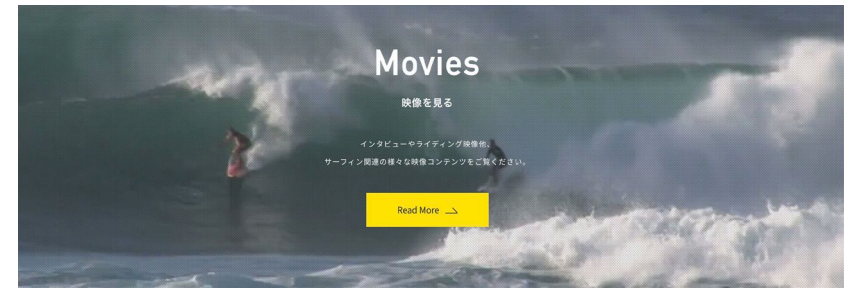
Share the Aloha-オアフ島-ビーチ-

「Mālama Hawai'i (マラマハワイ)」とはハワイの島々を思いやる気持ちです。ハワイは日本と同じく海に囲まれた島であり、人々は海と共存しています。州

# — MĀLAMA — HAWAII' I

地球にやさしい旅を

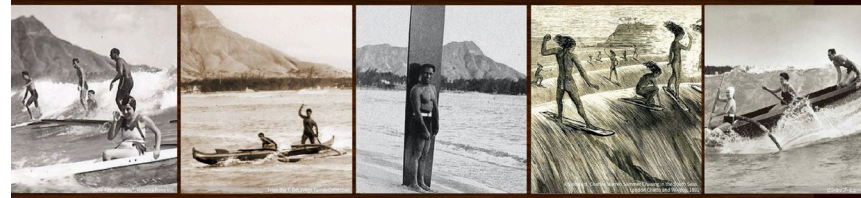
# Microsites – Surfing in Hawai'i



### Surfers

サーファー紹介

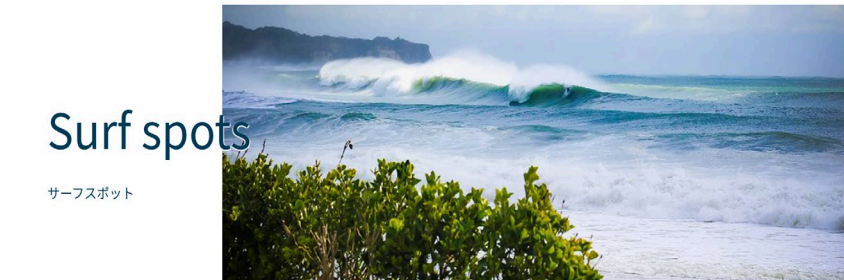
<p><b>NE W</b> Legend Duke Kahanamoku デューク・カハナモク</p>	<p><b>NE W</b> Legend Eddie Aikau エディ・アイカウ</p>	<p>Legend Andy Irons アンディ・アイアズ</p>	<p>Legend Ben Aipa ベン・アイバ</p>
<p>Legend Laird Hamilton レイアード・ハミルトン</p>	<p><b>NE W</b> Hawaii Local Surfers John John Florence ジョン・ジョン・フローレンス</p>	<p><b>NE W</b> Hawaii Local Surfers Carissa Moore カリッサ・ムーア</p>	<p>Hawaii Local Surfers Seth Moniz セス・モニーツ</p>



### Lifestyle

- ライフスタイル -

<p>クアロアビーチ (Kualoa Beach)</p>	<p>SHISEIDO BLUE PROJECT 海の環境を守る、アクション</p>	<p>ウェイド・トコロ (Wade Tokoro)</p>	<p>エデュアルド・ボリオリ (Eduardo Bolioli)</p>
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# WEAR ALOHA, SAVE ALOHA.

Designers in Hawai'i collaborated on aloha-inspired motifs



**Jack Soren**

~Protect the ocean from marine pollution~



**Kim Sielbeck**

~Protect Hawaiian endemic species~



# Microsite - Hōkūle‘a

**Mālama Honua**

ハワイの自然環境保護をテーマにしたウェブサイト

マラマニアについて

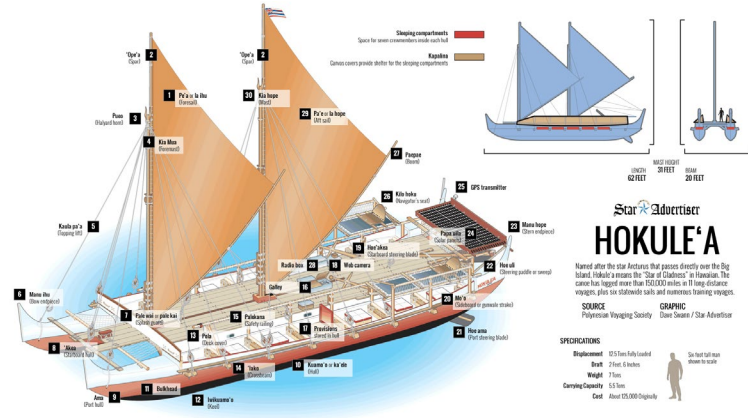
世界遺産 伝統航海の成り イベント・ツアー 展覧会 セミナー

ホクレー号  
それは、  
地球を思いやるハワイの心  
それは、  
ハワイの誇り、プライド  
先人たちの教習が詰まった航海術  
消滅の危機を乗り越え、  
復活を遂げた双胴船  
ふたたび太平洋航海へ

ホクレー号とは

伝統航海術を通して地球環境を守る

ゲームです。青い海とサンゴ礁。このようにハワイを自然を守る必要も、現在求めらるべき自然環境の状況にもあります。そんな今、ハワイの島々の自然や文化を守り、現地住民が大切にしている場所を愛し、美しいハワイを未来へつなげていくことの重要性が求められています。『レスポンスブルーム』についてこのサイトを通じて是非考えてみてください。



Launch 6/8, 2021  
(World Ocean Day)



POLYNESIAN VOYAGING SOCIETY

**MOANANUIĀKEA**

A VOYAGE FOR THE PACIFIC

**VOYAGE MAP**

PROPOSED ROUTE

**VOYAGE DETAILS:**

- 42 months
- 41,000 miles
- 46 countries & archipelagoes
- 345 ports



MOANANUIĀKEA

one Ocean one People one Canoe

PRESENTED BY THE POLYNESIAN VOYAGING SOCIETY & OIWI TELEVISION NETWORK  
IN ASSOCIATION WITH PALUKI DOCUMENTARY FILMS

MUSIC: JOSH MYERS FEATURING NAINOA THOMPSON, BRUCE BLANKENFELD, KALEPA BAYBAYAN, KĀTULANI MURPHY, JENNA ISHII, KALEO WONG, LEHUA KAMALU & HAUNANI KANE

KAMAHAMANA SCHOOLS

HAWAII TOURISM AUTHORITY

OIWI Kai

AMA OLUKAI



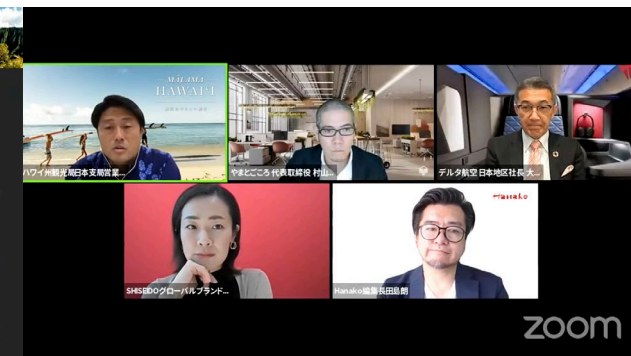
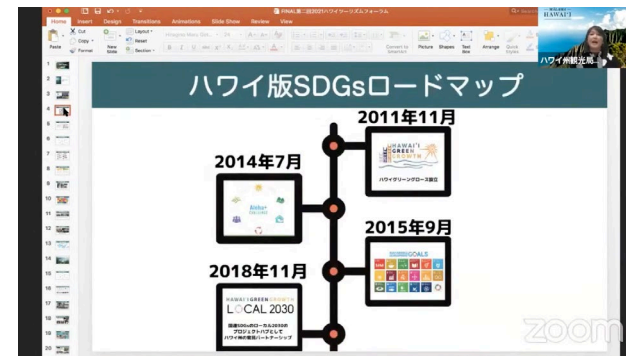
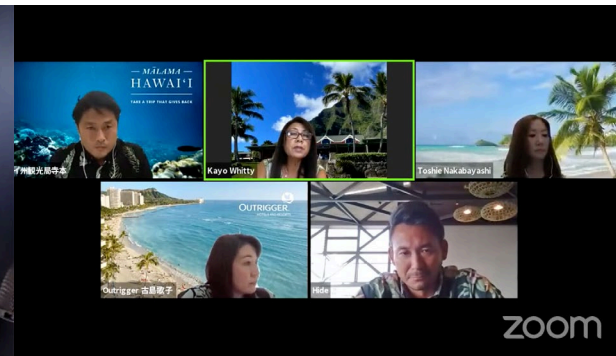
# Hawai'i Tourism Forum

## 1st HTF: 3/17, COVID19 situations in Hawai'i (as of 4/21)

- Total 764 LIVE participants
- Close to 2,279 views
- 45 media exposure, 1,292,982,967 Impression、 AVE\$182,391

## 2nd HTF: 4/21, SDGs x Hawai'i (as of 4/21)

- Total 782 LIVE participants
- Close to 1,069 views
- 49 media exposure, 1,479,487,523 Impression、 AVE\$182,280

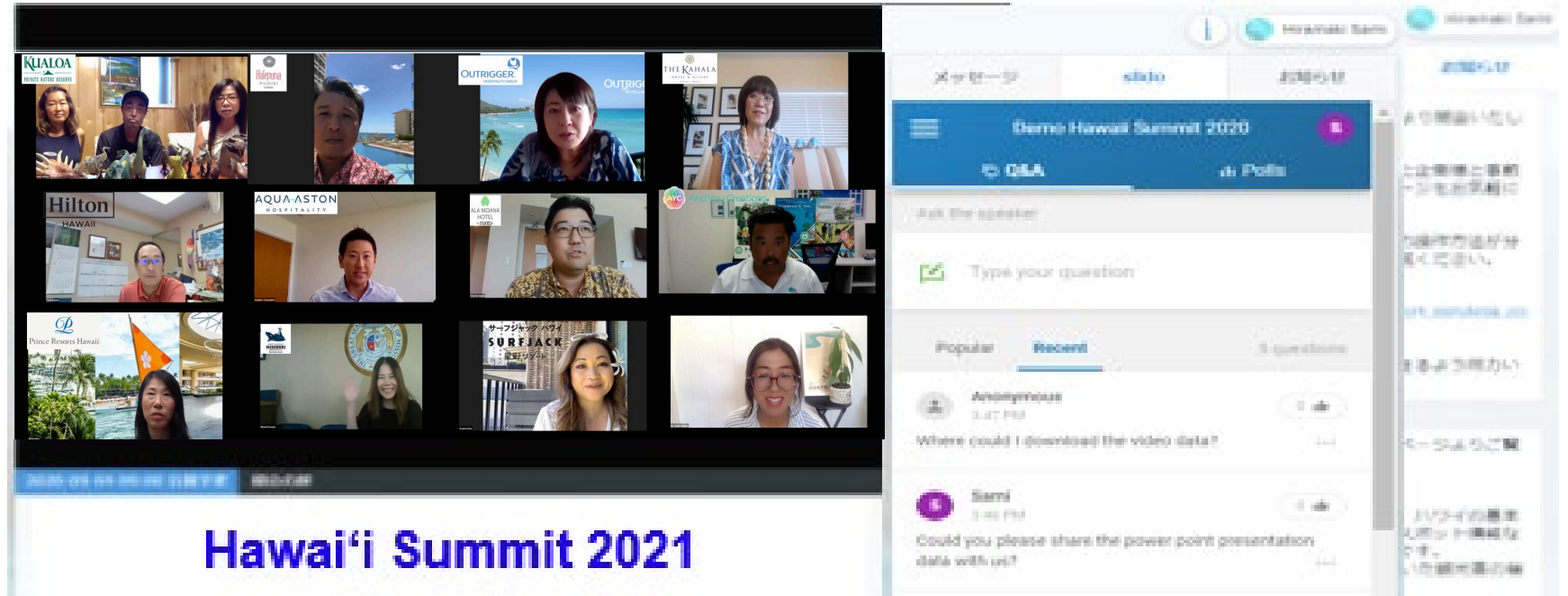


# Hawai'i Japan Summit (September 2021)

## Hawai'i Japan Summit

### Program:

- Keynote speech
- Market Update
- Partner B2B session
- FAM tour



# Hawai'i Expo Virtual Event (Q4 2021)



TIME SCHEDULE	タイムスケジュール
10:00-10:45	セルソン博覧会
11:00-11:45	アコニシ博覧会
12:00-12:45	アコニシ博覧会ブース
13:00-13:45	アラモアナホテル博覧会
14:00-14:45	ハレクラニ博覧会
15:00-15:45	ハイアット博覧会
16:00-16:45	マリノット博覧会



Booth image



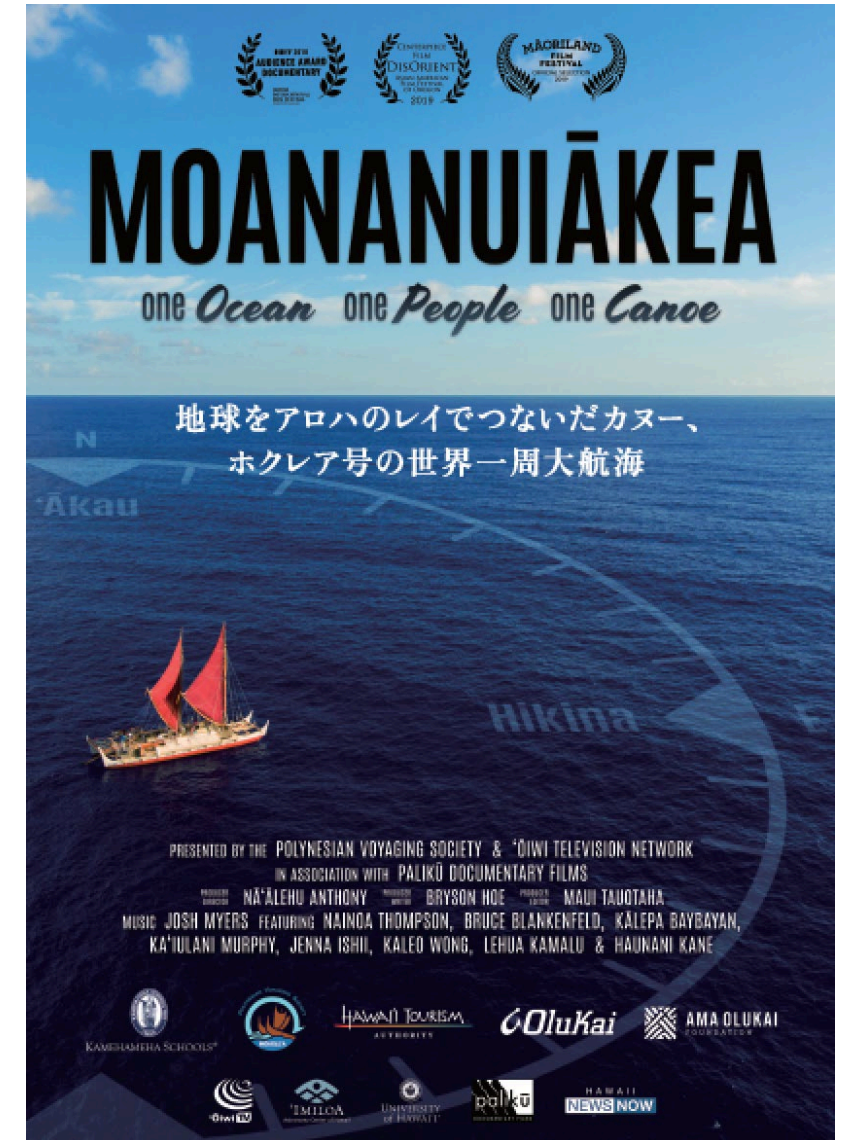
Stage Image

- Entertainment Stage
  - Partner's Booth
  - Seminar & Workshop area
  - E-commerce/Shops area
- And more

# Hōkūle‘a Education Program (Q3-Q4 2021)

Hōkūle‘a movie showcase & Education hybrid seminars (Real & Online) in 2021

- MICE focus initiatives especially Edu-Tourism targeting 2021 onward group businesses
- Strengthen Sister cities
- Support Polynesian Voyaging Society's next voyaging in 2022 - 2026



# 9 HTJ Staff

	Name	Title	Job Description
 <b>Hawaii</b>	Eric Takahata	Managing Director	Oversee contract management, owner of contract entity
	Mitsue Varley	Country Director, Japan	Overall strategy, planning and budgets, Manage 2 offices (Hawaii & Japan)
	Kimiko Quan	Sales & Marketing Manager	Community relations, Executive Assistant
	Ayako Ishiwari	PR Manager	Asset Management, Digital Marketing
 <b>Japan</b>	Ryuta (Luke) Teramoto	Director of Sales	Travel Trade (Leisure & MICE) in-charge
	Ayaka Takahashi	Marketing Manager	Branding, Advertising, In-market direct consumer initiatives, Aloha Program
	Sami Hiramaki	Event Manager	Event Promotion
	Sae Miyamoto	Assistant Sales Manager	Assisting Director of Sales & Travel Trade Website development
	Manami Saito	Sales & Marketing Coordinator	Support Sales & Marketing initiatives, Administration and Information service

A person is pouring water from a brown ceramic pitcher with blue patterns into their hands. The scene is set in a grassy field with a small pink flower in the foreground. The text is overlaid on the image.

— MĀLAMA —  
HAWAII

地球にやさしい旅を

## **Agenda Item #9:**

HTA Branding Budget Discussion and Action

**75% Reduction to Monthly Fixed Costs (Effective 6/1/2021)**

	Current Annual Budget	Current Monthly Fixed Costs	Revised Fixed Costs (75% reduction)	Reduction Per Month	Total Reduction for 7 Months (Jun-Dec)	Financial Penalty
US	\$17,000,000	\$576,025				
Japan	\$4,500,000	\$170,933	\$42,733	\$128,200	\$897,400	\$1,162,000
Canada	\$400,000	\$14,370	\$3,593	\$10,778	\$75,443	\$33,000
Oceania	\$400,000	\$12,866	\$3,217	\$9,650	\$67,547	\$44,022
Korea	\$300,000	\$9,875	\$2,469	\$7,406	\$51,844	\$0
<b>Total</b>	<b>\$22,600,000</b> [\$5,600,000 not incl. US]	<b>\$784,069</b> [\$208,044 not incl. US]	<b>\$52,011</b>	<b>\$156,033</b>	<b>\$1,092,233</b>	<b>\$1,239,022</b>

**Contract Termination (Effective 5/1/2021)**

	Financial Penalty	Re-Start Up Cost	YTD Exp. (Est. Jan-Apr)	Total Payment (YTD Exp. + Penalty)
Japan	\$1,332,933	\$250,000	\$699,843	\$2,032,776
Canada	\$49,385	\$20,000	\$58,305	\$107,690
Oceania	\$63,256	\$10,000	\$56,823	\$120,079
Korea	\$17,780	\$0	\$42,399	\$60,179
<b>Total</b>	<b>\$1,463,354</b>	<b>\$280,000</b>	<b>\$857,370</b>	<b>\$2,320,724</b>

**2021 MMA Budget - HTA Restriction on Release of Funds**

	2019 Annual Budget	2021 Annual Budget	Restriction	2021 Restricted Annual Budget
Japan	\$9,000,000	\$4,500,000	\$2,500,000	\$2,000,000
Canada	\$800,000	\$400,000	\$200,000	\$200,000
Oceania	\$1,900,000	\$400,000	\$200,000	\$200,000
Korea	\$1,400,000	\$300,000	\$100,000	\$200,000
<b>Total</b>	<b>\$13,100,000</b>	<b>\$5,600,000</b>	<b>\$3,000,000</b>	<b>\$2,600,000</b>