



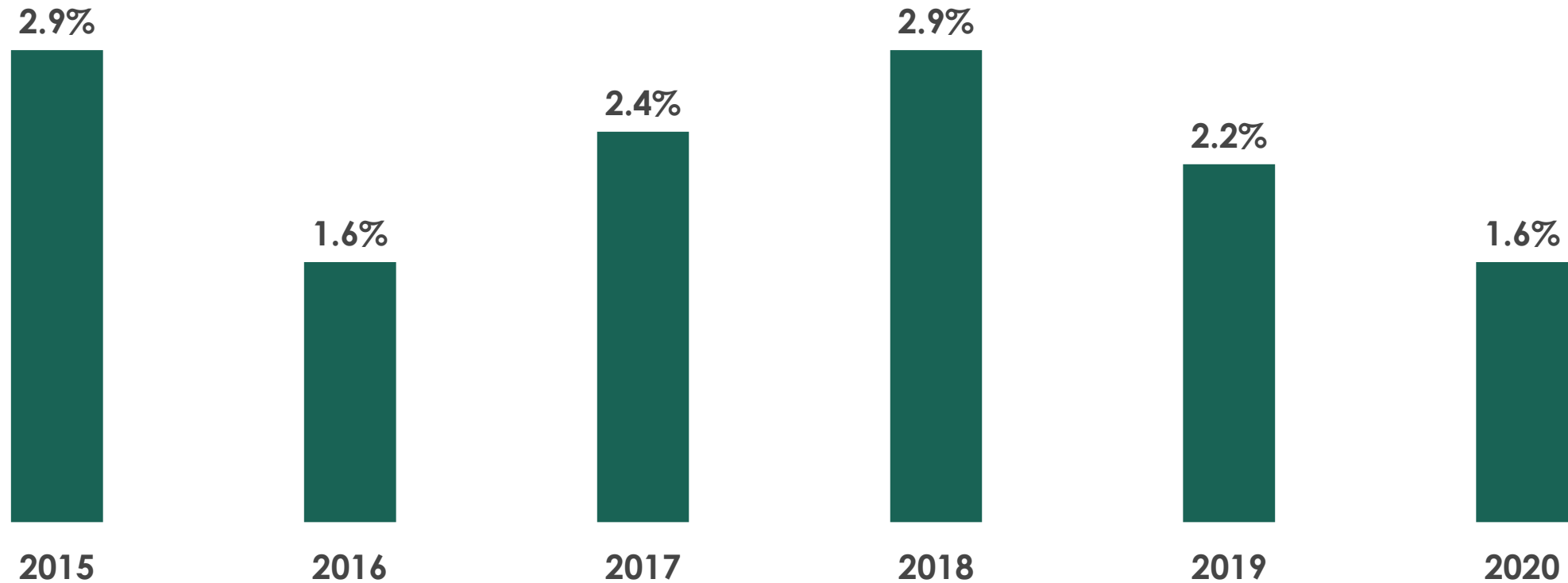
FALL TOURISM UPDATE

Jay Talwar
Chief Marketing Officer



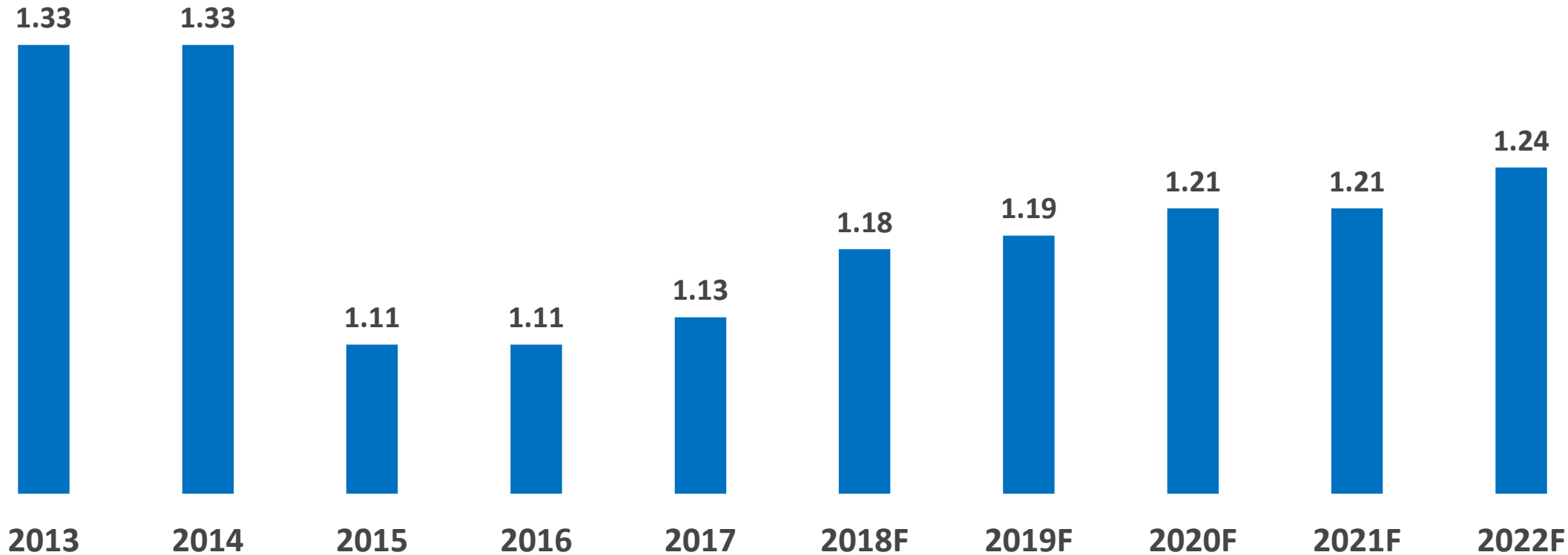
MARKET CONDITIONS

YEAR-OVER-YEAR U.S. GDP GROWTH



Source: HVCB analysis of Economist Intelligence Unit 09/2019

U.S. DOLLAR FORECASTED TO GROW AT SLOWER RATE



Source: HVCB analysis of Economist Intelligence Unit data as of 1/2019

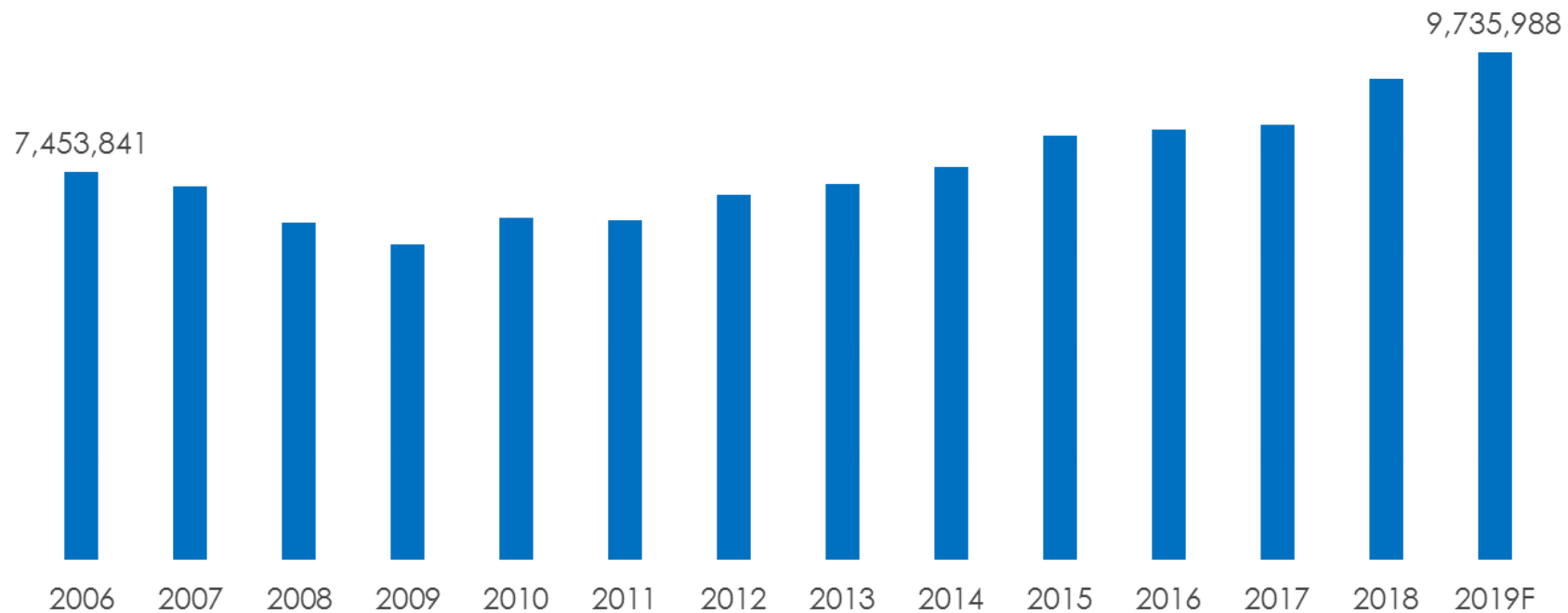
U.S. ARRIVALS & SPEND AS OF Q3 2019P

	Expenditures	PPPD	Visitor arrivals
U.S. West	\$5.17 billion (+5.3%)	\$173.79 (-1.32%)	3.46 million (+10.5%)
U.S. East	\$3.59 billion (+2.5%)	\$212.08 (1.19%)	1.75 million (+4.0%)
Total U.S.	\$842 billion (+4.1%)	\$187.68 (-0.52%)	5.21 million (+8.2%)

Source: HVCB analysis of HTA Q3 2019P data

NONSTOP AIR SEATS TO HAWAI'I HIT RECORD HIGHS IN 2019

Scheduled nonstop air seats U.S. Mainland to Hawai'i



Source: HVCB analysis of Diio Mi data

U.S. AIRLIFT GROWTH CONTINUES

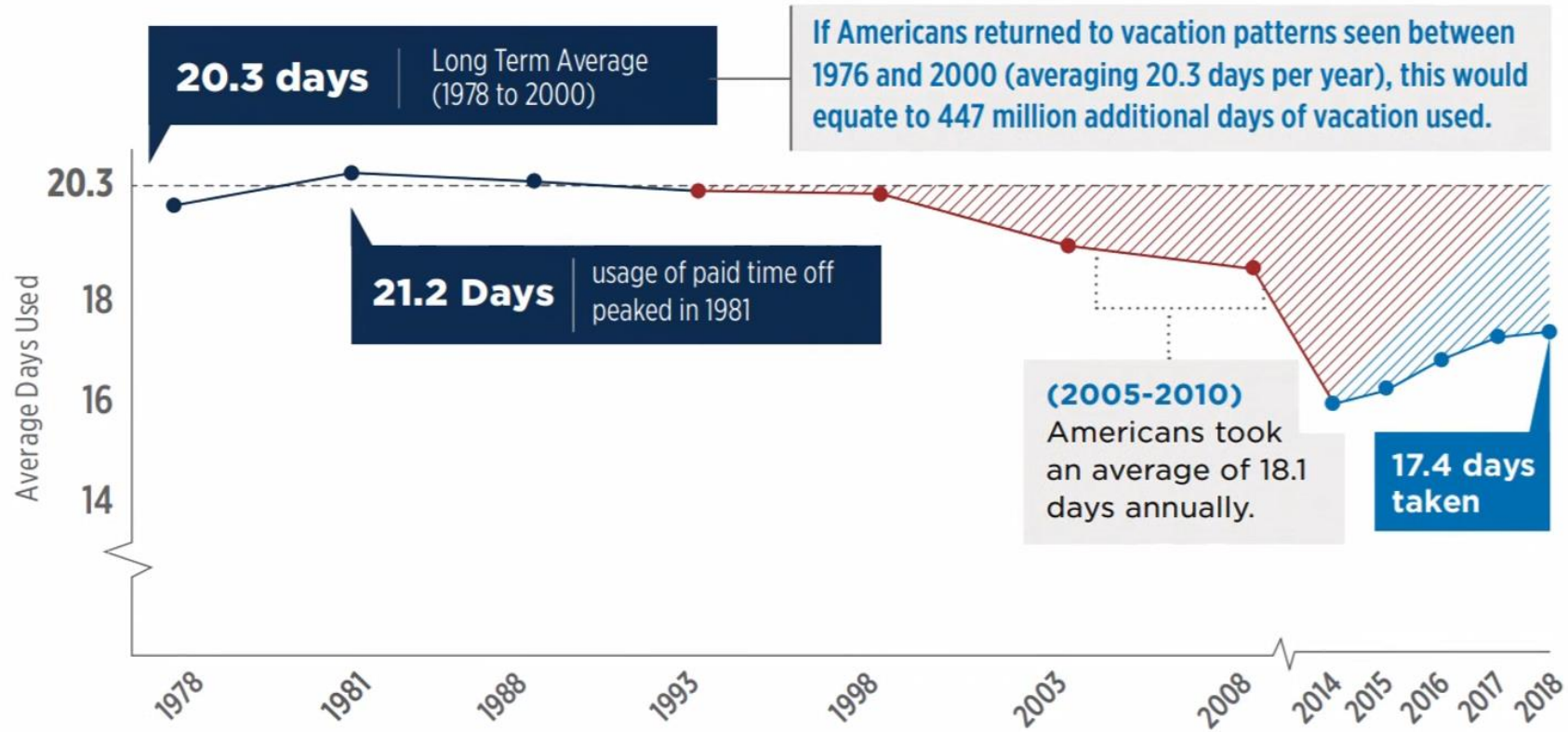
	2018	2019F	Volume Change	Percent Change
Alaska Airlines	1,689,975	1,770,772	+81,086	+4.8%
American Airlines	1,420,718	1,425,763	+5,045	+0.4%
Delta Air Lines	1,195,571	1,137,366	-58,205	-4.9%
Hawaiian Airlines	2,268,013	2,352,206	+84,193	+3.7%
Southwest Airlines		284,025	N/A	N/A
Sun Country	16,632	47,139	+30,507	+183.4%
United Airlines	2,628,724	2,728,919	+100,156	+3.8%
Total	9,219,633	9,746,190	+526,557	+5.7%

OUTBOUND U.S. OVERSEAS TRAVELER MARKET SHARE 2018 VS 2017

	Total U.S. Outbound Travelers			Market Share of Outbound U.S. Travelers		
	2018	2017	Percent Change	2018	2017	Point Change
Hawai'i	6,368,851	5,841,530	+9.0%	10.1%	9.9%	+0.2 pt
Mexico (by air)	10,075,187	9,810,713	+2.7%	16.0%	16.7%	-0.6 pt
Caribbean	8,702,217	8,320,516	+4.6%	13.9%	14.2%	-0.3 pt
Europe	17,742,258	15,792,769	+12.3%	28.2%	26.9%	+1.4 pt
Asia	6,252,903	5,770,890	+8.4%	10.0%	9.8%	+0.1 pt
Canada (by air)	4,591,876	4,815,830	-4.7%	7.3%	8.2%	-0.9 pt
Grand Total	62,809,722	58,795,531	+6.8%	100.0%	100.0%	0.0 pt

Americans are regaining sanity (but 768 mn days still unused)

AMERICA'S VACATION TREND

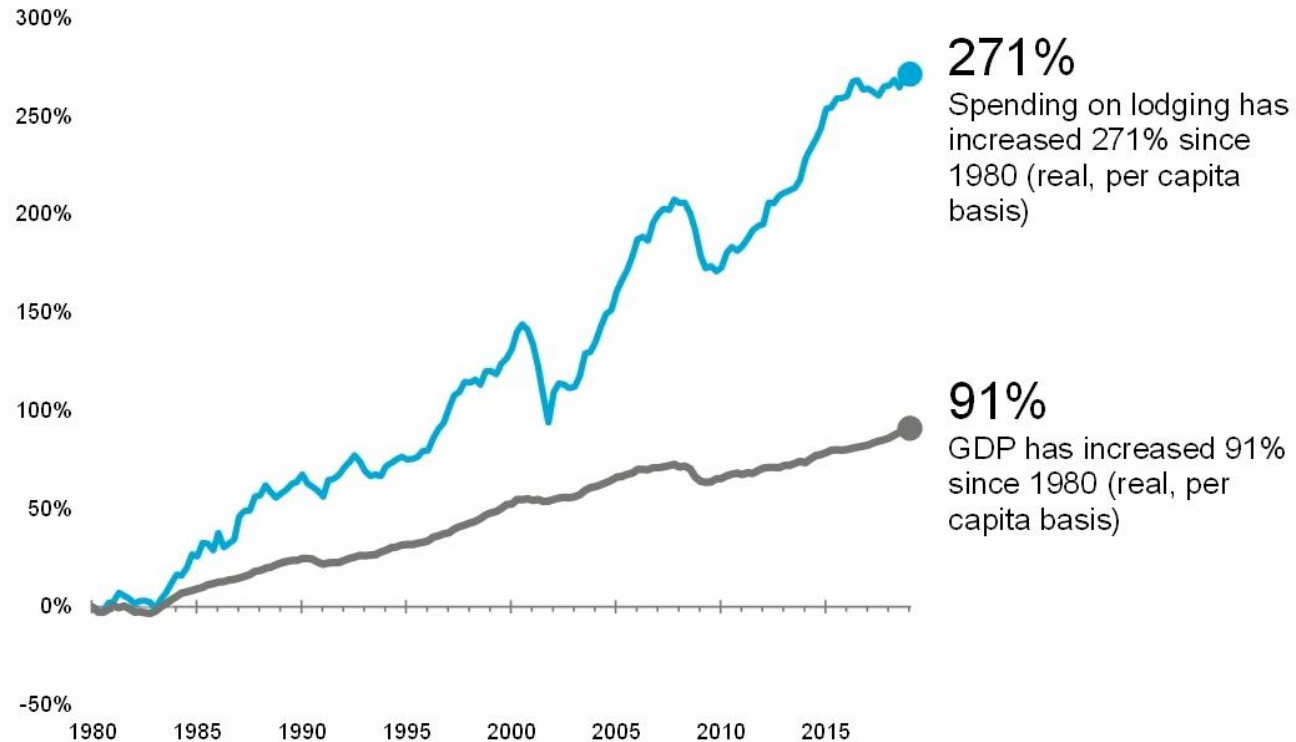


Travel continues to gain American wallet share

Consumer spending on lodging

Real, per capita GDP and spending on lodging

Percentage change since 1980



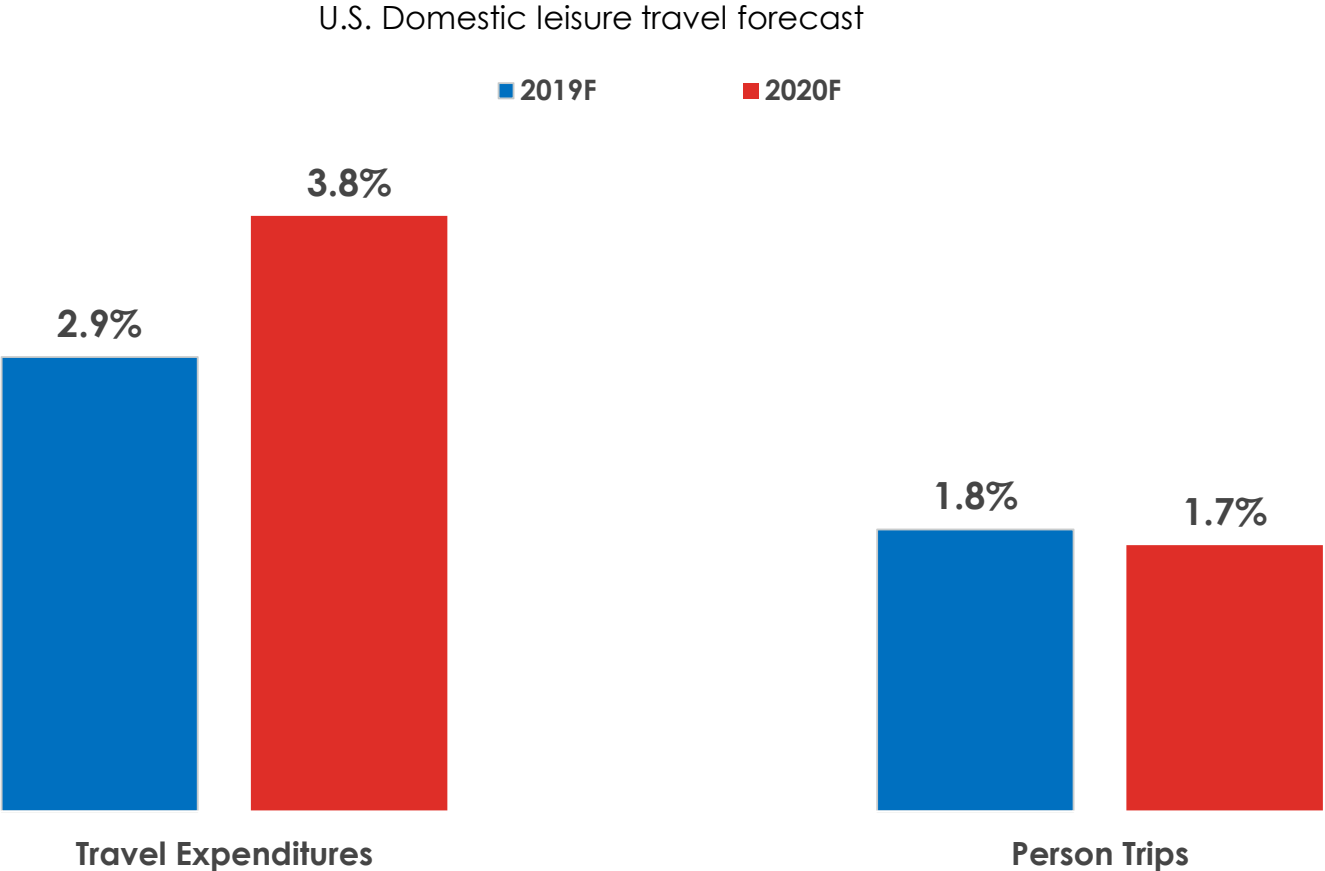
Note: Measures leisure travel spending on lodging by US households. Data through the first quarter of 2019.
Source: Bureau of Economic Analysis; Oxford Economics



TRAVEL TRENDS

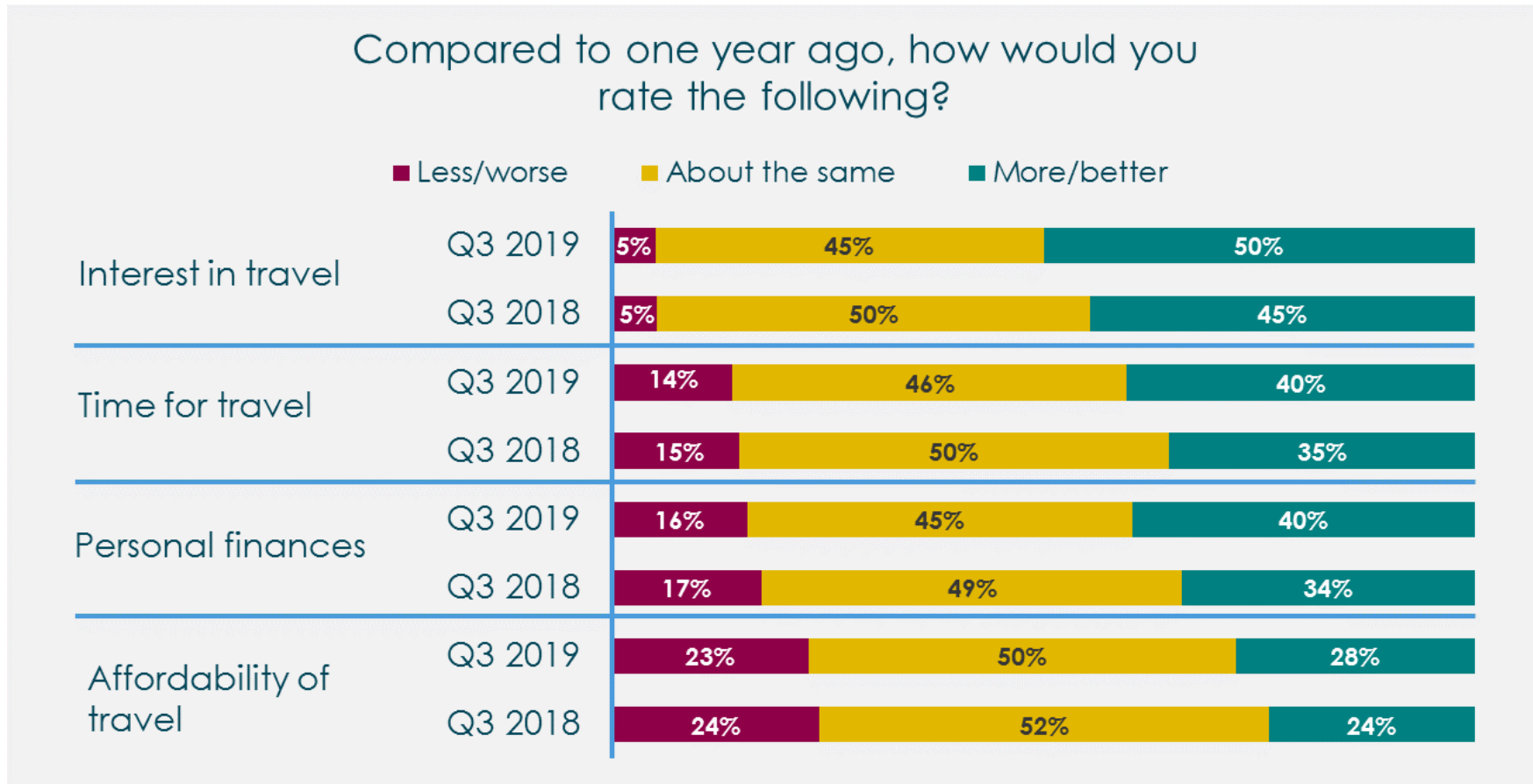
HAWAII TOURISM[™]
UNITED STATES

DOMESTIC TRAVEL SPENDING TO GROW

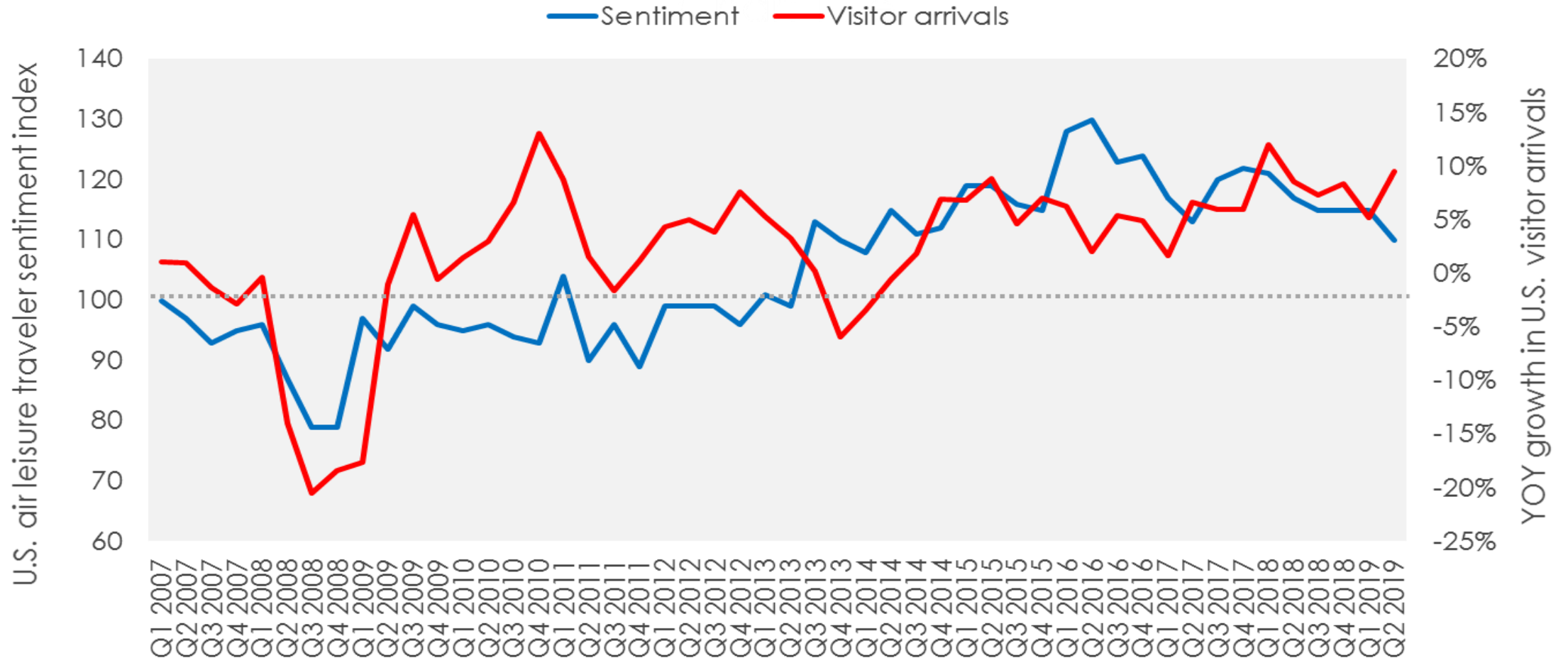


Source: U.S. Travel Association

INTEREST, TIME, PERSONAL FINANCES AND AFFORDABILITY REMAIN POSITIVE



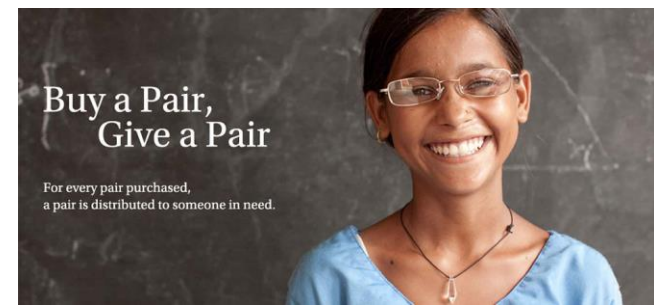
U.S. AIR TRAVELER SENTIMENT TRACKS CLOSELY WITH ARRIVALS



Source: HVCB analysis of MMGY Global travelhorizons Wave III 2019 data and HTA 2007-2019P data

TARGET AUDIENCE

AVID EXPLORER








AVID EXPLORER

INFLUENCE OF SOCIAL MEDIA

Have Selected a Destination Based at Least Partially on Information Viewed on Social Media	Total	Interested in Visiting Hawai'i	Not Interested in Visiting Hawai'i
Yes	67%	70%*	55*

Have Selected a Destination Based at Least Partially on Information Viewed on Social Media	Total	Interested in Visiting Hawai'i	Not Interested in Visiting Hawai'i
Facebook	62%	63%*	55%
Instagram	53	54*	45
YouTube	53	53	51
Pinterest	36	37	30
Twitter	24	24	21
Snapchat	23	23	19

AVID EXPLORER MEDIA CONSUMPTION

Media Channel	Usage	Usage Highlights
 Digital	Heavy	<ul style="list-style-type: none"> • Spends on avg. 29 hours per week online • Digital guides their lives completely and they would feel disconnected without it (125). They use it for entertainment, communication and rely on it to keep them up to date with latest styles and trends (151) • Very active on social media and checks it throughout their day (127)
 Outdoor	Moderate	<ul style="list-style-type: none"> • The Avid Explorer Never Been's notice transit ad placements, such as ads in airports (223) and ads inside taxis (227) when they are out on the go
 In-Cinema	Heavy to Moderate	<ul style="list-style-type: none"> • The Avid Explorer Never Been targets love adventure and are eager to watch films in theaters that reflect that sentiment (147)
 Magazine	Light	<ul style="list-style-type: none"> • They are not heavy magazine readers (85) and only use them when convenient or faced with few other options
 TV	Light	<ul style="list-style-type: none"> • The Avid Explorer Never Been does not usually tune-in to Linear TV live (66), but instead chooses to watch the content on their own time and on their own devices/streaming services (192)

CONSUMER STRATEGY

HTA PILLARS

Community

Hawaiian
Culture

Natural
Resources

Marketing

A woman with long brown hair, wearing a light blue one-piece swimsuit, is swimming underwater. She is viewed from behind, reaching her hands towards the surface of the water. The water is a deep, clear blue, and there are some bubbles and light reflections visible. The overall mood is serene and hopeful.

A look ahead to 2020.



2020 NATIONAL BASELINE CAMPAIGN

EVERGREEN STORYTELLING

Building Island Brands



Advanced TV

hulu

ROKU

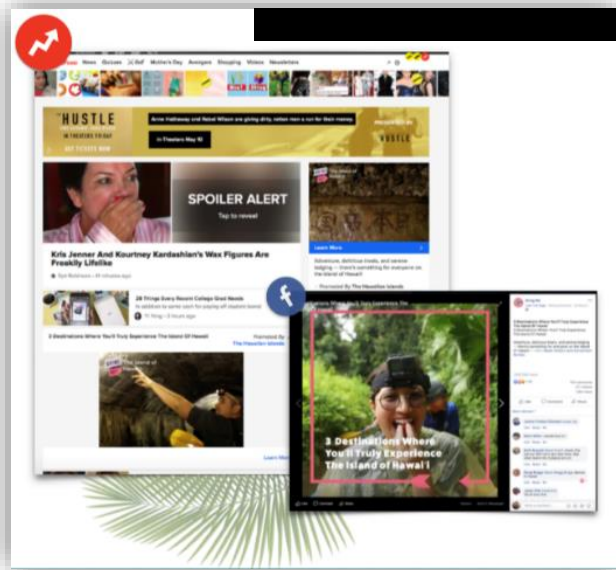


Cinema

SPOTLIGHT
CINEMA NETWORKS



NATIVE CONTENT



BuzzFeed

 feedfeed

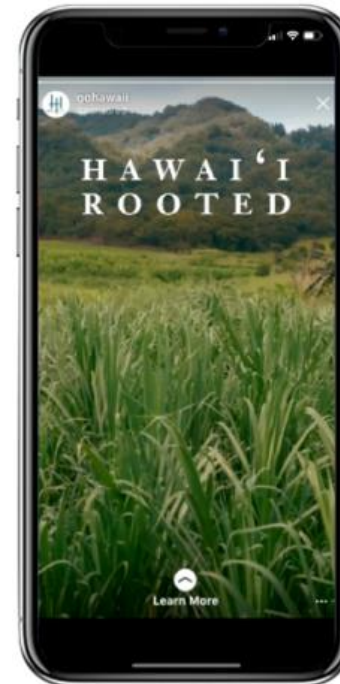
CONDÉ NAST
Traveler


GREAT BIG STORY


culture trip


MATADOR
network

SOCIAL MEDIA



PUBLIC RELATIONS

Continue to deliver cost-effective contemporary storytelling in an editorial context

Coordinate

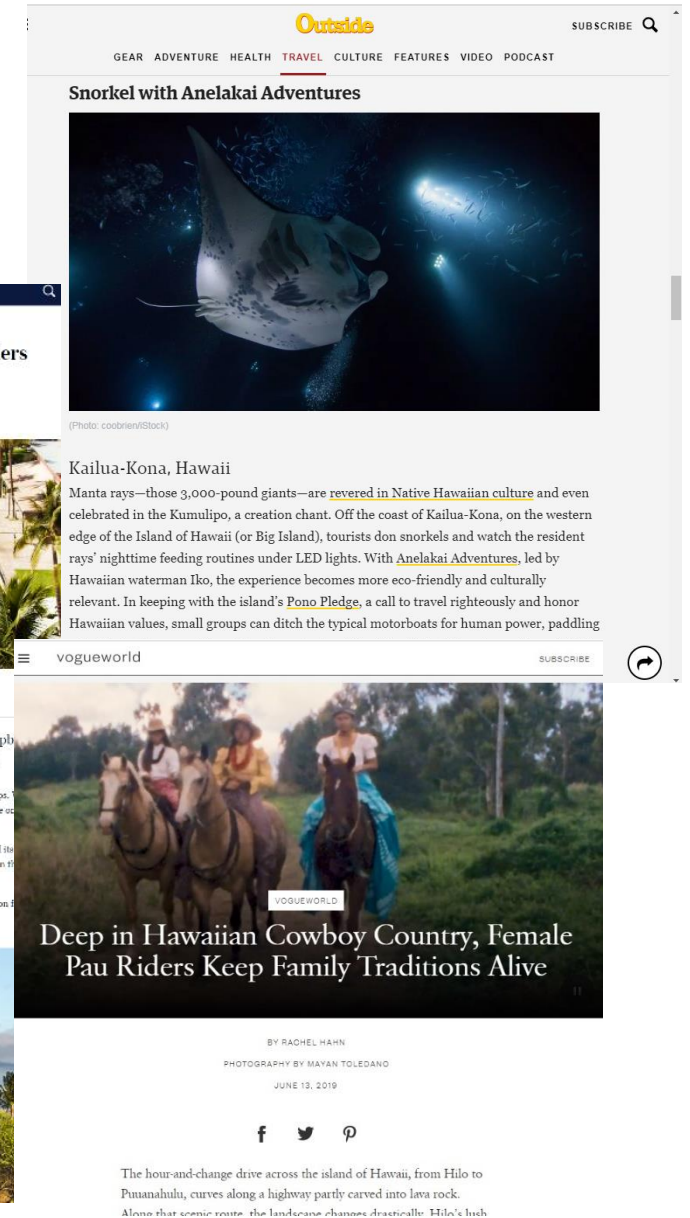
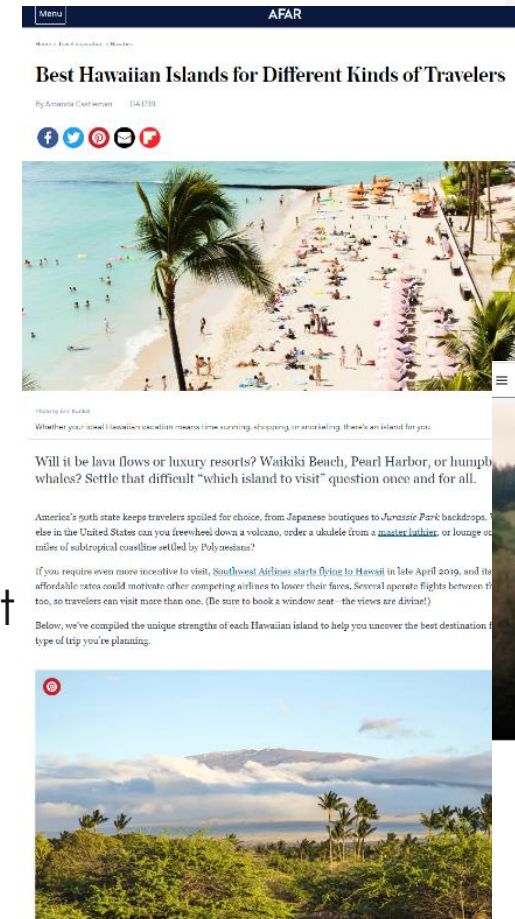
With Statewide, Island Chapters, GMTs, and industry partners

Focus

Key storylines along Cuisine, Culture, Authentic Soft Adventure

Connect

Develop deeper long-term relationships with the evolving landscape of content developers



TRADE STRATEGY



TRAVEL TRADE

Maintain leisure arrivals to Hawai`i, drive high value visitation & extend the Hawaiian Islands Brand

Awareness &
Communication

Education &
Training

Partner
Marketing

TRAVEL TRADE

- Trade communications
- Travel agent portal
- Training programs – live / on-line / webinars
- Sales blitzes
- Industry conferences / tradeshow
- Trade media – communicate branding and drive certifications
- Tactical cooperative marketing

Five Ways to Experience the Real Hawaii Island

Produced by Virtuoso with Hawaii Tourism United States



Discover Hawaii's Heritage

To truly understand Hawaii is to know its stories, from mythical legends to modern tales. Learning about deeply rooted traditions, authentic cultural experiences and more local insights will bring you closer to this destination.

Complete the Official Hawaii Destination Program to gain the knowledge to plan your clients' own authentic moments. This multilayered program also gives you exclusive benefits like valuable consumer referrals, access to specialist-only webinars, and use of the Hawaii Destination Specialist badge. Let us help you become a Hawaii expert to grow your business and your clients will keep coming back for more.

[Learn More >](#)



The sun sets over the northeast Pololu Valley Lookout, one of Hawaii Island's most scenic seaside destinations.

Photo by Larry Marshall





RESPONSIBLE TOURISM



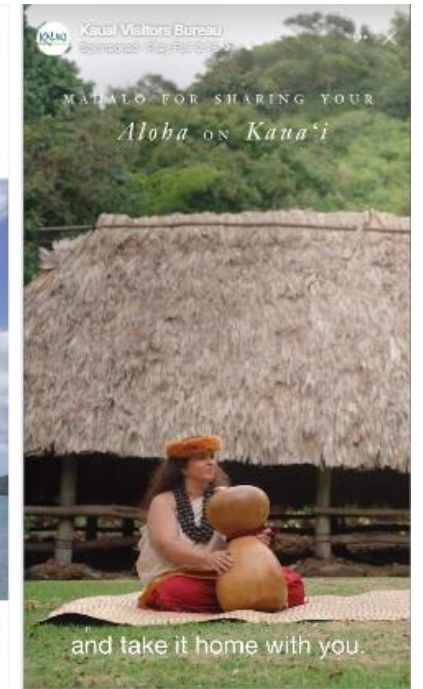
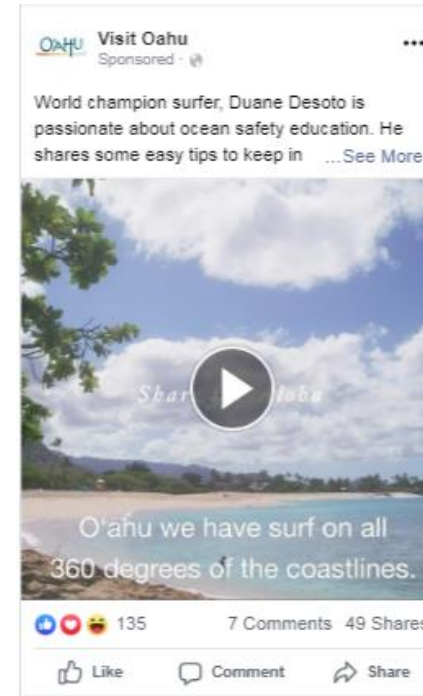


Educating Visitors Through On-Island Kuleana Messaging In Alignment with HTA's pillars

- Marketing
- Hawaiian Culture
- Natural Resources
- Community

Educating Visitors Through On-Island Kuleana Messaging

- A total of 20 videos were created for Maui, O‘ahu, island of Hawai‘i, Kaua‘i and statewide versions
- Select videos were translated and subtitled in Japanese, Korean and Chinese
- Maui videos launched in 2018 and have already generated over a million impressions
- Paid social for all islands started in June 2019 and will run through December; YTD have garnered almost 11mm* impressions
- For Q4, videos will run on in-room channel (Hōkū TV, Real Hawai‘i TV, WHERE TV, Outrigger TV, Spectrum In-room) and Robert’s Hawai‘i Airport Express Shuttle



*Impressions as of 10/29/19



THE HAWAIIAN ISLANDS

BRAND GUIDELINES

Brand Story

- History
- Challenges

Our Brand

- Brand purpose
- Unique positioning
- Things to avoid
- Messaging

Our Island Brands

- Kaua'i
- O'ahu
- Moloka'i
- Lanai
- Maui
- Island of Hawai'i

Our Brand Assets

- Our brand voice
- Core elements
- Logo usage
- Color palette
- Typography
- Photography

Brand Application

- Digital
- TV
- Print

SOCIAL MEDIA COORDINATION



GOHAWAII.COM

ISLANDS EXPERIENCES CULTURE  PLANNING SOCIAL  LANGUAGES ▾ 

