



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

**REGULAR MARKETING STANDING COMMITTEE MEETING
HAWAI'I TOURISM AUTHORITY**

Po 'akolu, 29 Iulai 2020, 1:00 p.m.
Wednesday, July 29, 2020 at 1:00 p.m.

*Kikowaena Hālāwai O Hawai'i
Lumi 314
1801 Alaākea Kalākaua
Honolulu, Hawai'i 96815*

Hawai'i Convention Center
Room 314
1801 Kalākaua Avenue
Honolulu, Hawai'i 96815

'O ka ho'opakele i ke ola o ka lehulehu ka makakoho nui. E maliu ana ka HTA i ke kuhikuhina a nā loea no ke kū kōwā, ka uhi maka, me nā koina pili olakino 'ē a 'e. Koi 'ia ke komo i ka uhi maka a me ke kū kōwā ma nā ke'ena a ma nā hālāwai.

The safety of the public is of the utmost importance. Pursuant to expert guidance, HTA will be following strict physical distancing, facial coverings, and other health-related requirements. Face coverings and physical distancing are required in HTA offices and meetings.

Koi 'ia ka hō'oiā i kou olakino maika'i ma mua o ke komo i ke Kikowaena Hālāwai O Hawai'i ma ka 'īpuka o waena o ka hale ho'okū ka'a. E pāpā 'ia ke komo 'ana o ke kanaka nona ka piwa ma luna a 'e o ka 100.4°F. Inā 'ōma'ima'i 'oe, e 'olu'olu, e 'imi i ke kauka nāna e kōkua iā 'oe.

Entrance to the Hawai'i Convention Center requires a health screening at the center parking garage entrance. Persons with a temperature of over 100.4°F will be denied entry. If you are not feeling well, we urge you to contact a healthcare provider.

Papa Kumumana'o
AGENDA

1. *Ho'omaka A Pule*
Call to Order and Pule
2. *'Āpono I Ka Mo'o 'ōlelo Hālāwai*
Approval of Minutes of the June 24, 2020 HTA Marketing Standing Committee Meeting
3. *Hō'ike No Nā Huaka'i I Pa'a Mua*
Report of the Hawai'i forward looking bookings, Global Agency Pro and YouGov



4. *Hō'ike A Kūkākūkā No Ka Mākaukau O Nā Hui Mokulele*
Presentation and Discussion of Airline Readiness for when Hawai'i opens up to visitors. Hawaiian Airlines Avi Mannis Sr. VP of Marketing will be talking about Hawaiian Airlines strategy and tactics on welcoming the visitors while protecting our local residence with safety protocol procedures
5. *Hō'ike A Kūkākūkā No Ka Mākaukau O Nā Hōkele*
Presentation and Discussion of Hotel Readiness for when Hawai'i opens up to visitors. Mufi Hanneman President / CEO of Hawai'i Lodging & Tourism Association will be discussing some of the challenges the hotels may be going through in the opening process
6. *Hō'ike A Kūkākūkā No Ka Mākaukau O Nā 'Ākena Huaka'i*
Presentation and Discussion of Wholesale / Travel Agent Readiness for when Hawai'i opens up to visitors. Amy Terada / VP of Marketing will be discussing procedures put in place to inform the leisure travelers of Hawai'i's entry requirements discussed at Governor Ige's press conference of June 27. What is going well along with challenges. Amy will also present booking pace for fall, winter and quarter 1 of 2021
7. *Hō'ike A Kūkākūkā No Ka Ho'okumu I 'Aha Kūkā He'enalu A Hoe Wa'a*
Presentation and discussion of establishing a Surfing & Canoe Paddling Advisory Group to the HTA Board of Directors
8. *Nā'ana A Kūkākūkā I Ka Mo'ohelu Makahiki Kālā 2021*
Review and discussions of the approved FY 2021 budget reflecting the changes approved in June by the full Board to address the TAT allocation shortfall
9. *Hō'ike No Ko HVCB Papahana Ho'omōhala Hou*
Update Relating to HVCB's Recovery Plan and What Has Been Implemented. Jay Tawar / Sr. VP & CMO will discuss why they need additional funds for messaging Hawai'i's entry requirements and to ramp up tourism with safety protocol in mind for our local residence
10. *Hō'ike No Ko HTJ Papahana Ho'omōhala Hou*
Update Relating to HTJ's Recovery Plan and What Has Been Implemented. Eric Takahata/ Managing Director of HTJ will discuss why they need additional funds to ramp up tourism for Hawai'i from Japan
11. *Hō'ike No Koa HTO Papahana Ho'omōhala Hou A Papahana Hokona*
Presentation of Oceania GMT on the Recovery for 2020 and Brand Marketing Plan for 2021. Presenter are Giselle Radulovic / Hawaii Tourism Oceania (HTO) Australia Country Manager, Darragh Walshe / HTO – New Zealand Country Manager will be presenting current events for Australia and New Zealand along with how to recover tourism into Hawaii



12. *Hō'ike No Ko HTCAN Papahana Ho'omōhala Hou A Papahana Hokona*
Presentation of Canada GMT on the Recovery for 2020 and Brand Marketing Plan for 2021. Susan Webb / Hawaii Tourism Canada (HTCAN) - President will be presenting what is happening in market followed by the recovery plan for travel to Hawaii
13. *Hō'ike No Ko HTK Papahana Ho'omōhala Hou A Papahana Hokona*
Presentation of S. Korea GMT on the Recovery Plan for 2020 and Brand Marketing Plan for 2021. Irene Lee / Hawaii Tourism Korea (HTK) Korea Country Director
14. 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 attend the public meeting and provide written testimony on any agenda item. Written testimony may be submitted prior to the meeting to the HTA by email to ariana.kwan@gohta.net; Any person requiring an auxiliary aid/service or other accommodation due to a disability, please contact Ariana Kwan (973-2254 or ariana.kwan@gohta.net) no later than 3 days prior to the meeting so arrangements can be made.

Agenda Item #2:

Approval of Minutes of the
June 24th, 2020
HTA Marketing Standing
Committee Meeting



Hawai'i Convention Center
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David Y. Ige
Governor

Chris Tatum
President and Chief Executive Officer

YET TO BE APPROVED

**MARKETING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY
Wednesday, June 24, 2020
Hawai'i Convention Center
1801 Kalākaua Avenue, Honolulu, Hawai'i 96815**

MINUTES OF MARKETING STANDING COMMITTEE MEETING

COMMITTEE MEMBERS PRESENT:	Kelly Sanders (Chair), Fred Atkins, George Kam, Kyoko Kimura, and Benjamin Rafter
COMMITTEE MEMBERS NOT PRESENT:	Sherry Menor-McNamara
HTA BOARD MEMBERS PRESENT:	Richard Fried
HTA STAFF PRESENT:	Chris Tatum, Keith Regan, Pattie Herman, Marc Togashi, Kalani Ka'anā'anā, Caroline Anderson, Jennifer Chun, and Ariana Kwan
GUESTS:	Representative Richard Onishi, Jay Talwar, John Monahan, and Eric Takahata
LEGAL COUNSEL:	Gregg Kinkley

1. Call to Order:

Marketing Standing Committee Chair Kelly Sanders called the meeting to order at 1:01 PM.

2. Approval of Minutes of the May 27, 2020 HTA Marketing Standing Committee Meeting:

Chair Sanders noted that the May 27, 2020, HTA Marketing Standing Committee meeting minutes required one correction, where Pattie Herman, HTA Vice President of Marketing and Product Development, was incorrectly referred to as the "Director of Marketing and Product Development." Chair Sanders then requested a motion to approve the meeting minutes. George Kam made a motion, which was seconded by Fred Atkins. The motion was unanimously approved.

3. Presentation of Recovery Plan, Digital, Travel Trade, Consumer Direct:

Chair Sanders recognized Ms. Herman to lead the presentation of the recovery plan for digital, travel trade, and consumer direct marketing. Ms. Herman recognized Jay Talwar, HVCB Senior Vice President and Chief Marketing Officer, to present on the safe destination

and recovery plan marketing strategies for the mainland U.S. Mr. Talwar established that many people are not ready to travel anytime in the near future. He said there will be a slow start to the recovery with over 40% of American travelers saying their next trip will not occur until 2021. Mr. Talwar noted that it will be more difficult to get residents to welcome visitors back with aloha than to get the visitors onto planes. He added that the messaging strategy will revolve around what residents think are important. Mr. Talwar explained that residents care about the health and safety of the community for themselves and their families and perpetuating the cultural and environmental sustainability of Hawai'i. He noted that residents are enjoying the smaller crowds and the recreational opportunities provided by the smaller crowds. Mr. Talwar said the marketing campaigns will focus on welcoming respectful visitors, delivering messages of community values, and what appropriate visitor behavior looks like. Mr. Talwar discussed the various times that the messaging can reach individual travelers from planning, pre-flight, arrival, and throughout their time in Hawai'i. He said the plan is to continue the "Rooted" campaign, in which local ambassadors who are immersed in Hawaiian culture and in the modern world deliver messages to visitors about Hawai'i's cultural values and have conversations about appropriate behavior. Mr. Talwar noted that the tactical goal is to be efficient and use as much existing creative assets as possible across digital and social platforms. He added that the content will visually communicate the purity of the environment, the clean air, and the clean water. Mr. Talwar said another aspect of their pre-arrival messaging is to emphasize Hawai'i's beautiful resort areas and amazing experiences and activities, coupled with how to be respectful of Hawai'i's cultural values in the community. He then said in-destination messaging will focus on the health and safety of the traveler and the community and respectful ways to interact with the environment and the community.

Mr. Talwar said the title of the "Rooted" campaign will be updated to "It's Time," which will focus on three pillars. The first is to understand that the target audience needs to rejuvenate in Hawai'i's natural environment and enjoy the fresh air, clean waters, beautiful vistas, and the spirit of aloha. He added that these types of images will really connect with visitors. Mr. Talwar said the second pillar is that visitors need to be sensitive to the cultural values of Hawai'i, and those values will be shared with them because their behavior cannot be expected to change if those values are not shared with them. Visitors will have meaningful experiences when they respectfully connect with the community. He said the third pillar will focus on health and safety, which will include practice tips to keep visitors and the community safe from COVID-19. Mr. Talwar noted that the video samples he will play at the committee meeting are storyboards that will be expanded, but captures the essence of the messaging to be delivered during the campaign. He said the first sample video is an extension of the "Kuleana" campaign. Mr. Talwar then played a video sample that encourages visitors to comply with safety precautions to protect fellow visitors and residents so that Hawai'i can remain open to visitors. He noted that this video would be running at the airports, on the airplane before visitors arrive, and on social media. Mr. Talwar then played a second video sample that portrays Hawai'i's cultural and natural resources with the hope that it attracts visitors to the type of activities that support perpetuating Hawai'i's natural resources and culture. He added that another goal of the

campaign is for residents to see visitors more engaged in supporting the local community. Mr. Talwar then played a third video sample that promotes Hawai'i resorts, activities, and amenities.

Mr. Talwar then discussed the media delivery plan. The campaign would be rolled out in August and September and target a 25 to 54-year-old age demographic, who are repeat visitors and respectful travelers. He said there is a \$2.1 million option and a \$4.6 million option. Mr. Talwar noted that the campaign would focus on U.S. West Coast markets in Los Angeles, San Francisco, Seattle, Portland, Sacramento, and San Diego. He noted that distribution will focus in areas where most people now consume media with media streaming, digital and social media, out-of-home advertisements like billboards, and selective TV and radio.

Mr. Talwar then discussed the paid media strategy, which is to work with media partners that are the right editorial environment for HTA's messaging. He said that once the 14-day quarantine order is lifted, HVCB wants to push that message and carry that momentum moving forward. Mr. Talwar thought that media costs would be down across the board. However, he noted that one of the challenges is that, with the exception of newspaper, there is an increase in demand and an increase in media costs because of Olympic sponsorship money in the market and the presidential election. Mr. Talwar said, with the new digital media landscape, HVCB needs to leverage paid media into earned media as much as possible.

Mr. Talwar then discussed the two pricing options. He said the first price option continues to use over-the-top advertising (OTT) in the top feeder markets. He noted that HVCB pulled together a list of potential media partners that make sense based on past analysis across mobile devices, tablets, desktop, and other platforms. Mr. Talwar said HVCB wants its advertising content to be where people are consuming media content. He explained that about 40% would be invested in social media and about 56% would be invested in OTT, display, and video. Mr. Talwar noted that with the second pricing option, the budget breakdown does not change dramatically. However, the second price option includes digital out-of-home advertising, specifically in the Los Angeles market, which has opportunities in high profile and high traffic areas. He explained that the first price option is projected to achieve about 20% coverage of the target audience in the top 4 markets: Los Angeles, San Francisco, Seattle, and Portland. He added that the second price option is projected to achieve about 40% coverage of the target audience in those same markets.

Mr. Atkins asked how the message showing that the visitor industry cares about the community gets into the average household. Mr. Talwar responded that they will have editorial partners on each island, and the "Kuleana" campaign will be on all social platforms.

Chair Sanders asked how the message about pre-testing will be communicated to travelers before they get on the plane. Mr. Talwar responded that is a separate program, which includes a communication aspect. He added that there are questions about whether there will there be funding for communications within that program and if so at what level. He

said industry partners, especially in the sales side, will need to push those communications. Chris Tatum, HTA President and CEO, added that Hawai'i continues to learn from best practices elsewhere. He explained that Alaska has a similar pre-test program and implemented it quickly after they announced it, so a lot of people arrived without having taken a pre-test. Mr. Tatum said if they have four or five weeks from the announcement of the program to implementation, HTA can do a phenomenal job working with its industry partners to get the message out. John Monahan, President and CEO of HVCB, said they want people to come back to Hawai'i as soon as possible by all means available.

Chair Sanders asked Mr. Talwar what he would do with the marketing campaign if he had additional funding. Mr. Talwar responded that the funding is very light compared to advertising similar products in those markets for two months.

Benjamin Rafter asked why the age range for the target audience is being expanded. Mr. Talwar responded that before March, the visitor industry was booming, and the industry was providing visitors from U.S. market with over 90% satisfaction and 73% of travelers were repeat visitors. He added that, previously, the target age range was in a younger demographic because the focus was to shape the Hawai'i brand and image for the next generation. Mr. Talwar explained that the visitor counts are low, and as Hawai'i transitions into reopening, the question becomes how to restart the tourism machine. He noted that having repeat travelers is critical and that some repeat travelers are just as passionate about Hawai'i as residents. Mr. Talwar said those visitors do not have a limited age range.

HTA Board Chair Richard Fried asked whether there has been any discussion as to arriving visitors paying a fee for a COVID-19 test. Mr. Monahan responded that he has not been involved in any of the recent discussions. Mr. Tatum replied that HTA has provided data to the recovery task force and that about 50-60% of visitors said they would pay a fee. He asked Representative Richard Onishi whether there have been more recent discussions regarding testing for arriving visitors and funding. Rep. Onishi said it has not been finalized, but there are different scenarios being discussed, which include possibly charging fees.

Ms. Herman recognized Eric Takahata, Managing Director of Hawai'i Tourism Japan (HTJ), to present on the recovery plan for Japan. Mr. Takahata said initially the travel trade will be very poor when the market reopens, but HTJ will look toward working more closely with the travel trade, mainly online travel agencies. The agencies will help with a number of things while the Japanese traveler is in Hawai'i including contact tracing. Mr. Takahata said HTJ's approach will be closely integrated with the travel trade. He noted that from a public health standpoint, the infection rate in Japan is very low, but all tours and flights are canceled through the end of July. Mr. Takahata added that the desire to travel to Hawai'i remains relatively strong. He said HTJ conducted a survey that received about 11,700 responses. Mr. Takahata explained that the results of the survey show that in the heavy repeater market, 30% of that market would visit Hawai'i within six months and 40% would visit within a year. He noted that the more times a Japanese traveler has visited Hawai'i, the more quickly that traveler would be willing to return. Mr. Takahata then discussed the three phase recovery

plan. He said the target audience is what HTJ refers to as pono travelers that are generally highly respectful of the culture and history of Hawai'i, repeat travelers, and the "new normal workers," which are people who have not been affected by the pandemic and have continued to receive their normal income and benefits. He explained that April through July has been considered Phase 1 of the recovery plan, which has involved engagement with the Japanese consumer through digital means. Mr. Takahata said that the primary digital platform has been "Hawai'i at Home." As HTJ moves to Phase 2 and Phase 3, the travel trade will become important because they will assist with messaging Japanese travelers, with contact tracing, and with sharing how to be a pono traveler. Mr. Takahata said, for Phase 1, the "Hawai'i at Home" platform has fun, interactive activities that the Japanese consumer can do with their families or as a couple. He noted that the downloadable Hawai'i-themed coloring book was very popular. He added that HTJ partnered with a number of Japanese publishers so that people can download travel content about Hawai'i from those publishers via the platform. Mr. Takahata said they partnered with Amazon to make movies that were filmed in Hawai'i available on the platform. He then discussed other media engagement with Japanese consumers, which was all virtual. For example "Music Hawai'i" aired performances by Hawai'i entertainers.

Mr. Takahata discussed the marketing and recovery plan for Phase 2. He noted that one of the things they are working on is a safety protocol video. He then discussed the marketing and recovery plan for Phase 3 in the fall, which is when Hawai'i will hopefully be welcoming visitors back. He said one of the focuses will be the "Hawai'i Expo." Last year, about 12,000-15,000 people attended the event at the Hawai'i Convention Center (HCC). Mr. Takahata noted that this year's event is online, and HTJ is currently working on the platform.

Mr. Takahata then discussed travel trade initiatives. During Phase 1, HTJ has remained engaged with the travel trade industry through Zoom conference calls. He said, during the Phase 2 ramp up, HTJ will ask its industry partners to join in helping to educate the Japanese consumer about how to be a pono traveler. Mr. Takahata then discussed Phase 3 initiatives, which will continue to promote the pono traveler and to host online seminars with travel trade partners. He said if there is additional funding available, HTJ would amplify the current media strategy and provide incentives for booking group travel. Mr. Takahata noted that the hope is to come out of the pandemic with a new type of pono traveler in line with HTA's four pillars and 5-Year Strategic Plan by communicating, educating, and collaborating with the visitor industry. For example, he said HTJ will continue to work with NOAA, the University of Hawai'i, the Department of Land and Natural Resources, and other local non-profits to support Hawaiian cultural programs.

Chair Fried asked whether there has been discussion regarding a travel agreement between Hawai'i and Japan, and whether someone can easily get a COVID-19 test in Japan. Mr. Takahata responded that HTJ is engaged with the Japanese government asking them to explore a travel agreement between Hawai'i and Japan. He said Japanese people cannot readily get a COVID-19 test, but Japan is trying to ramp up its test-taking abilities. He shared that two urgent care facilities in Waikiki that cater to Japanese visitors have the capability to

test about 150 people per day. Mr. Takahata added that they are working with their travel trade partners on developing protocols regarding what would happen if a Japanese visitor is unable to get a test.

Mr. Atkins asked what the duration of the program is for the \$2 million budget. Mr. Takahata responded that HTJ will be able to carry out the presented recovery plan with the \$3.5 million remaining in their budget. He added that if there were an additional \$2 million in funding, HTJ would be able to continue the program through March 2021, and amplify HTJ's efforts in the recovery plan. Mr. Atkins asked for clarification as to whether Japan is not open for international travel until the end of July. Mr. Takahata responded that no packages or flights are booked through the end of July. He noted that an acquaintance he spoke to was able to book a flight on ANA from Japan to Hawai'i in the second week of August. Mr. Tatum asked Mr. Takahata about the current status of U.S. travel to Japan. Mr. Takahata responded that American citizens cannot travel to Japan. Mr. Atkins asked whether from a practical standpoint airlines would be willing to fly Japanese passengers here and not be able to take them back. Mr. Takahata responded that the airlines would be able to bring Japanese travelers to Hawai'i and then back to Japan, just American citizens cannot travel to Japan. Mr. Tatum asked what happens if a Japanese traveler comes here and then goes back to Japan. Mr. Takahata responded that they would need to self-quarantine. Mr. Atkins asked whether pre-pandemic there was a drop off in Japanese summer travel to Hawai'i because of the Olympics. Mr. Takahata responded in the affirmative, but that it was a minor drop off. Kyoko Kimura noted that when travelers return to Japan and are in self-quarantine, they cannot use public transportation. Mr. Tatum said that even though both Japan and Hawai'i have very low numbers, Hawai'i is still a part of the U.S. so any travel agreement between Japan and Hawai'i would have to be arranged with the U.S. State Department, which would be a complicated process. He noted that New Zealand and Australia have a travel agreement. Mr. Tatum added that he believes if Hawai'i continues to have low numbers, there may be an opportunity to negotiate a travel agreement with Japan. Mr. Kam said Governor David Ige's office has had great discussions with Japan and Korea, and travelers want to come as soon as possible, but Australia and New Zealand may still be awhile. He added that the goal is to ensure that they can open up safely to domestic travel first. Mr. Kam noted that Japan is respectful of Hawai'i and would want to pre-test. He shared that Bruce Anderson, Director of the Department of Health (DOH), feels that it would be safe for Japanese tourists to visit because of Japan's low infection rate. Mr. Kam expressed the belief that there is a good chance a travel agreement can be arranged because of the long-standing history between Hawai'i and Japan, and the economic reliance on each other. He said there needs to be sufficient funding to support marketing as the key, international markets open.

4. Approval of the 2021 Branding Budget Followed by Approval of the Marketing Tourism Plan:

Chair Sanders said the FY 2020 budget is 44% lower than the FY 2019 budget so tough decisions have been made. Mr. Tatum noted that Gov. Ige is supportive of releasing the \$5

million in emergency funds to HTA. However, he added that the allocated TAT funding to HTA was reduced by another \$6.5 million. Mr. Tatum explained that the Department of Taxation said the previous information provided by the Administration to HTA was incorrect by a month. Keith Regan, HTA Chief Administrative Officer, noted that TAT funding is allocated to HTA in monthly increments. Mr. Tatum said the budget presented to the Board at the May 28, 2020 Board meeting did not include the \$5 million in emergency funds. However, assuming the emergency funds are approved and allocated to the budget, the budget needs to be reduced by a net \$1.5 million, given the \$6.5 million reduction. Mr. Atkins said HTA submitted a reimbursement request for CARES funds for monies spent by HTA to support COVID-19 mitigation efforts and then asked whether that \$3.3 million, if reimbursed, would go back into the FY 2020 budget. Mr. Tatum responded in the affirmative. Mr. Atkins asked when HTA might expect to receive that reimbursement. Mr. Regan responded that HTA submitted its memo to Mike McCartney, Director of the Department of Business, Economic Development and Tourism, and it was approved by his office. Mr. Regan added that it is now with Gov. Ige's office and hopefully will be approved. Mr. Atkins asked whether HTA's submittals meet all the criteria for CARES funding, to which Mr. Regan responded in the affirmative. Mr. Kam noted that there is a high demand for CARES funding and not to depend on it until the cash is in hand. He added that all CARES funding needs to be spent by the end of the year.

Mr. Kam asked whether Mr. Tatum has any insight about the smoothest transition to the next CEO, in terms of the budget. Mr. Tatum responded with two points. First, he advised not to go off the path of the 5-Year Strategic Plan because any other direction would not have the support of other stakeholders in the community. Second, he recommended engaging more people from the community or the industry in the thought process. Mr. Tatum added that this is the budget HTA has now, but does not necessarily mean this is all HTA will have by the end of the fiscal year. He said hopefully TAT will resume and there will be more funding moving forward. Mr. Tatum discussed that getting residents and the community engaged and getting the message across about the direction of the 5-Year Strategic Plan and about the safety protocols in place are the most important things to accomplish over the next six months. He noted that Hawai'i is well-positioned because people want to come to Hawai'i. Mr. Kam agreed with Mr. Tatum that the 5-Year Strategic Plan will be the guiding principles and was approved by the Board. Mr. Kam asked about engaging Canada as a key market. Mr. Tatum responded that the branding budget had to eliminate smaller markets for the short term, but he advised not discarding those markets in the long term. He noted that Canada is important, but much of the branding that HTA does in the mainland U.S. has an impact on Canada. Mr. Tatum said if visitors do not start returning from the mainland U.S. and Japan, there would be no point. He added that he is hesitant to completely eliminate the smaller markets like Oceania because they will be important markets in the long-term. Mr. Tatum noted that the same campaign messages for the mainland U.S. and Japan can be used to re-engage with the smaller markets at a later time. He said, for now, the money needs to be in the highest valued markets.

Mr. Kam asked Mr. Talwar and Mr. Takahata how much funding they would need to

conduct their respective marketing campaigns properly. Mr. Talwar responded that an incremental amount of \$2.5 million would be a responsible amount with a little bit of cushion for unexpected expenses based on how travel behavior evolves because of COVID-19. Mr. Takahata responded that an additional \$2 million would be appropriate. Mr. Monahan said the U.S. budget includes MCI, which has been flattened because there is no group business right now. He noted that there are a lot of unknowns given the effect social distancing may have on HCC and the hotels hosting meetings. Mr. Monahan recommended that the MCI division needs to be positioned with funding for when that business comes back. Mr. Atkins asked whether MCI has any funding. Mr. Monahan responded that MCI has about \$7 million. Mr. Tatum asked whether there are any groups booking. Mr. Monahan responded that there are some group bookings in 2021, and the city-wide groups that had canceled this year have expressed interest in re-booking at a later time. Teri Orton, General Manager of HCC, added that at least half of the canceled groups have moved to alternate dates, and two groups later in the year have not canceled and are waiting to see how the situation develops. Mr. Monahan suggested that any increases in budget should happen incrementally so as not to waste funds in a tight budget, but to still have enough funding to accomplish their goals. Ms. Orton added that HCC books events five or ten years out, and HCC is receiving inquiries for space. She said HCC needs sales staff to represent it in the market as business starts to roll back. Chair Sanders said feedback is needed as to how these types of large events will evolve in the future. He added that Hawai'i may benefit from major, national meetings being reduced to smaller, more localized regional meetings.

Mr. Atkins noted that the budgets for HVCB and HTJ are for the calendar year, as opposed to HTA's fiscal year budget that begins on July 1st. He asked whether HVCB and HTJ have funding through the remainder of the calendar year and whether their presentations represented requests for additional funding for the remainder of the calendar year. Mr. Monahan responded in the affirmative. Mr. Kam asked Marc Togashi, HTA Vice President of Finance, to clarify. Mr. Togashi said the proposed FY 2020 budget that runs from July 1, 2020, through June 30, 2021, would fund HTA's marketing contractors for the 2021 calendar year. He added that their budget for the 2020 calendar year has been funded by the FY 2019 budget that closes on June 30th. Mr. Atkins asked again whether HVCB and HTJ have enough money for the remainder of the 2020 calendar year. Mr. Monahan responded that they have about \$3.8 million in funding that they have already put into the recovery campaign, but Mr. Talwar is requesting a \$2.5 million supplement. Mr. Talwar confirmed that HVCB was funded for the 2020 calendar year by the HTA FY 2019 budget and that he is requesting an incremental amount of \$2.5 million from HTA's FY 2020 budget for the recovery campaign.

Mr. Rafter asked whether there is flexibility to reallocate funding from the FY 2019 budget. Mr. Regan responded that the FY 2019 ends on June 30th, and Mr. Togashi added that any savings from the FY 2019 budget is already reflected in and built into the FY 2020 budget. Mr. Rafter asked why the budgets for HVCB and HTJ run on a calendar year when HTA operates on its own fiscal year because if Hawai'i and Japan had a travel arrangement, HTJ would be completely over budget, but if Japan remains shut down for the rest of the year, a

supplemental \$5 million for HTJ from the HTA FY 2020 budget would be an unwise expenditure. Mr. Regan responded that is how the contracts with HVCB and HTJ are structured. Mr. Kam added that, when travel from the mainland U.S. or Japan reopens, HTA needs to be well-positioned from a marketing standpoint to take advantage of opportunities as they present themselves. Mr. Tatum said the branding budget is fluid in that funding can be reallocated to respond to changes in the various markets. He noted that the challenge is looking at the other segments of HTA's budget and seeing if money may be moved from those other areas.

Mr. Atkins asked, when the Board approves this budget, whether funding can be allocated to supplement HVCB and HTJ for the recovery campaigns. Mr. Togashi said the Board could do that with the hope TAT allocations resume, and Mr. Tatum added that the Board can take a risk and front-load the funding. Mr. Kam noted that ensuring tourism comes out of the gates strong is where HTA funding should be invested. He expressed his inclination to front-load HTA funding with the hope that HTA may receive more funding on the back end of the fiscal year. Mr. Tatum asked Rep. Onishi if he believes HTA will receive more TAT funding. Rep. Onishi responded that his personal recommendation is to first address the \$1.5 million shortfall because it is likely Gov. Ige will release the \$5 million in emergency funds. He added that the Board has the ability to adjust the budget at any time during the fiscal year. Rep. Onishi said, moving forward, the Board can monitor the situation and shift funds to focus advertising into specific markets. He noted that approving expenditures upfront may result in bringing in more visitors and more revenue such that Gov. Ige would resume making TAT allocations.

Ms. Herman said that Gov. Ige just announced that as of August 1, 2020, Hawai'i will implement a pre-travel testing option as an alternative to the 14-day quarantine.

Chair Sanders announced a break in the meeting at 2:49 PM. The meeting resumed at 3:01 PM.

Ms. Herman discussed the Tourism Marketing Plan (TMP) as contained in the Marketing Standing Committee packet. She noted that the four pillars will remain constant in everything HTA does. Ms. Herman added that the 5-Year Strategic Plan is the strategic vision, while the TMP is a tactical action plan. She highlighted the TMP objectives, which include incorporating the four pillars, aligning a global brand of authenticity, uniqueness, and responsible tourism amongst HTA's marketing contractors, and maintaining the strength of Hawai'i's brand in comparison with its competitors as a safe destination. She noted that HTA will have marketing contracts for the U.S., Canada, Japan, Korea, and Oceania markets for the coming fiscal year. Ms. Herman said the TMP contains the contract periods for each contractor, as well as visitor expenditure statistics. She added that implementation remains the same and any expenditure in excess of \$250,000 requires committee approval.

Mr. Atkins noted that two contracts will lapse at the end of the year and asked whether RFPs would be issued. Ms. Herman responded that they are in the process of issuing RFPs.

Chair Sanders said it is a part of Hawai'i's future success to ensure that too long of a period does not pass without selling to groups. Mr. Tatum responded that John Reyes, HVCB Senior Vice President and Chief MCI Sales Officer, and a number of other sales staff are still with HVCB. Mr. Monahan added that HVCB is positioned to build back the sales staff and many people are available for hiring. He said HVCB has people working now, just not as many. Mr. Monahan noted that Mr. Reyes and the single property people, who have been retained, have some HCC experience, which provides the ability to cover a vastly reduced waterfront and be positioned to add people back when the waterfront becomes larger. Mr. Atkins said conventions book ten years out, and he is concerned about there being gaps due to a lack of sales coverage. Mr. Monahan responded that there has been no activity, and Mr. Reyes and his staff are in place to monitor the situation. He added that he will report to HTA if HVCB cannot handle any increase in activity. Mr. Tatum said it needs to be evaluated what conventions can be held at HCC with social distancing measures. He noted that, previously, HCC could accommodate 4,000 people, but that number may drop as low as 1,500 people. Mr. Monahan said some groups have told him HCC does not have enough space for their conventions and have looked into utilizing additional hotel space to accommodate their needs. He added that MCI is positioned to come out of the gates strong and bring back staff on a proportional basis in areas where there is an increase in activity should there be new funding. Mr. Atkins said HCC is not included in the budget being discussed. Mr. Tatum responded that HCC TAT allocations stopped when HTA allocations stopped. He noted that they have continued to invest in HCC with the new cooling tower and trellis. He added that Ms. Orton did a good job in contingency planning and putting money aside.

5. Review of the Island Chapters Kama'āina Campaign and the Logistics of its Web Bank Information:

Ms. Herman recognized Mr. Monahan to discuss the "Kama'āina" campaign. Mr. Monahan said that, in the past, every island except O'ahu ran a "Kama'āina" campaign for the summer. He noted that, this year, there was not much interest. Hawai'i Island did not run one, Maui ran one out of their Economic Development office, and only Kaua'i ran their regular one. Mr. Monahan said HVCB repurposed the website into a kama'āina special offers page. He explained that any business can access the page and advertise their special offer. He noted that there are 150 participants, the program was advertised via newspaper articles and TV coverage, and the program runs through August 31st. Mr. Monahan said most of the hotels that are open participated, though not many restaurants participated. He noted that they do not have any numbers yet because it is too early. He added that many businesses were not going to invest the money to re-open unless they knew they were going to get the bulk of the visitors back, but the program is up and running with room to grow.

6. Presentation of the 2021 Local Community, Hawaiian Culture, and Natural Resources:

Ms. Herman recognized Caroline Anderson, HTA Director of Community Enrichment. Ms. Anderson said that, since the last Board meeting, she has presented the Destination

Management Recovery Action Plan to each county's Office of Economic Development, to the mayors of Kauai and Hawai'i Island, and to Mr. Monahan and the HVCB Island Chapters. She expressed confidence that those who have been briefed are in support of the plan. Ms. Anderson summarized the goals of the program as contained in the Marketing Standing Committee packet. She explained that HTA will oversee the program in partnership with each county's Office of Economic Development and HVCB Island Chapters. Each county program will be guided by steering committees made up of fifteen to twenty members, with representatives from the visitor industry, agriculture industry, chambers of commerce, and other sectors, and will receive input from the broader community. Ms. Anderson said the foundation of the action plans will be based on the 5-Year Strategic Plan and the four pillars. She then discussed the anticipated timeline. The steering committees will meet in August, followed by virtual public meetings in September. The action plans will be posted online in September and October for more community input. The steering committees will approve the action plans in October or November, with implementation in December or January.

Ms. Anderson said the proposed budget is \$925,000 allocated to each county. She noted that Kaua'i and Hawai'i Island would not receive funding for developing an action plan because they already have current tourism recovery plans, while Maui and O'ahu do not. Ms. Anderson then discussed HTA's internal timeline for implementation of the action plans by December as contained in the Marketing Standing Committee packet.

Mr. Kam asked whether the City and County of Honolulu can fund development of the O'ahu action plan with their own money or with CARES funds because they probably have more money than HTA at the moment. He noted that Kaua'i and Hawai'i have already funded their own action plans. Ms. Anderson responded that when this was presented to Josh Stanbro, Executive Director and Chief Resilience Officer for the City and County of Honolulu, Office of Climate Change, Sustainability and Resiliency, and Ed Hawkins, Executive Director for the City and County of Honolulu, Office of Economic Development, they said they are prioritizing the CARES funds in areas other than tourism. Mr. Kam expressed that O'ahu is in a better position to fund that than HTA. Mr. Regan shared that the intent for the additional funding is to take the strategic plans from O'ahu and Maui and develop the tactical plans. He added that, given the budget constraints, perhaps the \$925,000 allocation needs to be reduced with the possibility of expanding the program if TAT allocations resume. Mr. Kam responded that it would be helpful for the counties to pay their share, and it seems inconsistent that Kaua'i and Hawai'i Island would not receive funding even though O'ahu has received CARES money. Chair Sanders said he understands the importance of the initiative, but questioned whether too much money is being allocated this first round given that it is a new initiative with an accelerated timeline. Mr. Regan responded that based on HTA's conversations with the counties there is a big need for an initiative like this. Mr. Regan said when this was presented to Hawai'i County Mayor Harry Kim he was very excited to bridge the apparent gap between the community and the tourism industry. Mr. Regan expressed his belief that the counties will be able to find the right projects to utilize these funds by working with the community. Mr. Kam said everyone is in agreement that community is a key pillar. He added that it would be ideal if the timeline could be further

accelerated with community engagement and feedback in August, especially given the August 1st re-opening. Mr. Atkins asked when the meeting with Kaua'i County Mayor Derek Kawakami occurred. Ms. Anderson responded that it was yesterday. Mr. Atkins asked if Mayor Kawakami said he was putting any of the \$28 million of CARES funds into tourism, to which Ms. Anderson responded that they did not discuss that. Mr. Atkins asked about the difference between implementation and on-island support. Ms. Anderson responded that the funding for on-island support is for instances in which programs require ongoing assistance such as an on-island project manager. Mr. Tatum said if the steering committee decides that a prior HTA set program is important to them, money can be allocated for that set program. He added that, under this initiative, funding for the set program would be community-driven and not HTA telling the county which programs are important.

Mr. Rafter asked who makes final decision regarding which programs receive funding. Mr. Tatum responded that the Board needs to decide the process for that, but it would serve no purpose if a committee is brought together and their recommendations are not acted upon. He added that in the end, it is still HTA money. Mr. Tatum noted that the right leaders are in place, but it is a matter of the process. He said this community engagement process needs to be shared with the community so they feel they have a voice and to utilize the counties to help do that.

7. Review of the Plans for Hawaii as a Safe Destination:

Ms. Herman recognized Mr. Regan to discuss the visitor airport arrival process. He said, when passengers arrive, they have their temperature taken, complete a couple of health screening forms, and have cellphone numbers and lodging reservations verified. The process can take between thirty and forty-five minutes. He noted that passengers can be removed from line for additional health screening if, for example, their temperature is too high or lodging cannot be verified. Once passengers are cleared, they can claim their baggage and continue into 14-day quarantine unless they have pre-test certification. Mr. Regan said HTA has been involved in this process and have been providing resources since March. He noted that the arrival process is multi-layered and brings some level of comfort to visitors and to the community. Mr. Kam asked if the data collection at the airport is still manual. Mr. Regan responded in the affirmative. He discussed the health screening changes to the visitor arrival form and added that the state's goal is to develop a digitized form that is accessible by DOH, the Department of Transportation (DOT), and any other department or agency involved. Mr. Regan said the project is ready to go, but some additional equipment needs to be purchased and training needs to occur. Mr. Kam asked if ESRI will be used for domestic travel arrivals. Mr. Regan responded that if it is successful on the inter-island side, the vision is for ESRI to be used for trans-Pacific flights as well.

Chair Fried asked what happens if a passenger arrives without a test or refuses to sign the health forms. Mr. Regan responded that the enforcement process is up to DOH. Mr. Tatum added there will be five weeks to get the message out that travelers need a pre-test to come. He noted that he does not think it feasible for testing to be performed here because

Hawai'i does not have the capacity for it. Mr. Kam agreed and added that the goal is to ensure that people pre-test before their flights and that there are no shortcuts to avoid the 14-day quarantine. Mr. Regan said there will be a number of ways to incorporate the pre-test into the digital form process.

Mr. Atkins asked who will be manning these stations at the airport. Mr. Regan responded that HTA has not discussed that with DOT or DOH, but HTA has provided them with information pertaining to the resources and manpower HTA has expended with the low number of visitor arrivals. Mr. Regan added that the manpower and resources required will be significant when Hawai'i reopens. Mr. Kam asked Mr. Monahan and Mr. Talwar what type of demand can be expected with the announcement of the pre-test program. Mr. Monahan responded that it is difficult to project, but it will be a pretty strong response. He added that the pre-test program and 14-day quarantine need to be strictly enforced, and the message needs to be aggressively communicated. Mr. Tatum and Mr. Regan both commended Jennifer Chun, HTA Director of Tourism Research, for her work during the COVID-19 mitigation efforts.

Mr. Tatum said, while looking on Alaska Airlines' website, only half of the seats are available so the airlines are serious about not filling their planes to capacity. Mr. Kam asked Chair Sanders for his thoughts concerning demand to travel to Hawai'i with Gov. Ige's announcement. Chair Sanders responded that he believes the U.S. West Coast will travel quickly, the U.S. East Coast may take longer because it is much farther, and Japan will be delayed until at least October. Mr. Atkins asked Chair Sanders how many hotels he thinks will begin to ramp up. Chair Sanders estimated about 20 hotels and said most will likely open in October. Mr. Tatum added that the main companies will probably open single properties incrementally and see how the volume evolves. Chair Sanders said the hotels will maybe open up 25% capacity and increase from there.

Chair Sanders recognized Mr. Talwar to discuss messaging at the airport. Mr. Talwar said they would be sharing messages from the "Kuleana" campaign and putting together videos sharing the process travelers would undergo upon arriving at Hawai'i's airports.

8. Adjournment:

The meeting adjourned at 4:06 PM.

Respectfully submitted:



Reyn S.P. Ono
Recorder

Agenda Item #3:

Report of the Hawai'i forward
looking bookings
Global Agency Pro

Travel Agency Bookings as of July 21, 2020

HTA Marketing Standing Committee Meeting
July 29, 2020



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

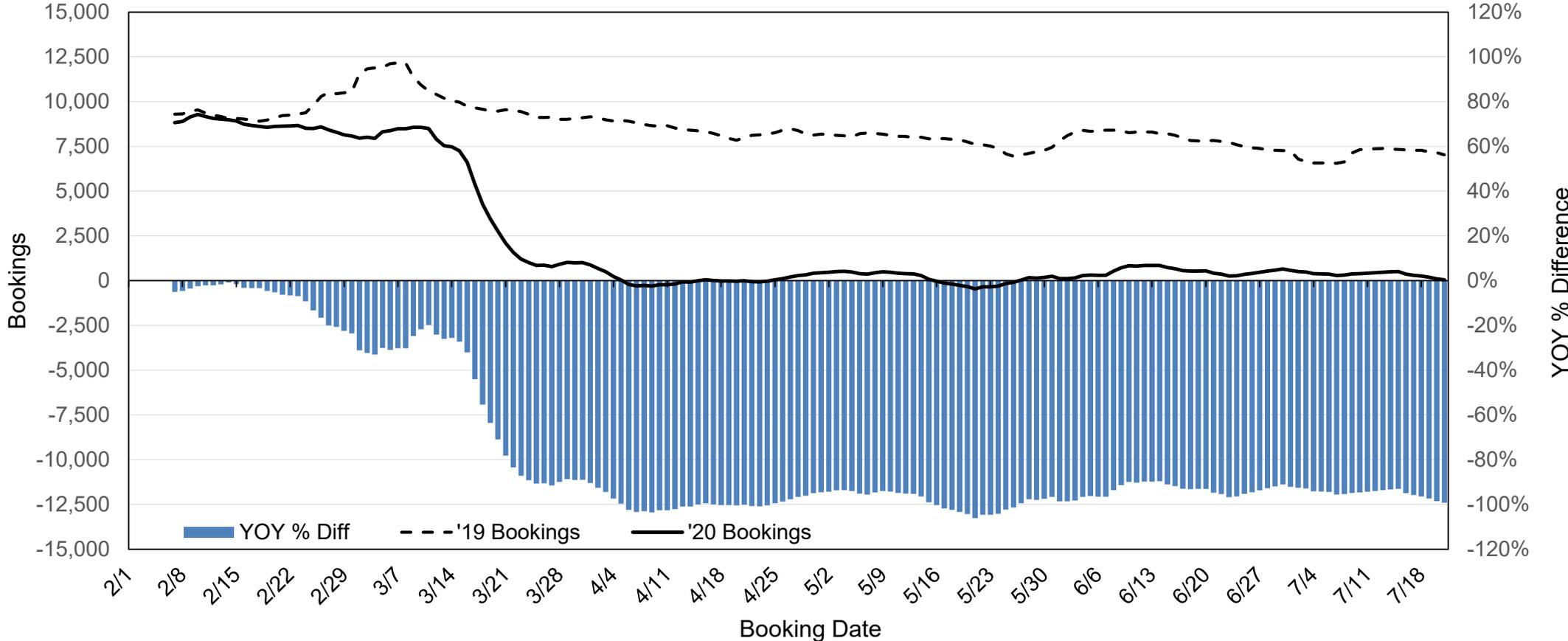
- Bookings
 - Net sum of the number of visitors (i.e., excluding Hawai'i residents and inter-island travelers) from Sales transactions counted, including Exchanges and Refunds.
- Booking Date
 - The date on which the ticket was purchased by the passenger. Also known as the Sales Date
- Travel Date
 -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

U.S. Bookings

HAWAII TOURISM
AUTHORITY

Travel Agency Bookings to Hawai'i – Historical Trend

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

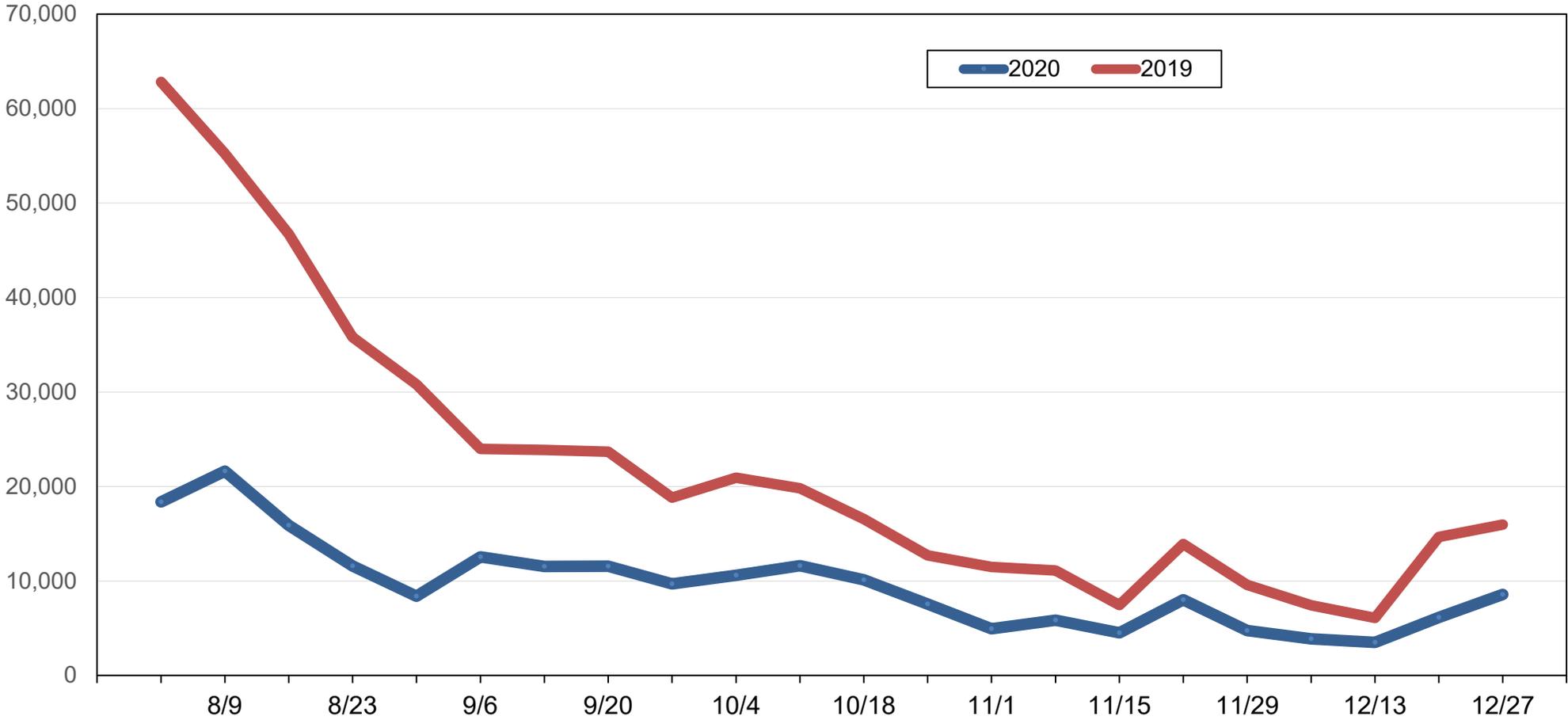


*Future Arrivals refers to all arrivals that are 'future' relative to the referenced booking date.

Update: Jul 21, 2020

Travel Agency Weekly Bookings for Future Travel to Hawai'i

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of July 21, 2020
U.S.

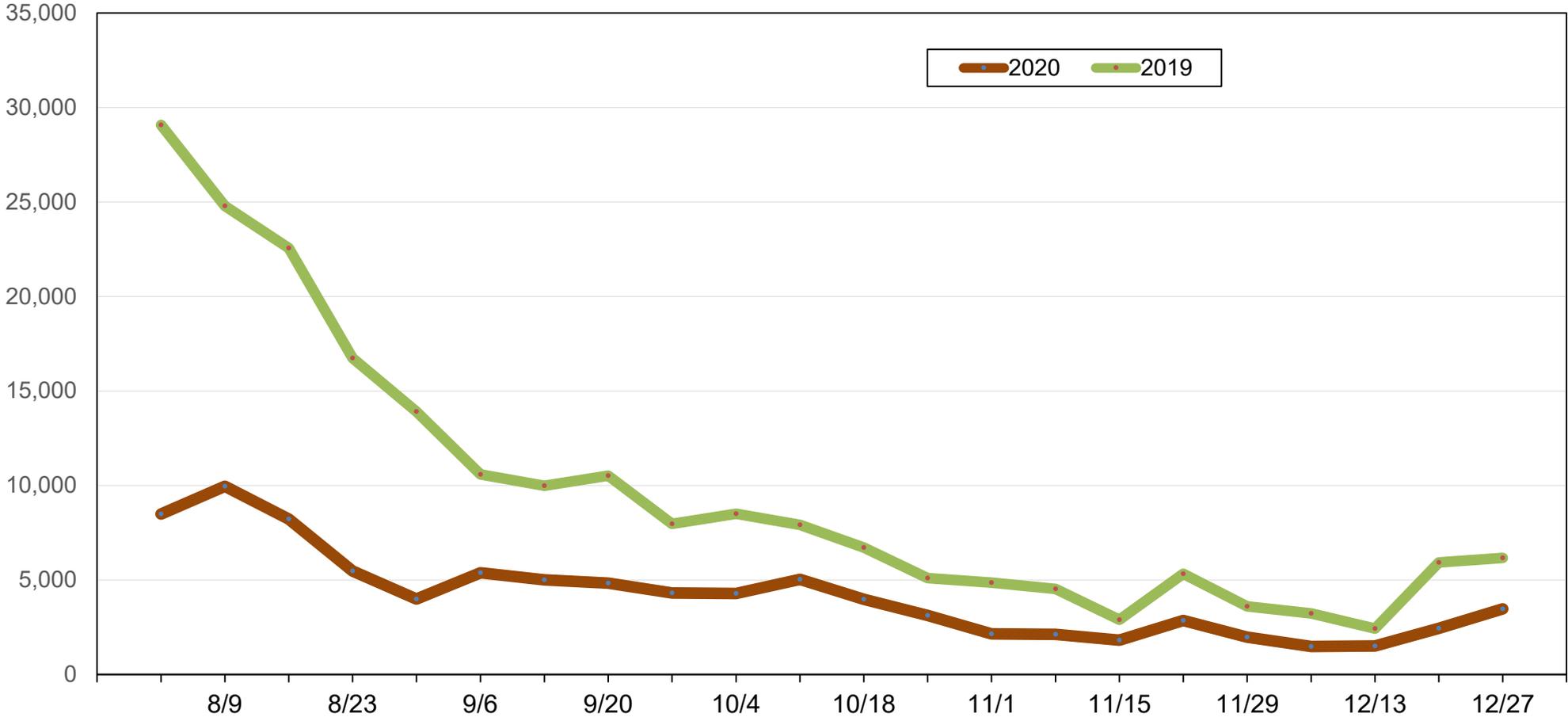


Source: Global Agency Pro



Travel Agency Weekly Bookings for Future Travel to O‘ahu

Travel Agency Weekly Bookings for Future Travel to O‘ahu as of July 21, 2020
U.S.

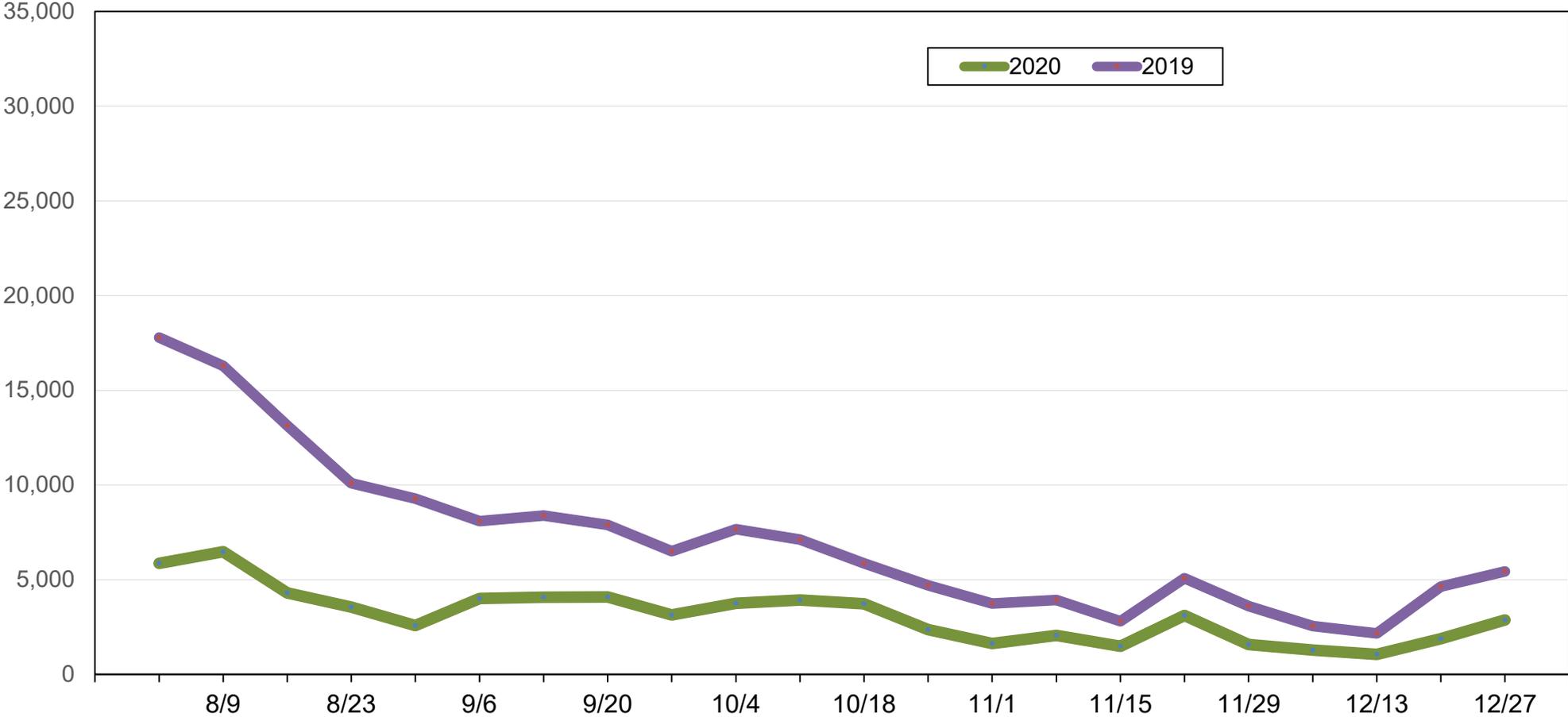


Source: Global Agency Pro



Travel Agency Weekly Bookings for Future Travel to Maui

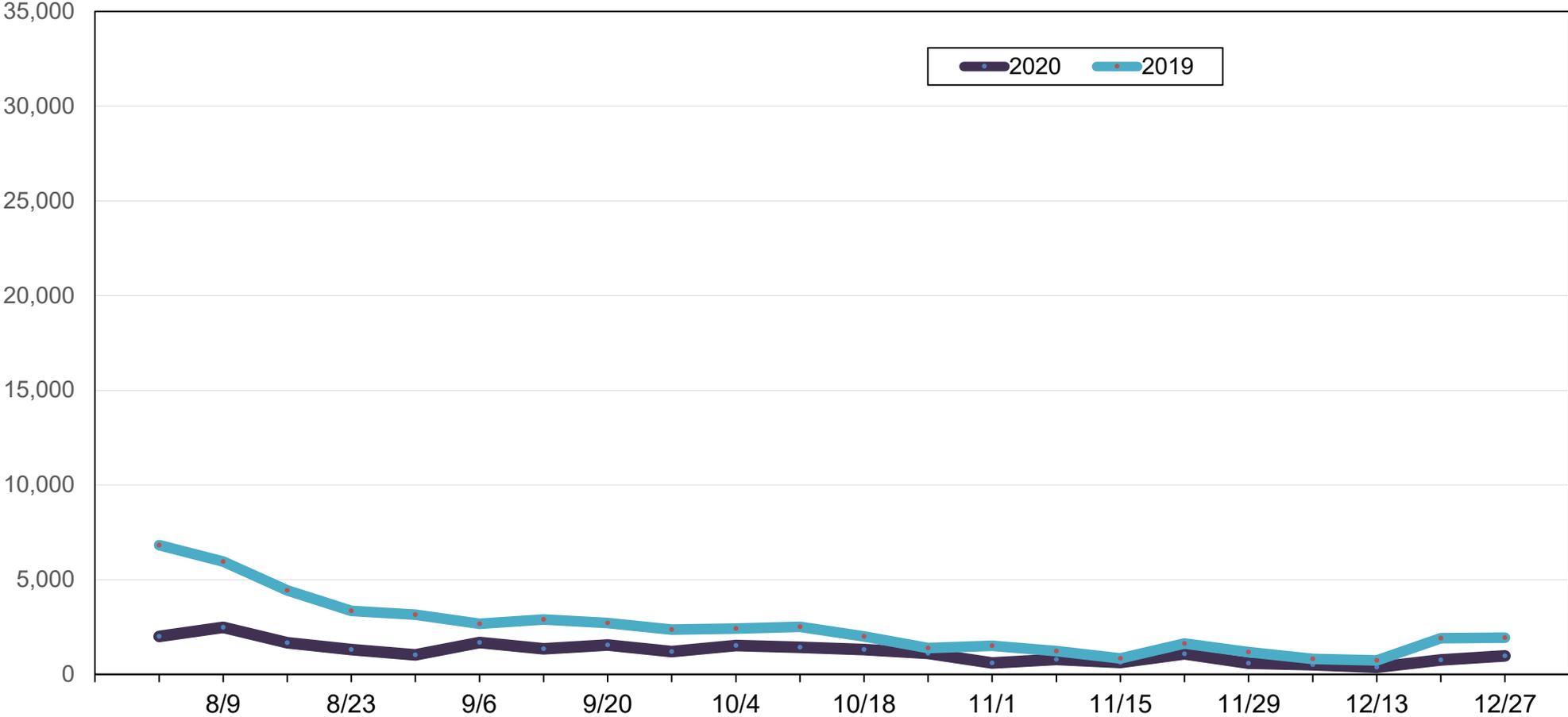
Travel Agency Weekly Bookings for Future Travel to Maui as of July 21, 2020
U.S.



Source: Global Agency Pro

Travel Agency Weekly Bookings for Future Travel to Kaua'i

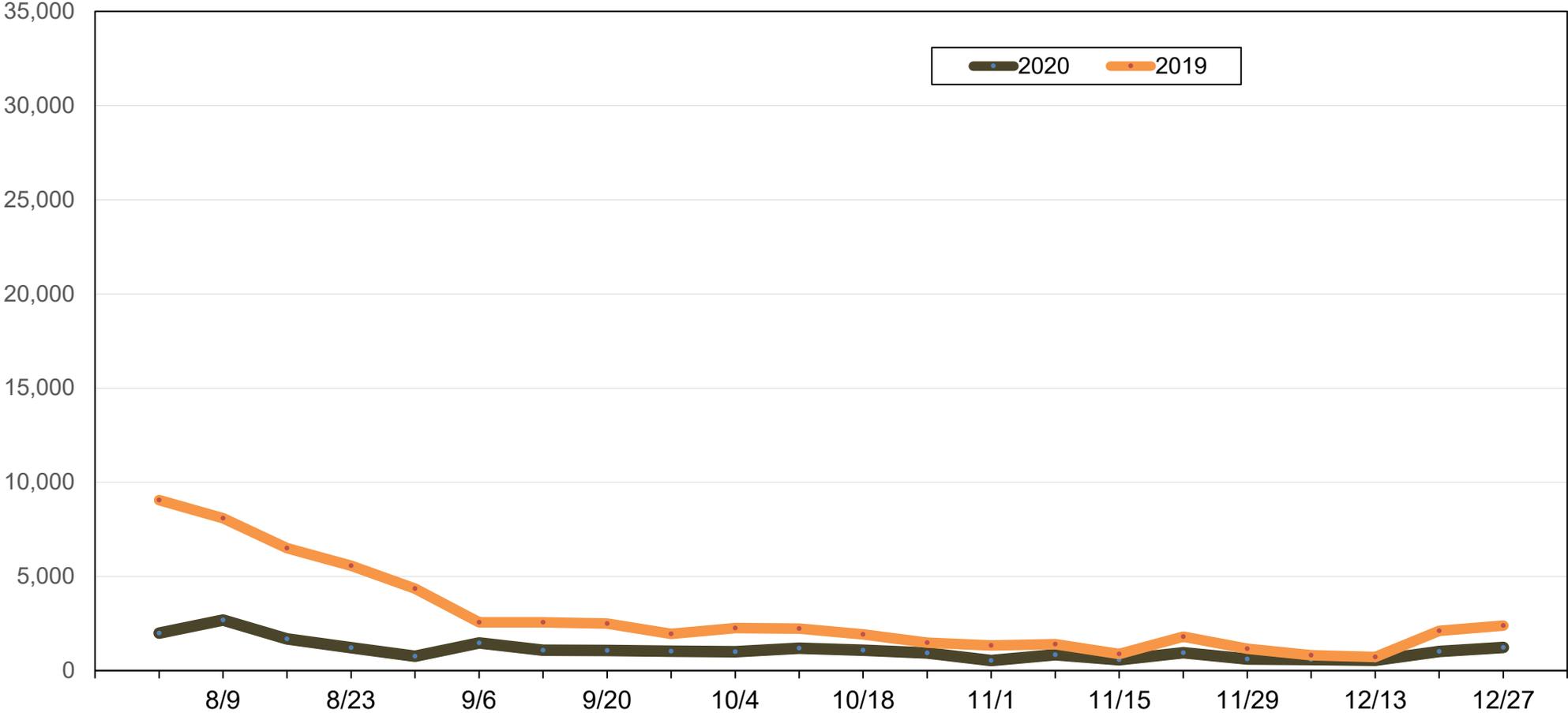
Travel Agency Weekly Bookings for Future Travel to Kaua'i as of July 21, 2020
U.S.



Source: Global Agency Pro

Travel Agency Weekly Bookings for Future Travel to Hawai'i Island

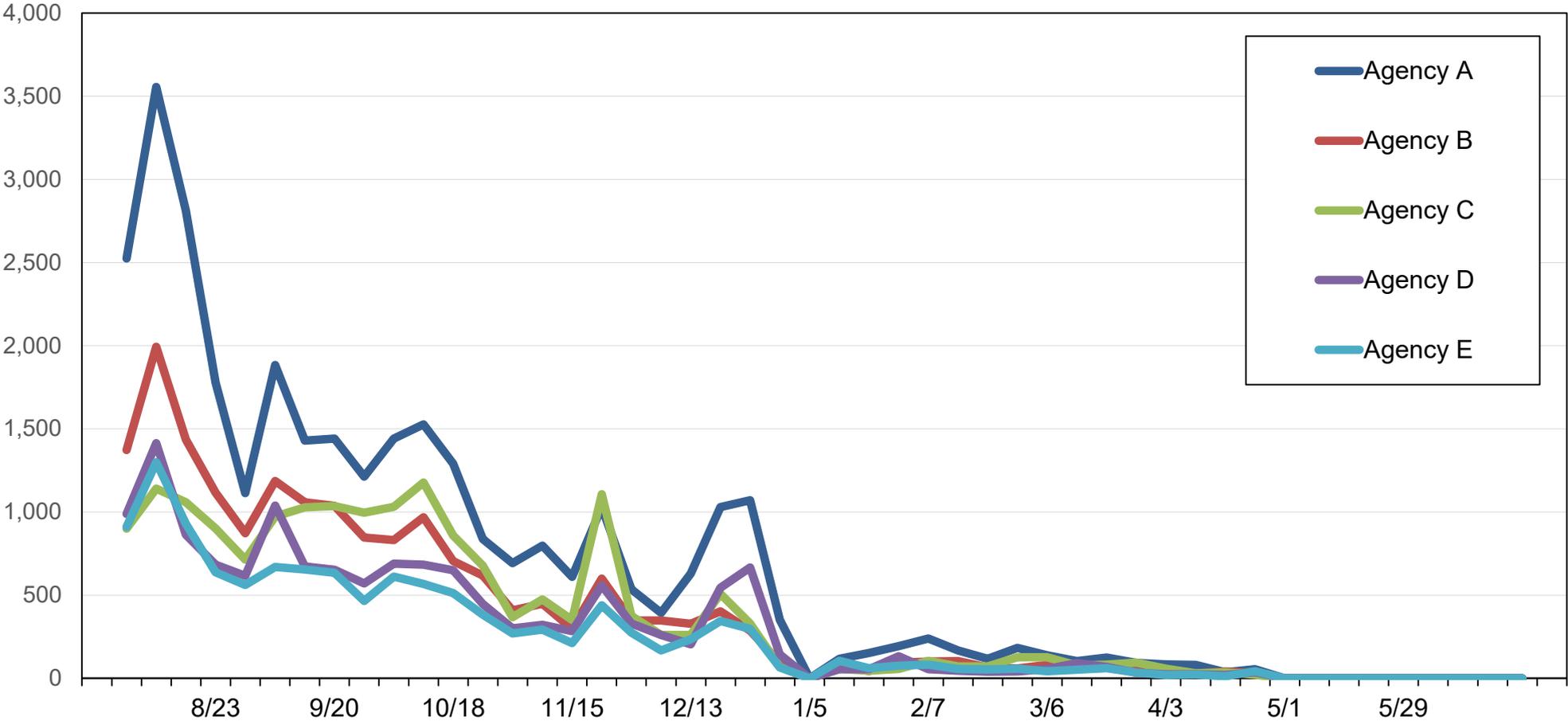
Travel Agency Weekly Bookings for Future Travel to Hawai'i Island as of July 21, 2020
U.S.



Source: Global Agency Pro

Travel Agency Weekly Bookings for Future Travel to Hawai'i

Top Five Travel Agency Weekly Bookings for Future Travel to Hawai'i as of July 21, 2020
U.S.



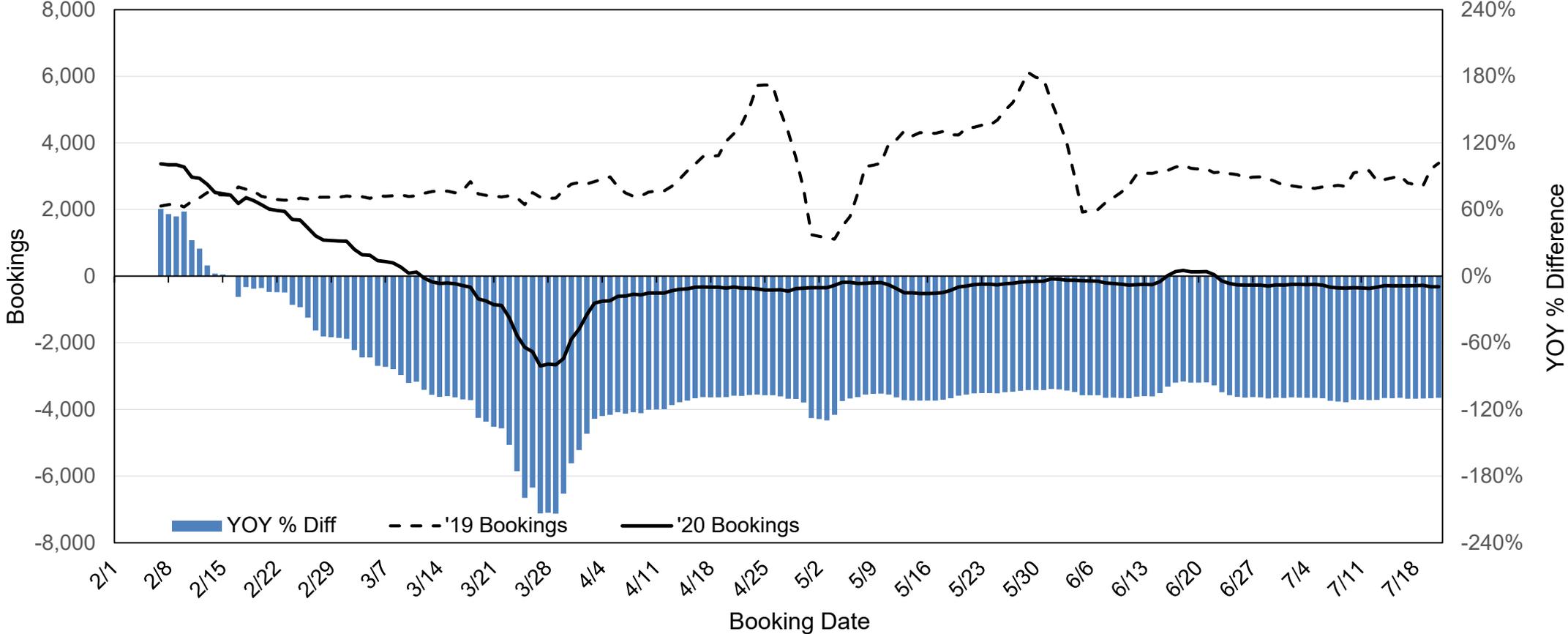
Source: Global Agency Pro

Japan Bookings

HAWAII TOURISM
AUTHORITY

Travel Agency Bookings to Hawai'i – Historical Trend

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

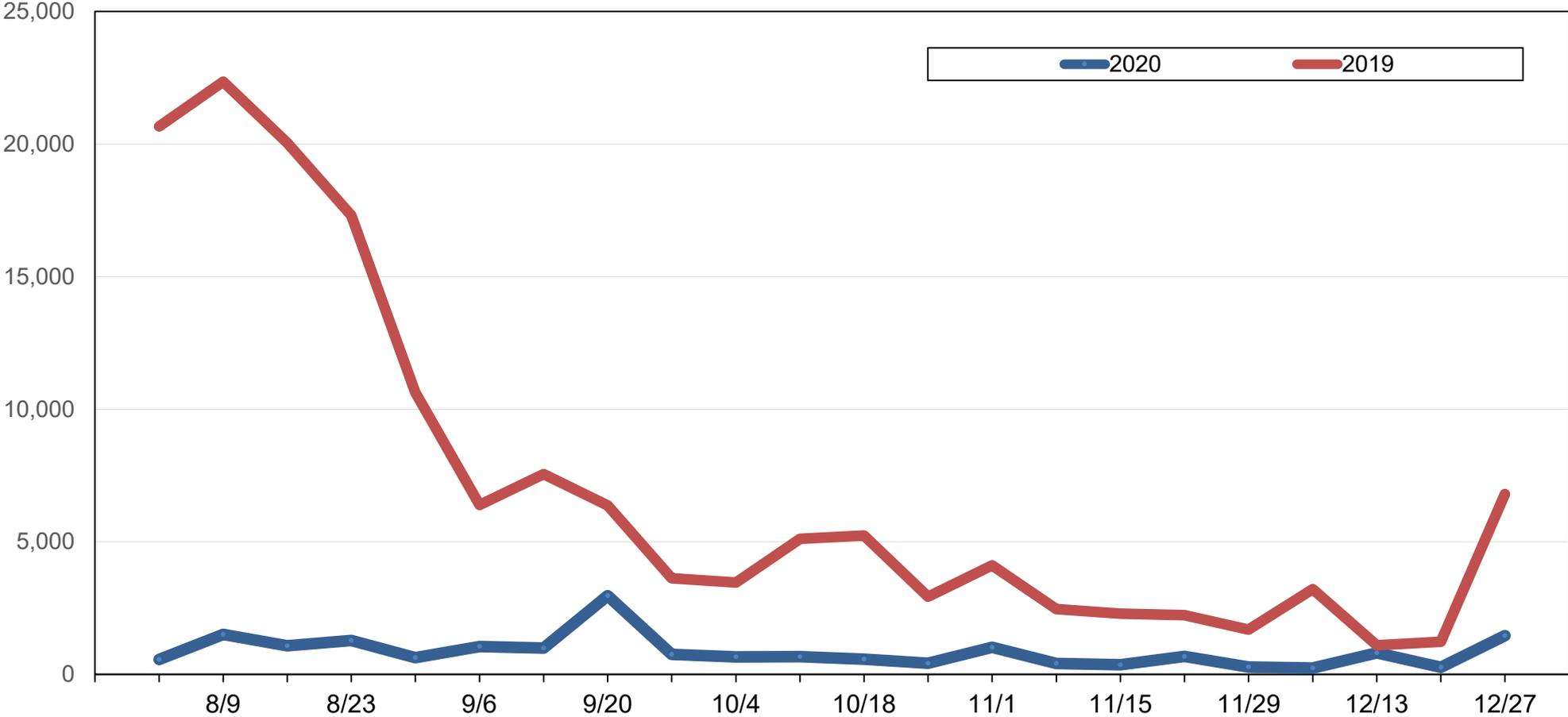


*Future Arrivals refers to all arrivals that are 'future' relative to the referenced booking date.

Update: Jul 21, 2020

Travel Agency Weekly Bookings for Future Travel to Hawai'i

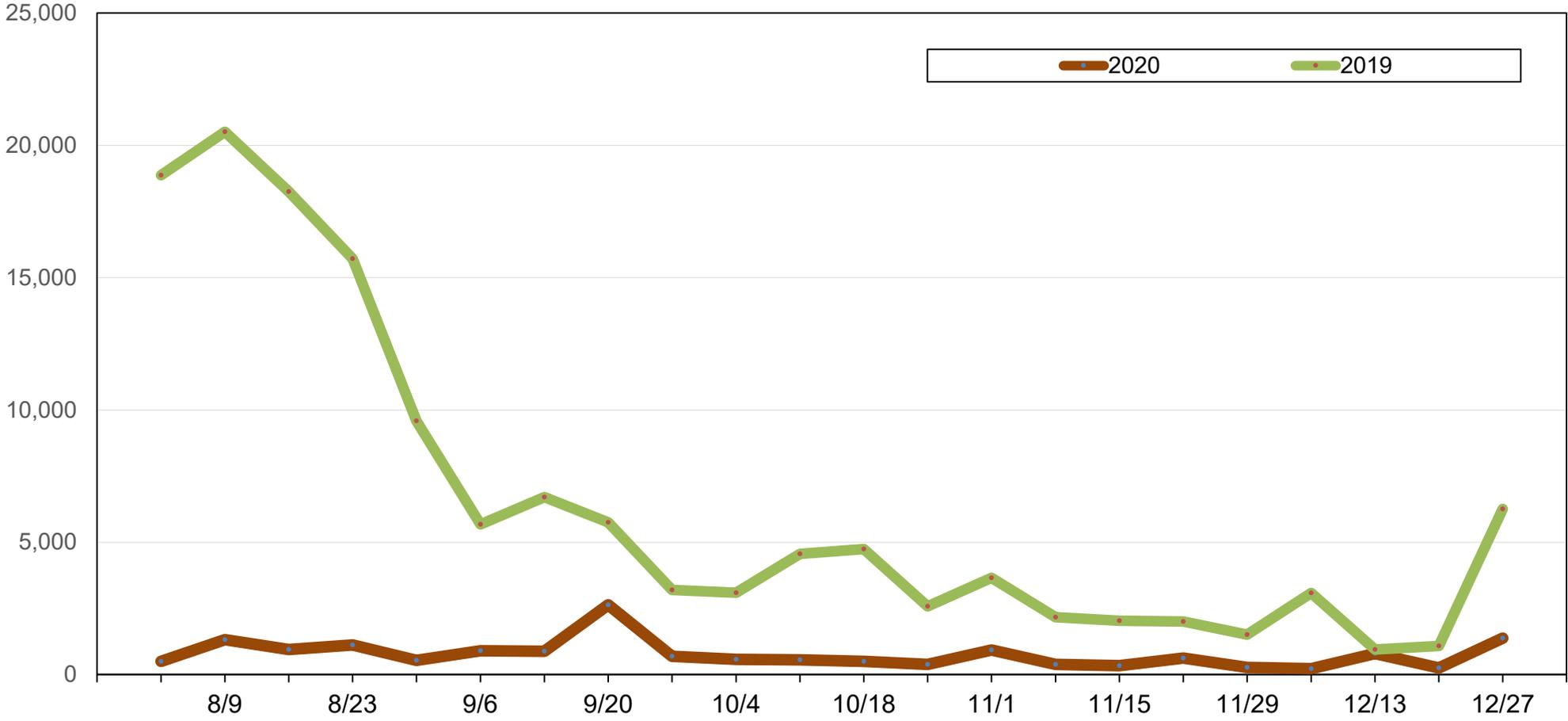
Travel Agency Weekly Bookings for Future Travel to Hawai'i as of July 21, 2020 Japan



Source: Global Agency Pro

Travel Agency Weekly Bookings for Future Travel to O‘ahu

Travel Agency Weekly Bookings for Future Travel to O‘ahu as of July 21, 2020 Japan

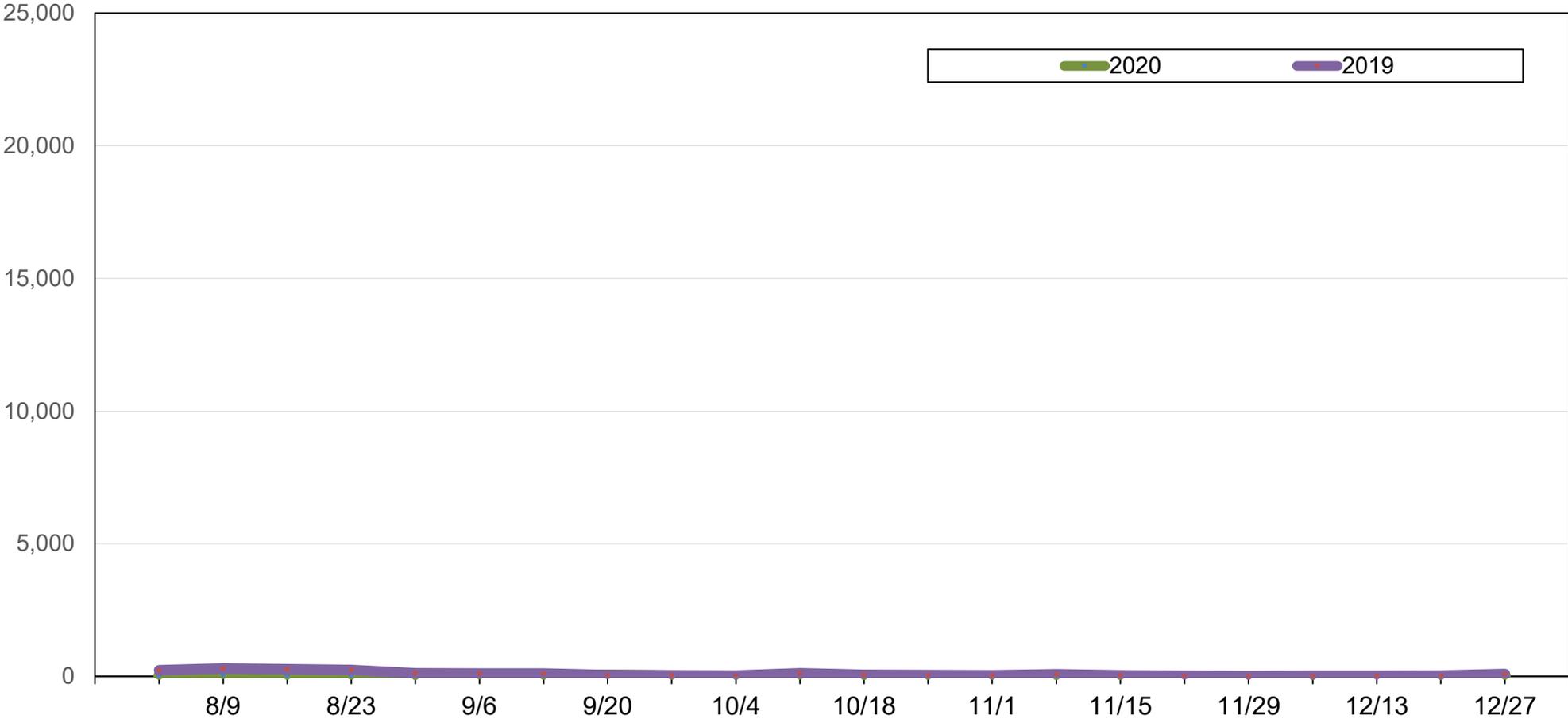


Source: Global Agency Pro



Travel Agency Weekly Bookings for Future Travel to Maui

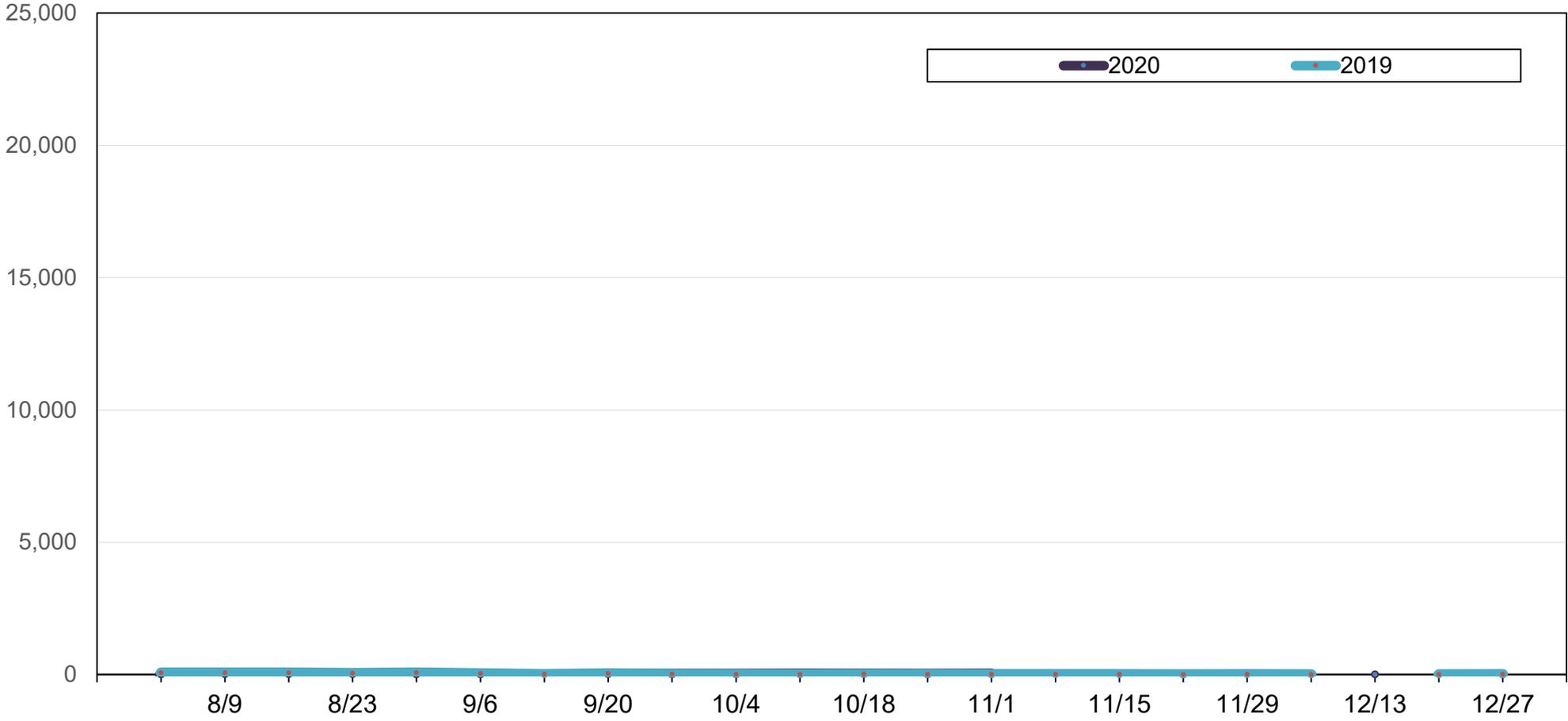
Travel Agency Weekly Bookings for Future Travel to Maui as of July 21, 2020
Japan



Source: Global Agency Pro

Travel Agency Weekly Bookings for Future Travel to Kaua'i

Travel Agency Weekly Bookings for Future Travel to Kaua'i as of July 21, 2020
Japan

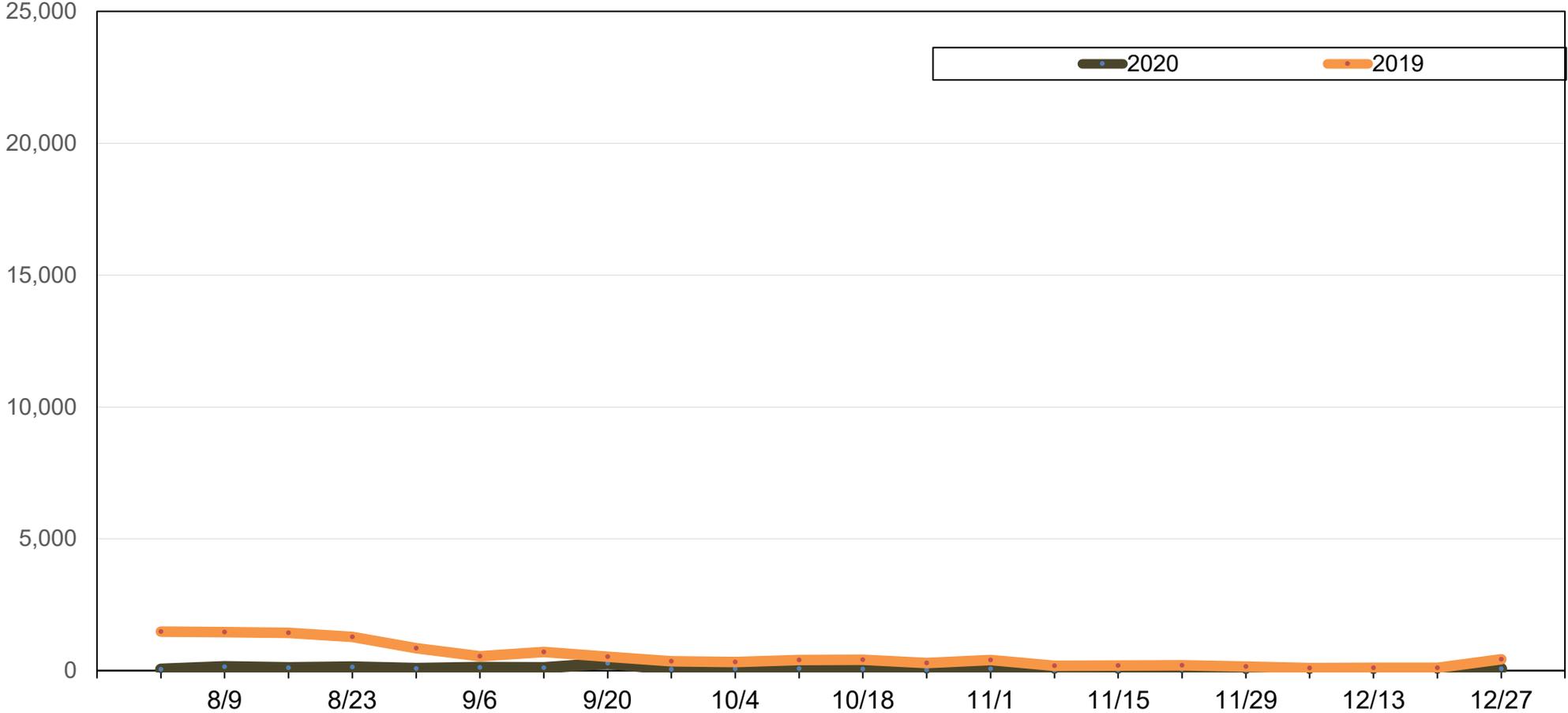


Source: Global Agency Pro



Travel Agency Weekly Bookings for Future Travel to Hawai'i Island

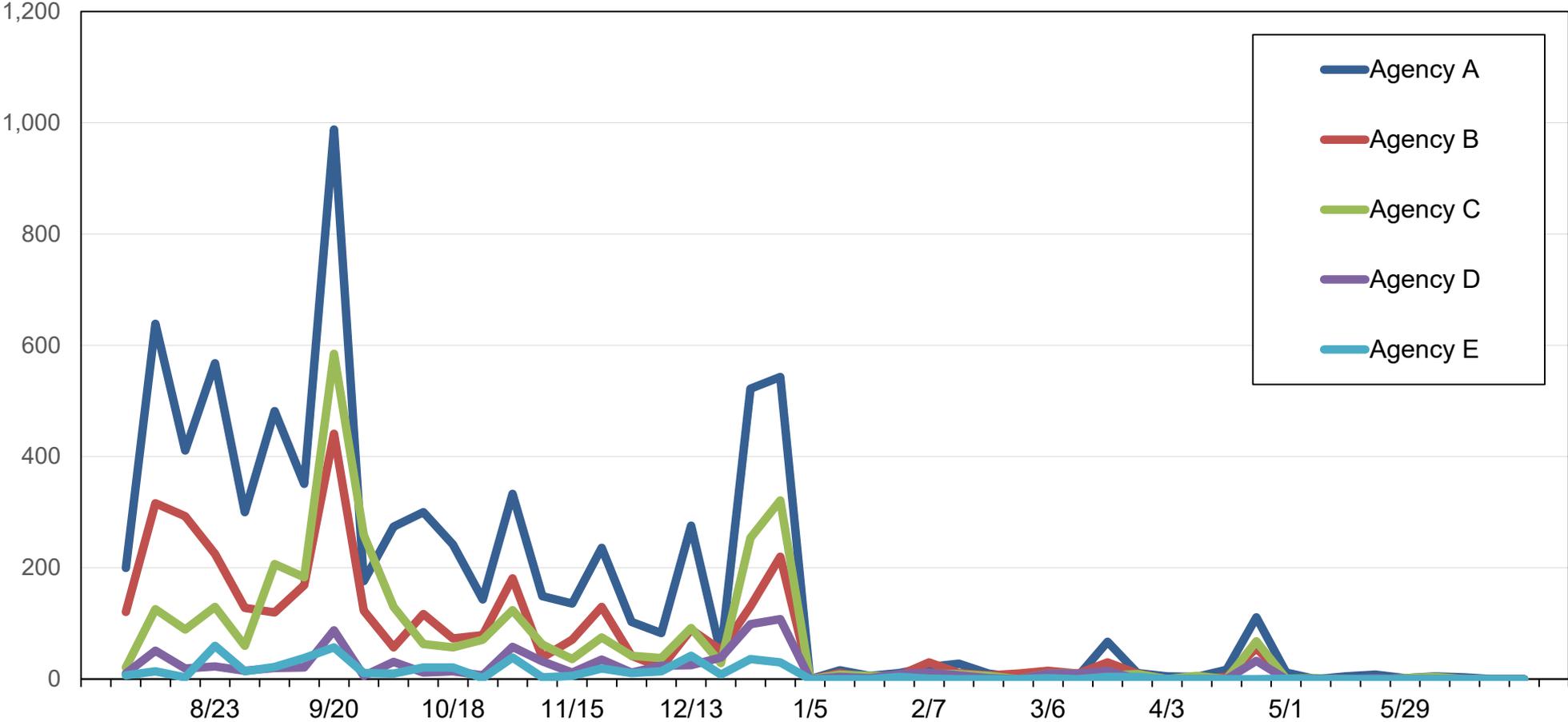
Travel Agency Weekly Bookings for Future Travel to Hawai'i Island as of July 21, 2020 Japan



Source: Global Agency Pro

Travel Agency Weekly Bookings for Future Travel to Hawai'i

Top Five Travel Agency Weekly Bookings for Future Travel to Hawai'i as of July 21, 2020 Japan



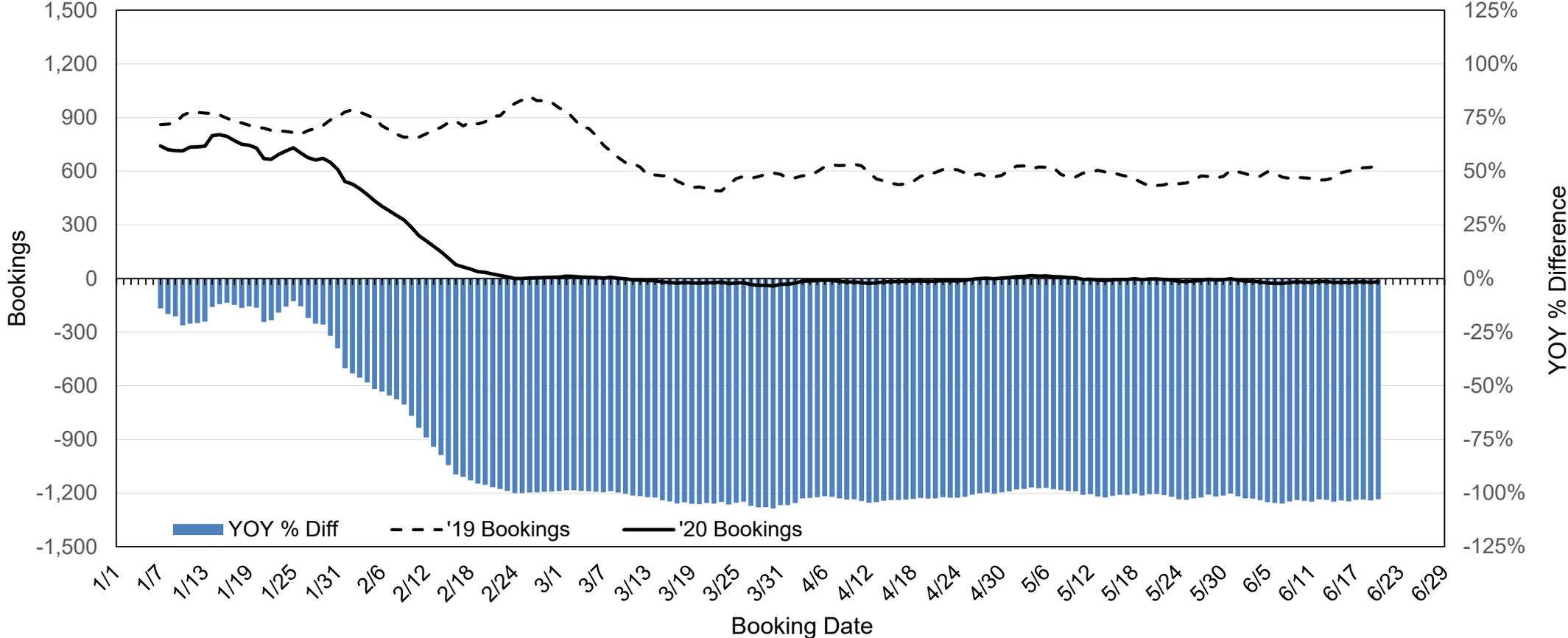
Source: Global Agency Pro

Canada Bookings

HAWAII TOURISM
AUTHORITY

Travel Agency Bookings to Hawai'i – Historical Trend

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

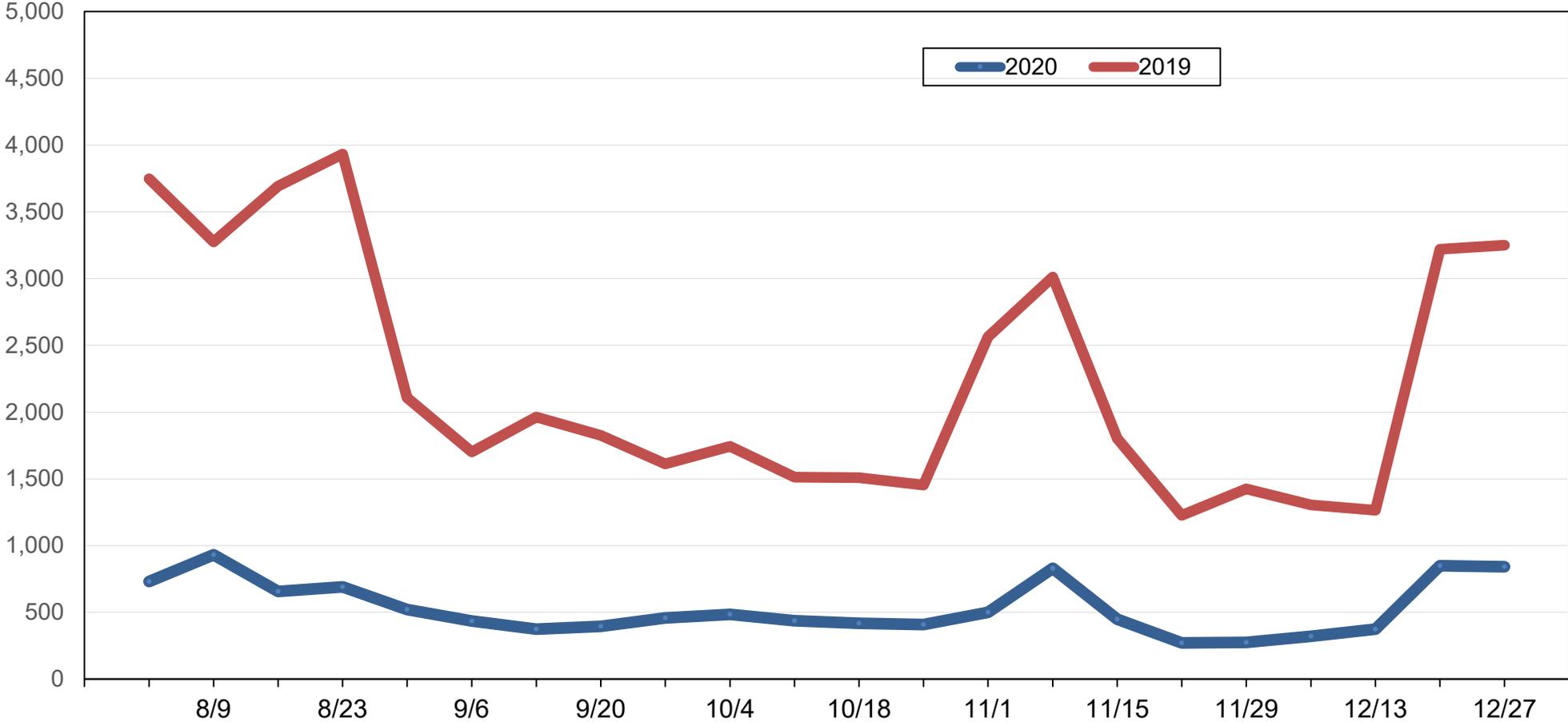


*Future Arrivals refers to all arrivals that are 'future' relative to the referenced booking date.

Update: Jul 21, 2020

Travel Agency Weekly Bookings for Future Travel to Hawai'i

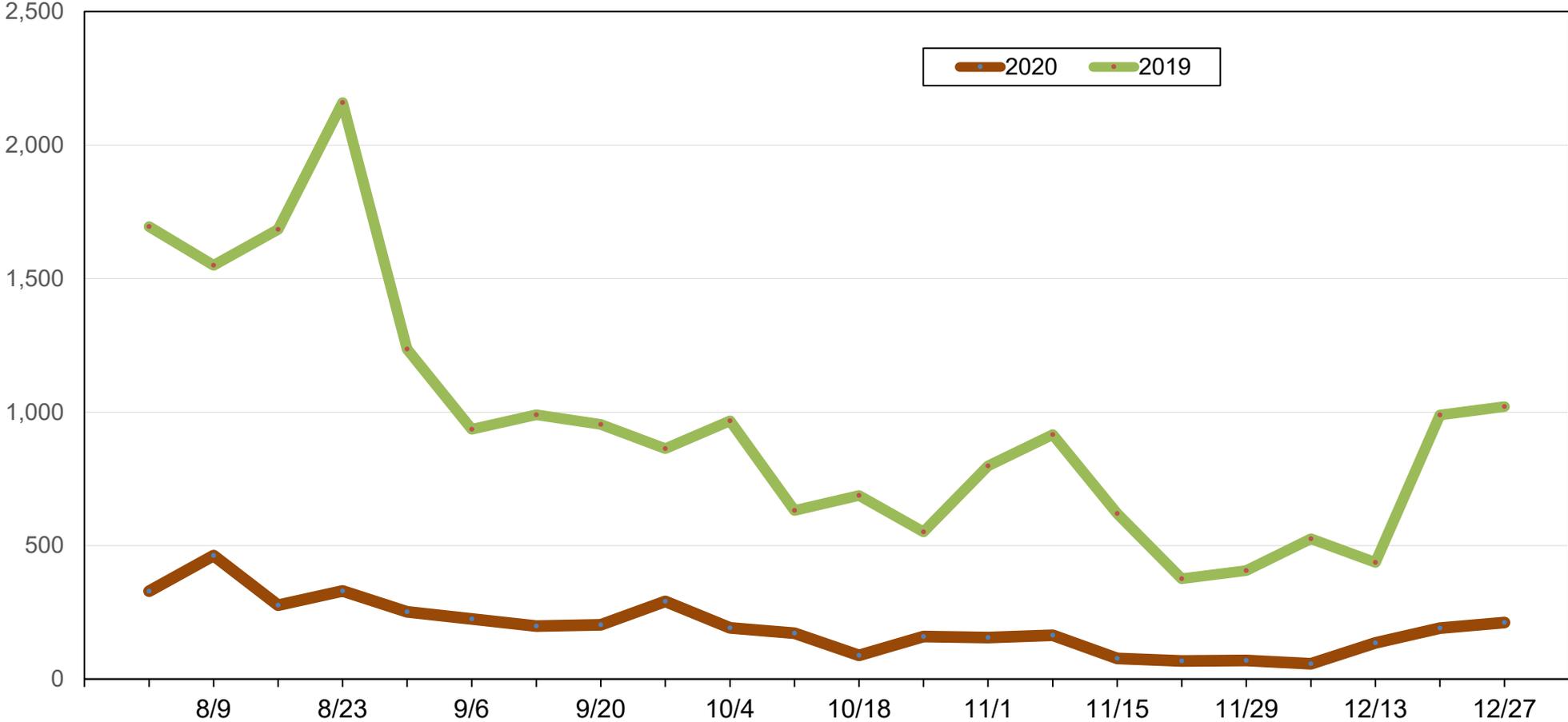
Travel Agency Weekly Bookings for Future Travel to Hawai'i as of July 21, 2020 Canada



Source: Global Agency Pro

Travel Agency Weekly Bookings for Future Travel to O‘ahu

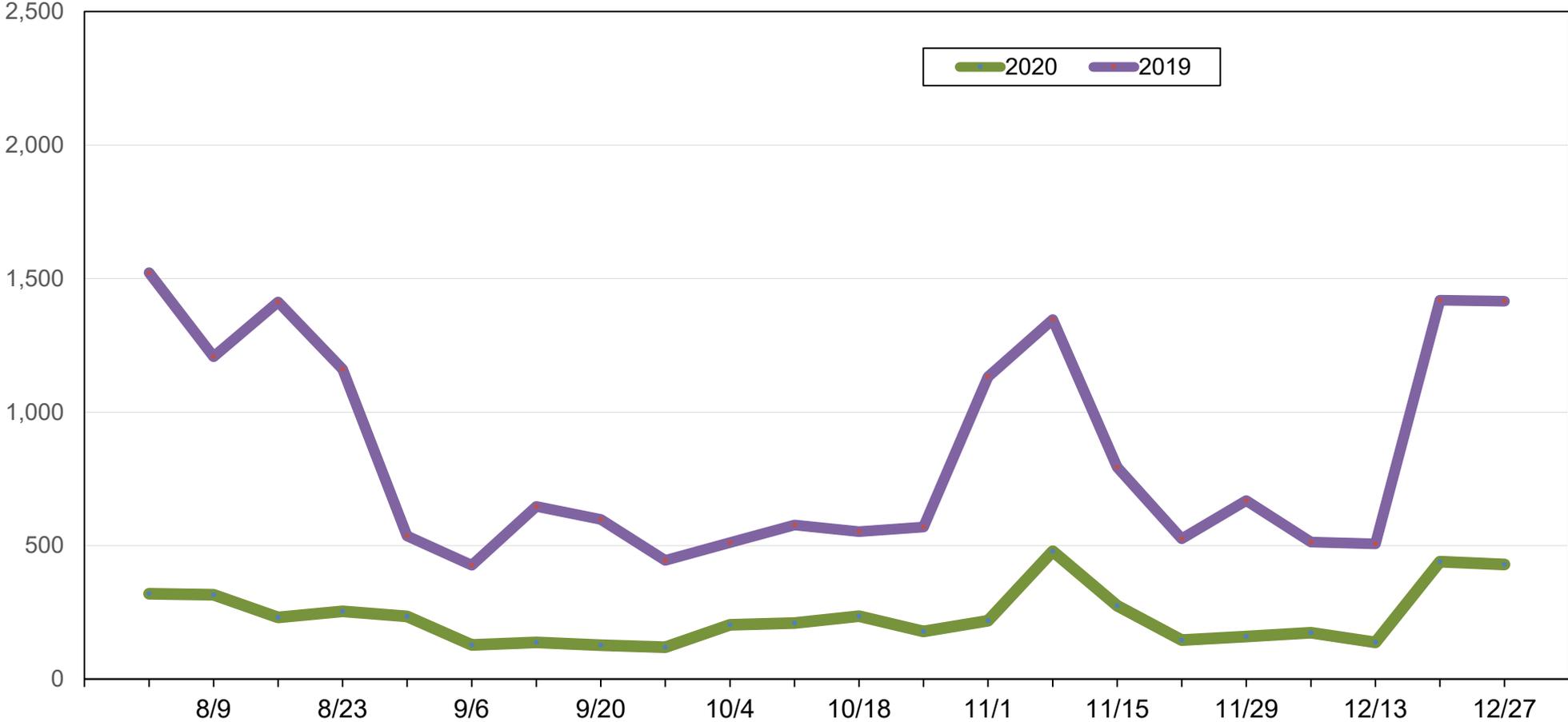
Travel Agency Weekly Bookings for Future Travel to O‘ahu as of July 21, 2020 Canada



Source: Global Agency Pro

Travel Agency Weekly Bookings for Future Travel to Maui

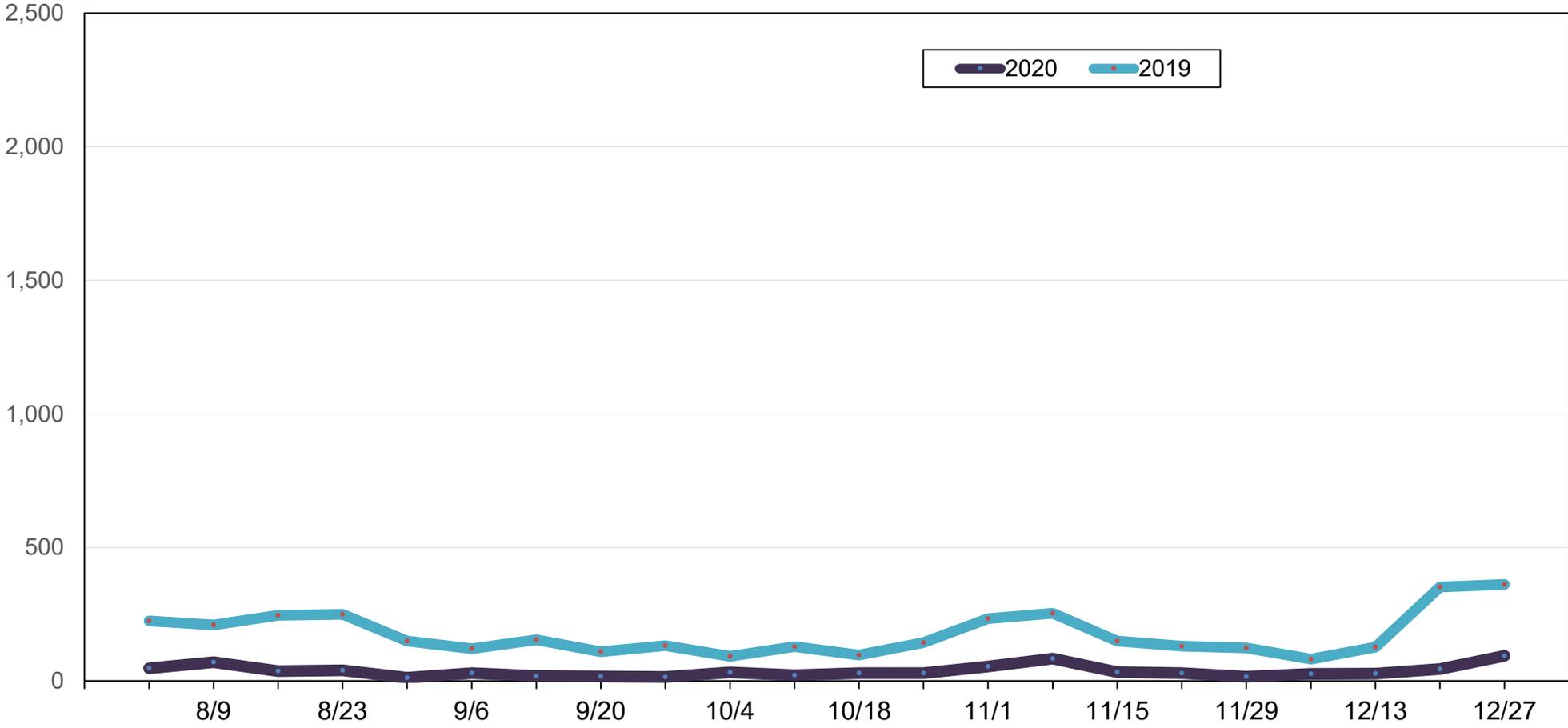
Travel Agency Weekly Bookings for Future Travel to Maui as of July 21, 2020
Canada



Source: Global Agency Pro

Travel Agency Weekly Bookings for Future Travel to Kaua'i

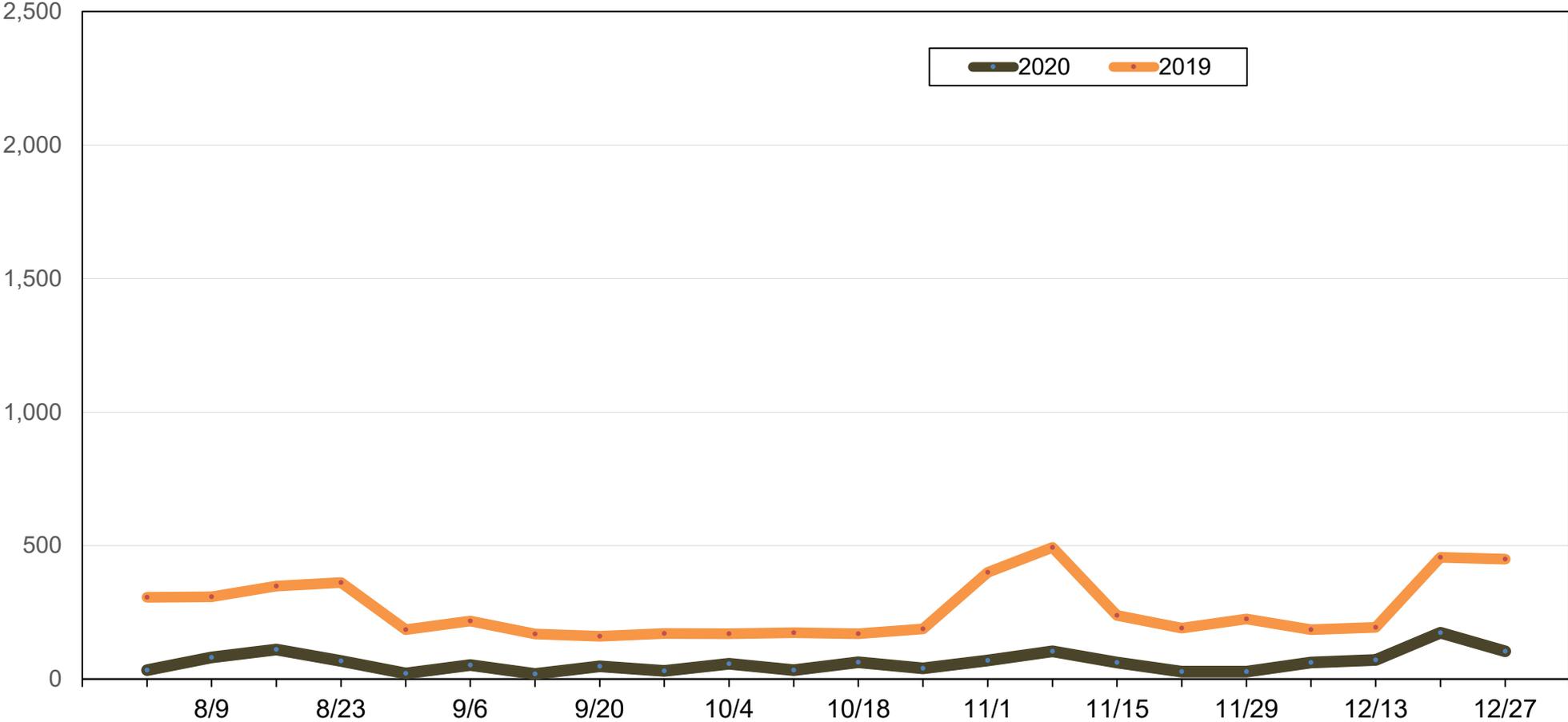
Travel Agency Weekly Bookings for Future Travel to Kaua'i as of July 21, 2020
Canada



Source: Global Agency Pro

Travel Agency Weekly Bookings for Future Travel to Hawai'i Island

Travel Agency Weekly Bookings for Future Travel to Hawai'i Island as of July 21, 2020 Canada



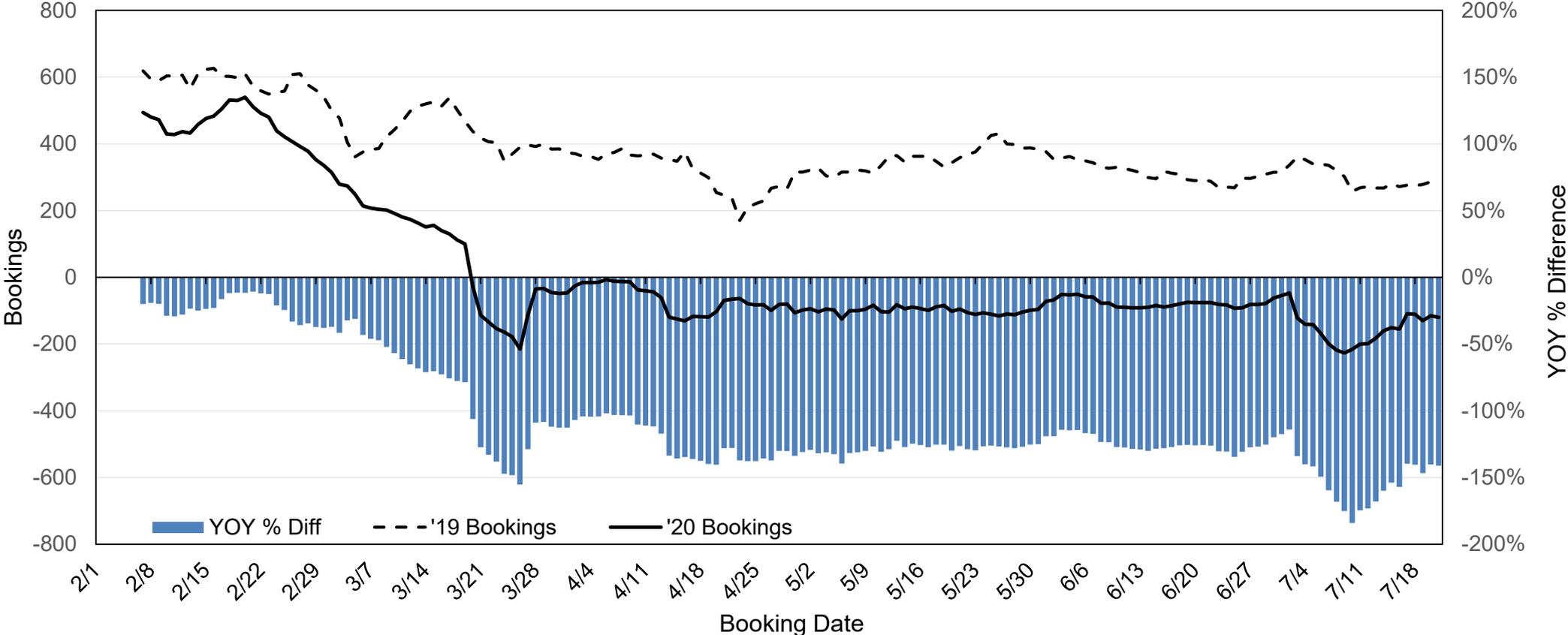
Source: Global Agency Pro

Australia Bookings

HAWAII TOURISM
AUTHORITY

Travel Agency Bookings to Hawai'i – Historical Trend

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

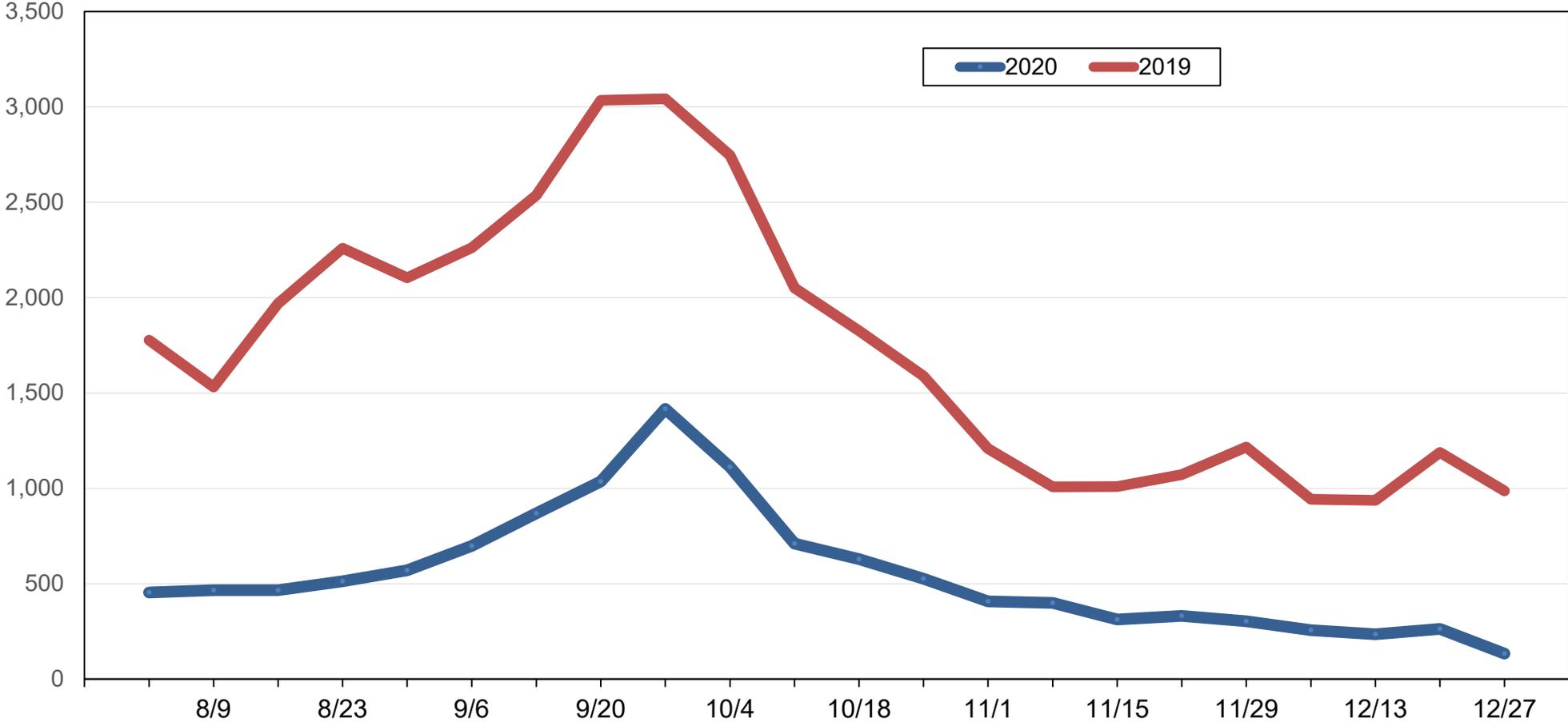


*Future Arrivals refers to all arrivals that are 'future' relative to the referenced booking date.

Update: Jul 21, 2020

Travel Agency Weekly Bookings for Future Travel to Hawai'i

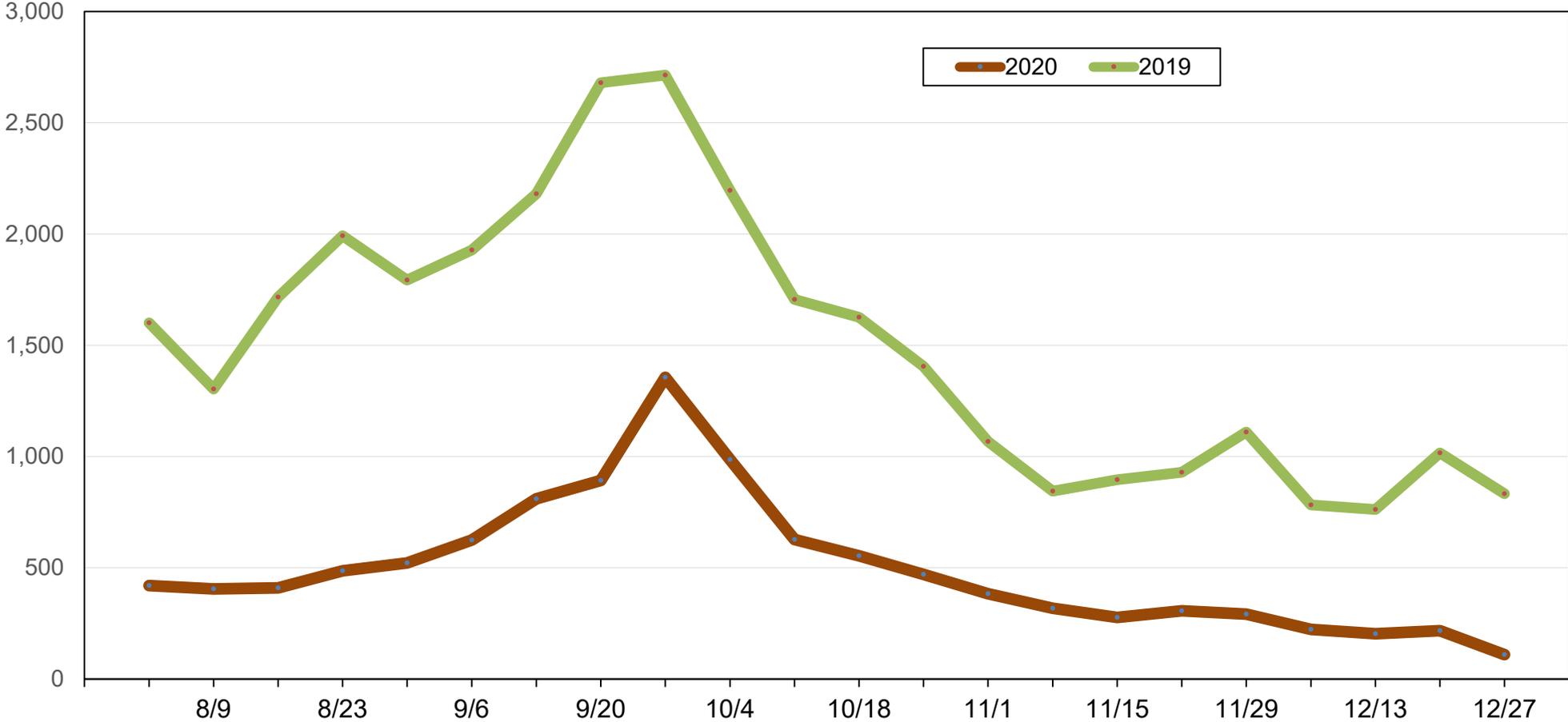
Travel Agency Weekly Bookings for Future Travel to Hawai'i as of July 21, 2020 Australia



Source: Global Agency Pro

Travel Agency Weekly Bookings for Future Travel to O‘ahu

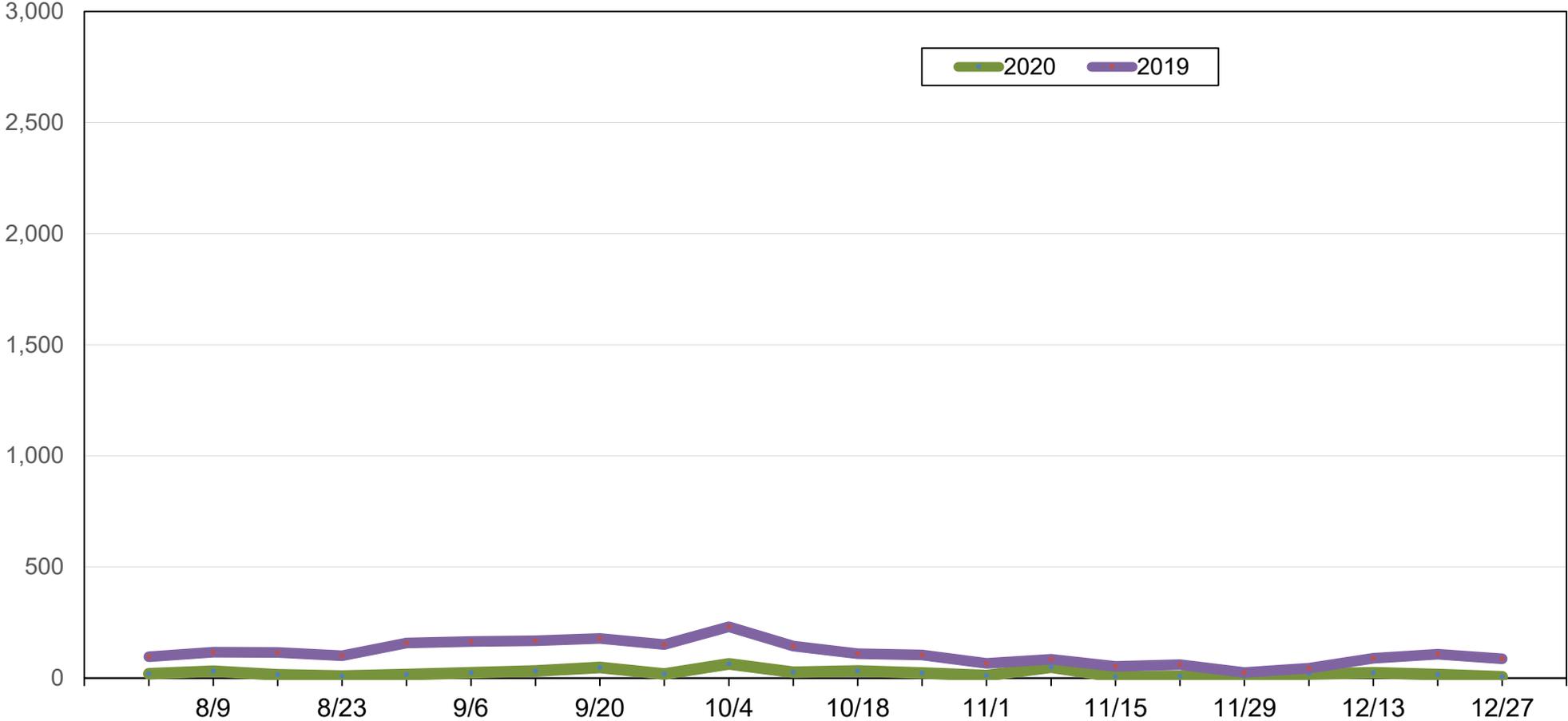
Travel Agency Weekly Bookings for Future Travel to O‘ahu as of July 21, 2020
Australia



Source: Global Agency Pro

Travel Agency Weekly Bookings for Future Travel to Maui

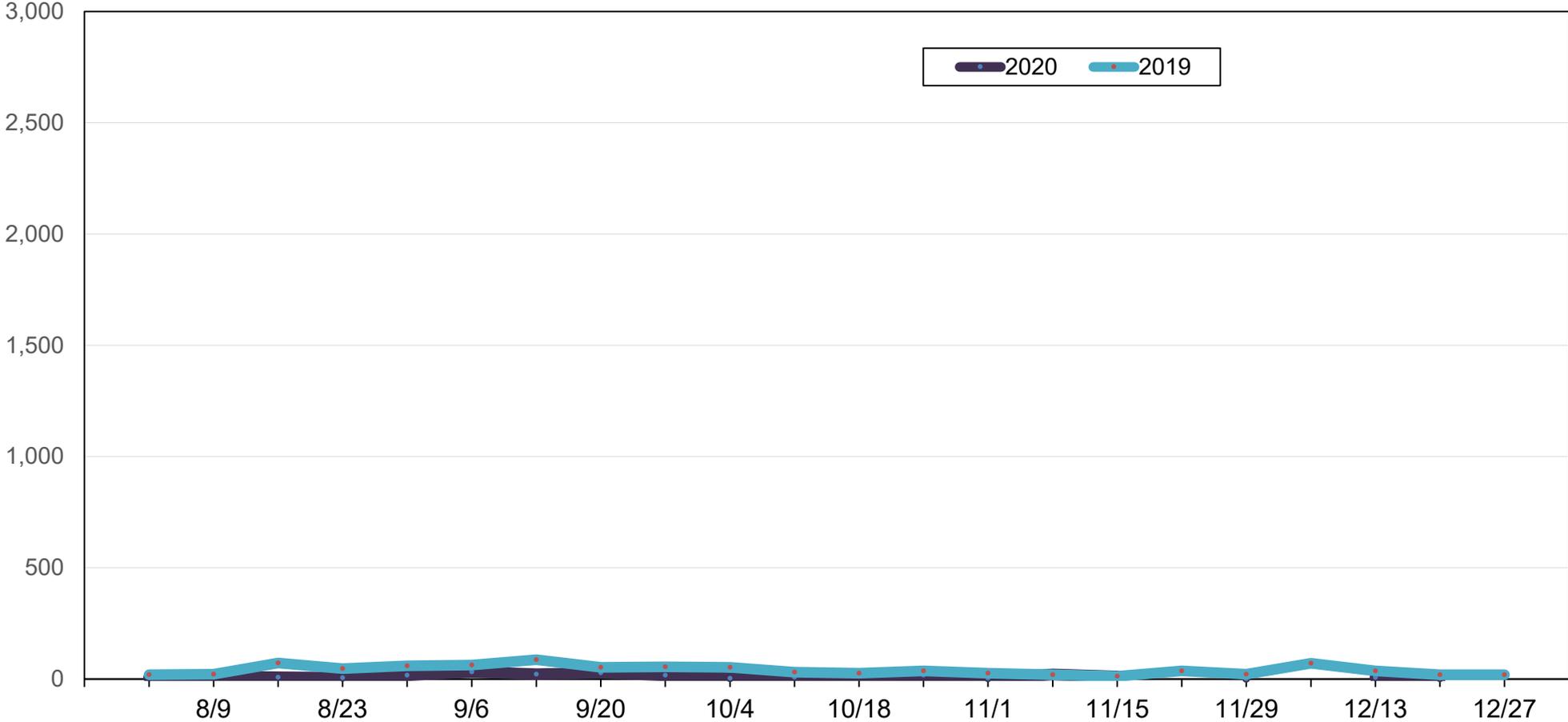
Travel Agency Weekly Bookings for Future Travel to Maui as of July 21, 2020
Australia



Source: Global Agency Pro

Travel Agency Weekly Bookings for Future Travel to Kaua'i

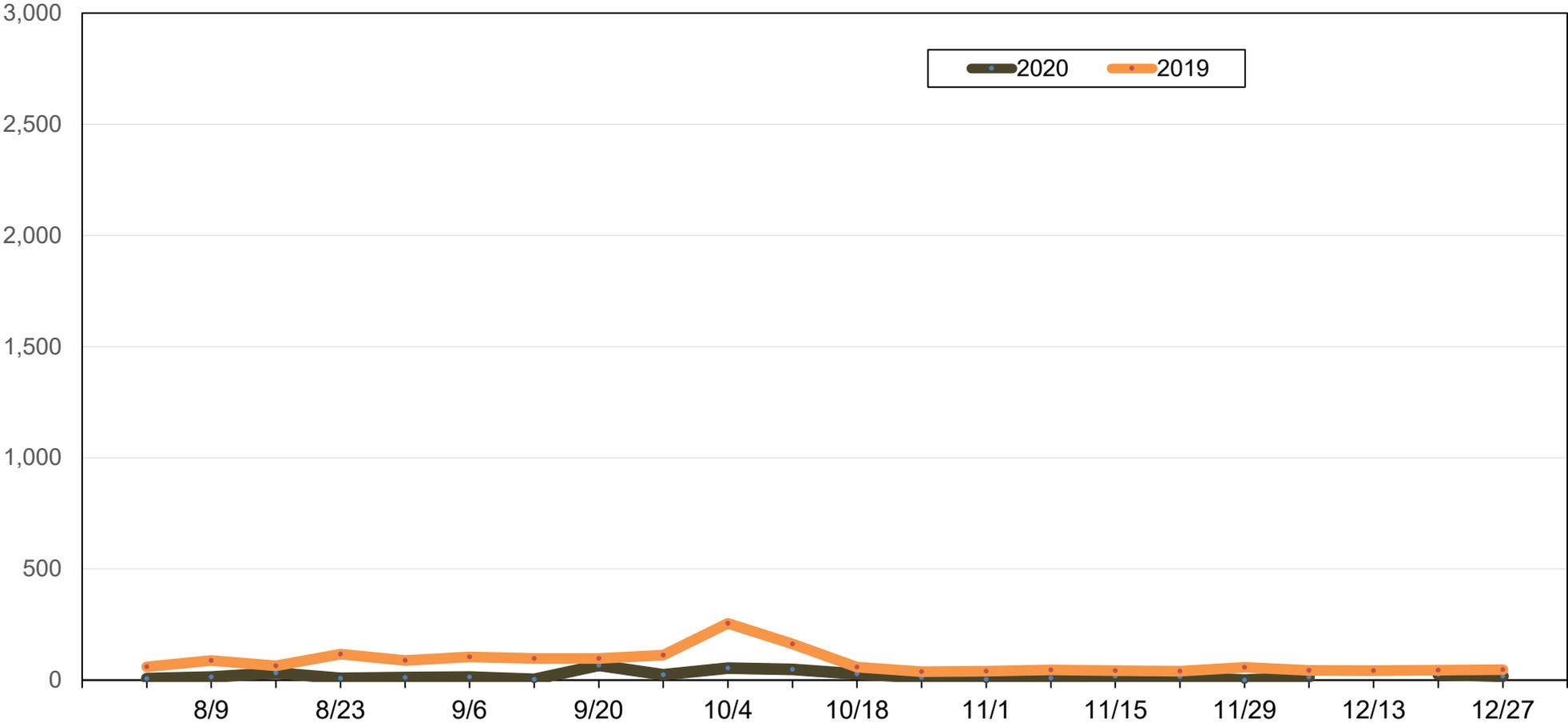
Travel Agency Weekly Bookings for Future Travel to Kaua'i as of July 21, 2020 Australia



Source: Global Agency Pro

Travel Agency Weekly Bookings for Future Travel to Hawai'i Island

Travel Agency Weekly Bookings for Future Travel to Hawai'i Island as of July 21, 2020 Australia



Source: Global Agency Pro



MAHALO!

HAWAII TOURISM

AUTHORITY



Agenda Item #3:

Report of the Hawai'i forward
looking bookings
YouGov

YouGov Destination Index Trends

July 19, 2020



YouGov Syndicated Survey

- HTA subscribes to YouGov's BrandIndex and Profiles databases for US, Japan, and Australia
- YouGov has a global consumer panel with over 6 million participants in 42 countries who take over 20 million surveys each year
- 10,000 consumers are surveyed each day
- HTA receives access to new data each week
- YouGov has daily brand tracking metrics – media-focused, brand health, purchase/intent, consumer status

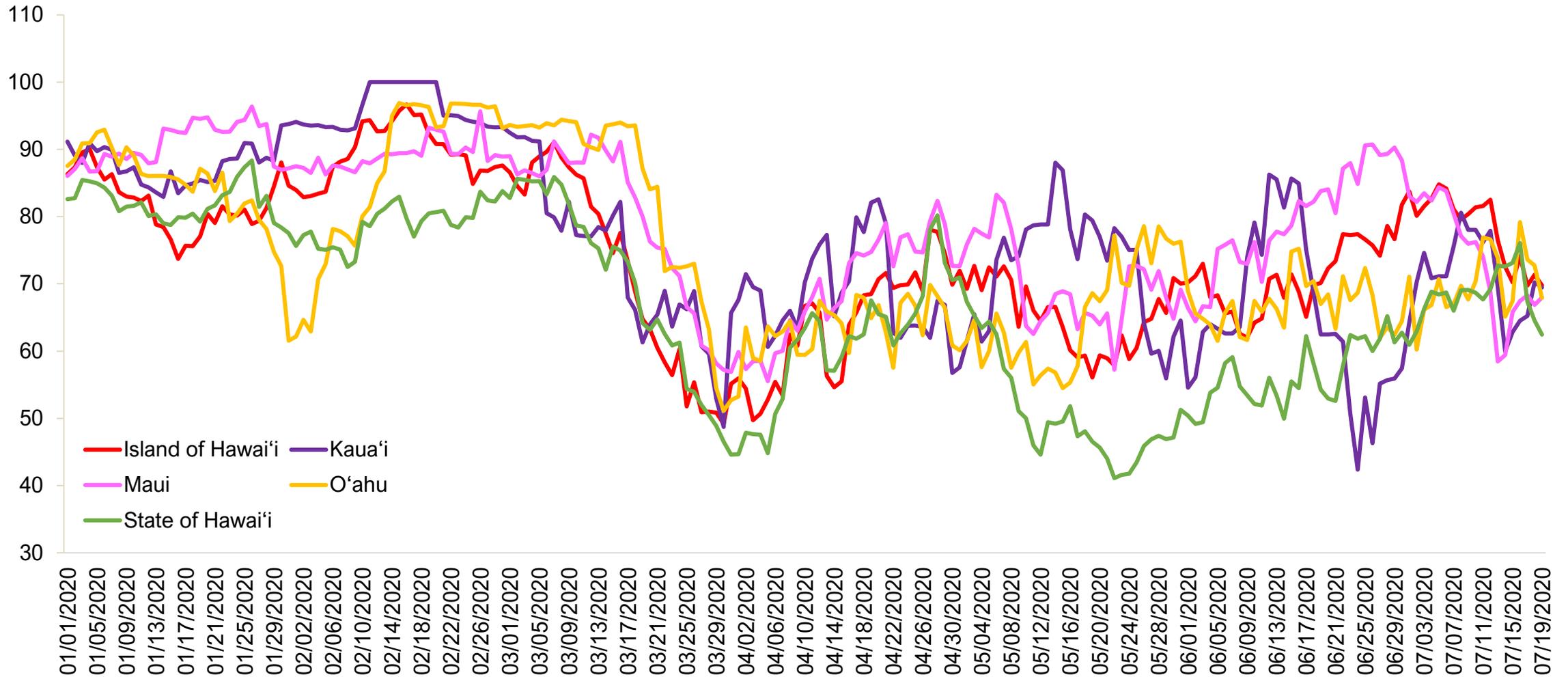
Destination Index

- Buzz
 - Net % of people that heard something positive about the brand in past two weeks minus % of people heard something negative about brand in past two weeks
- Recommend
 - Net % would recommend to others minus % would tell to avoid
- Word of Mouth Exposure
 - Yes% talked with someone about the brand (in-person, online or through social media)
- Consideration
 - Yes% would consider purchasing a brand when next in market

U.S. Destination Index Trends



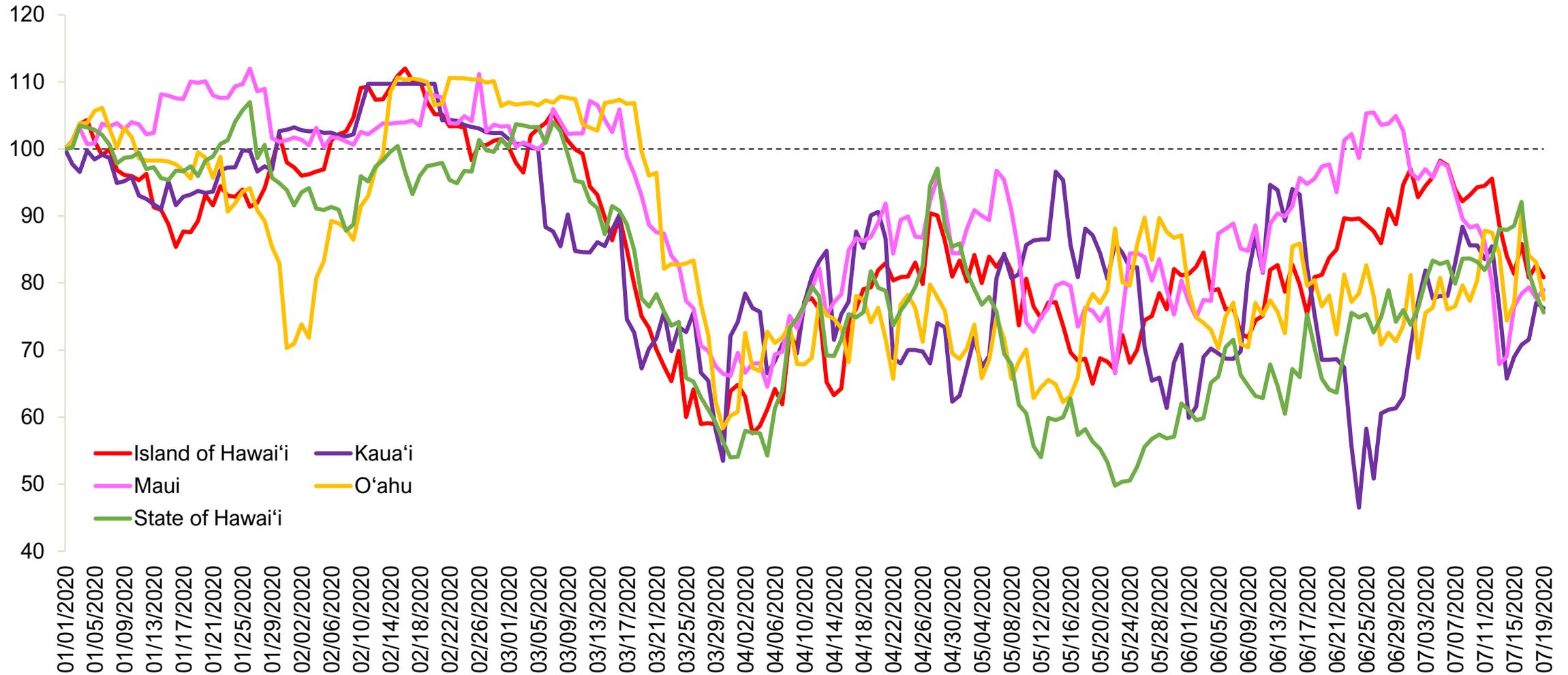
U.S. Buzz Net Score Two-Week Moving Average



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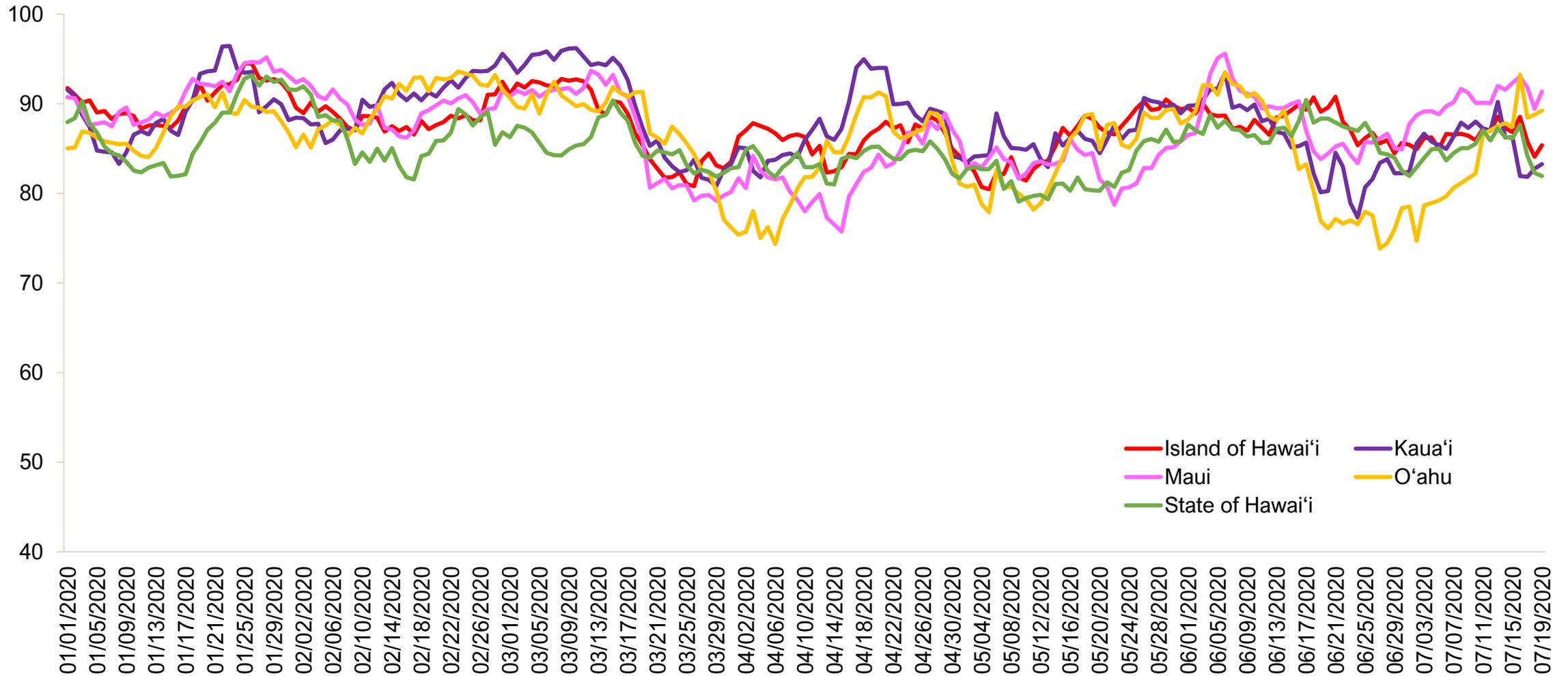
Source: YouGov data as of July 19, 2020

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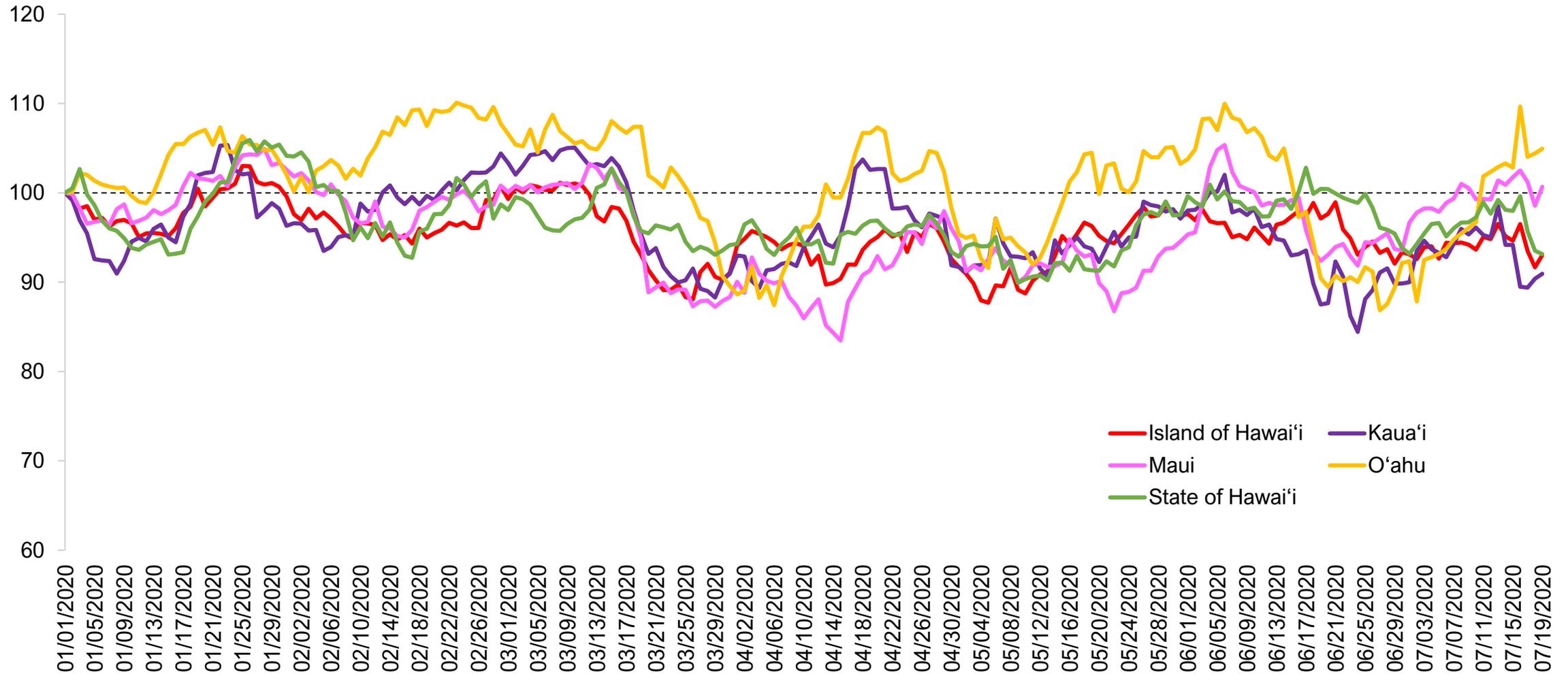
U.S. Recommend Net Score Two-Week Moving Average



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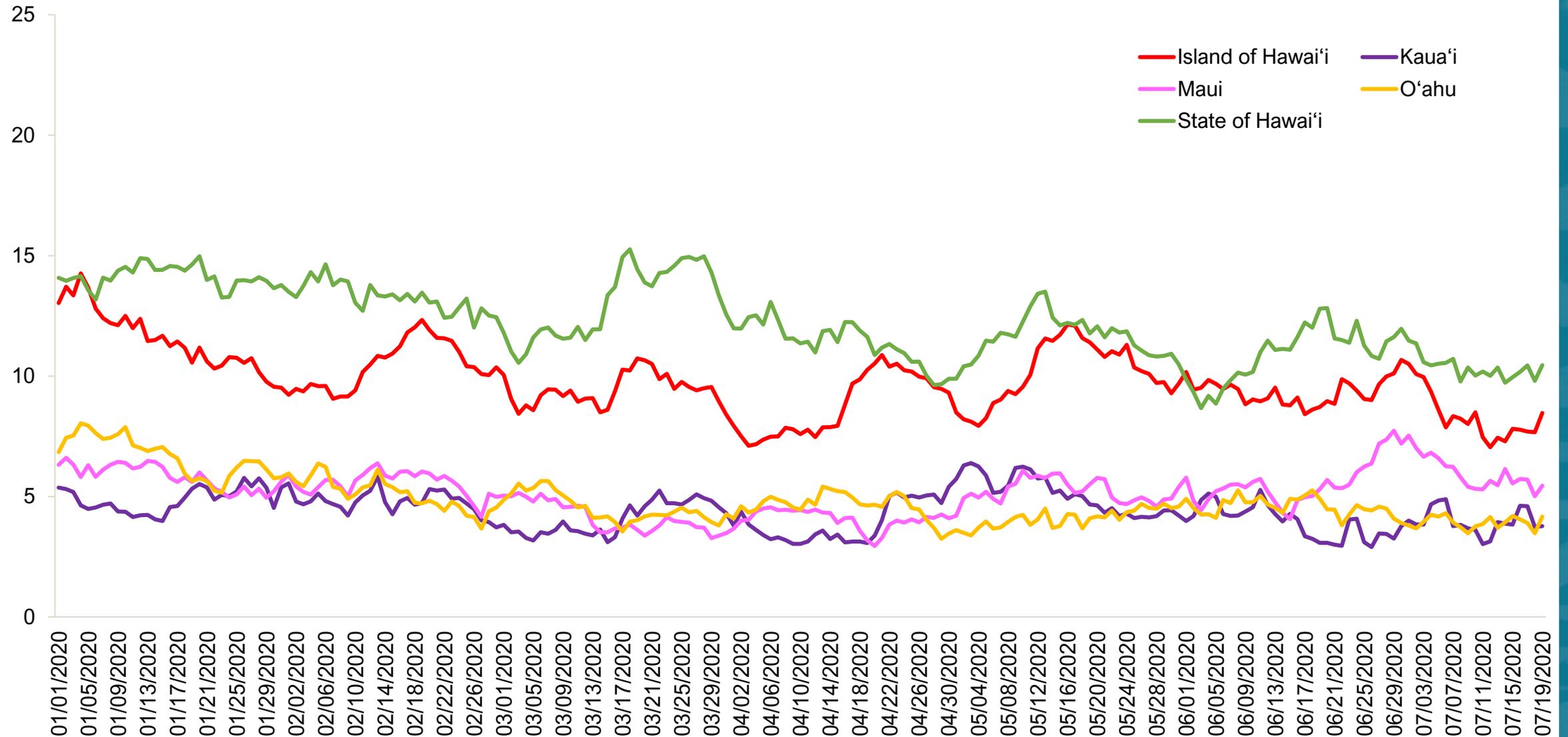
Source: YouGov data as of July 19, 2020

Index of U.S. Recommend Net Score Two-Week Moving Average



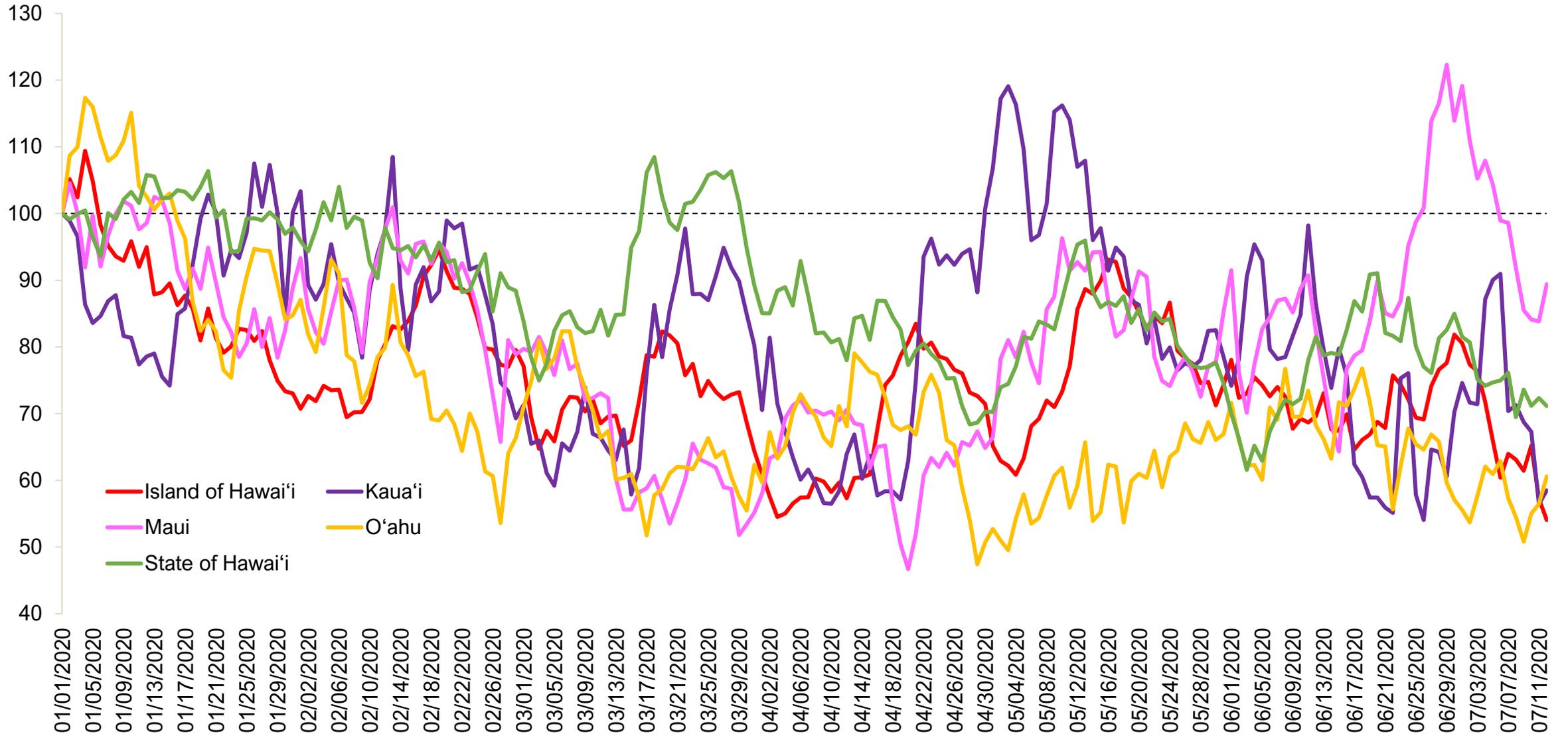
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U.S. Word of Mouth Exposure (% Yes) Two-Week Moving Average



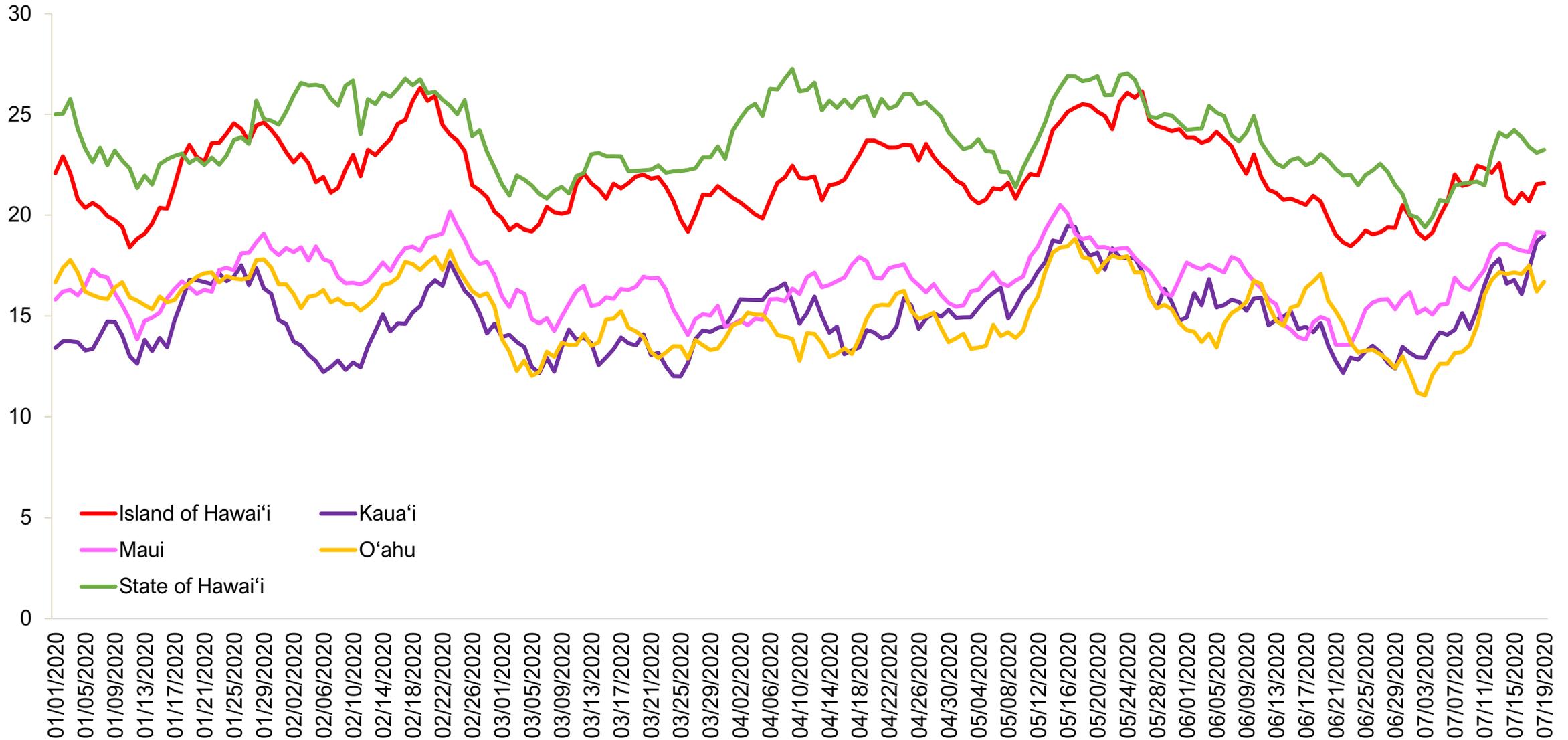
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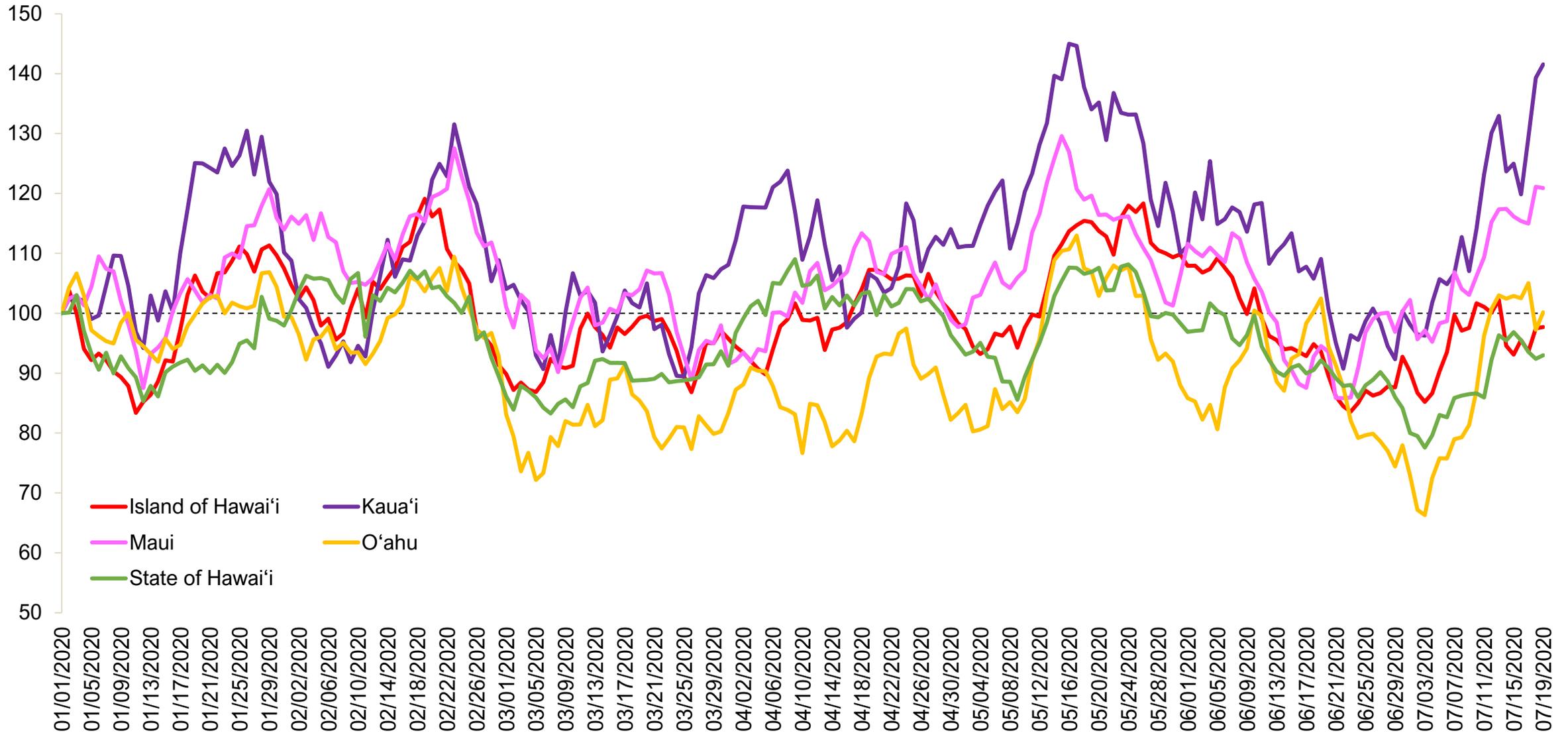
U.S. Consideration (% Yes) Two-Week Moving Average



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Source: YouGov data as of July 19, 2020

Index of U.S. Consideration (% Yes) Two-Week Moving Average

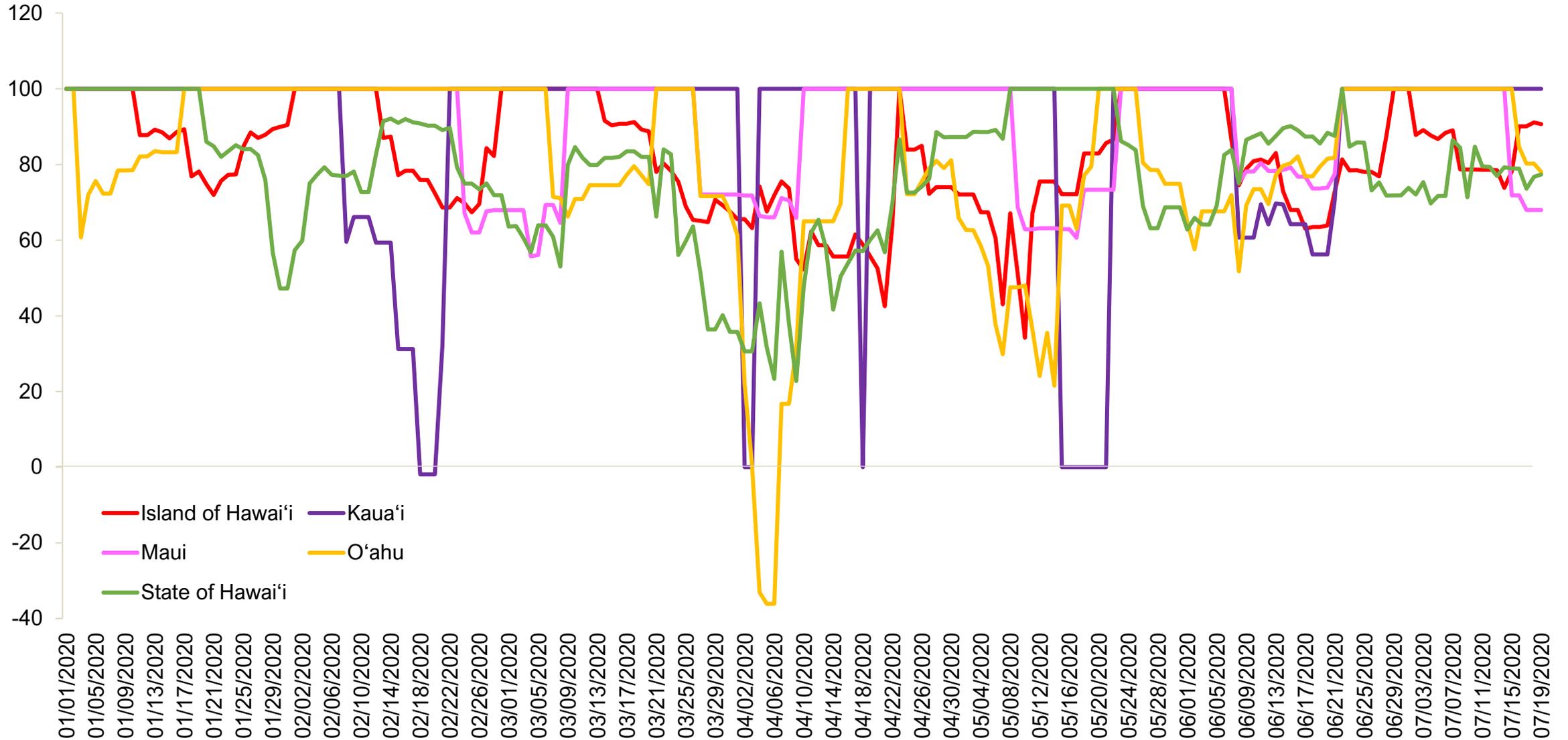


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Japan Destination Index Trends

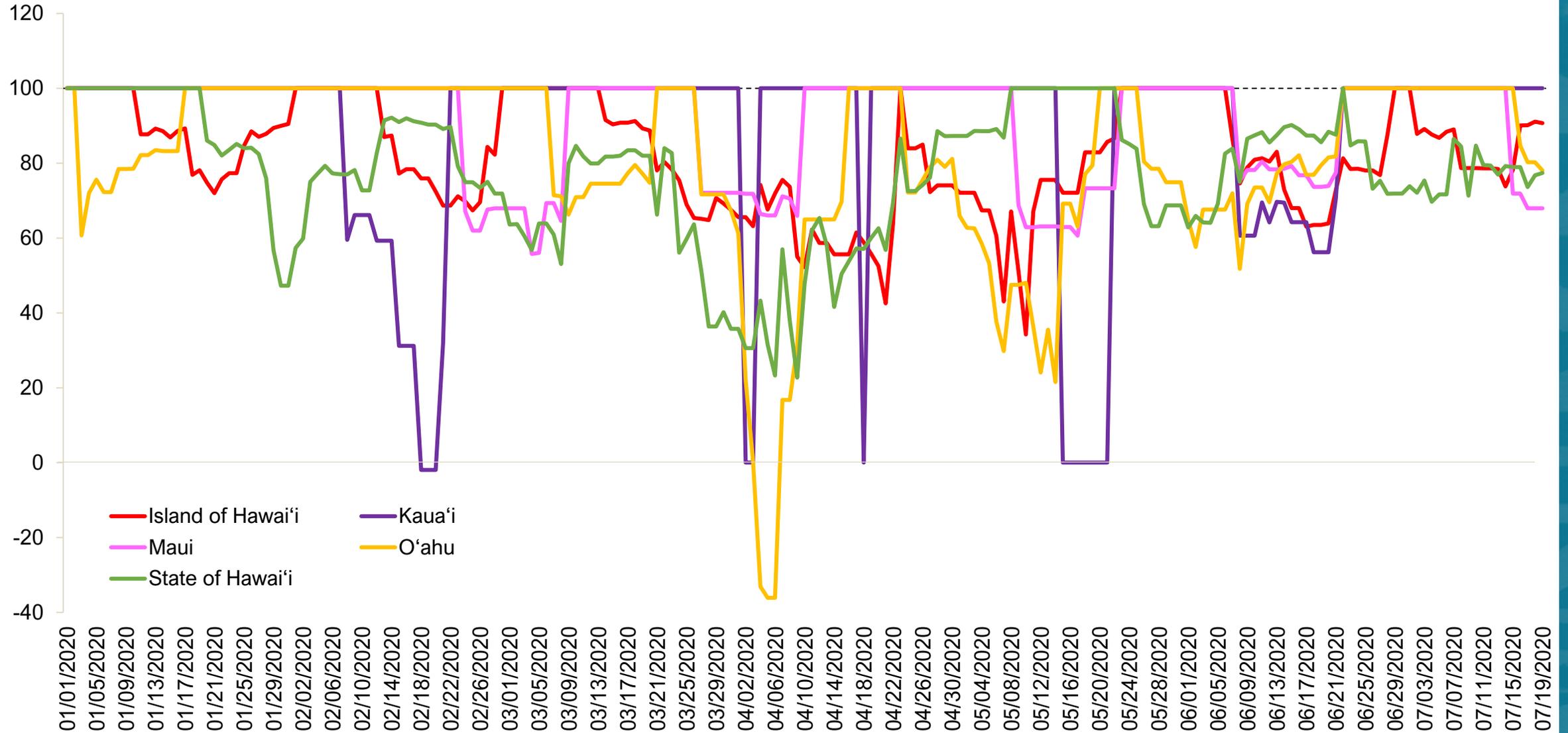
HAWAII TOURISM
AUTHORITY

Japan Buzz Net Score Two-Week Moving Average



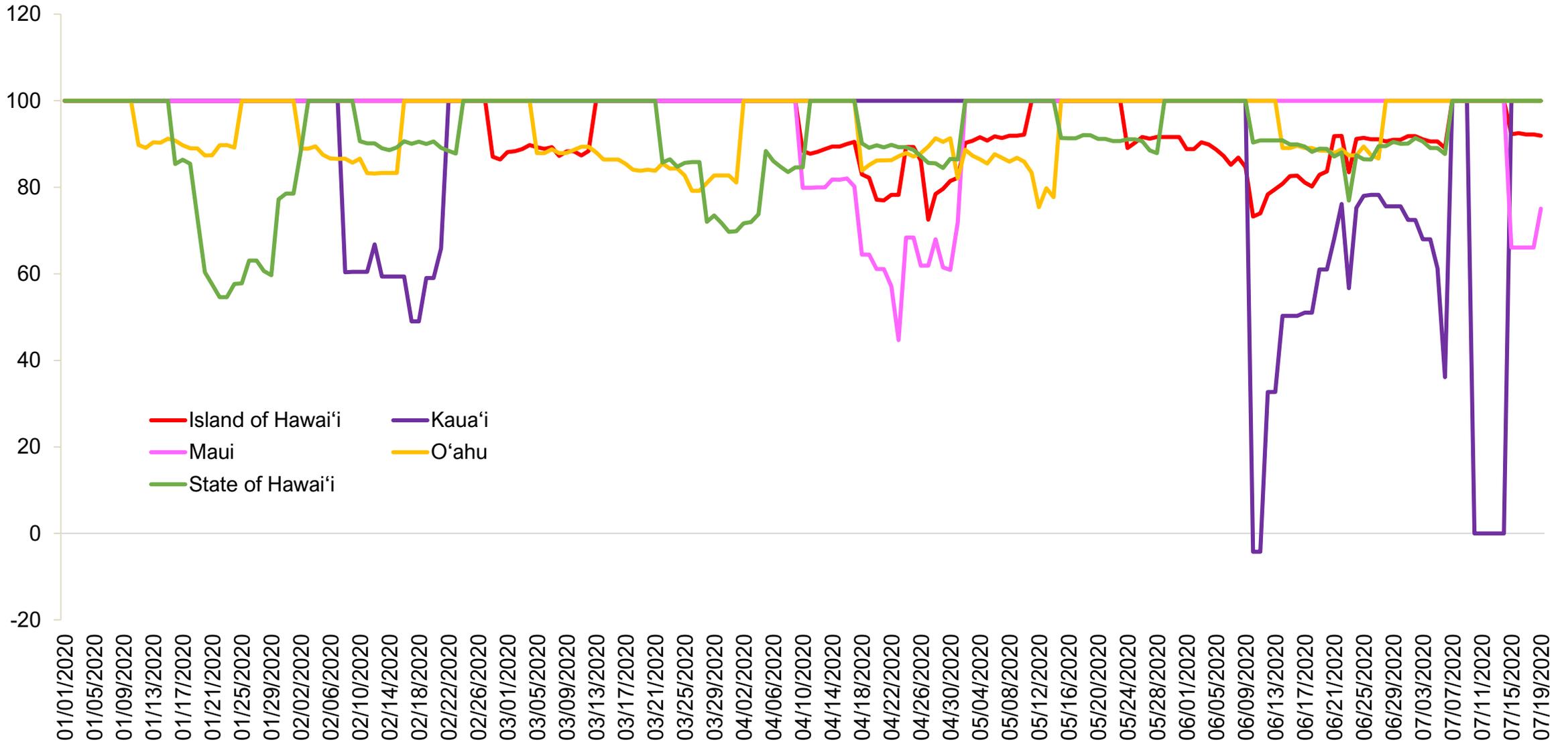
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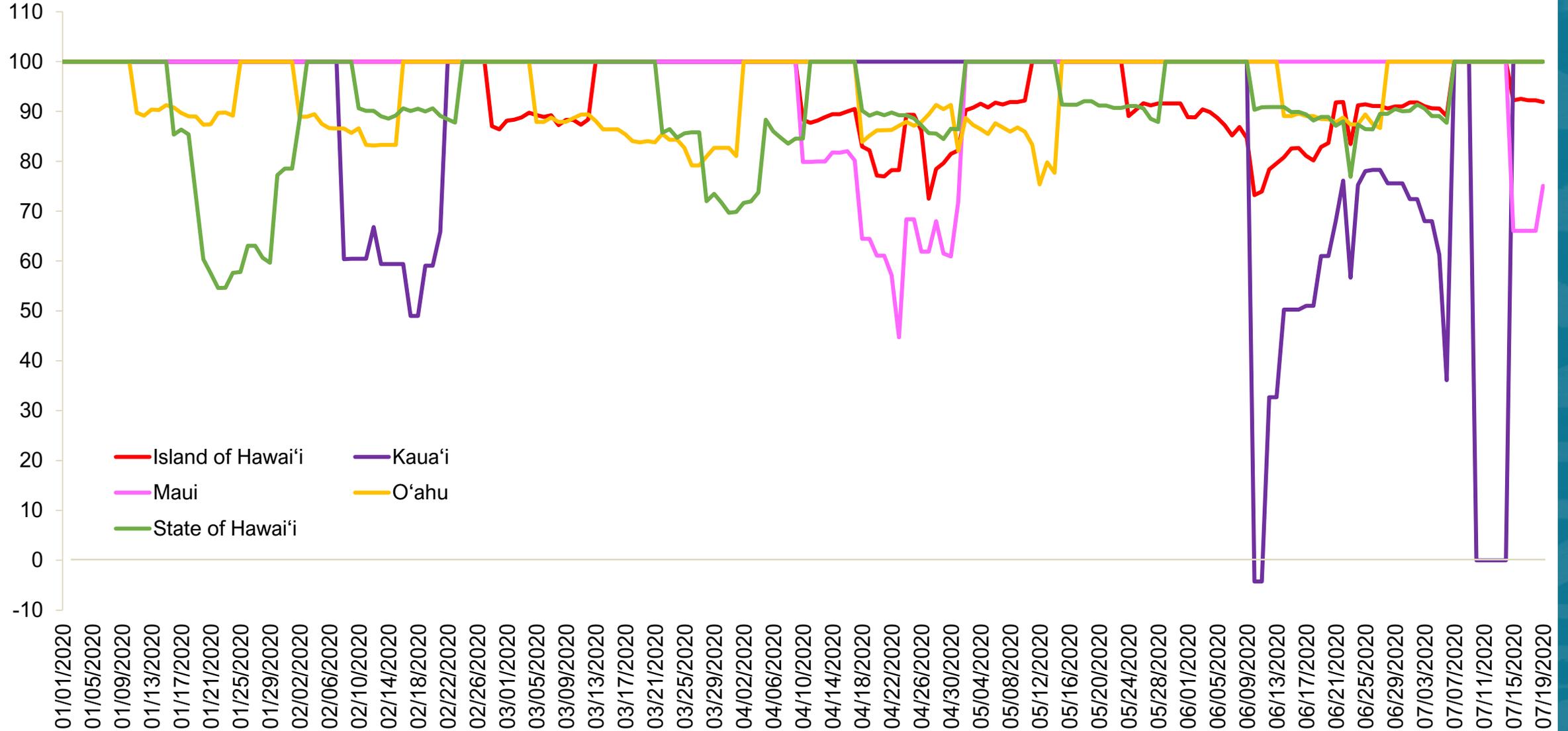
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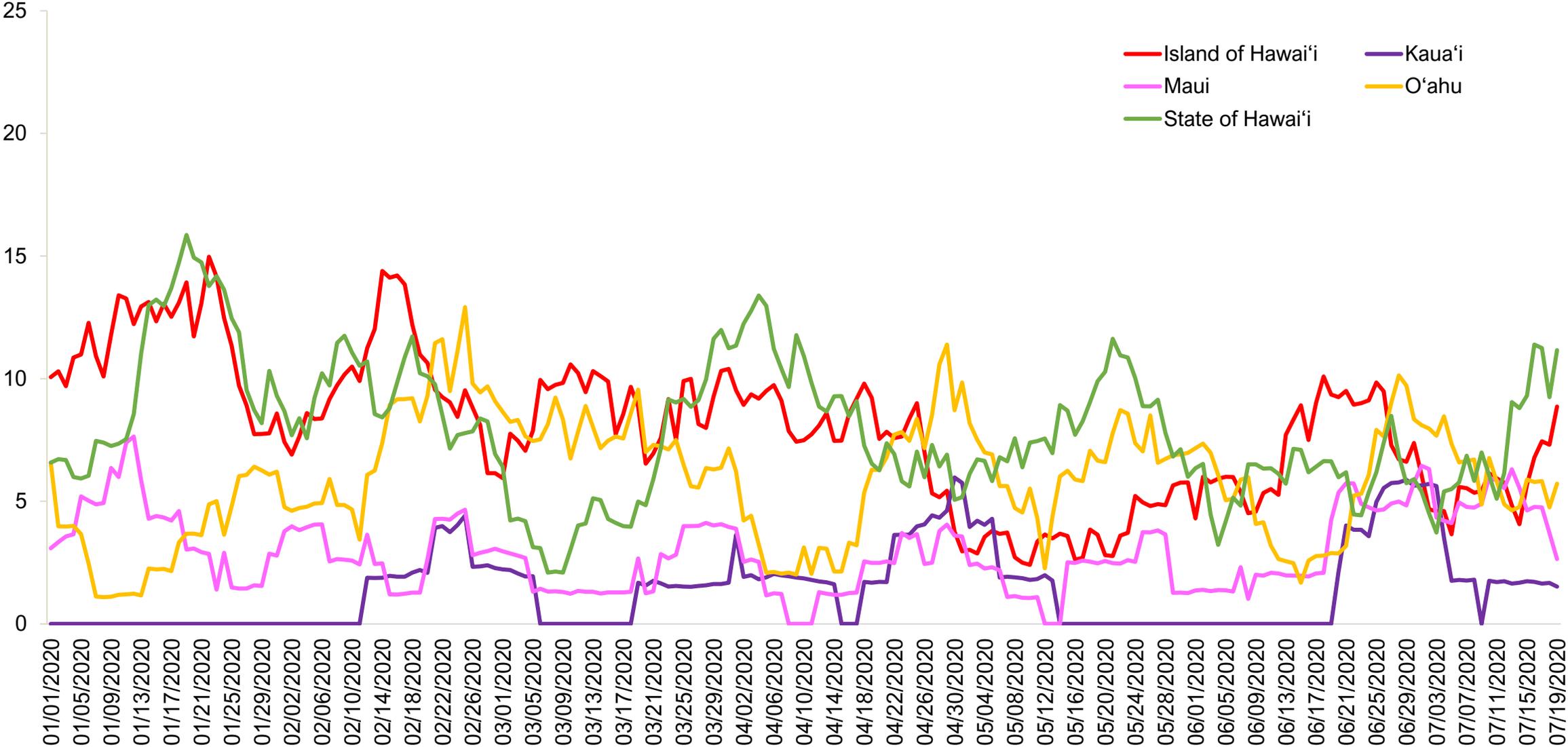
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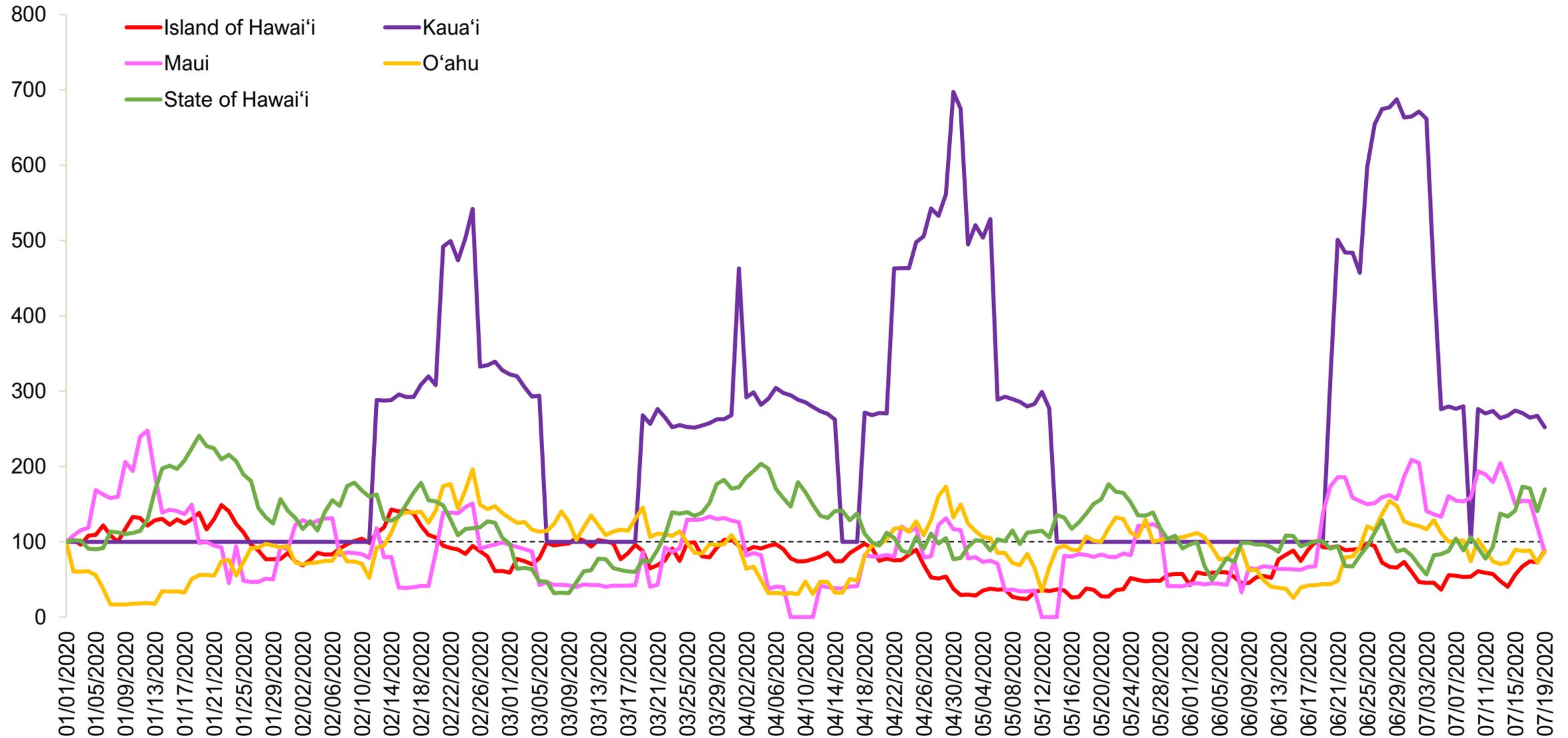
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Japan Word of Mouth Exposure (% Yes) Two-Week Moving Average



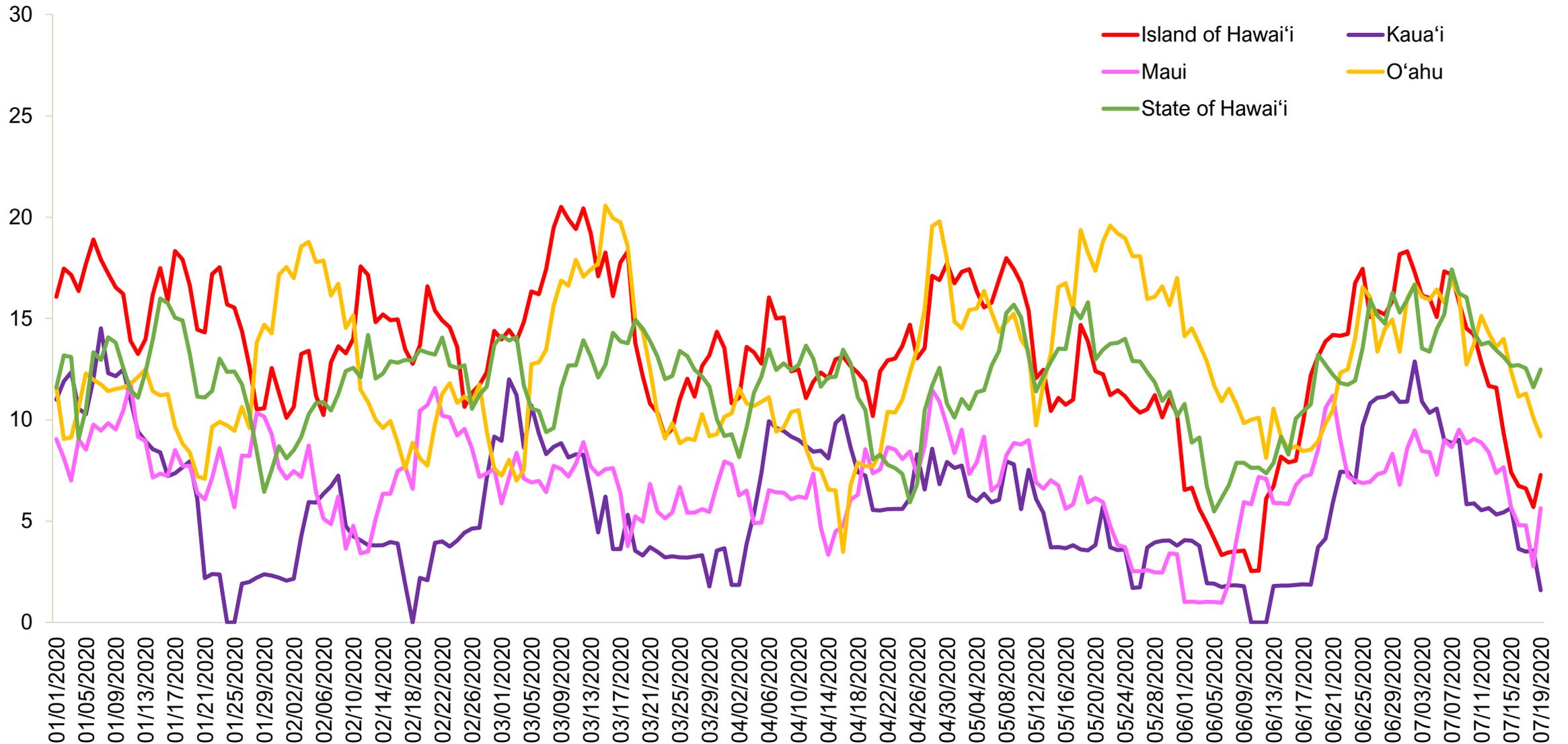
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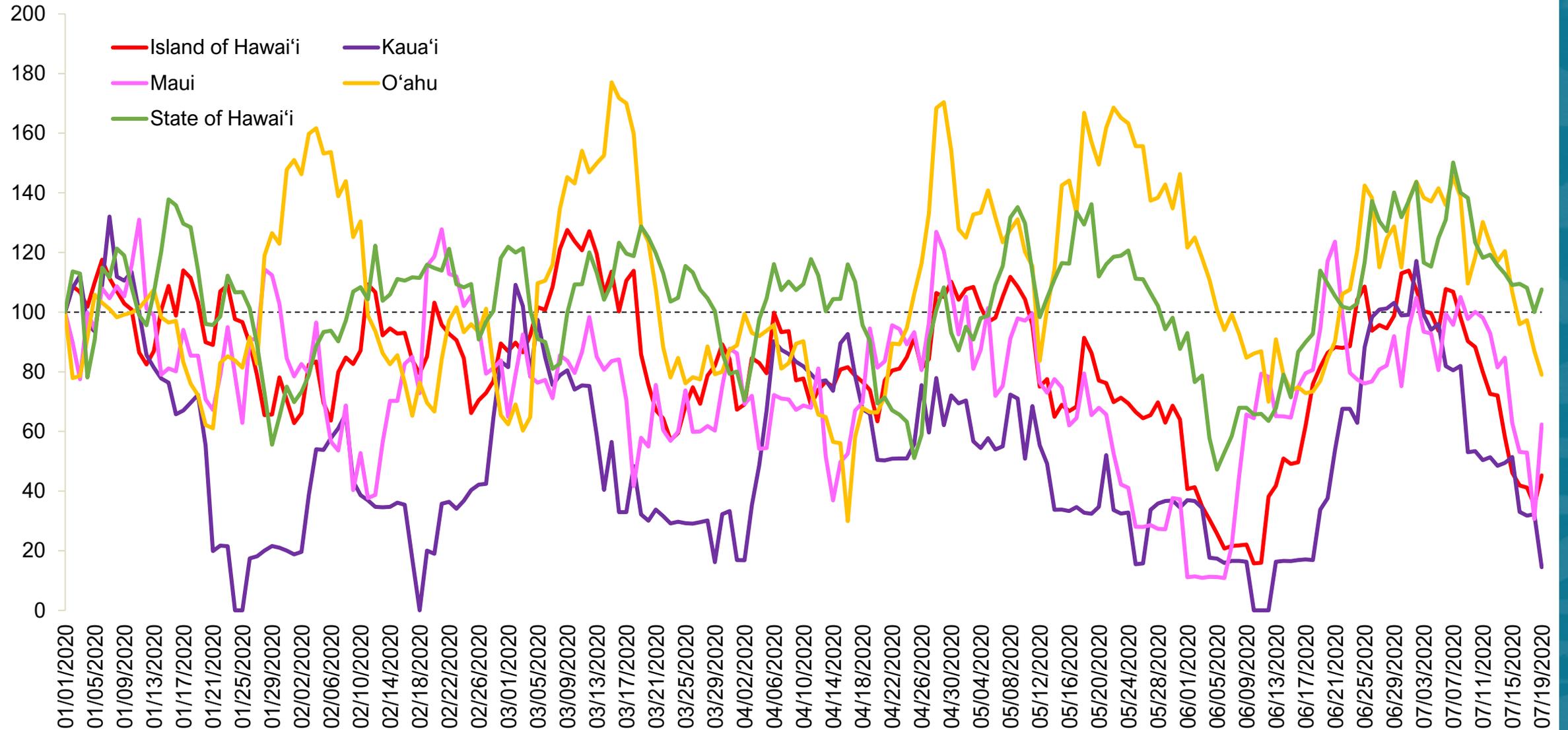
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Japan Consideration (% Yes) Two-Week Moving Average



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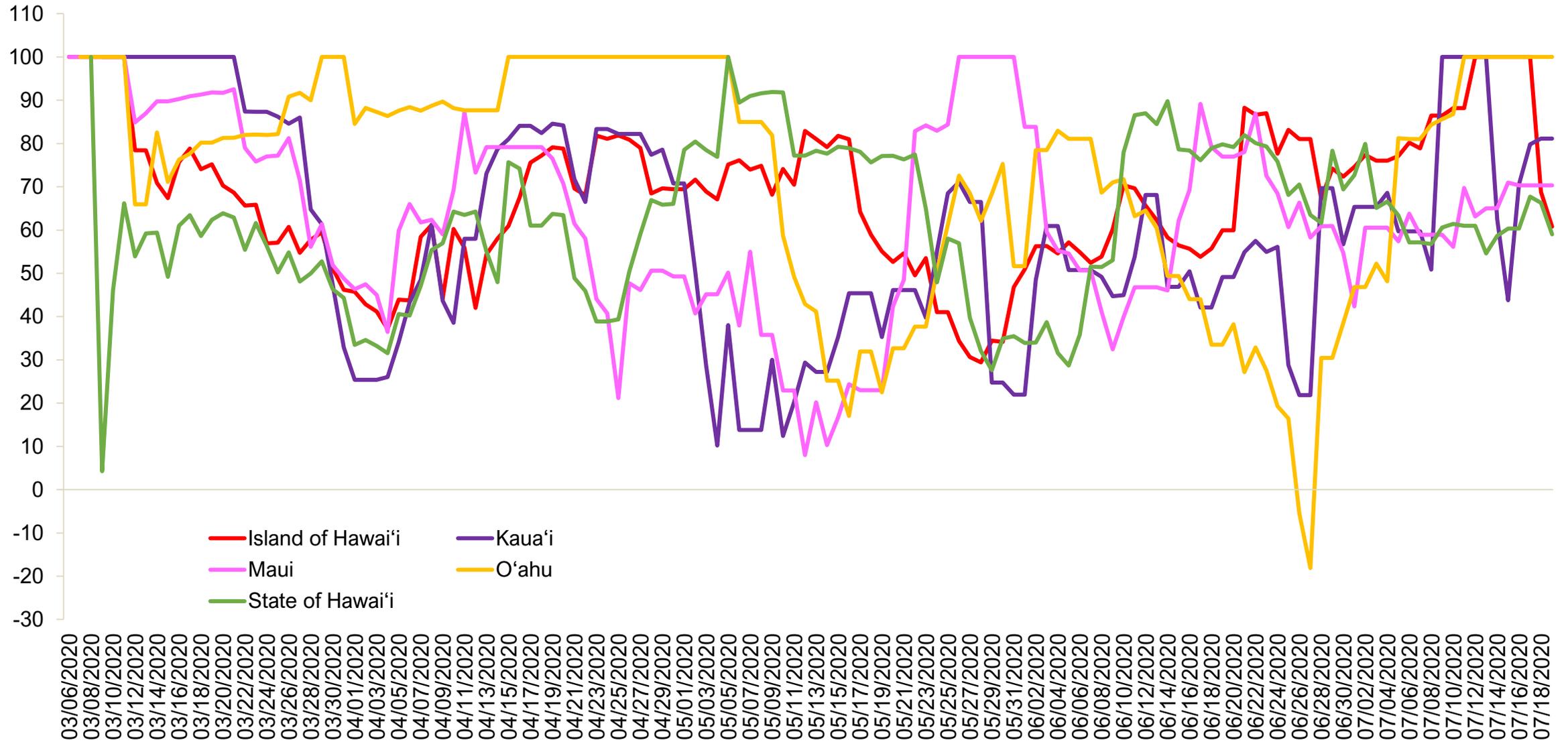


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Australia Destination Index Trends

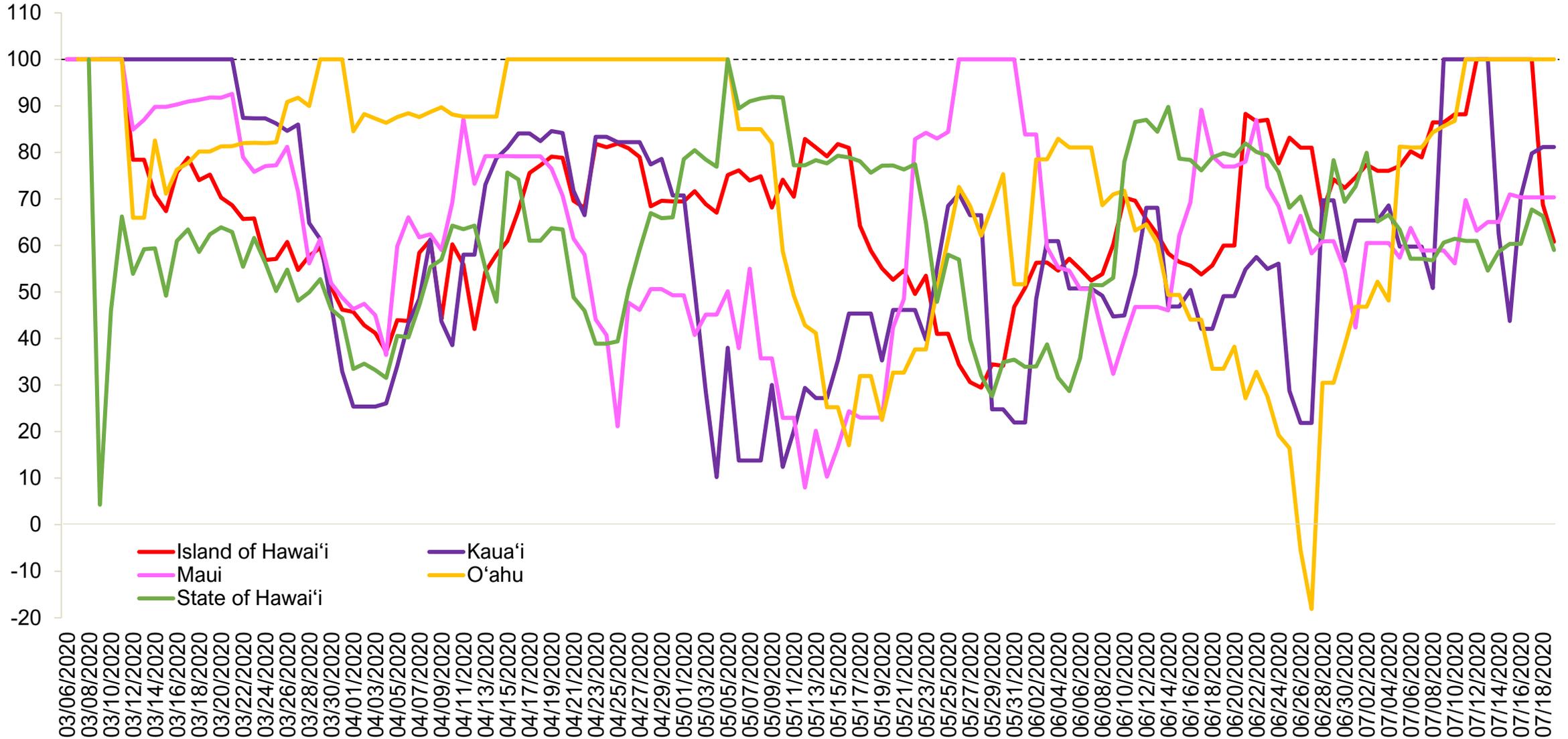


Australia Buzz Net Score Two-Week Moving Average



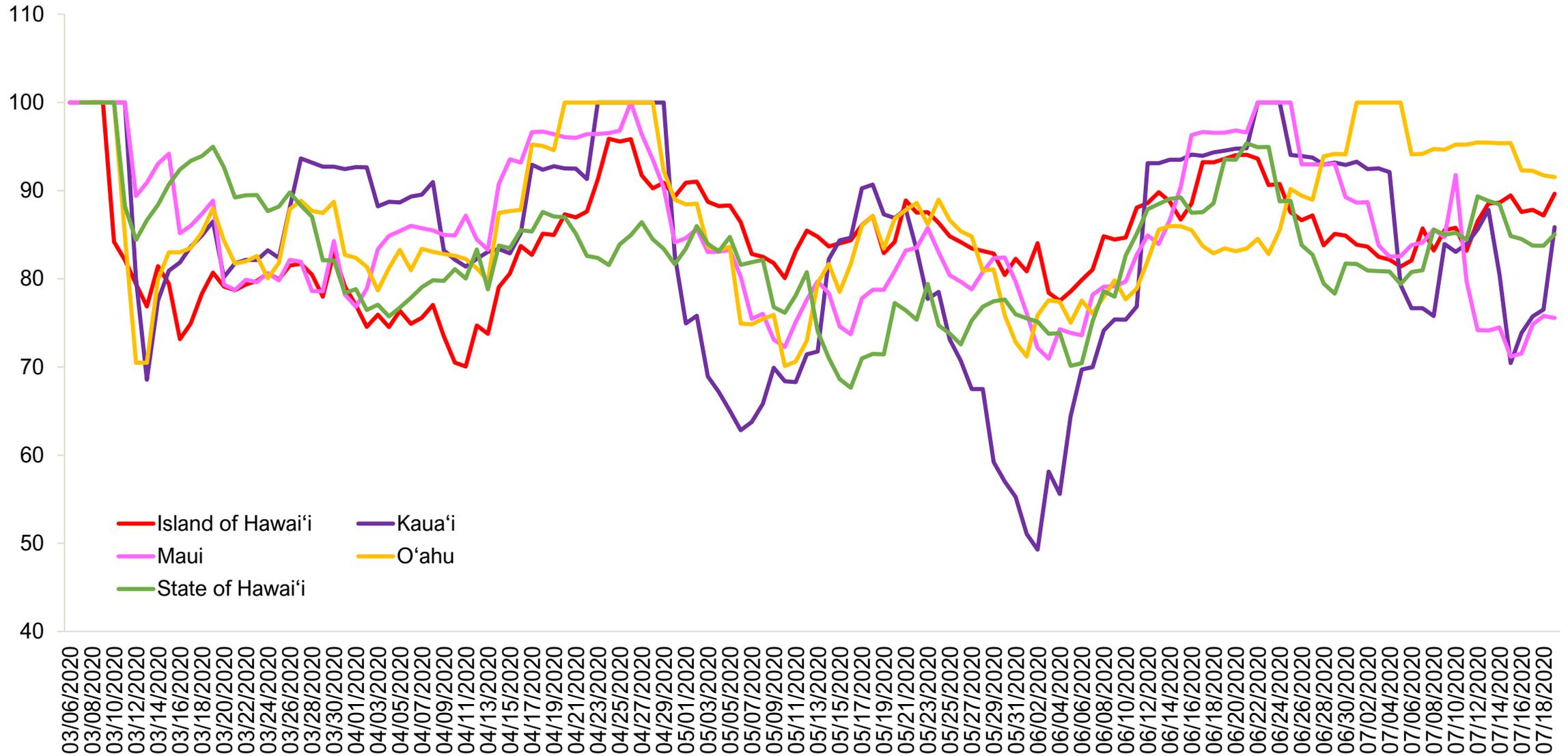
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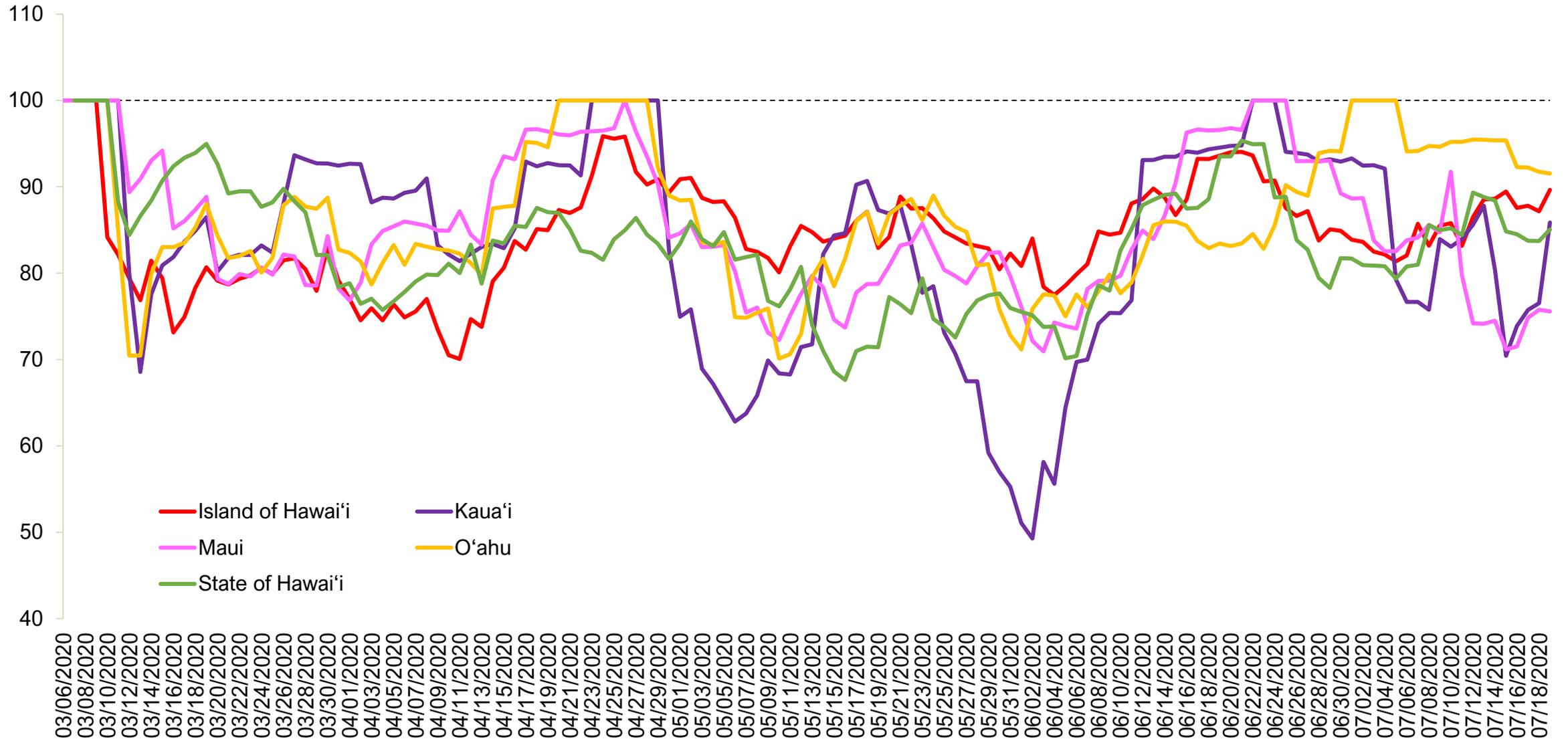
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Australia Recommend Net Score Two-Week Moving Average



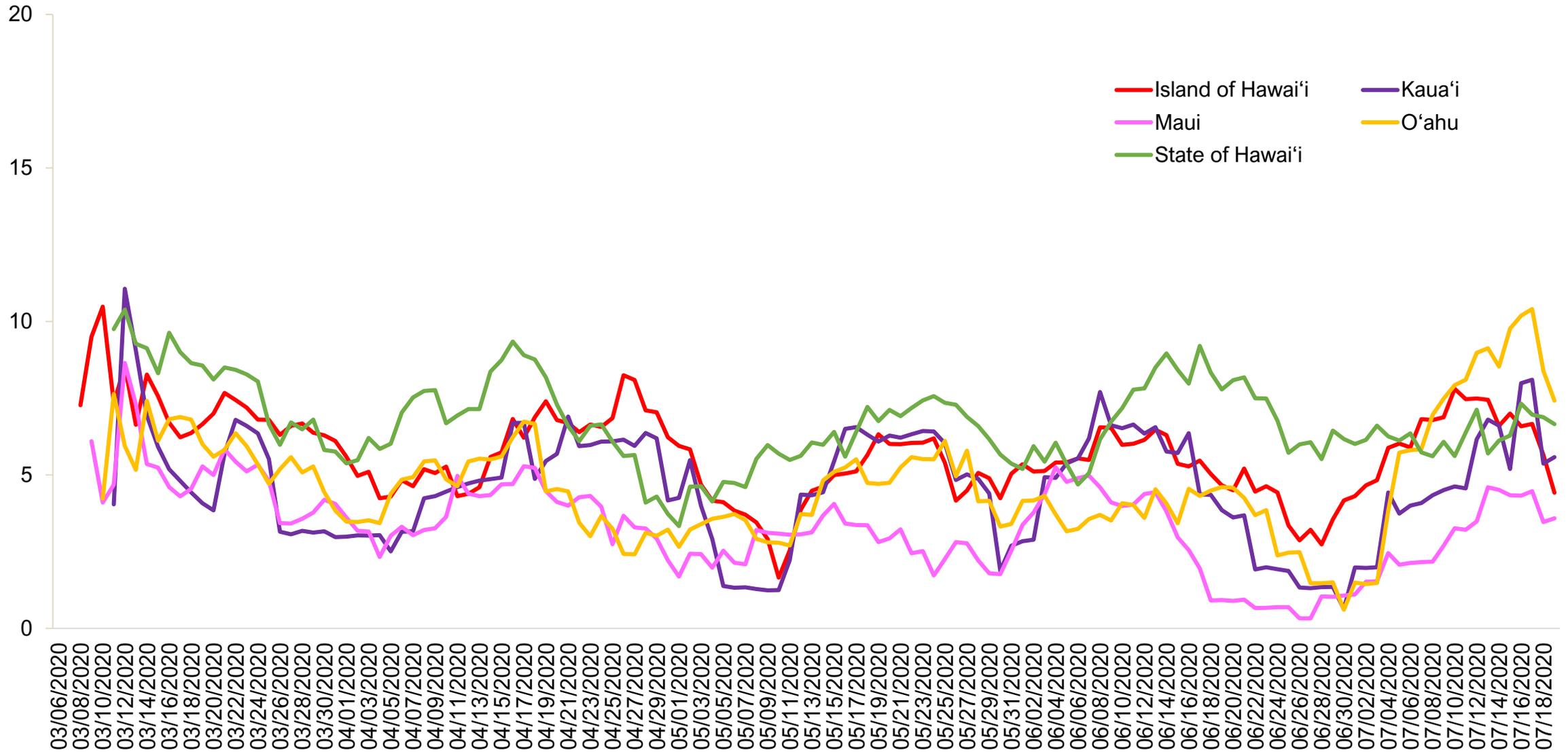
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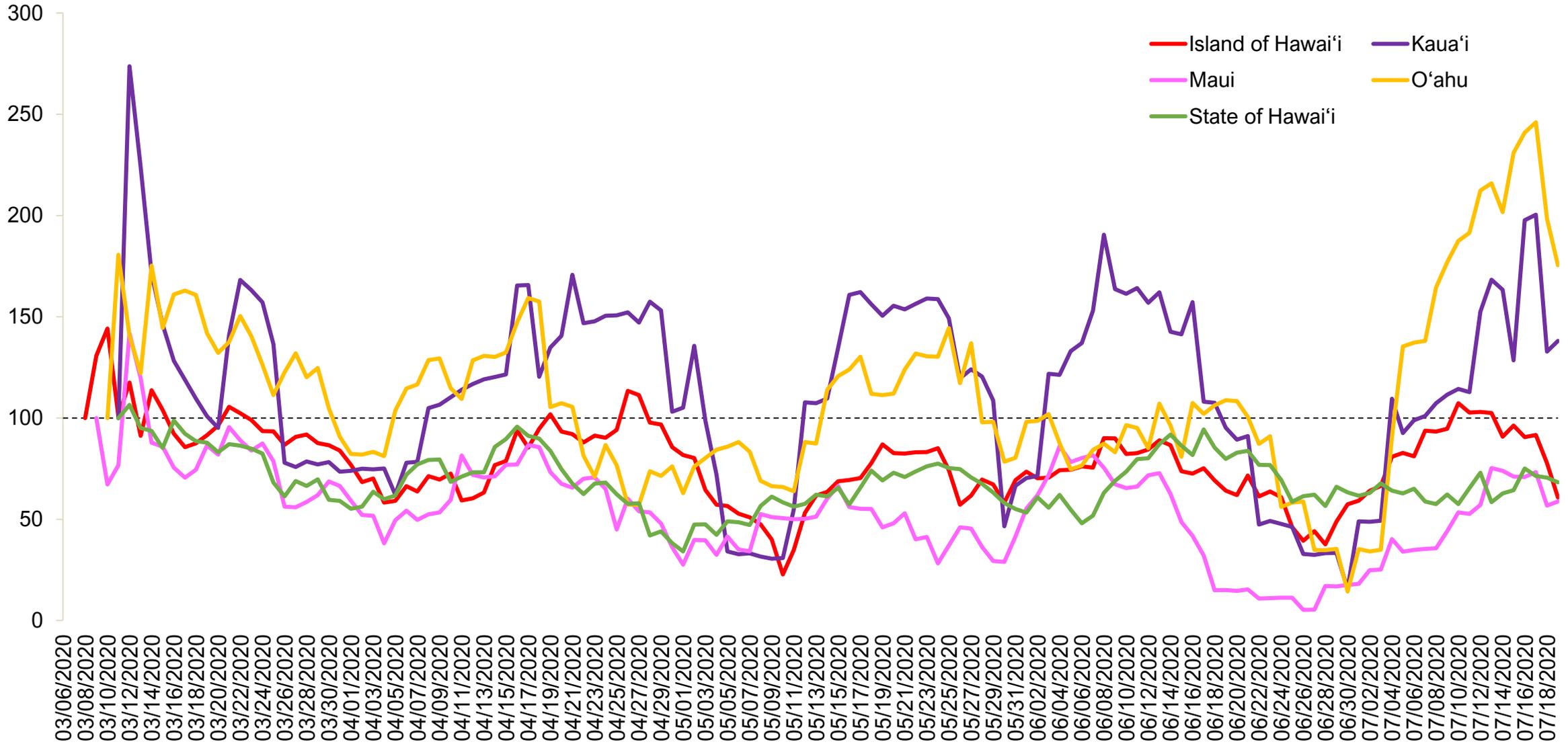
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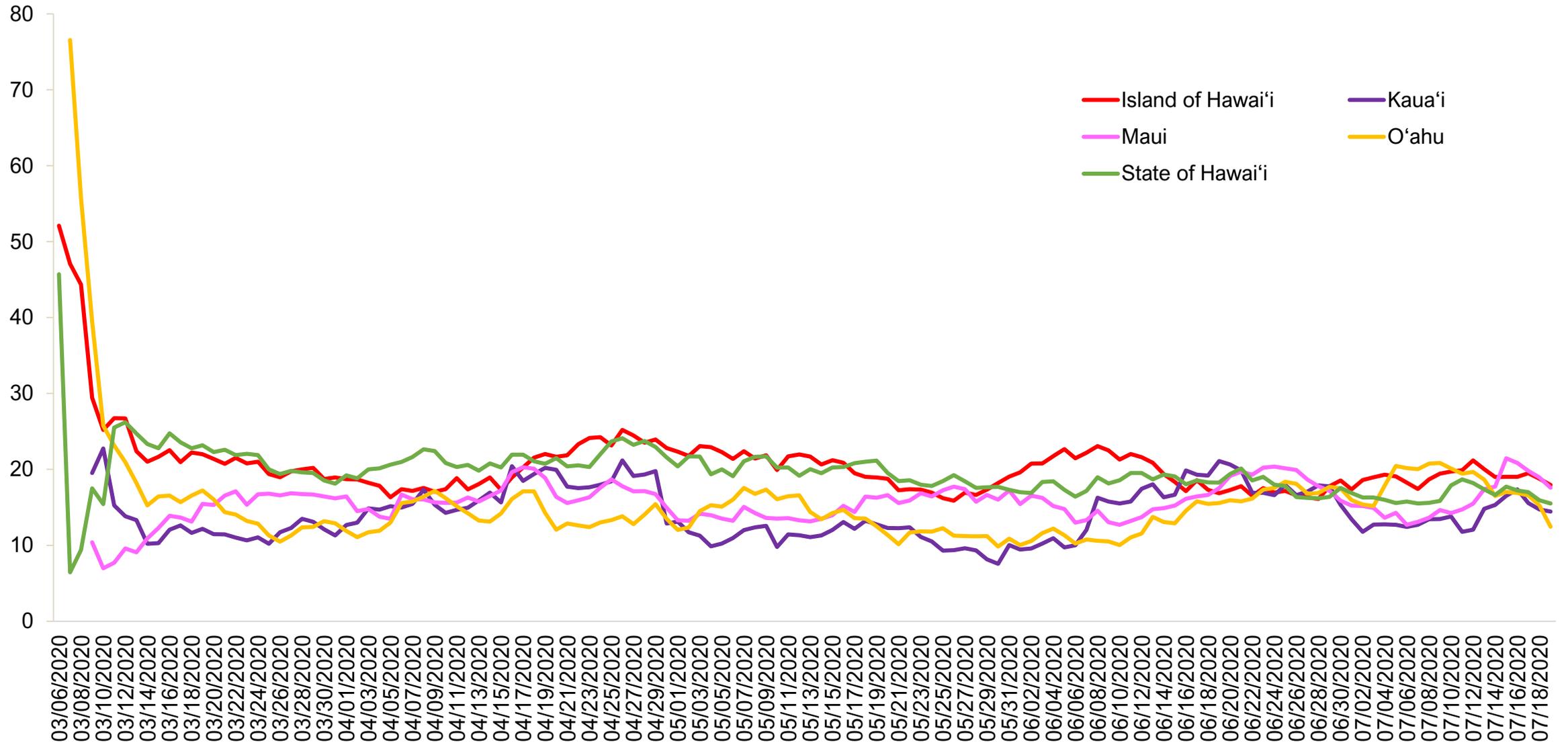
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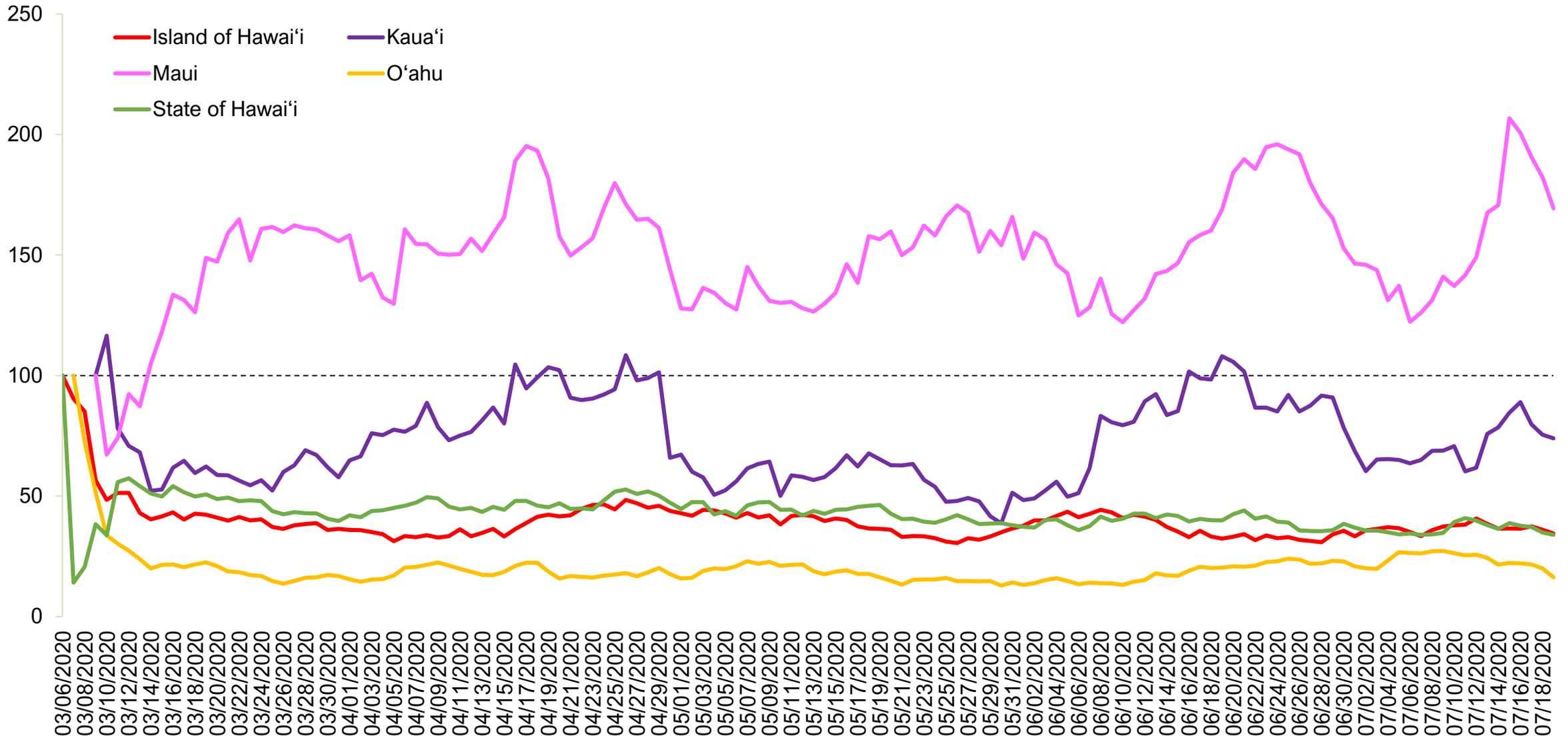
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Agenda Item #5:

Presentation of Hotel
Readiness for when Hawai'i
opens up to visitors



JULY 23, 2020

**WE ARE
READY DAY**

Outrigger Waikiki Beach Resort
'Alohilani Resort
Hilton Hawaiian Village



**HAWAI'I LODGING
& TOURISM**

A S S O C I A T I O N



HAWAII HIT: 55

The state sees its highest number of new cases and its 26th death since the pandemic's onset

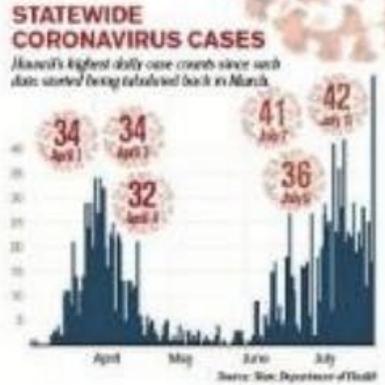
Hawaii recorded its highest daily number of coronavirus cases as Hurricane Douglas threatens to pummel the island chain.

"We're actually looking at the perfect storm, literally, where we have an increase (in cases) of COVID-19, we have a hurricane coming our way," Health Director Brian Anderson said Thursday at a COVID-19 briefing at the state Department of Health. "We need to be extra vigilant about not spreading the disease here and making things as safe as we possibly can

in the coming days and weeks. It's incumbent upon all of us to keep our community safe."

Health officials reported the death of a female Oahu senior who contracted the virus, becoming the state's 26th fatality, along with a record 55 new confirmed cases — the highest since the beginning of the pandemic. The previous record was 42 daily cases, reported July 11.

"One of the things that's remarkable about the cases is that they are representing a wide variety of different professions and activities ... which suggest we are seeing some



Please see CASES, A1



Hurricane Douglas barreling toward isles

By Nina Wu
nina.wu@staradvertiser.com

Get ready, Hawaii. That is the overarching message from state and county officials as Hurricane Douglas, which became a major Category 4 storm Thursday, continued strengthening on its path toward the Hawaiian Islands overnight.

At 5 p.m., Douglas was about 1,125 miles east-southeast of Hilo with maximum sustained winds of 130 mph and traveling west-northwest at 19 mph, according to the National Hurricane Center in Miami.

Douglas is forecast to be near hurricane strength when it approaches the isles Saturday night, the center said.

Forecasters from the National Weather Service

PREPARING TO WELCOME GUESTS



Hawaii hotels ready to return to life in a COVID-19 world

By Allison Schaefer
allison.schaefer@staradvertiser.com

Mask and temperature checks and social distancing, of course!

Visiting Hawaii hotels isn't a look-no-touch-experience anymore. At virtually every property, masked guests must now follow social distancing stickers before they're allowed to check in.

Hotel staffers are everywhere, and there are plenty of reminders that everyone — guests and

Please see DOUGLAS, A1

hosts alike — must stay vigilant about personal safety and hygiene practices.

The announcements of it all might cause some travelers to question whether

Please see HOTELS, A9



CORONAVIRUS COVERAGE

FOR THE LATEST UPDATES
Get free access at staradvertiser.com/coronavirus.



Delay sought
Teachers, principals and custodians are in favor of postponing the start of school because of virus concerns. B1



Trump cancels
Giving in to the pandemic, the president scraps plans for the Republican National Convention in Florida. A7

• Cases, worries soar at mid-level unions. A5

SPORTS
UH seeks options
The Rainbow football team is exploring different ways to recruit and train during pandemic. C1

THE CASES

1,083 IL POSITIVE CASES
As of July 23 at noon
New cases: 55

COUNTY	NEW CASES
Honolulu	50
Hawaii	3
Maui	2
Kauai	0
Oahu/State	0
TOTAL	1,490
Deaths	26
Hospitalization	155
Released from hospital**	1,125
Active cases ***	339

* Hawaii has 16 deaths diagnosed out of state.
** Includes intensive cases that were never fully hospitalized, exclusive of deaths.
*** Active cases are those still requiring medical care.
Source: State Department of Health

"Hawaii hotels ready to return to life in a COVID-19 world"

Honolulu Star-Advertiser July 24, 2020

"Members of the Hawaii Lodging & Tourism Association say they are ready to deliver. Three member hotels, including the Outrigger Waikiki, Alohilani Resort Waikiki Beach and Hilton Hawaiian Village Waikiki Beach Resort, opened their doors Thursday so city and state lawmakers could see what Hawaii's famous hospitality looks like in the COVID-19 era."

We Are Ready Day - Video Recap





“We’ve worked hard to adopt a standard for our industry that we vetted with the state Department of Health, Gov. David Ige and the four county mayors,” Hannemann said. “Now we see that individual brands are electing to do even more. We’ll hold more tours to show elected officials that we are making plans to reopen safely and to ensure guests that workers and guests are protected.”

-Mufi Hannemann

Hawai'i Lodging & Tourism Association

COVID-19 HEALTH, SAFETY, & SECURITY STANDARDS

MĀKAUKAU - (PREPARATION)

Preparations to resume business

HANA PONO - (PROPER PROCEDURE)

Standard Operating Procedures

PANE - (ANSWER)

Response to possible COVID-19 cases

HAWAII LODGING & TOURISM ASSOCIATION
COVID-19 HEALTH, SAFETY, & SECURITY STANDARDS
Updated: July 15, 2020

As we begin to transition into a period of recovery, Hawai'i's tourism industry is in the process of restoring the trust not just of potential visitors who will surely have concerns regarding hygiene and cleanliness practices, but also of our residents who must be assured that we are doing everything within our power to safeguard the men and women who make up the tourism sector's workforce. HLTA worked closely with industry stakeholders across the state and consulted with CDC, EPA, and OSHA guidance to develop the standards detailed below.

The following document has been vetted and approved by the Hawai'i State Department of Health.

These practices will focus on three key areas:

- Mākaukau (Preparation) - Preparations to resume business
- Hana Pono (Proper procedure) - When business resumes, standard operating procedures
- Pane (Answer) - Case-by-case response to possible instances of COVID-19

Additionally, HLTA supports the creation of a display or placard (similar to those awarded by the State DOH Food Safety Branch) for all hotels that have laid out, and put into practice, policies reflecting these best practices. This certificate should be awarded on a pass/fail basis only to properties that have clearly met the standards below.

Note: Employers should make sure that all employees are abiding by current federal and State guidelines regarding the use of PPE (ie: masks, gloves, etc.).

MĀKAUKAU (Preparation)

Prior to resuming business operations, the following policies should be installed:

- **Establishment of clear, non-punitive employee health guidance**
 - These policies should set forth clear standards that advise employees to remain home if they are sick
 - The responsibility to report illness should fall to the employee, not management
 - If an employee is sick, they should follow CDC guidelines (<https://www.cdc.gov/coronavirus/2019-ncov/if-you-are-sick/steps-when-sick.html>)
 - Stay home
 - Self-isolate in the home
 - Rest, hydrate, and take OTC medications
 - Contact a doctor if shortness of breath is apparent
 - Monitor all symptoms to report to personal physician
 - Make sure to call doctor before seeking medical care
 - Employees should remain home if:
 - They have a temperature greater than 100.4°F
 - They have COVID-19-like symptoms



Mākaukau

- Establishment of non-punitive employee health guidance
 - These policies should set forth clear standards that encourage employees to remain home if they are sick
- Mandatory training programs covering the following topics should be made available for employees
- Establishment of social distancing standards
 - Key areas include:
 - Valet, front desk, common areas, elevator banks, F&B areas, gym, spa, and pool areas

Hana Pono

- Establishment and display comprehensive sanitizing practices for all common areas, guest rooms, and staff areas
 - Lodging properties should refer to the CDC and EPA for cleaning standards and approved cleaning products
- Close attention should be paid to high frequency contact areas



Pane

Upon arrival at a Hawai'i hotel, travelers will fall under two categories: those who have provided negative test results, and those who must be quarantined. Guests who cannot provide evidence of a negative COVID-19 test, or who are awaiting test results and must be quarantined can expect the following:

- The guest will receive a single-use room key
- The guest will remain quarantine until their negative test results arrive, or 14 days elapses
- If the guest violates quarantine, local law enforcement will be notified



Pane

If a guest falls ill while staying at hotel in Hawai'i:

- The guest will be isolated at the hotel where they are staying
- The hotel will establish internal policy that will dictate and area of the hotel to be set aside should this occur
- The guest will not be asked to leave the hotel unless it has been determined that they must be admitted to the hospital
- Hotels will also accommodate the DOH with any contact tracing efforts





Restoring Trust

It is highly important that the impetus for these standards is clearly communicated to employees throughout any organization. This new normal is being established to restore trust in our industry and to allay any concerns that may exist. In this vein, it is critical that we continue to treat all of our guests with aloha, none more so than those who may have unknowingly contracted a virus. These practices are not meant to ostracize or vilify individuals, but rather protect all of us from another public health emergency.

Agenda Item #6:

Presentation of Wholesale /
Travel Agent Readiness for
when Hawai'i opens up to
visitors.



Hawaii Tourism Authority Pleasant Holidays

Marketing Standing Committee
Meeting
July 29, 2020

Pleasant Holidays – Company Overview

Experience & Expertise

- Founded in 1959 – over 10 million travelers served
- Headquartered in Westlake Village, CA (Los Angeles)
 - Additional offices in San Diego, CA and Honolulu, HI
- Number One U.S. Tour Operator to Hawaiian Islands
- Voted “Best Tour Operator Hawaii” 16 consecutive years (2004-2019)

Destination Portfolio

- Hawaii, Mexico, Central & South America, Caribbean, Tahiti, Fiji, Cook Islands, Europe, Asia & Japan, Australia, New Zealand, UAE, US & Canada and Cruises (Ocean & River)

Subsidiary of the Automobile Club of Southern California (AAA)

- Multi-Billion Dollar Insurance, Financial & Travel Services Company
- 16.1 Million AAA Members Nationwide & 932 Retail Travel Agents

Financial Stability

- Vacation protection under USTOA \$1 Million Travelers Assistance Program

**Pleasant
Holidays**®

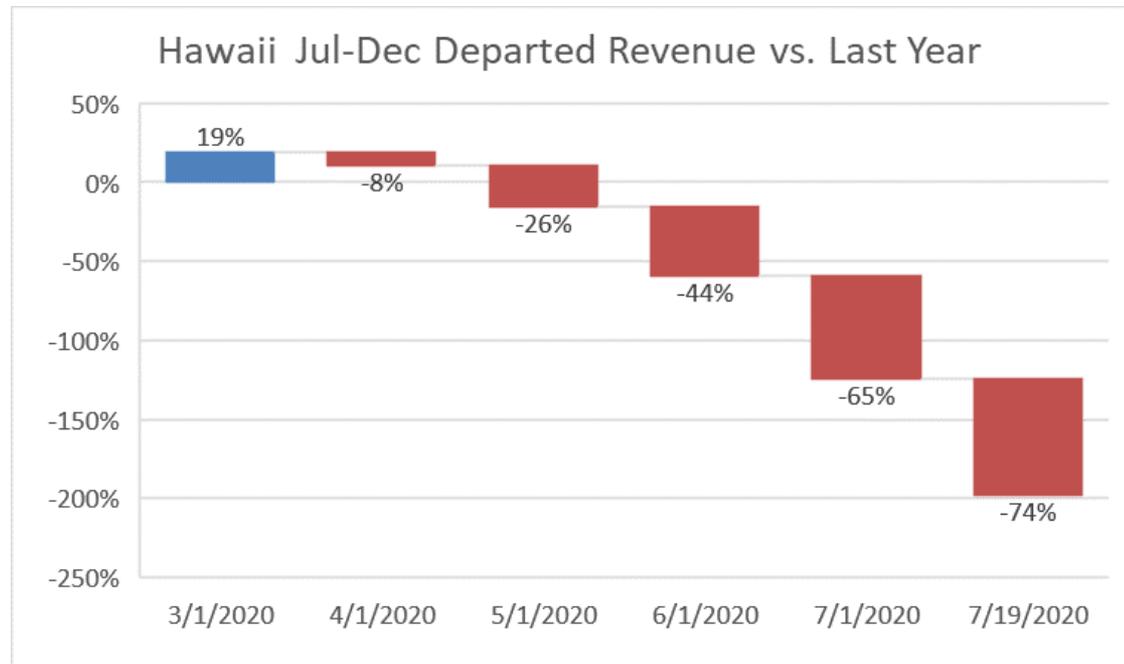
TIMELINE

- March 14 CLIA suspends cruise ship operations
- March 17 Governor Ige encourages visitors to postpone vacation plans for 30+ days
- March 21 Governor Ige mandates 14-day quarantine for all returning residents and visitors arriving to the State of Hawaii
- April 09 Cruise ship suspensions extended through July 24
- May 18 Governor Ige extends 14-day quarantine through July 30
- June 19 Cruise ship suspensions extended through September 15, 2020
- June 24 Governor Ige issues mandate for a negative COVID-19 test w/in 72-Hours of arrival OR 14-day quarantine, through August 31, 2020
- July 09 Governor Ige extends 14-day quarantine through August 31, 2020
- July 16 Cruise ship suspensions extended through September 30, 2020

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Holidays**®

Pre COVID-19 Outlook

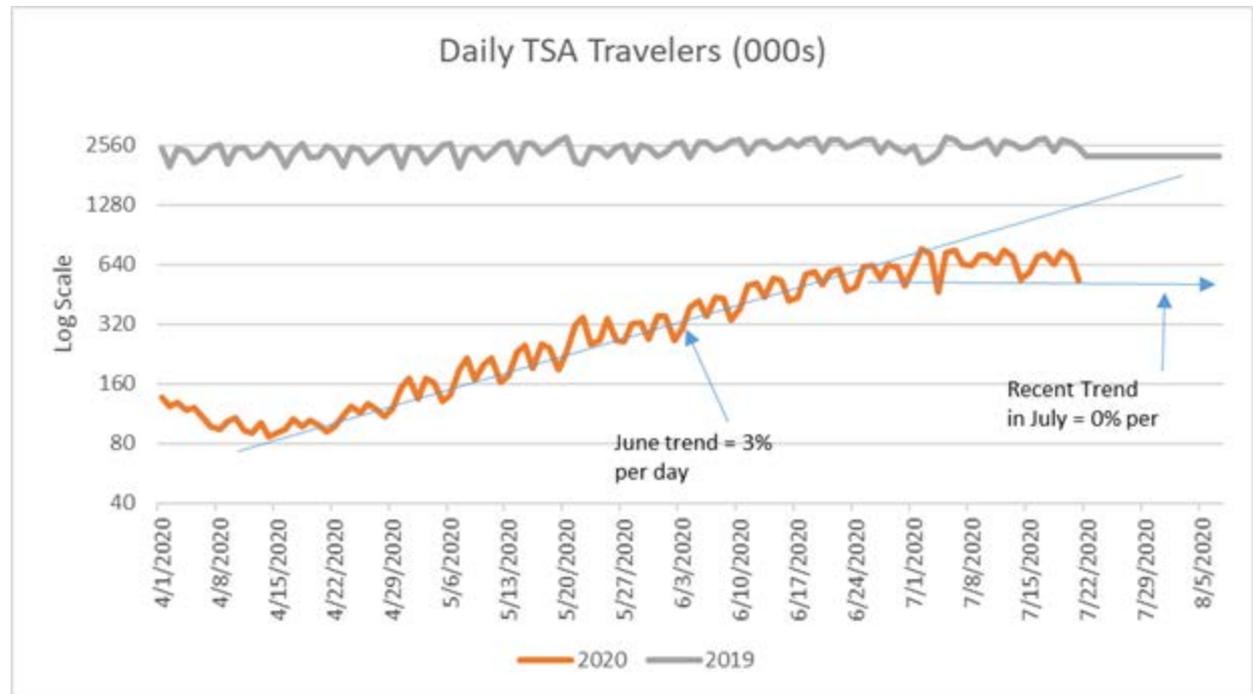
- Hawaii was trending up almost 20% for 2020 departures prior to the COVID-19 pandemic
- The second half of 2020 is now down 74% (as of July 22)



Pleasant
Holidays®

TSA

- Daily TSA checkpoint passengers were climbing at roughly 3% per day until cases began growing again in CA, TX, AZ, and FL
- TSA passengers have not grown since around July 01



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Holidays®

COVID-19 Recovery

Phase 1: We Are Always Here For You- Before, During and After

- Support with Cancellation & Rebooking
- Incentives to Postpone, Not Cancel
- Information & Advisories

Phase 2: It's Time to Let More Than Your Mind Wander

- Tap into desire to travel when stay-at-home orders are lifted
- Confidence and Flexibility with Cancel-For-Any-Reason Travel Protection Plans

Phase 3: You've Waited Long Enough – Time to Get Away

- Traveler Support
- Future Travel Credit Redemption
- Hawaii messaging takes center stage with Governor Ige's announcement on Testing Protocols and August 1 reopening of Hawaii

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Traveler Support

A portal providing timely and relevant information highlighting when it is best to travel and pertinent travel requirements

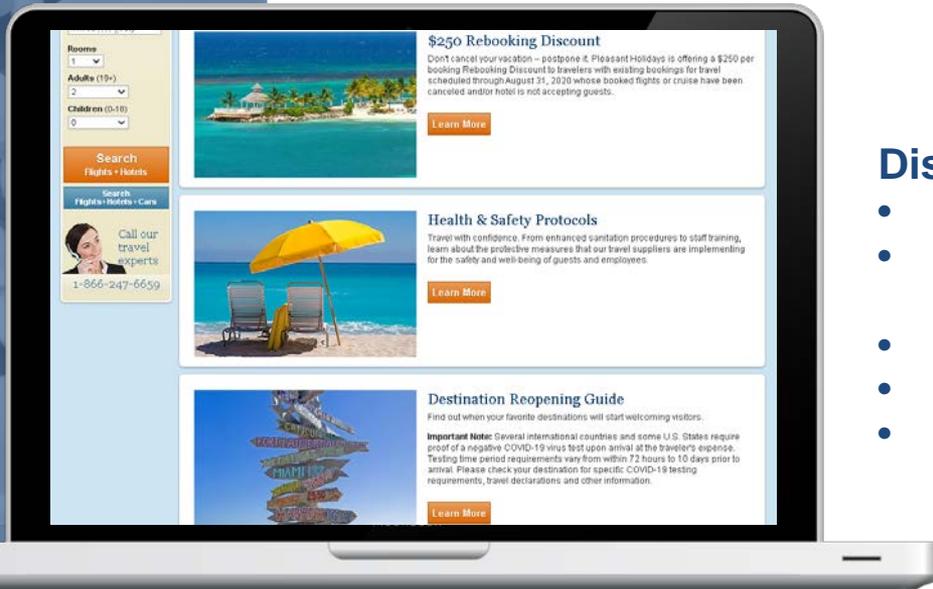
GOALS

Create Transparency

Customers evaluate information to decide when they are ready to travel

Build trust and confidence

Travel Protection and USTOA Travelers Assistance protect customer purchases



Distribution Channels

- Pleasant Holidays Website
- Digital Ads in Travel Trade Publications (*Travel Weekly*)
- eNewsletters
- Sales Flyers
- Social Media

TRAVEL PROTECTION PLAN TRENDS

- Travel Protection Plan has become a much more critical component of packaged vacation purchases since March 2020
- Travelers focused on Safety, Flexibility and Minimum Risk in Booking
- Travel Protection Plan revenue per booking is up 129% YoY since March 1, 2020

Pre-COVID-19

Cancel-For-Any-Reason Travel Protection Plans with Tiered Pricing

- Future Travel Credit option – great value
- Cash-Back Option – increased flexibility and protection

July 1, 2020

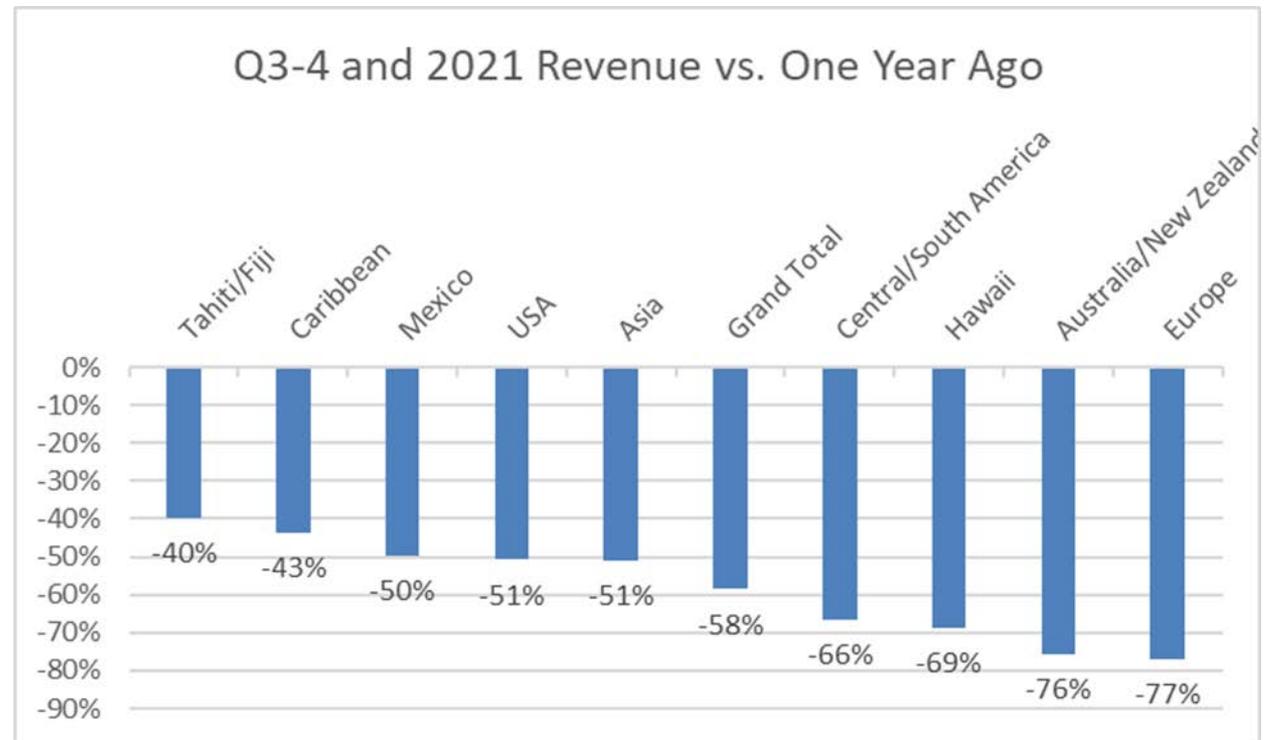
Introduced \$99 Flat Rate Pricing for Cancel-For-Any-Reason Travel Protection Plan (Future Travel Credit)

- An affordable option to protect vacation plans in an uncertain travel market

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Q3-Q4 2020 & 2021 Outlook

- Hawaii significantly lags all other major destinations except Europe, which is effectively closed to US visitors indefinitely
- Tahiti's performance has improved dramatically since COVID-19 testing regimen was announced



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Pleasant Activities

PRE COVID-19

- 25 Activity/Concierge Desks locations on four Islands
- 271 Vendors

JULY 2020

- 6% of our Activity vendors are current operating with less than 50 activities to sell across the Islands
- Due to hotel and activity closures, our business has been limited to Call-Center operations
- 11% of cancelled activities have been issued a Future Activity Credit
- Activity sales have stalled due to uncertainty in the market

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Optimistic Outlook for Hawaii

#WeWillRecover

- **Top U.S. leisure destination for vacationers**
- **Financial commitments on Oahu, Maui and Kauai**
 - Sheraton Maui Resort & Spa
 - Moana Surfrider, A Westin Resort & Spa
 - Aston Waikiki Beach Hotel
 - Kauai Marriott Resort
- **One of the top Tour Operators dedicated to Cruise sales**
- **Groups, Boutique Groups (Destination Weddings), Meetings & Incentives**
- **Activity Division headquartered in Hawaii**
 - Concierge Services
 - Activity Desk Operations

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Holidays**®



MAHALO

Pleasant Holidays[®]

CARIBBEAN • CENTRAL & SOUTH AMERICA • EUROPE • HAWAII • JAPAN & ASIA • MEXICO • SOUTH PACIFIC • UNITED STATES & CANADA • CRUISES

Agenda Item #7:

Presentation of establishing
a Surfing & Canoe Paddling
Advisory Group to the HTA
Board of Directors.

“This new sport Hawaii has given
(the world), reaches back into the
dim age of legends, when our kings
and chiefs found surf riding their
favorite pastime.”

~Duke Kahanamoku

Circa 1916

SURFING STATISTICS

- Estimated 60 million surfers
- Top 2 Surfing Regions
 - America: 13.5 million surfers
 - Oceania: 6.5 million surfers
- “Surfonomics”
- Worth \$50 billion a year globally, including travel, surfing goods, surfboard, manufacturing, etc.
- Median surfer: 34-year-old man who makes \$75,000 annually



Two developments which will enhance the global interest in surfing

CULTURE

- Lifestyle
- Spirit
- Museum



Focus on Youth

- Nurturing children – Marine Safety and Climate Change
- High school competitions
 - California
 - Florida
 - New Jersey
 - New York
 - North Carolina
 - South Carolina

Hawaii?

ECONOMICS

A background image of a surfer riding a wave in the ocean. The surfer is wearing a dark long-sleeved shirt and patterned shorts. The wave is breaking, creating white foam. The overall color palette is blue and white.

- Merchandise
- Global brands
- Professional Events
- Hawaii training spot for US Olympic Surf Team

(2018 California – surfing at official sport, LA hosting Olympics in 2028)

Agenda Item #8:

Review and discussions of the
approved FY 2021 budget

Hawaii Tourism Authority
Tourism Special Fund
FY 2021 Budget - Comparison for Marketing Committee

Program Code	Program Title	FY 2021 Budget				Original FY 2020 Budget	
		Original		Revised/Approved during June 25 Board Meeting	Changes Made during June 25 Board Meeting		
Perpetuating Hawaiian Culture							
200	Hawaiian Culture Programs - Unallocated	-		-	-	6,780,000	
201	Kukulu Ola: Living Hawaiian Cultural Prog	3,059,781		3,059,781	-	-	
202	Hawaiian Culture Initiative	950,000		950,000	-	-	
203	Ma'ema'e HTA	15,000		15,000	-	-	
204	Market Support	20,000		20,000	-	-	
208	Hawaiian Music and Dance Center	-		-	-	1,000,000	
297	Memberships and Dues - Hawaiian Culture	300		300	-	500	
298	Travel - Hawaiian Culture	-		-	-	15,000	
932	Salaries - Hawaiian Culture	217,140		217,140	-	285,000	
Subtotal	Perpetuating Hawaiian Culture	4,262,221	8.5%	4,262,221	8.8%	8,080,500	9.3%
(decr due to CHMD)							
Natural Resources [HRS 201B-11(c)(2) - Minimum Required: \$1,000,000]							
400	Natural Resources Programs - Unallocated	-		-	-	3,980,000	
402	Aloha Aina (formerly NR and Leg Prov NR)	2,376,276		2,376,276	-	-	
406	Visitor Impact Program	205,667		205,667	-	-	
936	State Employee Salaries - Natural Resources	77,459		77,459	-	66,950	
Subtotal	Natural Resources	2,659,402	5.3%	2,659,402	5.5%	4,046,950	4.7%
Community							
731	Community-Based Tourism - Oahu	925,000		825,000	(100,000)	-	
732	Community-Based Tourism - Maui County	925,000		825,000	(100,000)	-	
733	Community-Based Tourism - Hawaii Island	925,000		825,000	(100,000)	-	
734	Community-Based Tourism - Kauai	925,000		825,000	(100,000)	-	
705	Community Programs - Unallocated	-		-	-	5,789,252	
797	Memberships and Dues - Community	500		500	-	500	
798	Travel - Community	25,000		25,000	-	15,000	
933	State Employee Salaries - Community	147,120		147,120	-	210,000	
Subtotal	Community	3,872,620	7.7%	3,472,620	(400,000)	6,014,752	6.9%
Branding							
4	Cruise Infrastructure Improvements and Arrival Experience	50,000		50,000	-	250,000	
102	Hawai'i Tourism Summit	-		-	-	300,000	
306	Island-Based International Marketing	-		-	-	800,000	
316	MICE Asia (formerly MCI Global - Management)	-		-	-	350,000	
318	gohawaii.com (formerly Online Website Coordination)	300,000		300,000	-	350,000	
320	Island Chapters Staffing and Admin	2,400,000		2,400,000	-	3,170,000	
321	US (formerly North America)	17,685,707		17,685,707	-	22,525,000	
322	Canada	373,820		373,820	-	800,000	
323	Japan	5,000,000		5,000,000	-	10,000,000	
324	Korea	400,000		400,000	-	1,400,000	
325	Oceania	500,000		500,000	-	1,900,000	
326	Europe	-		-	-	400,000	
329	China	-		-	-	2,000,000	
330	Taiwan	-		-	-	500,000	
331	Meetings, Convention & Incentives	-	**	-	**	2,300,000	**
336	Southeast Asia	-		-	-	500,000	
339	Global Digital Marketing Strategy (former Intl Online Strat)	380,500		380,500	-	500,000	
350	Global Mkt Shared Resces (formerly Intellect Prop Data Bank)	787,000		787,000	-	797,000	
380	Marketing Opportunity Fund	-		-	-	2,000,000	
397	Memberships and Dues - Branding (US Travel Membership)	125,000		125,000	-	100,000	
398	Travel - Branding	50,000		50,000	-	50,000	
723	Hawaii Film Office Partnership (Required by Legislature)	30,000		30,000	-	30,000	
934	State Employee Salaries - Branding	508,648		508,648	-	539,050	
Subtotal	Branding	28,590,675	56.9%	28,590,675	58.7%	51,561,050	59.4%
Sports							
312	PGA Tour Contracts	2,166,864		2,166,864	-	-	
342	Maui Jim - Maui Invitational	50,000		-	(50,000)	-	
345	ESPN Hawaii Bowl / Diamond Head Classic	475,000		-	(475,000)	-	
377	Polynesian Football HoF	155,000		155,000	-	-	
378	UH Athletics Branding Partnership	316,000		316,000	-	-	
379	Sports Programs - Unallocated	-		-	-	7,200,000	
384	Football (Hula Bowl)	25,000		-	(25,000)	-	
Subtotal	Sports	3,187,864	6.3%	2,637,864	(550,000)	7,200,000	8.3%
Safety and Security							
601	Visitor Assistance Programs	650,000		500,000	(150,000)	650,000	
602	Crisis Management	850,000		391,667	(458,333)	100,000	
603	Lifeguard Program	-		-	-	700,000	
604	Preventative Programs	-		-	-	400,000	
606	Safety and Security Opportunity Fund	-		-	-	300,000	
Subtotal	Safety and Security	1,500,000	3.0%	891,667	(608,333)	2,150,000	2.5%
Tourism Research [HRS 201B-7 - Necessary to Support Requirement: \$2,215,620]							
501	Data Dissemination	-		-	-	54,000	
505	Est of Visitor Arrivals by Country by Month	3,500		3,500	-	6,000	
506	Infrastructure Research (Accommodations and Airseats)	520,879		520,879	-	556,330	
512	Visitor Arrivals and Departure Surveys	1,150,581		1,150,581	-	1,314,540	
513	Evaluation and Performance Studies	662,810		662,810	-	1,148,405	
514	Marketing Research	42,850		42,850	-	498,797	
597	Memberships and Dues - Research	42,322		42,322	-	7,322	
598	Travel - Research	-		-	-	15,000	
935	State Employee Salaries - Research	384,180		384,180	-	393,000	
Subtotal	Tourism Research	2,807,122	5.6%	2,807,122	5.8%	3,993,394	4.6%
Administrative							
101	Community-Industry Outreach & Public Relations Svcs	265,000		265,000	-	250,000	
103	hawaiiauthority.org (formerly HTA web/Global Social)	100,000		75,000	(25,000)	100,000	
901	General and Administrative	303,700		303,700	-	401,700	
930	State Employee Salaries - Admin	1,047,227		1,047,227	-	1,075,000	
998	Travel - Admin	10,000		10,000	-	50,000	
Subtotal	Administrative	1,725,927	3.4%	1,700,927	(25,000)	1,876,700	2.2%
Governance and Organization-Wide							
915	Organization-Wide	195,000		195,000	-	240,000	
919	Governance - Gen Board/Others	89,600		89,600	-	146,300	
931	State Employees Fringe	1,367,590		1,367,590	-	1,481,142	
Subtotal	Governance and Organization-Wide	1,652,190	3.3%	1,652,190	3.4%	1,867,442	2.2%
Total Budget*		50,258,021	100%	48,674,688	100%	86,790,788	100%
Allocation Shortage		(1,583,333)		-		-	

*HTA's FY 2021 budget of \$48,674,688 includes \$5M in funding that we requested the Governor to release from HTA's Tourism Emergency Fund.

** In FY 2021 the Meetings, Conventions & Incentives budget, that was \$2.3M in FY 2020, was absorbed into the \$17,685,707 US (Leisure) budget.

Agenda Item #9:

Update Relating to HVCB's
Recovery Plan and What Has
Been Implemented

Hawai'i Tourism Authority

Marketing Standing Committee Meeting

July 29, 2020

9/1/20 Reopening Communications Strategy

1. Market Insights

- Hawai'i Target Traveler Mindset

2. Communications Plan

- Gohawaii.com
- Public Relations
- Travel Sellers
- Industry Partners
- Creative Update
- Paid Media Plan

3. MCI Updates

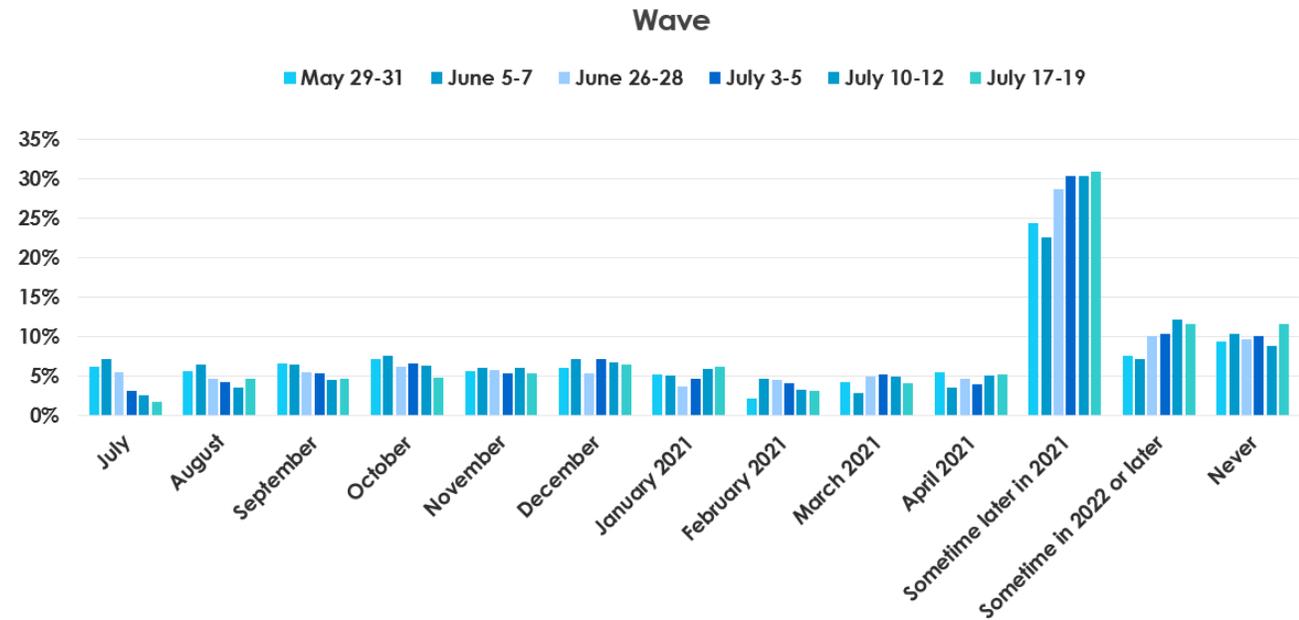


U.S. Resident Travel Sentiment Remains Low, Tourism Recovery Will Start Slowly

- 37.6 percent now say they'll probably take more regional trips while avoiding long-haul trips due to the coronavirus.
- The average distance away from home for American travelers' commercial airline trip is reported to be 1,065 miles.
- 85.7 percent of travelers expressed some level of concern for the national economy.
- 72.5 percent of Americans say they have some level of concern about contracting the virus.

Many American travelers are pushing their air trips to 2021.

Nearly half (49.4%) said they expect to take their next commercial airline trip sometime next year and haven't decided on a specific date.



Source: Destination Analysts Coronavirus Travel Sentiment Index Report Waves 13-14, 16-19

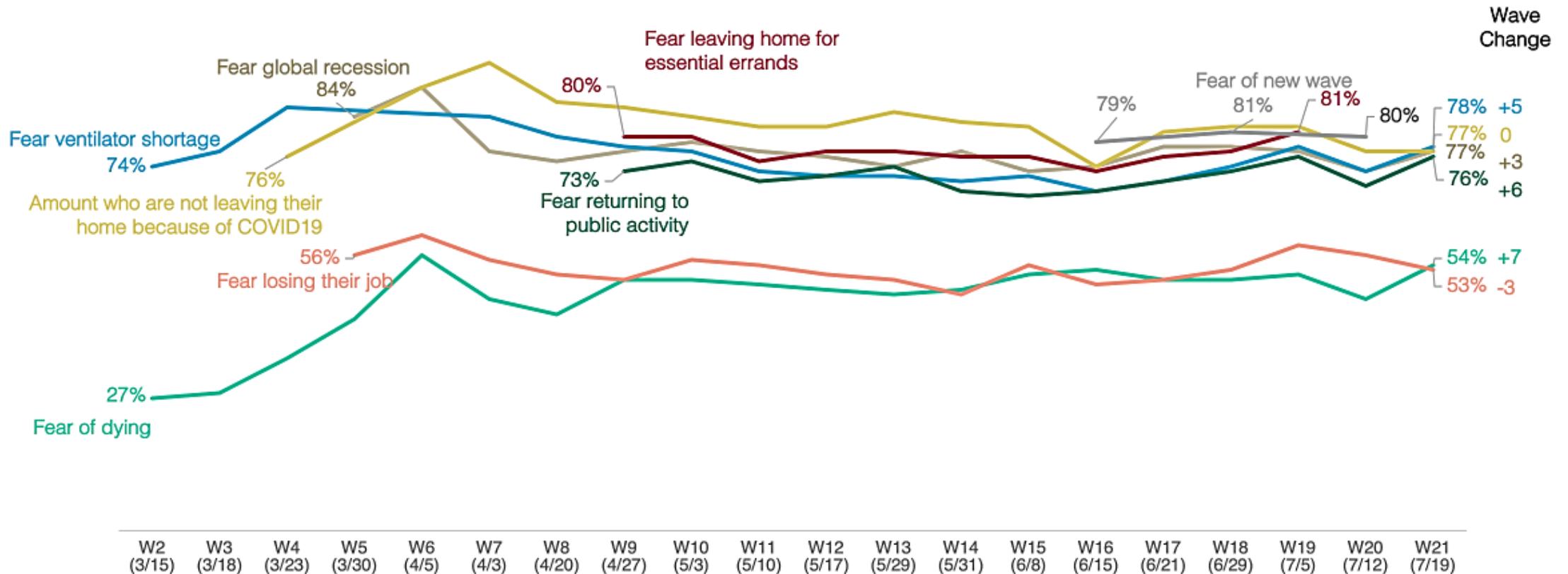
The Harris Poll: COVID-19 in the U.S.

The Task for Communicators: Lifting the Curtain of Fear

54% thought national fear was irrational

Trended Fear Curves During COVID19

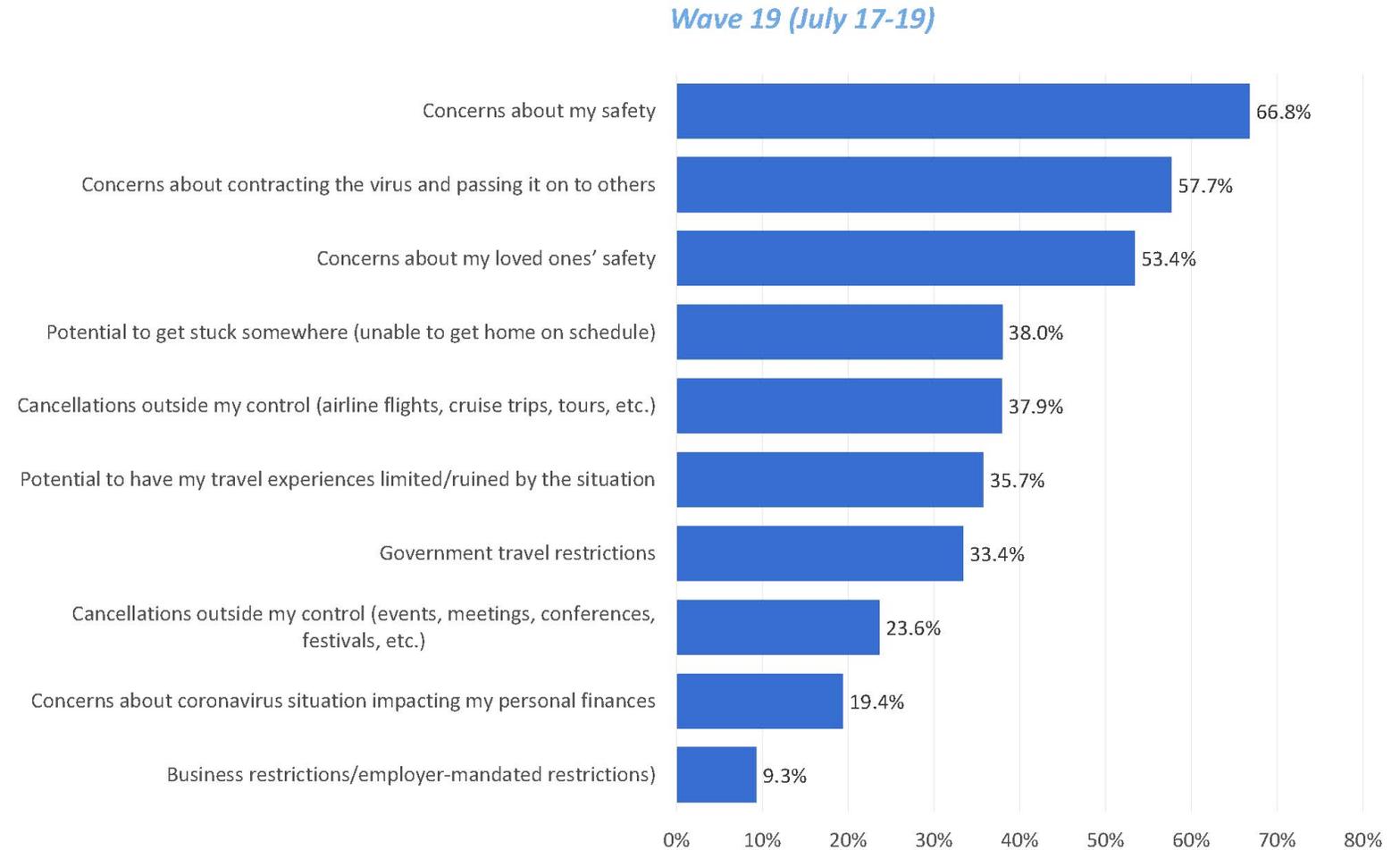
73% now think national fear is sensible



Why the Coronavirus is Impacting Travel

Question: Which of the following are reasons the coronavirus situation has changed your travels?

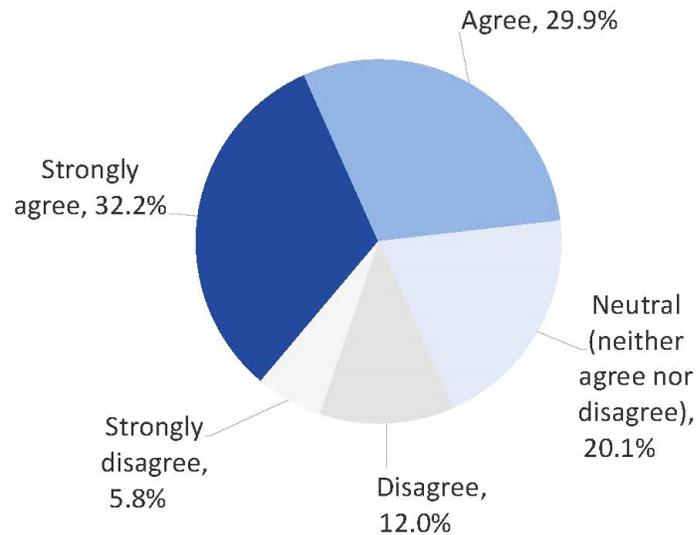
(Base: Wave 19. Respondents whose travel was impacted by the coronavirus, 936 completed surveys. Data collected July 17-19, 2020)



Avoiding Travel until the Crisis Blows Over

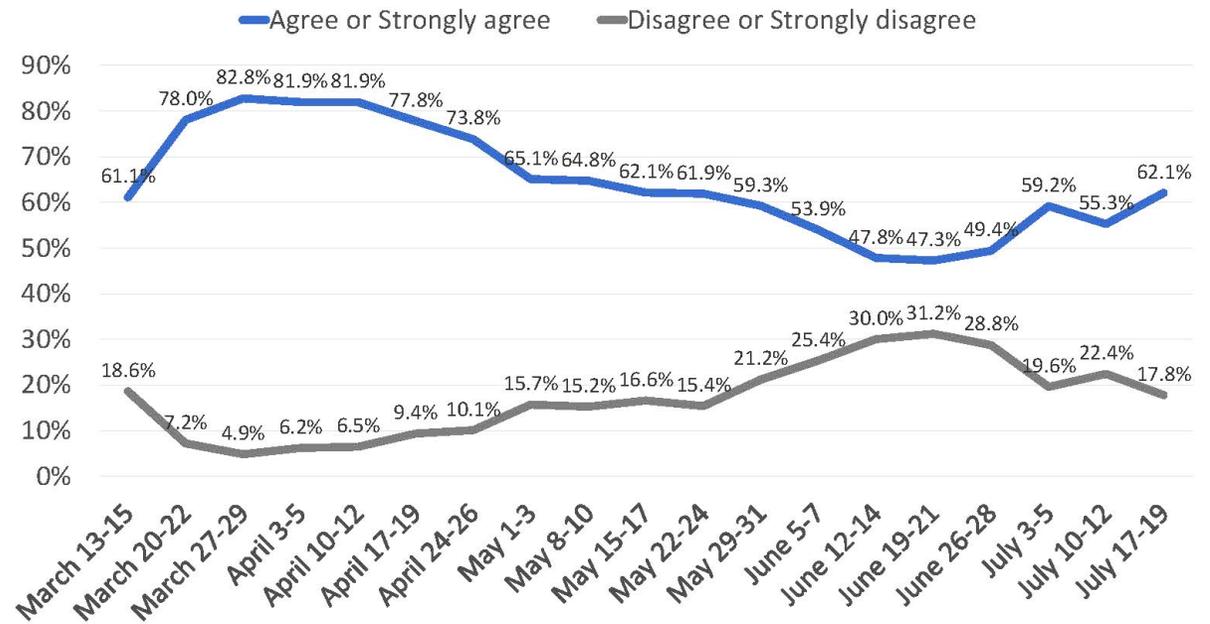
How much do you agree with the following statement?

Statement: I'm planning to avoid all travel until the coronavirus situation blows over.



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12 and 17-19, 2020)

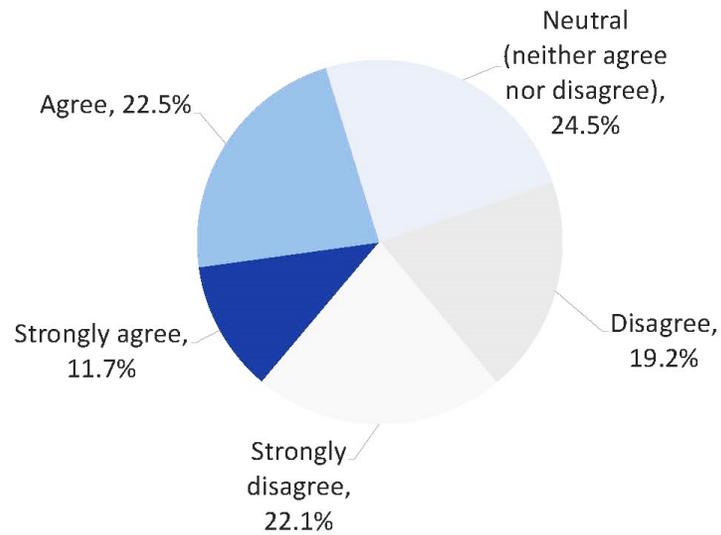
Historical data



Expectations for Traveling in the Fall

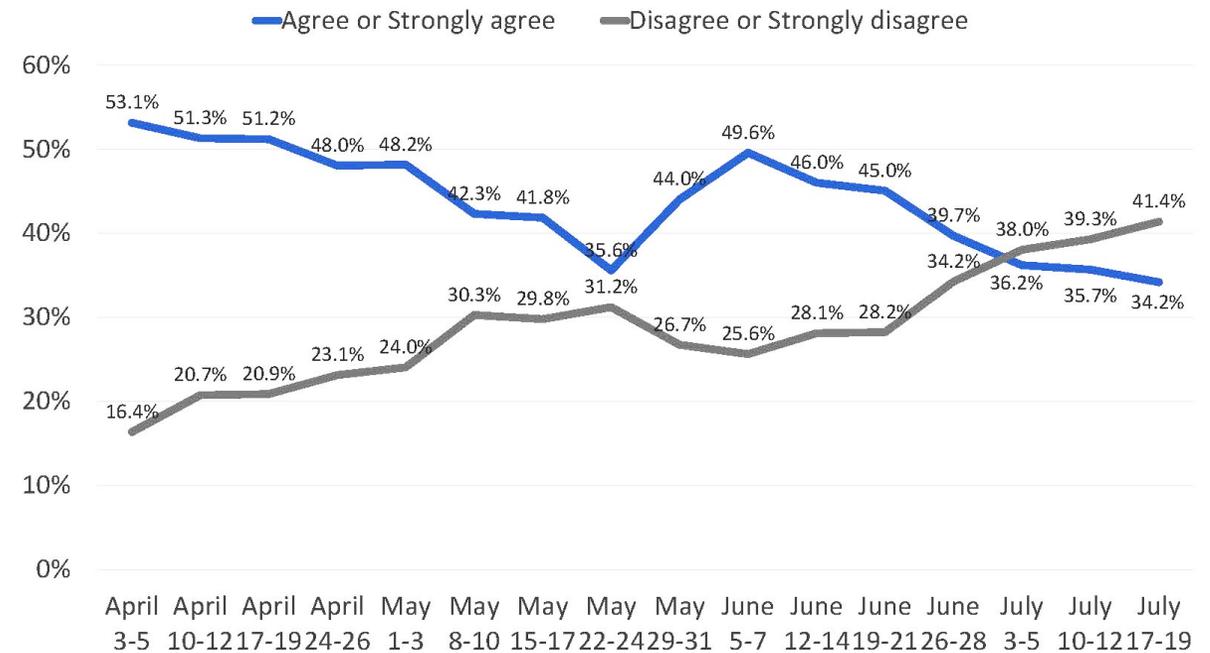
How much do you agree with the following statement?

Statement: I expect that I will be traveling in the Fall of 2020.



(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12 and 17-19, 2020)

Historical data

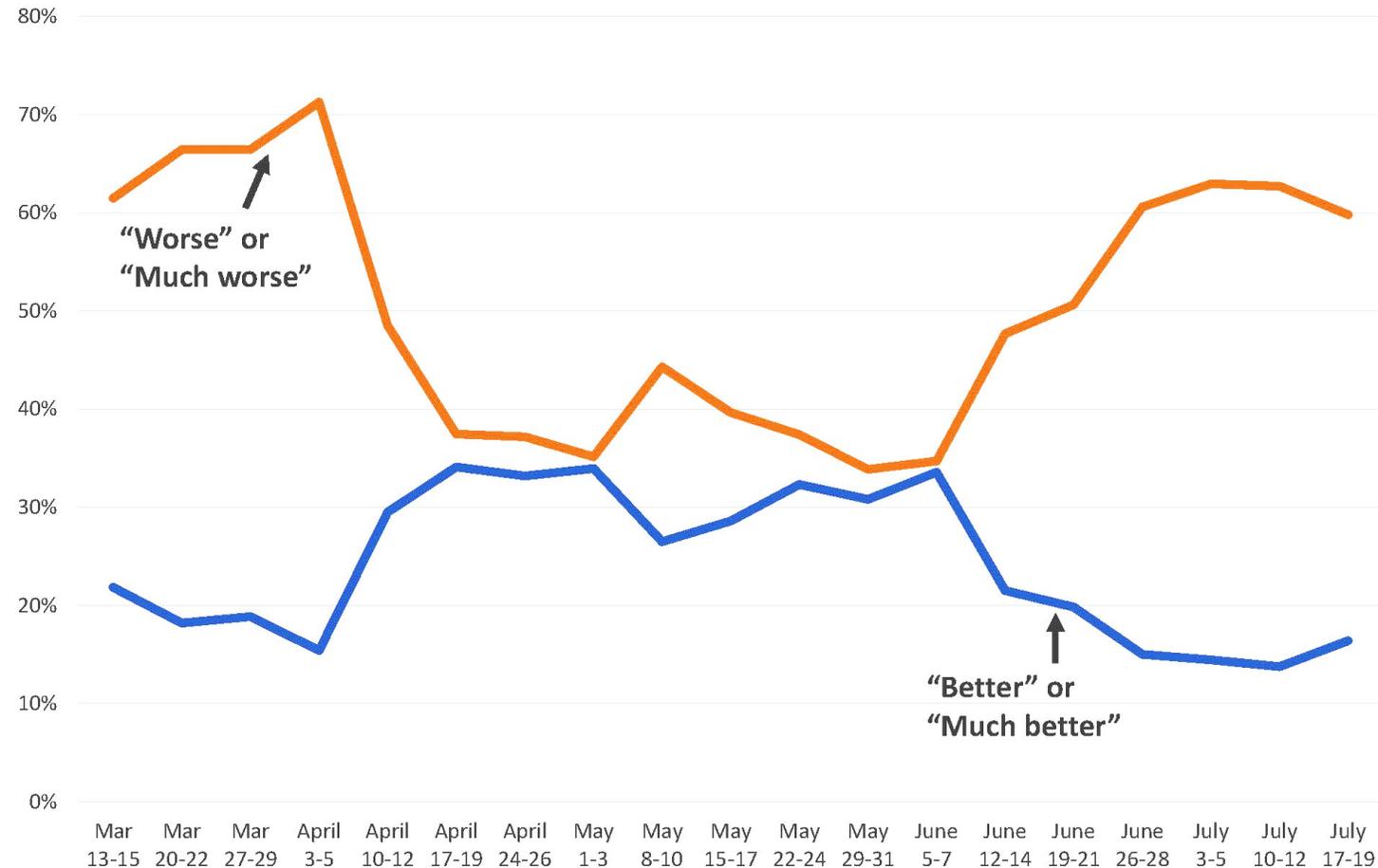


Expectations for the Coronavirus Outbreak

Question: In the NEXT MONTH, how (if at all) do you expect the severity of the coronavirus situation in the United States to change? (Select one)

In the next month the coronavirus situation will _____

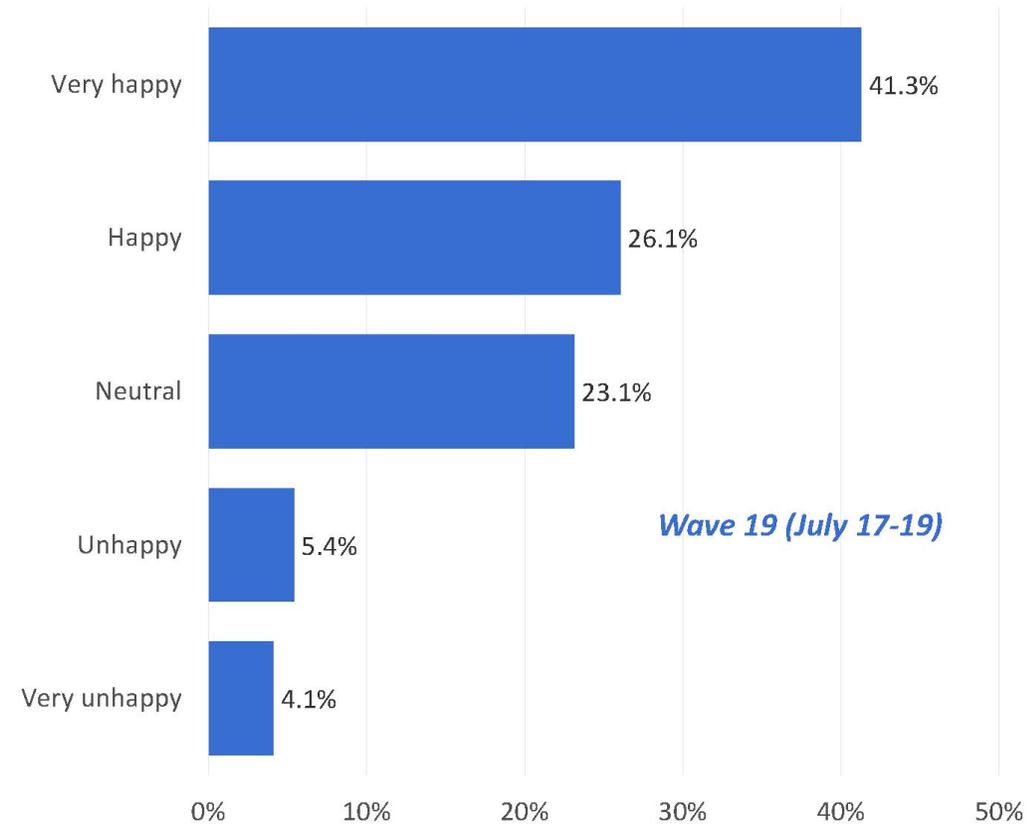
(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12 and 17-19, 2020)



Feelings about Destinations Requiring masks

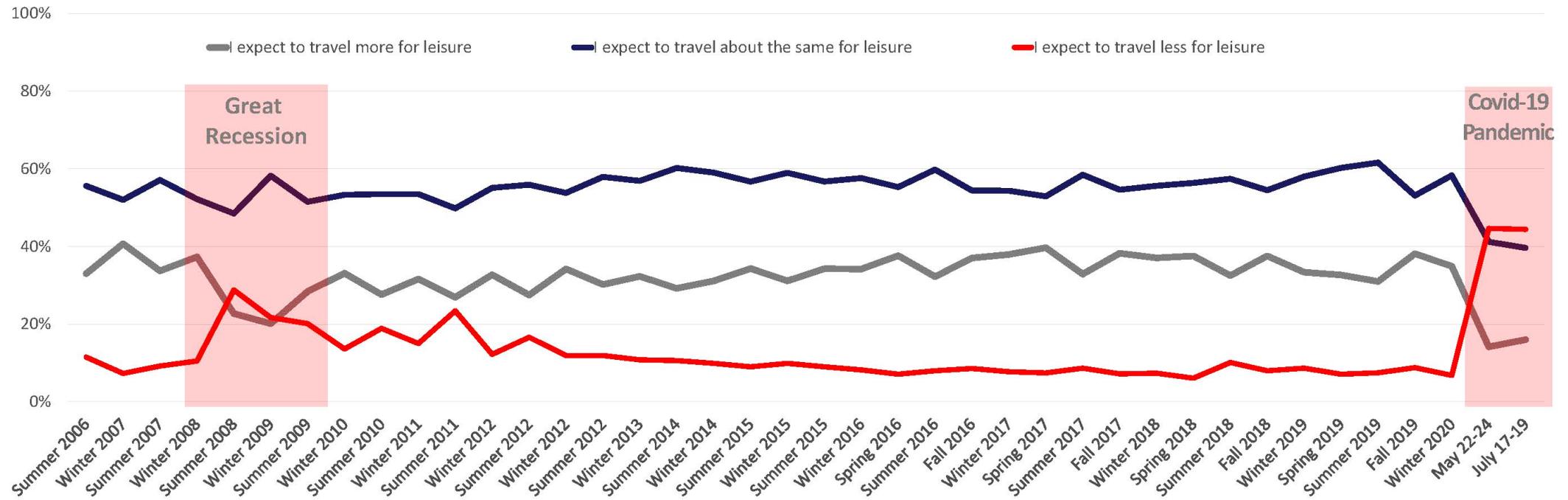
Question: Which best describes how you would feel if a destination you wanted to visit required visitors and residents to wear masks while in public?

(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)



Historical Perspective: Leisure Travel Expectations (Trips Taken)

Question: In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12-month period?



(Base: All respondents, 1,223 and 1,200 completed surveys. Data collected May 22-24, and July 17-19, 2020)

The Challenge

Situation

Effective communication of established layered safety measures and protocol, to visitors who are leery of flying long distances and locals who are reluctant to receive them.

Background

Residents care about:

- health and safety for themselves and their greater 'ohana (community)
- perpetuating the beauty (cultural and environmental sustainability) of Hawai'i

Visitors care about:

- health and safety from all aspects of the destination

Delivery

Focus marketing efforts on respectful visitors.

Deliver messaging to visitors on our community values and what their appropriate behavior is while visiting.

Share the approach with our community.

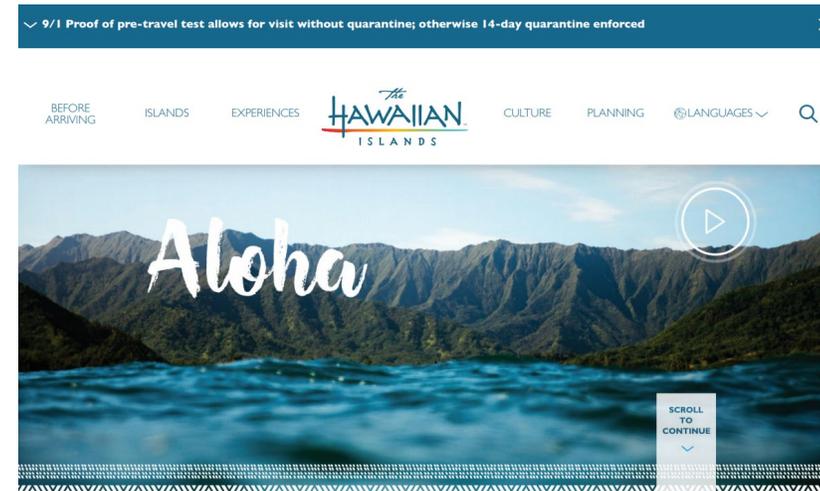
Gohawaii.com



Gohawaii.com – COVID-19 Content Update

Provide Information to Invite Guests Back to Hawai'i

- Create a new section on the main navigation, “Before Arriving”
- Change the red Special Alert bar to *The Hawaiian Islands* brand teal color
- Red will be reserved for urgent alerts such as hurricanes and tsunamis



Gohawaii.com – COVID-19 Content Update

9/1 Proof of pre-travel test allows for visit without quarantine; otherwise 14-day quarantine enforced

BEFORE ARRIVING ISLANDS EXPERIENCES  CULTURE PLANNING LANGUAGES



SCROLL TO CONTINUE

We are excited to welcome visitors back to the Hawaiian Islands beginning September 1, 2020.

The culture of our Hawaiian Islands is steeped in the values of *hoʻokipa* (hospitality) and *aloha*. We warmly invite you to reconnect with our people, culture and home safely and responsibly. As you may know, Hawaii residents have sacrificed a great deal to keep our communities safe during this pandemic and, in doing so, have achieved one of the lowest COVID-19 case rates and lowest virus transmission rates of any state in the nation.

Now that visitors can once again enjoy Hawaii's breathtaking natural beauty, extraordinary open spaces, unique experiences and signature hospitality, we are asking you to join in our efforts to help keep Hawaii safe.

The following information will acquaint you with new safety protocols and precautions you will need to adhere to, both before flying to Hawaii and while here in the Islands.

Gohawaii.com – COVID-19 Content Update

PLANNING YOUR VISIT AND PRE-DEPARTURE



- **The state of Hawaii's 14-day mandatory self-quarantine for all travelers arriving in the Hawaiian Islands** has been extended through August 31, 2020. Visit the [HAWAII STATE DEPARTMENT OF HEALTH'S WEBSITE](#) for the most up-to-date information.
- **Remember to pack your mask and/or facial coverings in your carry-on luggage.** All inbound visitors age XX and above are required to wear a mask at all airports and continue to do so until entering their room at their confirmed place of lodging.
- **To avoid Hawaii's 14-day mandatory self-quarantine, you must have a valid negative COVID-19 test administered within 72 hours of departure and completed prior to boarding.** Travelers of all ages must show proof of a valid negative COVID-19 nucleic acid amplification test (NAAT), as approved or authorized for use by the U.S. Food and Drug Administration (FDA) from a [CLINICAL LABORATORY IMPROVEMENT AMENDMENTS \(CLIA\)](#) licensed or certified laboratory. You are responsible for the cost of the pre-travel test. No COVID-19 testing will be provided at Hawaii's airports.
- **Travelers who arrive without proof of a valid negative COVID-19 NAAT will be subject to the state's strict 14-day mandatory self-quarantine.** Visit our [Self-Quarantine webpage](#) for self-quarantine requirements.
- **All out-of-state travelers to the Hawaiian Islands are required to fill out and complete the state of Hawaii**

Gohawaii.com – COVID-19 Content Update



- While in flight and deplaning, **travelers must follow the guidance of their air carrier regarding physical distancing, mask wearing and sanitation processes.**
- Travelers arriving in Hawaii will need to complete a required **STATE TRAVELER HEALTH FORM AVAILABLE ONLINE** which will be validated upon arrival.
- **All incoming Hawaii travelers will have their temperature checked upon arrival.** Temperature scans will be taken via thermal temperature screening and facial-imaging technology. Airport facial-imaging technology will only temporarily retain photos of persons with elevated temperatures of 100.4 degrees Fahrenheit and above to help airport representatives identify them and conduct additional assessments determining if health-related precautions are necessary.
- **Should travelers have a temperature of 100.4 degrees Fahrenheit or higher, display any COVID-19 symptoms, or provide answers on the STATE TRAVELER HEALTH FORM requiring additional testing,** they will be required to complete a secondary screening at the airport, to be performed by trained health care staff.
- **Travelers who arrive without proof of a valid negative COVID-19 NAAT will be subject to the state's strict 14-day mandatory self-quarantine.** Visit our [Self-Quarantine webpage](#) for self-quarantine requirements.

Gohawaii.com – COVID-19 Content Update

BEING A PONO (RESPONSIBLE) TRAVELER WHILE IN HAWAII



- **By following the simple and sensible guidelines below**, you are sharing your aloha with the people of Hawaii and fellow travelers.
- **Always wear your mask or facial covering in public!** Your mask or facial covering must cover your nose and mouth.
- **Practice Good Hygiene** by washing your hands frequently for 20 seconds each time.
- **Practice physical distancing** by maintaining 6 feet of physical distancing from others while you are out enjoying Hawaii.
- **Complete the Inter-island Traveler Health Form when traveling between islands.** Inter-island travel is permitted for visitors who are not under quarantine orders. However, all passengers on inter-island flights are required to have their temperature checked and complete a **HAWAII STATE DEPARTMENT OF HEALTH INTER-ISLAND TRAVELER HEALTH FORM** prior to boarding. The form may be filled out and submitted online. Once the form is successfully completed and submitted, passengers will be emailed a QR code which they must have with them at the airport prior to departure.
- **Be responsible and aware of what to do if you get sick.** If you become ill with a fever or cough while in Hawaii, have recently departed an area with widespread community transmission of COVID-19, and/or have had

Public Relations



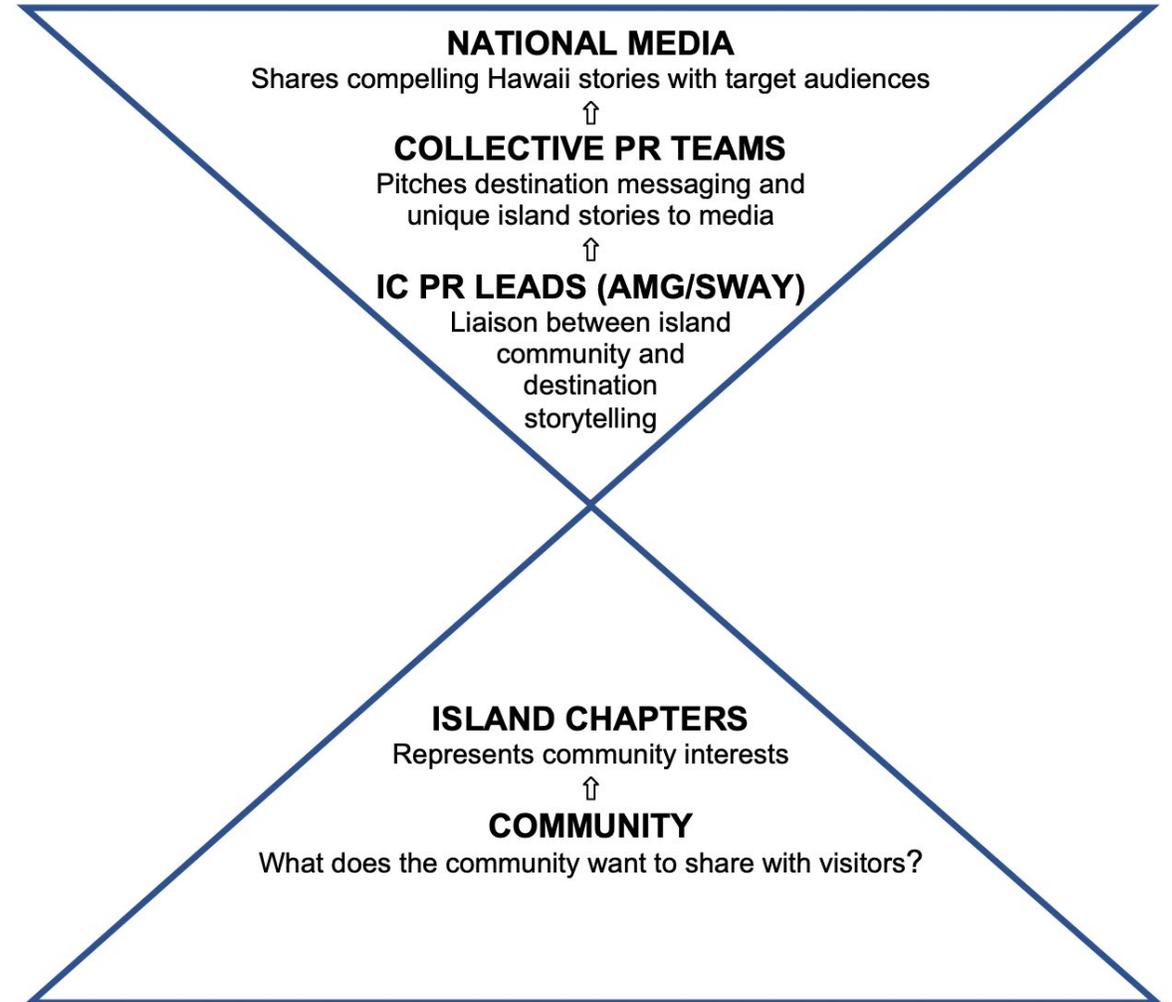
Public Relations

Strengthen Connections With Our Community

- Bridge the gap between what the community wants to share and what will best resonate with media that our audience consumes
- Messaging from our communities will also flow through Local Ambassadors

All-Island Team Approach

- AMG and SWAY will work collaboratively to find efficiencies and leverage media relationships
- Statewide and Island-Specific Communications With Industry Partners To Coordinate Messaging



**DRAFT*

Proactive Outreach

Editorial Coverage

- Focus on key West Coast and National Outlets
- Prioritize Digital Media Delivery

Messaging

- Health & Safety Protocols
 - For Entry
 - Once in the destination
- Unique Stories across the destination:
 - Resort activities
 - Ways to connect with and help to perpetuate our Culture, Communities, and the beauty of our Environment
 - Engage Ambassadors



Current State of Travel Media

"I want to focus on the ethics of traveling, traveling with kindness, and wellness in my stories."



Amber Gibson
Forbes.com

"Outside and Condé Nast have done a particularly good job with COVID coverage."



Jen Murphy
Wall Street Journal,
Condé Nast Traveler

"Reading AFAR, Nat Geo for travel inspiration."



Ian Centrone
Men's Journal,
Travel + Leisure

"Consistently reading CNN Travel, Travel Weekly, Outside, Forbes Travel, AFAR."



Jeanne Cooper
SFGate.com

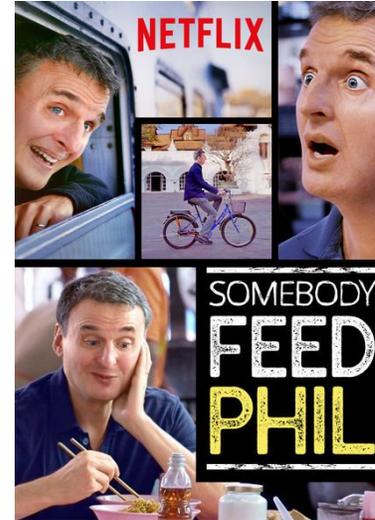
Big PR Hits Airing Oct. 2020

Somebody Feed Phil, Netflix

- Hosted by Phil Rosenthal, creator of *Everybody Loves Raymond*
- #1 Hosted Food & Travel Program on Netflix
- Approx. 20-24M viewers

Field Trip with Curtis Stone, PBS

- Hosted by Curtis Stone, Michelin-Star chef and restaurateur
- Airing on 96% of PBS stations nationwide
- Approx. 1.8M viewers per week



Travel Sellers



Travel Trade Strategy

Awareness & Communication

Education & Training

Partner Marketing

- Updating website and training content with appropriate safety messaging
- Focus on virtual learning and virtual platforms
 - 36% increase in certification graduates Mar – Jun 2020
- Launch trade media with new post COVID messaging
 - To ensure Hawai`i is a top destination for late 2020 and 2021 and encourage certification completions
- Shifting from individual wholesale plans/tactics to an HVCB executed program where partners can buy into a destination coop program
- Providing a digital marketing toolkit with HVCB messaging and partner offers to travel advisors where they will be a call to action for our coop program.
- HVCB will be conducting the first ever virtual Hawai`i Destination Expo

Industry Partners



Visitor Journey

ACTION



Thinking about traveling, conducting searches to find ideas and inspiration for where to go and what to do.

Deep in consideration mode, deciding which hotel, airline, rental car to book, based on location, safety, loyalty program and cost.

People have made their decision and book their reservations.

Searching for things to do and new places to visit on their trip.

Flight check-in—often as much as 24 hours in advance—and arrive at the airport to board plane.

Travelers are a captive audience from boarding their plane to landing at their destination.

Visitors are arriving at the airport, taking transportation to their accommodations and checking in.

Visitors are going to beaches, state parks, shopping, dining and going on tours.

Visitors are leaving the destination to head home.

MESSAGE

Hawai'i is Open – Welcome Back

Partner travel deals and details on safety procedures.

Safety guidelines

Activities that help economy with an emphasis on safety requirements and respectful behavior

Reiterate safety guidelines, any pre-departure requirements

Please respect our health and safety guidelines.

Welcome, please follow safety guidelines.

Reiterating safety messages.

Mahalo. Please share your positive experience.

ASPIRATIONAL

FUNCTIONAL

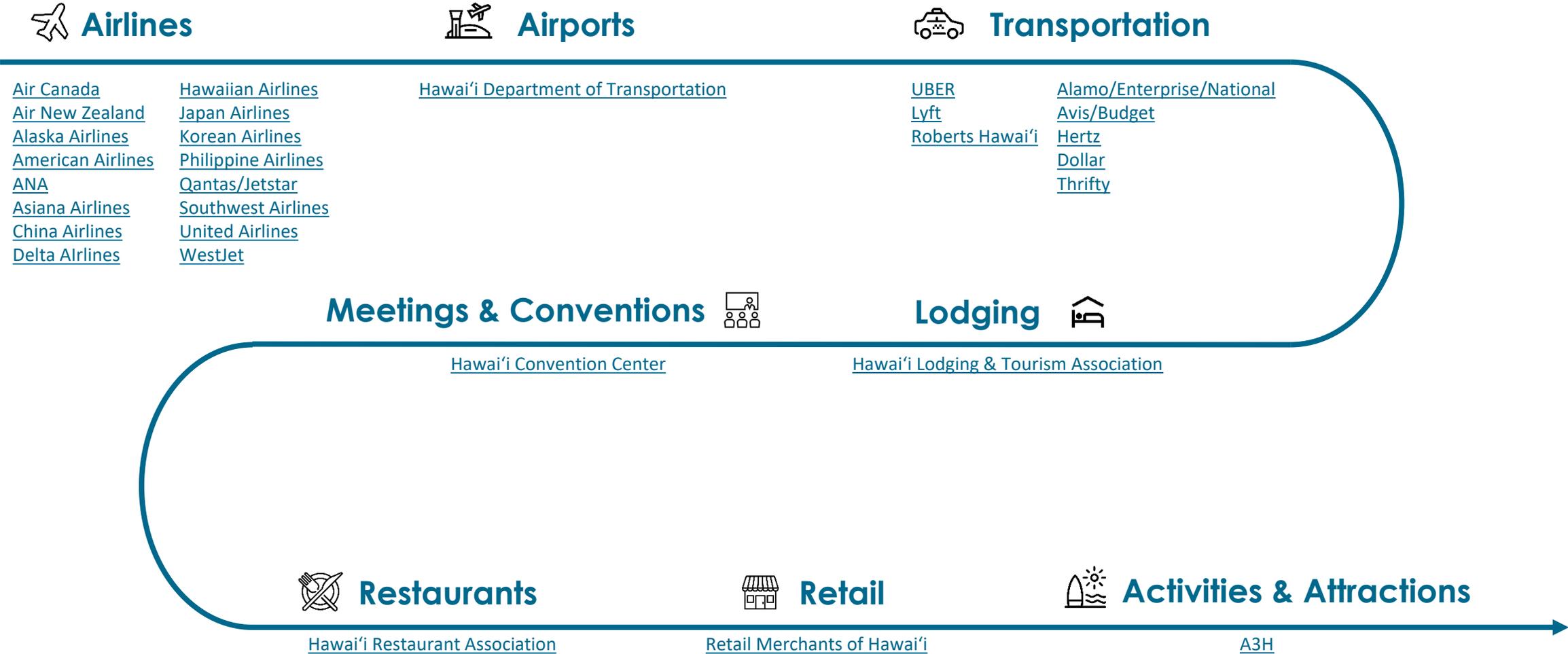
JOURNEY



MEDIA/COMMUNICATIONS

<p>Videos YouTube Travel Sites TV Streaming Services/ Advanced TV</p> <p>E-Newsletters</p> <p>Search Google Ads Websites</p> <p>Social Media Organic Paid Ads Influencers (UGC)</p> <p>News Public Relations</p> <p>Online Native Content Digital Ads</p>	<p>E-Newsletters (HVCB) Including Member Ads (hotels, airlines, activities)</p> <p>Digital Ads Including Member Ads (hotels, airlines, activities)</p> <p>Airlines Google Search Digital Ads on Travel Booking Sites E-newsletters</p> <p>Hotels Google Search Digital Ads on Travel Booking Sites E-newsletters</p>	<p>Email Confirmation email</p>	<p>E-Newsletters</p> <p>Social Media Organic Influencers (UGC) Paid Ads</p> <p>Public Relations</p> <p>Native Content</p>	<p>Airline Mobile App</p> <p>Airline Website</p> <p>Airport Check-in Kiosks</p> <p>Airline Gate Video Posters</p> <p>Hotels Pre Check-in Communications</p>	<p>Video In-flight Entertainment (Personal device, seat backscreens)</p> <p>Flyer/ Digital Guide</p>	<p>Gates Video Posters</p> <p>Baggage Claim Video Posters</p> <p>Rental Car Facility Posters/Flyers Video</p> <p>Airport Shuttle Video Poster</p> <p>Cab/Ride Share Posters/Flyer Digital Guide</p> <p>Hotel Check-in Flyer/ Digital Guide In-Room Video</p> <p>Social Video</p>	<p>Registration Desk Signs</p> <p>Park Signs</p> <p>Digital Apps Existing Destination Specific</p> <p>In-Room Kuleana Videos</p>	<p>Check-in Kiosks Airport Video</p> <p>Airline Gates Poster</p>
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The Visitor's Journey: Health Procedures and Protocols



A lush green forest scene with a waterfall cascading into a dark pool. The foreground is dominated by large, vibrant green leaves, some of which are being held by a hand on the left side. The background is a dense, verdant hillside covered in various types of trees and foliage. The overall atmosphere is serene and natural.

It's Time

Creative Update

Messaging Strategy

- Maintain Brand Integrity
- Dial-Up Responsible Traveler Messaging
- Share Health & Safety Protocols

Messages

- Pre-Arrival
- Post-Arrival

Paid Media

- Parameters
- Media Consumption
- Overarching Strategies

Messaging Strategy

Strategy

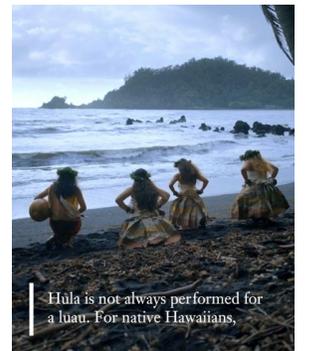
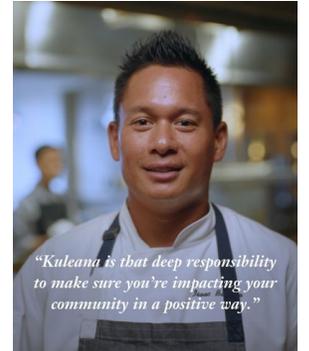
Continuation of the Hawai'i Rooted campaign

- Local Ambassadors delivering messages to visitors about appropriate behavior in Hawai'i while inviting them back

Tactics

Utilize existing creative assets as much as possible

- Deliver creative units primarily on digital video and social platforms, OTT and addressable TV as affordable
- Visually communicate
 - purity of the environment,
 - the clean / pure air and water
 - wide open spaces



Messaging Strategy

Pre-Arrival Communication

- Our resort areas are open, come enjoy them
- Importance of appropriate behavior when visiting our communities, while out in nature, and for our culture

Post-Arrival / In-destination

- Share what is appropriate behavior in-destination:
 - for their health and safety, and that of our community,
 - to respect our culture,
 - to perpetuate the environment
- Share samples of the campaign and the overall approach of how we are - targeting respectful visitors, presenting Hawaii and asking visitors to behave - with residents/media's editorial staff around the state



Ocean Health



Travel Pono



Ocean Safety



Land Safety

Uploads ▶ PLAY ALL



Visitor Target

REJUVENATE

Thoughtful visitors looking to rejuvenate will find everything they could hope for awaiting them in the Hawaiian Islands – our gorgeous natural environment, fresh air blowing in off the ocean, clean, clear waters, blue skies, wide open vistas, spectacular open spaces, and our spirit of aloha.

SENSITIVITY

Visitors will have more meaningful experiences when they respectfully connect with our vibrant culture and understand the values which shape our behaviors. We need to share those values so they can be clear on what appropriate behavior is.

RESPONSIBILITY

Share details of the public health travel tips necessary to protect residents, and travelers, from COVID exposure and transmission.

Kuleana video goes here

It's Time video goes here

Media



Media

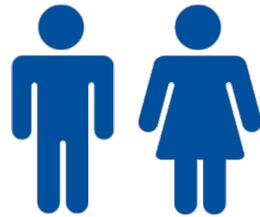
1. Parameters
2. Media Consumption
3. Marketplace Considerations
4. Media Plan



Parameters



Flighting
Sept - Dec



Target Audience
A25-54
Respectful Travelers
Repeat Hawaii Visitors



Budget
\$4.6 mil



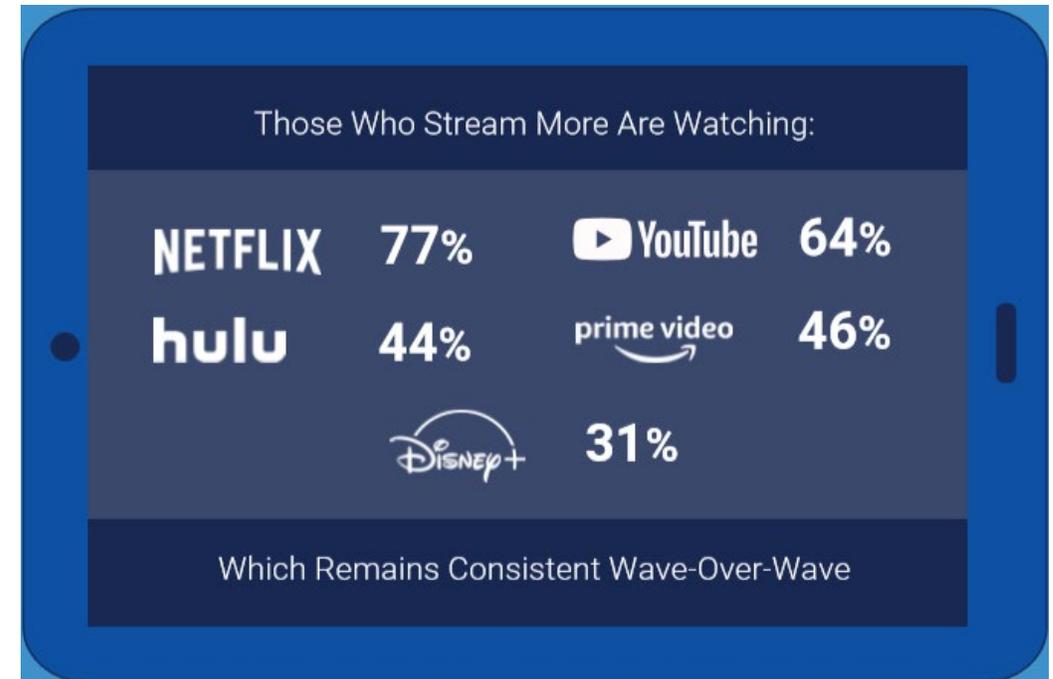
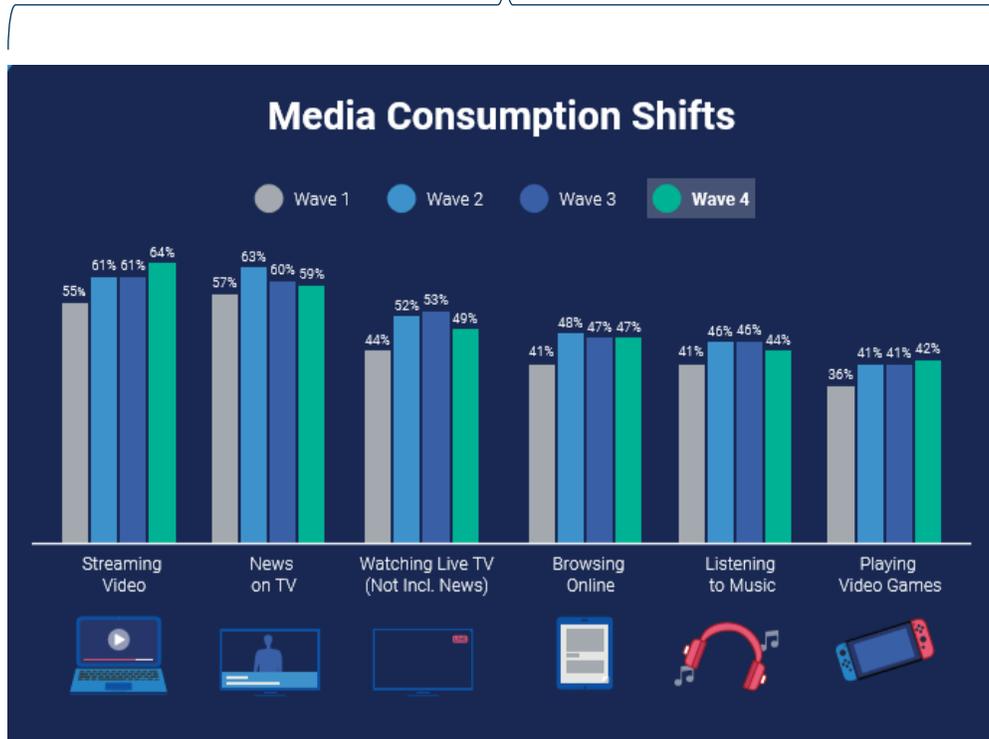
Geography
Los Angeles
San Francisco
Seattle
Portland

U.S. Media Consumption During COVID-19

During the height of COVID-19 pandemic, streaming video continues to increase

Streaming Has Increased Significantly as the Outbreak Has Progressed

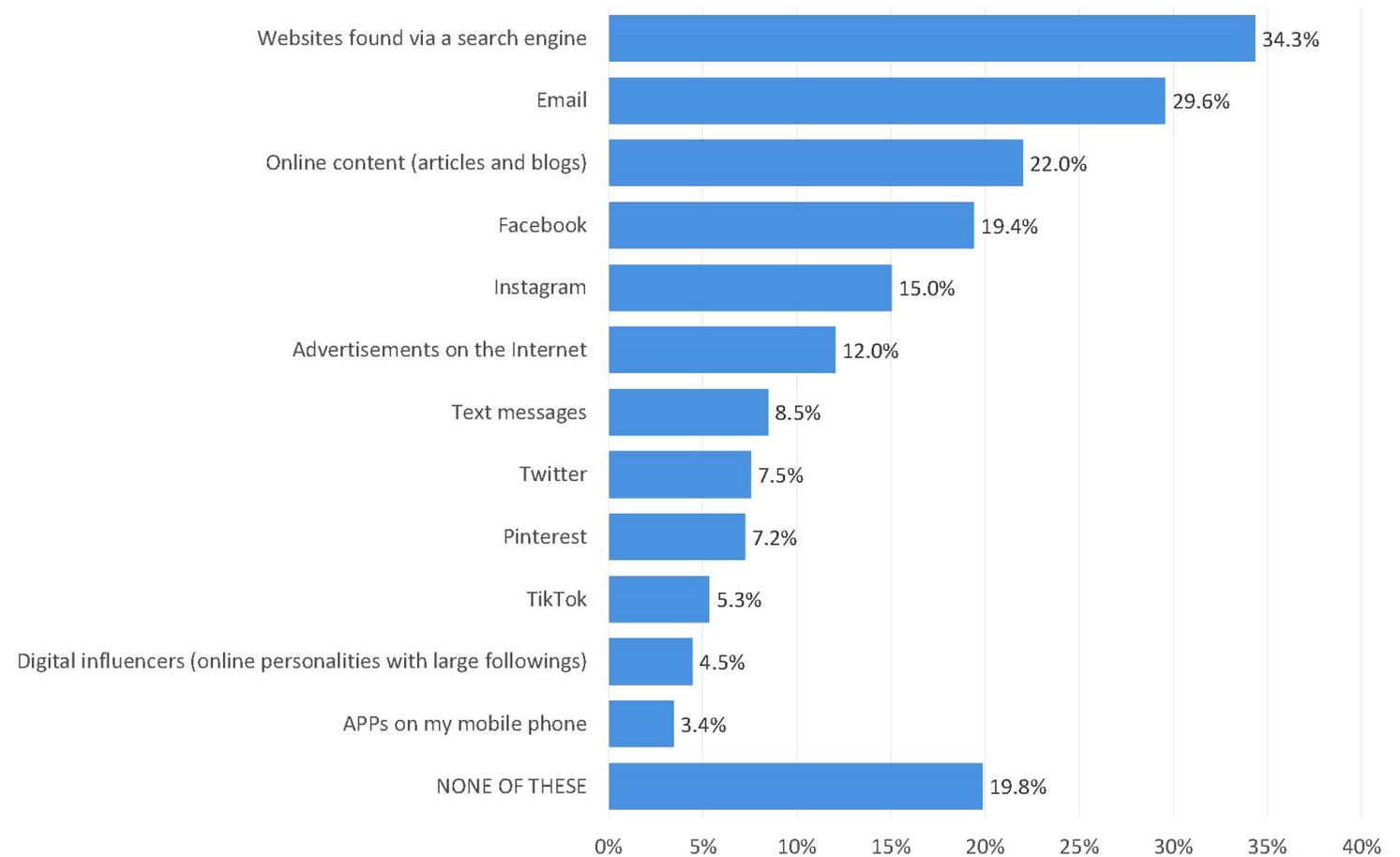
Almost two-thirds of consumers (64%) are using streaming services MORE than before the outbreak



Best Channels to Reach Travelers

Question: Please think about how travel destinations could best reach you with their messages right now. Where would you generally be **MOST RECEPTIVE** to learning about new destinations to visit? (Please select all that apply)

(Base: Wave 19 data. All respondents, 1,200 completed surveys. Data collected July 17-19, 2020)



Target Media Consumption

Media Channel	Usage	Usage Highlights
 <p>Digital</p>	Heavy	<ul style="list-style-type: none"> Spends on avg. 28 hours per week online and considers it it's most trusted media source (141 Index)
 <p>OTT / Streaming</p>	Heavy	<ul style="list-style-type: none"> Prefers subscribing to streaming video services because it's worth the money (181 Index) and enjoys their original programming (158 Index) Amazon Prime is their top streaming service used in the past 30 days (174 Index)
 <p>Outdoor</p>	Moderate to Heavy	<ul style="list-style-type: none"> 3rd highest medium against the target and notice large formats like Billboards Able to amplify awareness in select markets that have a high tendency of OOH
 <p>Radio</p>	Moderate to Light	<ul style="list-style-type: none"> Tunes in to terrestrial radio during the AM/PM drive on their commute to work (108 Index)
 <p>TV</p>	Light	<ul style="list-style-type: none"> Target's Linear TV consumption has drastically decreased and they are now light viewers (34 Index)

Media Marketplace Considerations

1

Increased demand and premiums:

- Due to COVID-19, many advertisers have pushed media to latter half of the year, resulting in higher demand and cost premiums
- A surge in demand due to the Holiday Season

2

Fall 2020 is a heavy **political season** due to the Presidential election, which will drive-up local premiums

3

Potential to **leverage paid media** buys to help secure and connect **with earned media**



Media Plan

OTT

- To reflect the evolution of the target's media consumption, leverage OTT to take advantage of this increase in our post-COVID world
- Reach the top feeder markets by working with local OTT partners that will hone-in on the target and engage audiences watching premium content from top-tier networks
- Sample of premium content
 - Entertainment- ABC, CBS, NBC and Roku
 - Sports- ESPN and Fox Sports
 - Lifestyle- A+E, Discovery, Food Network, HGTV and National Geographic



Video & Display

Sustain messaging against the target by utilizing video and display to granularly reach users cross-device (desktop, mobile/tablet) with 3rd Party targeting:

- Travel habits
- Demo (age, HHI)
- Environmentally conscious
- Geography
- Contextual

Considered List

Los Angeles Times



The Seattle Times



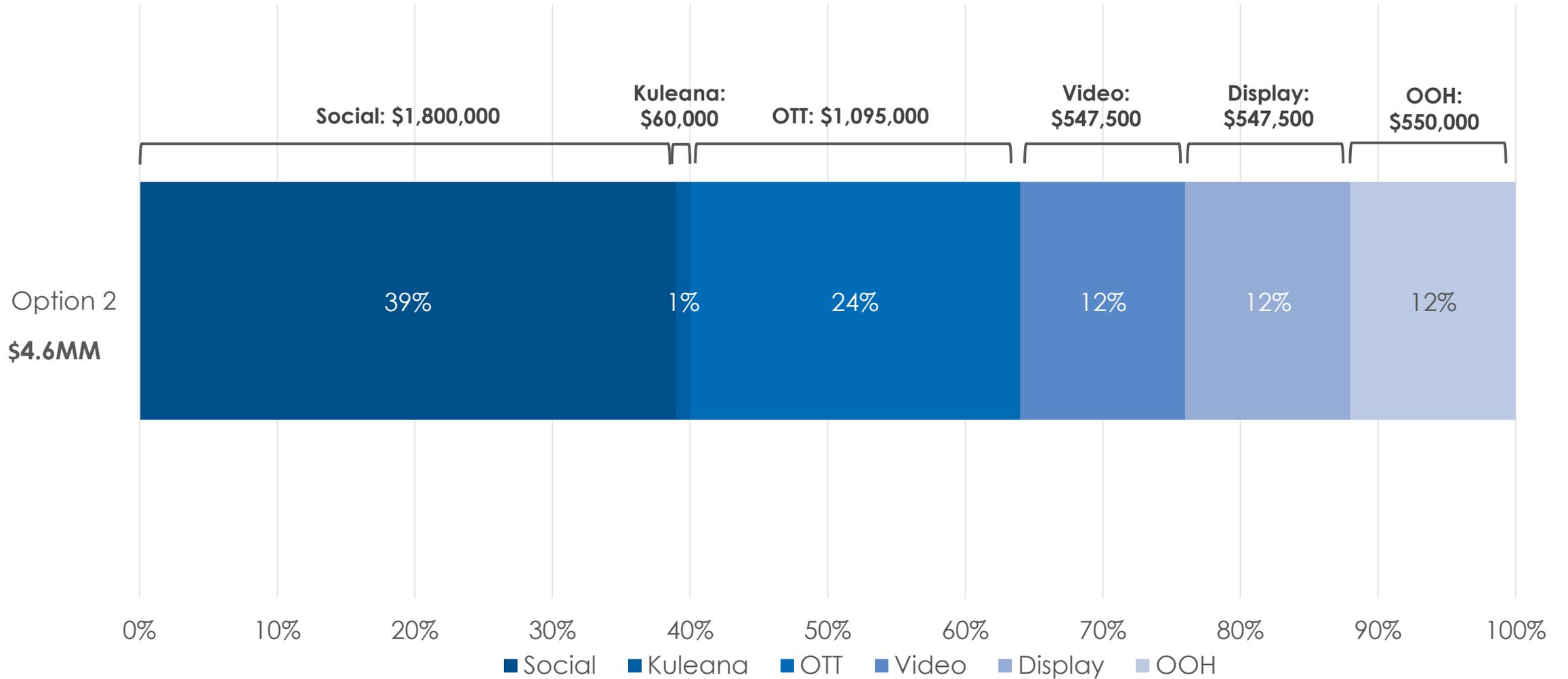
Digital Out-of-Home (DOOH)

- As market conditions evolve, consider DOOH coverage in the largest feeder market, Los Angeles
 - Concentrate efforts to create the most impact and generate mass awareness
- Strategically select premium DOOH units located in high-profile and high-traffic areas building excitement among travel enthusiasts
- Utilize DOOH formats for their dynamic message delivery and ability to rotate multiple creative messages



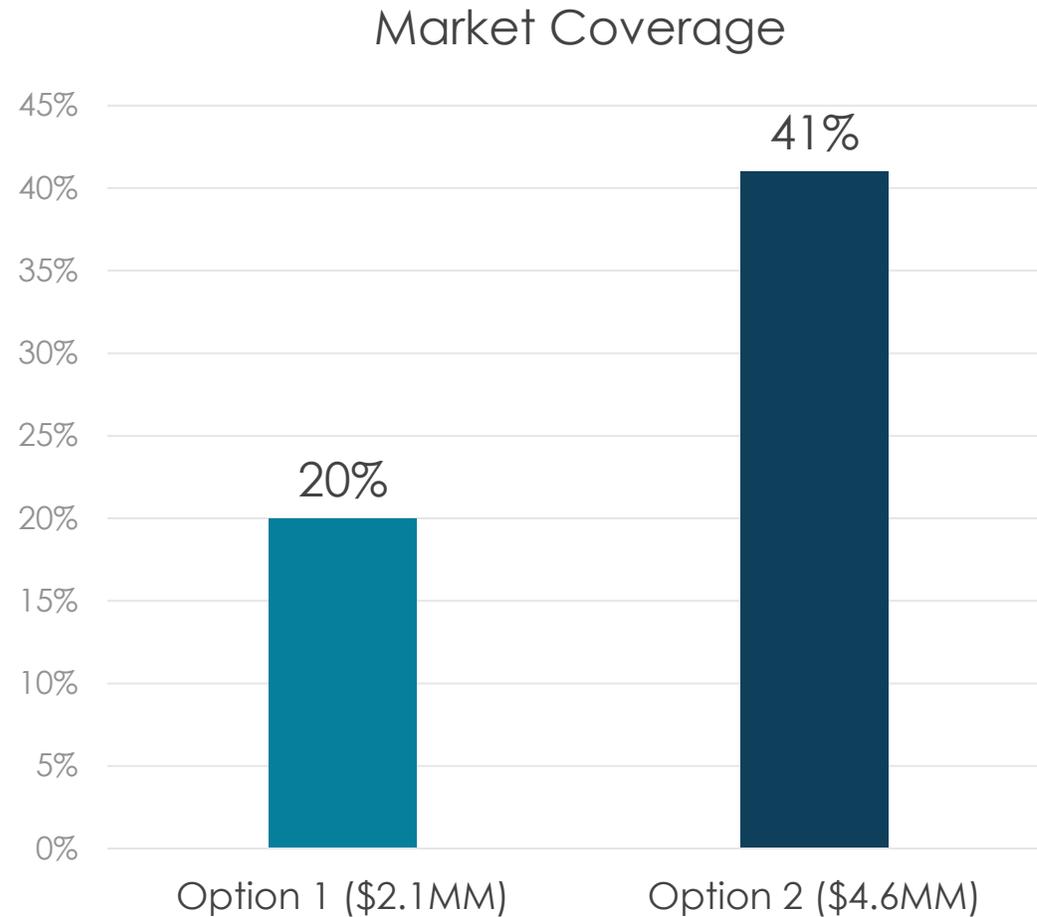
Example: The Grove Shopping Mall Digital Wall

Channel Mix



Market Coverage

Additional funds will garner
an estimated **↑ 21%**
increase in market coverage





Meetings, Conventions & Incentives

Meetings, Conventions & Incentives

Hawaii MCI Marketing Campaign

- Develop "New Hawai'i" MCI Blueprint
 - Detailed Health & Safety Protocols for all MCI Venues
- Promote the MCI Customer and Meeting Attendee Journey
- Develop digital sales tools for the team to drive business during Covid-19
- Redevelop MeetHawaii.com to efficiently increase productivity
- Create an updated library of still and video imagery



An aerial photograph of a vast, lush green mountain range. The terrain is characterized by numerous ridges and valleys, all covered in dense, vibrant green vegetation. The perspective is from a high vantage point, looking down and across the landscape. The sky is a pale, hazy blue, suggesting a clear but slightly misty day. The overall mood is serene and majestic. The word "Mahalo" is centered in the middle of the image in a clean, white, sans-serif font.

Mahalo

Agenda Item #10:

Update Relating to HTJ's
Recovery Plan and What Has
Been Implemented



Recovery Plan
~ Japan Market ~

July 29, 2020

Japan Market Current Situation

Japan's COVID-19 Case

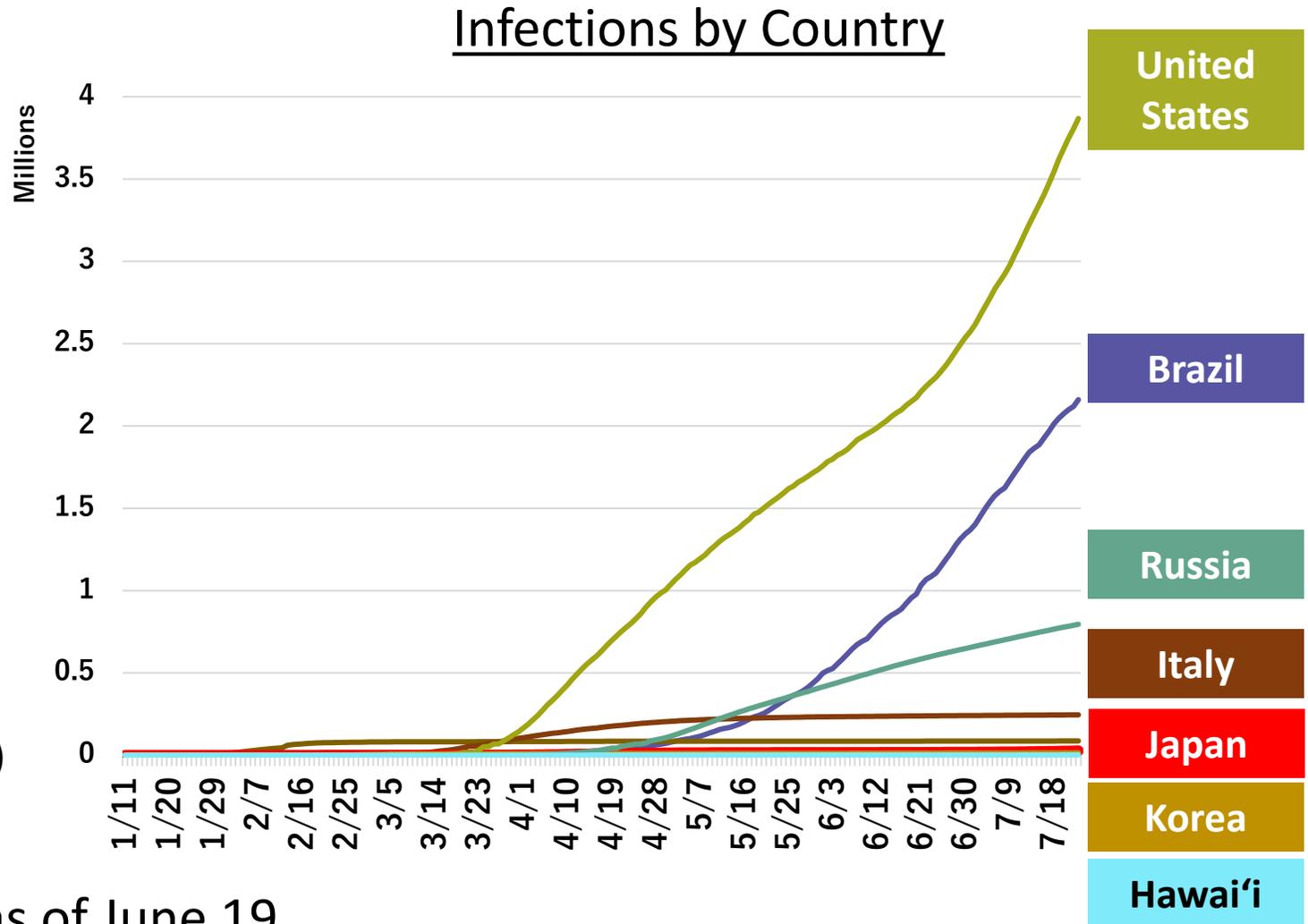
- Total Case: **27,029**
- Death: **990**
- Case by the Area
 - Hokkaido: 1,371
 - Kanto*: 15,944
 - Aichi: 869
 - Kinki**: 4,308
 - Fukuoka: 1,240

*Kanto (Tokyo, Chiba, Kanagawa & Saitama)

**Kansai (Osaka, Hyogo & Kyoto)

- All restrictions lifted in Japan as of June 19

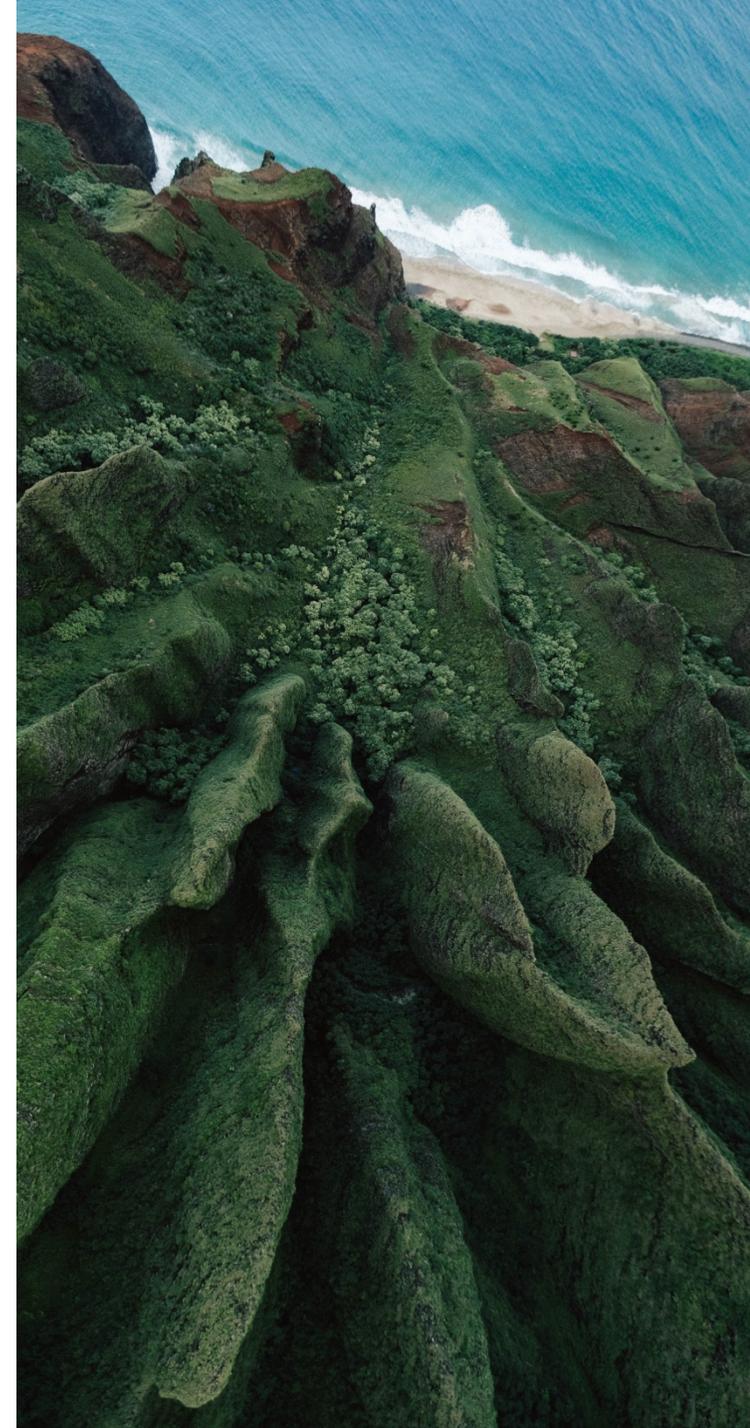
*Case number as of 7/23



Source: World Health Organization

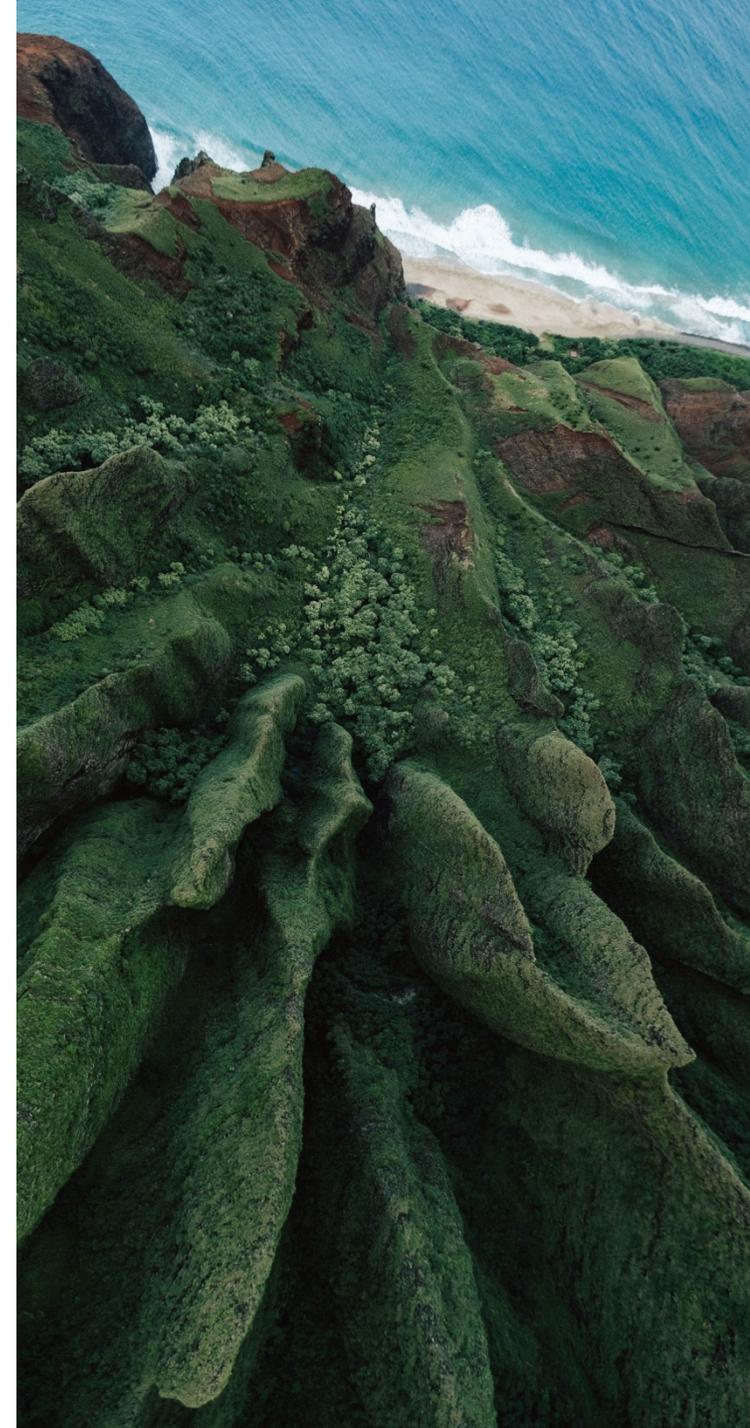
Japanese Economy

- Government officially announces economic expansion to have ended in October 2018
- Recession has shown signs of bottoming out as consumption shows signs to recover
- Unemployment rates rose to 2.9% in May, recording three consecutive months of growth
- Economists predict the economy to contract 5.3% in fiscal year 2020
- The global economic decline is prompting growth in consumers' marginal propensity to save (6.6% in Q4 2019 > 8.1% in Q1 2020 > 8.9% in Q2 2020)



Japanese Market Conditions

- Studies by JTB Corporation show that close to 70% of consumers showed interest for travels after COVID-19 subsides
- Most direct flight services canceled through August
- The rise of cases in Tokyo has prompted exclusion of trips to Tokyo from the Go To Travel campaign
- The government has begun discussions with various countries to reopen international borders
- The government is looking to construct PCR testing centers within the 3 major airports (Haneda, Narita and Kansai), along with inside metropolitan cities of Osaka and Tokyo

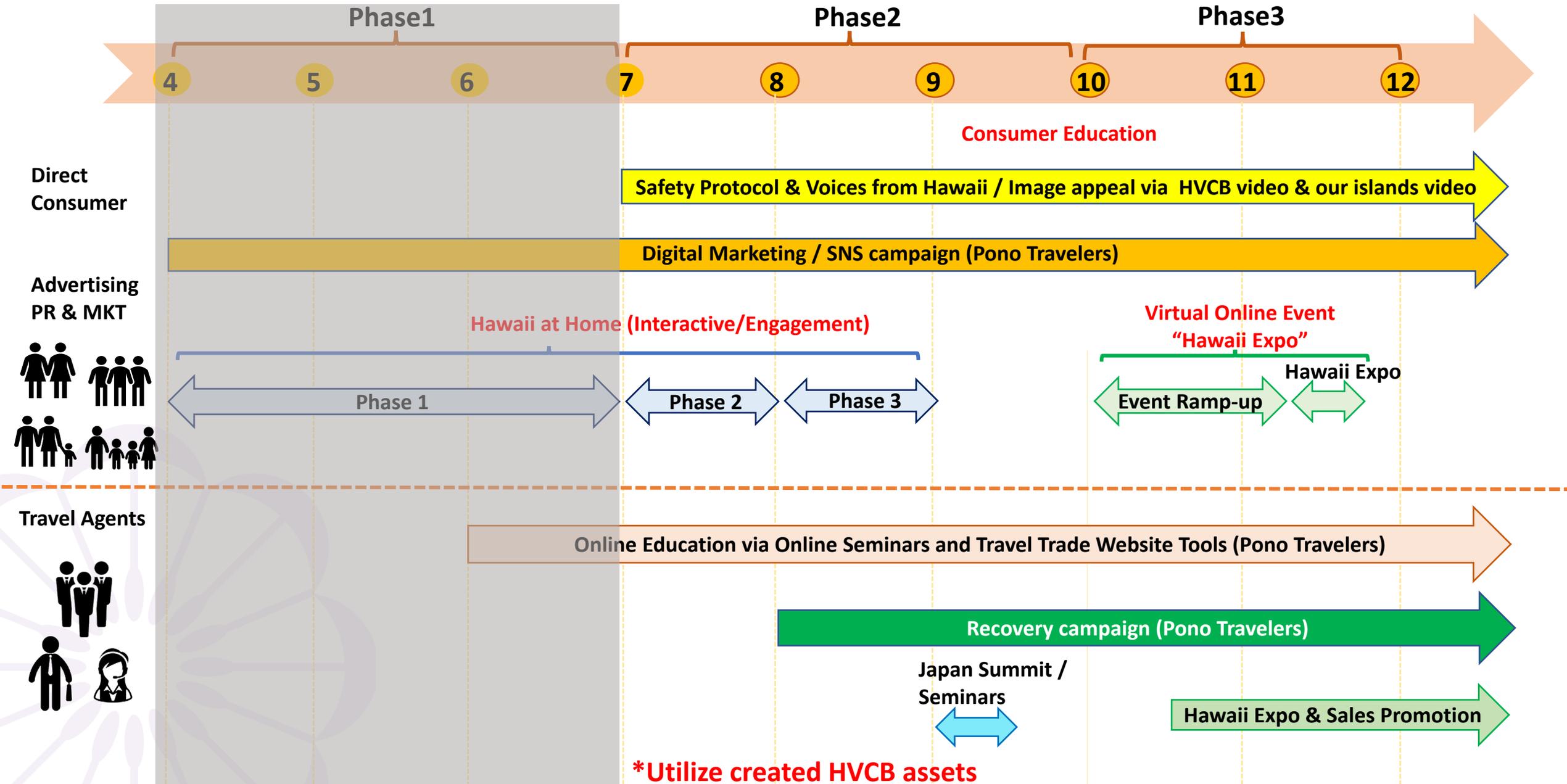


The background is a dark green color with several bright, glowing green light streaks that curve across the frame from the bottom right towards the top left, creating a sense of motion and energy.

Japan Market Recovery Plan

3 Phases

Overview



Travel Trade Initiatives

HTJ 2020 Activities (April – December)

Phase 1 April - June

- Industry Hearings

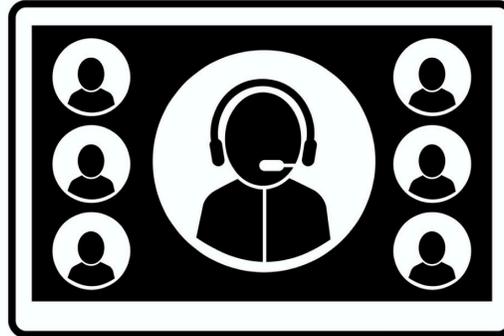


- Stakeholder Communication
- Development of TT Education materials
- Spread “Hawaii at Home” via owned media



Phase 2 June – August (Pono Travelers)

- Online Education & Training



- Stakeholder Communication (New Normal)
- Satellite office Initiatives/Support



Phase 3 August to December (Pono Travelers)

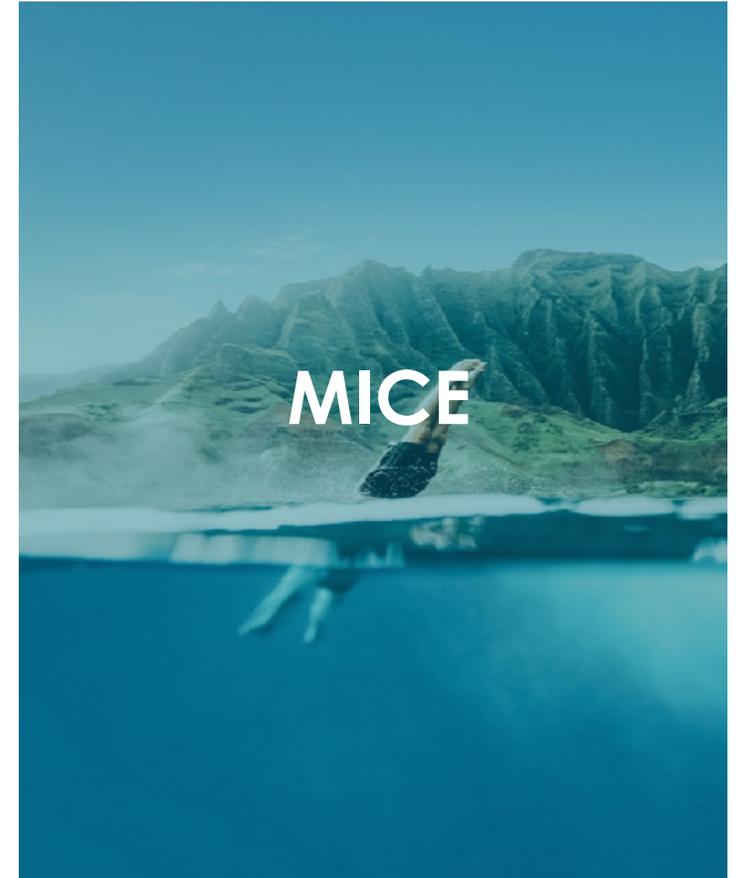
- Continue Online Training



- Real Seminars Upon Request
- Online Seminar & Japan Summit
- Airline & Wholesaler Coops

Additional Initiatives Proposal

Initiatives



Safety Protocols and Procedures to be distributed throughout

Advertising (1 mil)

- Outdoor AD



- Digital AD



- SNS AD



Airline/Wholesaler COOP (750K)

- Newspaper Coop AD



- TV Media Tie-up Coop



- Direct EDM Campaign using mileage members database

MICE (250K)

- Gov, Mayor, HTA message video specific to MICE production



- Group booking incentive: on-island ad-value incentives (ie: entertainment, event coordination, transportation etc.)



Safety Protocols and Procedures to be distributed throughout

A scenic view of a waterfall cascading down a rocky cliff into a pool of water, surrounded by lush greenery. The waterfall is the central focus, with white water falling from a dark, mossy rock face. The surrounding area is filled with dense, vibrant green plants and trees, creating a lush, natural setting. The overall atmosphere is serene and peaceful.

Mahalo