



Hawai'i Convention Center
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David Y. Ige
Governor

Chris Tatum
President and Chief Executive Officer

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

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

***Po'akolu, 26 'Aukake 2020, 1:00 p.m.
Wednesday, August 26th 2020 at 1:00 p.m.***

***Hālāwai Kikoho'e
VIRTUAL MEETING***

*Hiki i ka lehulehu ke hālāwai pū ma o ka ZOOM.
E leka uila mai iā ariana@gohta.net, he iwakāluakūmāhā hola ma mua o ka hālāwai ka lohi loa,
a nāna nō e leka uila aku i ka loulou ho'okāinoa.*

Teleconferencing will be live streaming via ZOOM.

Public is invited to register to participate through ZOOM:

**Email ariana.kwan@gohta.net no later than 24 hours prior to the meeting and a
ZOOM Invitation will be emailed to you.**

***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 July 29th, 2020 HTA Marketing Standing Committee Meeting
3. *Hō'ike No Ko HTO Papahana Ho'omōhala Hou A Papahana Hokona*
Presentation of Oceania GMT on the Recovery for 2020 and Brand Marketing Plan for 2021. Presenter is Darragh Walshe / HTO – New Zealand Country Manager will be presenting current events for Australia and New Zealand along with how to recover tourism into Hawai'i
4. *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 Hawai'i
5. *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



6. *Hō'ike No Ko HTJ 'Ōnaehana Palekana*
Presentation of HTJ by Eric Takahata / Managing Director of their newly created Safety Protocol Video for the Japanese consumers and travel trade
7. *Hō'ike No Ko HVCB Ka'akālai Pāpaho Hou*
Presentation of HVCB Jay Talwar / Sr. VP & CMO of the newly updated video, social media messages and media strategy
8. *Hō'ike A 'Āpono I Ka Ho'okumu I 'Aha Kūkā He'enalu A Hoe Wa'a*
Presentation and approval of establishing a Surfing & Canoe Paddling Advisory Group. Kalani Kaanaana to present recommendations for the Advisory Group Members followed by discussions of this Advisory Group Members responsibilities in this leadership role. Once approved by the Marketing Standing Committee, will seek approval from the Regular Board Members on 7/30/20
9. Ho'oku'u
Adjournment

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

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

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

Members of the public are invited to view the public meeting and provide written testimony on any agenda item. Written testimony may be submitted prior to the meeting to the HTA by email to ariana.kwan@gohta.net; 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
July 29th, 2020
HTA Marketing Standing
Committee Meeting



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**MARKETING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY
Wednesday, July 29, 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, Sherry Menor-McNamara, and Benjamin Rafter
HTA BOARD MEMBER PRESENT:	Richard Fried
HTA STAFF PRESENT:	Chris Tatum, Keith Regan, Pattie Herman, Marc Togashi, Kalani Ka'anā'anā, Jennifer Chun, and Ariana Kwan
GUESTS:	Senator Glenn Wakai, Mufi Hannemann, Eric Takahata, Avi Mannis, Amy Terada, Jay Talwar, Darragh Walshe, Susan Webb, Lorenzo Campos, Irene Lee, and Liz You
LEGAL COUNSEL:	Gregg Kinkley

1. Call to Order:

Chair Kelly Sanders called the meeting to order at 1:08 PM. Kalani Ka'anā'anā, HTA Director of Hawaiian Cultural Affairs and Natural Resources, opened the meeting with a pule.

2. Approval of Minutes of the June 24, 2020 HTA Marketing Standing Committee Meeting:

Chair Sanders requested a motion to approve the minutes of the June 24, 2020 HTA Marketing Standing Committee meeting. George Kam made a motion, which was seconded by Fred Atkins. The motion was unanimously approved.

3. Presentation and Discussion of Hotel Readiness for when Hawai'i Opens Up to Visitors:

Chair Sanders recognized Mufi Hannemann, President and CEO of the Hawai'i Lodging and Tourism Association (HLTA), to present and discuss hotel industry readiness when Hawai'i reopens to visitors. Mr. Hannemann said it became clear in the early stages of the COVID-19

pandemic that the visitor industry would need to develop hygiene standards in hotels statewide. He noted that there are two types of hotels, labor affiliated and non-labor affiliated, both of which were represented at HLTA's "We are Ready" Day on July 23, 2020. The purpose of this event was to unveil the safety measures in place at the Outrigger Waikiki Beach Resort, Alohilani Resort, and Hilton Hawaiian Village and to show that Hawai'i's resorts are ready for visitors to return to Hawai'i. Mr. Hannemann played a video recap of "We are Ready" Day. He noted that Senator Glenn Wakai, Representative Daniel Holt, Councilmember Ann Kobayashi, and the staff of Councilmember Tommy Waters were among those who toured the resorts. Mr. Hannemann added that there will be additional touring days with other resorts on O'ahu, Maui, Kaua'i, and Hawai'i Island. He explained that this represents a statewide effort by the hotel industry to adopt standards vetted by Governor David Ige, the Department of Health, the Office of the Attorney General, and the four county mayors. Mr. Hannemann noted that some resorts have elected to institute even more stringent measures to ensure the safety of their guests and employees. He said there are three aspects to the safety measures in place: (1) Mākaukau (Preparation), (2) Hana Pono (Proper Procedures), and (3) Pane (Answer). Mākaukau refers to the preparations to resume business, which include mandatory employee training programs and the establishment of social distancing standards. Hana Pono refers to standard operating procedures which include the establishment and display of comprehensive sanitization practices for all common areas, guest rooms, and staff areas. Pane refers to the resort response to possible COVID-19 cases which include guests who arrive with a pre-test and those who do not. Mr. Hannemann explained that guests who do not provide a negative pre-test or are awaiting results will receive a single-use guest room key and must quarantine until 14 days have elapsed or until they receive a negative test. He added that law enforcement will be notified if guests violate their quarantine. Mr. Hannemann said that if a guest falls ill while staying at the hotel, the guest will be isolated and asked not to leave the hotel. He noted that the hotel will establish internal policies to set aside a part of the hotel should this occur. Mr. Hannemann emphasized that the hotel industry is ready for visitors to return to Hawai'i, and the goal is to restore trust because he understands that there are concerns about Hawai'i's reopening.

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

Chair Sanders recognized Eric Takahata, the Managing Director of Hawai'i Tourism Japan (HTJ), to present on the implementation of HTJ's recovery plan. Mr. Takahata said Japan and Hawai'i both have low numbers of confirmed cases compared to other destinations. He noted that the Japanese economy is not doing well and that tourism is a large part of their economy. Mr. Takahata said Gov. Ige is working hard to establish a travel agreement between Hawai'i and Japan to restart the visitor industry. Mr. Takahata noted that HTJ is on track with the implementation of its recovery plan. He added that there are still no direct flights to Hawai'i from Japan, but there are reports of Japanese travelers arriving in Hawai'i through connecting flights from Los Angeles who then undergo the 14-day quarantine. Mr. Takahata said the recovery plan is entering Phase 2, and the travel trade industry is eager and ready to restart the visitor industry. He noted that there is a high demand for travel to

Hawai'i and JAL flights are resuming in late August. He reported that inquiries for MICE groups are beginning to rise. Mr. Takahata said that with the available budget, HTJ will continue to advertise in the Japanese market. He noted that competing destinations like Guam and Australia have extensive safety protocol and procedure videos circulating in the Japanese market in anticipation of an increase in tourist travel.

Chair Sanders said HIS and ANA both announced that they would not resume travel packages to Hawaii until September 15, 2020. Chair Sanders asked how long the delay would be between the resumption of travel companies selling packages and the resumption of operations with the assumption that Hawai'i reopens on September 1, 2020. Mr. Takahata responded that the tour companies would require 3 to 4 weeks to renegotiate prices with the airlines and hotels before resuming operations. He added that it is still unknown whether Gov. Ige will abide by the September 1st reopening date. Mr. Sanders asked that if September 1st remains the reopening date, should Hawai'i expect to see more Japanese tourists returning in early October. Mr. Takahata responded that the airlines and tour companies would be ready for initial business to trickle in. However, he anticipates the initial people traveling from Japan will include essential workers, international students, and Japanese nationals who own property in Hawai'i.

Kyoko Kimura asked for clarification regarding a number of news releases stating that Hawai'i would be included on a list of accepted international travel destinations for Japan. Mr. Takahata responded that Hawaii will be considered as an accepted international destination along with the 12 other countries on the list. He noted that Hawai'i is the only state from the U.S. included on that list and that Gov. Ige has been working towards a travel arrangement with Japan. Mr. Takahata expressed his appreciation to the Japanese government for considering Hawai'i as a possible accepted destination.

Mr. Atkins asked about the safety procedures in place for the essential workers that may be traveling to Hawai'i. Mr. Takahata responded that it would not be a pre-test and that these travelers would be subject to the current safety protocol and would undergo the 14-day quarantine period.

Benjamin Rafter asked how many direct flights there would be between Hawai'i and Japan. Mr. Takahata responded that with the exception of the four JAL flights in August, no long term schedules have been announced or released. He noted that the airlines and travel companies only have been releasing schedules for two week periods.

5. Report of the Hawai'i Forward Looking Bookings, Global Agency Pro and YouGov:

Chair Sanders recognized Jennifer Chun, HTA Director of Tourism Research, to report on Hawai'i Forward Looking Bookings, Global Agency Pro, and YouGov. Ms. Chun reported that HTA subscribes to YouGov's Brand Index and Profiles for U.S., Japan, and Australia and that these index trends are published on a weekly basis on HTA's website. She noted that the Destination Indexes generally gauge how people feel about traveling to Hawai'i. Ms. Chun explained that the different types of indexes include: (1) Buzz, the net percentage of people

who heard something positive about Hawai'i, (2) Recommend, the net percentage of people who would recommend Hawai'i as travel destination, (3) Word of Mouth Exposure, the net percentage of people who talked with someone about Hawai'i, and (4) Consideration, the net percentage of people who would consider Hawai'i for their next trip. Ms. Chun explained how to read and interpret the Destination Indexes as contained in the Committee packet. She highlighted that travel sentiment remains high even though people are not necessarily traveling to Hawai'i at the moment. Ms. Chun noted that there were dips when the quarantine and then subsequently the reopening delay were announced. She said Marisa Yamane, HTA Director of Communications and Public Relations, receives emails every day about people wanting to return to Hawai'i. Ms. Chun discussed the different trends in the destination indexes regarding U.S., Japan, and Australia as contained in the Committee packet.

Ms. Chun reported that HTA subscribes to Global Agency Pro, an online travel distribution system that provides access to over 90% of the world's travel agency airline transactions. She noted that these statistics are published in HTA's daily briefings. Ms. Chun discussed travel agency bookings as contained in the Committee packet. She highlighted that net bookings between 2019 and 2020 are negative, which means that people are canceling their trips. She highlighted that bookings for future travel is lower compared to 2019, but that the general increases and decreases are similar to 2020. Ms. Chun noted that the booking indexes are measurable by island.

6. Presentation and Discussion of Airline Readiness for When Hawai'i Opens Up to Visitors:

Chair Sanders recognized Avi Mannis, Senior Vice President of Marketing for Hawaiian Airlines, to present and discuss the airline industry's readiness for Hawai'i's reopening. Mr. Mannis said safety measures instituted by all major airlines are aligned and was precipitated by a great deal of collaboration across the industry. He noted that a great deal of work has been done on cleaning and sterilization of aircraft in between uses. Mr. Mannis said there has been an increased focus on passenger's wearing masks and protective equipment for employees. He noted that all major airlines have made substantial changes to their in-flight services and at airports by reducing unnecessary contact and maximizing the physical distance between passengers and employees. He noted that even in close quarters, aircrafts are a safe place with air filtration systems, proper cleaning, and mask compliance. Mr. Mannis said new measures and issues have arisen since his last presentation. He highlighted that the enforcement of mask wearing is critical, and the airline industry has taken an aggressive stance towards mask wearing on board flights, such as policies in which non-compliance with mask-wearing policies has the consequence of a ban from flying during the course of the pandemic. He noted that people in Hawai'i have been responsible in complying with Hawaiian Airlines' mask wearing requirement. Mr. Mannis added that medical exemption policies have been established for people who cannot wear masks for legitimate medical reasons. Those people must undergo additional screening to verify said medical reason. Mr. Mannis said passengers are required to complete a health attestation form prior to check-in. He explained that when a passenger checks in, that passenger

attests that he or she does not have any symptoms or an elevated temperature and is willing to comply with mask wearing policies. Mr. Mannis added that this attestation is on a separate screen during the check-in process. He noted that Hawaiian Airlines is running a pilot program in which it assists with temperature screening from U.S. mainland destinations. He expressed that long-term, temperature screening is a measure best managed by state safety officials, but the industry is willing to step up and fill that role in the meantime. Mr. Mannis said airlines are exploring novel technology and alternative forms of sanitation such as ultraviolet light and anti-viral polishes that last for a long period of time. He noted that Hawaiian Airlines is working collaboratively with the airline industry, health professionals, and manufacturers to keep passengers and employees as safe as possible. Mr. Mannis said that in recent months, Hawaiian Airlines has been sending emails and text messages to passengers with information about Hawai'i's safety protocol and procedures to reduce stress and conflict with screeners at airports. He noted that Hawaiian Airlines has also produced a number of what-to-expect videos and new TV commercials showing that Hawaiian Airlines is ready for Hawai'i's reopening. He added that Hawaiian Airlines has partnered with local businesses and has released a new series of content called "Travel Pono," which shows travelers what it is like to visit Hawai'i in the new normal and drive home the notion of personal responsibility.

Mr. Mannis said the industry as a whole saw a resurgence in air travel, and Hawaiian Airlines saw a steady increase in demand for neighbor island travel. He noted that Hawaiian Airlines reported a loss of \$175 million for the second quarter, which underscores the need for financial strength to withstand more quarters like this. Mr. Mannis said Hawaiian Airlines has access to new financing using its aircraft as collateral such that it now has up to \$1 billion in cash reserves. He noted that it will be a long road moving forward and that Hawaiian Airlines burns through about \$3 million in cash per day. Mr. Mannis said it is increasingly important to reduce costs to survive and that he expects Hawaiian Airlines to be 15 to 25% smaller by next summer. He noted that Hawaiian Airlines is expecting to furlough up to 2,000 contract employees and will manage the situation as sensitively as possible. Mr. Mannis said the measures that Hawaiian Airlines takes now will mitigate the severity and duration of the economic cliff it and all other airlines currently face. He added that the visitor industry as a whole needs to be focused on reopening the economy while keeping the community safe.

Mr. Atkins asked if these safety procedures and Travel Pono content are being communicated to the community so that people feel comfortable about visitors returning. Mr. Mannis responded that Hawaiian Airlines is using advertisements and its social media channels to communicate these messages to the local communities.

Sherry Menor-McNamara said that when she returned home to Hilo in June, she felt safe and it was a seamless process. She noted that each county has different guidelines and rules. Ms. Menor-McNamara asked whether Hawaiian Airlines plays a role in communicating these different guidelines to its passengers. Mr. Mannis responded that Hawaiian Airlines tries to do so. He noted that the procedures at the airports have been

consistent and well executed. Mr. Mannis said Hawaiian Airlines will continue to work with its counterparts at the Department of Transportation and communicate this information to its passengers.

Mr. Atkins asked if there is a correlation between downsizing workforce and reducing direct flights to Hawai'i. Mr. Mannis responded that the expectation is that as airlines become smaller, there will likely be a similar reduction in flight operations. Mr. Atkins asked how long it would take to increase the number of flights if business begins to improve. Mr. Mannis responded that it depends on how long the downturn lasts. If the downturn is brief, the return will be swift. However, if the downturn is longer, more work will need to be done to train employees as they return to work and provide maintenance to aircrafts.

Pattie Herman, HTA Vice President of Marketing and Product Development, asked if there are still social distancing measures on Hawaiian Airlines' flights. Mr. Mannis responded that they have continued to cap load factors at 70% by leaving vacant seats and that these measures are in place through September. He noted that the airline industry is studying how effective social distancing measures are given mask wearing policies and the economic reality of being able to operate with lower load capacities. Mr. Mannis said he does not expect it to be a permanent measure, but Hawaiian Airlines will continue to do so as long as it provides confidence to travelers.

Chris Tatum, HTA President and CEO, commended Hawaiian Airlines for its engagement in the process of making it safer to travel. He thanked Hawaiian Airlines for its support and efforts because 7,500 Hawaiian Airlines employees are members of the local community. Mr. Tatum expressed that HTA will do what it can to support Hawaiian Airlines.

7. Presentation and Discussion of Wholesale/Travel Agent Readiness for when Hawai'i Opens Up to Visitors:

Chair Sanders recognized Amy Terada, Vice President of Marketing for Pleasant Holidays, to present on wholesale and travel agent readiness when Hawai'i reopens. Ms. Terada presented a brief overview of Pleasant Holiday's company history. She highlighted that the bulk of their business is through travel agents. Ms. Terada recapped a timeline of COVID-19 travel-related events. She noted that pre-COVID-19, travel to Hawai'i was trending upward by almost 20%. Ms. Terada said she started to see positive trends in daily TSA checkpoint passengers entering July, but it did not materialize due to the rising case numbers nationwide. Ms. Terada said Phase 1 of Pleasant Holiday's recovery efforts began in March. She said Pleasant Holidays supported cancellations and rebookings. She noted that they offered incentives to travelers to postpone their trips as opposed to canceling outright. She added that Pleasant Holidays continued to provide information and travel advisories. Ms. Terada said they entered Phase 2 of their recovery plan in April, during which time they tried to tap into people's desire to travel when stay-at-home orders are lifted. She noted that Pleasant Holidays wanted to encourage confidence and flexibility with cancel-for-any-reason travel protections plans. Ms. Terada said Pleasant Holidays entered Phase 3 of its recovery plan in May, during which time they invested heavily in digital marketing after

Gov. Ige announced the original August 1st reopening date. She noted that Pleasant Holidays saw an initial spike in demand, but that demand tapered off as COVID-19 cases began to spike on the U.S. mainland.

Ms. Terada said Pleasant Holidays has created a new portal on its website to provide timely and relevant information to travelers for the purpose of building trust and confidence. She discussed travel protection plan trends and highlighted a dramatic increase in the purchase of plans that provide minimum risk in booking and maximum flexibility. Ms. Terada said Pleasant Holidays offers a \$99 cancel-for-any-reason travel plan that offers future credit for rebooking through 2021. Ms. Terada explained that Hawai'i significantly lags behind all other major destinations except for Europe. She then discussed the reasons why the Tahiti industry recovery has been so successful. Ms. Terada said more travelers are moving trips beyond September due to the lack of confidence that they will be able to travel. Ms. Terada noted that less than 50% of activity vendors are operating. She shared that travelers want to know what to expect when they arrive in Hawai'i, and the answers are not available because safety procedures have not been finalized. However, Ms. Terada expressed optimism for Hawai'i's recovery.

Chair Sanders asked what customers are telling their travel agents in regard to Hawai'i's pre-test policy. Ms. Terada responded that there are mixed results because it is becoming more of a challenge to get tested without showing symptoms, and the results take longer than 72 hours.

8. Presentation and Discussion of Establishing a Surfing & Canoe Paddling Advisory Group to the HTA Board of Directors:

Chair Sanders recognized Senator Glenn Wakai to present and discuss establishing a Surfing and Canoe Paddling Advisory Group. Sen. Wakai said the surfing industry is worth over \$50 billion a year globally. He noted that two events will enhance global interest in surfing: the Tokyo Olympics and the Michelob ULTRA Pure Gold Rumble at the Ranch surfing competition in Fresno. Sen. Wakai said surfing is deeply rooted in Hawaiian culture and noted that Hawai'i does not even have a surfing museum. He expressed his desire to establish an advisory group to nurture children, promote marine safety, and prevent climate change. Sen. Wakai noted that six U.S. states have surfing as a high school sport while Hawai'i does not. He expressed his desire to see an HTA advisory group work with the Department of Education (DOE) to establish surfing as a high school sport. Sen. Wakai said Hawai'i should have a global surfing brand with merchandise, professional events, and position Hawai'i to be the U.S. Olympic Team official training ground. He added that the World Surf League will both open its preseason and end the season in Hawai'i. Sen. Wakai expressed his desire that Hawai'i be the epicenter of the surfing world and does not want to lag behind California. He said the Legislature has tried and failed to establish a surfing commission and HTA may be the appropriate body to accomplish this goal.

Chair Sanders recognized Mr. Ka'anā'anā to present on how HTA can establish an advisory board. Mr. Ka'anā'anā said the HTA Board has the statutory authority to establish advisory

committees. He noted that such an advisory board would align with HTA's Branding, Community, Hawaiian Culture, and Natural Resources pillars.

Mr. Sanders expressed his support for the creation of an advisory group and asked if there would be a financial commitment. Mr. Ka'anā'anā responded in the negative. Mr. Sanders agreed with Sen. Wakai, noting that Hawai'i is the birthplace of surfing and it should be more of a focus.

Ms. Menor-McNamara expressed her support for the creation of an advisory group and asked how many members would be appropriate for the advisory board and from what backgrounds. Mr. Ka'anā'anā responded that 17 members would be appropriate and listed backgrounds from cultural, coastal environment, youth development, beach boys, surf lessons, film, art, literature, history, health and wellness, festival, retail, and science and technology, among others.

Mr. Atkins expressed his support for the creation of an advisory group and noted how beneficial it is for children, from a sporting and cultural perspective. Mr. Ka'anā'anā responded that canoe paddling and surfing are well aligned. He noted that currently, DOE does surfing as a club, and private schools compete nationally. He said the framework is already in place and can be developed. Mr. Ka'anā'anā raised the point that the advisory group would have limitations and would not influence policy on its own.

Ms. Kimura asked if the HTA Board can be members of the advisory group. Gregg Kinkley responded that he is not aware of any statutory prohibition, though noted that few people from HTA should be involved given that it is an advisory group.

Chair Sanders expressed his support to present this proposal to the HTA Board.

9. Review and Discussion of the Approved FY 2021 Budget Reflecting the Changes Approved in June by the Full Board to Address the TAT Allocation Shortfall:

Chair Sanders recognized Mr. Tatum to review and discuss the approved FY 2021 budget. Mr. Tatum said the Branding budget was not changed at the last HTA Board meeting, but there was discussion about how funding can be used to maximize opportunities for the HTJ and HVCB recovery programs. He noted that HVCB put aside \$3.8 million for its recovery campaign, but requested an additional \$2.5 million and another \$1 million for MCI. Mr. Tatum said the discussion centered on utilizing FY 2021 funds to supplement their recovery campaign budgets to ensure a successful relaunch with the intention of replenishing the budget should TAT allocations resume. Mr. Tatum said HTA is still waiting on Gov. Ige to release the \$5 million in emergency funds. Mr. Atkins asked if the emergency funds are included in the budget, to which Mr. Tatum responded in the affirmative. Mr. Atkins asked where the supplement would be pulled from. Mr. Tatum responded that it would be pulled from the U.S. line item in the Branding budget.

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

Mr. Kam recognized Jay Talwar, Senior Vice President and Chief Marketing Officer for HVCB, to present an update on the implementation of HVCB's recovery plan. Mr. Talwar discussed U.S. travel sentiment statistics as contained in the Committee packet and highlighted that U.S. travel sentiment remains low. He noted that the tourism recovery will start slowly, and many Americans likely will not get on a plane until 2021 because of health and safety reasons.

Mr. Talwar discussed the challenge of how to effectively communicate the safety measures in place for travel to Hawai'i, as well as communicating to local residents that these policies are in place so that residents are comfortable with Hawai'i's reopening. He noted residents most care about health and safety and perpetuating cultural and environmental sustainability. Mr. Talwar said people will be more willing to travel to places that are closer to home and that they are more familiar with. He noted that repeat visitors and respectful travelers will be the focus. Mr. Talwar said it is important to update the content on www.gohawaii.com with accurate information from the State and to coordinate this information with industry partners. He noted that HVCB is preparing content related to safety protocol and pono travel for all stages of travel from planning, pre-departure, in-flight, and arrival. Mr. Talwar said there will be a greater emphasis on earned media rather than paid media to work more efficiently as the budget tightens. He noted that there will be a greater emphasis on strengthening connections with the community so HVCB is aligned with how the community wants to share the islands with visitors. Mr. Talwar said the focus will be on the U.S. West Coast and national media outlets with a transition towards more digital media. He said the content will have two phases of messaging, the first of which will be sharing the health and safety protocol in place. Mr. Talwar added that the second phase of messaging will cover unique stories about the destination. He noted that there is a change in traveler sentiment in regard to being respectful travelers, which is aligned with resident sentiment. Mr. Talwar highlighted that programming on Netflix (Somebody Feed Phil) and PBS (Field Trip with Curtis Stone) will feature Hawai'i.

Mr. Talwar discussed HVCB's travel trade strategy. He said the focus will be on communication, providing training content, and partner marketing to ensure a consistent message. He added that HVCB will be hosting a Virtual Hawai'i Destination Expo scheduled for the fall. Mr. Talwar shared a visitor journey map that notes opportunities to interact with visitors with appropriate messaging, as well as protocols in place for each step along the traveler's journey, which are designed to provide confidence to travelers

Mr. Talwar discussed the "It's Time" messaging. He said the goal is to maintain brand integrity, dial up responsible traveler messaging, and share health and safety protocol. He added that messaging will be delivered both pre-arrival and post-arrival. He said HVCB will continue the "Rooted" campaign, in which cultural ambassadors share values and stories that will increase the depth of knowledge of visitors. Mr. Talwar said messaging will also focus on resorts and the importance of appropriate behavior in the community and in the environment. He added that the visitor target for the "Kuleana" campaign will be travelers who are looking to rejuvenate and are sensitive and responsible. Mr. Talwar played a

“Kuleana” sample video. Mr. Talwar discussed message delivery and noted that U.S. media consumption has evolved with increased consumption of over-the-top media, digital media, and streaming. He added that there has been an increase in advertising demands and premiums due to the holiday season and political election. He said there is potential to leverage paid media to secure and connect with earned media. Mr. Talwar discussed a breakdown of the budget. He said that with the current budget, major market coverage would be about 20%. He noted that with a supplement of \$2.5 million as requested, the market coverage would increase to 41%.

Mr. Talwar discussed a new blueprint for group travel, including health and safety protocol for group meetings across all venues statewide. He noted that the goal is to promote the attendee journey. He added that HVCB has introduced new sales tools for the sales team and has redeveloped www.meethawaii.com to increase productivity.

11. Adjournment:

The meeting adjourned at 3:23 PM.

Respectfully submitted,

Reyn S.P. Ono

Reyn S.P. Ono

Recorder

Agenda Item #3:

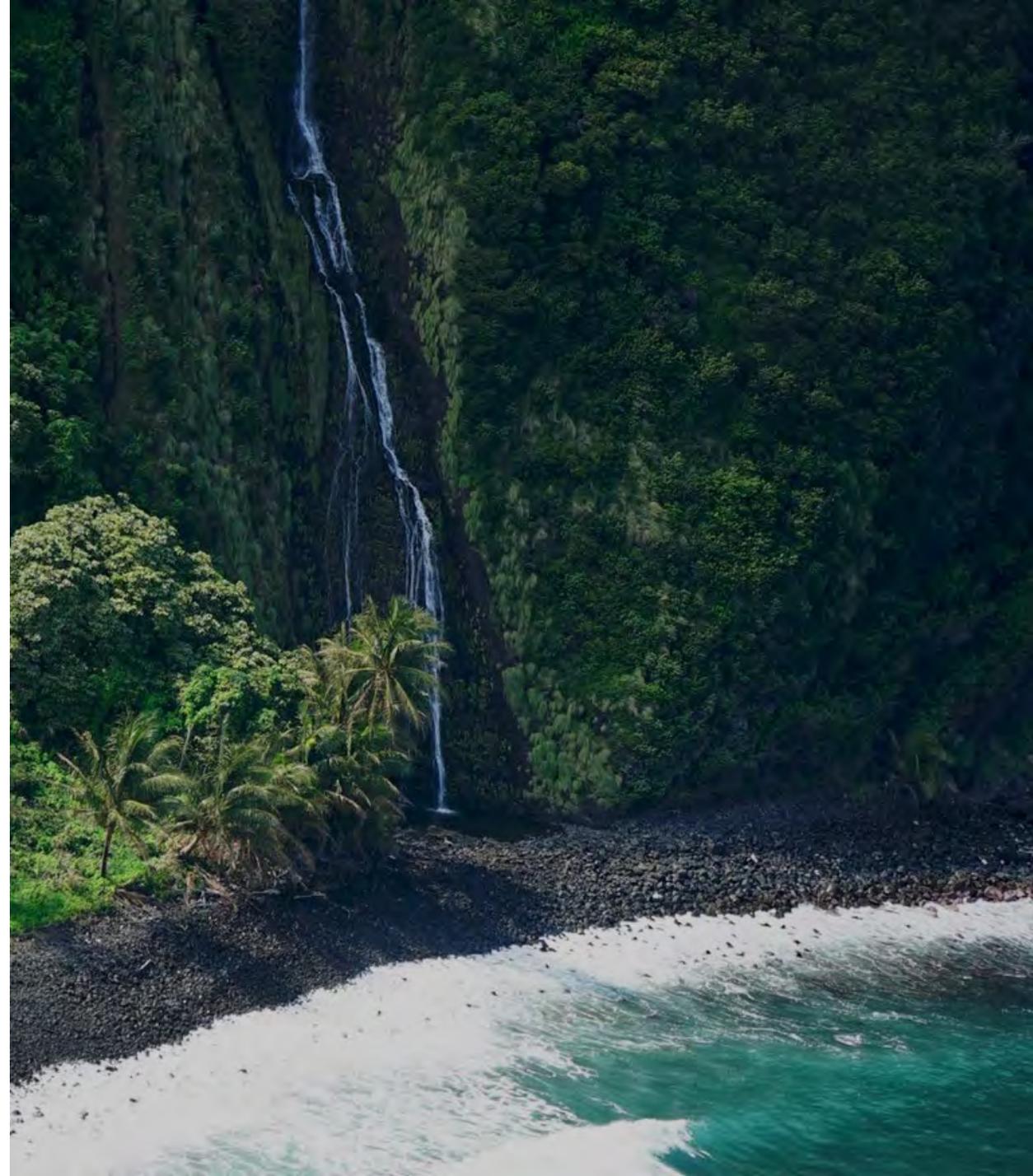
Presentation of Oceania GMT
on the Recovery for 2020 and
Brand Marketing Plan for 2021.

HTA Marketing Committee Meeting

August 26, 2020

Overview

1. Current Situation
2. Traveller Sentiment
3. Target Audience
4. Recovery Plan
5. Campaign Example



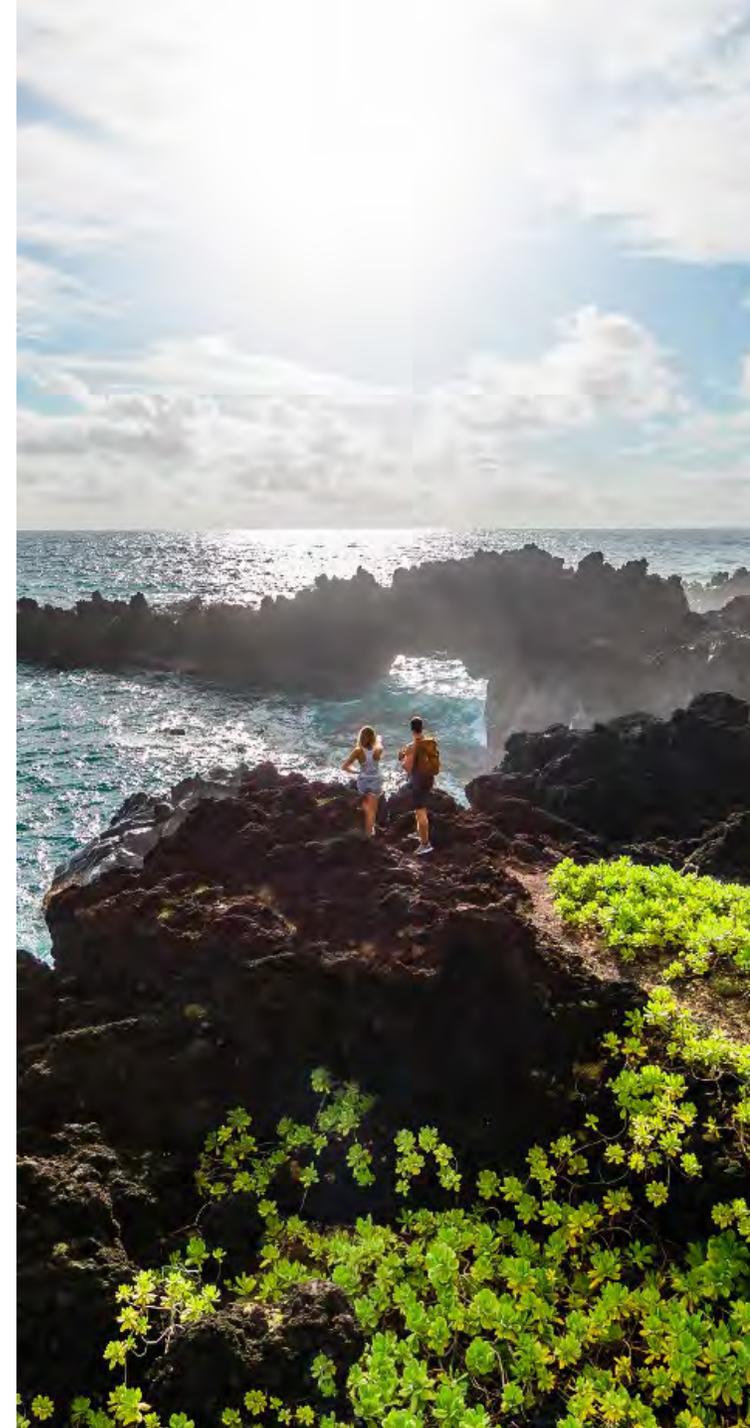
The background is a dark green gradient with several bright, glowing green light streaks that curve across the frame from the top right towards the bottom left. The streaks have a soft, ethereal quality, resembling light trails or aurora borealis.

Oceania Overview

Traveller sentiment

Current Situation

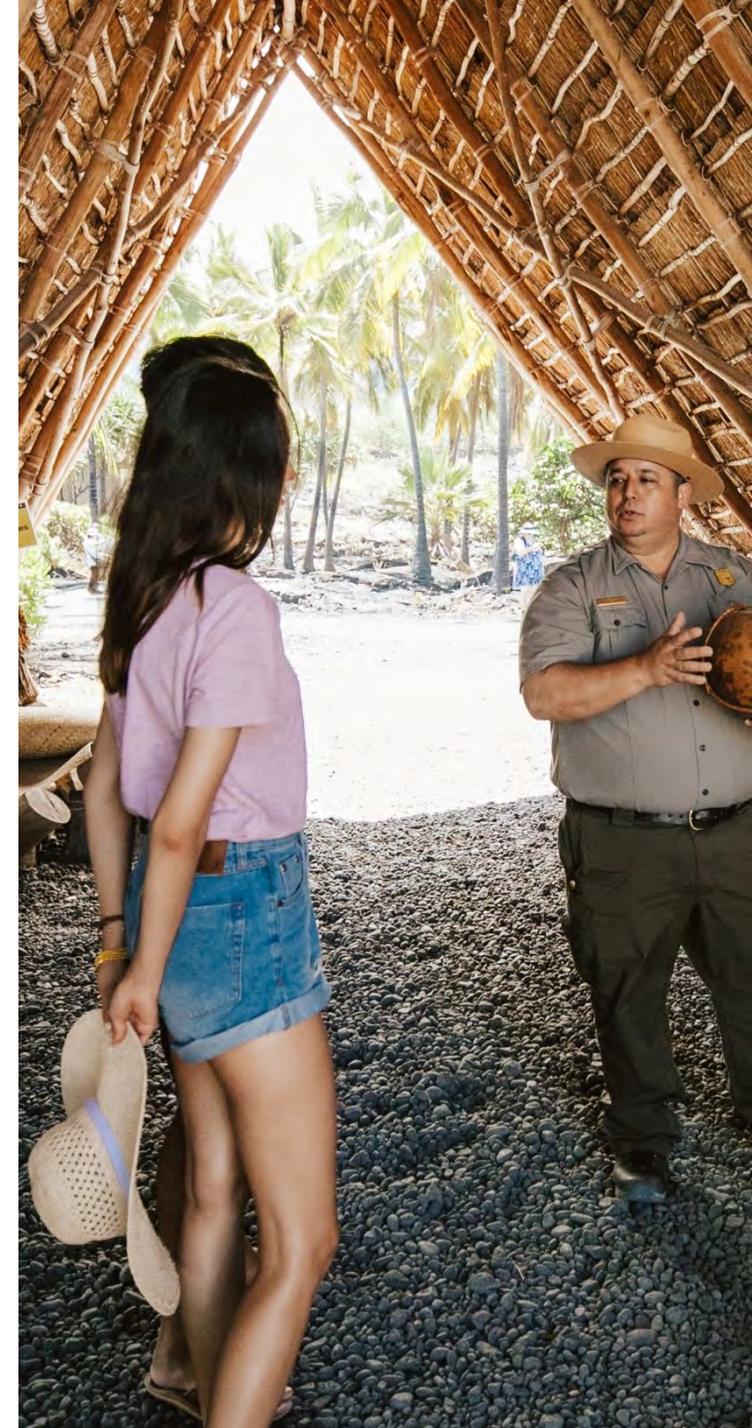
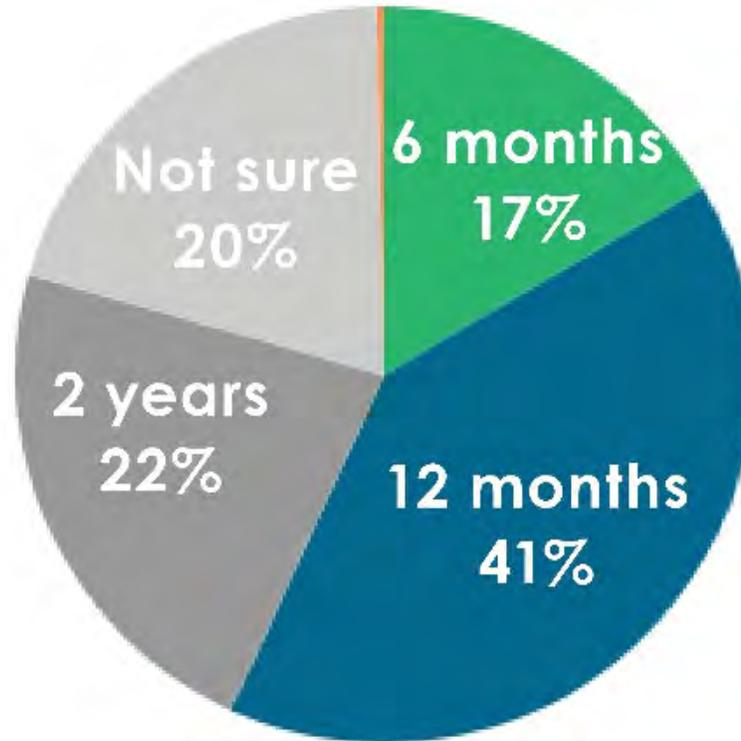
- Australia and New Zealand's international borders are closed for travel, except for limited repatriation flights.
- Delays with the start of a trans-Tasman bubble between Australia and New Zealand.
- Mid and long-haul international travel anticipated to resume in 2021 to government approved 'safe' countries.



HTO Traveller Sentiment Survey*

Timing of international travel

- 41% are planning an international leisure trip in the next 12 months
- 20% are not sure when they will travel overseas, reflecting the current uncertainty around when borders will reopen.



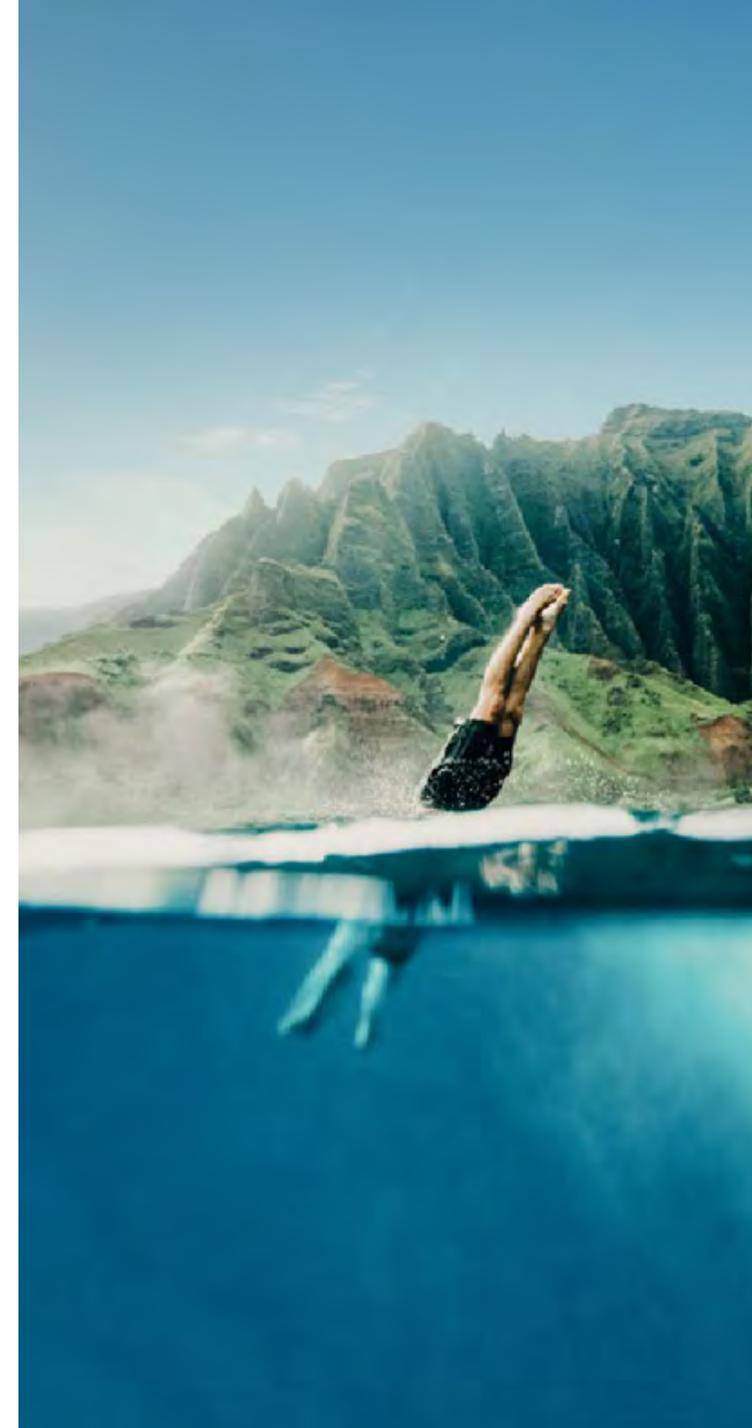
HTO Traveller Sentiment Survey*

Strong pool of loyal repeat visitors:

- Over two thirds have visited Hawai'i in the past 5 years
- 76% selected Hawai'i as their next international holiday preference

Market sentiment:

- The Oceania market is optimistic about resuming global travel – 20% of Australians want to travel overseas in the next year (TTF May 2020)
- Right now, of greatest concern are the impacts of COVID-19 on the economy followed by the restrictions on travel and movement



Target Market



An aerial photograph of a rugged, green mountain range with a coastline. The mountains are covered in dense vegetation and have a series of ridges and valleys. The ocean is a deep blue, and the coastline is visible with some white surf. The overall scene is serene and natural.

Recovery plan

2020-2021

Three Stage Recovery plan



STAGE 1: INSPIRATION

- The Dreaming phase
- Focus on Hawaii's natural beauty, landscapes and culture, reinforcing brand perceptions of the destination.
- #DreamingOfHawaii introduced when appropriate to share a message of welcome to visitors from Australia and New Zealand
- Incorporation of HVCB 'local ambassador' content (rooted campaign)



Natural Beauty



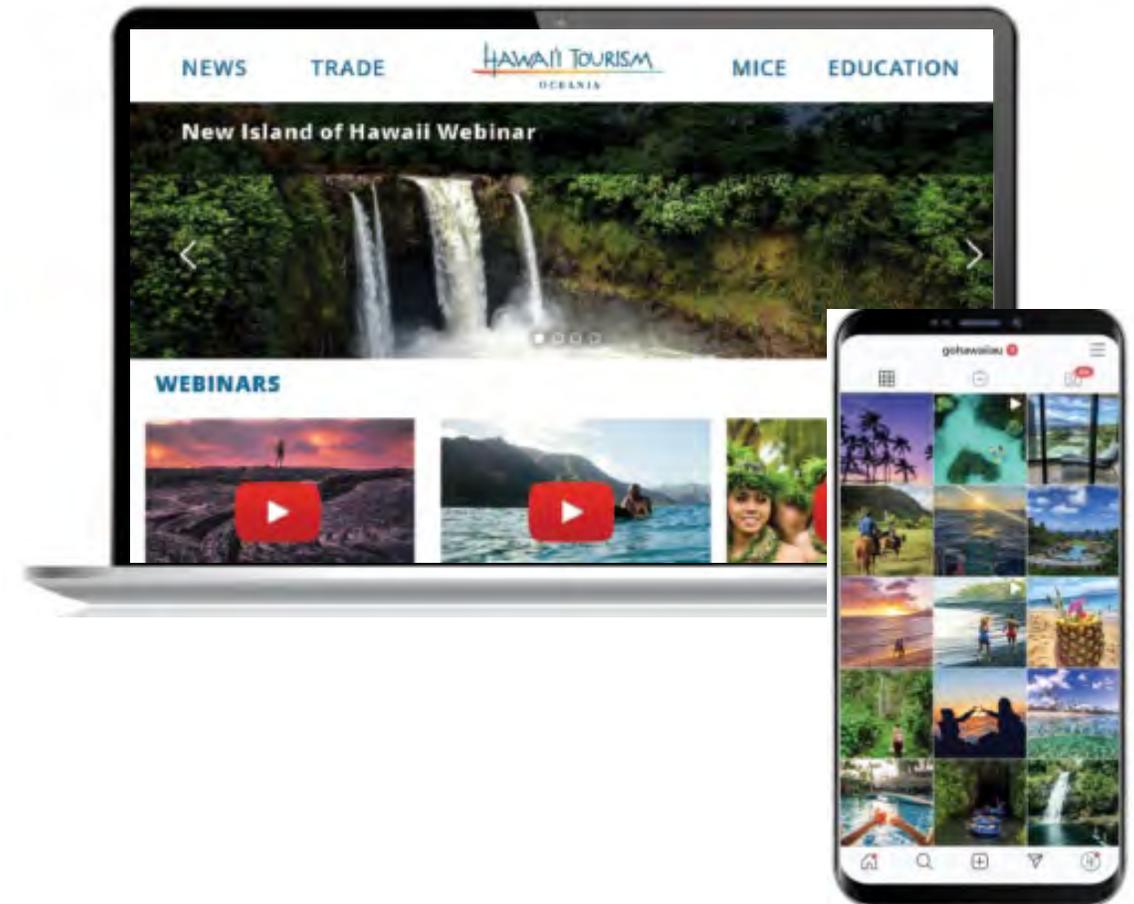
Hawaiian Culture



Responsible Tourism

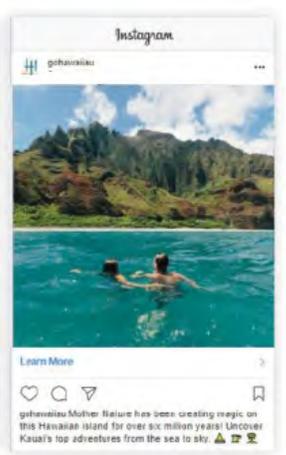
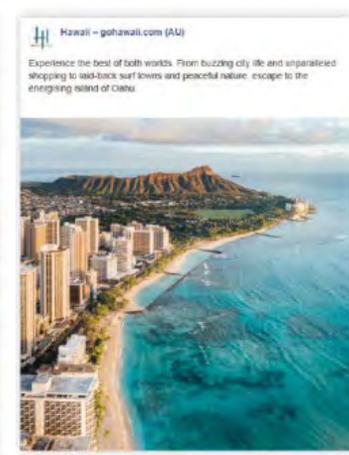
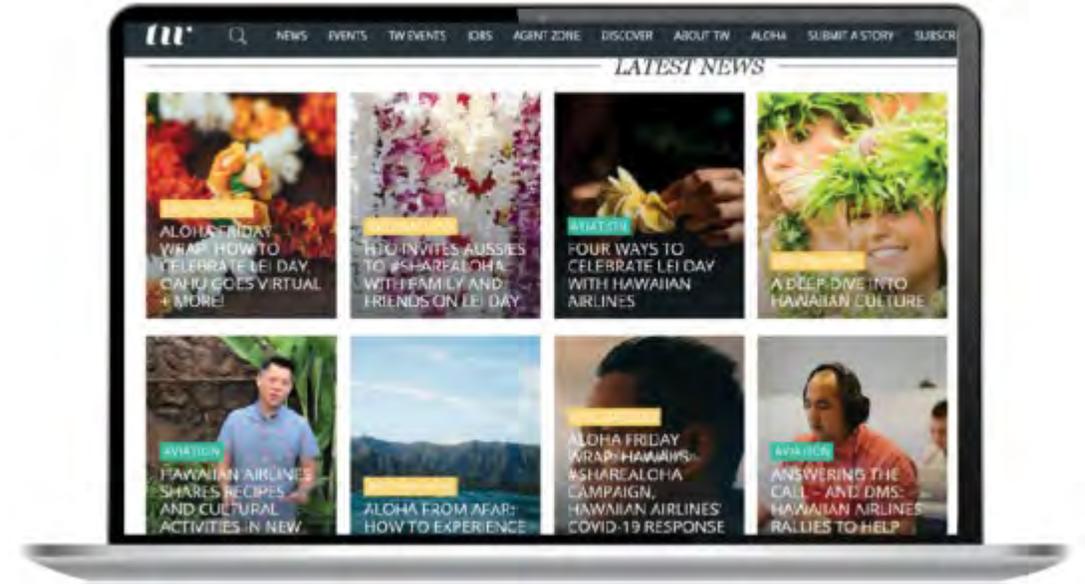
STAGE 2: BRAND DEPTH

- Active Planning stage
- Setting the foundation for inspiring and motivating the desired future visitor to choose Hawai'i
- Activity aligned to brand pillars and creating travel intention through rich content and imagery with a focus on digital marketing and PR activity
- Timing around planned re-opening of air access and growing consumer confidence to travel



STAGE 3: CONVERSION

- Conversion – booking and travel
- Air access resumes between Australia/New Zealand and Hawai'i. HTO will work with airline partners to support this transition.
- Call to action sensitive to the environment aligned with trade integration.
- #LetHawaiiHappen is introduced



Campaign example

Audience polls



Live streaming



Videos of influencer famils showcasing island personalities



30,000+
Instagram followers



123,000+
Facebook fans



4,000,000
Estimated paid digital reach*



500,000
Collective influencer reach*



160,000+
HTO subscriber database



200+
Pieces of content*

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 water falling from a high point on the left side of the frame. The surrounding area is filled with dense, vibrant green foliage, including ferns and other tropical plants. The overall atmosphere is serene and natural.

Mahalo

Agenda Item #4:

Presentation of Canada GMT
on the Recovery for 2020 and
Brand Marketing Plan for 2021.

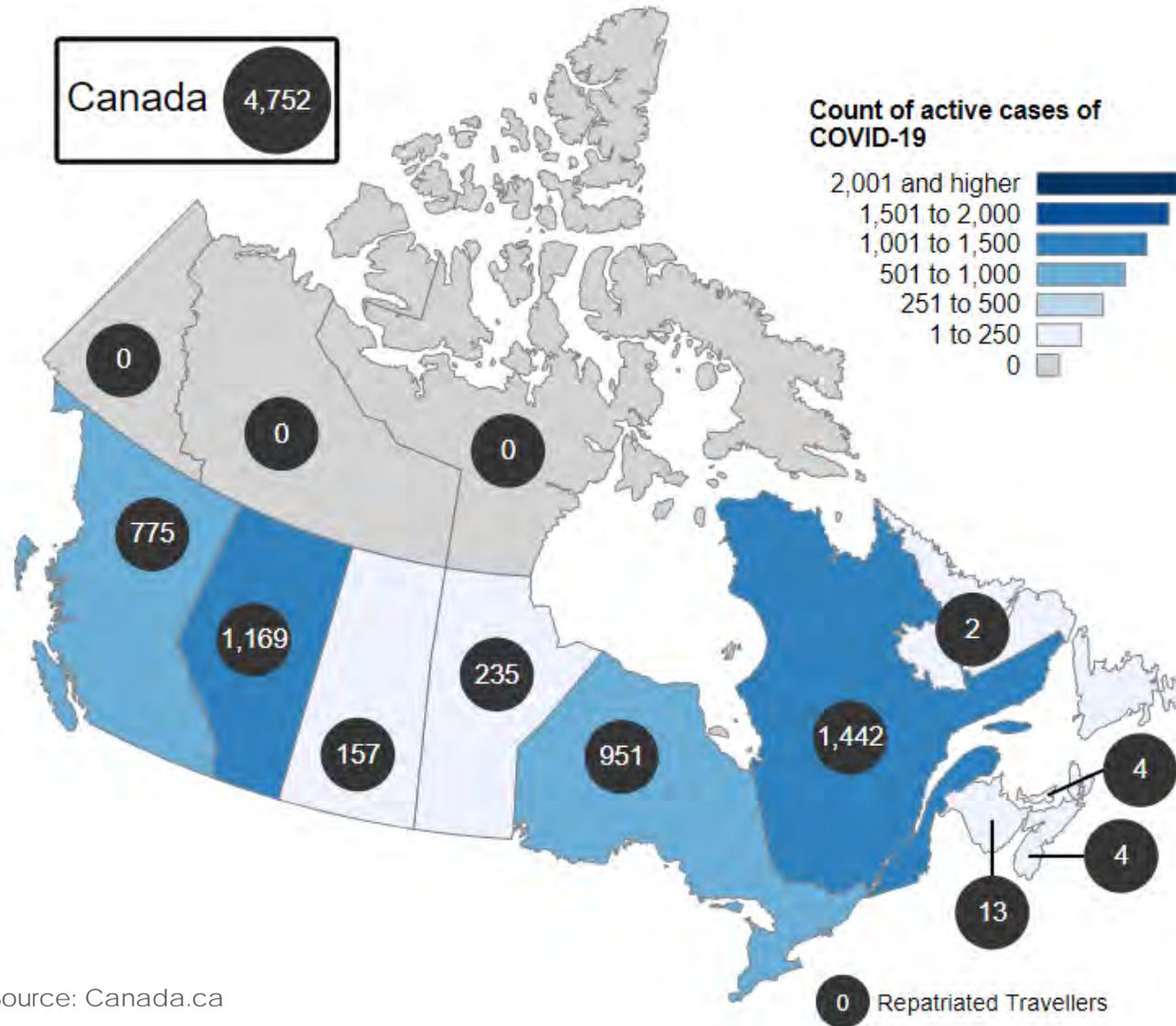
HTA Marketing Committee Meeting

August 26, 2020

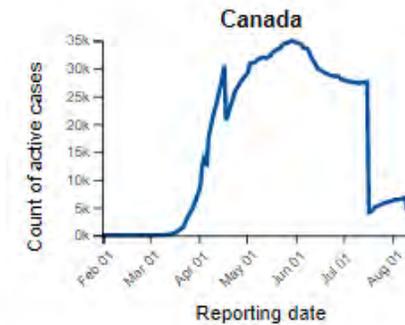
An aerial photograph of Niagara Falls at dusk. The falls are illuminated, and the surrounding area is lit up with city lights. The text "Canada Overview" is overlaid in the center of the image.

Canada Overview

COVID-19 Current Status



The count of active cases of COVID-19 in **Canada** was **4,752** as of August 18, 2020.

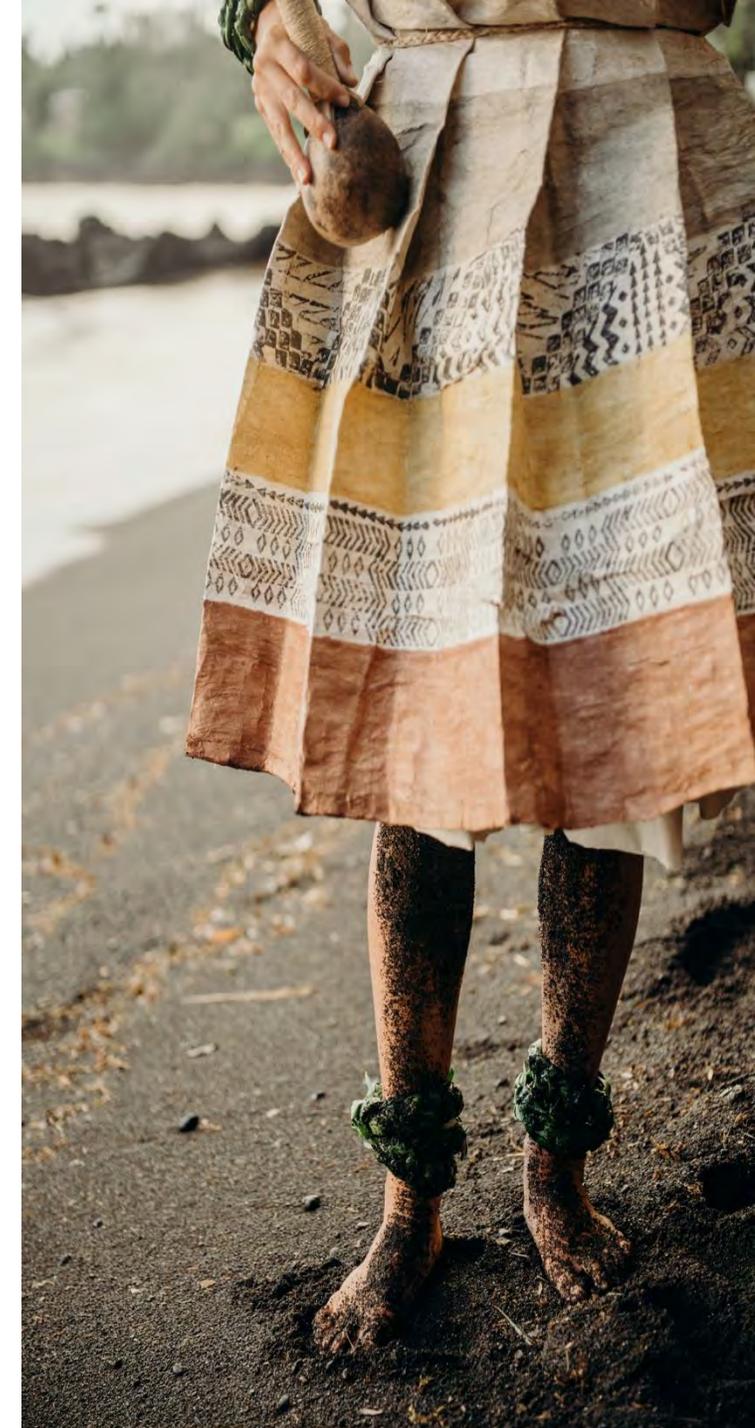


- All key market provinces (AB, BC, ON & QC) are in phase 3 out of 5 of the reopening process
- 9,000 deaths

Economic Forecast

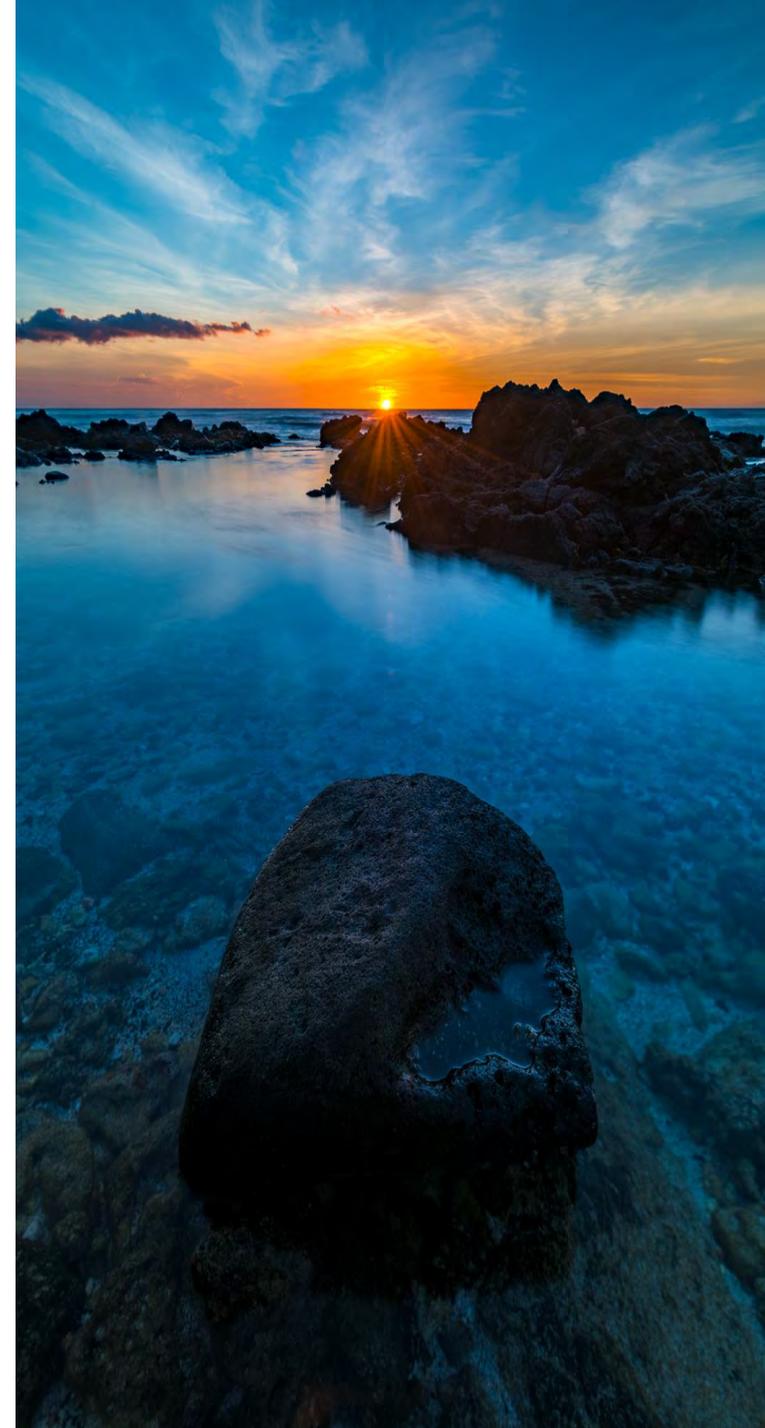
Economic Indicators	2020f	2021f	2022f	2023f
Real GDP, market prices (2012 \$) (% change)	-7.8%	6.7%	4.9%	1.8%
Real Disposable Income (2012 \$) (% change)	7.3%	-3.2%	1.5%	1.1%
Household Spending (2012 \$) (% change)	-10.3%	8.6%	5.3%	2.0%
CAD/USD	\$1.34	\$1.28	\$1.26	\$1.26

- Canadian federal government's fiscal response more than C\$300 billion or 14% of GDP
- The subsidy for receiving 75% of wages to remain until December
- Canadian Dollar has lost value averaging \$0.732 USD this year (-2.3%)
- Consumer confidence increased to 79.7, roughly 2/3 of the pre-pandemic level (120.6)
- The Bank of Canada's interest rate is 0.25%



Airline Update

- Air Canada plans to resume some flights depending on the Canadian-U.S. border policy; there are plans to start flying in early September depending on the pre-arrival testing policy measures
- No flights for August to Hawai'i
- Air Canada has announced a new partnership with Cleveland Clinic to develop biosafety measures across its operations (Clean & Safe program)
- WestJet announced 5 major U.S. destinations & 4 international destinations between July 16 - September 4:
 - Atlanta, Las Vegas, Los Angeles, New York (LaGuardia) & Orlando
 - Cancún, Montego-Bay, London (Gatwick), Paris
 - No flights to Hawai'i have been announced
 - 3,600 positions have been eliminated
- The Canadian Transportation Agency states airlines only have to offer passengers travel vouchers for cancelled flights due to COVID-19 pandemic, both the European Union & the U.S. have declared that — under their rules — passengers are entitled to refunds
- HTCAN is in constant communication with WS and AC executives for updates and collaboration on easing their comeback to Hawai'i



Border & Travel Policy

- The U.S.-Canada border is to remain closed until September 21st, this period may be extended depending on the COVID-19 cases in the mainland USA
- Visitors to Canada (including residents) must quarantine for 14 days regardless of their origin
- Only people admitted into Canada are Canadian citizens, Canadian permanent residents, first degree relatives of the previous categories and essential workers
- Ottawa is encouraging Canadians not to travel abroad
- Two insurance companies are already covering COVID-related illnesses abroad; the rest of the insurance companies will cover these illnesses once Ottawa lifts the no-travel recommendation
- More than 30 countries currently accept or will soon accept Canadian tourists

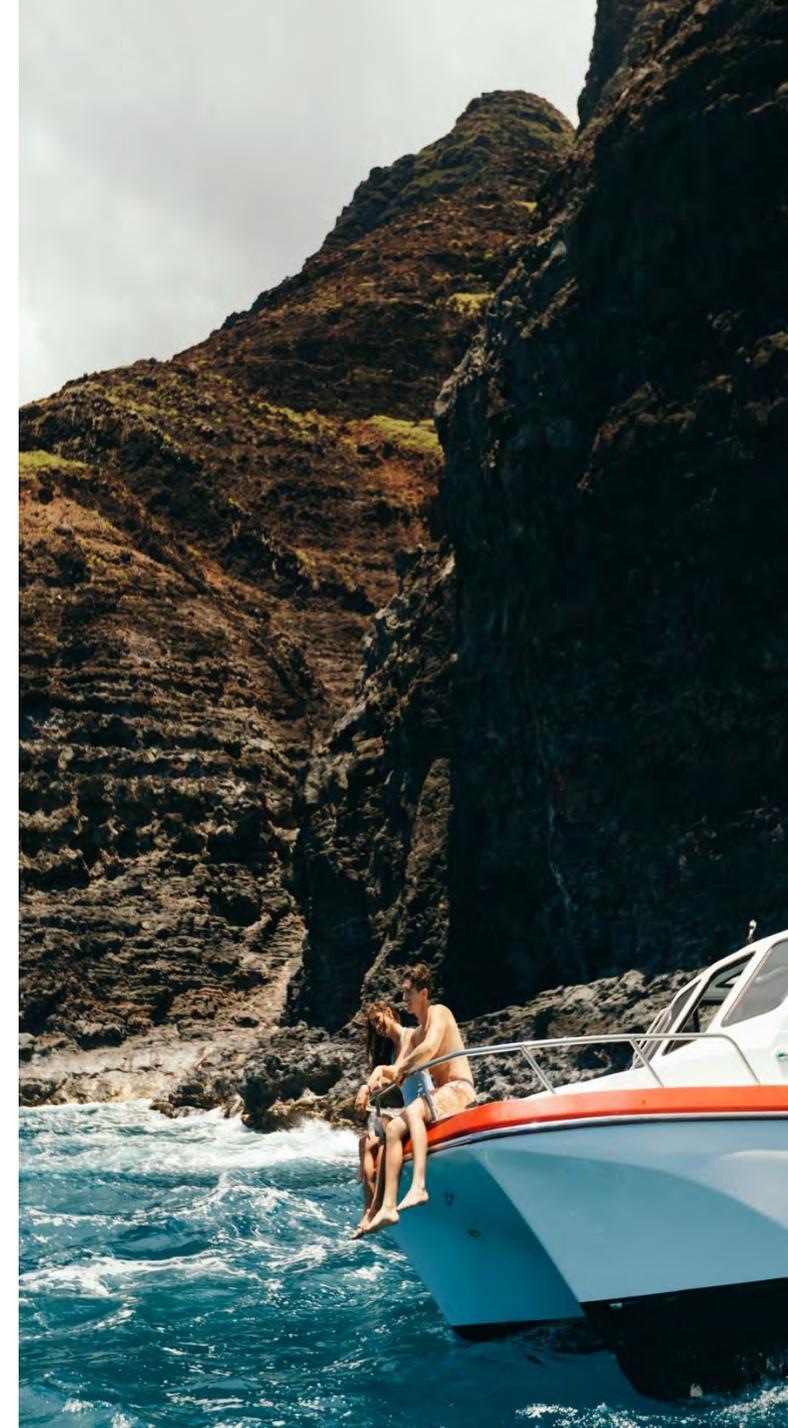




2020 Recovery Plan

Traveler Sentiment

- Canadians will be one of the first markets to return to traveling
- With physical distancing & social isolation taking a toll on multigenerational families being separated as a result of COVID-19; Canadians will be looking for ways to connect face-to-face more than ever
- Canadians will plan more road trips within Canada & across the border to the United States (when open)
- Canadian snowbirds that have homes & time shares in Hawai'i will be making their plans to travel back for the winter season (insurance available)



Overview

Refined Targeting & Objectives

- High-Value Travelers
- Increase multi-island visits
- Hawai'i Destination Specialist Program
- Increase MCI Planner Engagement & Product Awareness
- Repeat Visitors

Pillars

- Branding
- Natural resources
- Hawaiian culture
- Community

Messaging

- Communicate
 - purity of the environment,
 - the clean / pure air and water
 - wide open spaces
 - rejuvenation/healing place
 - Hawai'i as a safe destination
- Pre-arrival
 - Our resort areas are open, enjoy them
 - Importance of appropriate behavior when visiting our communities, while out in nature, and for our culture

2020 Recovery Activities

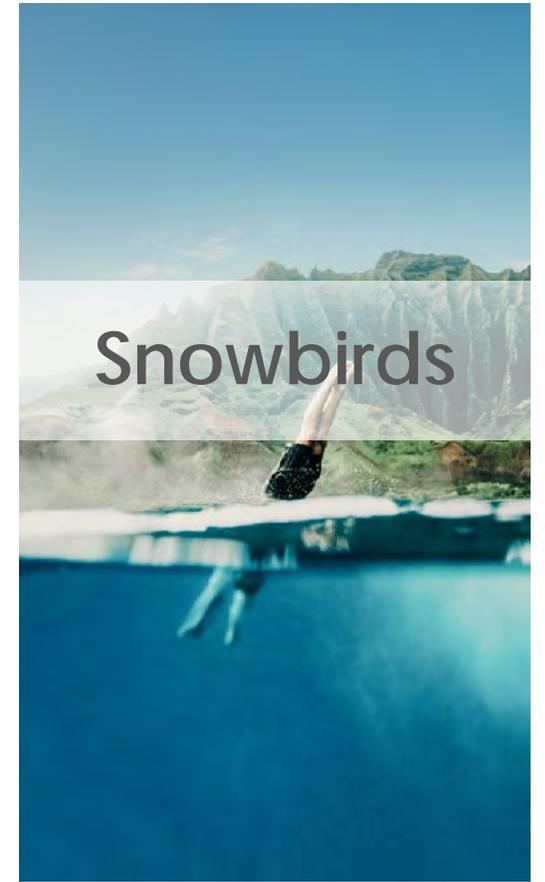
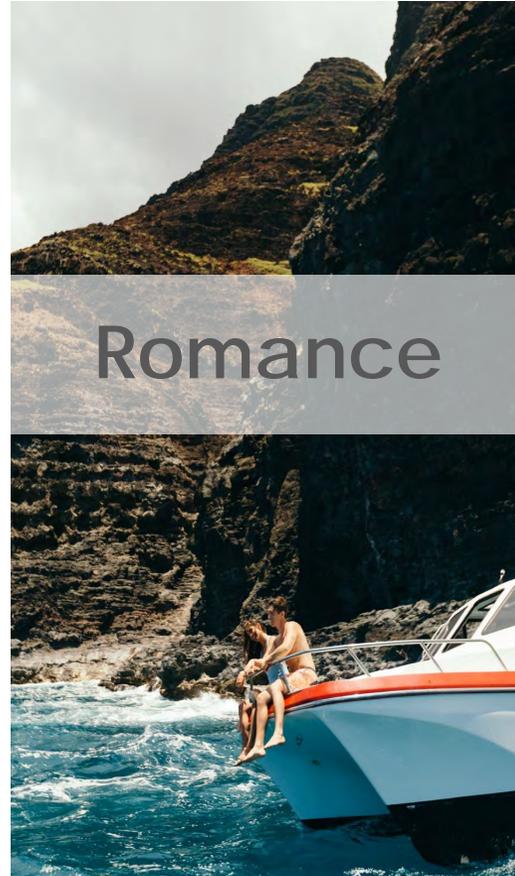
- Aloha Canada, November 17th or December 3rd
 - Trade show (up to 25 partners)
 - Webinars: Island Chapters, Hawaiian culture, Airlines
- Webinar campaign with Spoiled Agent (Sep-Dec)
- Quarterly newsletters (Kuleana/Rooted, news, COVID info, etc.)
- Constant communication with trade partners, MCI planners, Hawai'i partners
- Potential programs with strategic partners (Airlines, OTAs, Tour Operators, and large consortia partners)



An aerial photograph of a rugged, green mountain range with a coastline. The mountains are covered in dense vegetation and have a series of ridges and valleys. The ocean is a deep blue, and the coastline is visible with some white surf. The text "2021 BMP Overview" is overlaid in the center of the image.

2021 BMP Overview

Target Audience



Consumer Strategy

The media strategy for Hawai'i Tourism Canada will require the ability to pivot at a moments notice.

Option 1: Assume a second wave of COVID-19 (with no closings), but one that still is top of mind.

Defensive Strategy: Protect the core. Target past visitors (accounted for 64% of visitors in 2019), frequent visitors, and younger demographic (in the US this is the norm, but in Canada we tend to skew older). Focus spend on key areas (British Columbia and Ontario), tighten the duration of the campaign and use more performance-based tactics.

Option 2: Assume that COVID-19 is not front and centre in people's minds and that there are signs things are returning to normalcy. In this scenario, some elements of Option 1 should still be in place, but we widen the geographic footprint of the campaign, as well as expand the reach to inspire new travelers.



Trade Strategy

- Educational
 - Aloha Canada (date TBC)
 - HDSP promotion to increase agent enrollment
 - Training webinars
 - Familiarization trip (10 agents, islands TBD)
**suggested May for travel*
- Promotional
 - Trade publication campaign to promote HDSP
 - OTA or loyalty program campaign
 - Co-operative campaigns (ACV, WSV, Travel Brands) **requires additional funds*



PR Strategy

Thematic Pillars



Luxury – Spas, Resorts,
Wellness, Cruises, etc.



Romance – Weddings,
Honeymoons,
Anniversaries, LGBTQ,
etc.



History/Culture –
Festivals & Events,
Cuisine, Music, etc.



Outdoors / Nature –
Volcanoes, Beaches,
Rainforests, Sea Cliffs,
etc.



Adventure/Recreation
– Sport and Activity
Participation and
Events



Family –
Multigenerational Trips,
Reunions, etc.





Mahalo
Thank you
Merci

Agenda Item #5:

Presentation of S. Korea GMT
on the Recovery Plan for 2020
and Brand Marketing Plan for
2021.



2021 Korea Brand Management Plan Presentation

Prepared by Hawai'i Tourism Korea



Korea Market Update

HAWAII TOURISM
KOREA

Korea COVID-19 Status (as of August 20)

Cases in Korea (as of 12am on August 20, 2020, data aggregated from January 3)



Testing in Korea (as of 12am on August 20, 2020, data aggregated from January 3)

Tests Performed 1,734,083

Tests Concluded 1,699,085

* Positivity Rate 1.0%

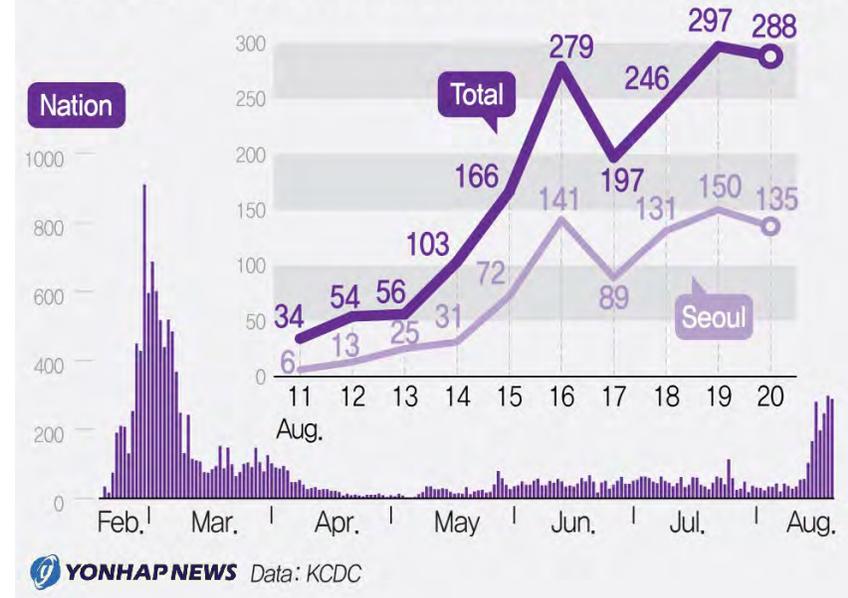
* positive tests / total number of tests concluded * 100%

Positive Results(Confirmed Cases) 16346/0.94 %
In Progress 34998/2.02 %



Negative Results 1682739/97.04 %

COVID-19 new confirmed cases in S. Korea



- 2nd COVID-19 wave spreading out
- Enhanced social distancing guidelines

Korea Economy Overview



Transforming Consumer Trends



Top keyword to consider for family trip was cleanliness (36.5%)

(Source: Expedia)



Sales of health-related goods increased 148% in the 1st quarter of 2020

(Source: eBay)



Koreans prefer "short distance travel" and "traveling with family" to minimize any risks of infection

(Source: KTO)



54% of Koreans wanted to help to reduce the impact of tourism

(Source: Booking.com)

2021 Korea Brand Management Plan

“Hawai‘i Tourism Korea will devote its resources to recover the Hawai‘i travel market from the COVID-19 crisis and also revitalize market demand in collaboration with industry partners, both in the Hawaiian Islands and Korea, with refined strategies”

2021 Key Recovery Tactics



Revitalize the market demand to have a powerful impact at the appropriate time with refined the strategies



Refresh the images of Hawai'i with its safe, sustainable and clean destination image in collaboration with HVCB to utilize resources



Inspire the Korean travelers to the Hawaiian Islands and drive business to communities with media partners



Leverage the HTK owned channels as the consumer communication platform to deliver the message from Hawai'i

Airlift Update

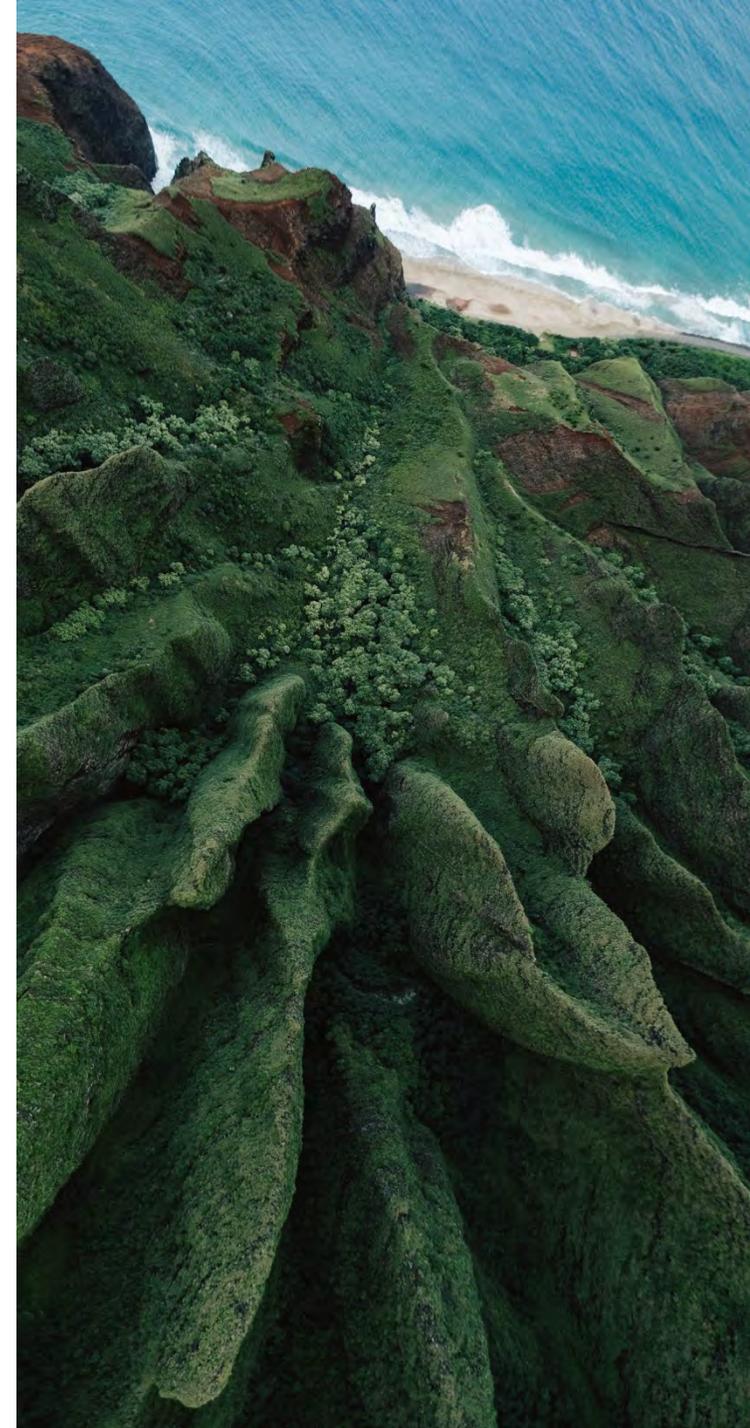
Airlines	ICN-HNL	Suspension	Resuming Int'l Routes
Korean Air	KE053	until Sept 30	<ul style="list-style-type: none"> U.S. (8): Los Angeles, San Francisco, Seattle, New York, Washington, Dallas, Atlanta, Chicago EU (4): Paris, London, Amsterdam, Frankfurt
	KE001 (via NRT)	until Sept 30	
Asiana Airlines	OZ232	until Sept 30	<ul style="list-style-type: none"> U.S. (4): New York, Los Angeles, San Francisco, Seattle EU (4): London, Istanbul, Paris, Frankfurt
Hawaiian Airlines	HA460	until Oct 1	<ul style="list-style-type: none"> N/A

An aerial photograph of a rugged, mountainous coastline. The mountains are covered in dense green vegetation and feature deep, narrow valleys. The coastline is steep and rocky, meeting a clear blue ocean. The text "2021 Korea Key Programs" is overlaid in white on the central part of the image.

2021 Korea Key Programs

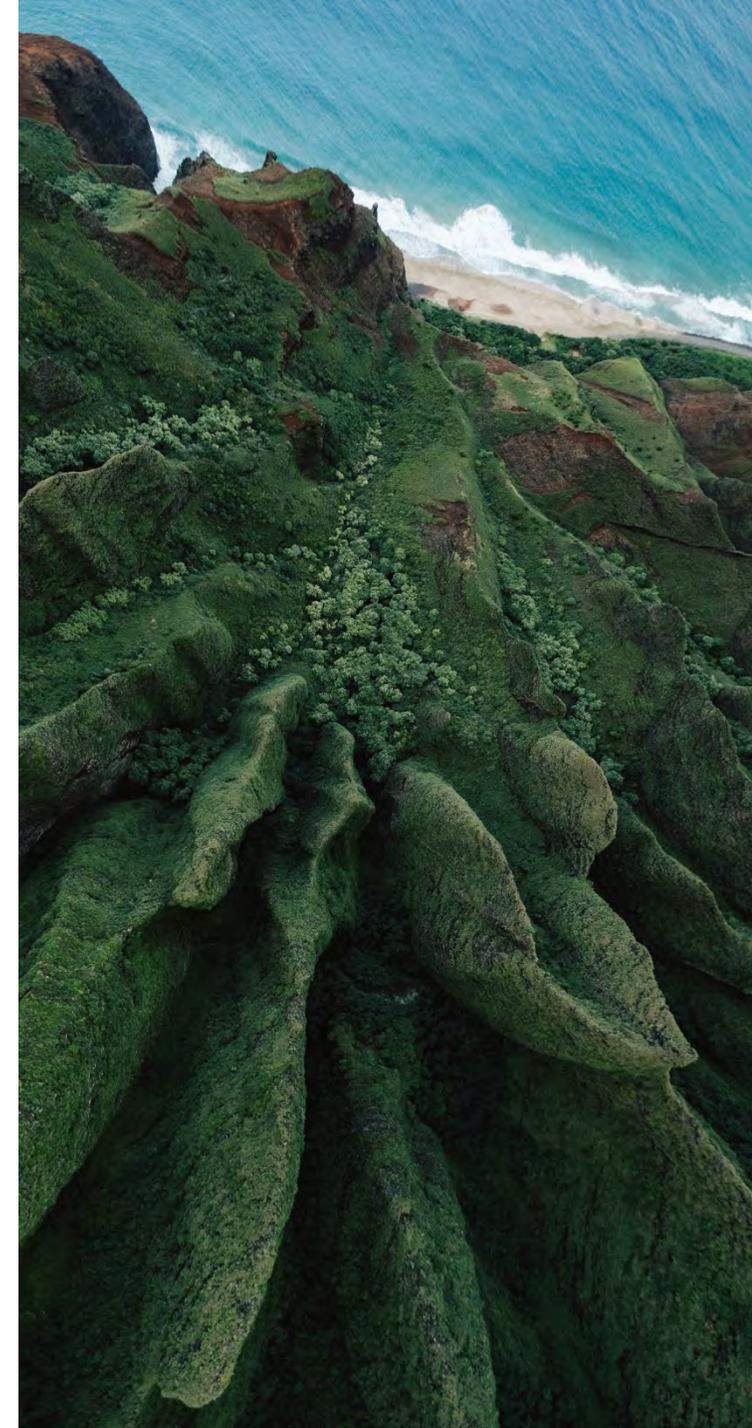
It's Time - Experience Hawai'i

- Collaborate with NAVER, largest portal site in Korea to publish series of Hawai'i posts to position the Hawaiian Islands as an essential travel destination after recovery from COVID-19 during post COVID-19 era.
- HTK will publish 1 post a week during 4 months (total 16 posts) to generate online exposure on its main website targeting Korean latent travelers.
- Each post to embrace HTA's 4 strategic pillars
 - Branding Campaign (safety highlight)
 - Natural Resources (sustainability highlight)
 - Hawaiian Culture (authenticity highlight)
 - Community Enrichment (involvement highlight)



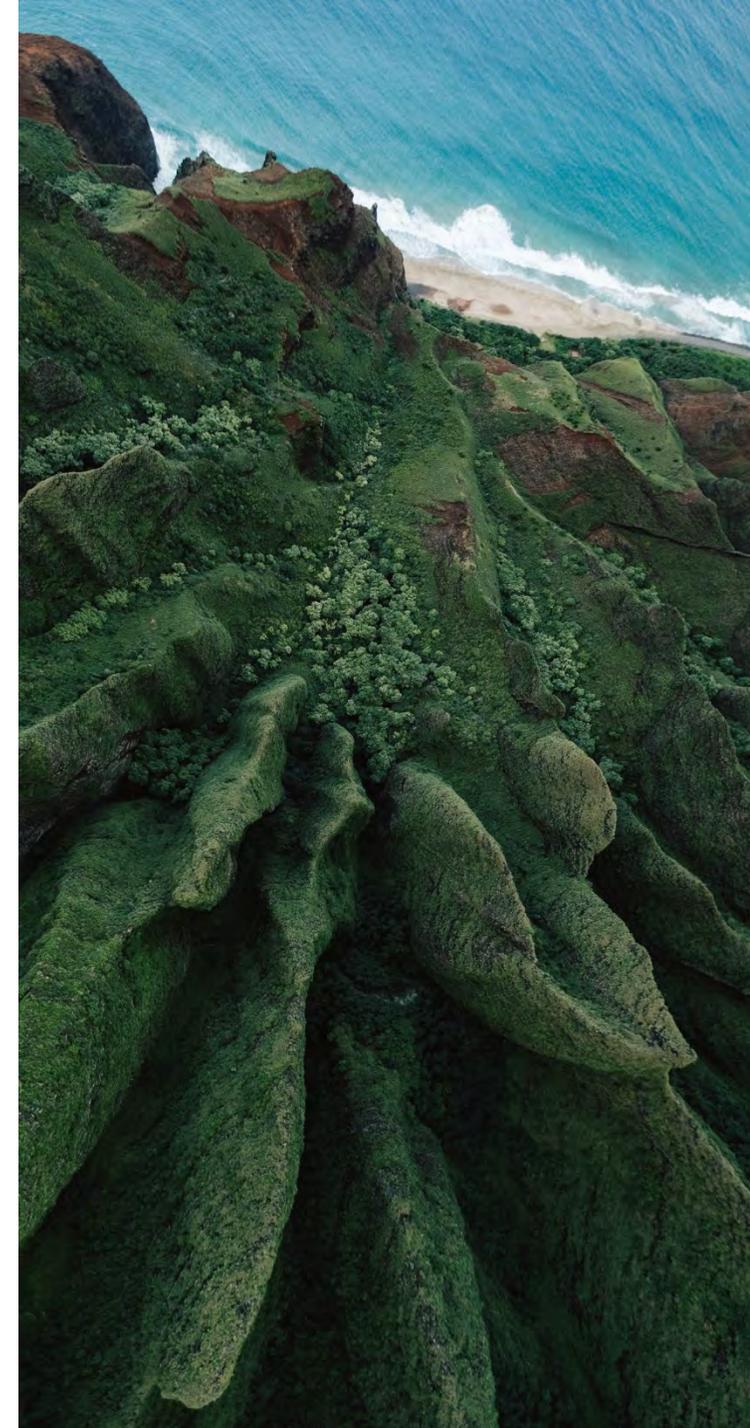
#Stories of Aloha – Social Media Campaign

- Re-launch consumer interactive Social Media Campaign called #StoriesOfAloha
- Encouraging consumers to share and post its best travel moments, safe & clean environment and experiences in Hawaii through social media channels
- Collaboration with professional Influencers:
 - Photographers
 - Fitness/Sports/Yoga Instructors
 - Artists
 - Chefs
 - Writers



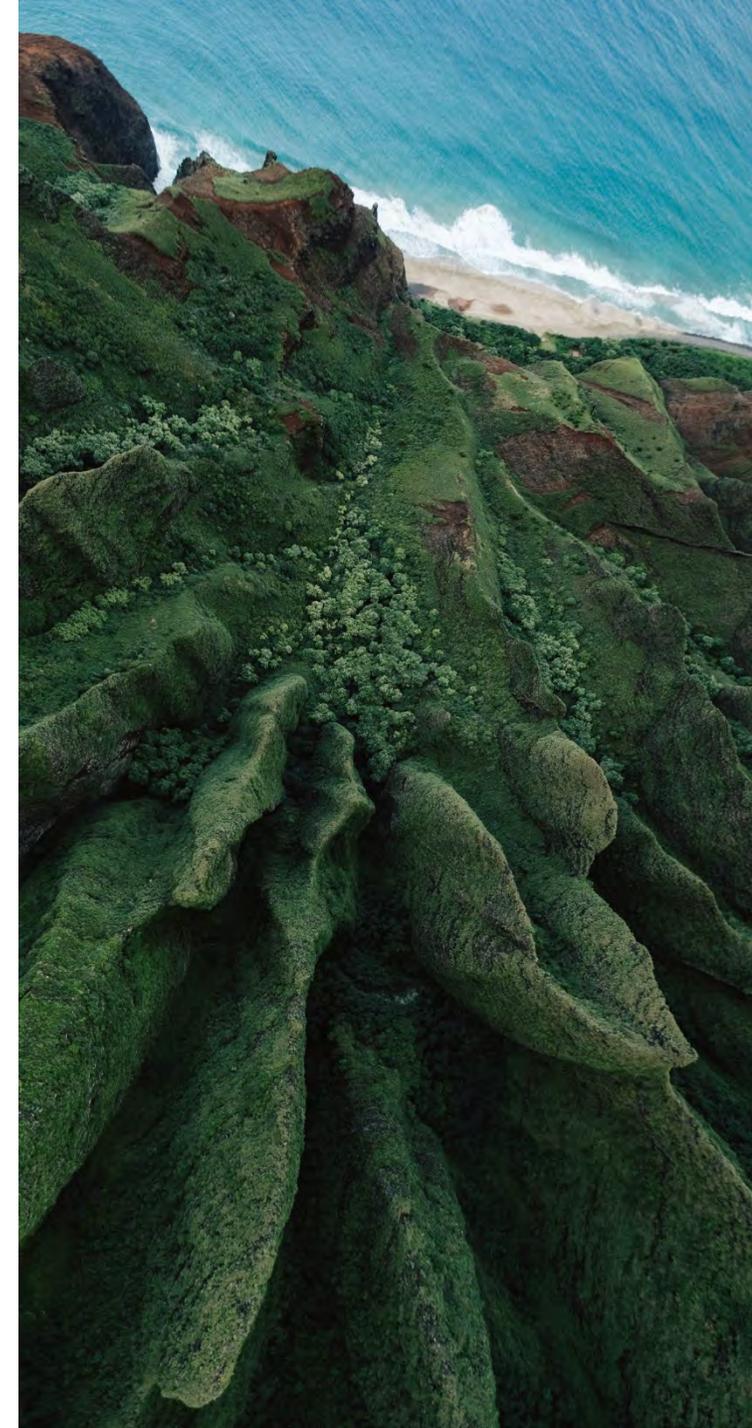
Safe & Sustainable Hawai'i Campaign with OTAs

- Targeting 'Thoughtful Visitors', Inspire Korean travelers to visit Hawaiian Islands with responsibility
- Collaboration with leading OTAs and consumer brands with large fan bases to target the FIT travel market
- Implement large-scale online advertising campaigns that feature various aspects of the Hawaiian Islands – safe & sustainable natural resources, cultural authenticity, unique culinary experience
- Co-op with consumer brands who has sustainable reputation in market to deliver the joint message of 'safe & sustainability'



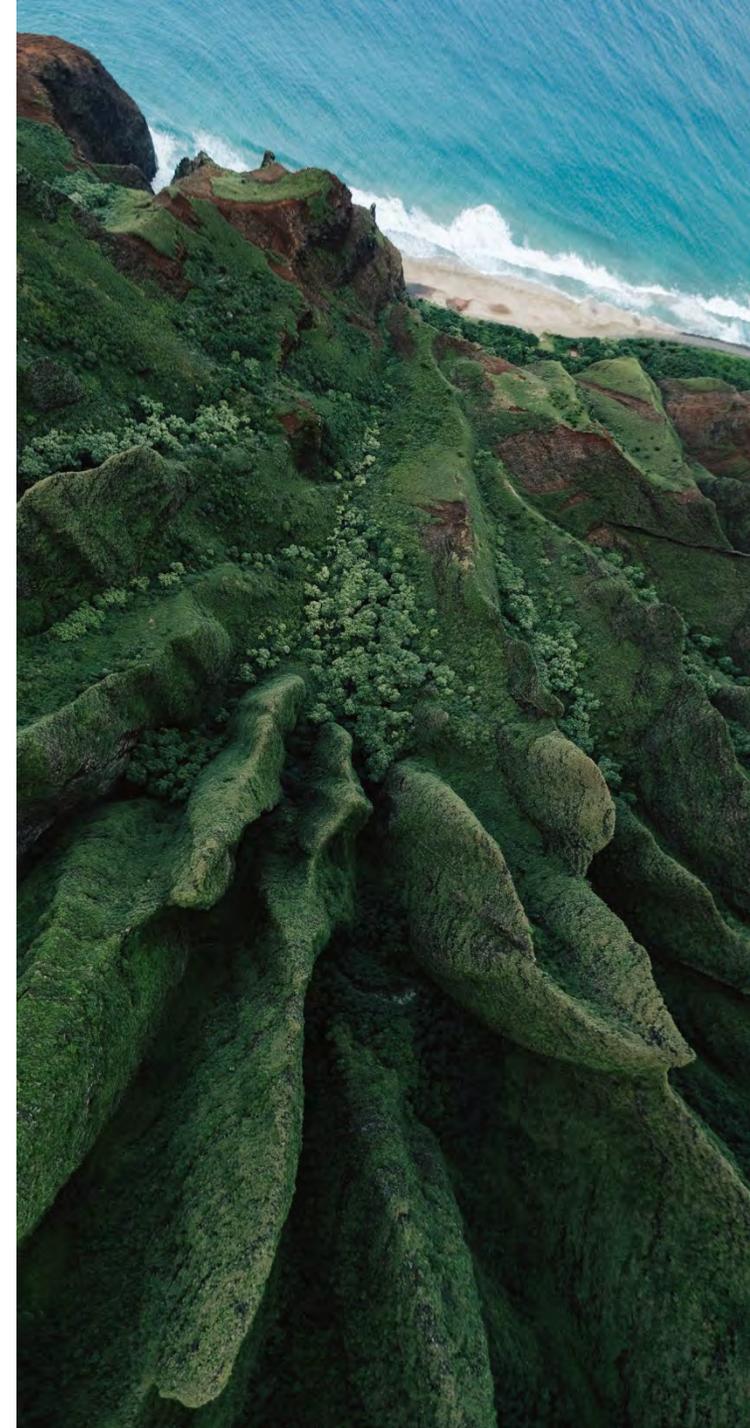
Hawai'i HOLO Promotion with Wholesalers

- Hawai'i HOLO campaign- focused on destination's healing, wellness, cleanliness, safety and relaxation
- Collaboration with wholesalers, retailers, honeymoon-specialized travel agencies
- Implement 'sales boosting promotions' and 'advertising campaign' to position Hawai'i as the most safe, clean, healing and wellness destination in the post-pandemic era
- Highlight the state's safety protocol and cleanliness standards of the Hawaiian Islands through Hawai'i-exclusive promotional webpages

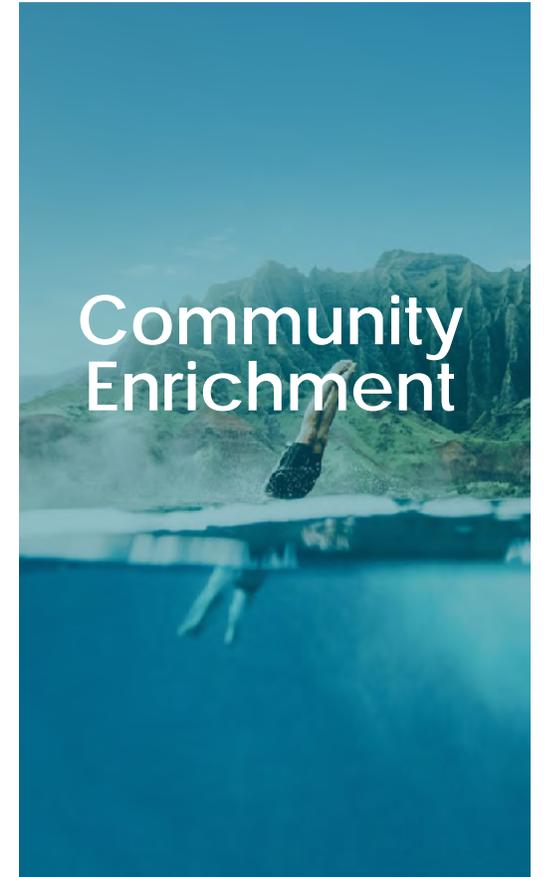


Aloha Specialist University (ASU) – Webinar

- Kick off its in-market agent training program called Aloha Specialist University (ASU)
- Invite Korean travel agents who can better represent Hawaiian Islands in the Korean market in focus of;
 - Ho'okipa (hospitality)
 - Kuleana (responsibility)
- Conduct a series of Webinars to train travel agents about enriched cultural heritages, offering hands-on experience and deep-rooted history of the Hawaiian Islands as well as latest destination update on COVID-19 and safety and cleanness of destination.



2021 Action Plan Integration





Mahalo

HAWAII TOURISM
KOREA

Agenda Item #6:

Presentation of HTJ by Eric Takahata / Managing Director of their newly created Safety Protocol Video for the Japanese consumers and travel trade



Recovery Plan
~ Japan Market ~

August 26, 2020

Japan Market Current Situation

Japan's COVID-19 Case

Population

United States	Japan	Hawaii	Tokyo
330.14 million	125.9 million	1.41 million	14 million

Cases of COVID-19 in the US, Hawaii and Japan

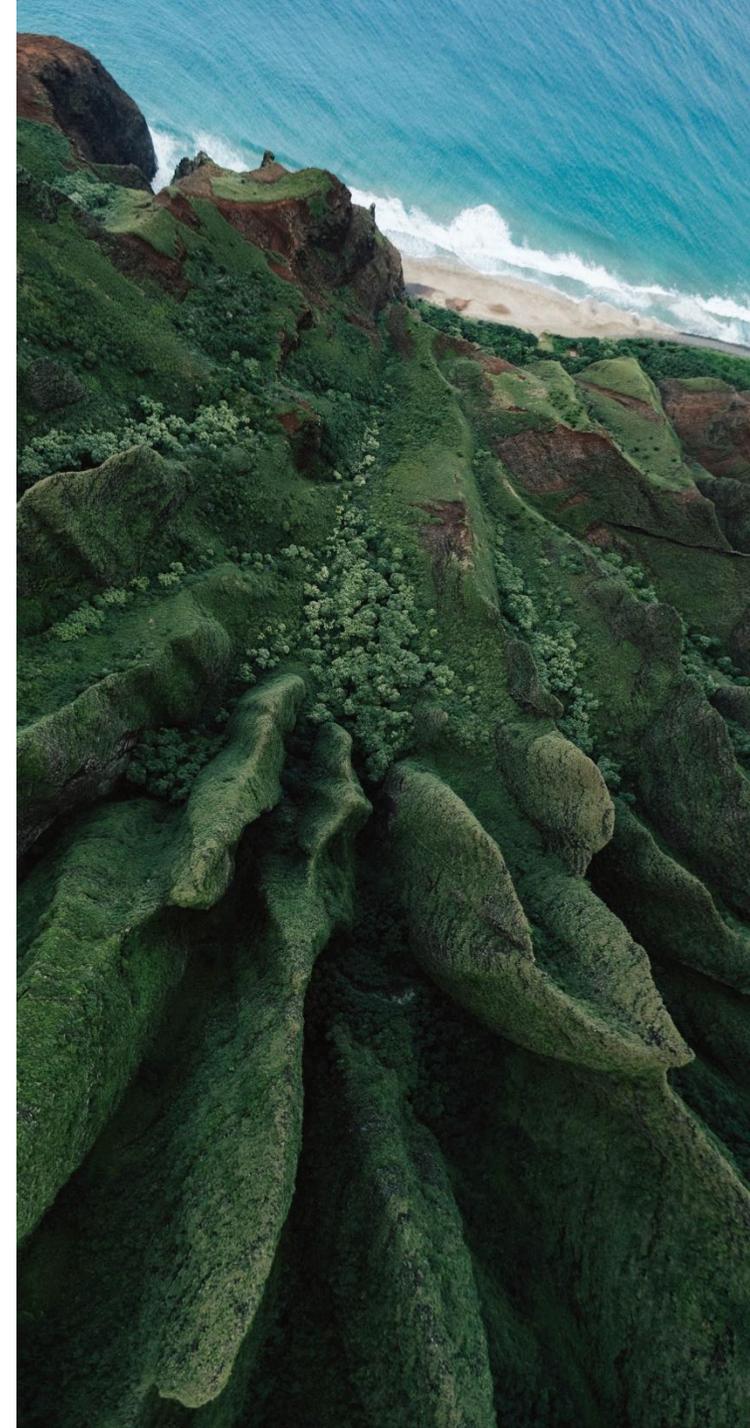
	U.S.	Hawaii	Japan
Total Cases	5,506,929	5,844	60,030
Recovered	NA	2,031	46,445
Deaths	172,416	45	1,159

Comparison of cases in Hawaii and Japan per 100,000 people

	Hawaii	Japan
Confirmed Cases	413	44

Japanese Market Conditions

- Considering resumption of travels for the **12 countries** of Brunei, Cambodia, China, Hong Kong, Macao, Laos, Malaysia, Mongolia, Myanmar, Korea, Singapore and Taiwan. Europe and Hawai'i are **next** on the list for countries and regions for resumption of travels.
- Expansion of COVID-19 testing capabilities from the current 2,300 each day to **10,000** at airports to prepare for the easing of travel restrictions by the **end of September**.
- Introduction of testing centers for COVID-19 at **Narita, Haneda** and **Kansai** International Airports, along with inside the metropolitan city centers of Osaka and Tokyo.

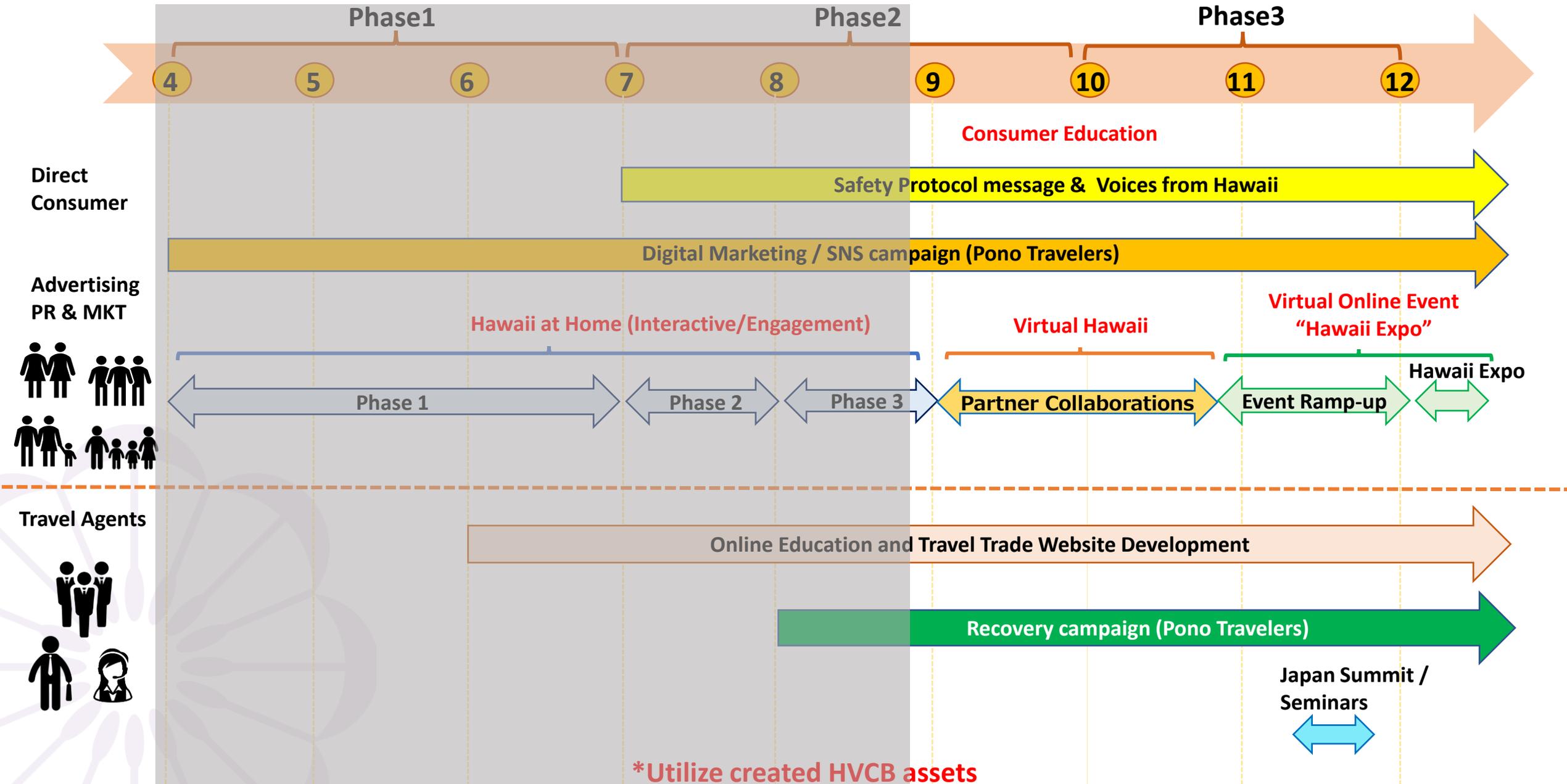


The background is a dark green color with several bright, glowing green streaks that curve across the frame from the bottom right towards the top left, creating a sense of motion and energy.

Japan Market Recovery Plan

3 Phases

Overview



Hawaii at Home

PV	UU	# of Column	Exposure	SNS Posting Twitter Instagram	SNS Impressions
840,370	660,052	132	Exposures: 135 AVE : \$620,455.9 Impression: 4,043,659,602	4,807	3,575,901

Hawaii Menu Cooking



Drawing Lesson

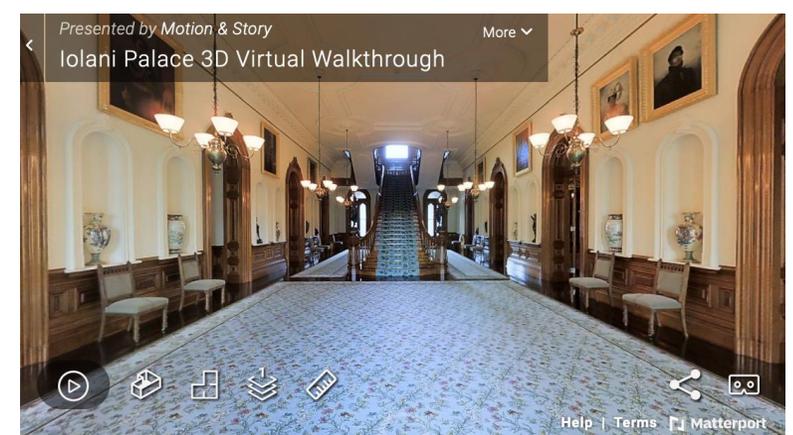


Ukulele Experience



Partner Collaborations - Virtual Hawaii (September~)

	Hawaii Stakeholder	Satellite office 	Local NPO
Purpose	“Experience”	”Tour Product” Development	“Supporting Local NPO”
Partners Collaboration	Attraction partners & Activities companies	Aloha Program Local Satellite Office (HIS & JALPAK)	Iolani Palace Bishop Museum etc.





ALOHA PROGRAM (Ma'ema'e)

Aloha Program Summary

(as of August 24, 2020)

- Total members: **57,396**
- Total specialists: **28,088**

KPI comparison 2020 vs 2019

- # of Total Member increase **127%**
- # of Advance member increased **143%**
- # of Travel Agents Hawaii Specialist increase **380%**



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

Online Travel Trade Education (January – August)

Reach to **3,800** agents





Hawai'i Tourism Japan
Safety Protocol Video &
COVID-19 Website

An aerial photograph of a rugged, green mountain range meeting a blue ocean coastline. The mountains are covered in dense vegetation and have a series of ridges and valleys. The ocean is a deep blue, and the coastline is rocky and steep. The text is overlaid in the center of the image.

Competitive Destination Safety Protocol Examples

Safety Protocol Videos for Japan Market

No.	Country (in alphabetical order)	Title of the Video	Video Link	Upload Date
1	Finland	FINLAND IS READY FOR YOU	https://www.visitfinland.com/ja/kiji/practical-travel-information-for-travelers-to-finland-during-coronavirus-pandemic/	N/A
2	Monaco	Message from Monaco	https://www.youtube.com/watch?v=Dx0J7Dfaycs	Jul-8-2020
3	Thailand	Bangkok is back as usual	https://www.youtube.com/watch?v=3Xleo8sHP1Q&feature=youtu.be	Jul-17-2020
4	Thailand	New Normal in Bangkok, Thailand	https://www.youtube.com/watch?v=8PKh9WGfS2g&feature=emb_logo	May-25-2020
5	Turkey	Safe Tourism Program in Turkey	https://www.youtube.com/watch?v=r7LNSYTKnqA	June-26-2020
	Japan	Live Together on Sado Island	https://www.youtube.com/watch?v=Hquv-jYmuj0&feature=youtu.be	May-26-2020

Airport Safety Protocol Videos for Japan Market

No.	Country (in alphabetical order)	Title of the Video	Video Link	Upload Date
1	Malaysia	Safety Protocol at KL International Airport	https://www.youtube.com/watch?v=CgbAU7hB_MU	Jul-2-2020
2	Marta	MLA Health & Safety Measures	https://www.youtube.com/watch?time_continue=86&v=7UWdRVkEpz0&feature=emb_logo	July-14-2020
3	Qatar	New Safety Measures at Hamad International Airport	https://www.youtube.com/watch?v=YO64p2HDsPY	May-20-2020
4	UK	Fly Safe I Heathrow	https://www.youtube.com/watch?v=HilKjuPuXDk	June-18-2020
5	UK	Manchester Airport Safe Travel Measures Animatio	https://www.youtube.com/watch?v=066EkSedbFo	June-25-2020

An aerial photograph of a rugged, mountainous coastline. The mountains are covered in dense green vegetation and feature deep, narrow valleys. The coastline is steep and rocky, meeting a clear blue ocean. The sky is a pale, hazy blue. The overall scene is serene and majestic.

HTJ Protocol Video Concept & Structure

Objective

- 1 Communicate the message of “ALOHA” and concept of “PONO TRAVELER”**
- 2 Accurately communicate Hawai‘i's safety protocol efforts**
- 3 Match the tone with brand concept**

Main Theme

ALOHA

A	akahai	Compassion	Feel and think with kindness
L	lōkahi	Harmony	Stand firmly in harmony
O	'olu'olu	Comfort	Balance thoughts with emotions
H	ha'aha'a	Humility	Show humility and be humble
A	ahonui	Patience	Have patience to learn independence

Sub Theme

PONO TRAVEL

- Responsible Tourism
 - Visitors share a sense of responsibility for Hawaii
 - Culture
 - History
 - Natural Resources
- Education
 - Share and respect local way of thinking/aina
 - Through experiences

The commonplace we thought would always be here, is no longer here.

The idea of not changing is changing, and we accept it.

That's why we want to cherish it.

A heart where person to person and people and nature are in harmony and respect each other.

We know that is a universal thing that will never change.

The word ALOHA has the meaning of perseverance.

Not only about being patient.

Accept the moments that are here and harmonize them with a compassionate heart.

In Hawai'i, we have accepted the various phenomena that occur from time to time and have coexisted with nature.

To experience Hawai'i safely and with peace of mind.

We have to have safety protocols in place.

(Introduction of safety protocol)

The spirit of ALOHA that has been spun across generations

Will remain unchanged now and into the future.

1

Introduction

The video starts with the tone and mannerisms similar to Hawai'i's promotional videos. "ALOHA" concept and PONO TRAVEL messaging is conveyed through the video and narration.



2

Safety Protocol

"Airport → Shopping → Hotel → Restaurant → Activities"

- Safety protocol measures in each locations and experience are shown
- Each scene is communicated in an easy-to-understand manner with text and graphics instead of narration.

3

Conclusion

Include segment with that relays message of Hawai'i as a safe destination to travel, and inform what to prepare prior to traveling to Hawai'i and what to bring when traveling.

Structure and flow of outline

Airport

- Immigration (machine cleaning, social distance, thermography)
- Fingerprint authentication (cleaning management, disinfectant installs, social distance)
- Receiving baggage (social distance)
- Entry Form when entering US
- Group exit (signs and indicators, staff's corresponding clothes, equipment, face shield etc.)

Shopping

- Shopping mall public areas (signs, presentation, disinfectant installations)
- Escalator & Elevator (Social distance mark, disinfection)
- Food court (seat arrangements, disinfectant installs, disinfection after use, social distance)
- State of entering the store
- Inside the store (social distance)
- At cash register (social distance)

Hotel

- Check-in / Check-out (procedures, thermography, porter service)
- Public areas (disinfectant installations, social distance signs in elevators and lobby)
- Room hygiene management (housekeeping cleaning content)
- Inside the room (disinfectant installation, hygiene amenities)

Resturant

- Entering the store (escort to table, disinfection use, temperature check, Menu QR code)
- Inside the store (social distance, staff clothes/equipment)
- How to order menu > How to provide meals > How to Pay when finished

Activities

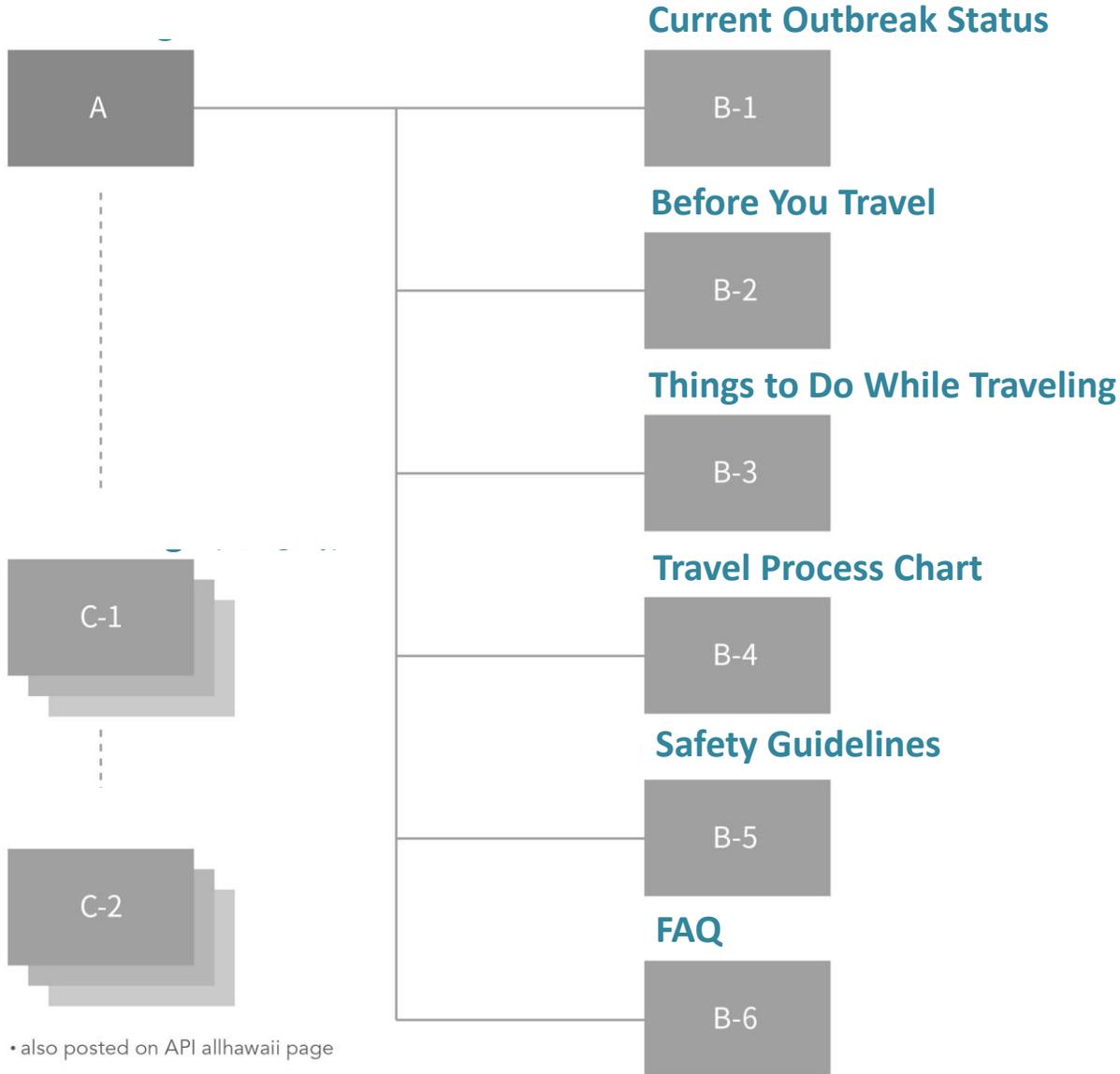
- State of procedures after arrival at the facility (Are there any social distance, temperature check, physical condition questions)
- Participation in activities (social distance and hygiene management)

An aerial photograph of a rugged, mountainous coastline. The mountains are covered in dense green vegetation and feature deep, narrow valleys. The coastline is steep and rocky, meeting a clear blue ocean. The text "COVID-19 Website" is overlaid in white, bold, sans-serif font in the center of the image.

COVID-19 Website

Spec

- 1 Promote tourism recovery from Japan after lifting the Hawai'i 14-day quarantine**
- 2 Communicate Hawai'i's infection status and safety through safety protocol efforts**
- 3 Eliminate the anxiety and doubts of travelers, by providing pre-travel information to Hawai'i and assistance during travel**



HAWAII TOURISM JAPAN COVID-19 Hawai'i Tourism Japan COVID-19 Information Website

Current Outbreak Status	Before You Travel	Things to Do While Traveling	Process Chart	Safety Guidelines	FAQ
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Latest State of Hawai'i COVID-19 Data 9/30/2020

New Cases Yesterday 78	Total Cases 1,757	Deaths 26
-----------------------------------------	------------------------------------	----------------------------

By Island 	By Age Group 	Comparing the Number of Positive Case
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Before You Travel to Hawai'i	Response While Traveling in Hawai'i
Travel Process Chart	Hawai'i Safety Guidelines

What's New 2020/8/25 XXX XXXXX XXX XXX XXXXXXX XXXXX 2020/8/10 XXX XXXXX XXX XXX XXXXXXX XXXXX 2020/7/20 XXX XXXXX XXX XXX XXXXXXX XXXXX 2020/7/05 XXX XXXXX XXX XXX XXXXXXX XXXXX 2020/6/30 XXX XXXXX XXX XXX XXXXXXX XXXXX	Message from Hawai'i
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------

• Sitemap Menu
 • Contact Info
 • HTJ SNS

Links
 • Economic & Community Recovery Navigator
 • Governor's News Release
 • COVID-19 Flyer (Japanese)
 • COVID-19 Related Terms



Mahalo

Agenda Item #7:

Presentation of HVCB Jay Talwar / Sr. VP & CMO of the newly updated video, social media messages and media strategy

Hawai'i Tourism Authority

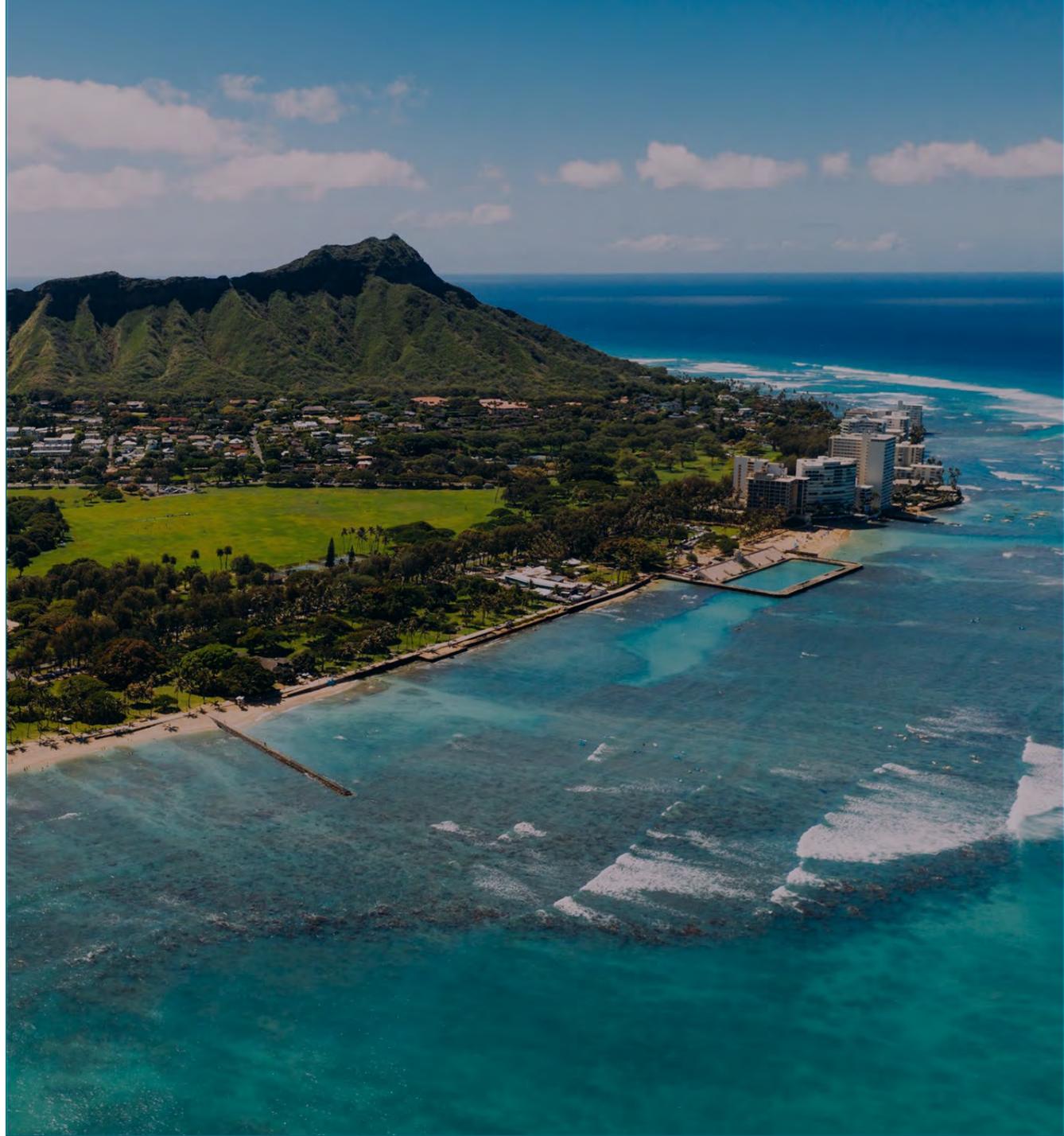
Marketing Standing Committee Meeting

Reopening Communications Strategy Update

Presented by the Hawai'i Visitors & Convention Bureau
August 26, 2020

Agenda

1. Market Insights
2. Communications Plan Updates



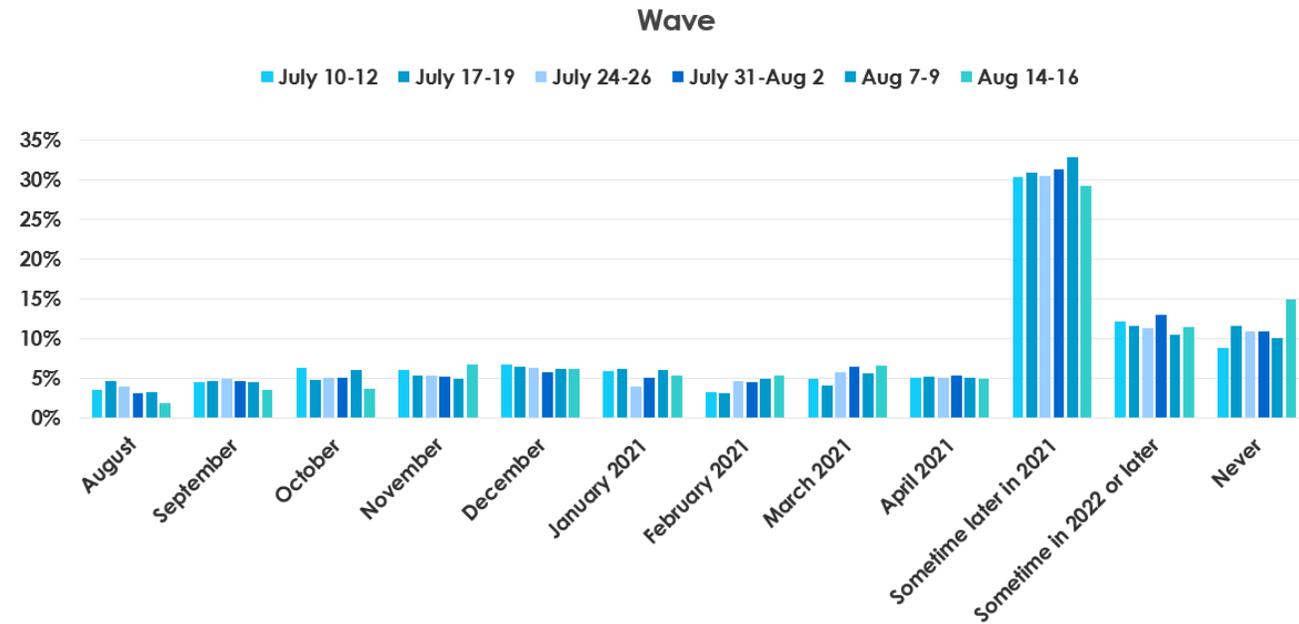


Market Insights

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

- 53.4 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 982 miles.
- 81.9 percent of travelers expressed some level of concern for the national economy.
- 71.0 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 one-third (29.2%) said they expect to take their next commercial airline trip sometime next year and haven't decided on a specific date.

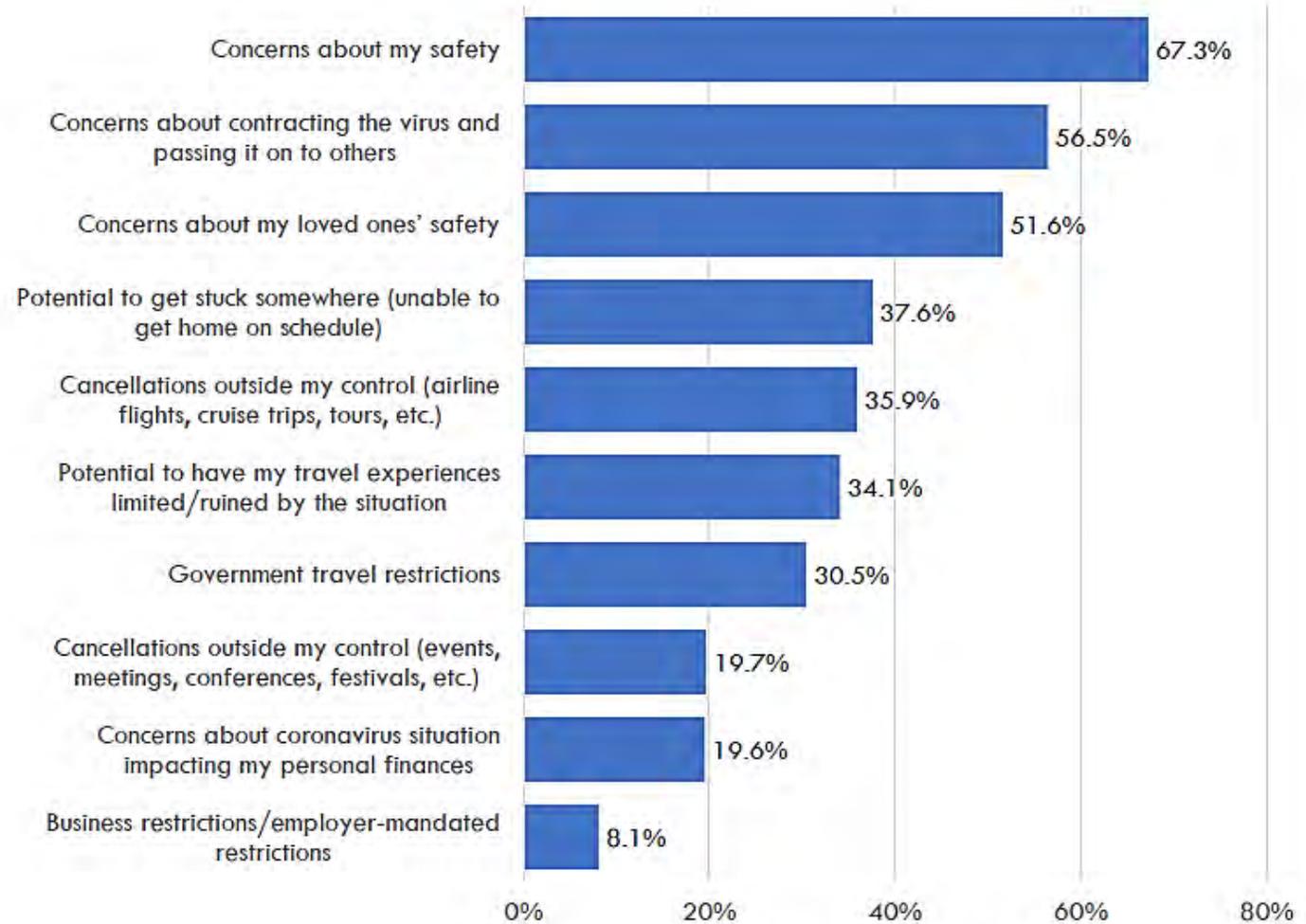


Source: Destination Analysts Coronavirus Travel Sentiment Index Report Waves 18-23

Why the Coronavirus is Impacting Travel

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

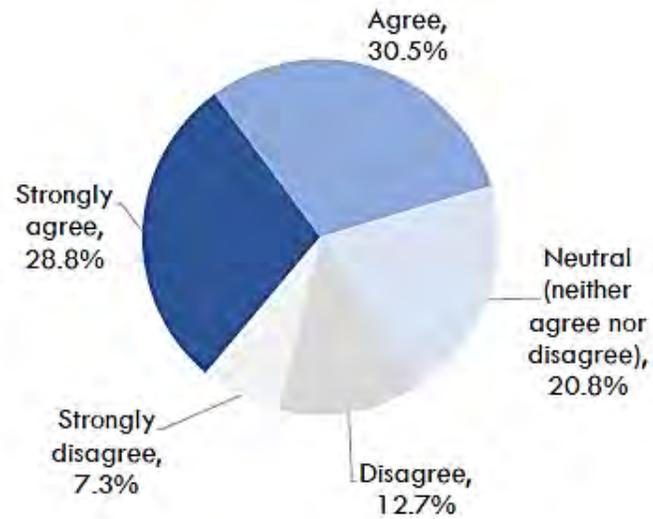
(Base: Wave 23. Respondents whose travel was impacted by the coronavirus, 916 completed surveys. Data collected Aug 14-16, 2020)



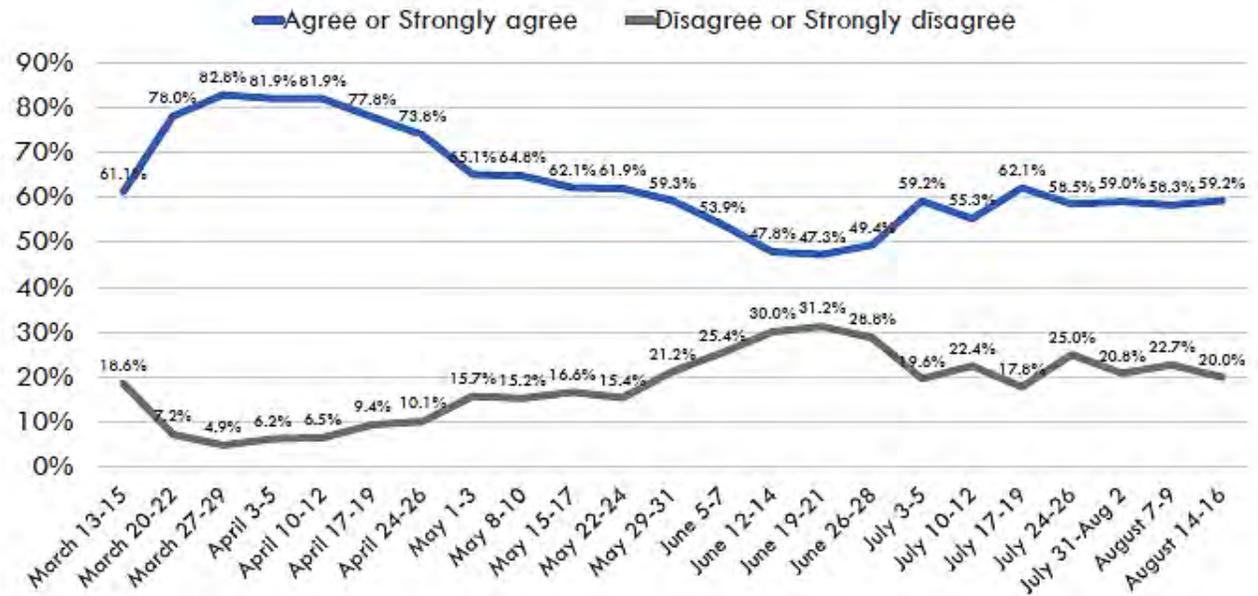
Avoiding Travel until the Crisis Blows Over

How much do you agree with the following statement?

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



Historical data

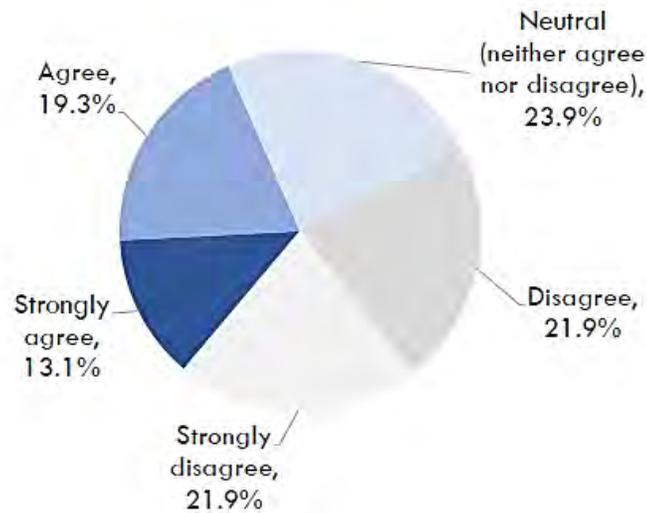


(Base: Waves 1-23. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201 and 1,202 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2, Aug 7-9 and 14-16, 2020)

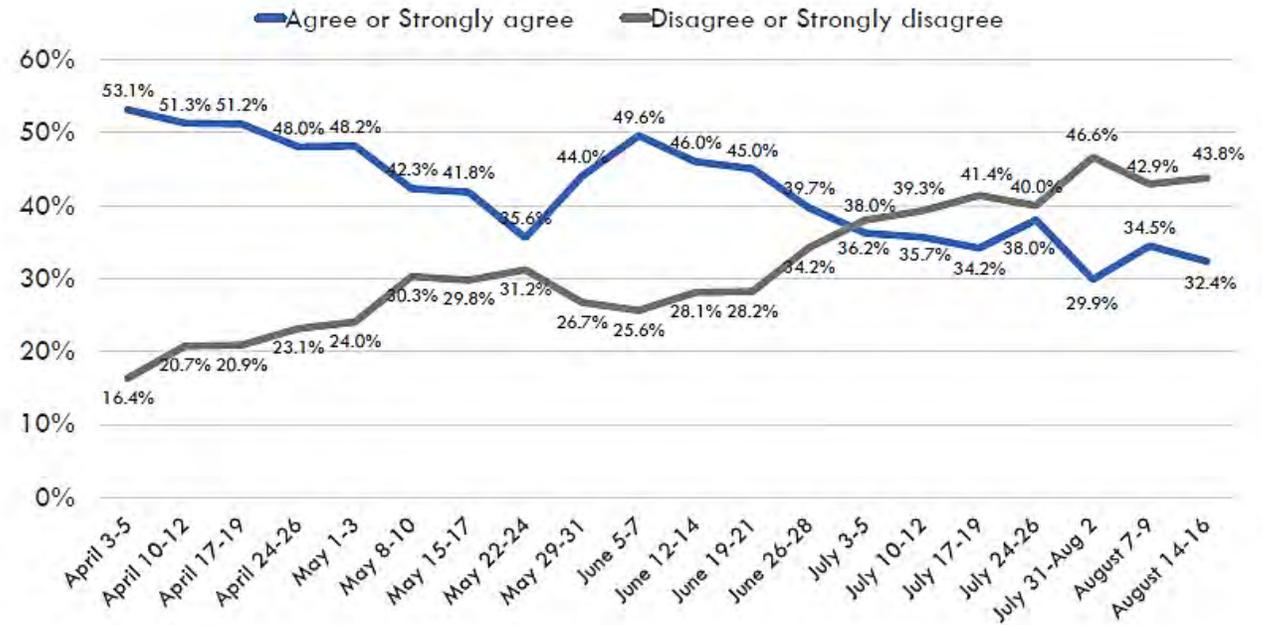
Expectations for Traveling in the Fall

How much do you agree with the following statement?

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



Historical data



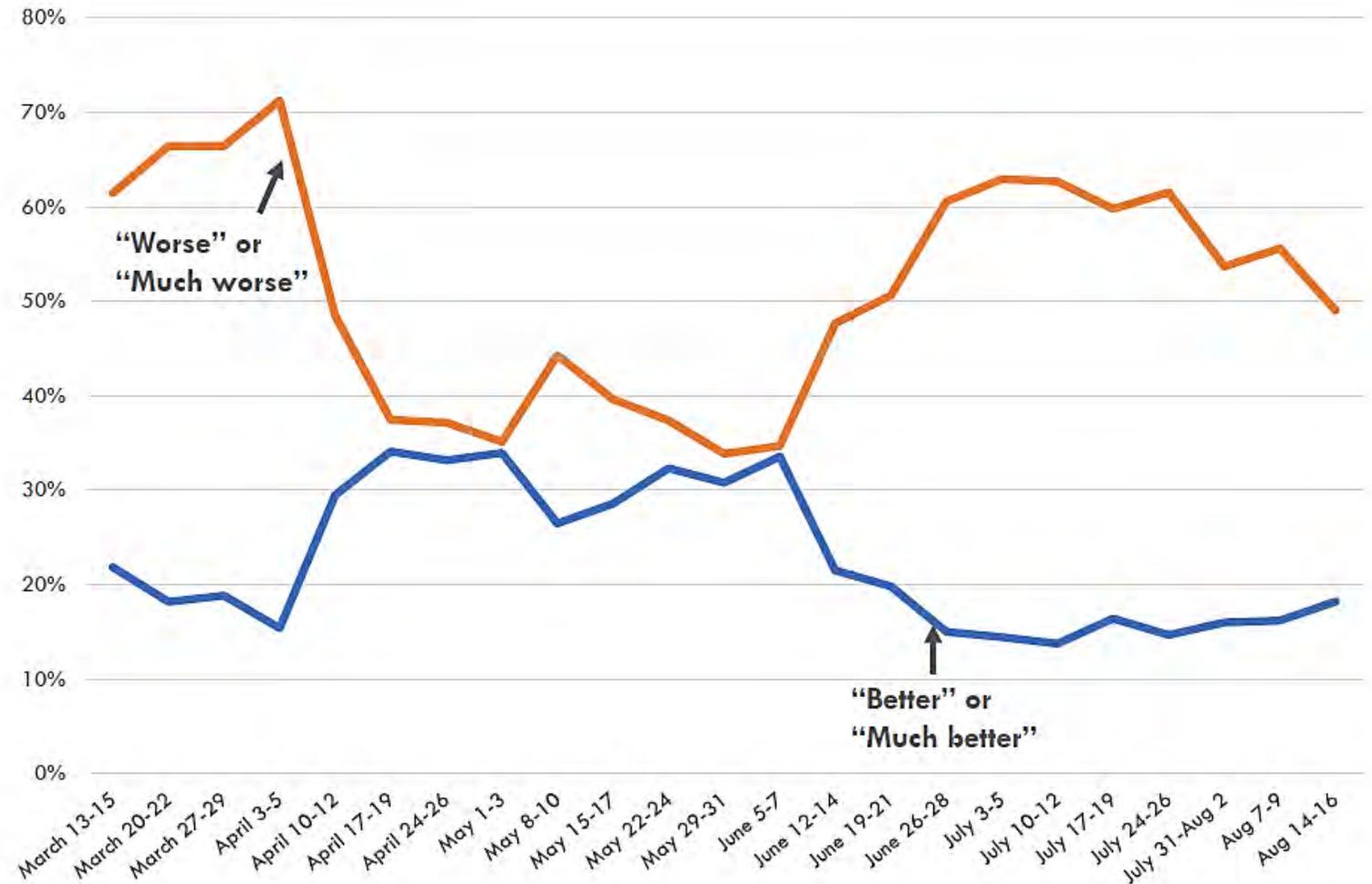
(Base: Waves 4-23. All respondents, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201 and 1,202 completed surveys. Data collected April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2, Aug 7-9 and 14-16, 2020)

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?

In the next month the coronavirus situation will _____

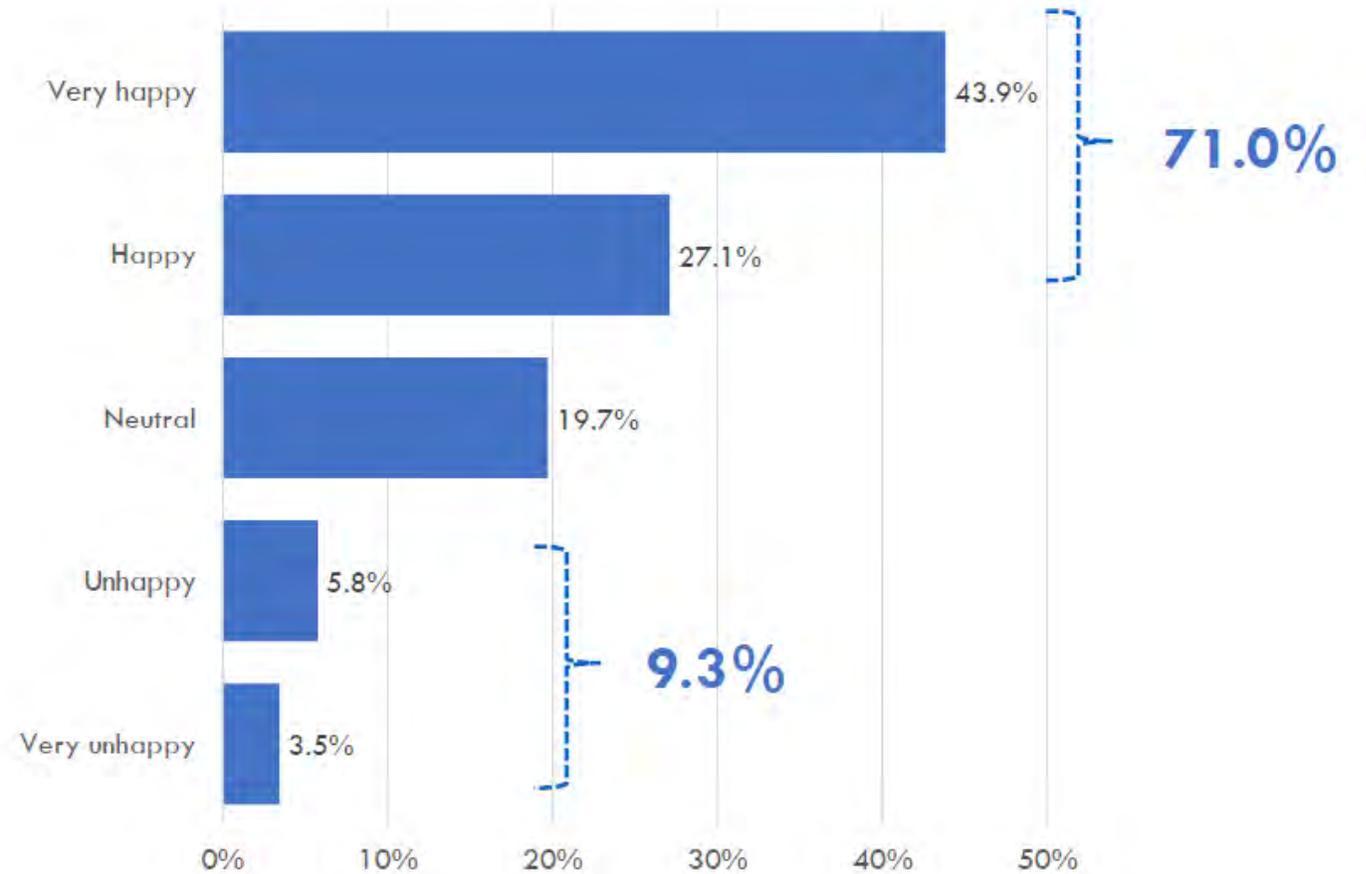
(Base: Waves 1-23. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201 and 1,202 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21, 26-28, July 3-5, 10-12, 17-19, 24-26, July 31-Aug 2, Aug 7-9 and 14-16, 2020)



Feelings about Destinations Requiring masks

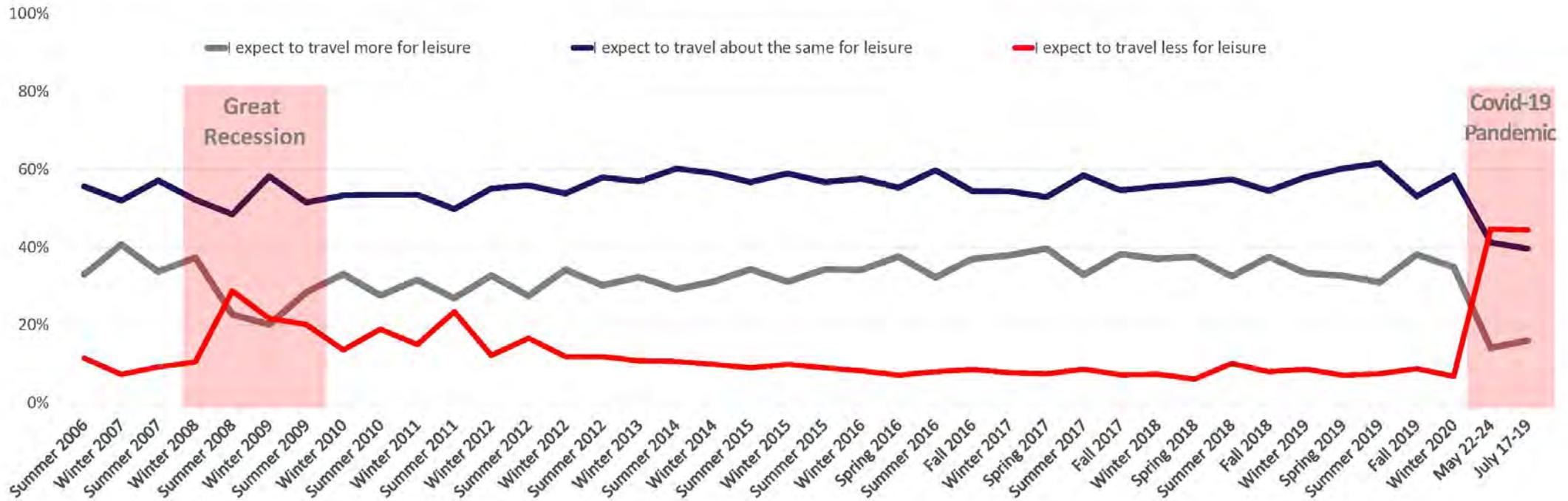
Question: Which best describes how you would feel if a destination you wanted to visit required visitors and residents to wear masks while in public?

(Base: Wave 21 data. All respondents, 1,224 completed surveys. Data collected July 31-Aug 2, 2020)



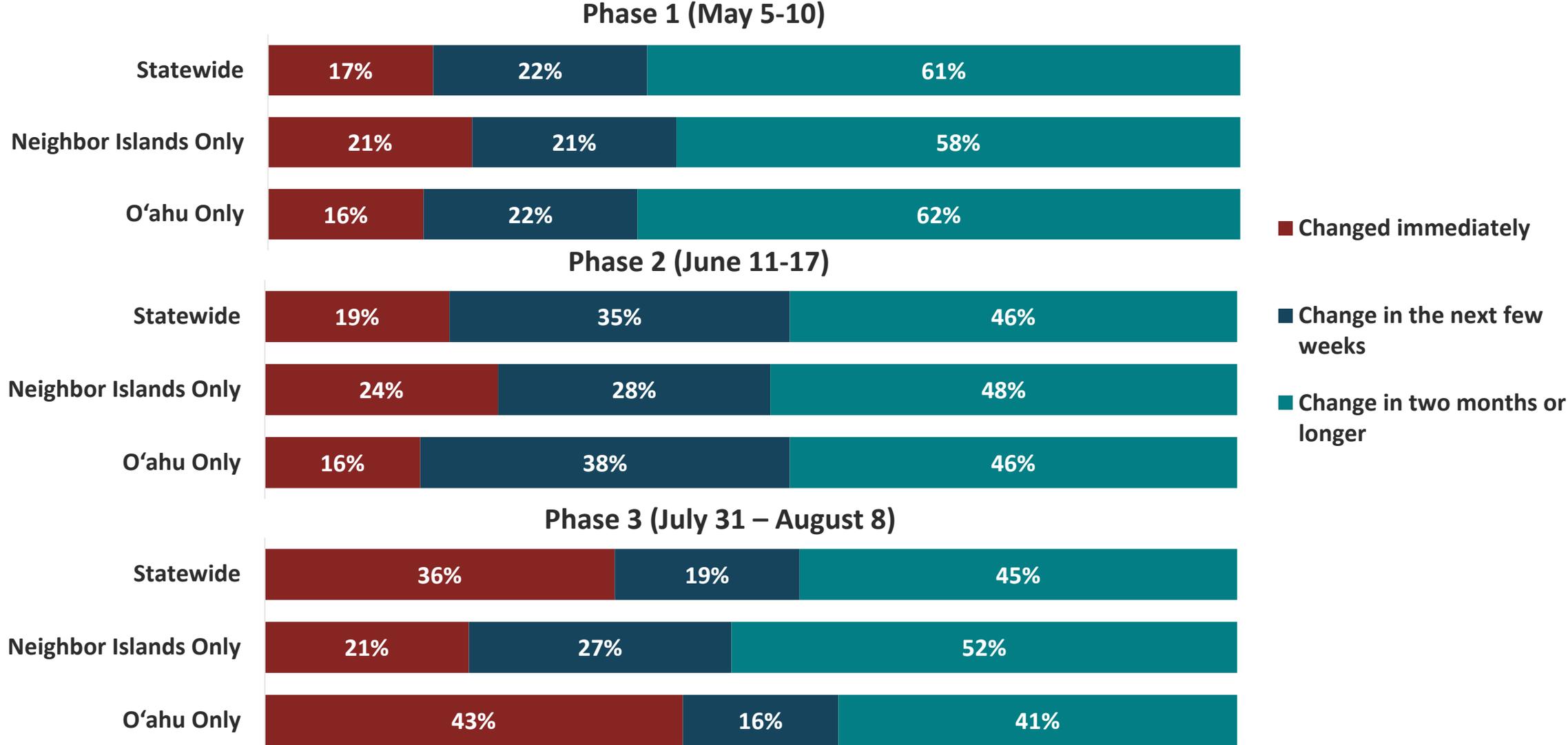
Historical Perspective: Leisure Travel Expectations (Trips Taken)

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)

How rapidly do you think the policy of discouraging tourists from coming should be changed?



Source: HVCB analysis of SMS Community Pulse Survey

Social Media



Message Strategy

Attract visitors who will leave Hawai'i better than when they arrived.

We'll let visitors know that it's not only time to come back to Hawai'i. It's time to give back to Hawai'i.



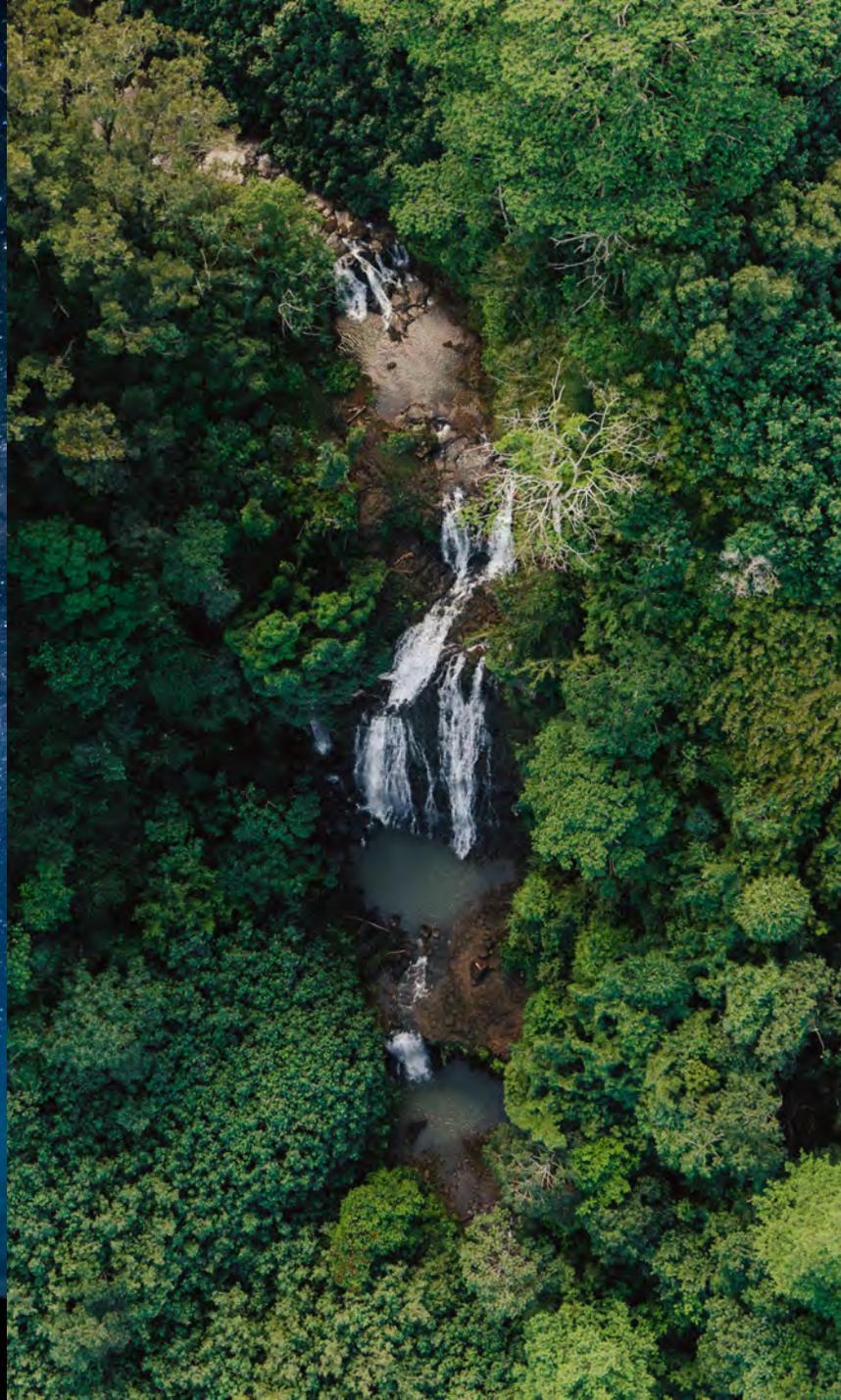


Creative Direction

CONTENT MOOD BOARD

Nothing But Nature

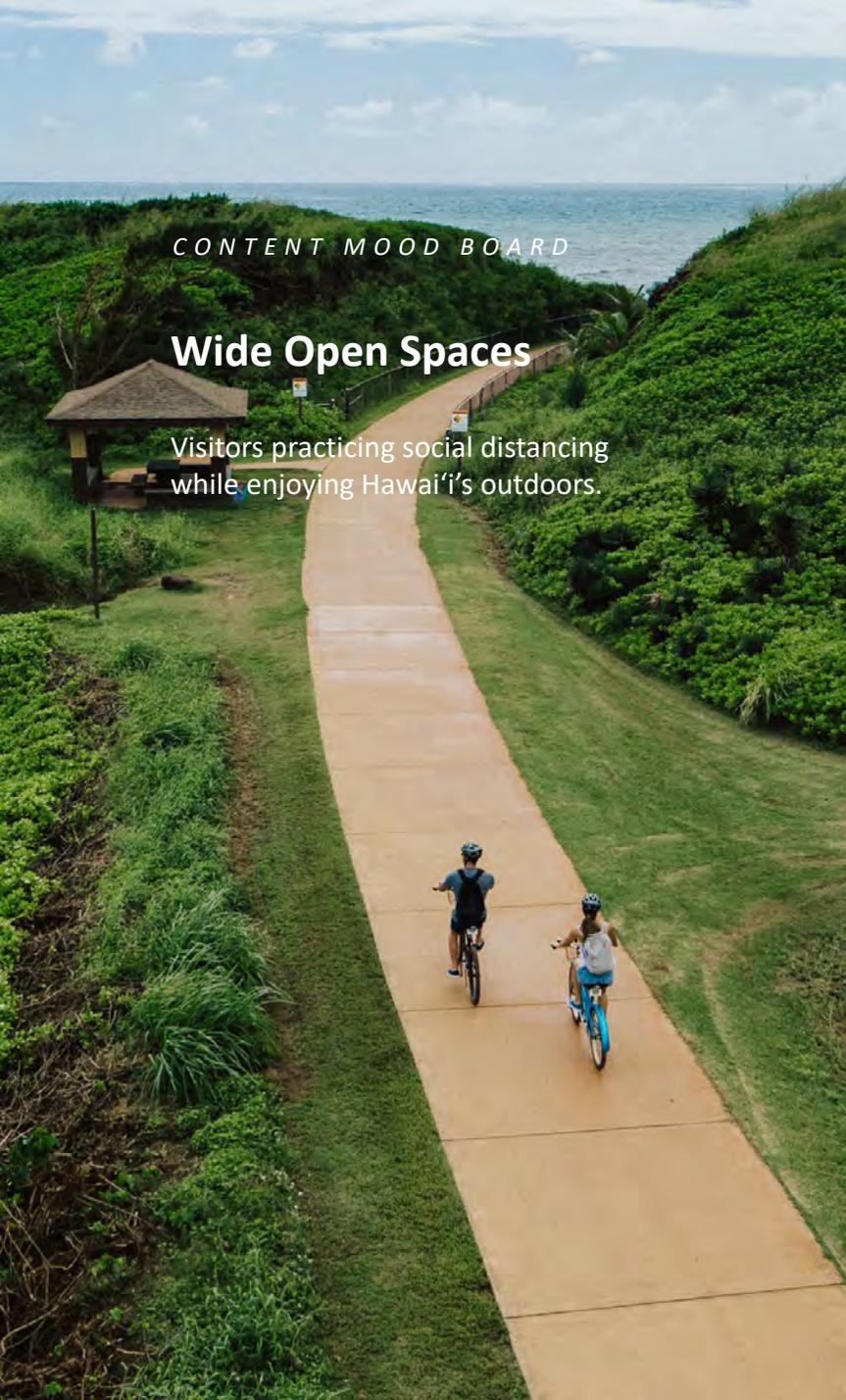
Hawai'i's nature shown dynamically, without people, as a reminder of its breathtaking natural beauty.



CONTENT MOOD BOARD

Wide Open Spaces

Visitors practicing social distancing while enjoying Hawai'i's outdoors.



CONTENT MOOD BOARD

In The Moment

Peaceful and reflective moments while connecting with authentic experiences.

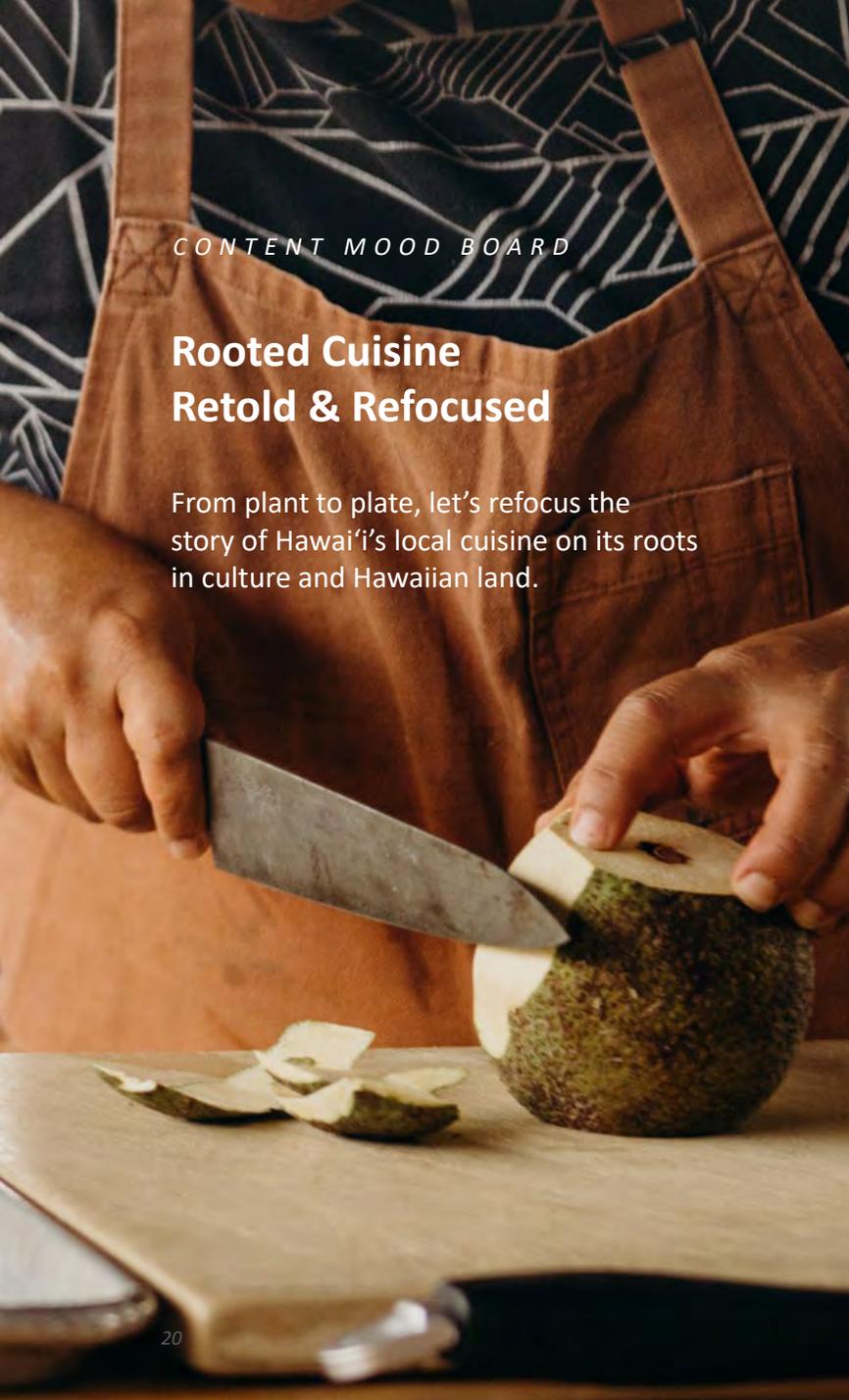


CONTENT MOOD BOARD

Cuisine in the Outdoors

Hawai'i's local to-go cuisine can be highlighted and paired with soft adventure to encourage distanced experiences.



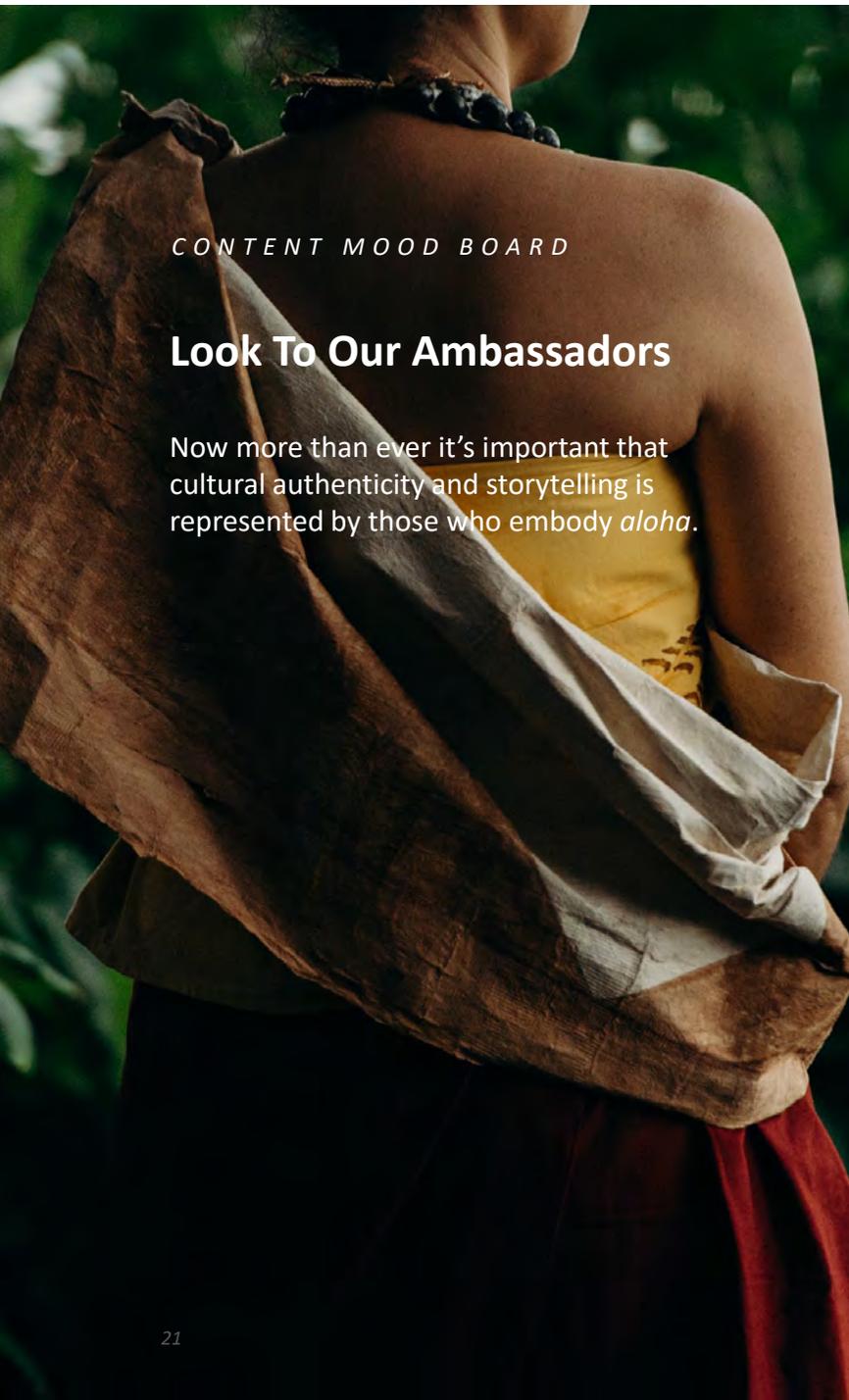


CONTENT MOOD BOARD

Rooted Cuisine Retold & Refocused

From plant to plate, let's refocus the story of Hawai'i's local cuisine on its roots in culture and Hawaiian land.





CONTENT MOOD BOARD

Look To Our Ambassadors

Now more than ever it's important that cultural authenticity and storytelling is represented by those who embody *aloha*.



CONTENT MOOD BOARD

Giving Back To Hawai'i

Volunteer activities that show how visitors can experience the Hawaiian Islands in a more meaningful way.



HOW IT COMES TO LIFE

Social Ads

We are creating a balanced mix of social ads, purpose-fit for our priority platforms.

Facebook & Instagram

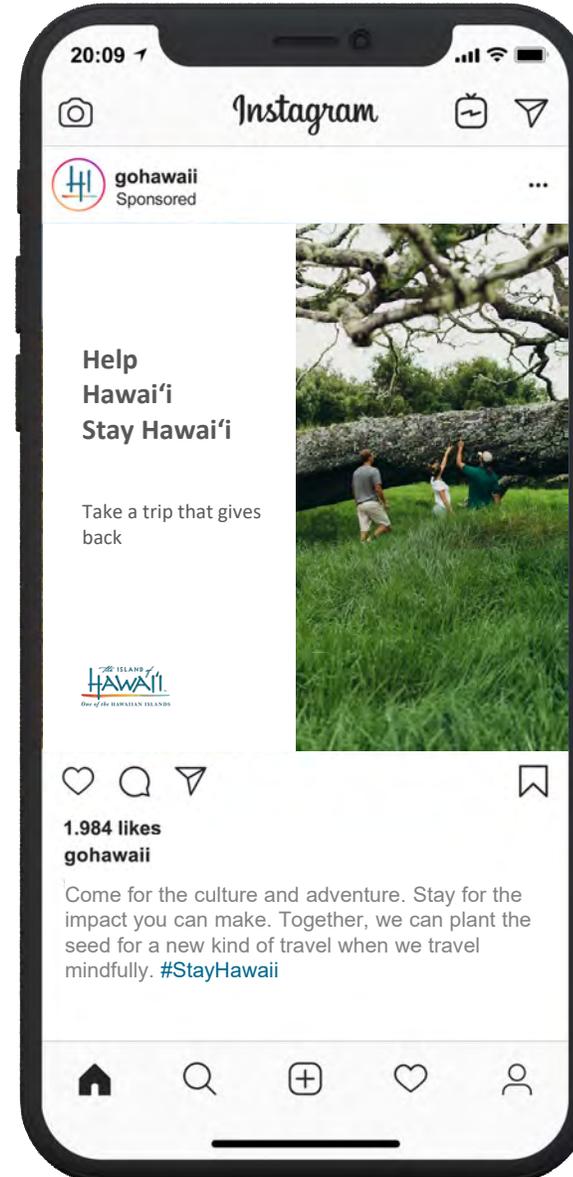
Use engagement with *kuleana*/on-island videos to identify past visitors, promote Launch video and follow up with a steady cadence of supporting content throughout the flight

YouTube

Build on the success of *This Is Hawai'i* series from early 2020 with True View pre-roll ahead of videos watched by our audiences—especially videos related to community engagement, mindfulness, or slow travel

Pinterest

Show up interactively on a platform where people come to feel inspired, positive, safe (and politics-free) while they dream and plan



Social Creative Units



HOW IT COMES TO LIFE

Mindful Travel Guide

We're introducing a new way to experience Hawai'i. To complement our website landing page, we'll create a **guide for traveling mindfully in Hawai'i** (e.g. take a guided tour, look for volunteer activities) to help visitors travel with intent – then drive them to GoHawaii.com to learn more.

Distribution Channels:

- Pin Extension – Custom, premium, interactive experience that enables Pinner's with expressed intent to dive deeper into curated activities
- Facebook & Instagram Lead-Gen Ads – One-click opt-in for a downloadable Guide; facilitates lookalike modeling and builds email database
- Custom Designed Email – Invite email list subscribers to explore experiences curated on landing page



Upon opening, user can swipe up into custom experience.

A scenic photograph of a waterfall cascading down a dark, mossy rock face. The water is white and frothy as it falls into a pool below. The surrounding area is a dense, lush forest with various green plants and trees. The lighting is natural, highlighting the textures of the rocks and the vibrant colors of the foliage.

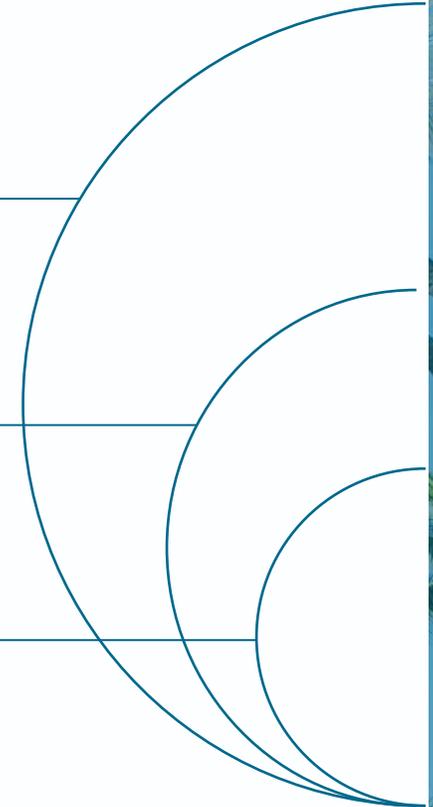
Paid Social Targeting Strategy

More than ever before, a targeting approach employing parameters that signal a particular *mindset* will be key to identifying the right people to serve with our content and attract as visitors to Hawai‘i

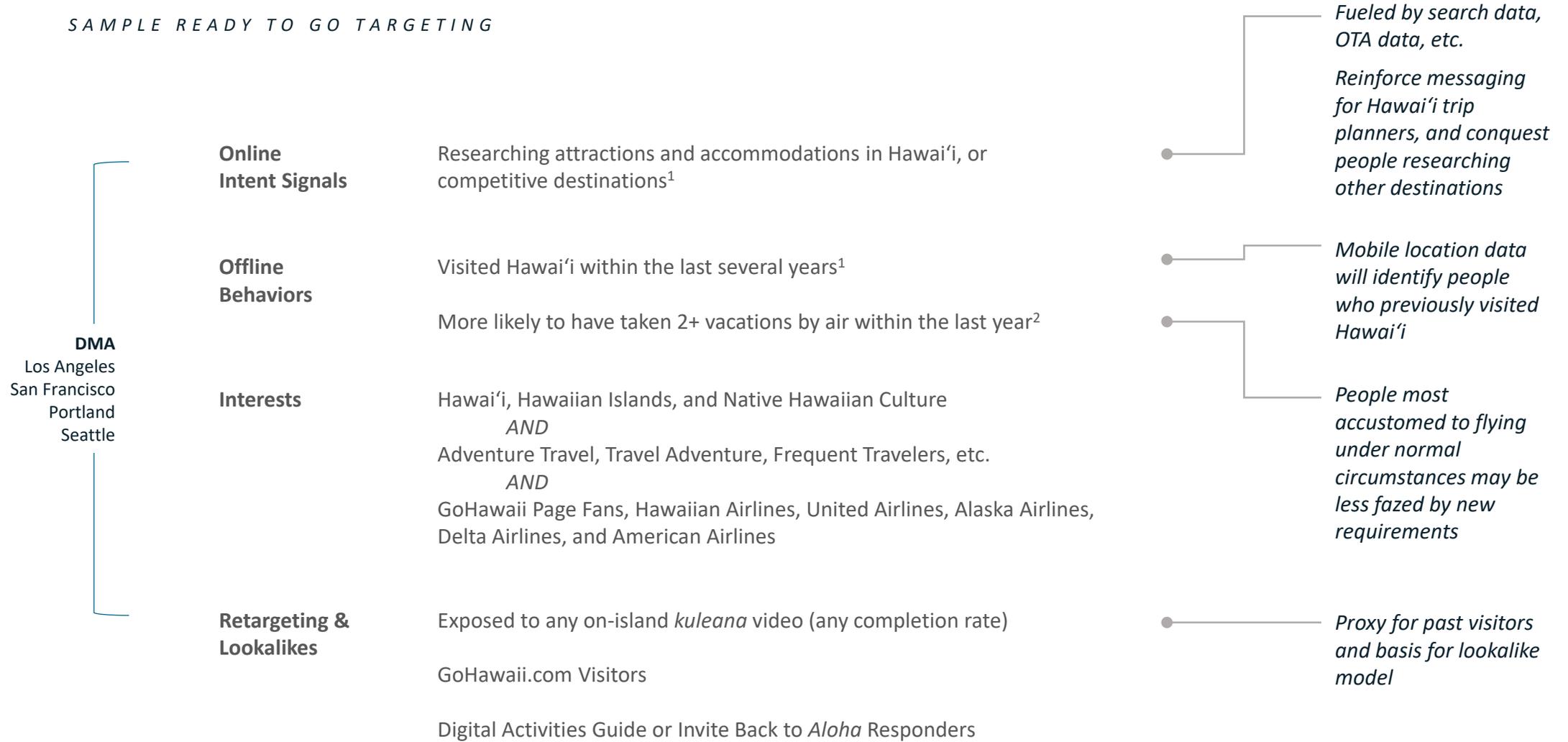
Ready to Go

Mindful Traveler

Ready to Give



SAMPLE READY TO GO TARGETING



¹ Sourced from third party data providers

² Identified via Edelman Earned Signal Platform

SAMPLE MINDFUL TRAVELER TARGETING

<p>DMA Los Angeles San Francisco Portland Seattle</p>	<p>Online Intent Signals</p>	<p>Posting or engaging with social content that indicates concern or empathy for others²</p> <p>Engaged by news coverage related to cultural awareness, environmental impact, wellness, or health and safety²</p>	<p>● —————</p>	<p><i>Keyword queries paired with sentiment— especially as related to COVID-19 and mitigation factors—can help identify people with a mindful orientation</i></p>
	<p>Offline Behaviors</p>	<p>More likely to self-assess as tolerant, kind, good-hearted, reserved, quiet, etc.²</p> <p>More likely to engaged in highly-correlated behaviors (e.g., recycling)^{1,2}</p>	<p>● —————</p>	<p><i>We'll identify behaviors that are highly correlated with those we want visitors to exhibit</i></p>
	<p>Interests</p>	<p>Cultural institutions, mindfulness and guided meditation apps, climate, the environment, ocean health, etc.</p>		
	<p>Retargeting & Lookalikes</p>	<p>Viewed any on-island <i>kuleana</i> video (high completion rate)</p> <p>Curated Landing Page visitors</p> <p>Most engaged by associated social content</p>	<p>● —————</p>	<p><i>Proxy for <u>mindful</u> past visitors and basis for lookalike model</i></p>

¹ Sourced from third party data providers

² Identified via Edelman Earned Signal Platform

SAMPLE READY TO GIVE TARGETING

<p>DMA Los Angeles San Francisco Portland Seattle</p>	<p>Online Intent Signals</p>	<p>Likelihood to participate in volunteering when traveling¹</p>	<p>● ————— <i>Third party behavioral segments can help us identify people likely to volunteer while traveling—an important distinction from people who are likely to volunteer more generally</i></p>
	<p>Offline Behaviors</p>	<p>More likely to report willingness to volunteer for a good cause²</p>	
	<p>Interests</p>	<p>Volunteer Travel, Volunteering, Community Service, Ecotourism, Philanthropy, etc.</p>	
	<p>Retargeting & Lookalikes</p>	<p>Curated Landing Page visitors and/or relevant listing viewers</p> <p>Most engaged by associated social content</p>	<p>● ————— <i>Actively researching volunteer-related listings at GoHawaii.com</i></p>

¹ Sourced from third party data providers

² Identified via Edelman Earned Signal Platform

HOW IT COMES TO LIFE

Paid Support Plan

	Facebook & Instagram	YouTube	Pinterest
STAY HAWAII SUPPORTED ELEMENTS	Stay Hawai'i Launch video and content series Safety & Protocol Updates (<i>as needed</i>) Mindful Travel Guide Lead Gen Ads Post-Arrival <i>Kuleana</i> Ads	Stay Hawai'i Launch video and content series Safety & Protocol Updates (<i>as needed</i>)	Stay Hawai'i Launch video and content series Safety & Protocol Updates (<i>as needed</i>) Mindful Travel Guide Pin Extension
FLIGHTING & TARGETING	Flight Dates tbd – potentially scale back media around Presidential Election to align with OMD media plan “Ready to Go”, “Mindful Traveler” and “Ready to Give” Audiences Interest-based segments and Retargeting	Flight Dates tbd – potentially scale back media around Presidential Election to align with OMD media plan “Ready to Go”, “Mindful Traveler” and “Ready to Give” Audiences Travel, mindfulness and volunteering Keywords, Interests, and Affinities	Flight Dates tbd – stay in market through election season, as platform is respite from political advertising “Ready to Go”, “Mindful Traveler” and “Ready to Give” Audiences Travel, mindfulness and volunteering Keywords, and Interests

It's Time video goes here



Respectful Visitors

HOW IT COMES TO LIFE

Earned Media

Media will be covering the re-opening of our state to tourism. Let's use the comm's opportunity to create a more emotional connection around the announcement, aligned with our values.

“Open Letter” Invitation:

Following up from our Share *Aloha* video, we'll issue an invitation to return to Hawai'i that comes with our ask to give back.

Hotel Partnership:

Let's team up with local hotels to promote a limited-time offer to extend visitor stays for free – but only if they commit to giving back.

TRAVEL+ LEISURE

“Hawai'i Is Welcoming Visitors With An Extended Free Stay. Here's Why.”

An open letter from the people of Hawai'i

In Hawai'i, sharing the *aloha* spirit means welcoming all with open arms. But this year, that was the one thing we couldn't do.

Six months ago, we closed our islands to the world. We asked that you stay home while we stayed focused on keeping our local communities healthy and safe.

Today, we are ready to announce the Hawaiian Islands are reopening and we are welcoming you to stay with us again. But this comes with an ask: not just to come back, but to give back.

This is more than an invitation to return, this is an invitation to restore. To rebuild. To help us come back stronger than ever. By treading lightly and exploring mindfully, while taking the time to truly get to know each island and the stories and people that make them so special.

That is the agreement we make with nature every day. It's our *kuleana* (responsibility) to leave the land better than we found it. And it's our ask that you help us do the same.

Together, we can help Hawai'i stay Hawai'i.

Mahalo and welcome back,
The Hawaiian Islands

HOW IT COMES TO LIFE

Kama'āina Staycation

This extended stay offer isn't just for visitors. Let's include our community by providing the same offer to Hawai'i residents.

Building on the current kama'āina hotel initiatives, this will be a unique opportunity to create positive local and visitor interactions.



“Marriott Enhances Kama'āina Discount with Extended Staycation”

A wide-angle, high-angle photograph of a mountain range. The mountains are covered in dense, vibrant green vegetation, likely a tropical forest. The peaks and ridges are partially shrouded in a light, hazy mist or fog, creating a sense of depth and atmosphere. The sky is a pale, clear blue. The overall scene is serene and majestic.

Mahalo