

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



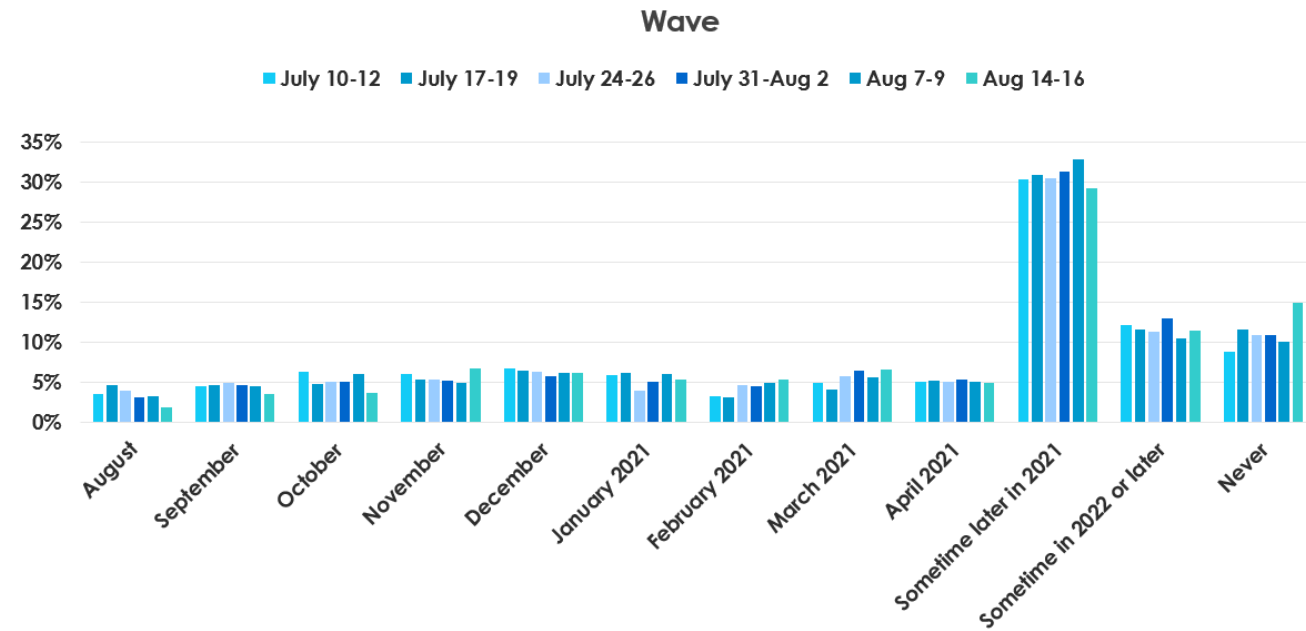


Market Insights

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.

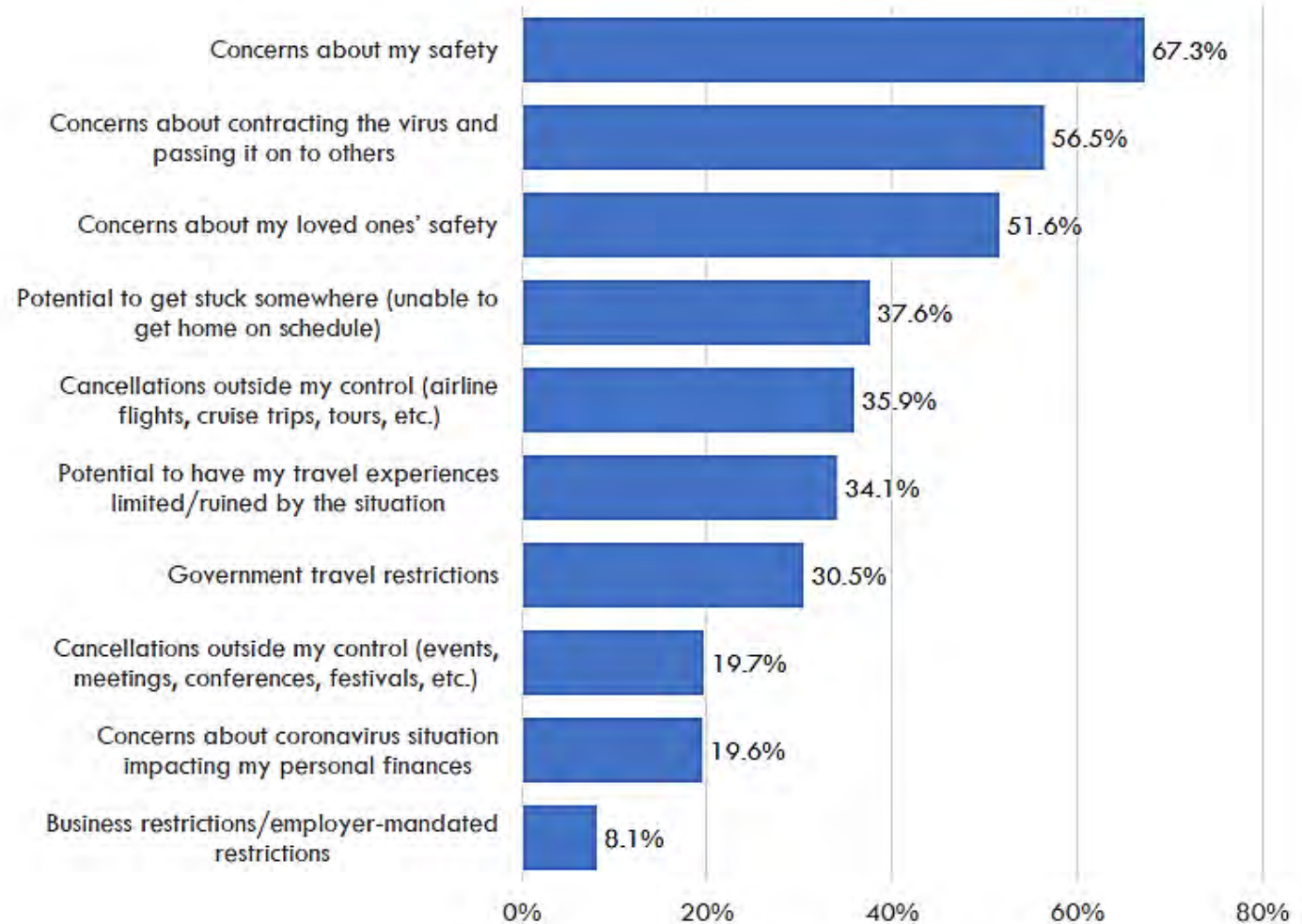


Source: Destination Analysts Coronavirus Travel Sentiment Index Report Waves 18-23

Why the Coronavirus is Impacting Travel

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

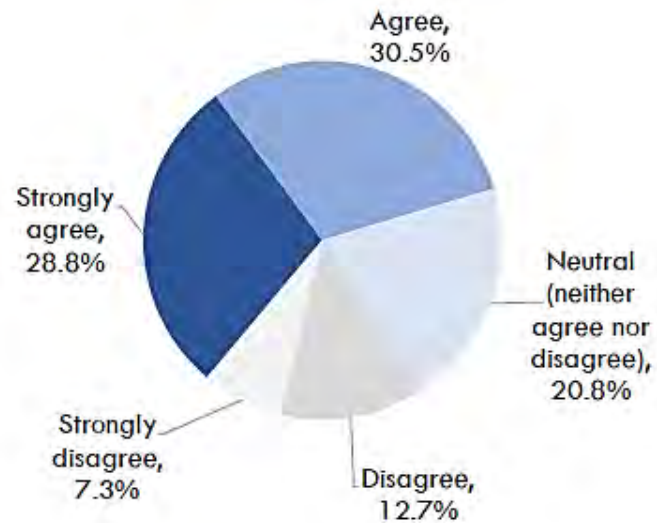
(Base: Wave 23. Respondents whose travel was impacted by the coronavirus, 916 completed surveys. Data collected Aug 14-16, 2020)



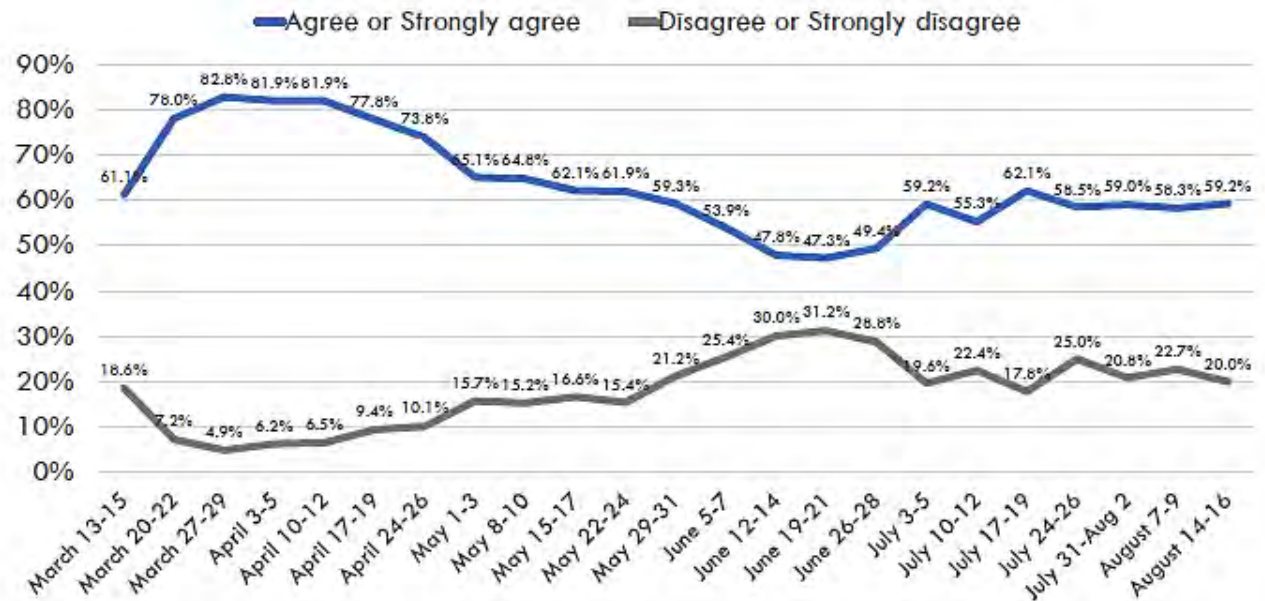
Avoiding Travel until the Crisis Blows Over

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

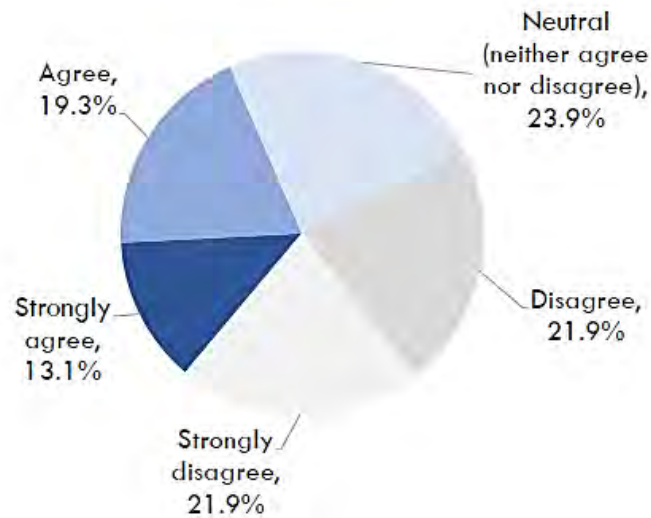


(Base: Waves 1-23. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201 and 1,202 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3,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

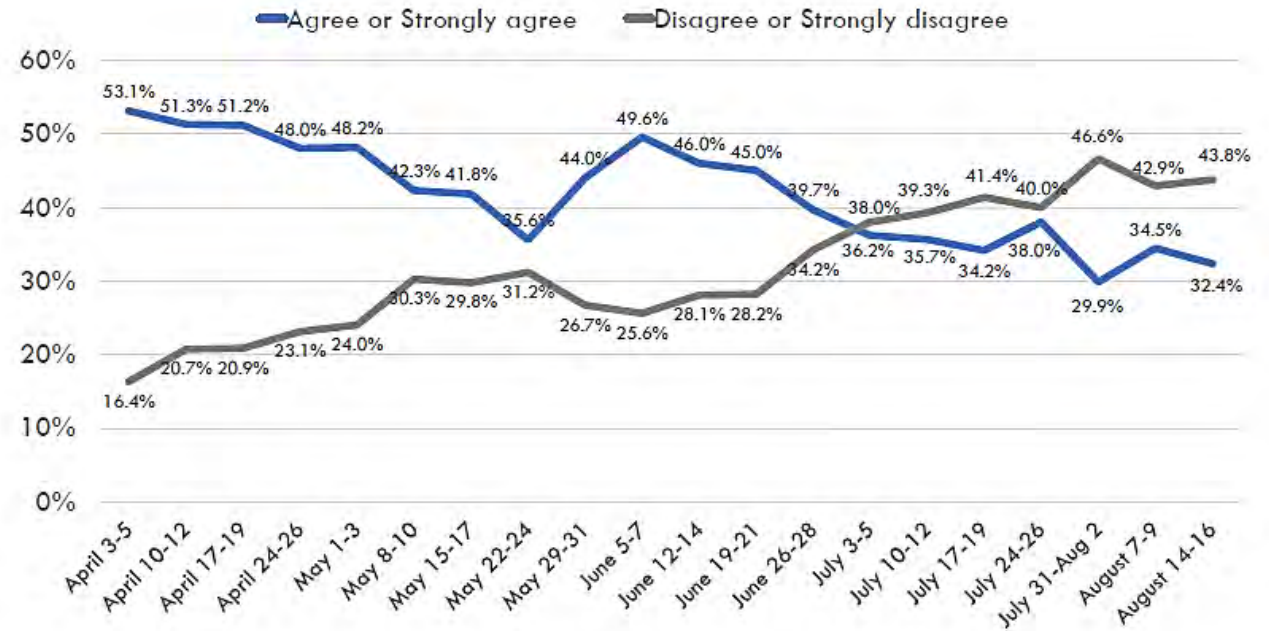
Expectations for Traveling in the Fall

How much do you agree with the following statement?

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



Historical data



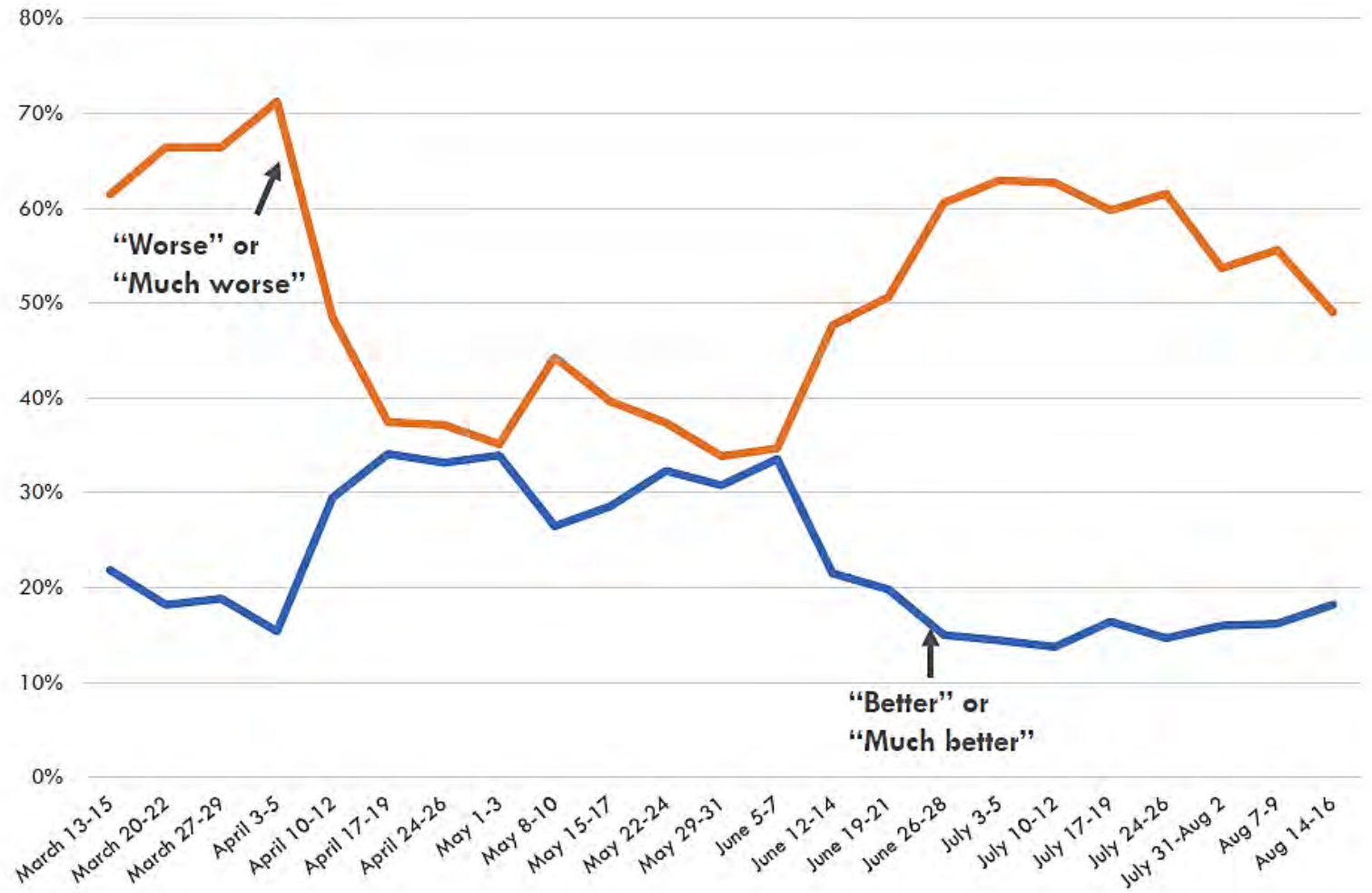
(Base: Waves 4-23. All respondents, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201 and 1,202 completed surveys. Data collected April 3-5, 10-12, 17-19, 24-26, May 1-3, 8-10, 15-17, 22-24, 29-31, June 5-7, 12-14, 19-21,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

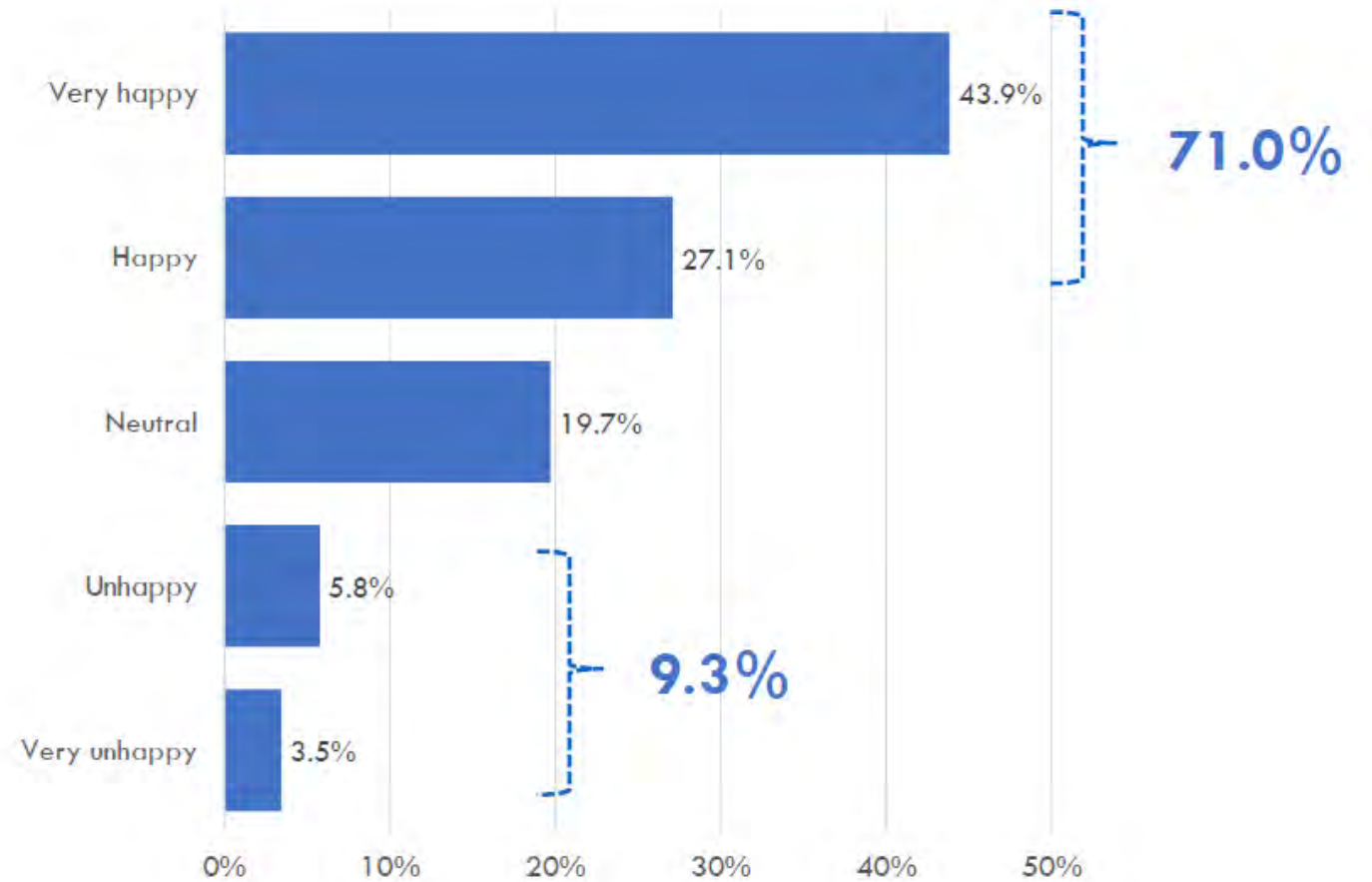
(Base: Waves 1-23. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201 and 1,202 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3, 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

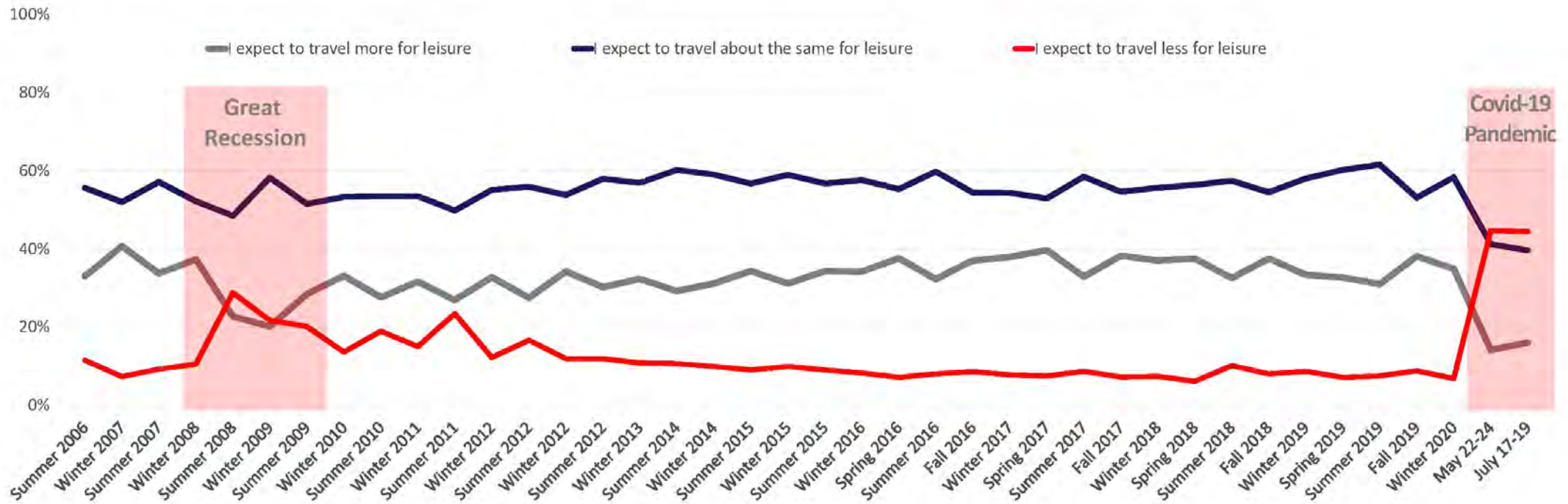
Question: Which best describes how you would feel if a destination you wanted to visit required visitors and residents to wear masks while in public?

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



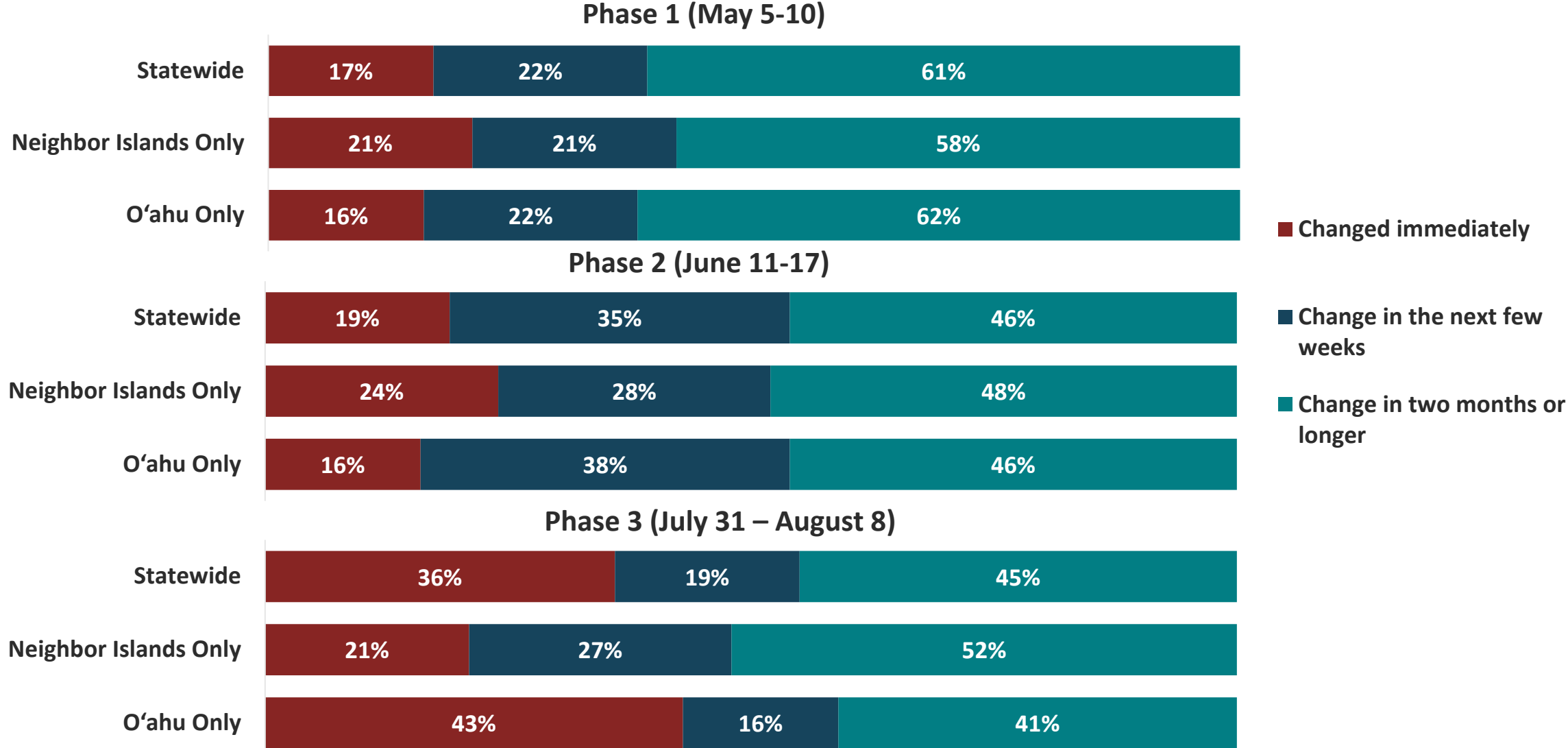
Historical Perspective: Leisure Travel Expectations (Trips Taken)

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.



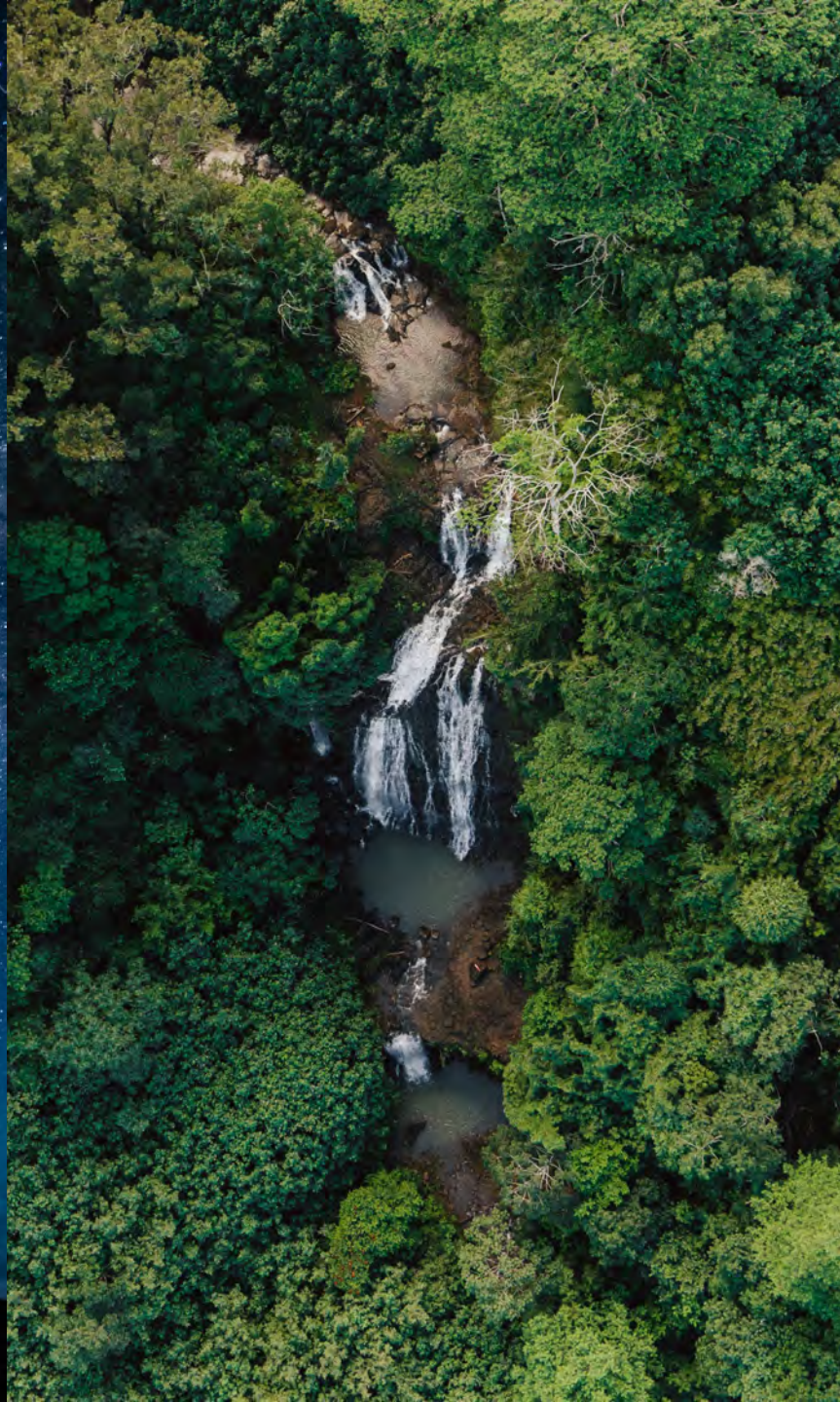


Creative Direction

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

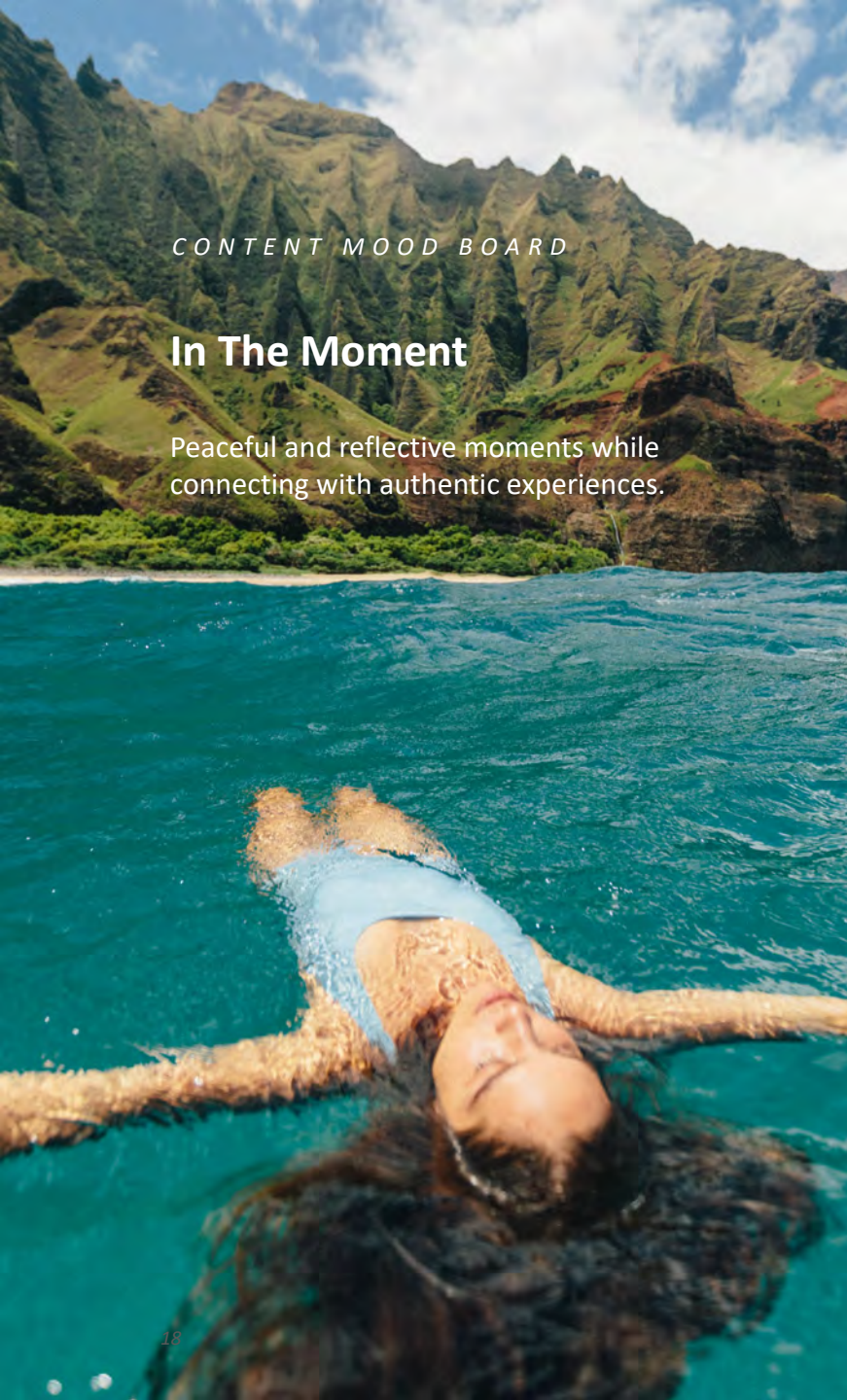
Visitors practicing social distancing while enjoying Hawai'i's outdoors.



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.



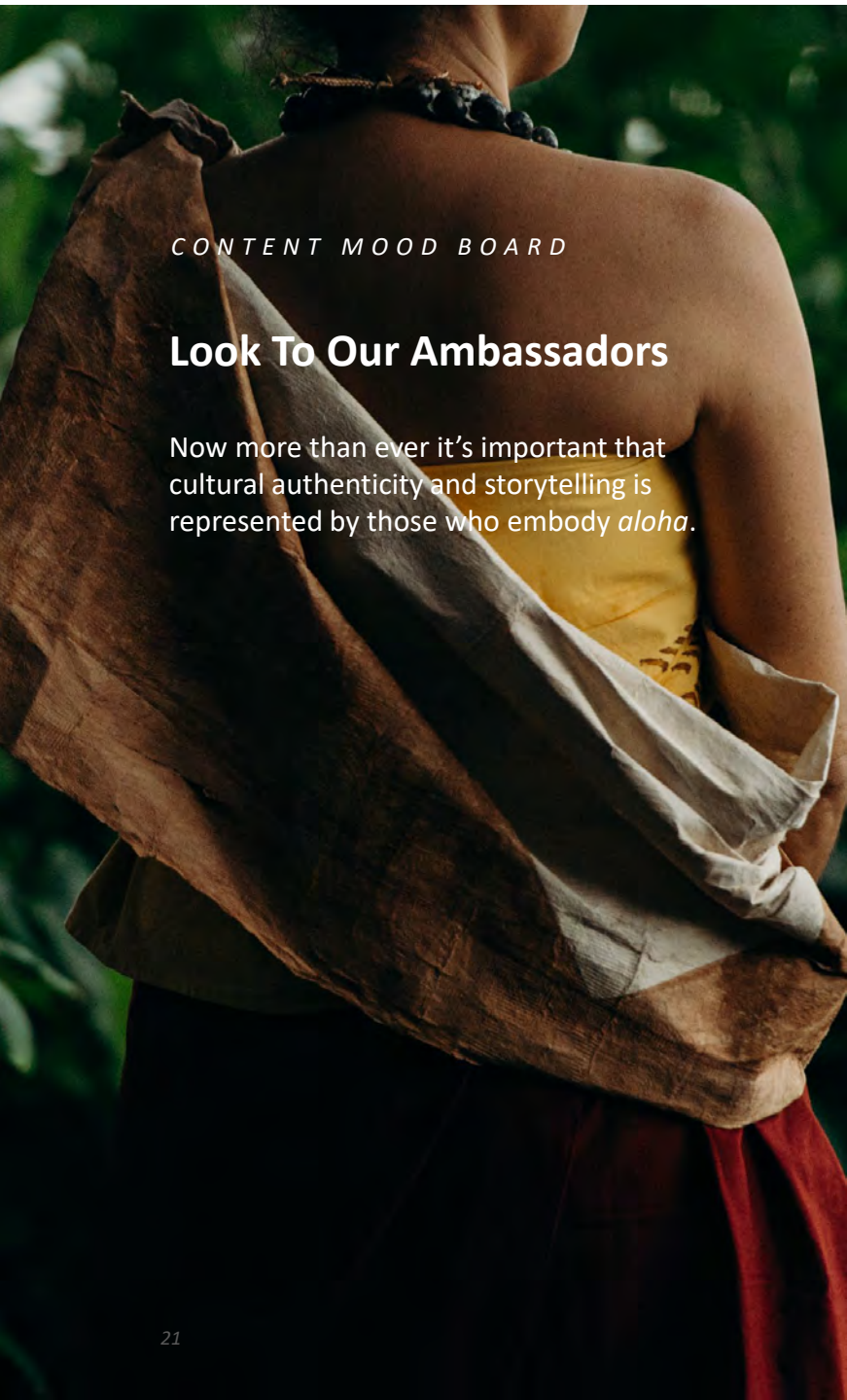


CONTENT MOOD BOARD

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

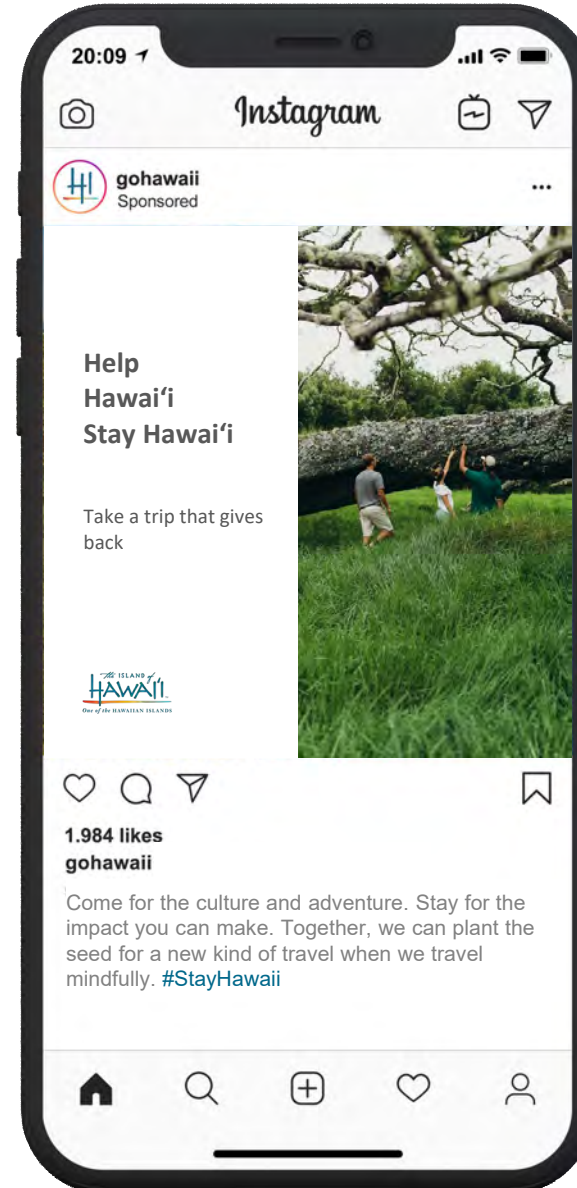
Use engagement with *kuleana*/on-island videos to identify past visitors, promote Launch video and follow up with a steady cadence of supporting content throughout the flight

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 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

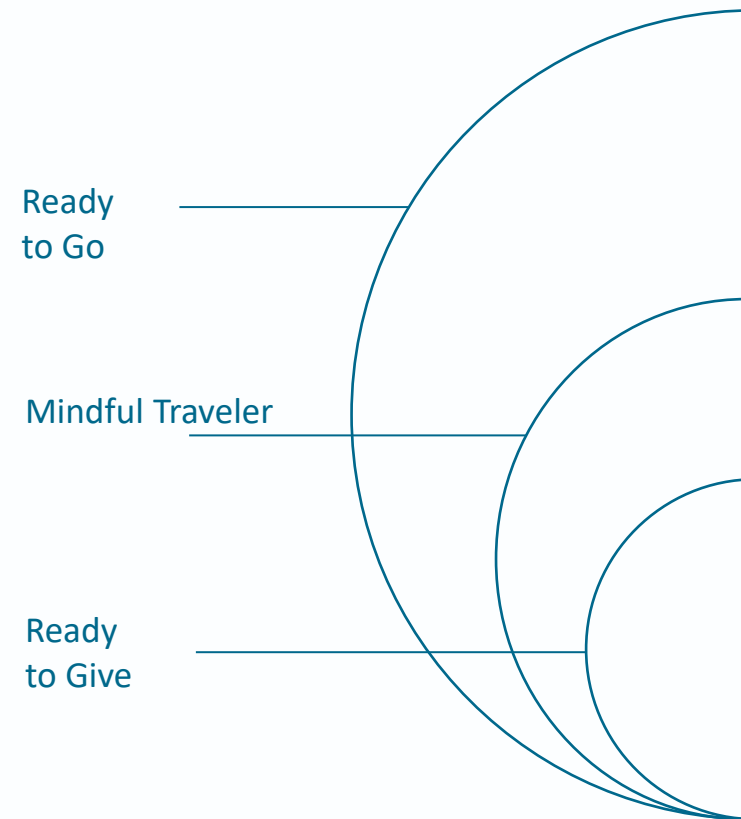


Upon opening, user can swipe up into custom experience.

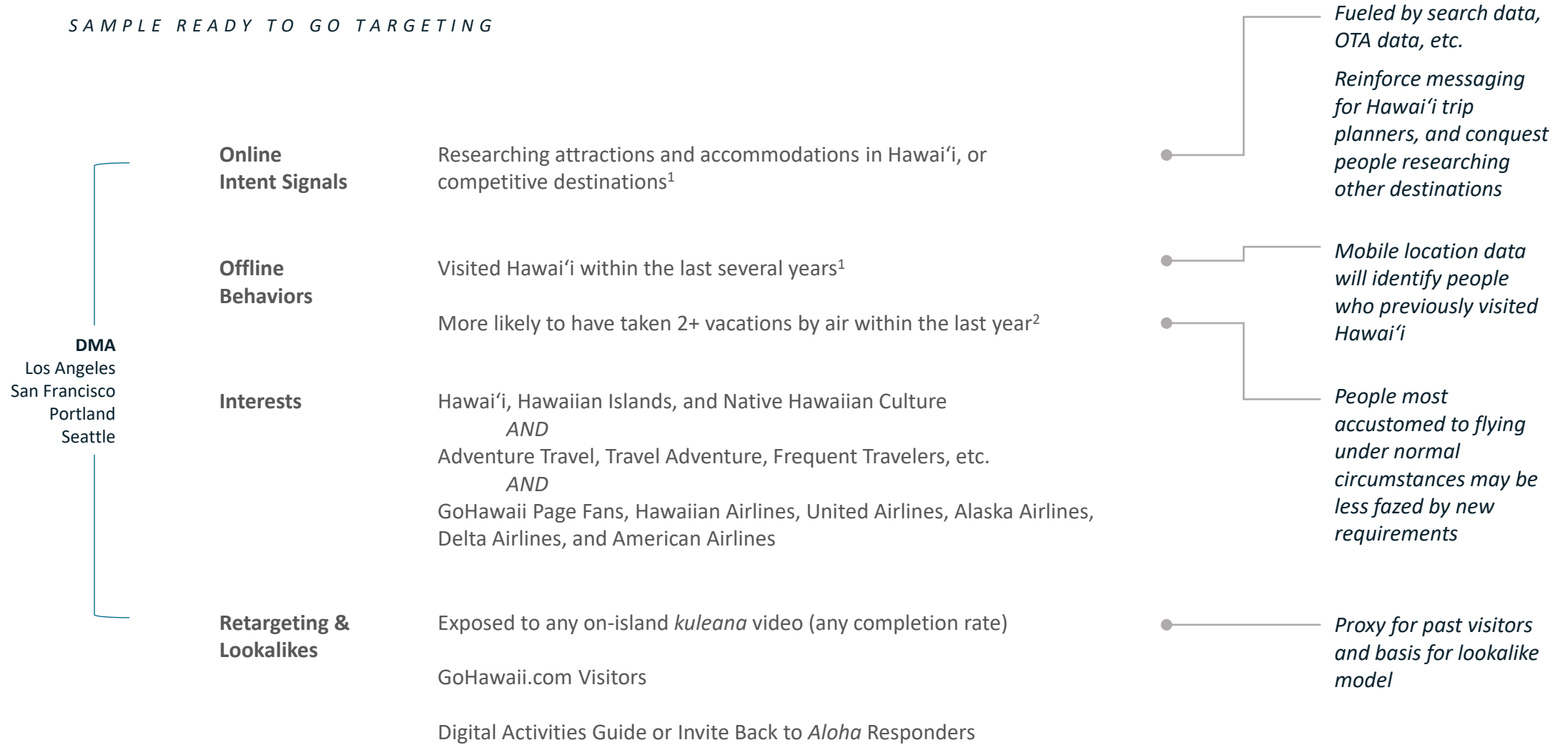


Paid Social Targeting Strategy

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



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>● ————— <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>● ————— <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>● ————— <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



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 terrain is rugged and layered, with many ridges and valleys. The atmosphere is hazy and misty, particularly in the upper right portion of the image, which softens the details of the distant peaks. The overall color palette is dominated by various shades of green, from deep forest greens to lighter, misty blues and greys.

Mahalo