



Hawai'i Tourism Authority

Marketing Standing Committee Meeting

Hawai'i Visitors & Convention Bureau Re-opening Plan Update

September 23, 2020

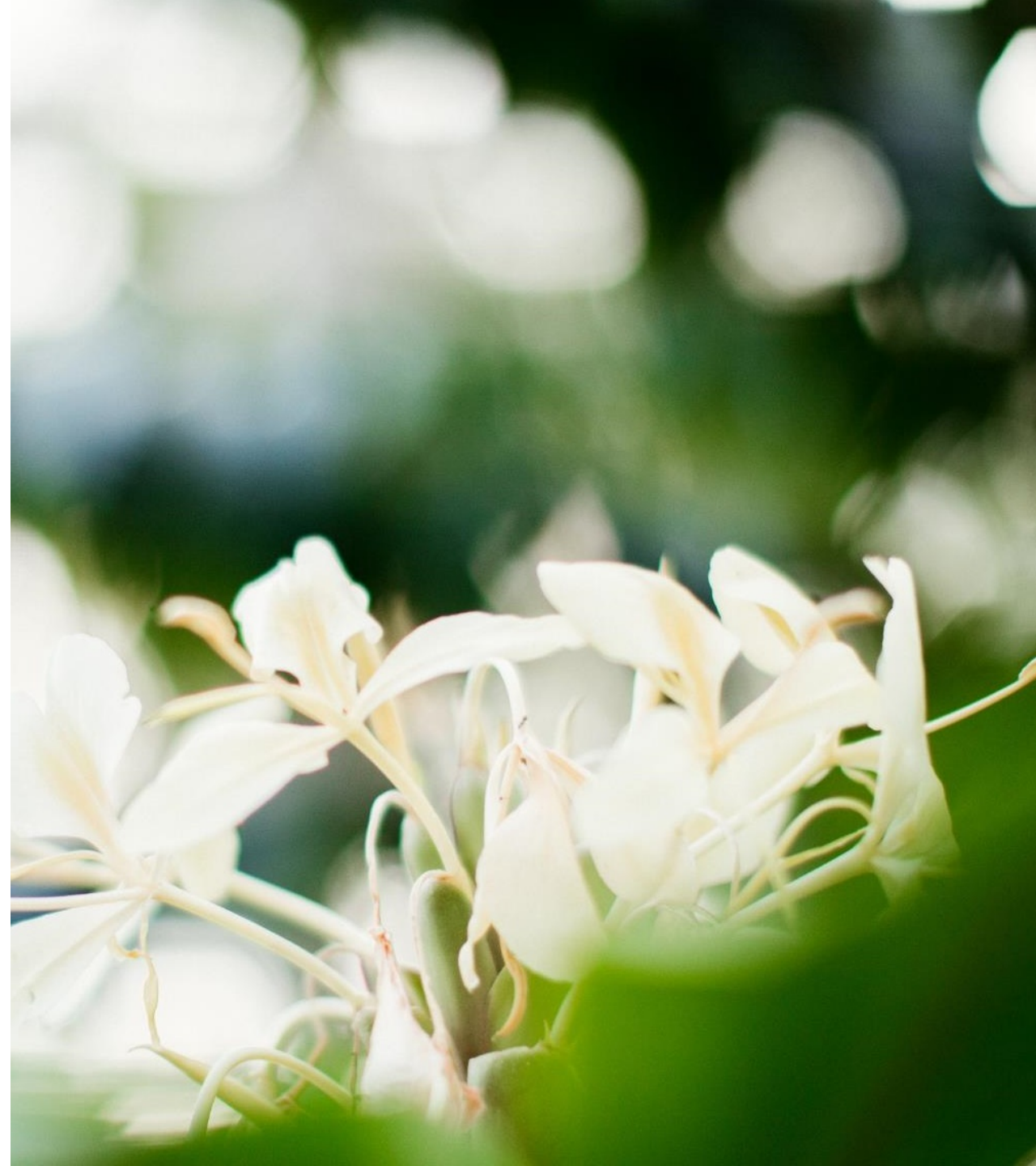
Agenda

1. Market Insights

- Travel Mindset

2. Communications Plan

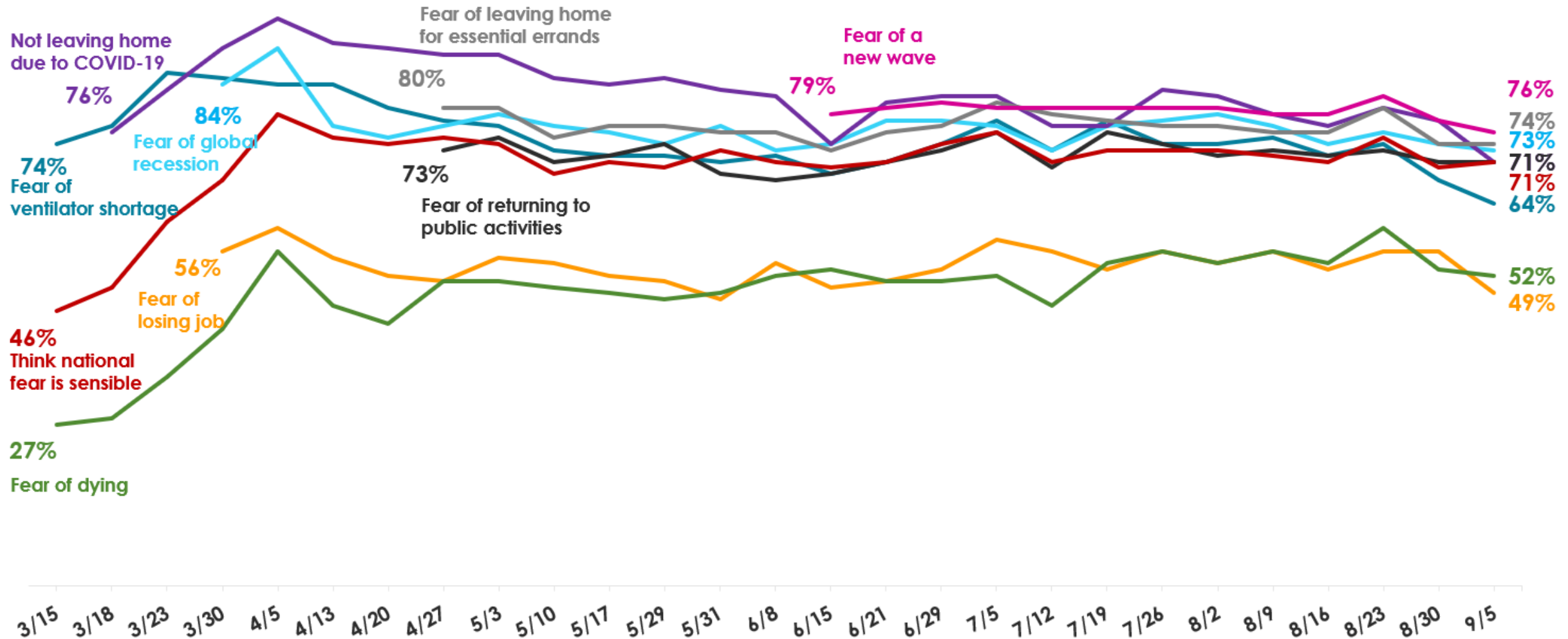
- Objective
- Overview
- Messaging
- Industry Partnership





Market Insights

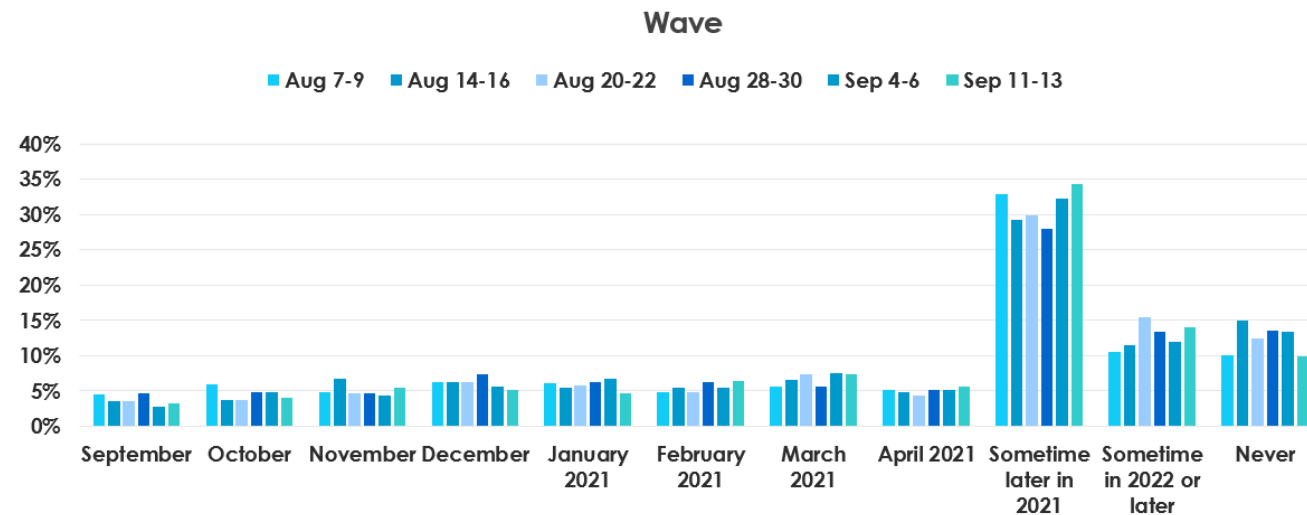
The Harris Poll: COVID-19 in the U.S. Working in an Environment of Fear



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

- 53.5 percent now say they'll probably take more regional trips while avoiding long-haul trips due to the coronavirus.
- The average distance away from home for American travelers' commercial airline trip is reported to be 1,007 miles.
- 83.5 percent of travelers expressed some level of concern for the national economy.
- 68.6 percent of Americans say they have some level of concern about contracting the virus.

Many American travelers are pushing their air trips to 2021. Over one-third (34.3%) said they expect to take their next commercial airline trip sometime next year and haven't decided on a specific date.



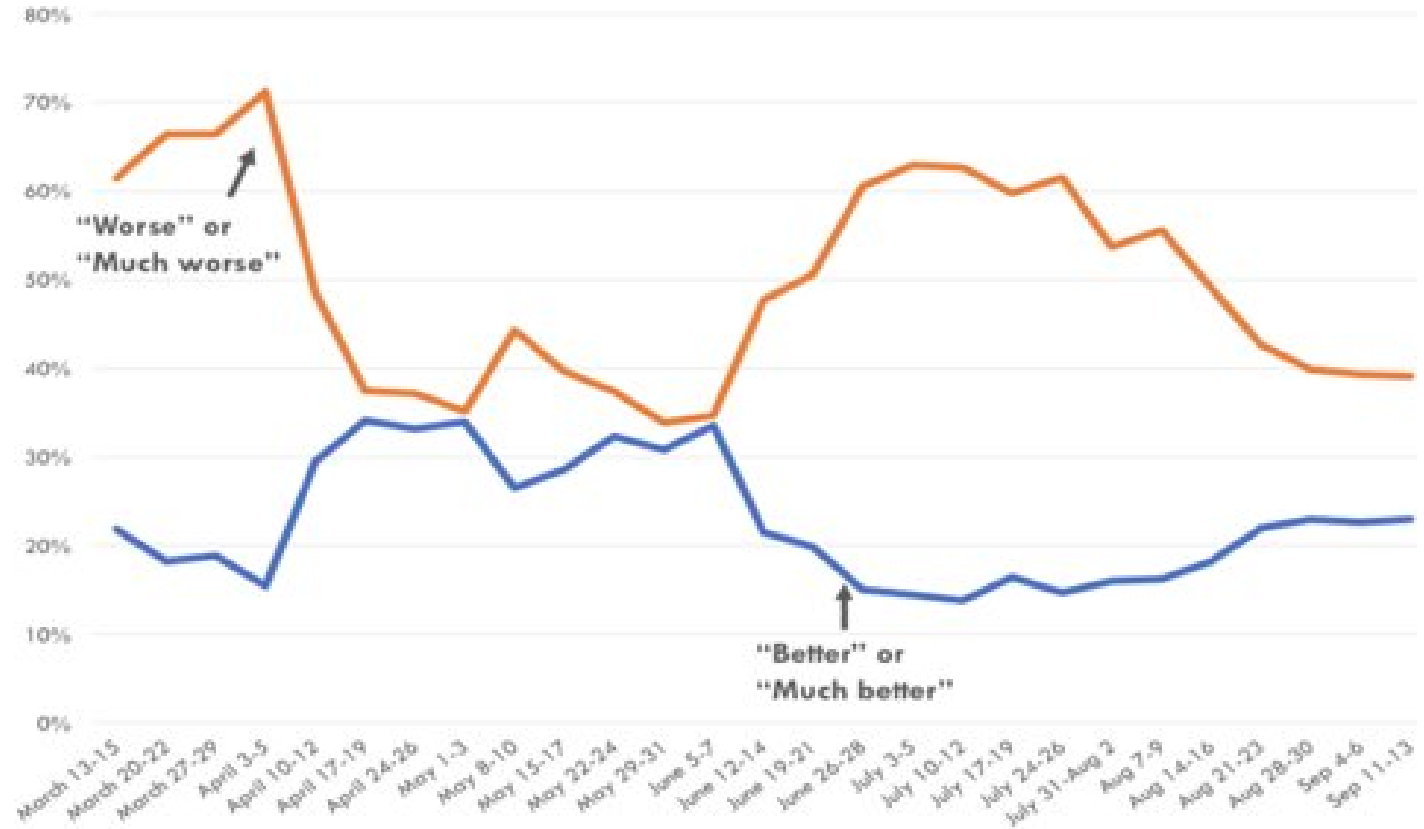
Source: Destination Analysts Coronavirus Travel Sentiment Index Report Waves 22-27

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 _____

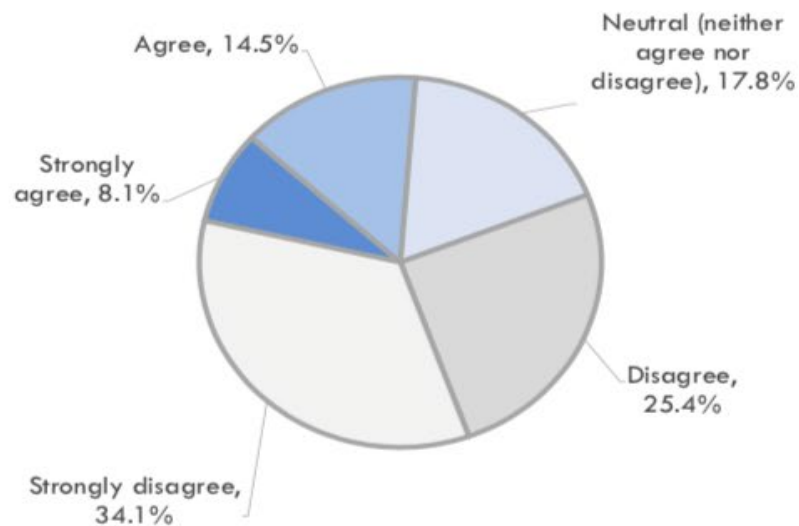
(Base: Waves 1-27. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225 and 1,205 completed surveys.)



Expectations for Pandemic's Course at the End of 2020

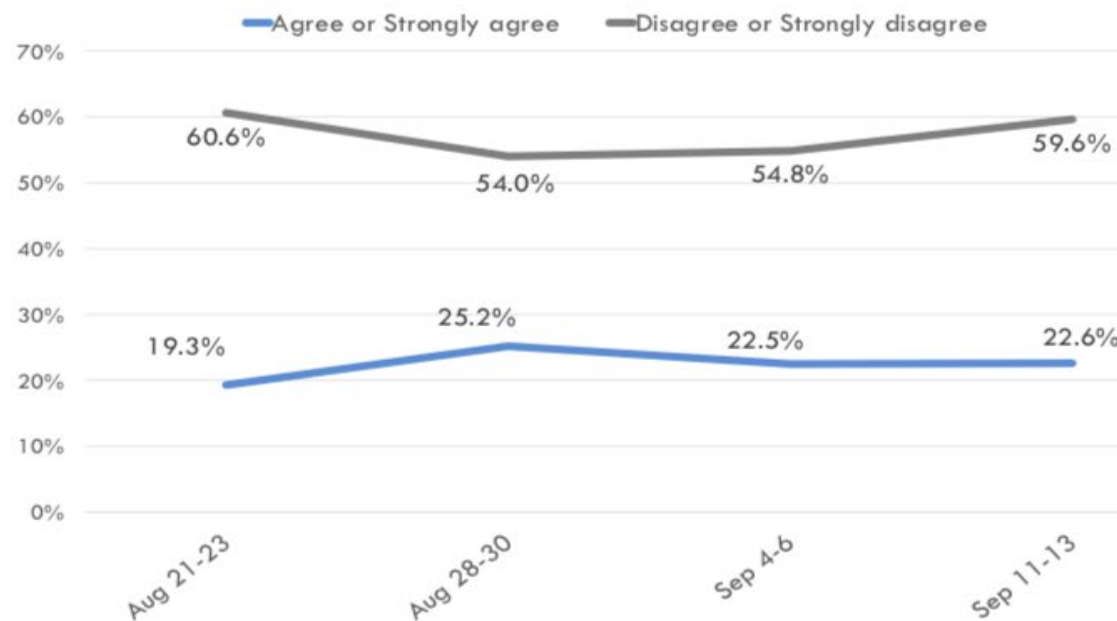
How much do you agree with the following statement?

Statement: I expect the Coronavirus situation will be resolved BEFORE THE END OF THIS YEAR.

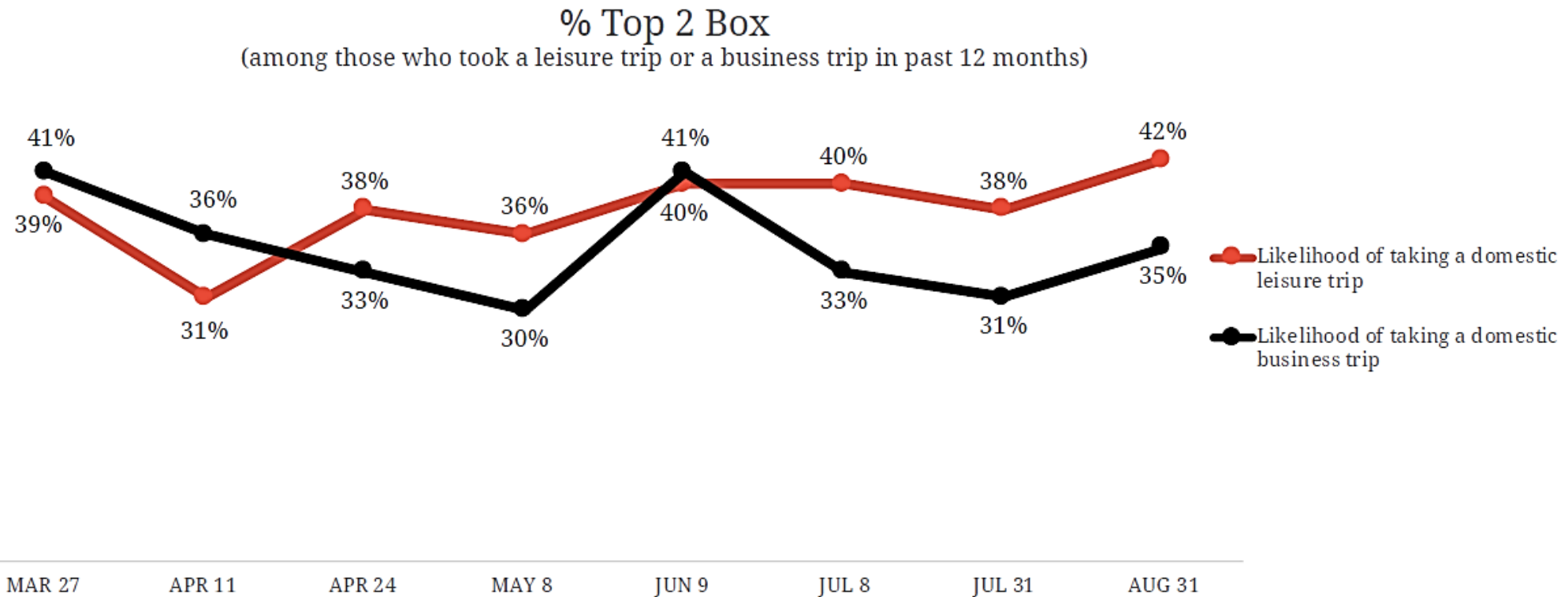


(Base: Waves 24-27. All respondents, 1,207, 1,250, 1,225 and 1,205 completed surveys.)

Historical data

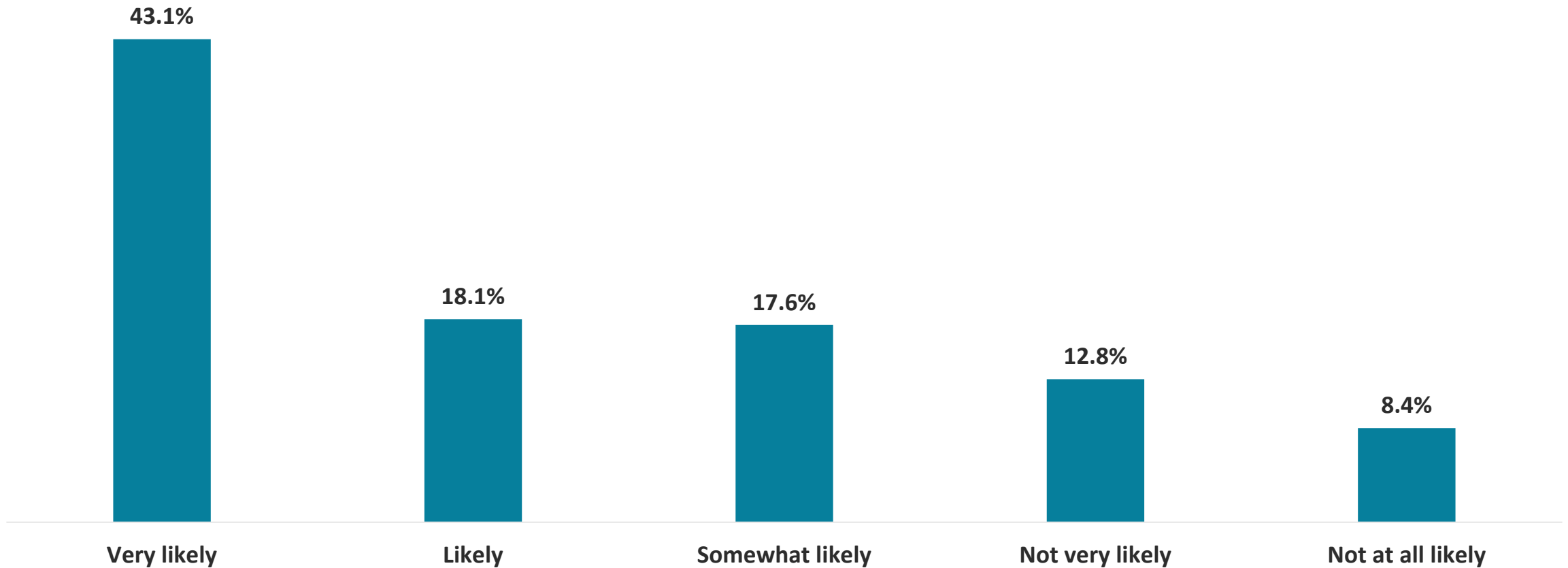


Likelihood of taking a domestic leisure trip in the next six months

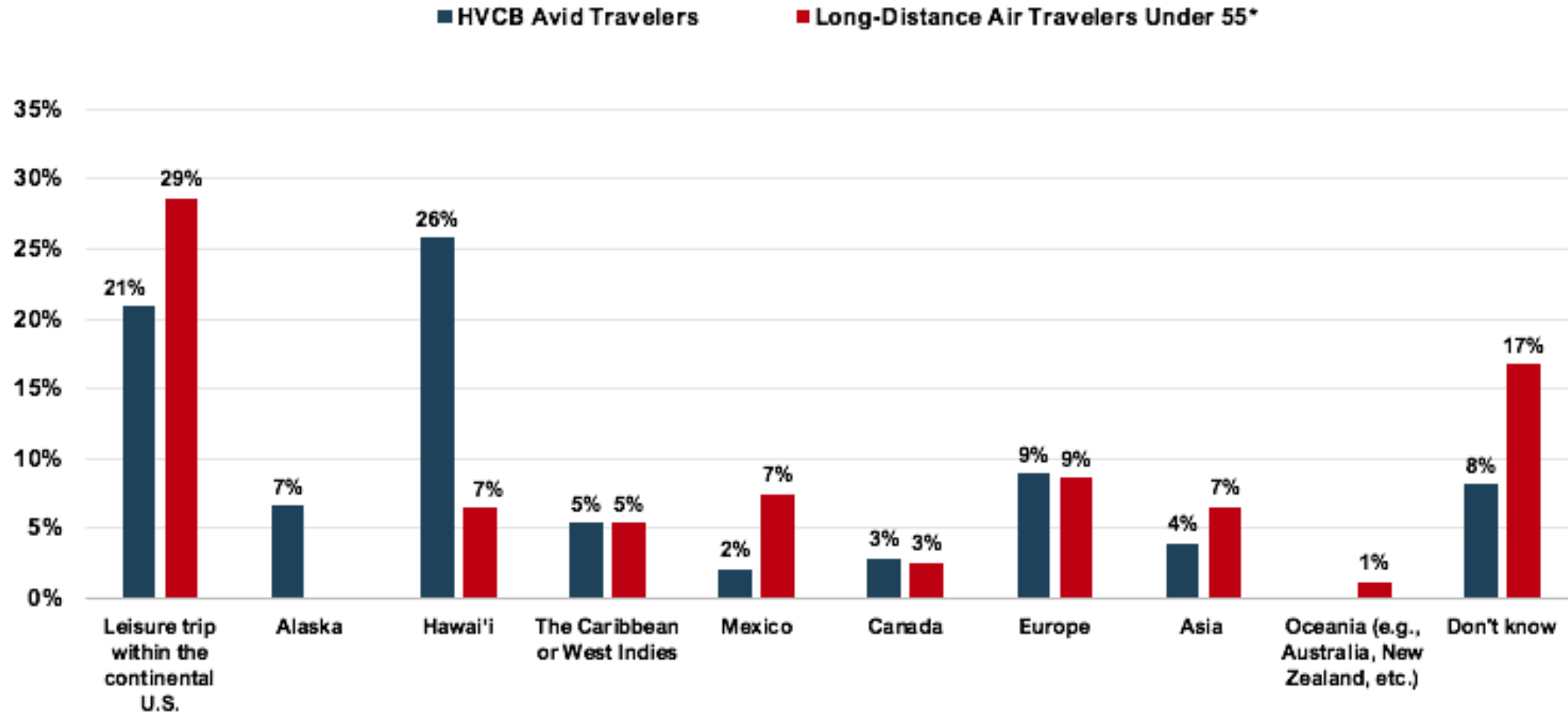


Question / Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months? (Leisure: n=1,141; Business: n=725)

Likelihood of purchasing travel in the next 12 months



Next Leisure Destination

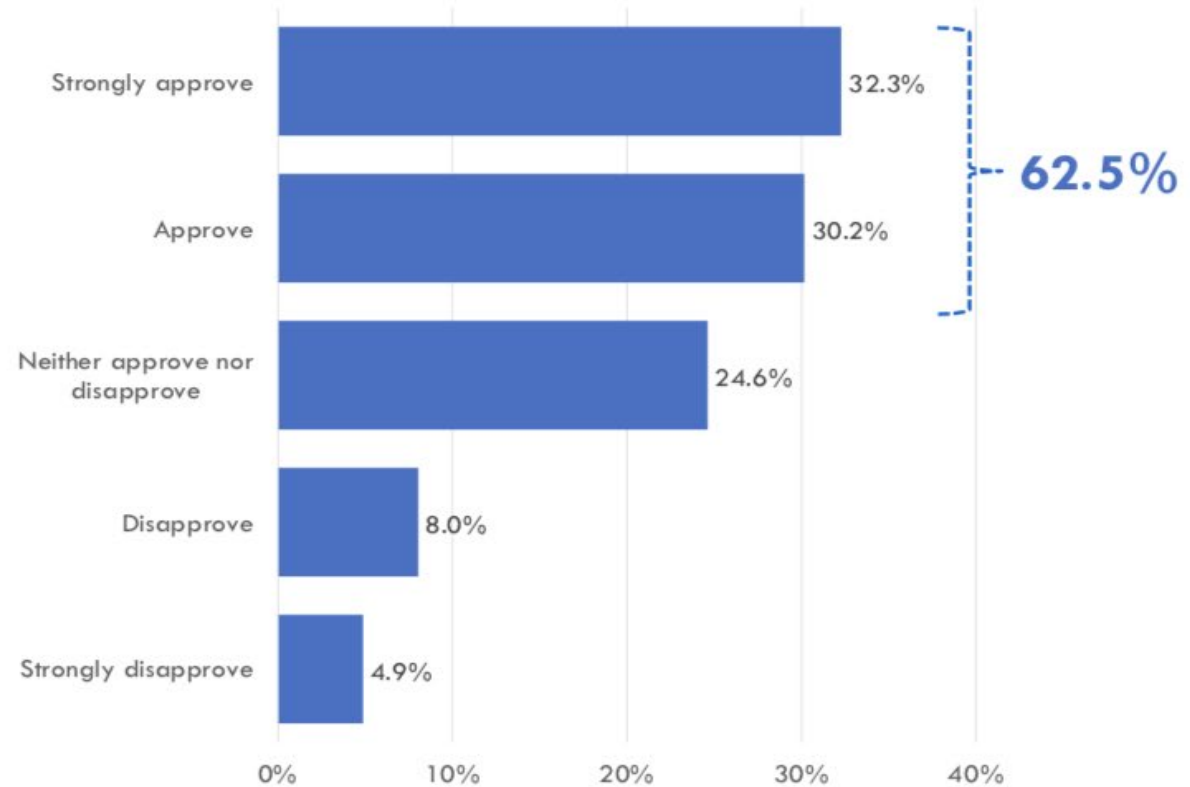


Perception of COVID-19 Pre-Test/14 Day Quarantine Requirement

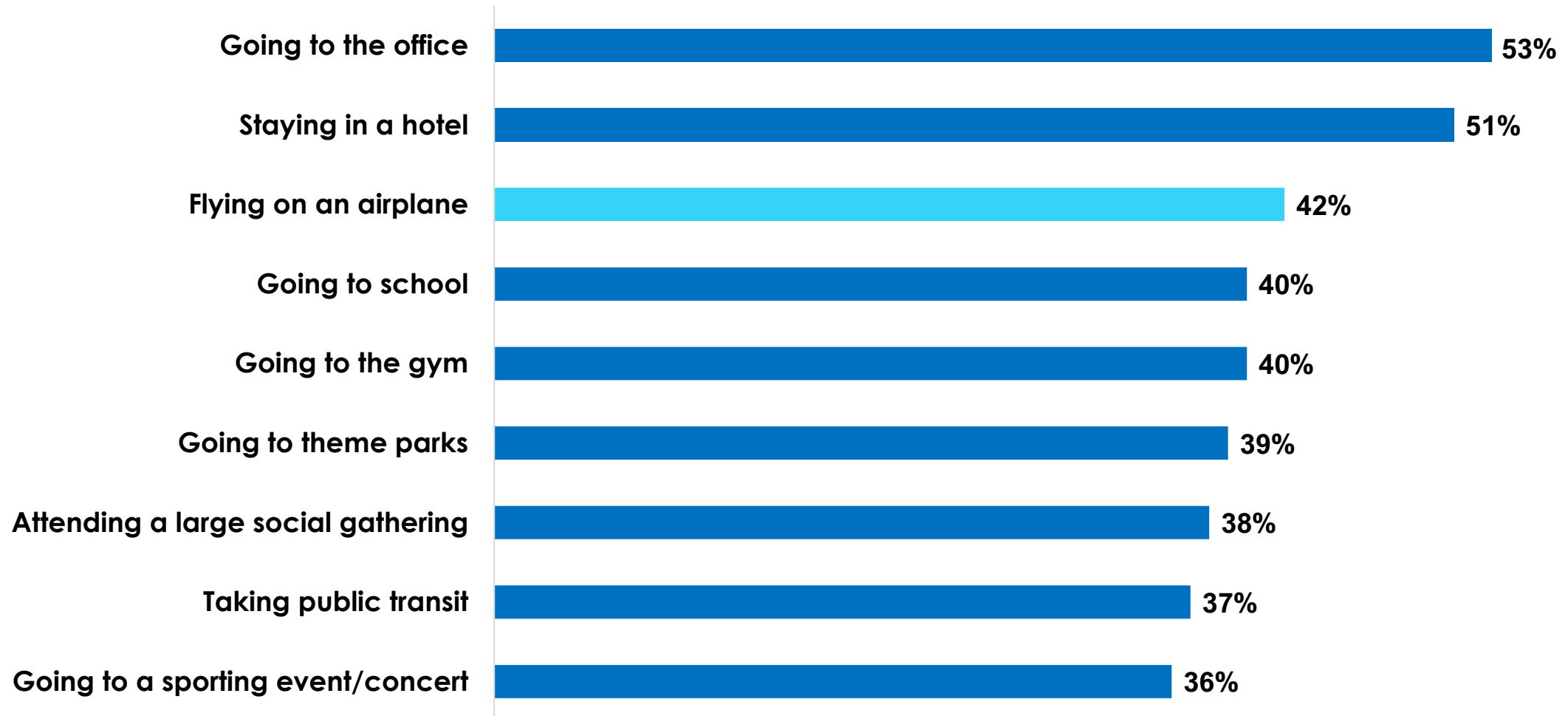
Question: Some U.S. States are requiring that travelers from high-risk states take action such as showing a negative COVID-19 test or opting to self-quarantine for 14 days.

Which best describes how you feel about these policies? (Select one)

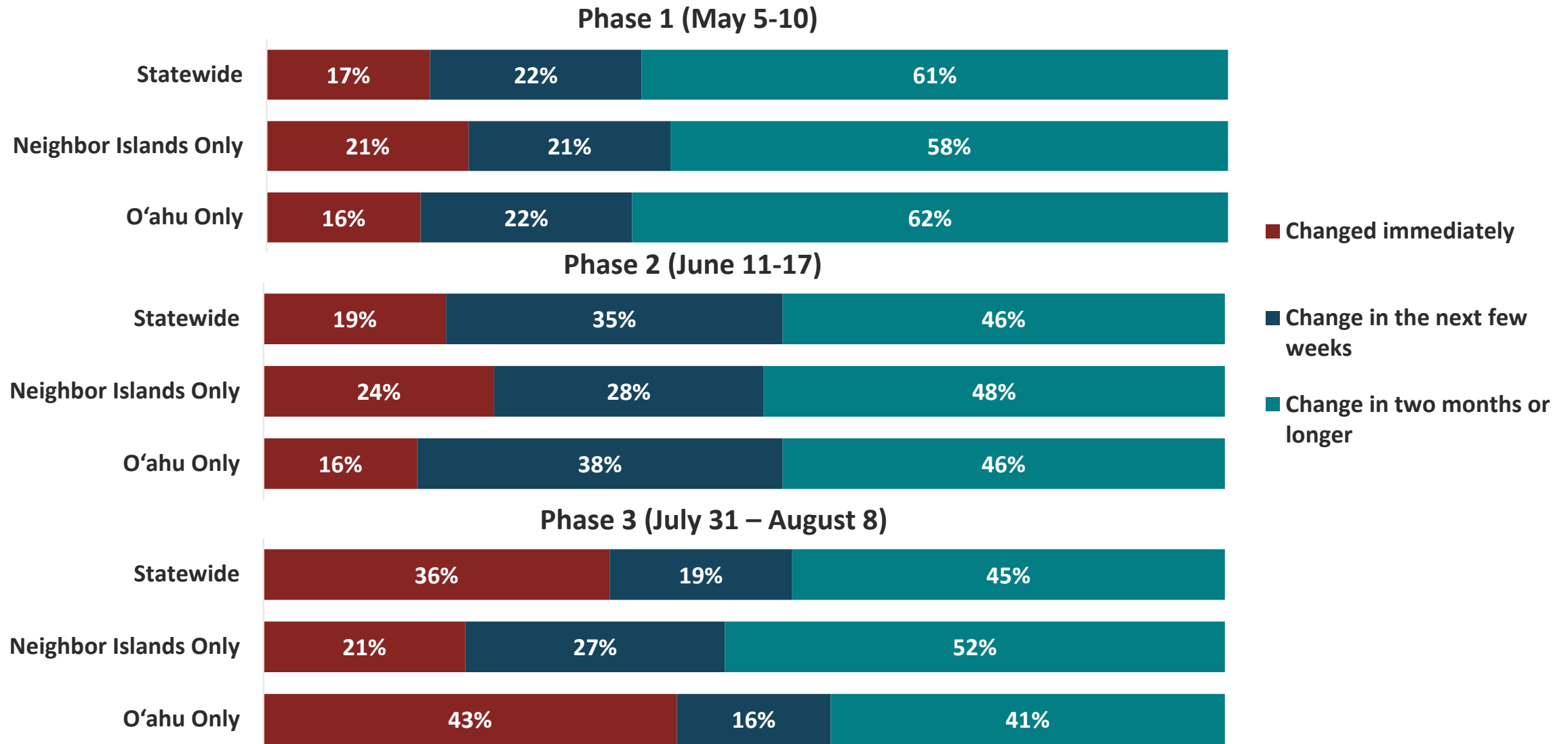
(Base: Wave 23 data. All respondents, 1,193 completed surveys. Data collected Aug 14-16, 2020)



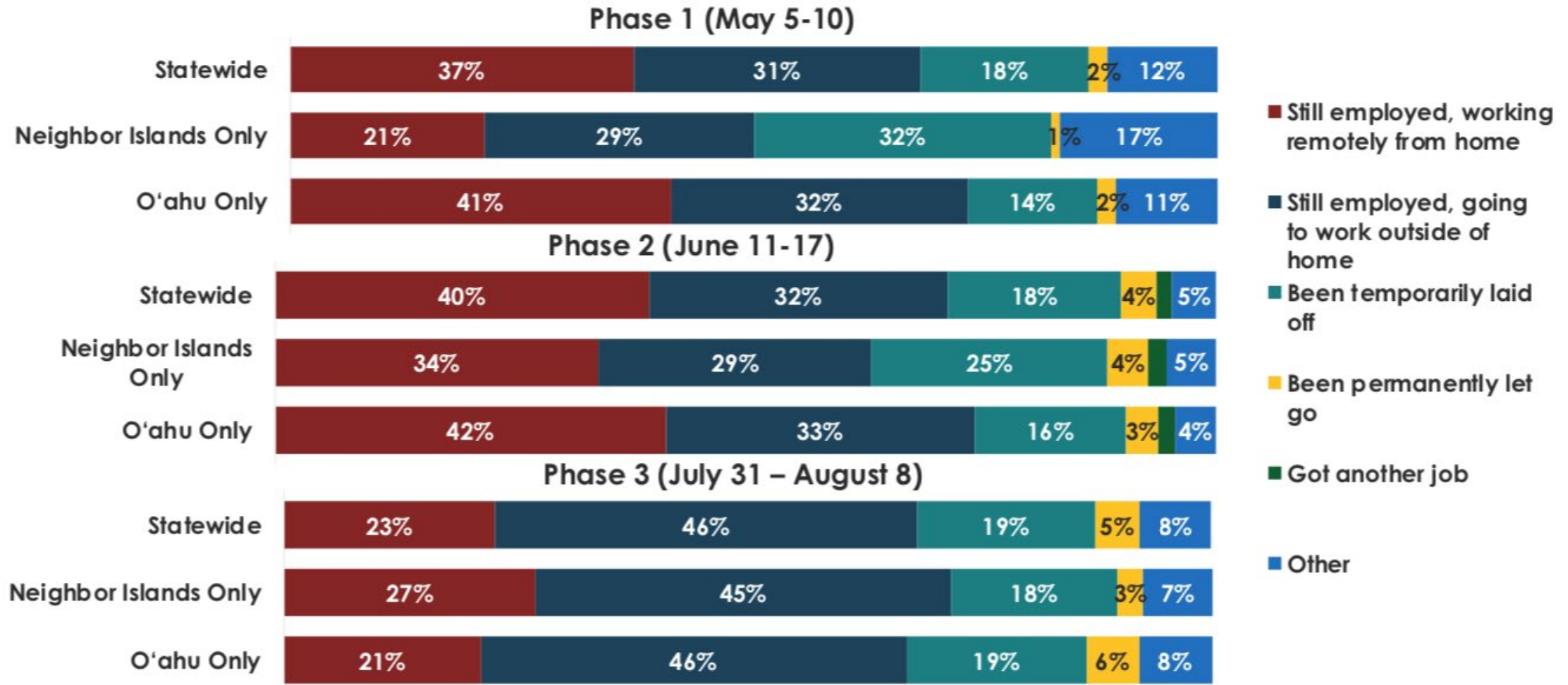
How comfortable would you be doing each of the following if you were able to get a rapid COVID-19 test beforehand?



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



Hawaii Residents – What is your employment situation now? (Of those working in February 2020)



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

It's Time

Communications Objective

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

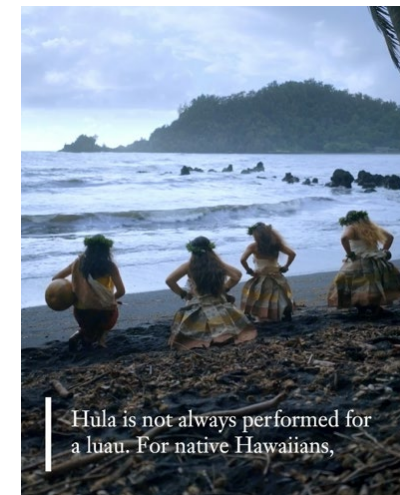
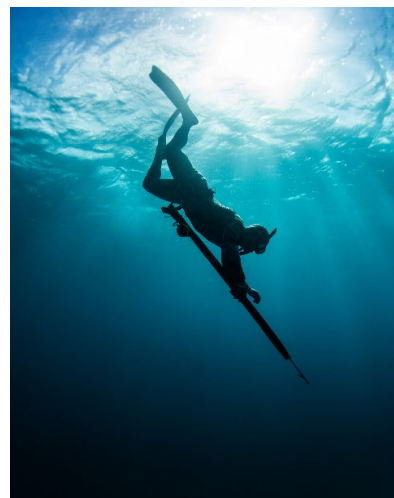
We'll let visitors know that it's not only time to come back to Hawai'i.

It's time to give back to Hawai'i.

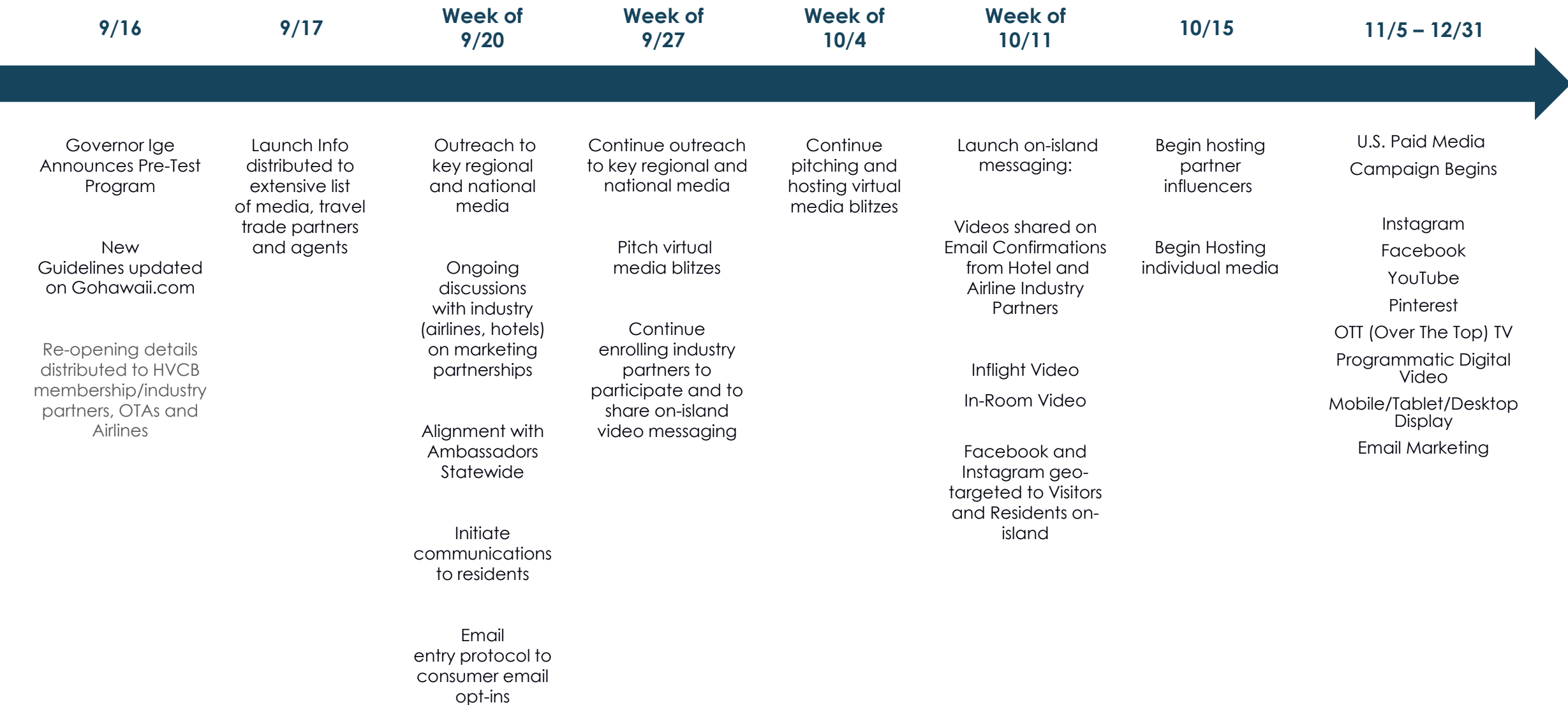


Communications Strategy

- Maintain Brand Integrity
- Share Destination Health & Safety Protocols
- Dial-Up Mindful Traveler Messaging
- Local Ambassadors sharing their values
- Deliver Messaging:
 - Pre-Arrival
 - Post-Arrival

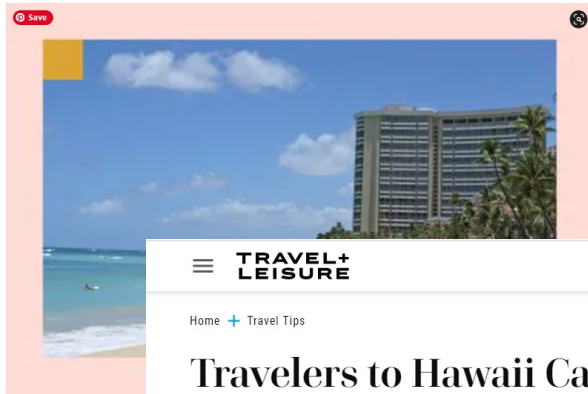


Re-Opening Communications Plan



Re-Opening Communications Plan - Initial Results

Hawaii will reopen to tourists Oct. 15 – with some conditions



Travelers to Hawaii Can Bypass Quarantine With a Negative COVID-19 Test Starting Oct. 15

The policy was originally supposed to be implemented on Aug. 1.

BY CAILEY RIZZO | SEPTEMBER 17, 2020

Save Pin FB More



TRAVEL NEWS

Hawaii to let travelers who test negative for COVID to bypass quarantine starting Oct. 15

David Oliver USA TODAY

Published 7:05 a.m. ET Sep. 17, 2020 | Updated 10:08 a.m. ET Sep. 17, 2020

Facebook Twitter Email

Hawaii Gov. David Ige said Wednesday that starting Oct. 15, travelers from out of state may bypass a 14-day quarantine for COVID-19.

Newsweek

NEWS

To Revive Ailing Tourism Economy, Hawaii Says Out-of-State Travelers Can Now Bypass 2-Week Quarantine

BY MILI GODIO ON 9/17/20 AT 4:00 PM EDT

Hawaii Governor David Ige announced on Wednesday that a pre-travel testing program will be implemented throughout the state starting October 15. It will allow out-of-state travelers to bypass the 14-day quarantine period if they show a negative COVID-19 test result upon arrival.

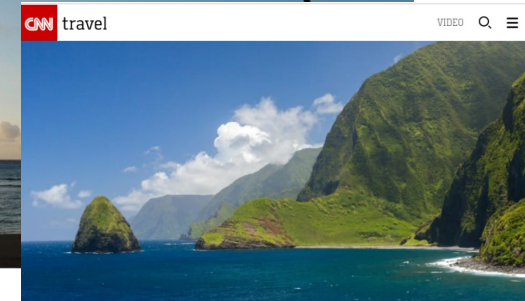
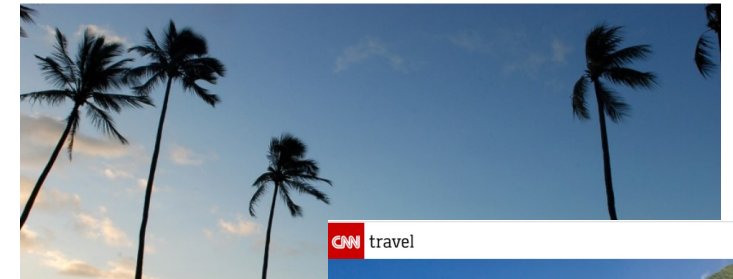


In this file photo from June 5, 2020, a surfer walks on a sparsely populated Waikiki Beach in Honolulu, Hawaii's governor... (Audrey McAvoy / The Associated Press) More

By AUDREY McAVOY The Associated Press

HONOLULU — Hawaii Gov. David Ige said Wednesday that starting Oct. 15, travelers arriving from out of state may bypass a 14-day quarantine requirement if they test negative for COVID-19.

Hawaii will allow pre-travel COVID testing instead of quarantining



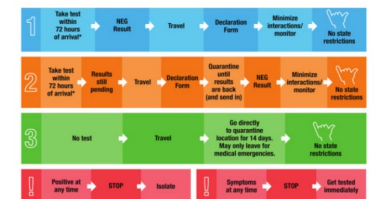
NEWS

Hawaii tentatively reopening to tourists October 15

By Brooke Fletcher, CNN • Published 17th September 2020 (CNN) — Here we go again. Again.

Since June, Hawaii has been going back and forth on its decision-making around allowing tourists to return without a mandatory 14-day quarantine. Having announced target dates for reopening three previous times.

According to a news release dated September 16, "Gov. David Ige today announced a new leadership team that will oversee the state's public health response to COVID-19 and the pre-travel testing program for Covid-19, which will start October 15."



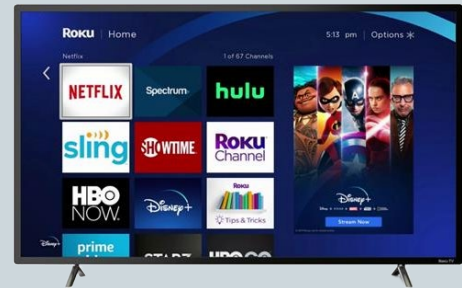
Re-opening Campaign Paid Media Launch



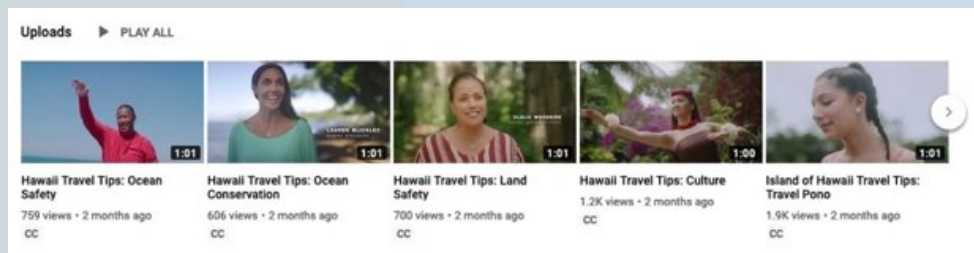
Social Media



OTT



Video



Digital Display

Los Angeles Times

LAist

LA WEEKLY

yahoo!

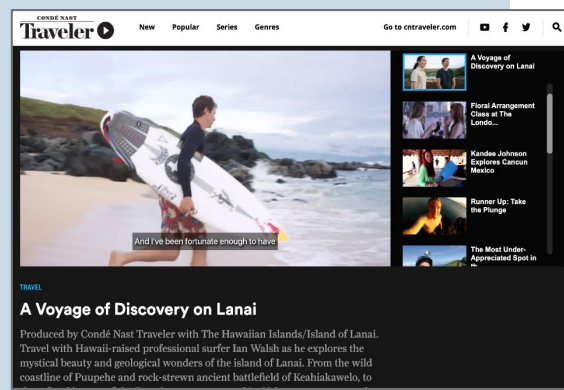
msn

SFGATE

VARIETY

The Seattle Times

Condé Nast Traveler



HAWAI'I IS BACK OPEN

PAST For months, we have closed our islands to outside visitors to keep our home and people safe.

PRESENT Now, it's time to reopen our home to visitors to help rebuild our economy, restore jobs and share *aloha* with the world. But we must do so thoughtfully. Our mission is to drive awareness of the reopening and ultimately get tourism numbers back up, but we have to reset our approach to accomplish this. It can no longer just be about reaching and inspiring Avid Travelers to go to Hawai'i.

FUTURE We need to guide visitors to experience Hawai'i on a deeper level with an invitation that places greater emphasis on connecting with the community and our culture, following safe health practices, giving back to the destination and helping to preserve it for the future.

It's more than where you go. It's **how you stay.**



MĀLAMA HAWAI'I

As tourism reopens this year, we're not just inviting travelers to Go Hawai'i.

We're welcoming them to stay in a new way.

To take the time to really know each island.

To form a deeper connection with our culture.

When they travel mindfully and Mālama Hawai'i, they'll have a more enriching experience and leave with a trip that truly stays with them.

MĀLAMA HAWAI‘I

Our content and messaging framework will serve as a mindful travel guide inspiring visitors to take care of Hawai‘i and themselves during their stay for a more enriching experience.

Mālama Hawai‘i means inviting visitors to:

Stay Open

From staying open to new experiences to enjoying wide open spaces, we’ll bring soft adventures to life – shining a light on social distancing-friendly environments.

Stay Connected

Embrace moments that help visitors stay present and connected – to each other and to themselves. With an emphasis on romance, rejuvenation, and wellness, we'll provide a sense of calm that we could all use right now.

Stay Mindful

By getting to know the local culture and community, travelers will walk away with a deeper understanding – and why it's so important to Mālama Hawai‘i

Stay Safe

Health and safety are top of mind as Hawai‘i reopens. So when we welcome visitors back, we'll also keep them informed – with all the ways they can exercise caution as they explore the islands.

Stay Involved

We’ll highlight all the ways visitors can give back during their visit. Everything from sustainable activities to voluntourism will be put in the spotlight, showing how they can make a positive impact on the Hawaiian Islands.

MĀLAMA HAWAI'I

The Hawai'i Tourism Authority, in partnership with a statewide alliance of private industry partners including hotels, airlines and volunteer organizations, are coming together with an initiative to encourage mindful and ultimately regenerative tourism by giving visitors an opportunity to stay an extra day at no charge if they participate in a voluntourism activity.

The Mālama Hawai'i program will help us maintain the beauty of Hawai'i for future generations and will provide visitors with a more meaningful and enriching travel experience.

MĀLAMA HAWAI'I

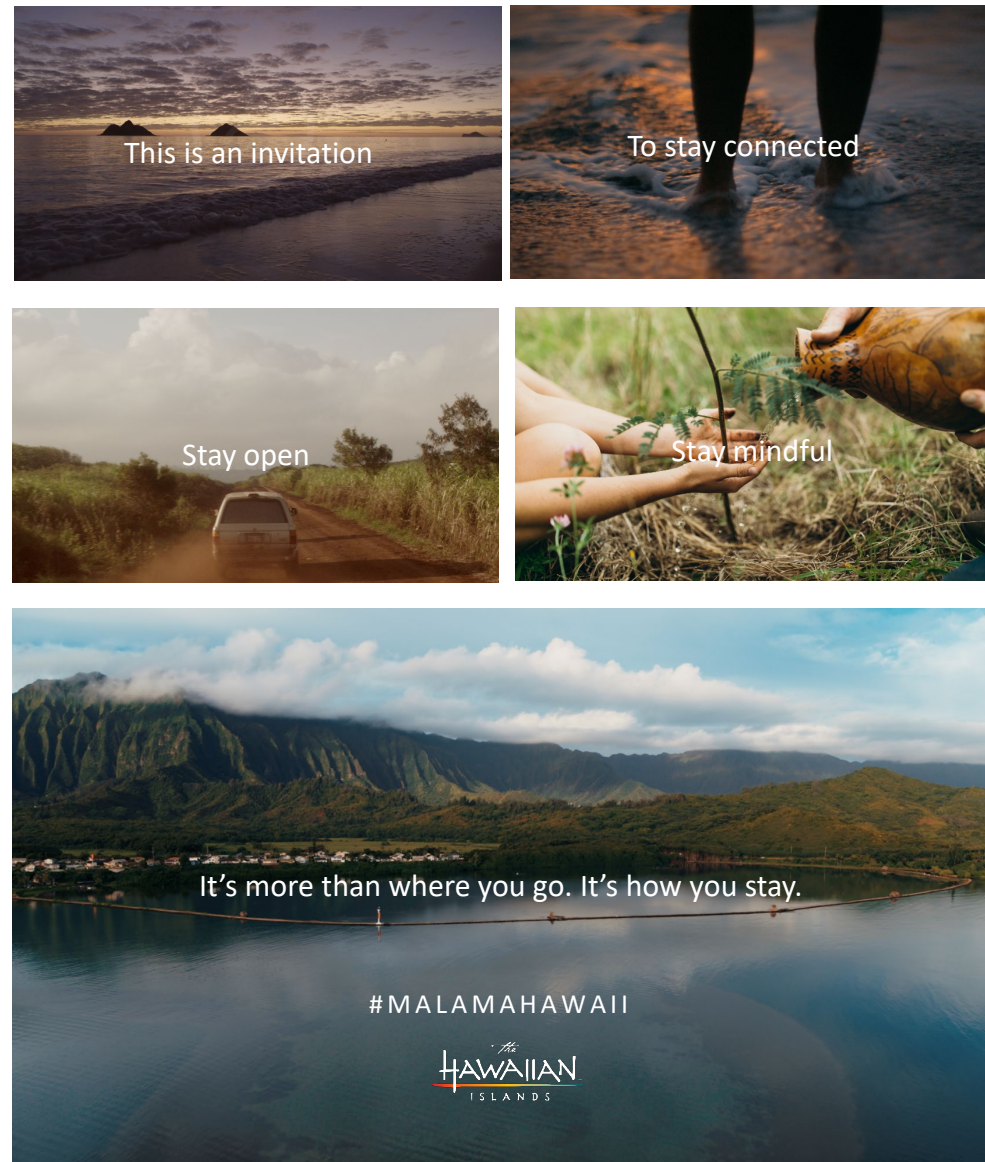
0:15 Social Video Ad

Sample script:

This is an invitation
Not just to stay here
This is an invitation
To stay connected
Stay open
Stay mindful
It's more than where you go
It's how you stay
Mālama Hawai'i

Social Post Copy:

As Hawai'i reopens, we welcome you with an open heart, and with an invitation – to Mālama Hawai'i. To put it simply, Mālama means to take care - of our earth, ourselves and each other. And by doing so, you'll experience a deeper connection and a stay that really stays with you.



Sample frames from script

MĀLAMA HAWAI‘I

Ambassador Invitations

Building on our reopening efforts, we'll create a series of invitations from ambassadors speaking to their own personal connection with *mālama*, and welcoming visitors to Mālama Hawai‘i when they visit.



PROGRAMMING

MĀLAMA HAWAI‘I OFFER

As hotels around the state reopen their doors, let’s come together as one *‘ohana* and give our guests the opportunity to stay a free night if they engage in a volunteer project to help regenerate the natural beauty and culture of Hawai‘i.



SAFE TRAVELS ISLANDS EXPERIENCES CULTURE PLANNING LANGUAGES

Giving Back on Vacation

Malama Loko Ea Foundation

Explore more about the Hololea Visitor Tour Program today!

Maui Nui Botanical Gardens

Learn more about Voluntourism opportunities.

Pohaha I Ka Lani

Find out more about Pohaha Ka Lani vacation volunteer programs!

Pacific Whale Foundation

Learn more about the Volunteers on Vacation program!

Sustainable Coastlines Hawaii

Learn More about Sustainable Coastline's Clean-up events!

Hawaii Forest Institute

Contact them at 808-933-9411 to find out about upcoming volunteer events!

KEY CHANNELS

How We'll Promote The Program

Hawai'i Visitors & Convention Bureau

- National & local media outreach
- Social media & email
- Paid media in LA, SF, PDX, SEA
- Spotlight on GoHawaii.com

Industry Partners

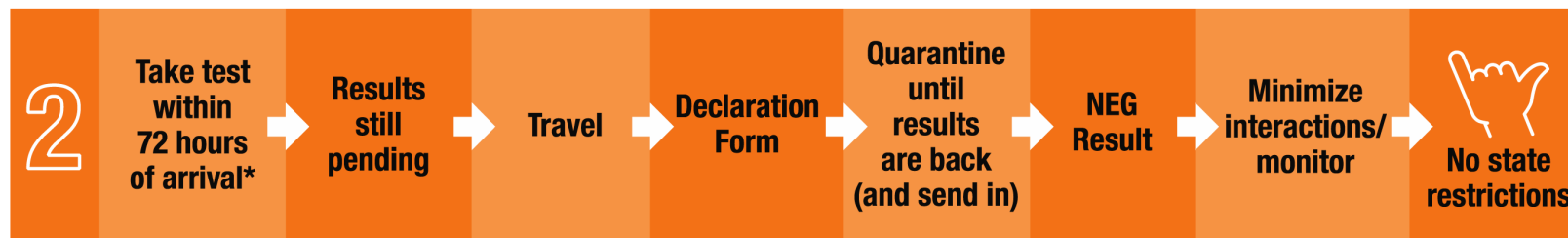
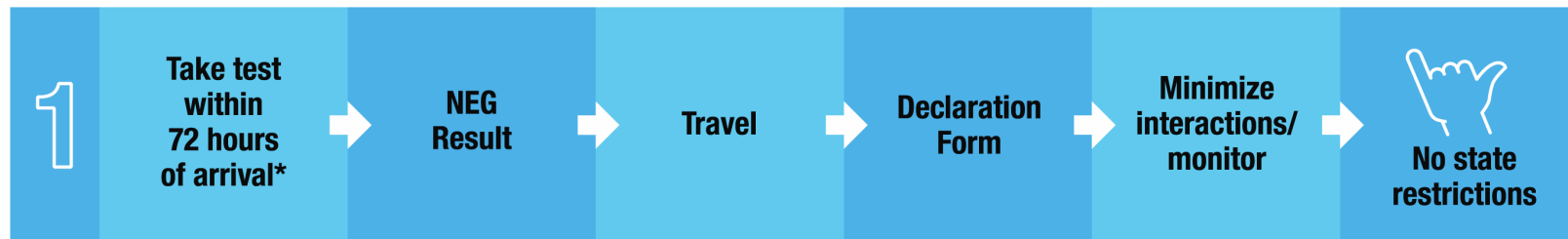
- Social media & email
- Influencer visits
- Direct sales calls
- Package development
- Participation in press release and media outreach



FLYING INTO HAWAI'I?



Take a pre-travel test or quarantine for 14 days. Here are the steps:



*Any approved Nucleic Acid Amplification Test performed at a CLIA certified lab