



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

**REGULAR MARKETING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY**

Po'akolu, 16 Kēkēmapa 2020, 10:30 a.m.
Wednesday, December 16, 2020 at 10:30 a.m.

Hālāwai Kikoho'e
VIRTUAL MEETING

Hiki i ka lehulehu ke hālāwai pū ma o ka ZOOM.
Webinar will be live streaming via ZOOM.

Register in advance for this webinar:

https://zoom.us/webinar/register/WN_U7H9TtjrT8auahgLHEX3LA

After registering, you will receive a confirmation email
containing information about joining the webinar.

Papa Kumumana'o – Ho'ololi 'Ia
AMENDED AGENDA

1. *Ho'omaka A Pule*
Call to Order and Pule
2. *Āpono I Ka Mo'o'ōlelo Hālāwai*
Approval of Minutes of the November 18, 2020 HTA Marketing Standing Committee Meeting
3. *Hō'ike A Costeo Travel*
~~Presentation of Costeo Travel market trends, demands for Hawaii'i and by Islands.~~
Presented by Jolene Schuerman, Hawaii'i Buyer
4. *Hō'ike A Āpono I Ka Ho'olako I Ka Papahana Ka'a'ike Kāko'o 'Oihana Li'ili'i*
~~Presentation and approval for funding a communication plan for guests to frequent and support small businesses. Presentation by Sherry Menor-McNamara, Chamber of Commerce of Hawaii'i, President & CEO~~



5. ***Hō'ike, Kūkākūkā A 'Āpono I Ka Mo'ohelu Hokona Makahiki Kālā 2021***
Presentation, discussion and approval of the revised Fiscal Year 2021 Branding budget to be included in the proposed Fiscal Year 2021 revised overall budget for the Hawai'i Tourism Authority. The presentation will include a review of the amended budget line items specifically related to the Branding section of the authority's previously approved budget

6. *Hō'ike A Kūkākūkā No Ka Ho'opa'a Huaka'i A Nā 'Ākena*
Presentation and discussion of the travel agents booking pace and general market research trends

7. ~~*Hō'ike A Kūkākūkā No Ka Mākeke 'Amelika*~~
~~Presentation and discussion of the general US market updates and trends of which could include the leisure and group segments~~
Hō'ike A HVCB
Presentation by the Hawai'i Visitors and Convention Bureau that will include market insights, an update on the Mālama Hawai'i program, and discussion on calendar year 2021 as it relates to certain assumptions and approaches including information pertaining to the PGA Tour's messaging

8. *Hō'ike A Kūkākūkā No Ka Mākeke Iāpana*
Presentation and discussion of the general Japanese market updates and trends of which could include the leisure and group segments

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.



HAWAII TOURISM AUTHORITY

Hawai'i Convention Center
1801 Kalākaua Avenue, Honolulu, Hawai'i 96815
kelepona tel 808 973 2255
kelepa'i fax 808 973 2253
kahua pa'a web hawaii-tourismauthority.org

David Y. Ige
Governor

John De Fries
President and Chief Executive Officer

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
November 18, 2020

HTA Marketing Standing Committee Meeting



**MARKETING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY
Wednesday, November 18, 2020
Virtual Meeting**

MINUTES OF MARKETING STANDING COMMITTEE MEETING

COMMITTEE MEMBERS PRESENT:	Kelly Sanders (Chair), Fred Atkins, George Kam, Kyoko Kimura, and Sherry Menor-McNamara
COMMITTEE MEMBER ABSENT:	Benjamin Rafter
HTA STAFF PRESENT:	John De Fries, Keith Regan, Pattie Herman, Marc Togashi, Marisa Yamane, Kalani Ka'anā'anā, Caroline Anderson, and Jennifer Chun
GUESTS:	Irene Lee, Susan Webb, Molly Jou, John Reyes, and John Monahan
LEGAL COUNSEL:	Gregg Kinkley

1. Call to Order:

Chair Kelly Sanders called the meeting to order at 10:33 a.m. Keith Regan, HTA Chief Administrative Officer, provided instructions to the general public with regard to submitting testimony. Mr. Regan confirmed the attendance of the Committee members by roll call. Mr. Regan turned the floor over to Chair Sanders.

2. Approval of Minutes of the October 28, 2020 HTA Marketing Standing Committee Meeting:

Chair Sanders requested a motion to approve the minutes of the October 28, 2020 HTA Marketing Standing Committee meeting. George Kam made a motion, which was seconded by Fred Atkins. The motion was unanimously approved.

3. Update on Trusted Travel Partners for Korea, Canada and Taiwan Presentation by the Respective GMTs:

Chair Sanders recognized Irene Lee of Hawai'i Tourism Korea (HTK) to provide an update on trusted travel partners in the Korea market. Ms. Lee reported that Korea does not have an approved travel pre-testing program yet. She said that COVID-19 tests are approved by the Korea Ministry of Health and Welfare and then testing processes are managed and



operated by the Korea Disease Control and Prevention Agency. She explained that Korean nationals returning from the United States must quarantine for 14 days and download a contact tracing mobile app that is heavily monitored by the government. Returning travelers also require a negative COVID-19 test within 72 hours of their arrival. Ms. Lee noted that there are six hundred screening centers nationwide, and one hundred centers provide test certificates in English. She said that Incheon Airport is setting up a rapid testing center for outbound travelers to be tested before their departure in Terminal 2, which houses Korean Air and other SkyTeam Alliance carriers including Delta Airlines. She added that the rapid testing should be in operation from mid-December. Ms. Lee said that selecting and coordinating trusted travel partners with the Attorney General's office (AGO) remains a priority. She added that Hawaiian Airlines will resume direct flights on November 27th.

Chair Sanders recognized Susan Webb of Hawai'i Tourism Canada (HTC) to provide an update on trusted travel partners in the Canada market. Ms. Webb reported that by the end of the week, an announcement will be made regarding approved trusted travel partners in Canada and the resumption of direct flights on Air Canada and WestJet in early December. She said that one of the deterrents for Canadians traveling to Hawai'i had been the mandatory 14 day quarantine upon their return to Canada. However, now, if a returning traveler has a negative result for a rapid COVID-19 test upon arrival at the airport and another negative test result five days later, then the 14-day quarantine is no longer required. Ms. Webb noted that a maximum 5 day quarantine makes a significant difference for Canadians who want to travel to Hawai'i. She said that the inbound arrival testing is offered at Toronto and Calgary airports. She reported that the Vancouver airport is still piloting rapid pre-flight testing for COVID-19-free flights.

Chairs Sanders recognized Molly Jou of Hawai'i Tourism Taiwan (HTT) to provide an update on trusted travel partners in the Taiwan market. Ms. Jou reported that the COVID-19 situation is under control. She noted that China Airlines has no timeline to resume direct flights from Taipei to Honolulu. She explained that border restrictions must be lifted and COVID-19 protocol in place to waive quarantine requirements. Ms. Jou said that three private hospital chains have been identified as trusted travel partners, and the three chains intend to sign a memorandum of understanding with the AGO. She added that HTT will continue to support and facilitate the approval of a trusted travel partner program in Taiwan. Ms. Jou reported that HTT will host a Taiwanese virtual trade show on December 10th, which will be supported by Hawaiian Airlines and United Airlines.

Mr. Atkins asked if there has been a spike of COVID-19 cases in Korea. Ms. Lee responded that there have been small, localized spikes in cases. However, the daily number of confirmed cases remain between one and two hundred nationwide.



Chair Sanders invited the public to provide testimony, and there was a question. Duke Ah Moo asked about the cost of a COVID-19 test in Korea. Ms. Lee responded that the cost of polymerase chain reaction (PCR) test in Korea is \$100, but is free if a person is symptomatic or has come into contact with someone who has tested positive.

4. Update on Travel Agent Booking Pace by Jennifer Chun, HTA's Director of Tourism Research:

Chair Sanders recognized Jennifer Chun, HTA Director of Tourism Research, to present on travel agent booking pace. Ms. Chun noted that the data she receives is from Global Agency Pro, which collects 90% of the world's travel agency booking data. She reported that there were more bookings than last month's meeting, but is still a great deal lower compared to 2019. Ms. Chun noted that there were a few visitors from Canada, Australia, and New Zealand likely coming through domestic flights because airlines are not yet flying directly to Hawai'i from those destinations. She said that half of the bookings are from the U.S. to O'ahu. Ms. Chun said that bookings from Japan continue to be low because of the limited number of flights. She added that the mandatory 14 day quarantine remains an issue and will continue to impact bookings from Japan.

Ms. Chun reported that the booking pace in 2021 continues to be relatively low. She noted that there are a fair number of U.S. visitors planning trips to Maui, but very few people traveling to Moloka'i and Lāna'i. She added that booking pace for Hawai'i Island and Kaua'i remains slow, and the travelers on the books are mostly U.S. visitors. Ms. Chun said that the booking pace reports will continue to be published weekly.

Chair Sanders invited the public to provide testimony, and there was a question. Patrick Blangy asked where the majority of U.S. travelers are traveling from. Ms. Chun responded that the majority come from the U.S. West.

5. Update on Group General Trends, Cancellations and Booking Pace by John Reyes, HVCB Senior Vice President, Chief MCI Sales Officer:

Chair Sanders recognized John Reyes of HVCB to provide an update on group trends, cancellations, and booking pace. Mr. Reyes reported that things were going well from January through March. He said that from April, they were working in a different landscape and operating at a 40% budget. He noted that difficult decisions with staff reductions were made. Mr. Reyes said that he currently has three Meet Hawai'i sellers for the U.S. market, one sales coordinator, and one staff member for the 'Elele Program. He noted that he would like to rebuild a dedicated citywide sales staff.



John Monahan of HVCB said that they had to prioritize which business would return first, which would be leisure travel due to issues and complications with gatherings. He noted that they stripped their staff down to the foundations, but that they would like to start rebuilding their sales staff. He added that HVCB is looking to hire a quarterback for citywide business, and they are actively in the process of doing so.

Mr. Reyes said that the goal is to remain nimble and to adjust to the COVID-19 situation as it evolves. He explained that the sales team is actively reviewing their business accounts and targeting specific accounts for single property and citywide business. He noted that their focus is on 2023 and 2026 for citywide business. Mr. Reyes said that the sales strategy is based on time efficiency. He explained that if a customer is not generating business, then time should not be spent on that account.

Mr. Reyes said that HVCB in partnership with HTA is launching the new Mālama Hawai'i initiative, which is focused on attracting mindful and responsible MCI groups and travelers. He noted that they are introducing corporate-social responsibility programs to customers and sharing how they can be involved.

Mr. Reyes said that HVCB was ready to launch a new citywide strategy in January, but the pandemic and budgetary restrictions put that plan on hold. He noted that every major citywide destination is now focused on rebooking canceled events. He added that the virtual Hawai'i Ford trade show on October 15th was successful with over 120 people in attendance.

Mr. Reyes said that HVCB has transitioned to long-term pace reporting because it is more accurate and better aligned with other industry reporting. He noted that 2020 pace at the Hawai'i Convention Center (HCC) is down 93% and combined room nights are down 58%. He said that MCI business whether single property or citywide should generate 375,000 room nights every year. Mr. Reyes noted that pace for 2021 and 2022 is looking good. However, pace for 2023 and 2026 is lagging behind, and that he and his staff are trying to develop more business for those years. He said that the first priority would be to hire a citywide salesperson with a focus on corporate business. He reported that fourteen groups canceled in 2020, and two groups canceled in 2021, which results in over \$340 million of negative economic impact. Mr. Reyes explained that they need to rebid for canceled groups. If groups rebook, then that means there is no competition to retain the business.

Mr. Reyes said that some of the new MCI trends are smaller groups with ten to fifty sleeping rooms and a hybrid combination of remote and in-person events. He noted that he does not expect business to begin normalizing until the latter part of 2021 and if a vaccine is widely available.



Chair Sanders asked if the positive level of pace in 2022 is a result of group postponement from 2021. Mr. Reyes agreed and noted that a lot of 2021 business is rebooking in 2022.

Mr. Atkins asked how many sales people were on staff in January. Mr. Reyes responded nine in total between HVCB and HCC. He added that he would love to have three sales people. He said that the first priority would be a corporate citywide seller followed by a major association seller. Mr. Monahan replied that HVCB is active in the market. He noted that they reduced their sales staff down to the foundation due to meeting business being at a standstill. He said that they have identified key people to add to their sales staff.

6. Adjournment:

The meeting adjourned at 11:35 a.m.

Respectfully submitted,

Reyn S.P. Ono

Reyn S.P. Ono
Recorder

Agenda Item #5:

Presentation, discussion and approval of the revised Fiscal Year 2021 Branding budget to be included in the proposed Fiscal Year 2021 revised overall budget for the Hawai'i Tourism Authority

Hawaii Tourism Authority
 Amended Budget (December 16, 2020 Marketing Standing Committee Meeting)
 FY 2021

Program Code	Program Title	FY 2020 Budget (Adopted)	FY 2021 Budget (Adopted)	FY 2021 Proposed Amended Budget	Variance
Branding					
004	Cruise Infrastructure Improvements and Arrival Experience	250,000	50,000	50,000	-
102	Hawai'i Tourism Summit	300,000	-	-	-
306	Island-Based International Marketing	800,000	-	-	-
316	MICE Asia (formerly MCI Global - Management)	350,000	-	-	-
318	gohawaii.com (formerly Online Website Coordination)	350,000	300,000	300,000	-
320	Island Chapters Staffing and Admin	3,170,000	2,400,000	2,400,000	-
321	US (formerly North America)	22,525,000	17,685,707	17,000,000	(685,707)
322	Canada	800,000	373,820	400,000	26,180
323	Japan	10,000,000	5,000,000	4,500,000	(500,000)
324	Korea	1,400,000	400,000	300,000	(100,000)
325	Oceania	1,900,000	500,000	400,000	(100,000)
326	Europe	400,000	-	-	-
329	China	2,000,000	-	-	-
330	Taiwan	500,000	-	-	-
331	Meetings, Convention & Incentives (Global - Conv. Ctr and Single Prop.)	2,300,000	-	-	-
336	Southeast Asia	500,000	-	-	-
339	Global Digital Marketing Strategy (former Intl Online Strat)	500,000	380,500	380,500	-
350	Global Mkt Shared Resces (formerly Intellect Prop Data Bank)	797,000	787,000	787,000	-
380	Marketing Opportunity Fund	2,000,000	-	-	-
397	Memberships and Dues - Branding (US Travel Membership)	100,000	125,000	125,000	-
398	Travel - Branding	50,000	50,000	10,000	(40,000)
723	Hawaii Film Office Partnership	30,000	30,000	30,000	-
934	State Employee Salaries - Branding	539,050	508,648	535,011	26,363
Subtotal	Branding	51,561,050	28,590,675	27,217,511	

Agenda Item #6:

Presentation and discussion on the
travel agent booking pace and
general market research trends

TRAVEL AGENCY BOOKING TRENDS

DECEMBER 7, 2020

HAWAII TOURISM

AUTHORITY

Global Agency Pro

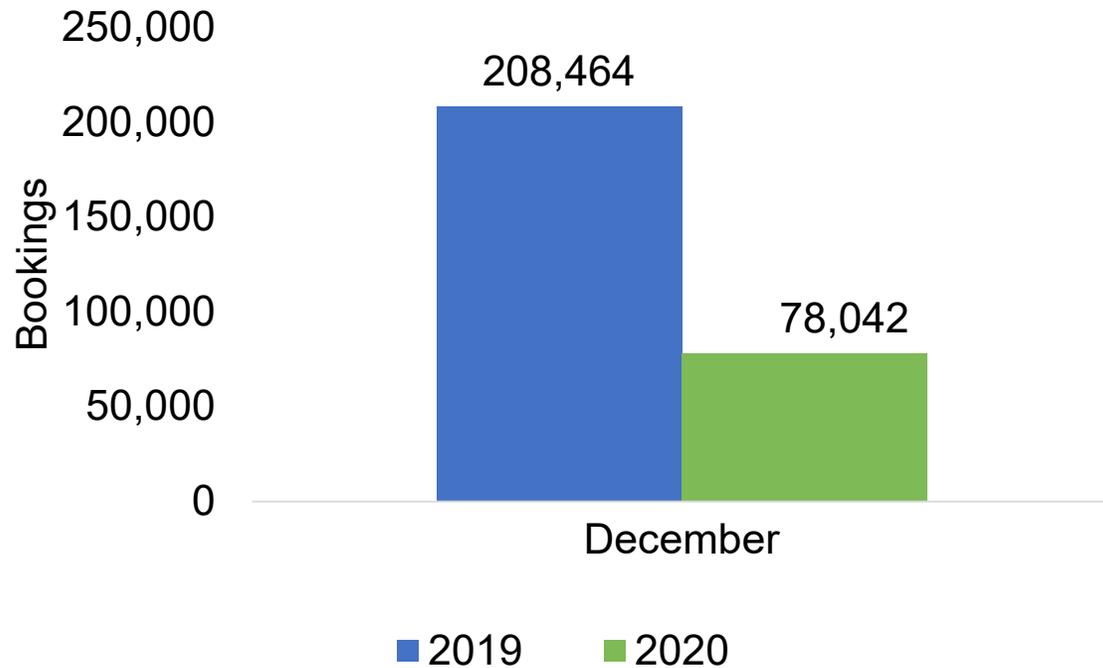
- HTA subscribes to Global Agency Pro, an online travel distribution system consisting of Travel Agency data
- Global Agency Pro provides access to over 90% of the world's Travel Agency airline transactions
- The database consists of five years of historical ticketing data and one year of advance purchase data
- The information is updated daily with a recency of two days prior to current date

Global Agency Pro Index

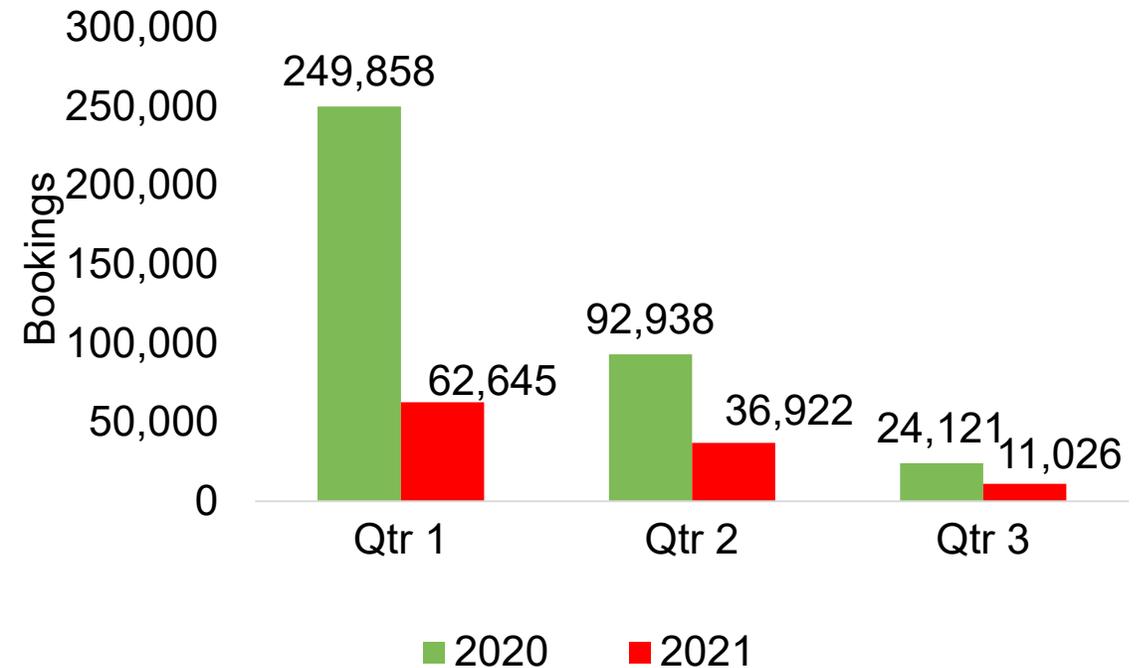
- **Bookings**
 - Net sum of the number of visitors (i.e., excluding Hawai'i residents and inter-island travelers) from Sales transactions counted, including Exchanges and Refunds.
 - Booking Date
 - The date on which the ticket was purchased by the passenger. Also known as the Sales Date
- **Travel Date**
 - The date on which travel is expected to take place.
- **Point of Origin Country**
 - The country which contains the airport at which the ticket started
- **Travel Agency**
 - Travel Agency associated with the ticket is doing business (DBA)

US

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 by Month



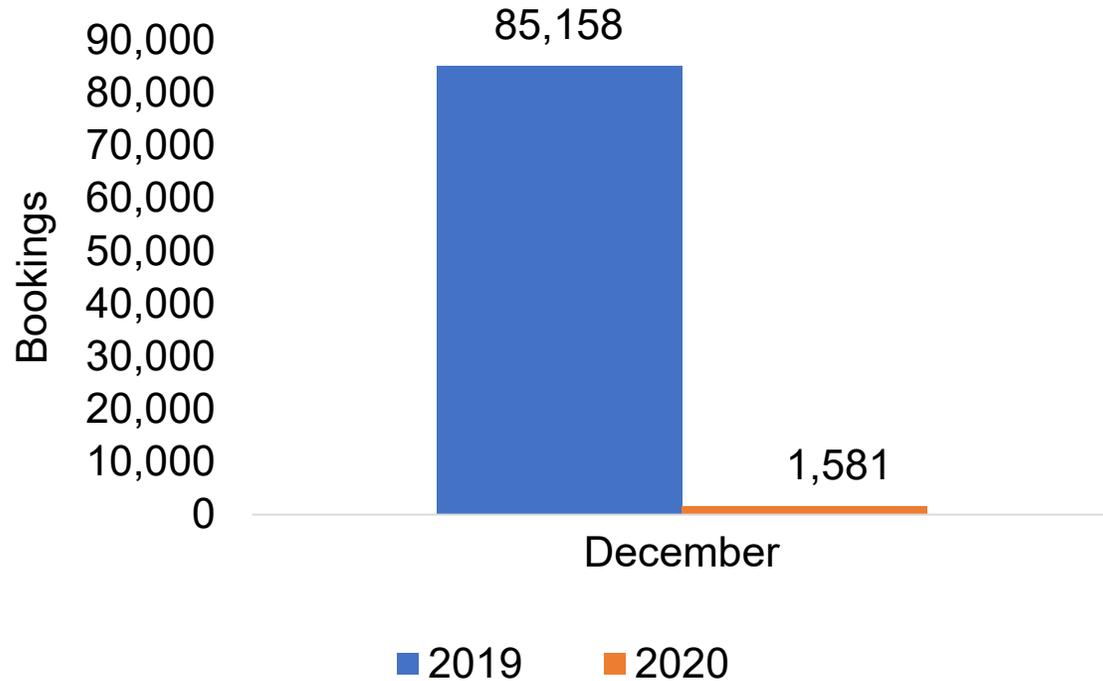
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 by Quarter



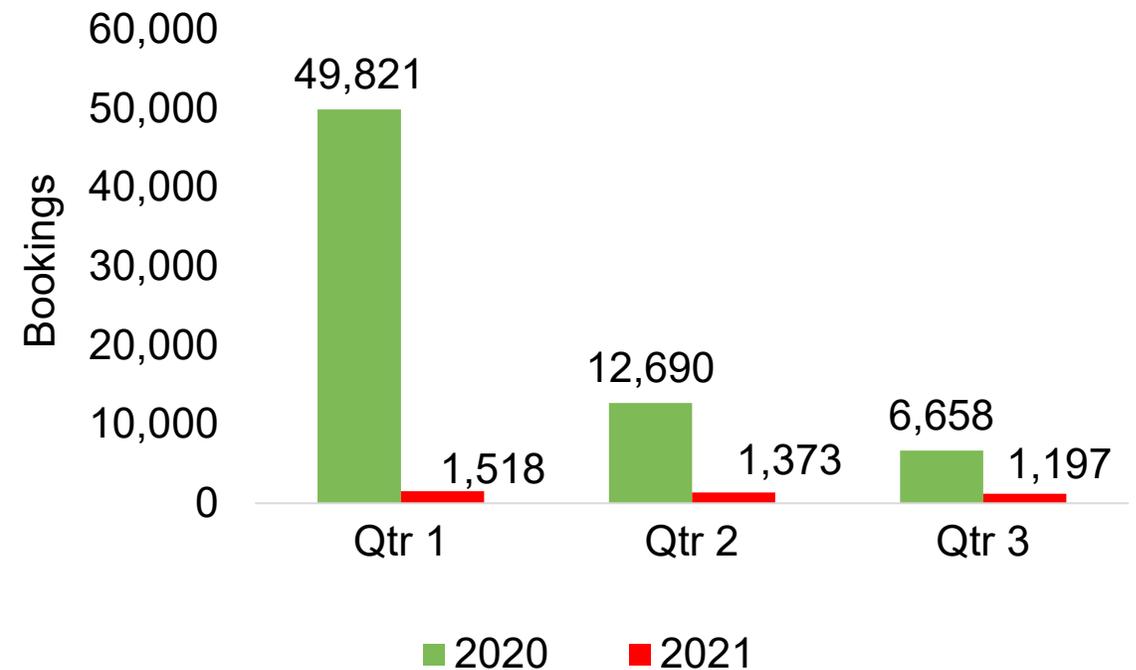
Source: Global Agency Pro as of 12/05/20

JAPAN

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 by Month



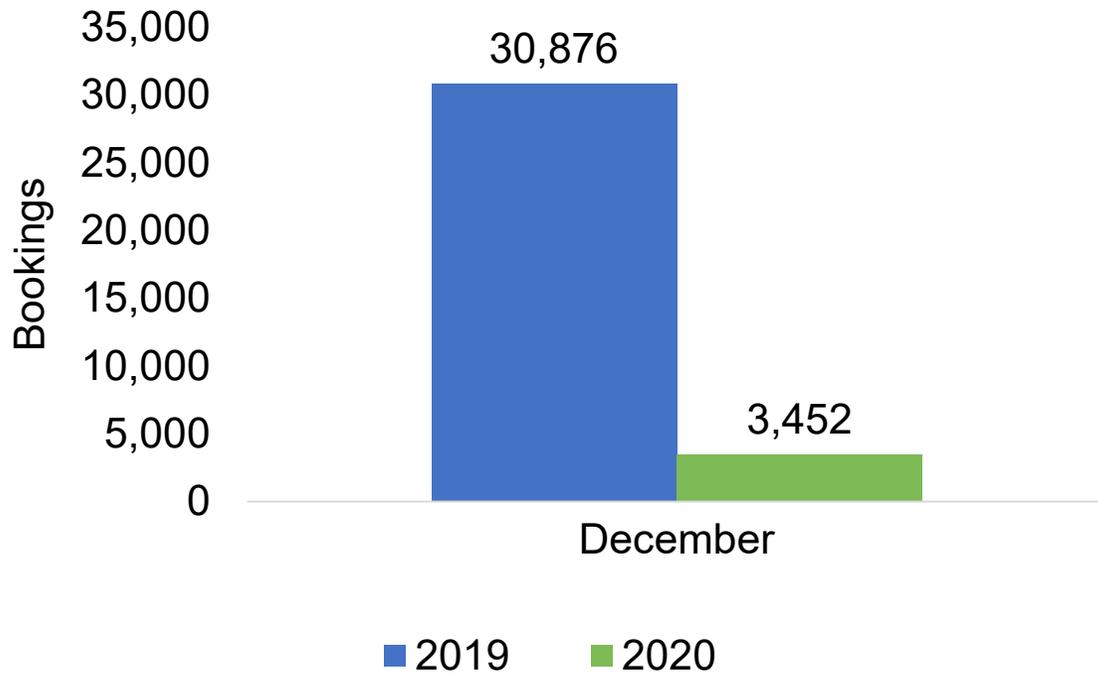
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 by Quarter



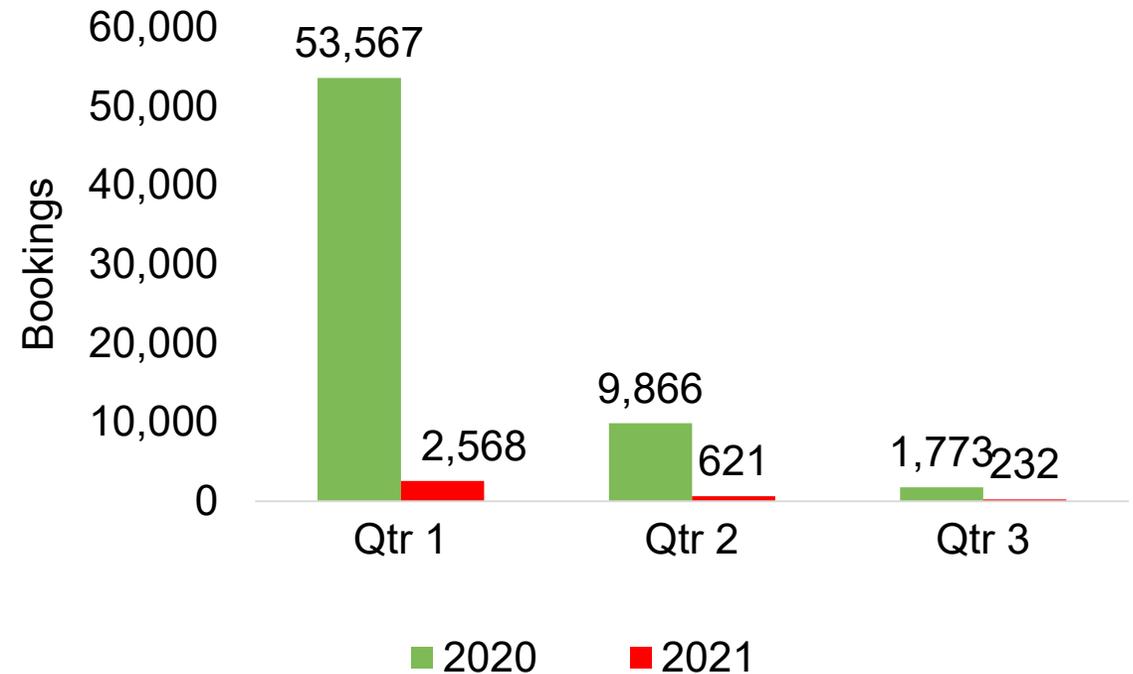
Source: Global Agency Pro as of 12/05/20

CANADA

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 by Month



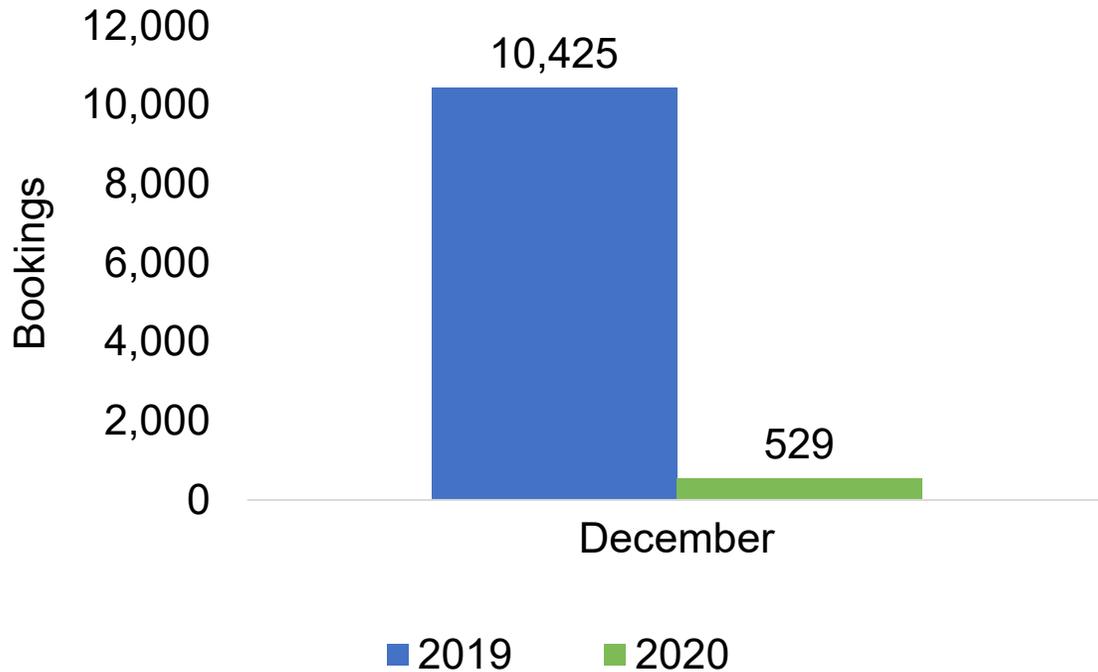
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 by Quarter



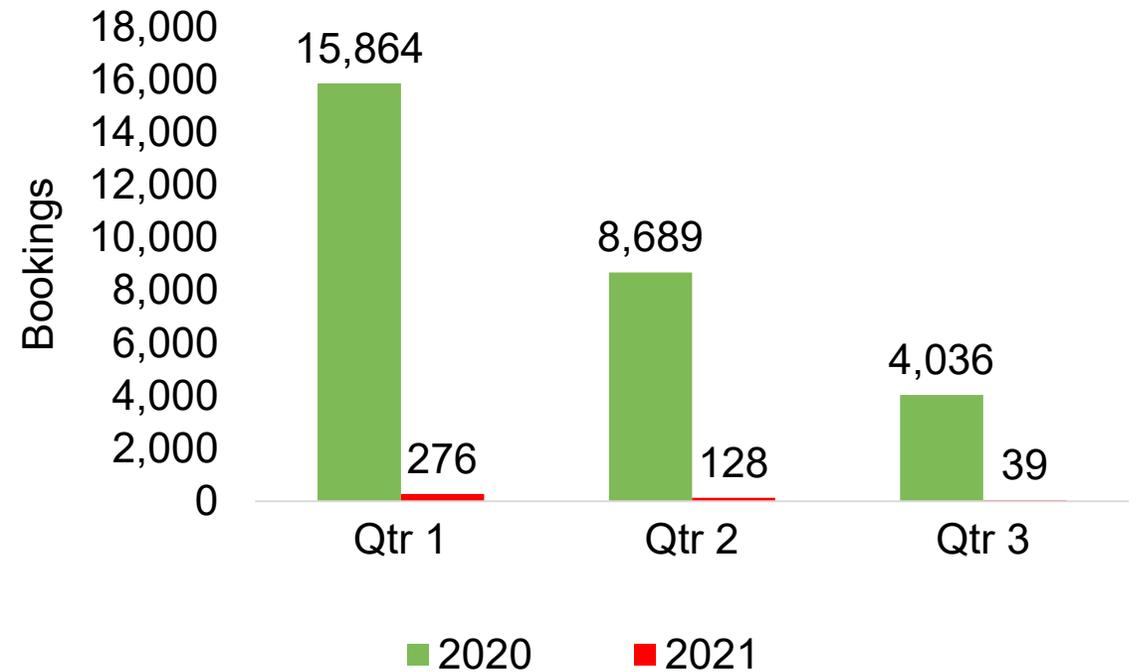
Source: Global Agency Pro as of 12/05/20

AUSTRALIA

Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 by Month



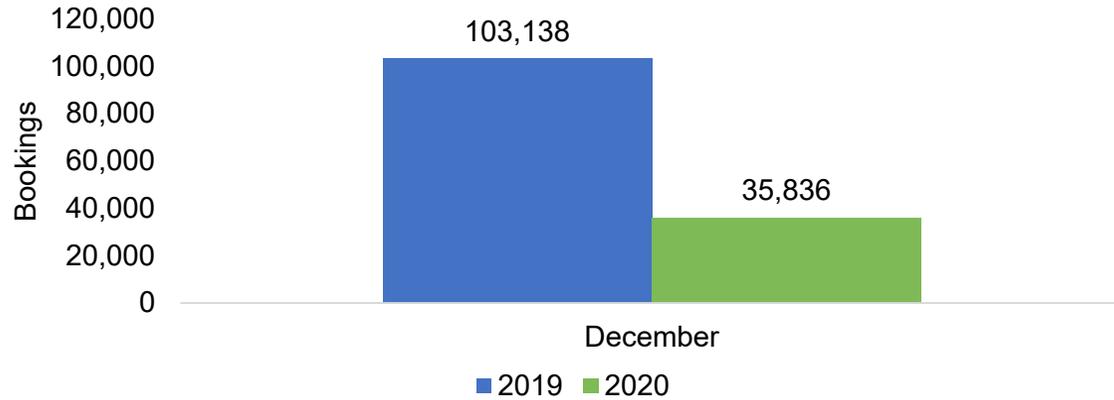
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 by Quarter



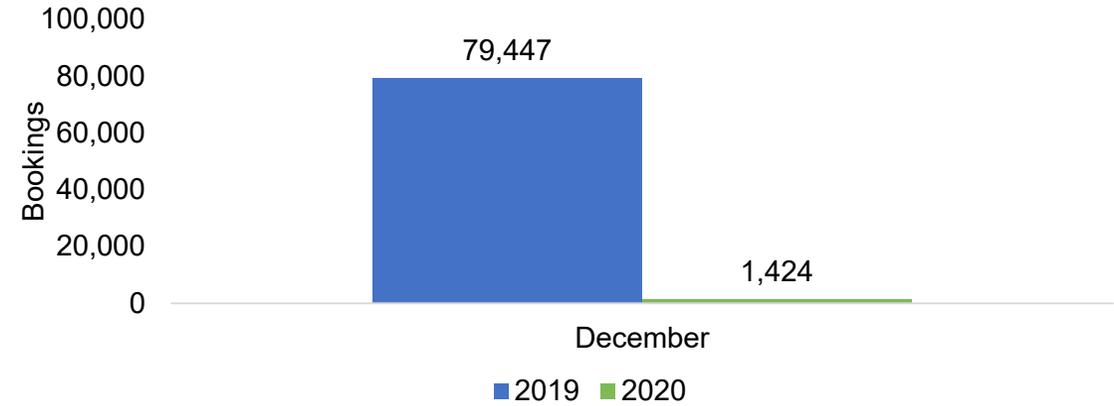
Source: Global Agency Pro as of 12/05/20

O'ahu by Month 2020

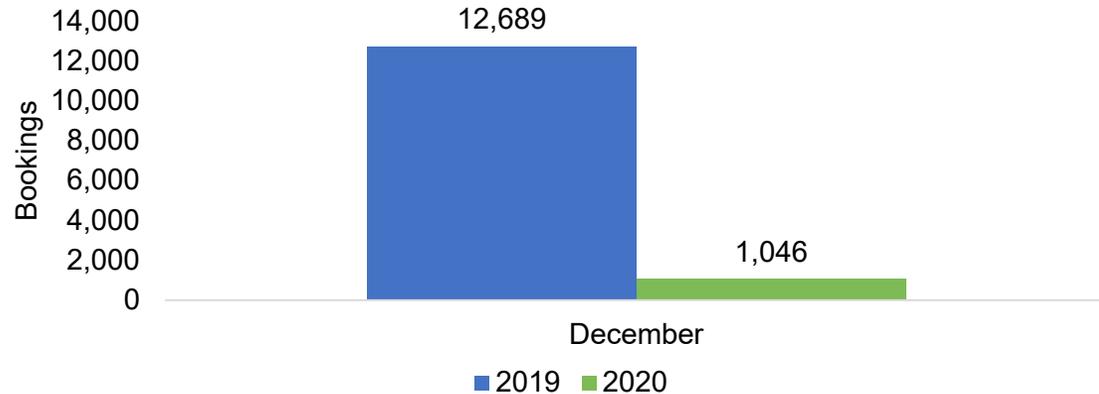
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.



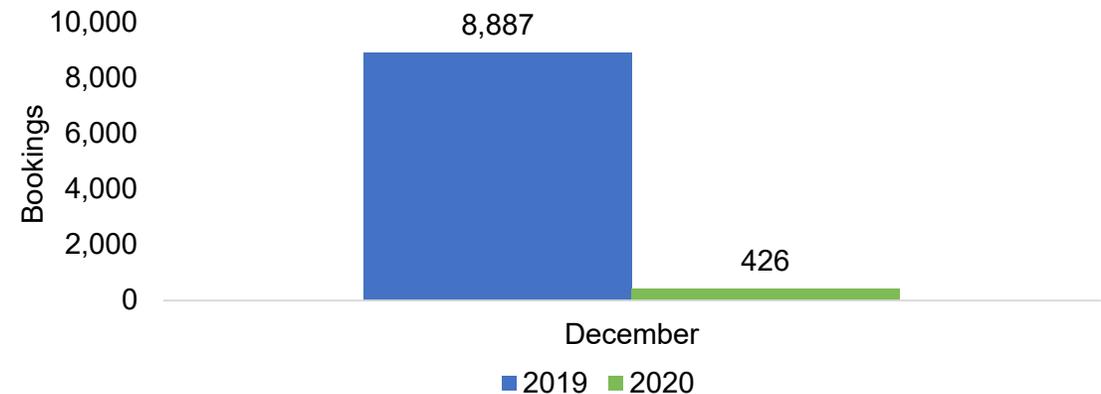
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan



Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada

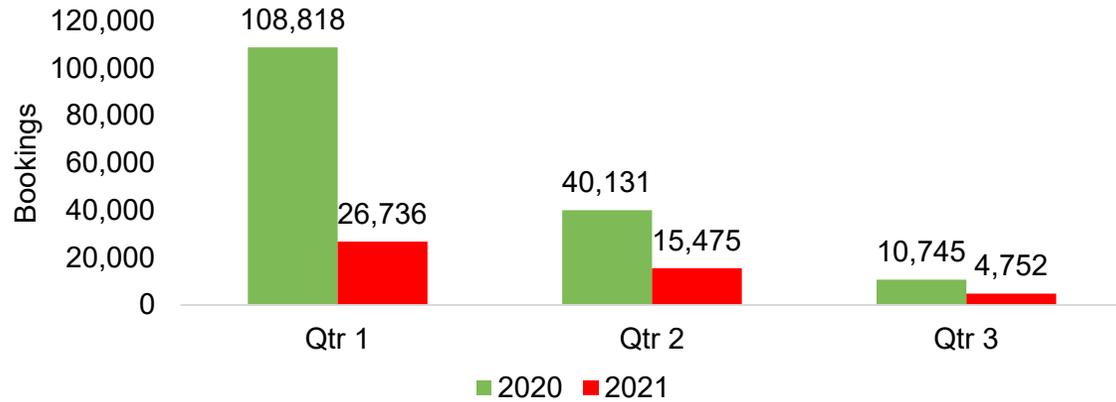


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia

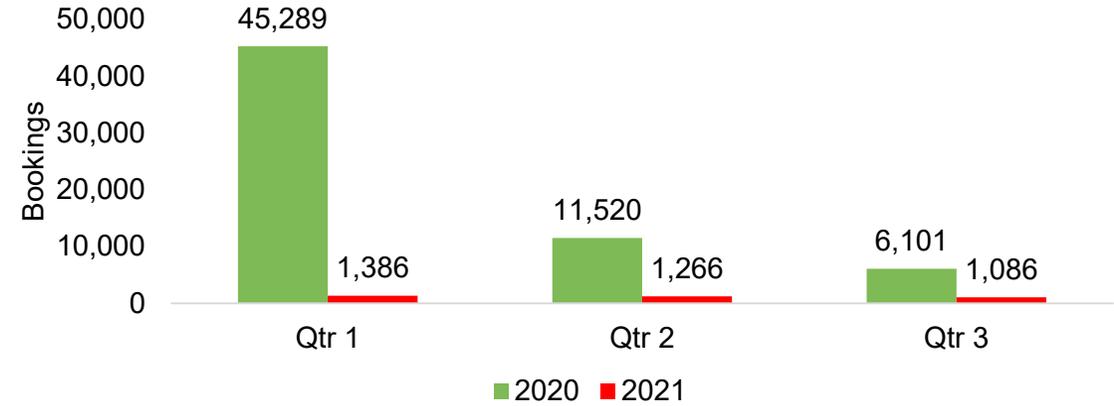


O'ahu by Quarter 2021

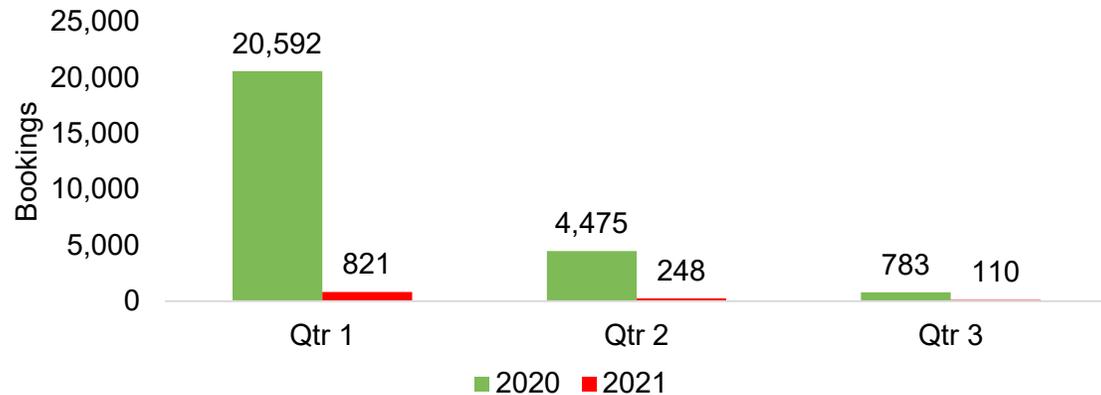
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



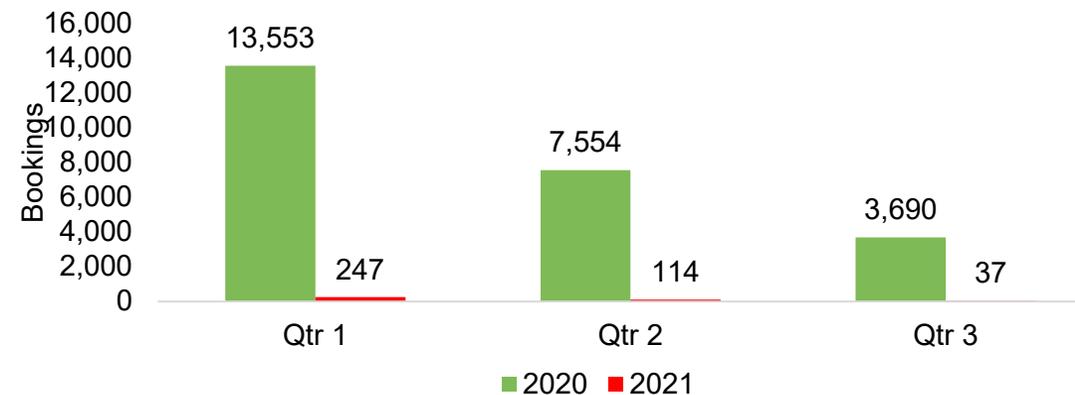
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Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Canada



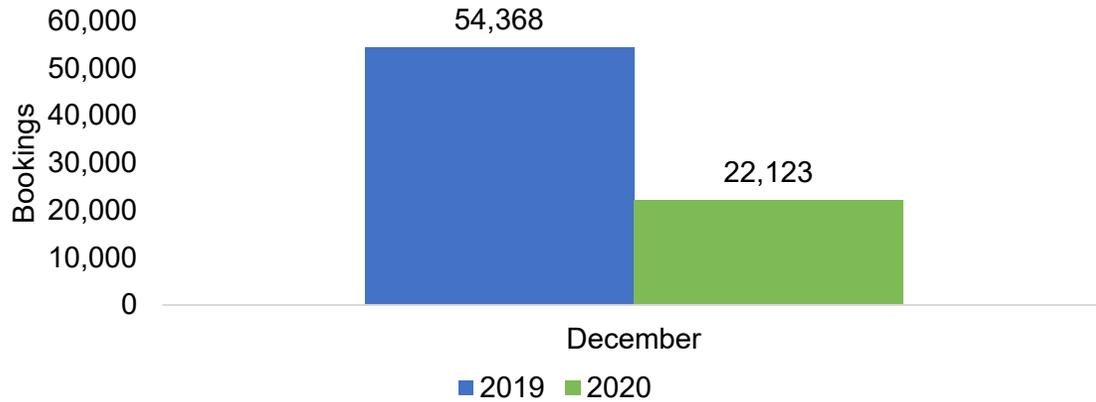
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



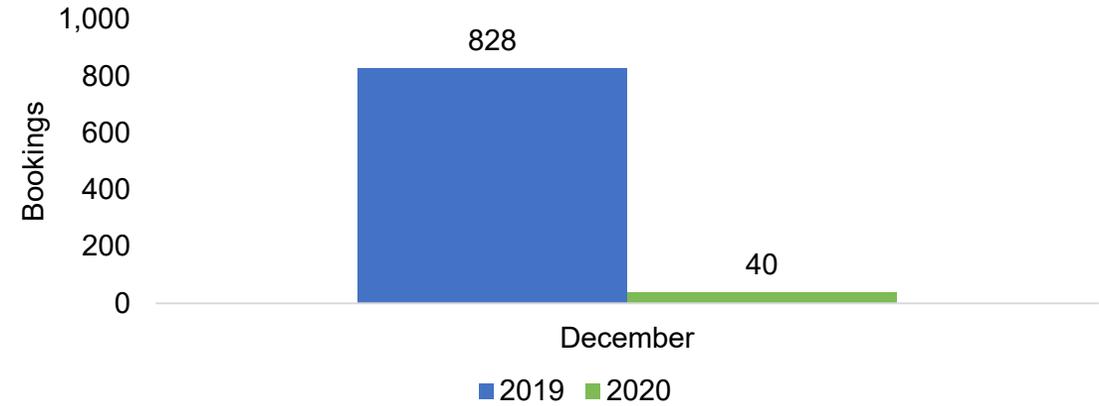
Source: Global Agency Pro as of 12/05/20

Maui by Month 2020

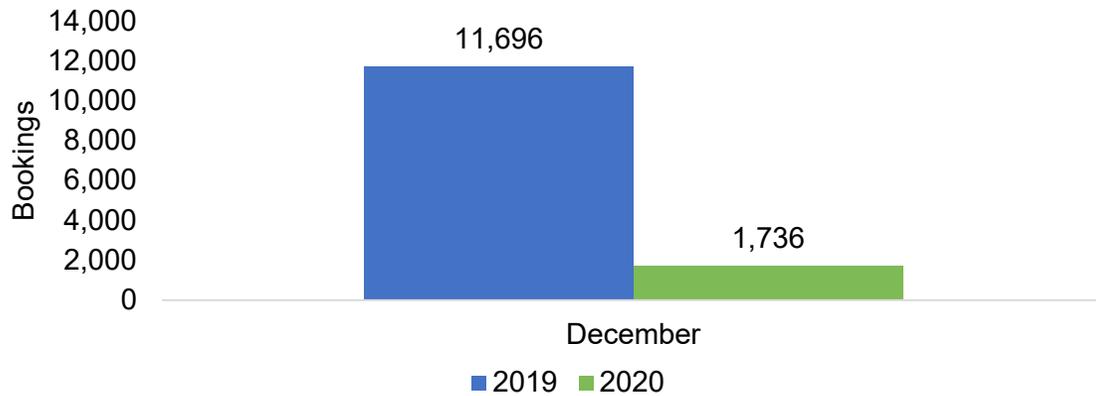
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.



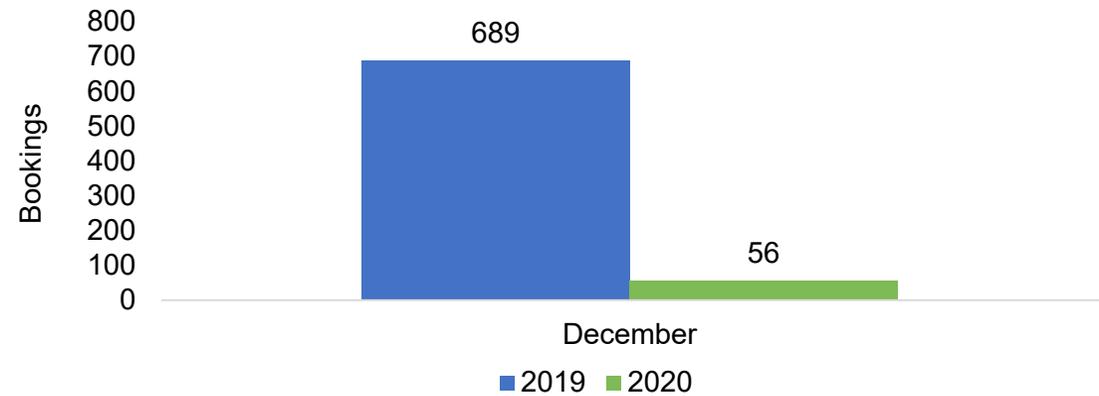
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan



Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada



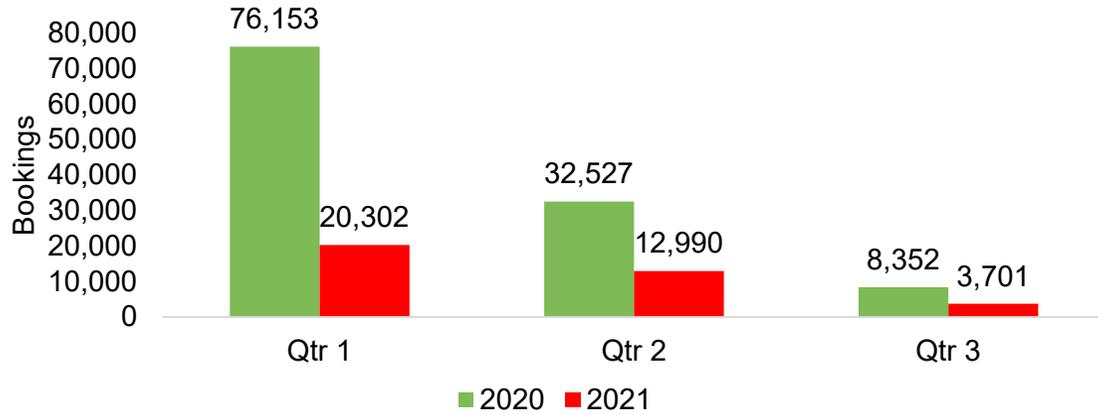
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia



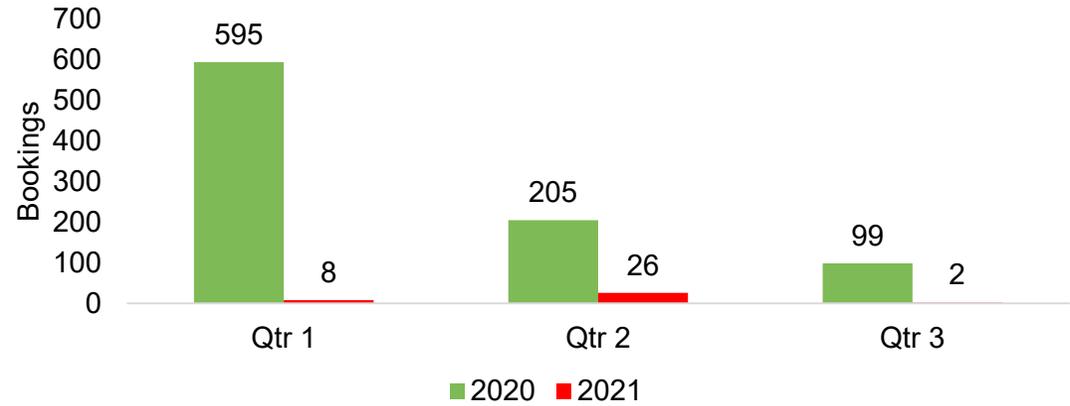
Source: Global Agency Pro as of 12/05/20

Maui by Quarter 2021

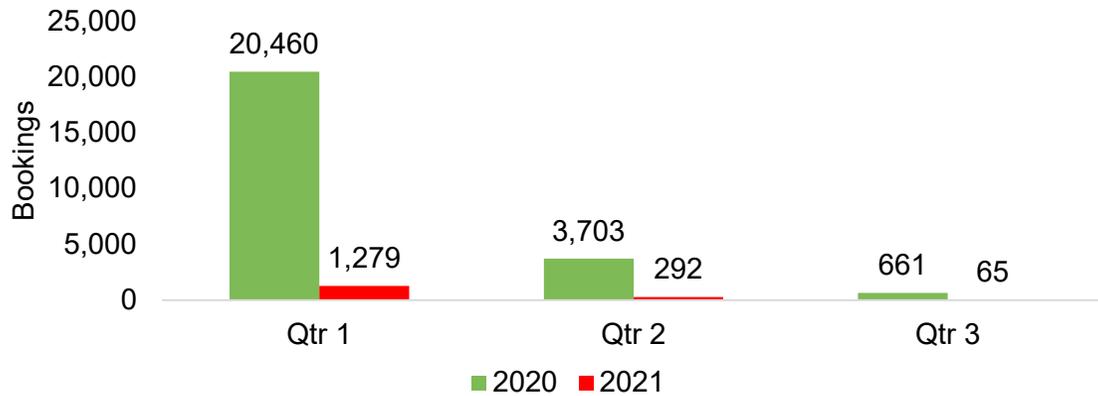
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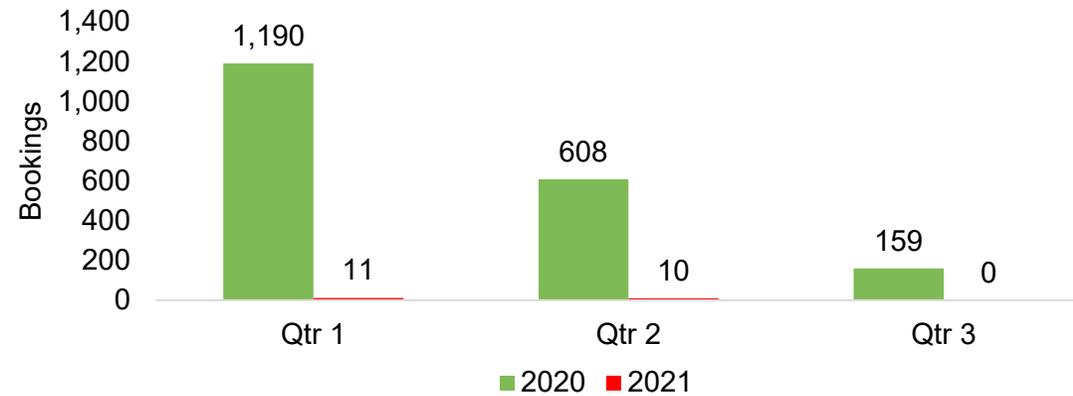
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Canada



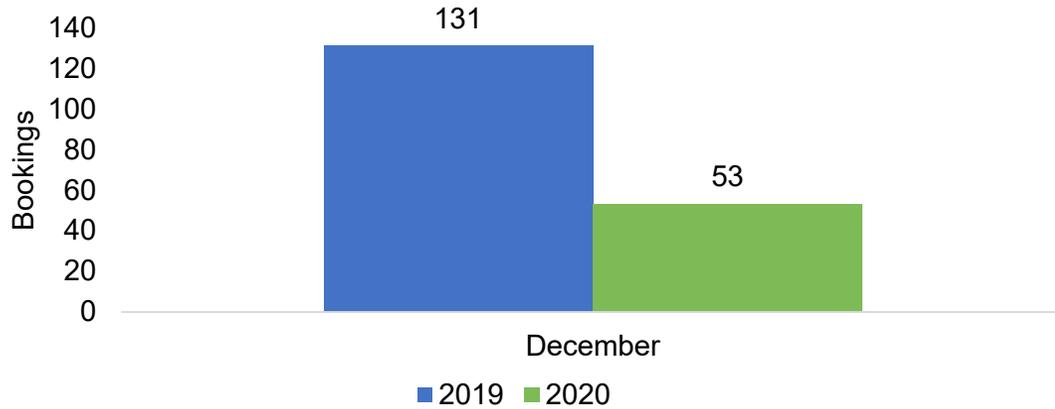
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



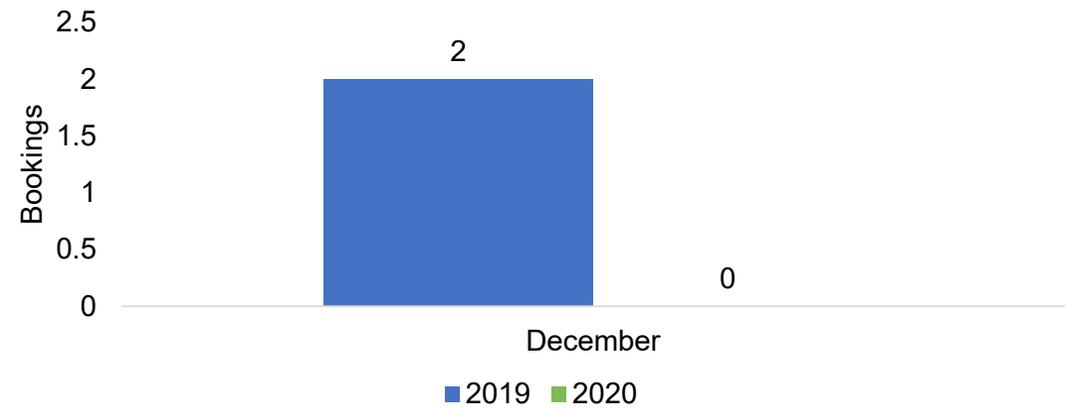
Source: Global Agency Pro as of 12/05/20

Moloka'i by Month 2020

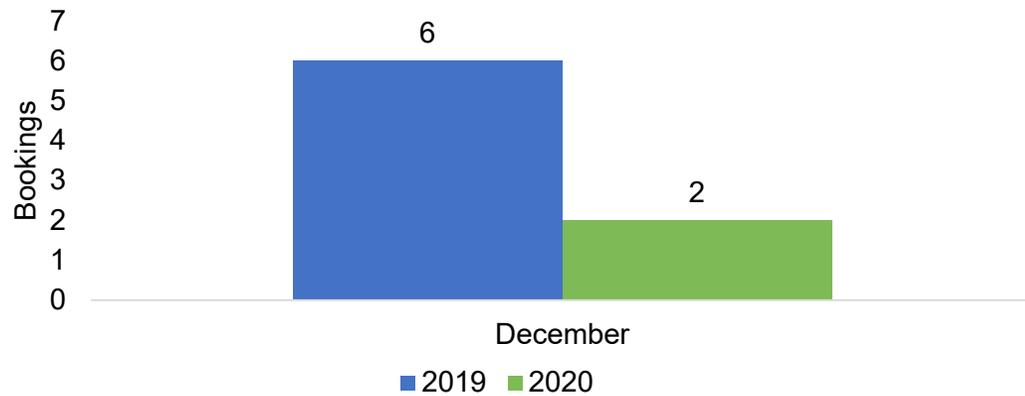
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.



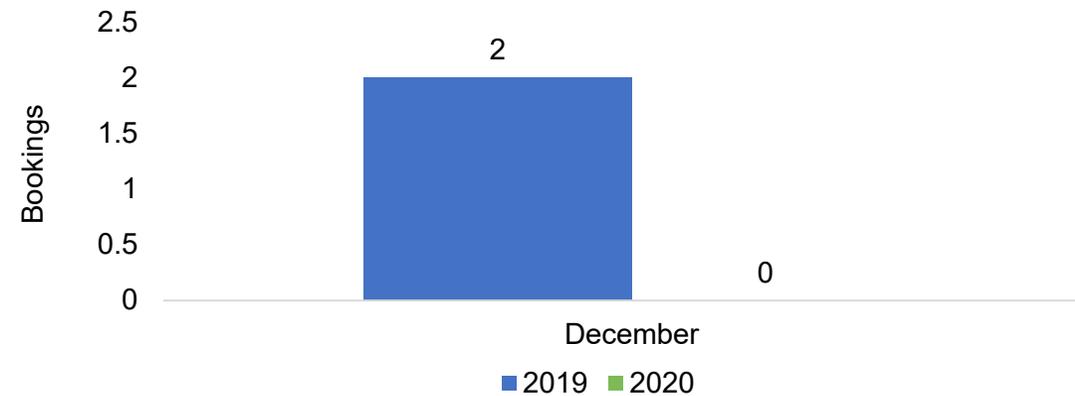
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan



Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada

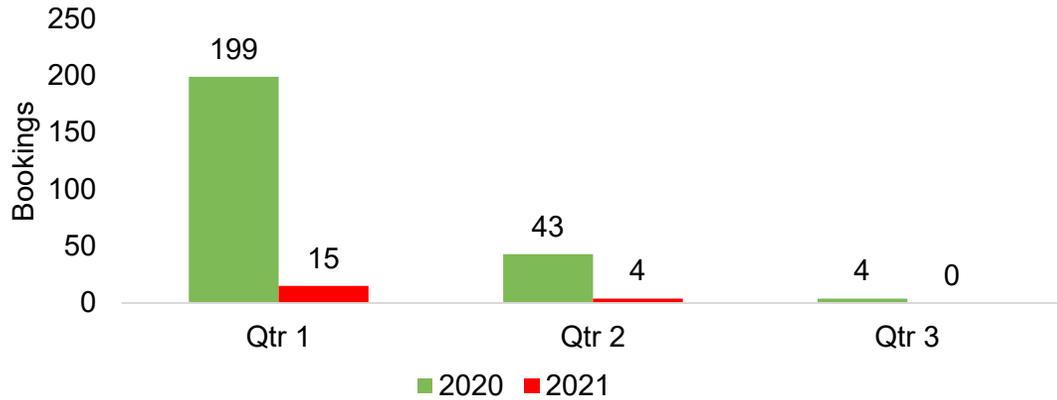


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia

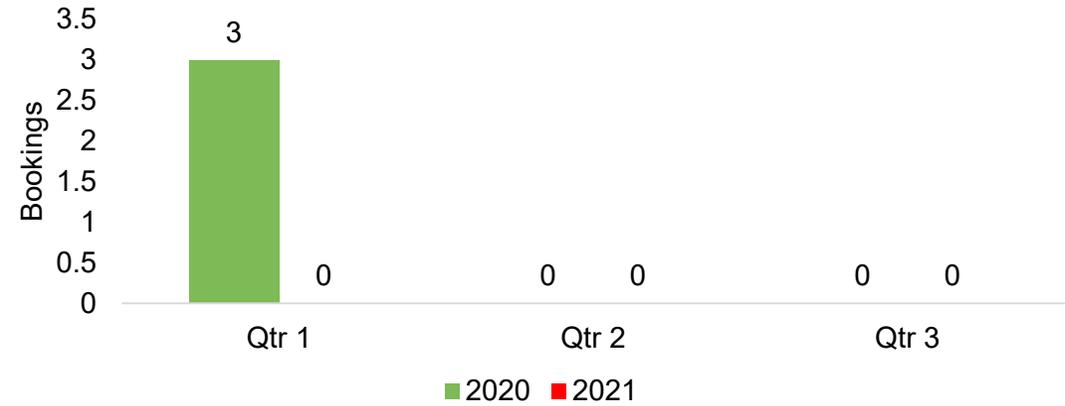


Moloka'i by Quarter 2021

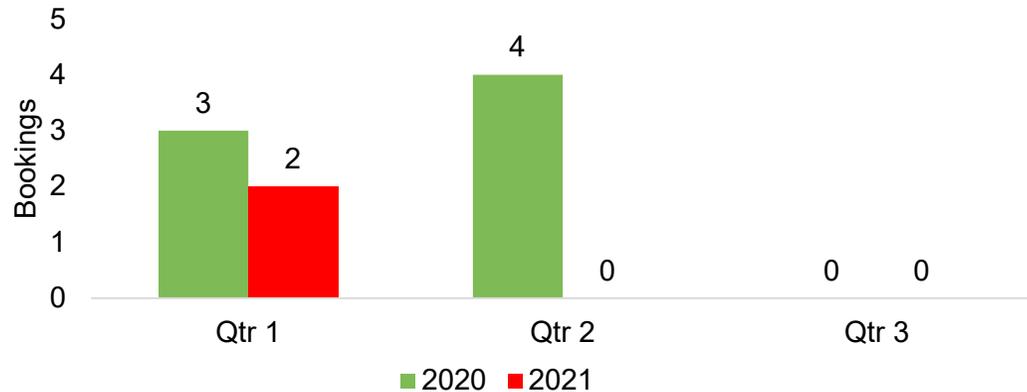
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



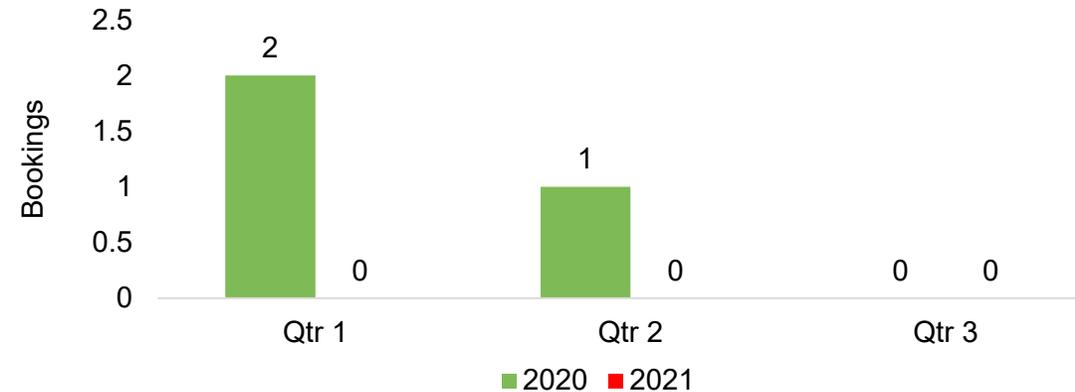
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Canada



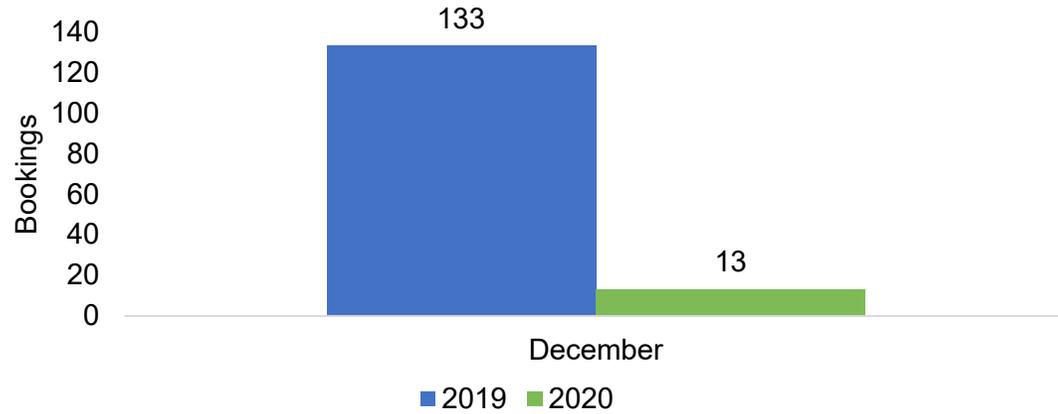
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



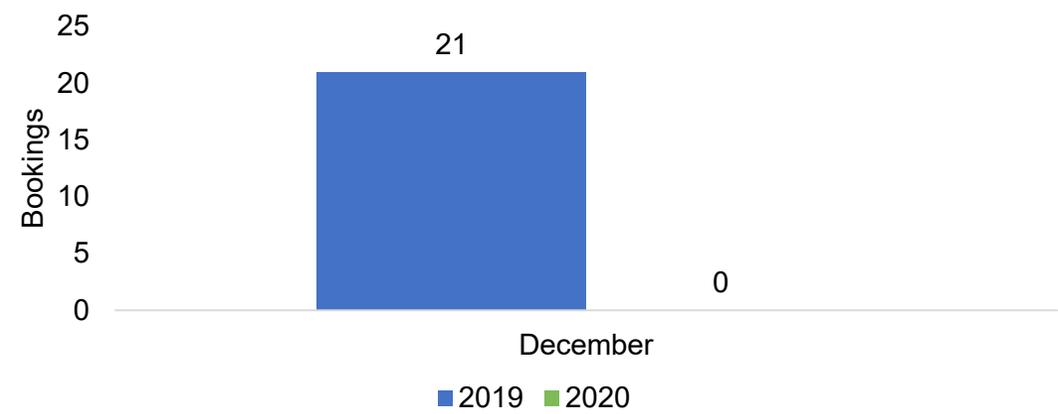
Source: Global Agency Pro as of 12/05/20

Lānaʻi by Month 2020

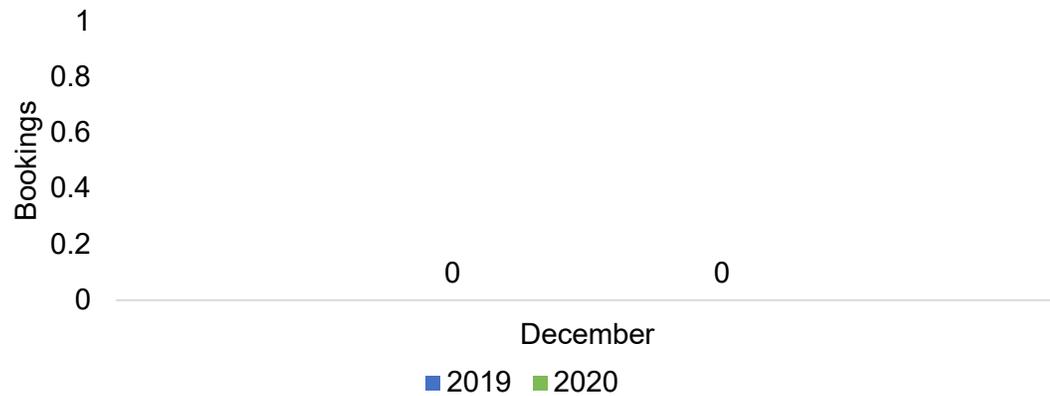
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.



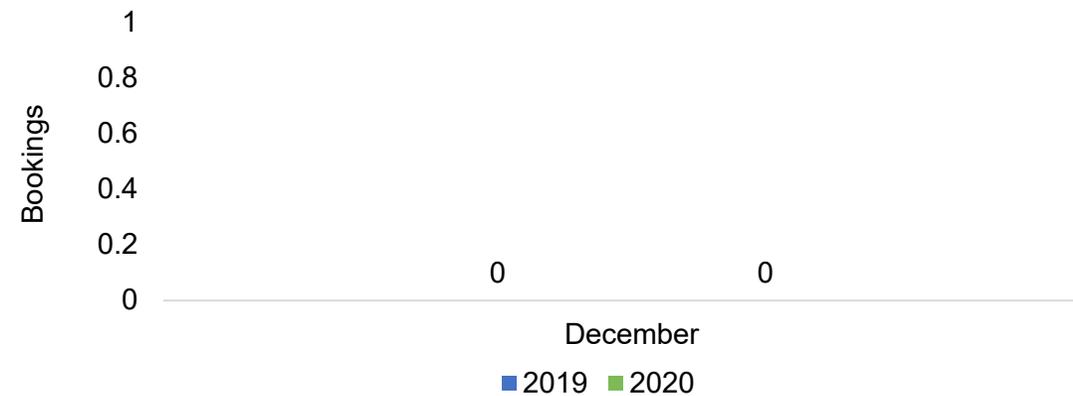
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan



Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada



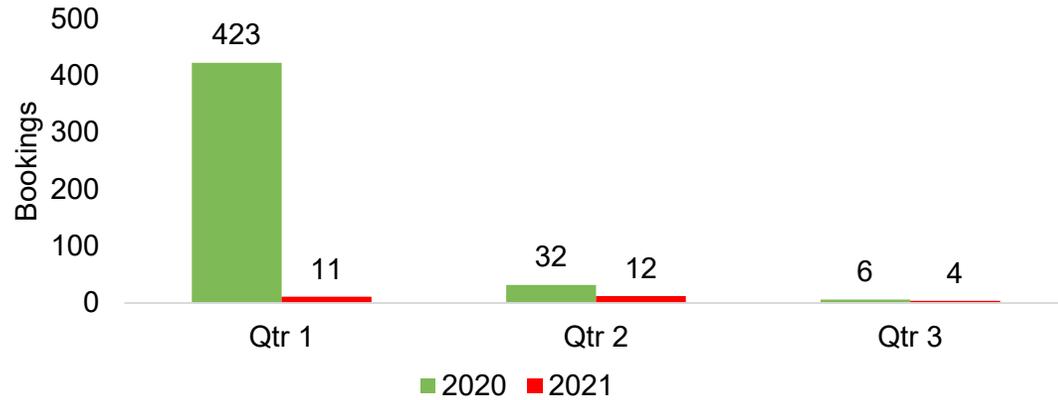
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia



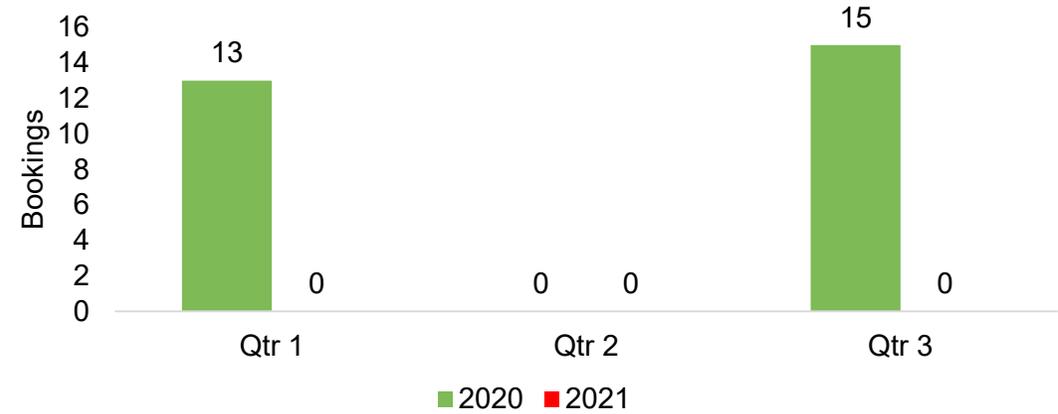
Source: Global Agency Pro as of 12/05/20

Lānaʻi by Quarter 2021

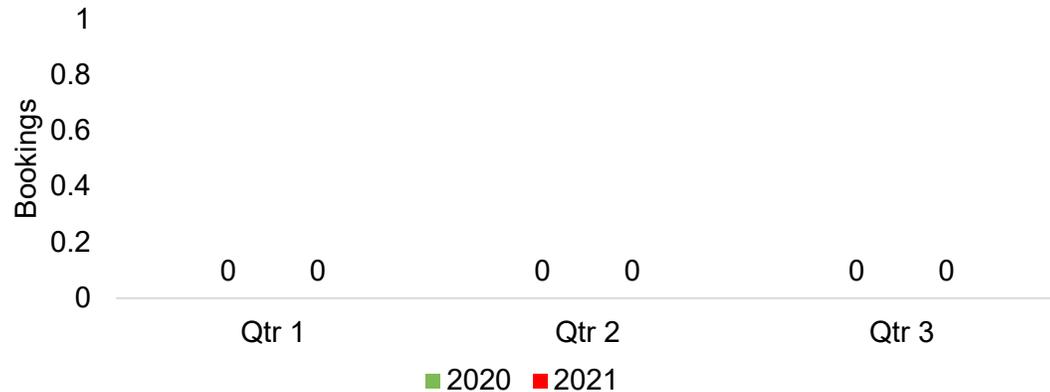
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



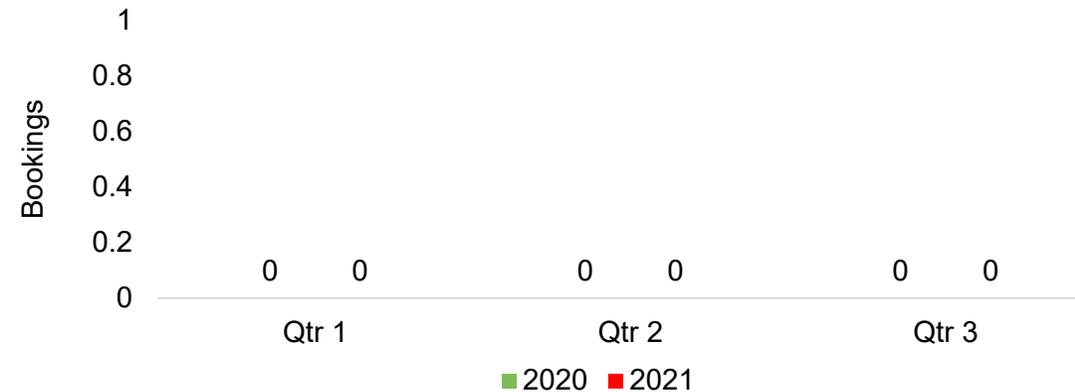
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Canada



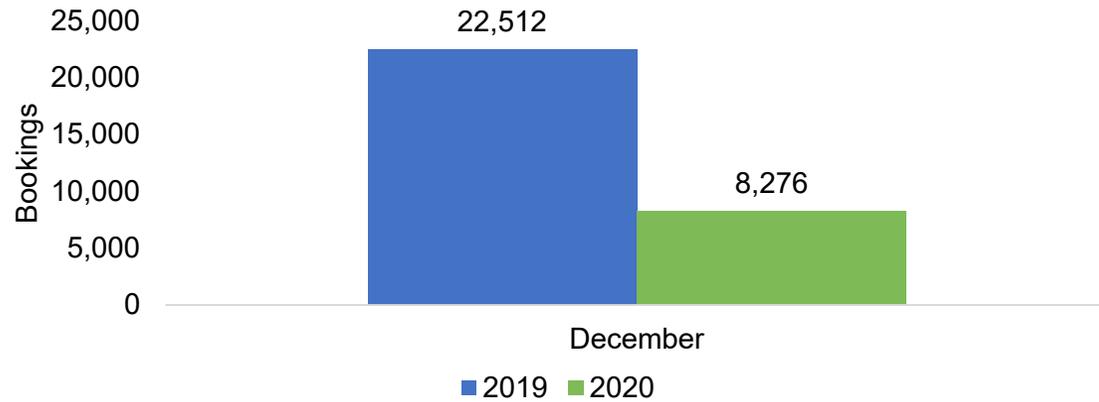
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



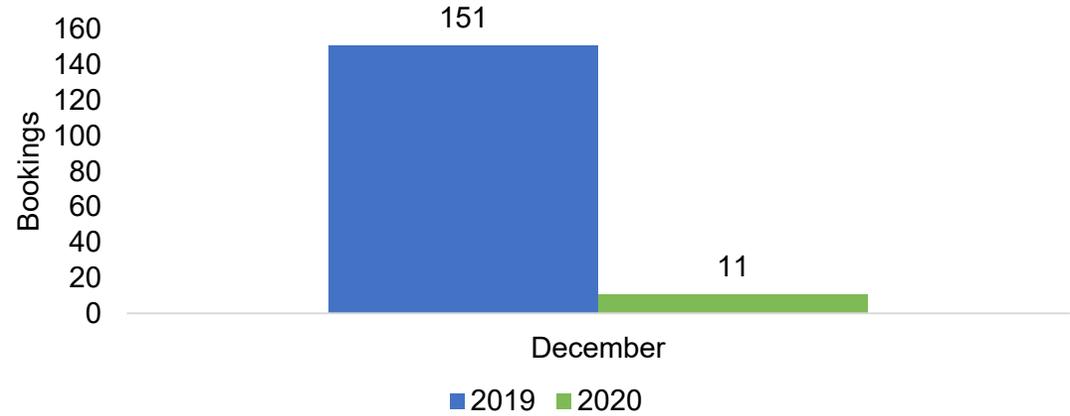
Source: Global Agency Pro as of 12/05/20

Kaua'i by Month 2020

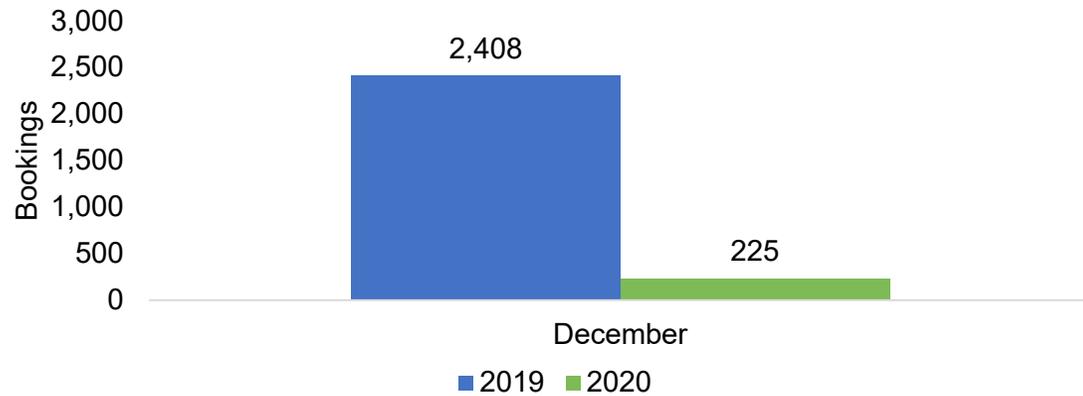
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.



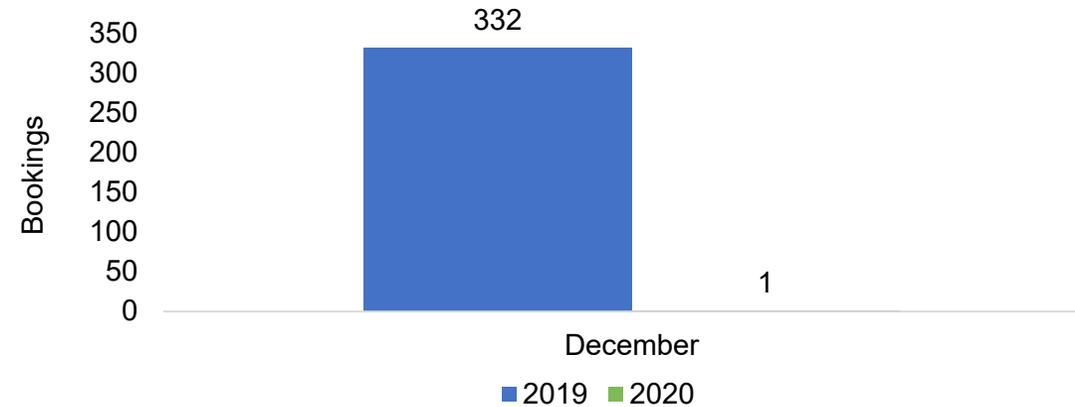
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan



Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada



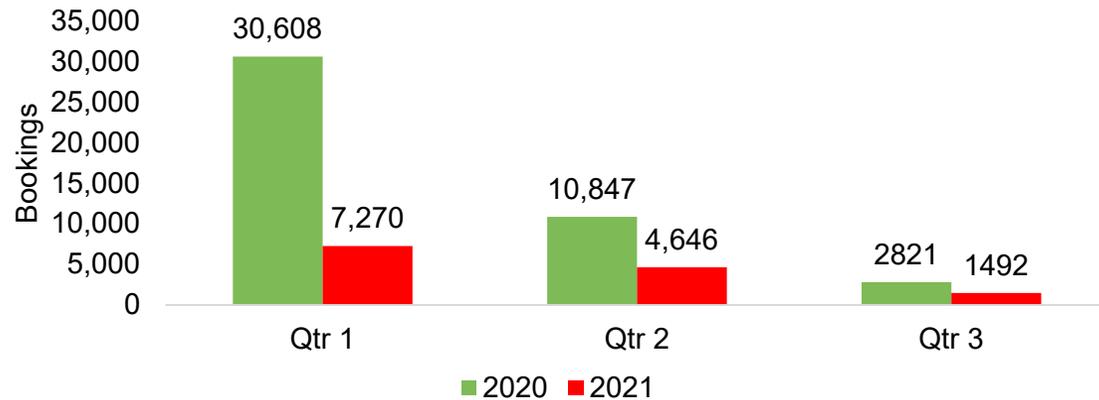
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia



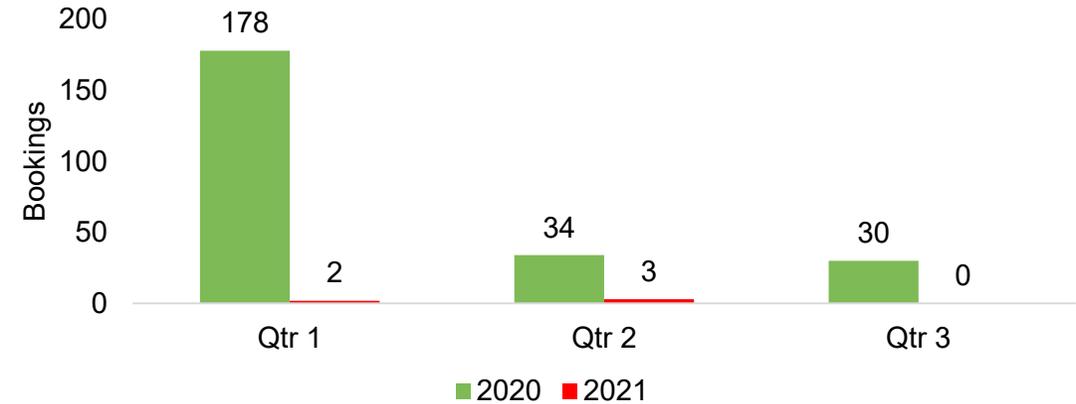
Source: Global Agency Pro as of 12/05/20

Kaua'i by Quarter 2021

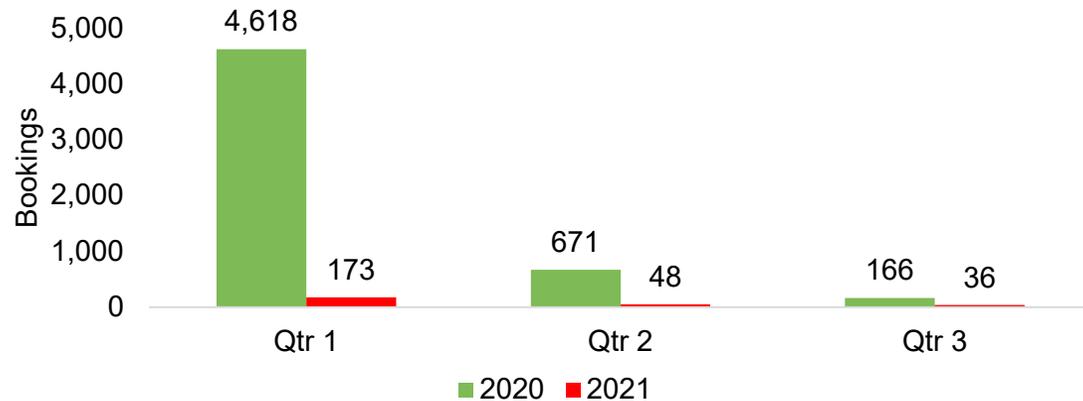
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



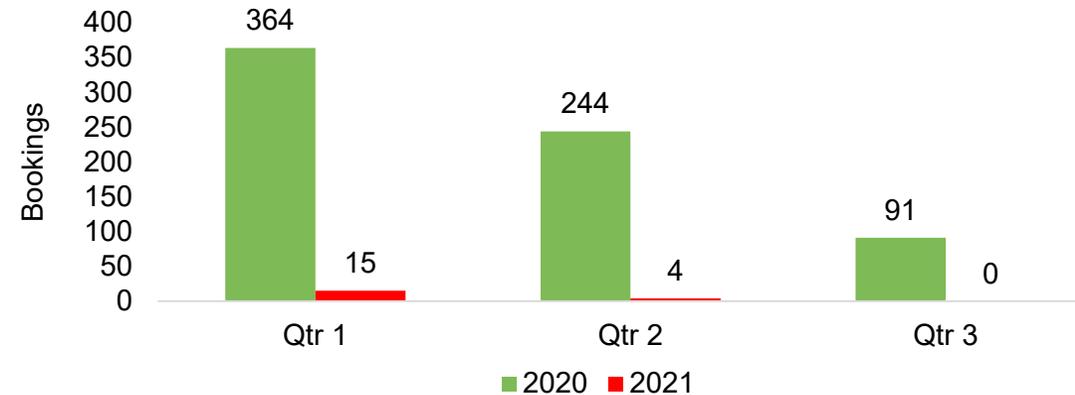
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Canada



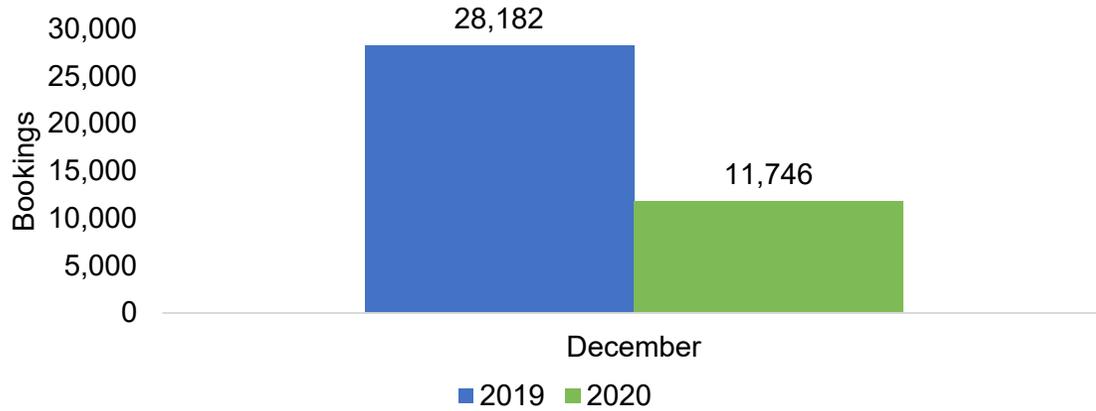
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



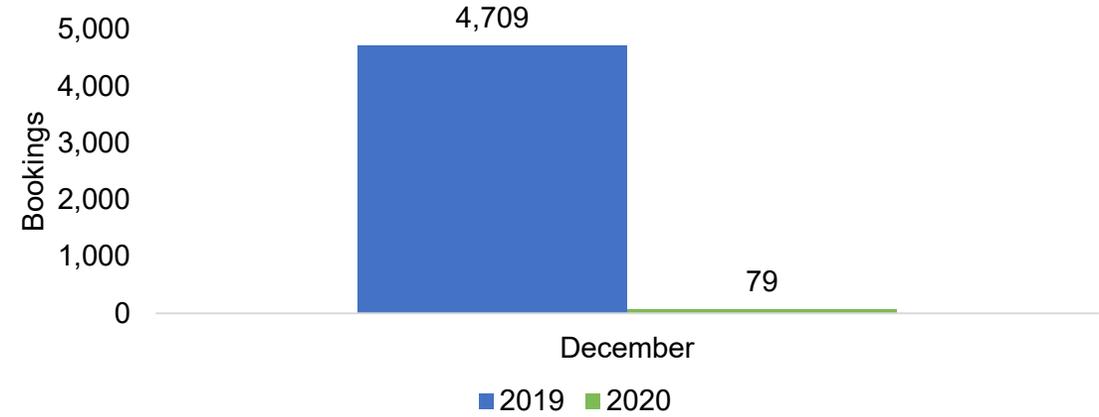
Source: Global Agency Pro as of 12/05/20

Hawai'i Island by Month 2020

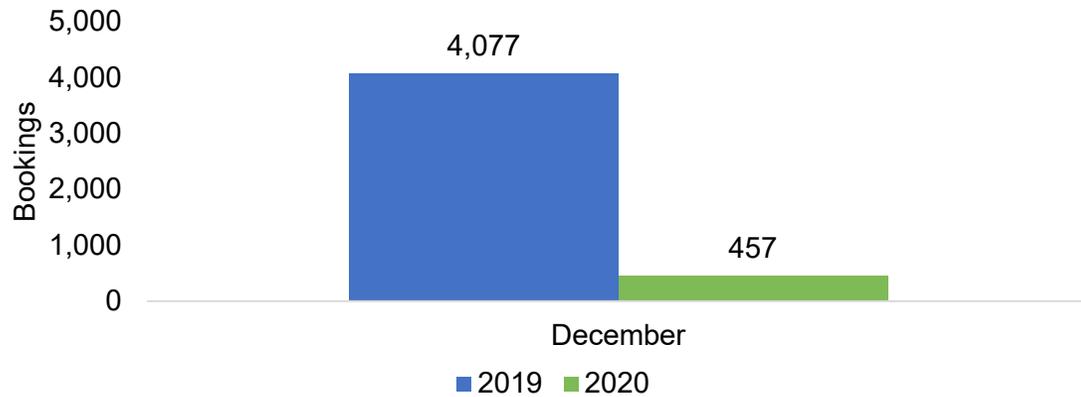
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - U.S.



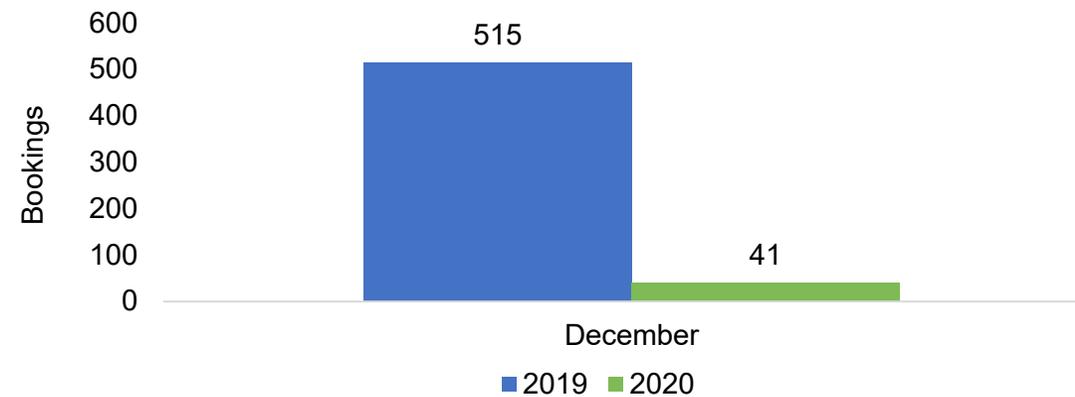
Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Japan



Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Canada

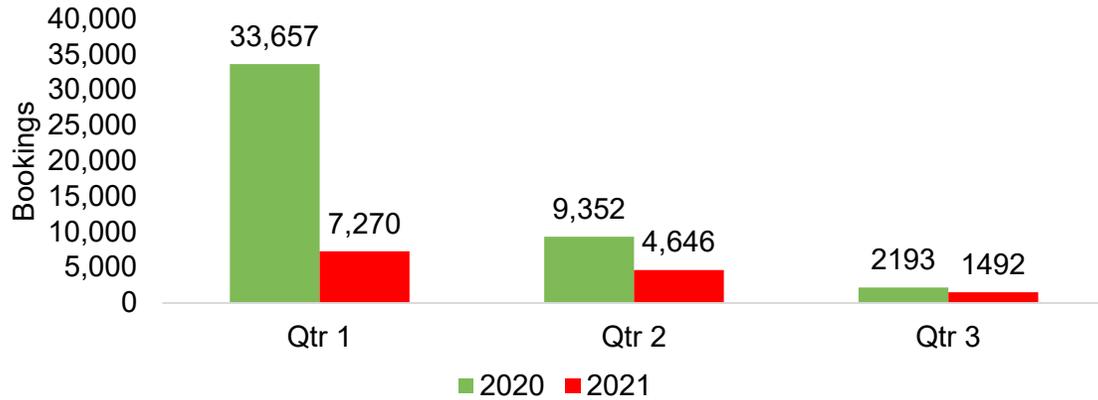


Travel Agency Booking Pace for Future Arrivals, 2020 vs 2019 - Australia

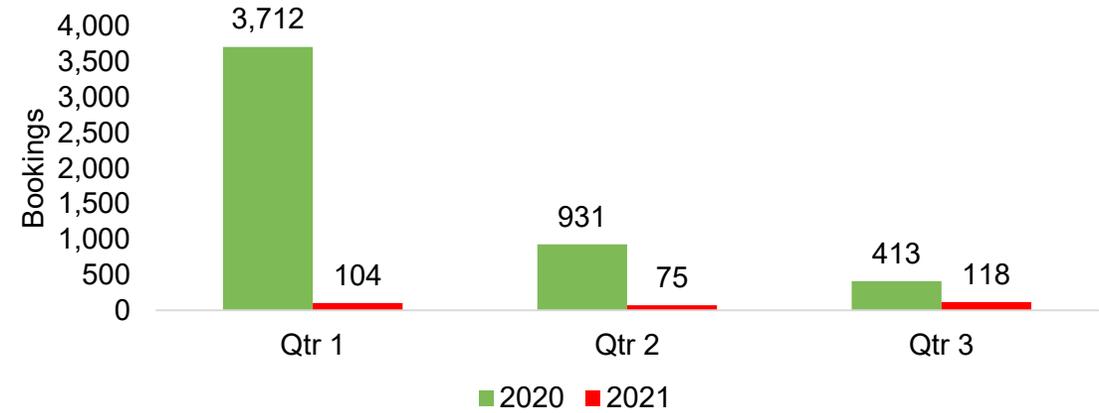


Hawai'i Island by Quarter 2021

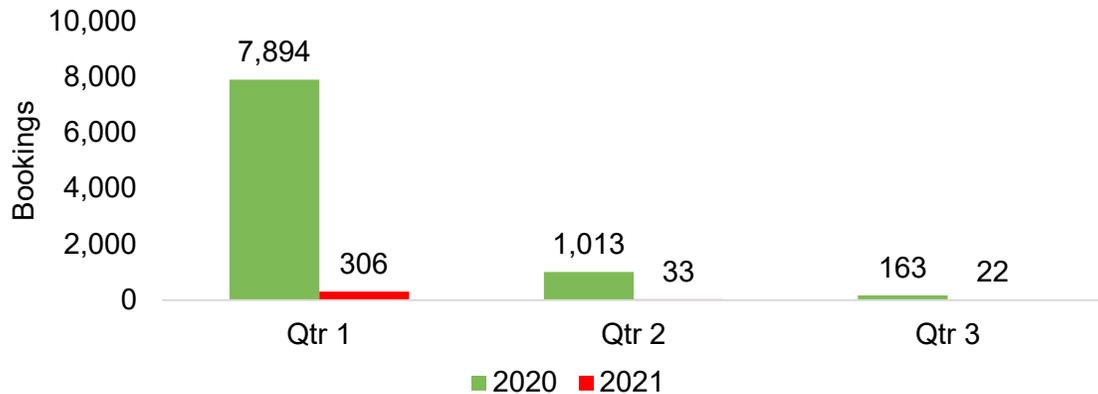
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



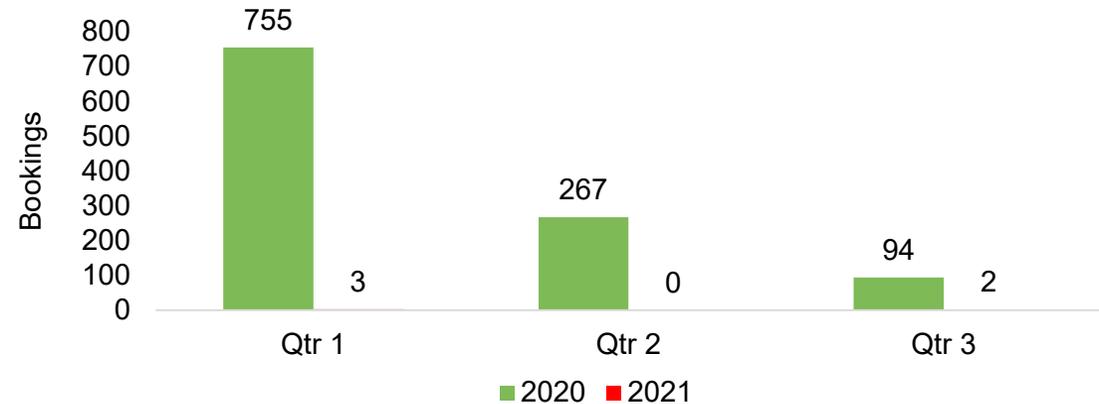
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Canada



Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



Source: Global Agency Pro as of 12/05/20

Agenda Item #7:

Presentation by HVCB on market insights, update on the Mālama Hawai'i program, and discussion on calendar year 2021 as it relates to certain assumptions and approaches including information pertaining to the PGA Tours messaging



HAWAII TOURISM AUTHORITY

Marketing Standing Committee Meeting

December 16, 2020

Agenda

1. Market Insights
2. Mālama Hawai'i
 1. Marketing Campaign Update
 2. Program Update
3. 2021
 - Assumptions/Approach
 - PGA Tour Messaging

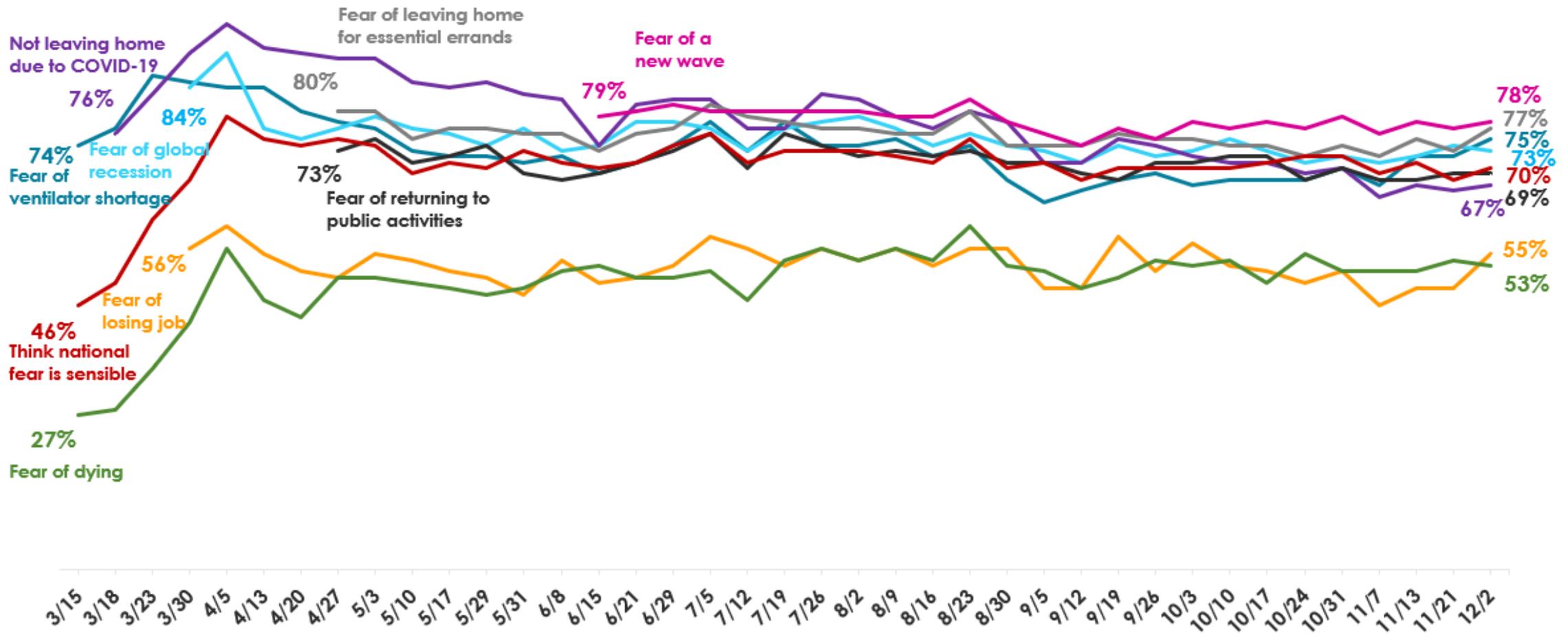




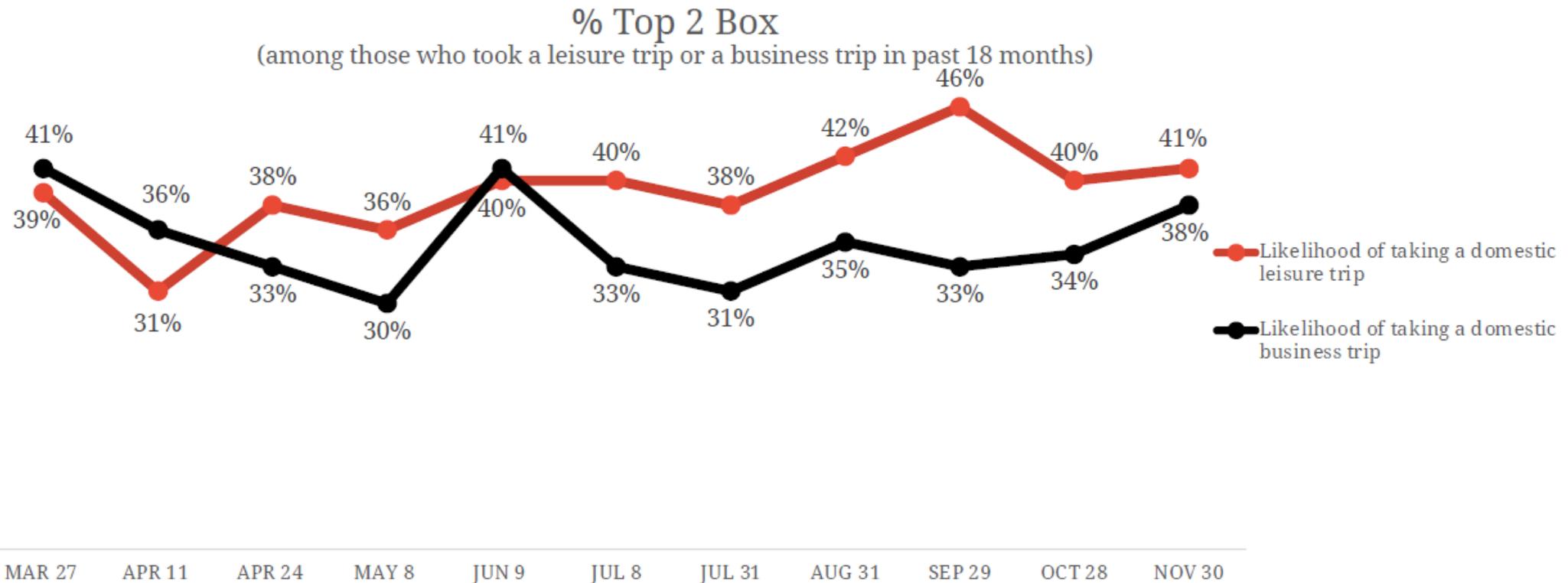
Market Insights

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

The Task: Working in an Environment of Fear



Likelihood Of Taking A Domestic Leisure Trip Declined as the Number of New COVID-19 Cases Continued to Rise (Next Six Months)



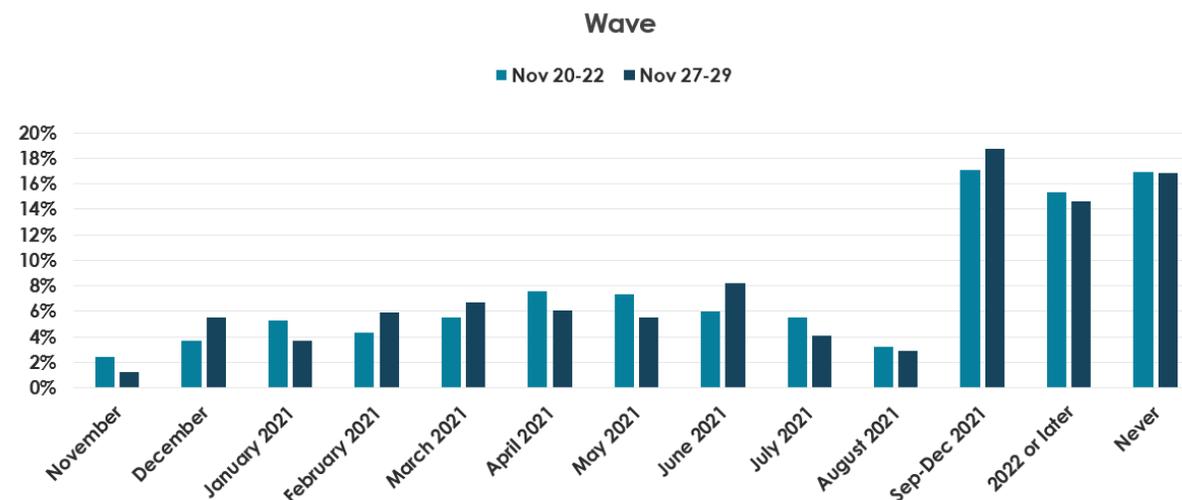
Question / Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months? (Leisure: n=1,164, Business: n=737)

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

- 56.9 percent say they would feel somewhat or very unsafe traveling on a commercial airline right now.
- The average distance away from home for American travelers' commercial airline trip is reported to be 1,057 miles.
- 80.6 percent of travelers expressed some level of concern for the national economy.
- 69.6 percent of Americans say they have some level of concern about contracting the virus.

Many American travelers are pushing their air trips to 2021.

One-third (33.3%) said they expect to take their next commercial airline trip sometime in September-December 2021 or later and haven't decided on a specific date.



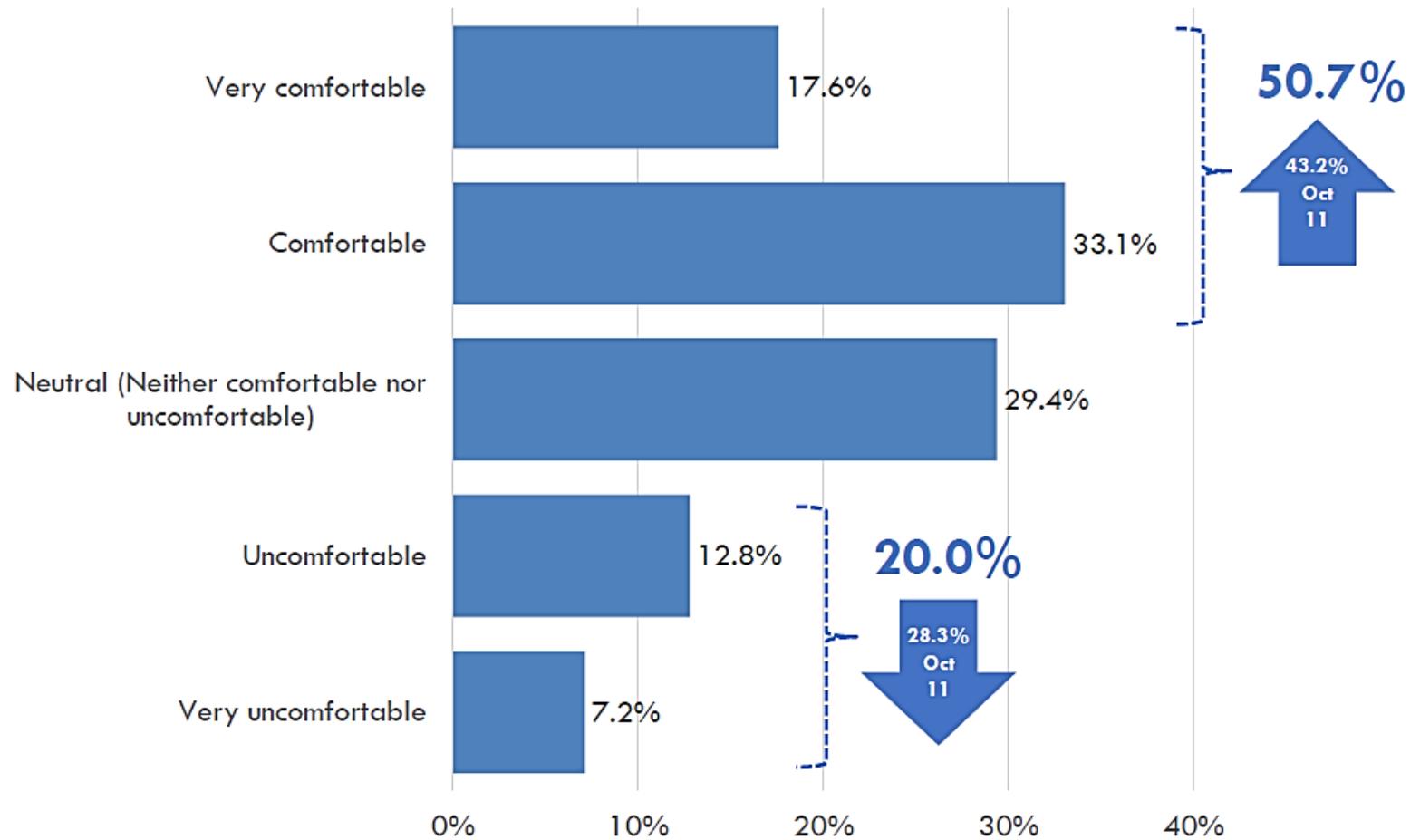
Source: Destination Analysts Coronavirus Travel Sentiment Index Report Wave 37-38

Onsite COVID-19 tests at airports

Question: If a commercial airline required all passengers to take a COVID-19 test prior to boarding the plane, how comfortable would you be taking a flight? (Select one)

(Assume all passengers must pass a fast COVID-19 test at the airport on the day of the flight)

(Base: Wave 33 data. All respondents, 1,203 completed surveys. Data collected Oct 23-25, 2020)

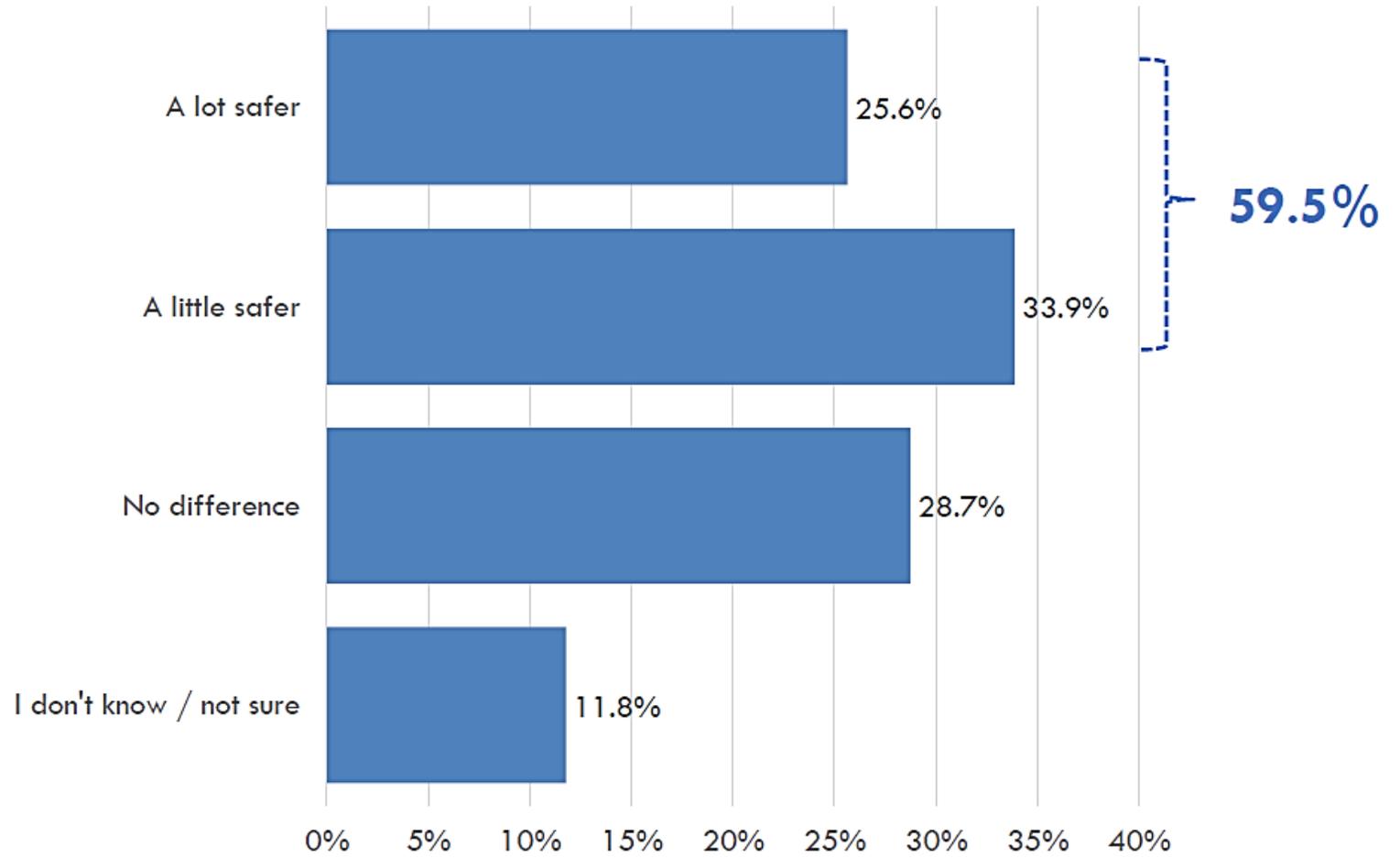


Vaccine Requirements for Air Travel

Question: If a **COMMERCIAL AIRLINE** required passengers to get the **COVID-19 vaccine** before traveling, how would that affect your view of the safety of traveling on that airline? (Select one to complete the sentence)

It would make me feel _____.

(Base: Wave 35 data. All respondents, 1,205 completed surveys. Data collected November 6-8, 2020)

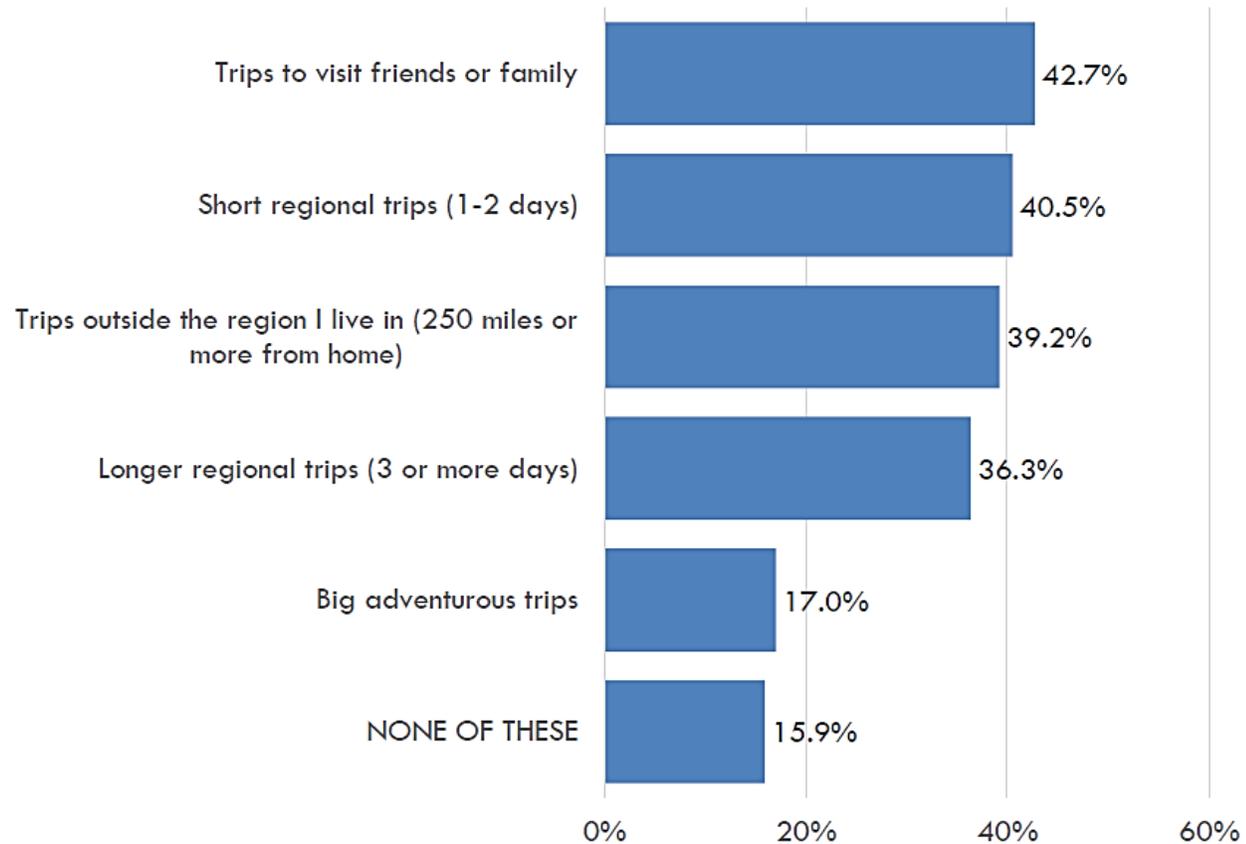


Trips Immediately after Vaccine Distribution

Question: Tell us about the trips you are likely to take after a COVID-19 vaccine becomes available.

In the THREE (3) MONTHS immediately after a COVID-19 vaccine is made widely available, which types of trips are you likely to take?

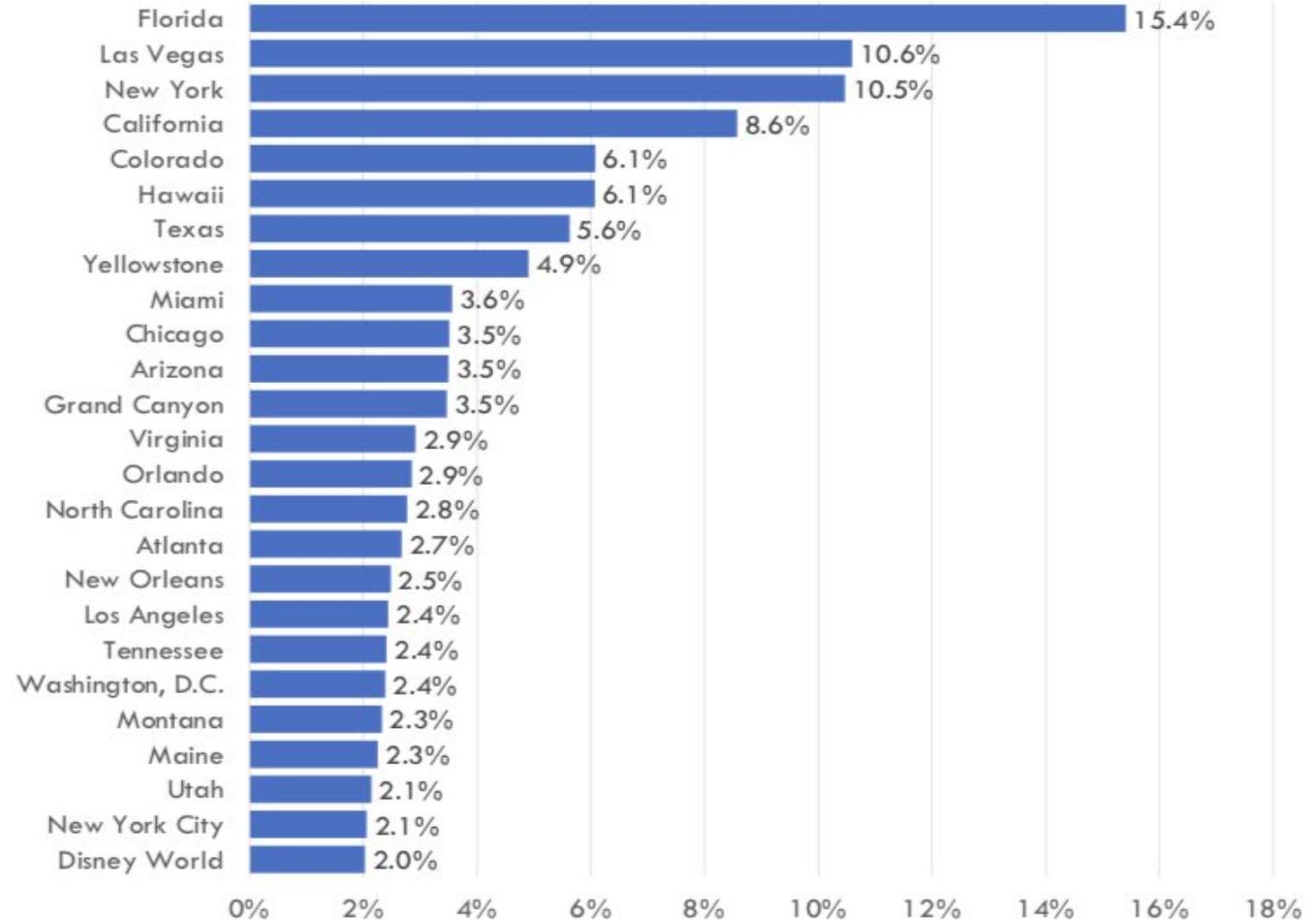
(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)



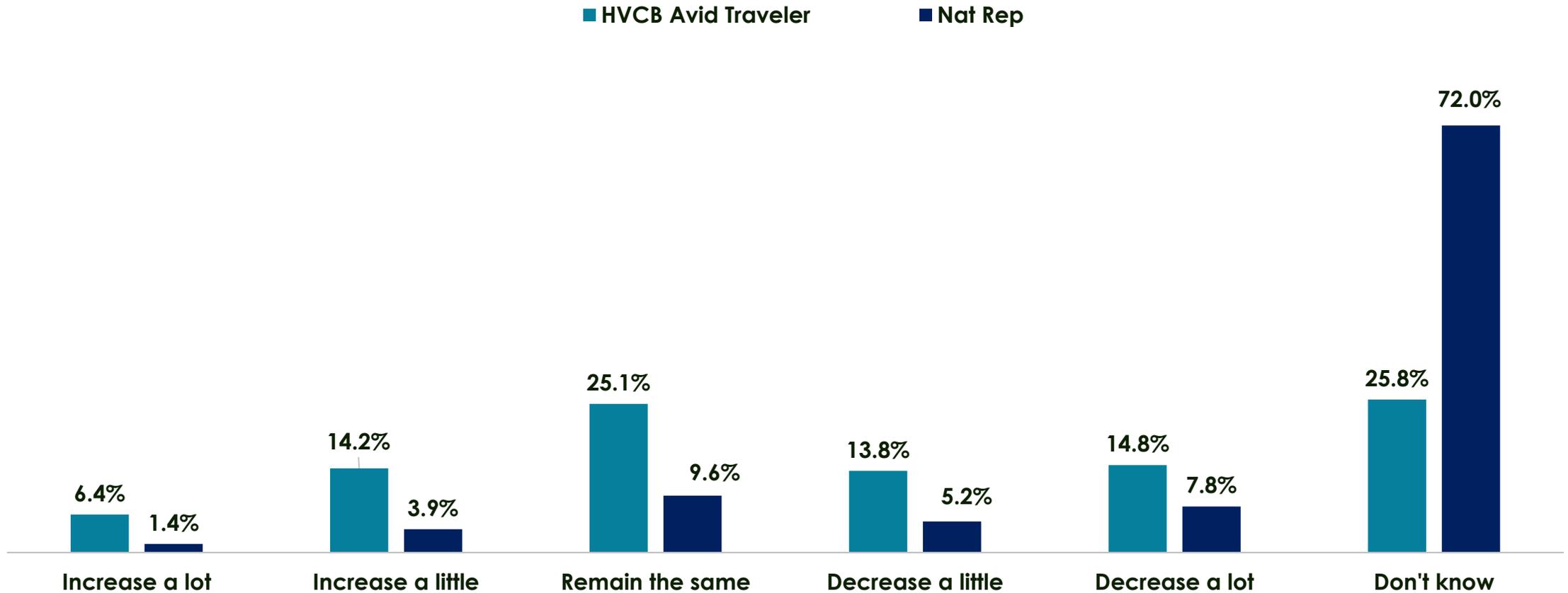
Domestic Destinations Planned for in 2021 (unaided)

Question: Which domestic destinations (if any) are you planning to visit or considering visiting next year (2021)? (Write in up to your top 3)

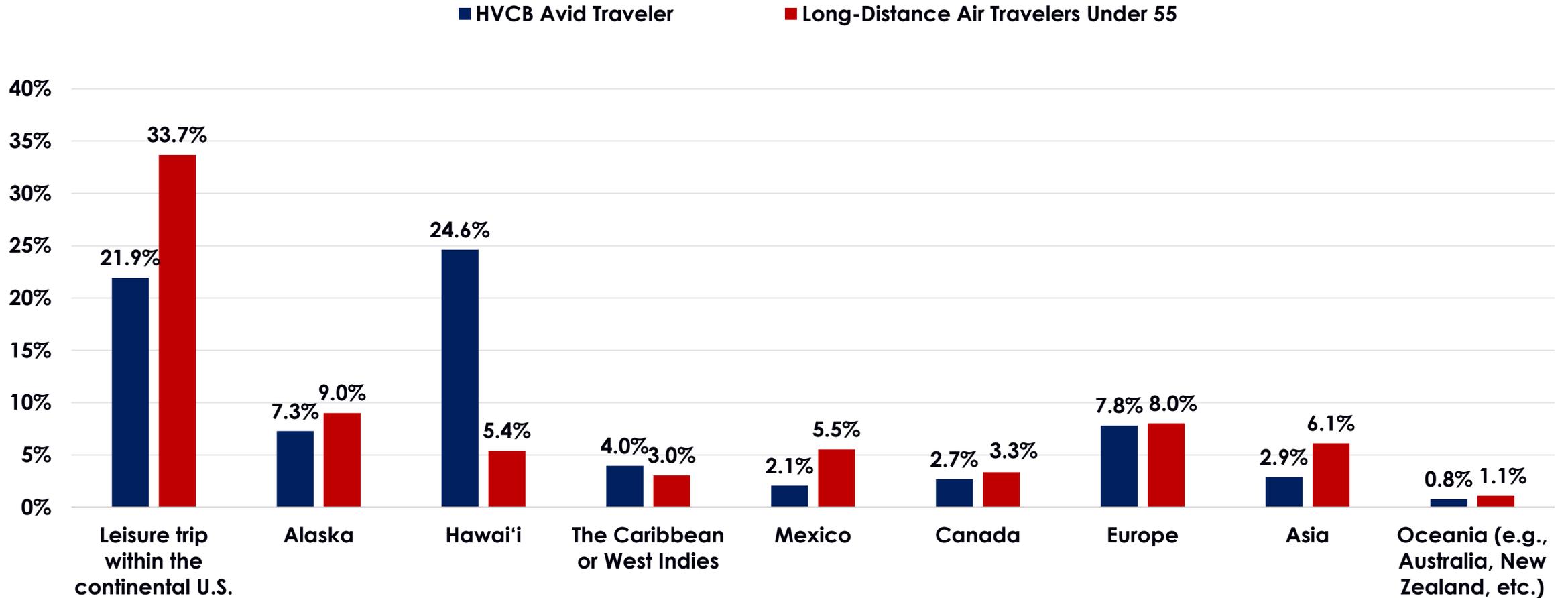
(Base: Wave 39 data. All respondents, 1,204 completed surveys. Data collected December 4-6, 2020)



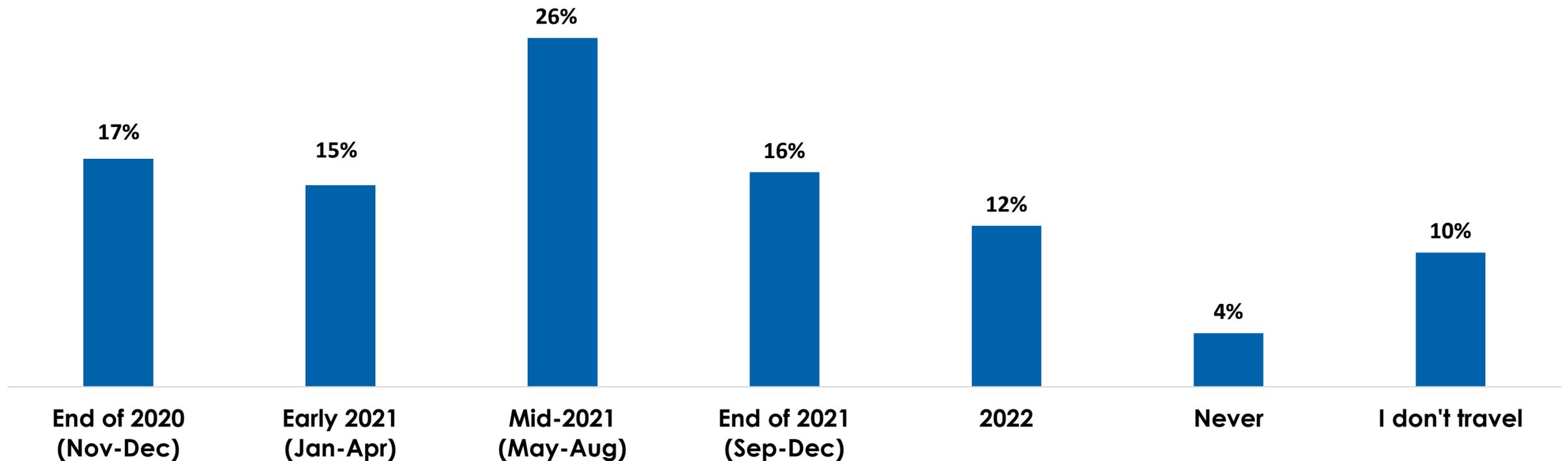
Future Travel – Expected change to air travel in the next 12 months



Next Leisure Destination

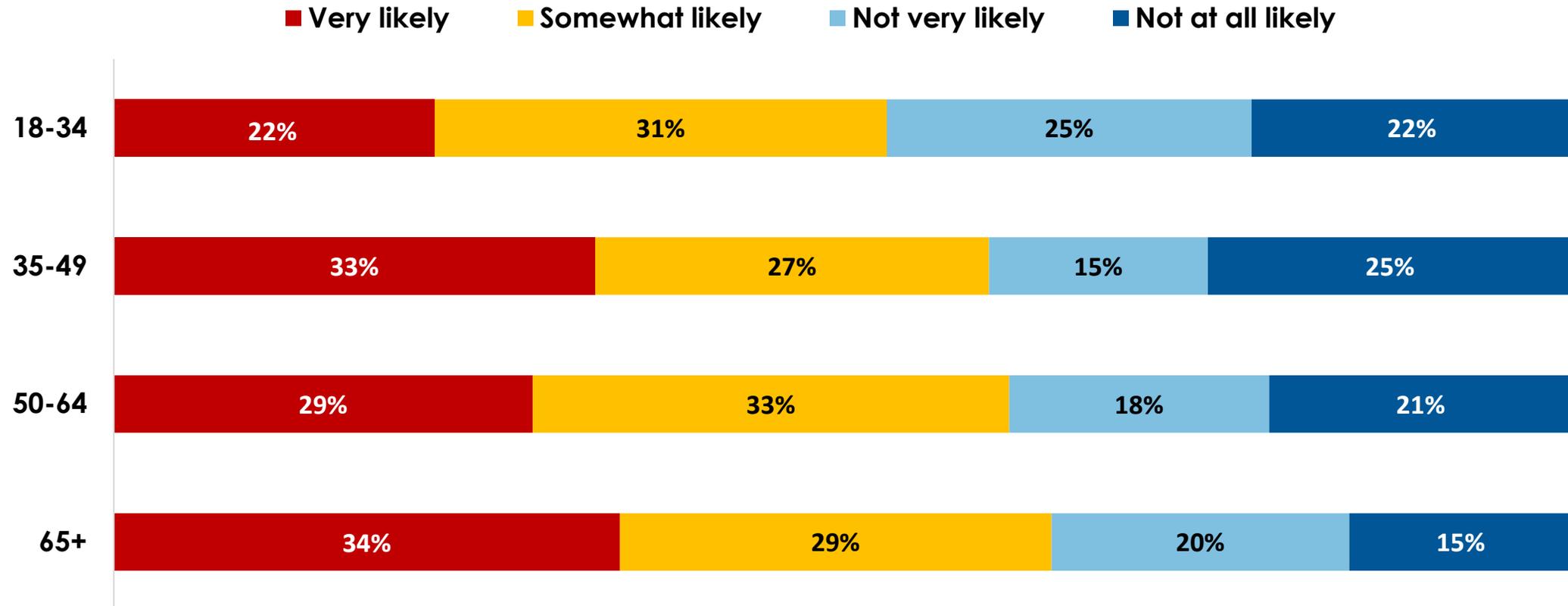


When, if ever, do you think you will be ready to travel?



How likely are you to get a COVID-19 vaccine as soon as it becomes available?

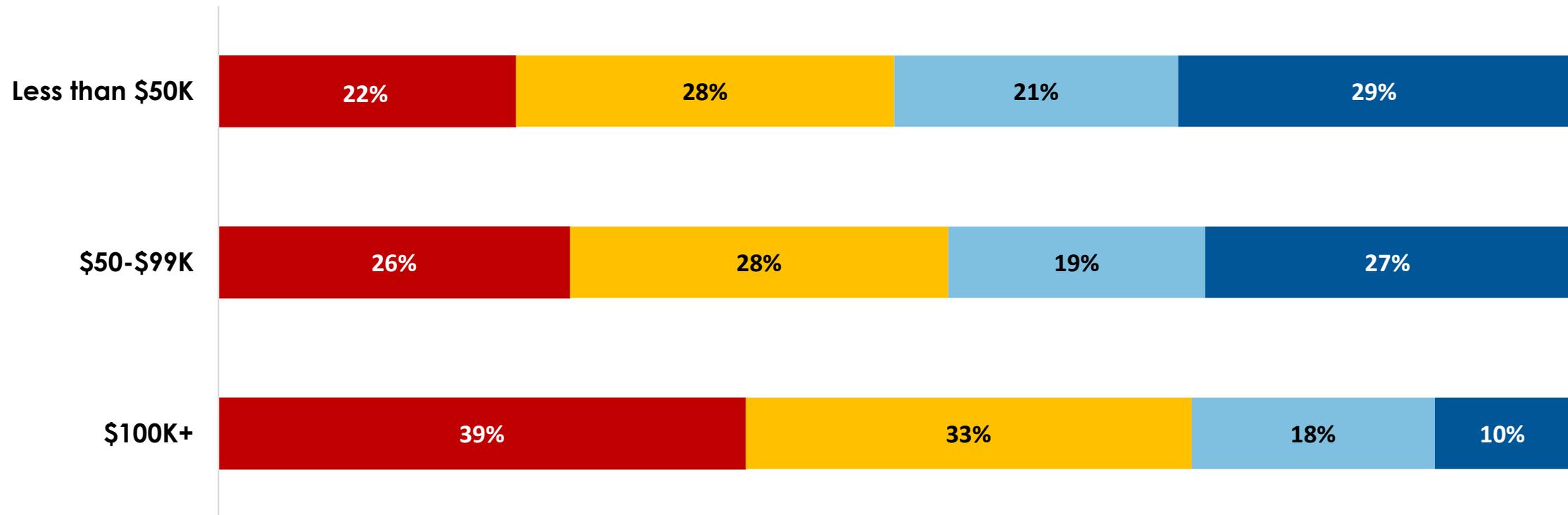
By Age



How likely are you to get a COVID-19 vaccine as soon as it becomes available?

By Income

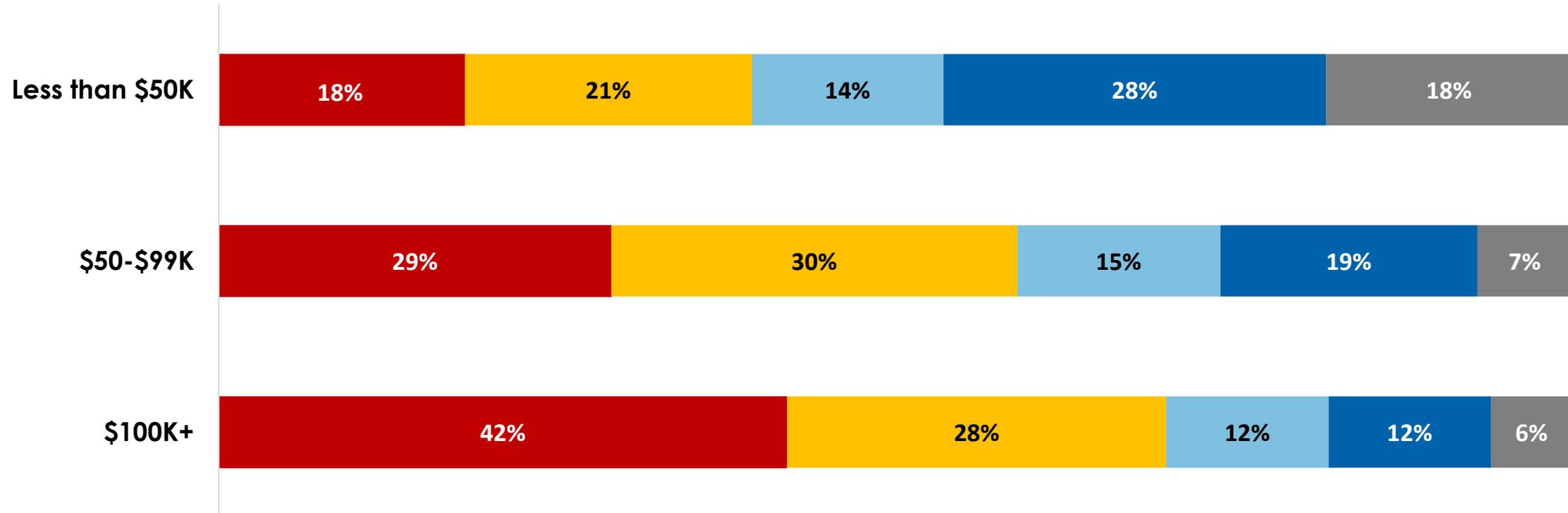
■ Very likely ■ Somewhat likely ■ Not very likely ■ Not at all likely



Once a COVID-19 vaccine is available, how likely are you to fly on an airplane?

By Income

Very likely Somewhat likely Not very likely Not at all likely N/A



Scheduled U.S. Seats to Hawai‘i –Oct, Nov, Dec 2020 & Jan 2021

Preliminary as of 12/1/20 –Subject to adjustment

	# of SEATS October 2019	# of SEATS October 2020	# of SEATS November 2019	# of SEATS November 2020	# of SEATS December 2019	# of SEATS December 2020	# of SEATS January 2020	# of SEATS January 2021
O‘ahu	399,574	141,876	395,176	219,290	456,929	302,803	429,135	338,564
Maui	211,816	35,352	209,739	107,560	250,970	175,758	232,723	205,496
Kaua‘i	72,357	14,736	77,342	49,218	87,481	69,980	77,465	73,851
Kona	72,590	23,045	78,213	45,458	98,565	78,862	101,061	89,908
Hilo	4,648		3,818		4,316		2,656	3,320
Total	760,985	215,009	764,288	421,726	898,261	627,223	843,040	711,139

Scheduled U.S. Seats to Hawai'i –Oct, Nov, Dec 2020 & Jan 2021

Preliminary as of 12/10/20 –Subject to adjustment

	# of SEATS October 2019	# of SEATS October 2020	# of SEATS November 2019	# of SEATS November 2020	# of SEATS December 2019	# of SEATS December 2020	# of SEATS January 2020	# of SEATS January 2021
O'ahu	399,574	141,876	395,176	219,290	456,929	302,741	429,135	298,525
Maui	211,816	35,352	209,739	107,560	250,970	175,727	232,723	183,617
Kaua'i	72,357	14,736	77,342	49,218	87,481	45,291	77,465	60,358
Kona	72,590	23,045	78,213	45,458	98,565	78,744	101,061	79,736
Hilo	4,648		3,818		4,316		2,656	3,320
Total	760,985	215,009	764,288	421,726	898,261	602,503	843,040	622,236



**Mālama Hawai'i
Campaign Update**

Mālama Hawai'i Campaign Update

- On-island to visitors and residents
 - Kuleana Health & Safety
 - 10/16 - 12/31
 - Facebook and Instagram
- Source markets
 - When It's Time
 - 11/9 - 12/20
 - Instagram, Facebook, YouTube, Pinterest
 - Advanced TV
 - Digital – West Coast Markets



Social Media – Kuleana Health & Safety Video

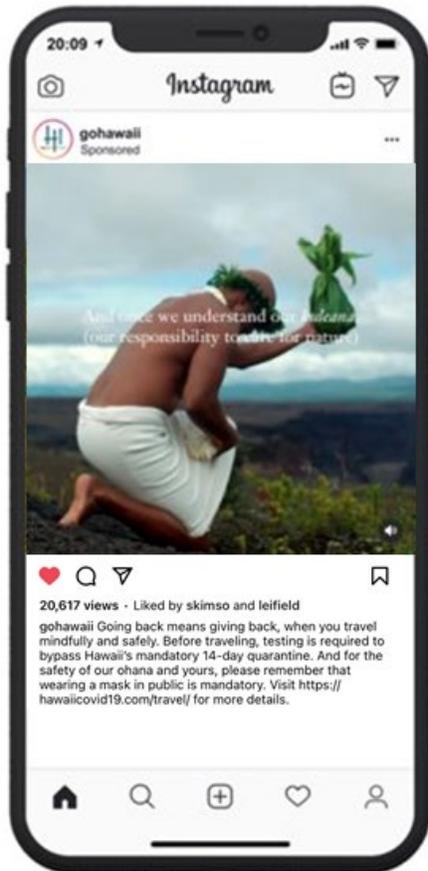
Flight Dates: 10/16 - 12/31

Channels: Facebook & Instagram

- Visitor Performance
 - Reach: 144,259
 - Impressions: 475,972
 - Engagements: 3,290
 - Percentage Watched: 33%
- Resident Performance
 - Reach: 595,483
 - Impressions: 1,240,276
 - Engagements: 1,712
 - Percentage Watched: 53%



Social Media – "When It's Time" Welcome Back Video



Flight Dates: 11/9 - 11/22

Channels: Instagram, Facebook, YouTube, Pinterest

- Generated 2.4M video views
- Facebook/Instagram largest completion rate at 80%
- Performance
 - Impressions: 3,741,134
 - Facebook/Instagram Reach: 558,820
 - Pinterest Reach: 581,570
 - Engagements: 14,030
 - Percentage Watched: 65%

Mālama Hawai‘i

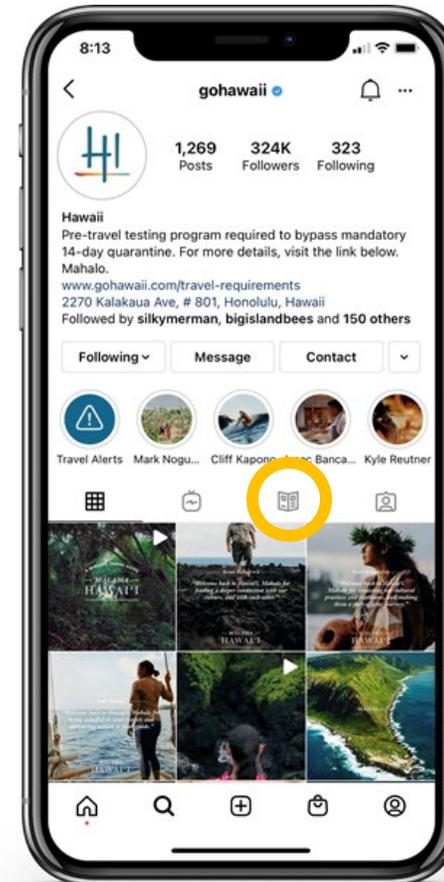
An invitation to return using our Hawai‘i Rooted Ambassadors



Mindful Travel Guide

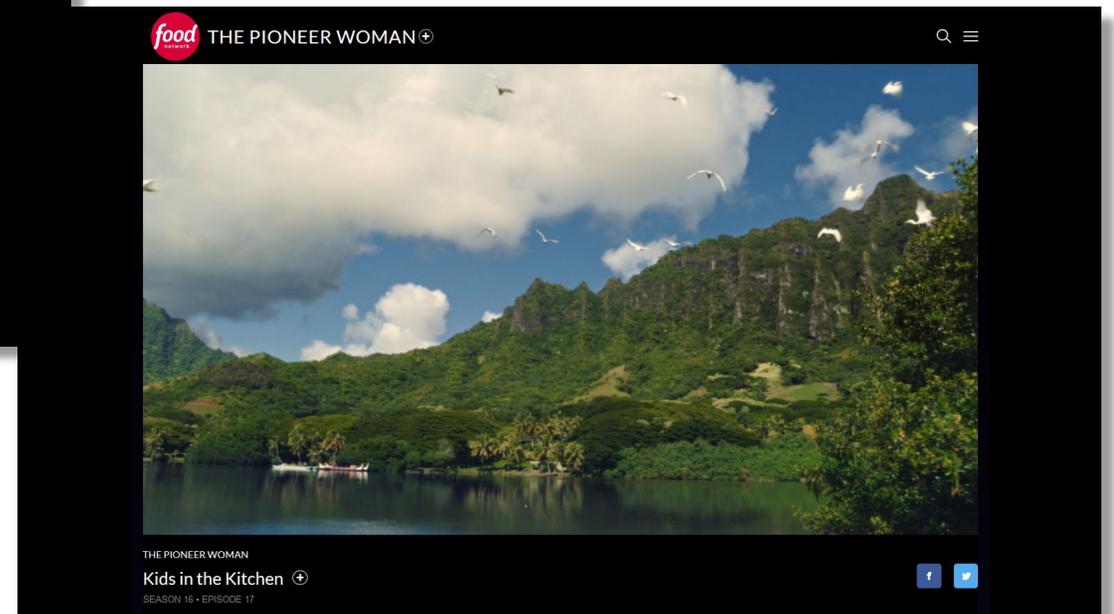
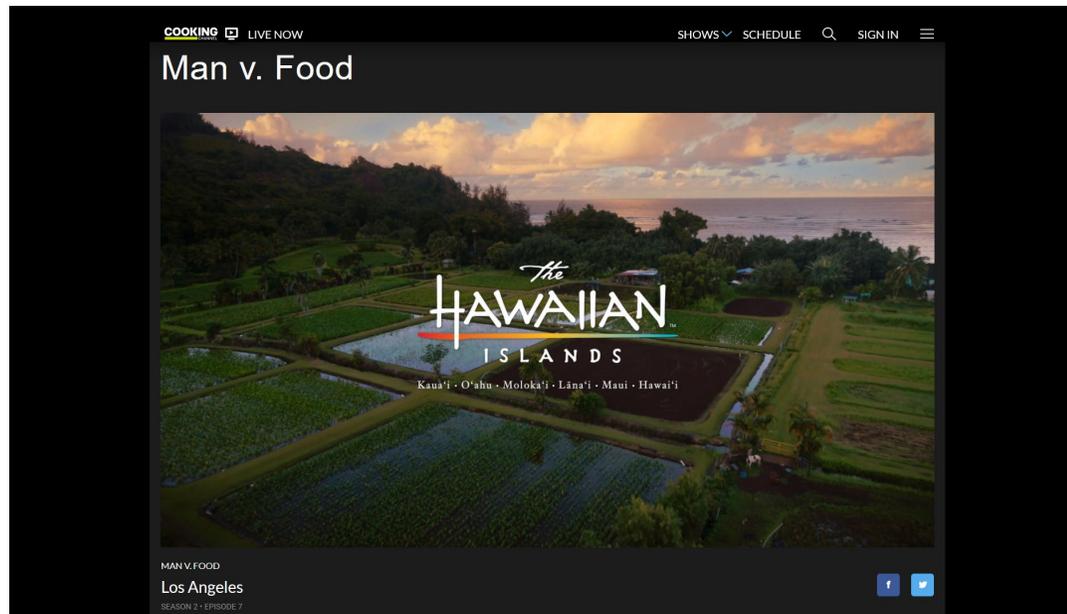
Organic In-Feed & Story

How to get there



OTT Video

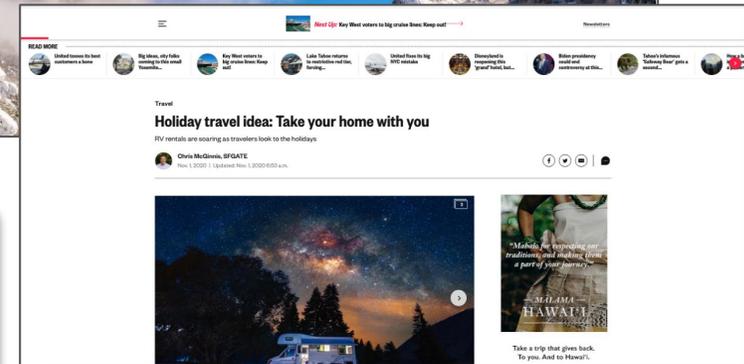
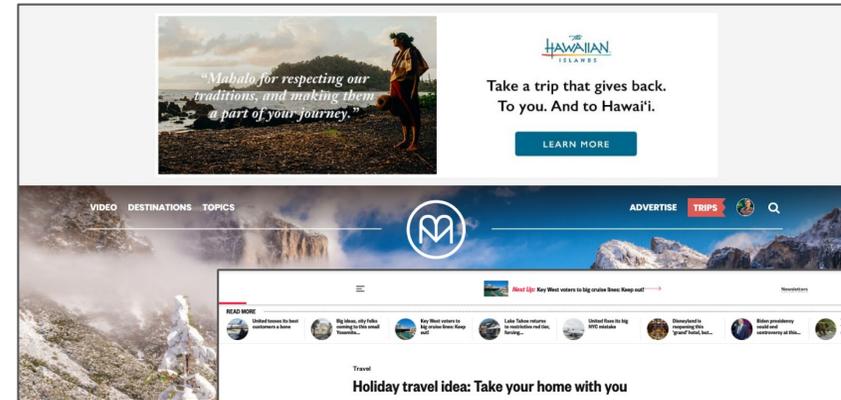
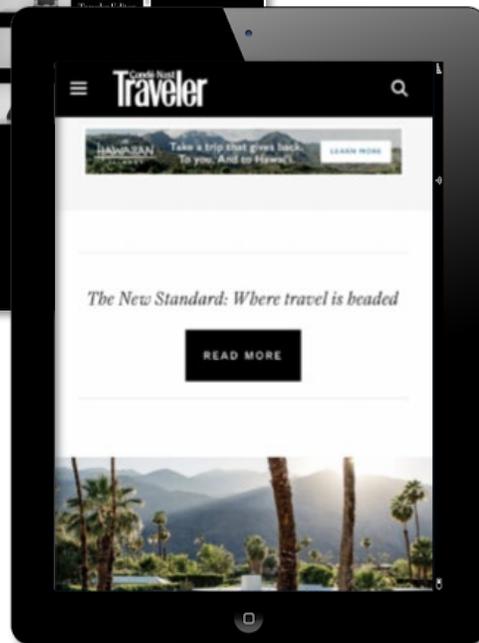
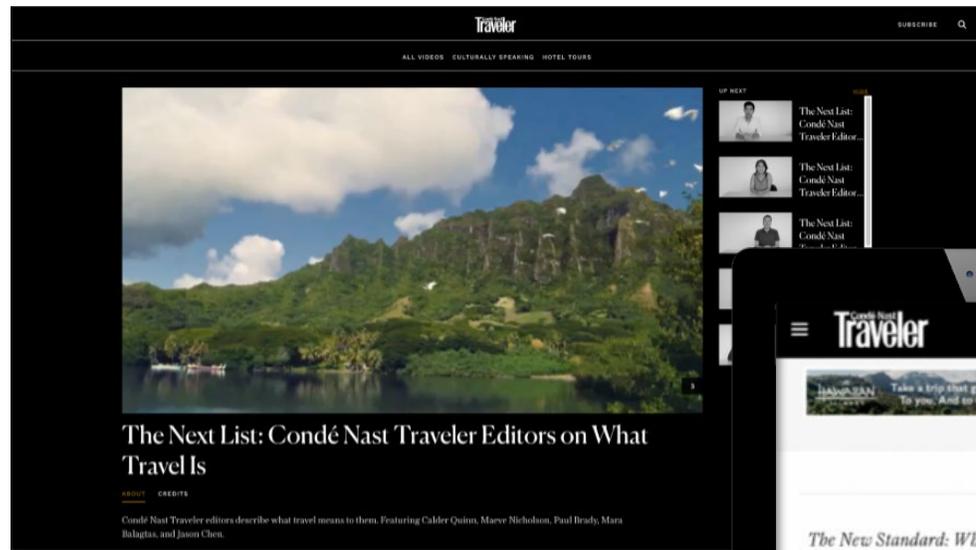
Flight Dates: 11/9/20 – 12/20/20



Digital Campaign

Flight Dates: 11/9/20 – 12/20/20

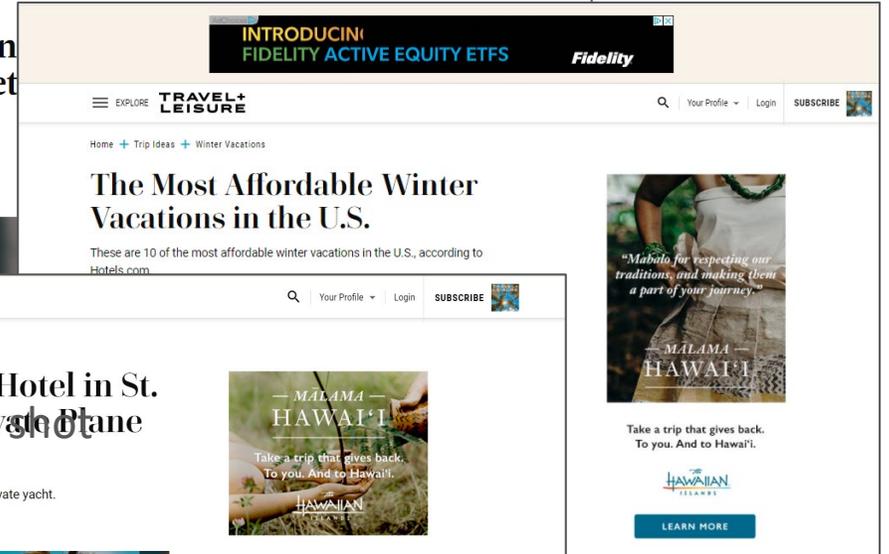
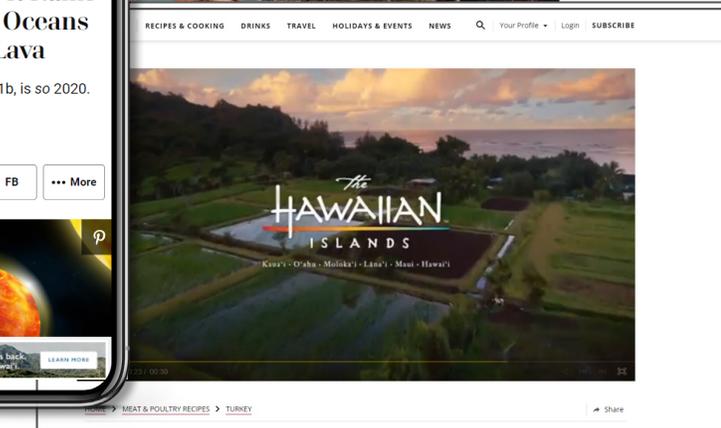
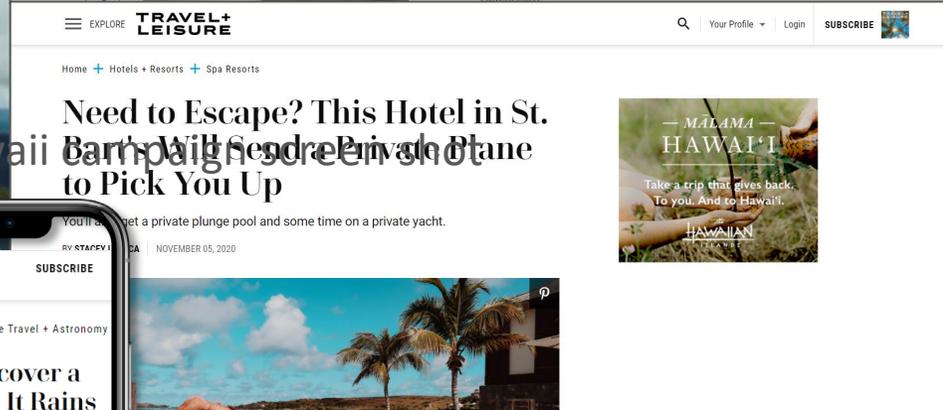
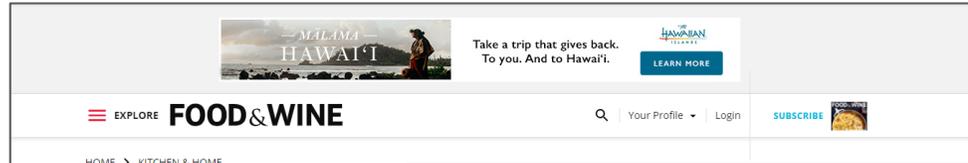
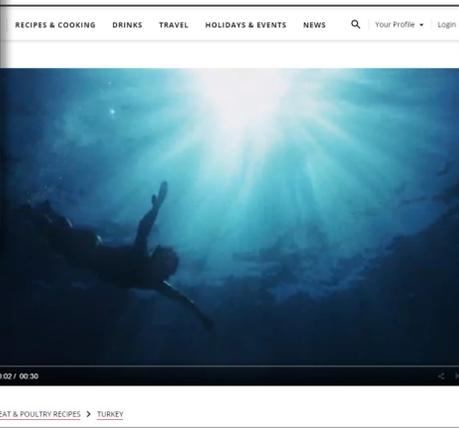
- Conde Nast Traveler
- Matador
- YouTube



Digital Campaign

Flight Dates: 11/9/20 – 12/20/20

- Food & Wine
- Travel & Leisure
- Variety



Digital Campaign

Flight Dates: 11/9/20 – 12/20/20

- LA Weekly
- LAist
- Los Angeles Times
- 7x7 (Seattle)
- Seattle Times
- SF Gate



LAist

HOW TO (NEW) LA A Series Of Practical Guides For Navigating Life In Los Angeles

JEOPARDY!

MĀLAMA HAWAII Take a trip that gives back. To you. And to Hawai'i.

Los Angeles Times

'Hoaxes and nonsense': GOP election officials in Georgia reject Trump's unfounded fraud claims

7x7

HOLIDAY RECIPES GETAWAYS EAT + DRINK WORKOUTS + WELLNESS CULTURE LOCALS WE LOVE ...

MĀLAMA HAWAII Take a trip that gives back. To you. And to Hawai'i.

8 ways Hawaii is ideal for healthy living and social distancing

By Sunny Fitzgerald Nov 18, 2020

LA WEEKLY

MĀLAMA HAWAII Take a trip that gives back. To you. And to Hawai'i.

NEWS FOOD MUSIC ENTERTAINMENT ARTS CULTURE PODCAST CANNABIS CBD CALENDAR

hawaiicovid19.com/travel

7x7

Location: Sonoma, CA

Bedrooms: 4 (sleeps 8)

Price: \$983 per night (approx)

You could easily ride your bike from this hideout to Sonoma Square, but you may have a hard time tearing yourself away from the infinity pool with vineyard panoramas. This four-bedroom stay is the epitome of lavish, Wine Country living with an open floor plan and guest house deal for entertaining thanks to endless patios, dining spots, and a retractable living room for indoor-outdoor living. The five-acre property doubles

The Seattle Times

Business

MĀLAMA HAWAII Take a trip that gives back. To you. And to Hawai'i.

The Seattle Times

Entertainment

MĀLAMA HAWAII Take a trip that gives back. To you. And to Hawai'i.

Enjoy

SFGATE

News Sports Local Culture Food Tahoe

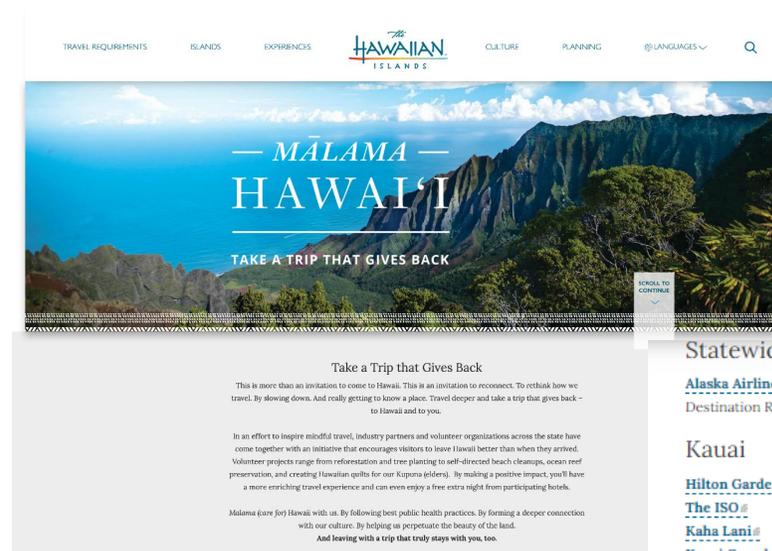


Mālama Hawai'i Program Update



Mālama Hawai'i Partners

- 68 hotel properties... and counting
 - Listed on gohawaii.com/malama
- Many offers valid through Q4 2021
- Volunteer programs include:
 - Hawaiian Legacy Reforestation Initiative
 - Pacific Whale Foundation
 - Sustainable Coastlines



Statewide

[Alaska Airlines](#)
[Destination Residences Hawaii](#)

Kauai

[Hilton Garden Inn Kauai at Wailua Bay](#)
[The ISO](#)
[Kaha Lani](#)
[Kauai Grand Hyatt Kauai Resort & Spa](#)
[Kauai Kailani](#)
[Kauai Koloa Landing Resort at Poipu, Autograph Collection](#)
[Kauai's Marriott Resort](#)
[Kiahuna Plantation & the Beach Bungalows](#)
[Makaheuna](#)
[Poipu Shores](#)
[Sheraton Kauai Resort](#)

Oahu

[Alohilani Resort Beach Waikiki](#)
[Bamboo Waikiki Hotel](#)
[Courtyard Marriott Oahu North Shore](#)
[Embassy Suites by Hilton Oahu Kapolei](#)
[Embassy Suites by Hilton Waikiki](#)
[Hyatt Regency Waikiki Resort Spa](#)
[The Imperial Hawaii Resort](#)
[The Laylow, Autograph Collection](#)
[Moana Surfrider, A Westin Resort & Spa](#)
[Outrigger Waikiki Beach Resort](#)
[Prince Waikiki](#)
[Residence Inn by Marriott Oahu Kapolei](#)
[The Ritz-Carlton Residences, Waikiki Beach](#)
[The Royal Hawaiian](#)
[Sheraton Princess Kaiulani](#)
[Sheraton Waikiki](#)
[Waikiki Beach Marriott Resort & Spa](#)
[Waikiki Beachcomber by Outrigger](#)
[Waikiki Grand](#)
[Waikiki Shore](#)

Maui

[Andaz Maui at Wailea Resort](#)
[Chase 'N Rainbows](#)
[Courtyard Maui Kahului Airport](#)
[Fairmont Kea Lani](#)
[Four Seasons Resort Maui at Wailea](#)
[Hana Maui Resort](#)
[Hyatt Regency Maui Resort & Spa](#)
[Kamaole Sands](#)
[Paki Maui](#)
[Residence Inn Maui Wailea](#)
[The Ritz-Carlton, Kapalua](#)
[Sheraton Maui Resort & Spa](#)
[Wailea Beach Resort](#)
[The Westin Maui Resort & Spa, Kaanapali](#)

Island of Hawaii

[Courtyard King Kamehameha's Kona Beach Hotel](#)
[Fairmont Orchid, Hawaii](#)
[Hali Kai](#)
[Hilo Hawaiian Hotel](#)
[Kanaloa at Kona](#)
[Kona Reef](#)
[Mauna Kea Beach Hotel, Autograph Collection](#)
[Sheraton Kona Resort & Spa at Keauhou Bay](#)
[Waikoloa Beach Marriott Resort & Spa](#)
[Waimea Country Lodge](#)
[The Westin Hapuna Beach Resort](#)

Volunteer Opportunities

[Hawaiian Legacy Reforestation Initiative](#)
[Pacific Whale Foundation](#)
[Travel2Change](#)

Book Your ROOMS

Arrival
12/07/2020

Departure
12/09/2020

Number of Rooms
1

Number of People
1

BOOK NOW

Modify Your Reservation

MĀLAMA HAWAI‘I

TAKE A TRIP THAT GIVES BACK

Malama Hawai‘i Package

In partnership with the Hawaii Tourism Authority and the Hawaii Visitors and Convention Bureau, Prince Waikiki has joined the Malama Hawaii campaign. In an effort to inspire mindful travel, the [Malama Hawaii](#) initiative not only helps to protect and preserve Hawaii for the future, but also gives visitors a unique opportunity to give back to the local community. The Prince Waikiki continues to support the sustainable movement in Hawaii and particularly in efforts to maintain a healthy harbor, ocean and coastline given the hotel's historic location where native Hawaiian flora, fauna and marine life once flourished in it's estuary. In partnership with the Sustainable Coastlines of Hawaii, with the Prince Waikiki's Malama Package guests will have the opportunity to participate in the Sustainable Coastlines Hawaii DIY Cleanup Program and in return receive the following exclusive benefits:

- Every 4th Night Free
- Waived Resort Charge
- Daily Self Parking
- Commemorative Sustainable Gift
- Press Reader with access to over 7,000 Digital Publications
- 15% off In Room Dining
- 10% off at Abiste
- 10% off select services at Naio Bliss
- 20% off at Hawaii Prince Golf Club
- Local/Toll Free calls

Terms & Conditions:

A minimum of 4 night stay required. Book from November 16, 2020 – December 16, 2021 for travel between November 16, 2020 – December 21, 2021. One night deposit required at time of booking, not valid or combinable with any other offers, discounts, promotions or negotiated rates. Promotion is subject to availability and rates will fluctuate. Cancellations must be made 24 hours in advance to avoid penalties. Room rates are based on single or double occupancy and subject to taxes. Checkout dates and restrictions may apply. Sustainable Coastlines Hawaii DIY Cleanup kit to be returned to hotel upon completion of coastal cleanup.

BOOK NOW



Sustainable Coastlines Hawaii is a grassroots, local nonprofit organization run by a small team of dedicated staff and supported by passionate volunteers inspiring local communities to care for their coastlines through fun, hands-on beach cleanups. Sustainable Coastlines Hawaii also coordinates educational programs, team building corporate cleanups, waste diversion services, public awareness campaigns and help others run their own beach cleanups.

LEARN MORE

Take a Trip that Gives Back

An invitation to restore, rebuild and help us come back stronger than ever. We invite you to take a vacation that gives back. Explore opportunities to malama (care for) Hawaii with us and earn your 5th night free.

DESTINATION: DATES: — PROMO CODE: [Terms & Conditions](#)

Malama Hawaii

To continue inspiring mindful travel, we have partnered with the Hawaii Visitors and Convention Bureau (HVCB) and volunteer organizations across the state, encouraging visitors to leave Hawaii better than when they arrived. Volunteer projects range from reforestation and tree planting to self-directed beach cleanups and creating Hawaiian quilts for our [Keawe Islands](#). By making a positive contribution, guests can have a more enriching travel experience plus enjoy a free 5th night from participating hotels. **Malama** your stay Hawaii with us, by following best public health practices, forming a deeper connection with our culture, and helping us perpetuate the beauty of the land. **And leaving with a trip that truly stays with you, too.**



The Royal Hawaiian, a Luxury Collection Resort, Waikiki

Our Malama Hawaii partner is The Hawaiian Legacy Reforestation Initiative, where guests are encouraged to engage in our reforestation efforts on Oahu. Guests may choose to participate in the reforestation efforts, from sponsoring a tree to be planted, to going to Gunstock Ranch on the North Shore for an excursion and planting the tree yourself.

Book Now



Wailea Beach Resort

A Hawaiian quilt has a distinctive style only found in the Hawaiian Islands. Our Malama Quilting experience provides our guests an opportunity to create their own applique and sew it onto a bag/sand. This crafted square will be added to others and donated to provide joy and comfort to a square (padding) to those in need.

Book Now



Kauai Marriott Resort

Our guests will be able to give back by partaking in a beach cleanup at their leisure with their own family and friends traveling together. Our team will provide you with the equipment upon arrival to dedicate in your selected beach while providing a sense of pride to the local community.

Book Now



Waikoloa Beach Marriott Resort & Spa

Take care of the Waikoloa community and lead to a positive change with a group clean-up of the beach or cultural sites. Our team will provide you with the tools for scheduled activity with up to ten guests, then provide you with self-reports that you can enjoy while walking along the shore and taking in the fresh ocean breeze.

Book Now



Sheraton Maui Resort & Spa

We've partnered with the Pacific Whale Foundation for our guests to spend time on one of Maui's beaches clearing litter. You may collect the equipment at their Malama or Lahine Ocean Store, record your services on a marine debris monitoring data sheet then return the gloves to the store.

Book Now



Sheraton Waikiki

Our Malama Hawaii partner is The Hawaiian Legacy Reforestation Initiative, where guests are encouraged to engage in our reforestation efforts on Oahu. Guests may choose to participate in the reforestation efforts, from sponsoring a tree to be planted, to going to Gunstock Ranch on the North Shore for an excursion and planting the tree yourself.

Book Now



1 of 6

ARRIVE DEC 8~ DEPART DEC 9~ GUESTS 2~ [BOOK NOW](#)

UNFORGETTABLE, SOULFUL HAWAII PACKAGE

A meaningful trip for two filled with the natural beauty of Oahu. Make lifelong memories together as you journey from Waikiki to the North Shore where you'll find Gunstock Ranch and a thriving forest overlooking the Pacific Ocean. As you travel through the ranch by horseback or UTV amidst the gentle ocean breeze, you'll come upon the 'Alohilani forest to plant your very own indigenous tree. Back at the resort, enjoy dinner for two at the world-renowned, Morimoto Asia Waikiki by iron chef Masaharu Morimoto.

Your soulful journey includes:

- Stylish Ocean View or Premier Ocean Front accommodations
- Every **5th Night is complimentary**
- **One Day Luxury Car Rental** by Enterprise Rent-A-Car®. Car types include one of the following or similar, subject to availability:
 - Mustang GT (seats 4)
 - Jeep Rubicon (seats 5)
 - Range Rover Sport or Velar (seats 5)

— MĀLAMA —
HAWAI'I

TAKE A TRIP THAT GIVES BACK

- **North Shore Tree Planting experience** at Gunstock Ranch. Learn more about the 'Alohilani forest and our pledge to plant 100,000 trees.
- **\$200 resort dining credit** valid at Morimoto Asia, Momo's, or Swell Pool & Bar
- Ocean cultural blessing for two
- Valid for travel November 1 – December 23, 2021 (blackout dates may apply)

Please note: Reservations must be booked at least 14 days in advance; package is eligible only with a five consecutive night minimum length of stay, based on 2 adults per room. Additional nights may be reserved under a new reservation. Blackout dates may apply, subject to availability. Please review terms and conditions for details.

Car Requirements: The driver of the rental car must have a valid driver's license, be over 25 years old, have a major credit card under the renter's name and provide a \$200 USD deposit on the card. Car rental is based on a 24-hour period, additional charges may apply for coverage. No refunds on car portion if not utilized. Arrangements for your car rental will be automatically confirmed for the day after your arrival. Visit our concierge desk in the 'Alohilani lobby between 7am – 12pm to confirm and pick up the car. Car rental includes taxes and fees. Any additional charges, upgrades or coverage, please inquire with Enterprise.

VOTED AMONG TOP 20 RESORTS IN HAWAII BY TRAVEL + LEISURE WORLD'S BEST 2020

SHARE



[AIR INCLUSIVE PACKAGES](#)
[SIGNATURE EXPERIENCES](#)
[ALL SPECIALS](#)

[BOOK OFFER](#)



— MĀLAMA —
HAWAI'I

Enjoy a \$250 resort credit and a complimentary night on a future stay (conditions apply), when you you mālama (care for) Hawai'i.

Contact the Concierge at extension 55 to learn more about how you can help preserve Hawaii.



FOUR SEASONS
RESORT
MAUI AT WAILEA

[Facebook](#) [Instagram](#) [Twitter](#) @FSMaui | #FSMaui



— MĀLAMA —
& HAWAI‘I

Pacific Whale Foundation, in partnership with the Hawaii Tourism Authority and a statewide alliance of private industry partners, is proud to be part of a new initiative to encourage mindful and, ultimately, regenerative tourism. The Malama Hawaii program celebrates voluntourism by giving visitors an opportunity to volunteer with select organizations, like PWF, and **earn a free night stay** at participating resorts. Our [Coastal Marine Debris Monitoring Program](#) was chosen as a curated volunteer activity by four resorts to date: **Four Seasons Resort Maui at Wailea, Hyatt Regency Maui Resort & Spa, Westin Maui Resort & Spa and Sheraton Maui Resort & Spa**. While our program will continue to be available to all, guests of these resorts will have the exclusive opportunity to receive a complimentary hotel night and other perks once their data sheets have been returned to us.



— MĀLAMA —
HAWAI‘I



“Tree” Ways to get a free night stay!

THREE WAYS TO GET A FREE NIGHT STAY AT ONE OF HAWAII'S FAVORITE HOTELS

1. COME FOR THREE HOURS OF COMMUNITY SERVICE IN HELPING US PLANT OUT HAWAII'S NEWEST LEGACY FOREST
2. PLANT YOUR VERY OWN LEGACY TREE WITH YOUR DRAWN OR A TOUR AT BEAUTIFUL QUANTROCK HATCH (FEES APPLY)
3. SPONSOR YOUR VERY OWN LEGACY TREE AND SUPPORT THE FOREST REMEDIATELY (FEES APPLY)

Fill out the Malama Hawaii Application service form below to begin



— MĀLAMA —
HAWAI‘I

Malama Hawaii Application
Service Participation Form

ALOHI LANI
RESORT
WAILUA BEACH



Earned Media Coverage



TRAVEL+ LEISURE

Hawaii Visitors Can Now Score a Free Hotel Night in Exchange for Volunteer Work

Visitors can plant trees, participate in a beach cleanup, or more to participate.



Help out in Hawaii and get a free hotel stay



GIVE BACK AND STAY AN EXTRA DAY

To help preserve the islands, the Hawai'i Tourism Authority recently launched the Mālama Hawai'i (*mālama* means to "take care" of something) initiative. Hotel partners like Four Seasons Resort Maui at Wailea will offer special packages that include a volunteer opportunity on property or with a local non-profit. Most of the offers are available through 2021 and include a free extra night when participating in the designated volunteer activity.



Hawaii Is Giving Visitors a Free Hotel Night for Doing Volunteer Work

Do the right thing and Hawaii will reward you.

By **Caitlyn Hitt** Published on 11/19/2020 at 5:55 PM



SHUTTERSTOCK



"In addition to providing a financial incentive for contributing to the recovery of Hawaii's tourism-reliant economy, the program gives you the chance to get to know the islands on a deeper level—and even to leave them a little better than when you arrived."

Earned Media Coverage

Forbes

Hawaii: Hotels Will Offer You A Free Night's Stay In Exchange For This



Will McGough Contributor
Travel
I write about travel destinations and the people I meet along the way.



Taro farm in Hanalei, Kauai. Many volunteer opportunities take place on taro farms. GETTY

TRAVEL WEEKLY

Hawaii reaches out to 'mindful travelers'

By Tovin Lapan | Dec 06, 2020



tripsavvy

"Basically, if you're planning to travel to Hawaii right now, do so responsibly. Oh, and keep that same energy when you land."



"Nothing makes me feel more like a local than finding a way to help, and the Hawaii Tourism Authority is making that easy."



What to expect traveling Hawaii during the pandemic





Earned Media Coverage

Hawaii tourism encourages visitors to Malama Hawaii



Editorial: Bringing tourists back

Tourism is our big economic engine, and we need to keep it purring. But we can fine-tune it before we restart it.

The Hawaii Visitors and Convention Bureau (HVCB) and the Hawaii Tourism Authority (HTA) recently announced some encouraging steps in that direction. Mainly it involves messaging: informing tourists about the state's requirements for masks, physical distancing and hygiene, like washing hands frequently.

Also, the Malama Hawaii program will offer tourists a free night's stay if they volunteer for projects that enhance the state's natural beauty and culture.



A new incentive hopes to lure more visitors to stay in hotels while caring for the islands

Malama Hawaii is a program created by the Hawaii Tourism Authority in partnership with more than 30 hotels statewide.

Tuesday, November 24th 2020, 5:49 PM HST by Nicole Tam





2021 Plan

2021 Residents

- Continue to stay in touch with resident's position on tourism
- Work with HTA Team to gain insight from their community study



2021 Target Audience

- The Avid Explorer – mindful, responsible, respectful
- Continue to improve our knowledge on how to effectively invite Avid Explorer's to Mālama Hawai'i



2021 Industry Coordination

- Repeaters vs. First Timers
(HVCB/airlines/hotels)
- National vs. Key feeder markets
(HVCB/airlines/hotels)



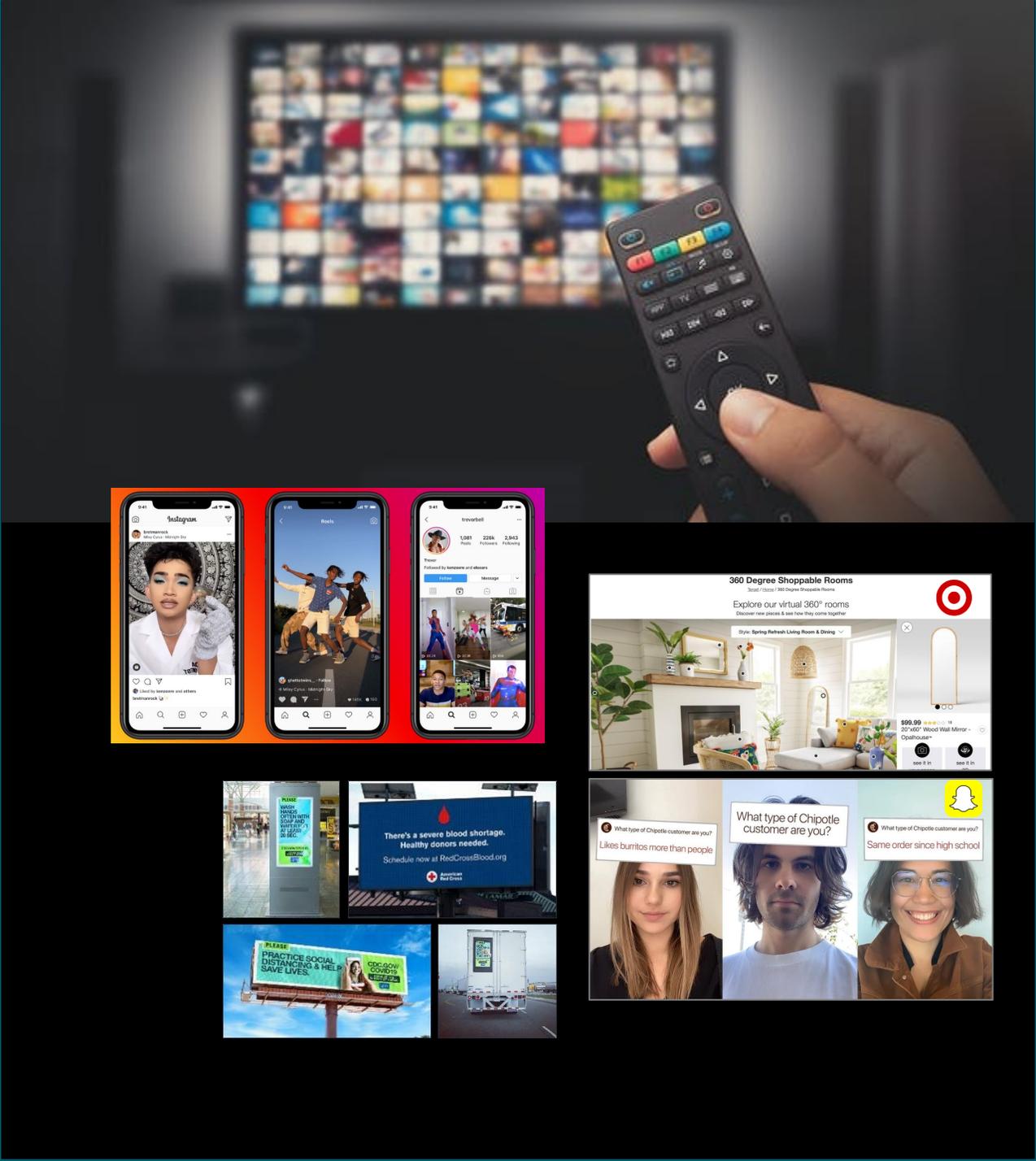
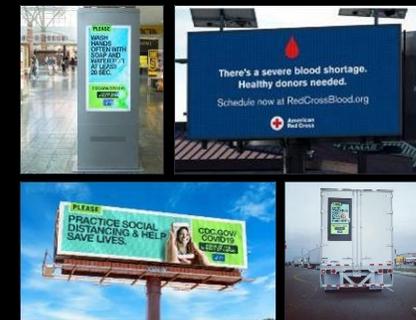
2021 Creative Messaging

- Evolution of Hawai'i Rooted, Mālama Hawai'i
- Share stories of Hawai'i ambassadors who are connected with community and/or volunteer organizations



Media Landscape

- Media consumption during COVID
- How will it evolve post-pandemic
 - vaccine is dispersed
 - people go back to the office (or not)
 - kids go back to school
 - social gatherings start to take place
 - travel resumes
 - how will travel motivators evolve?
- Channels
 - Video
 - Streaming
 - Digital
 - Audio
 - Out-of-Home

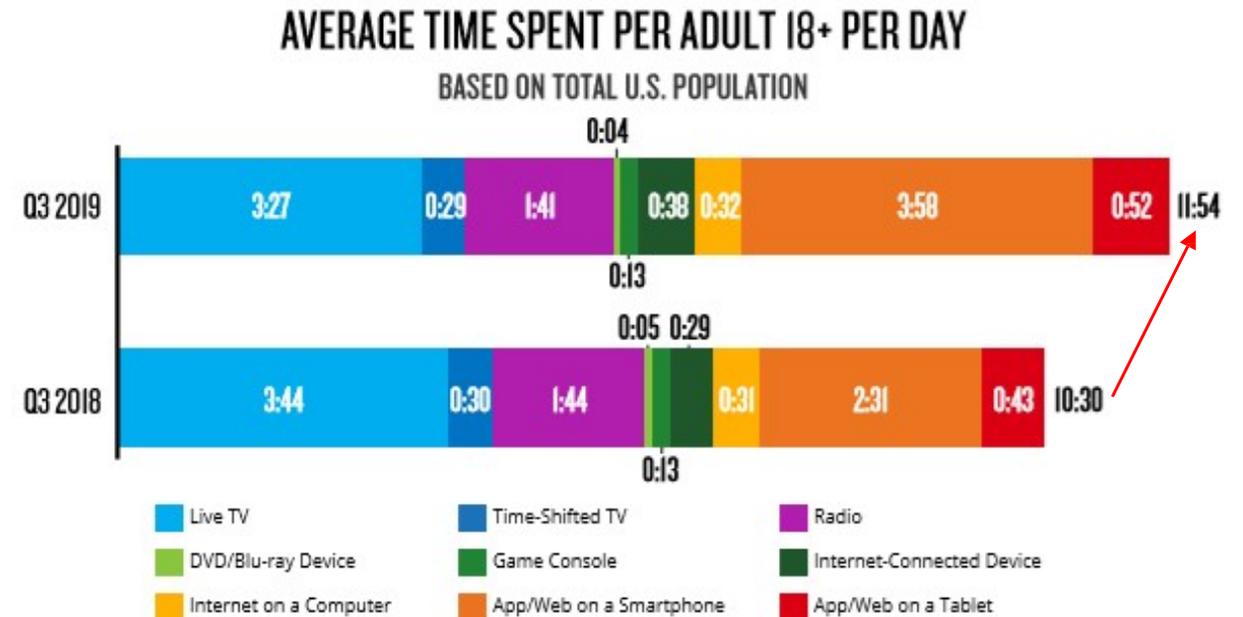




Video

Adults spend half their day connected to media

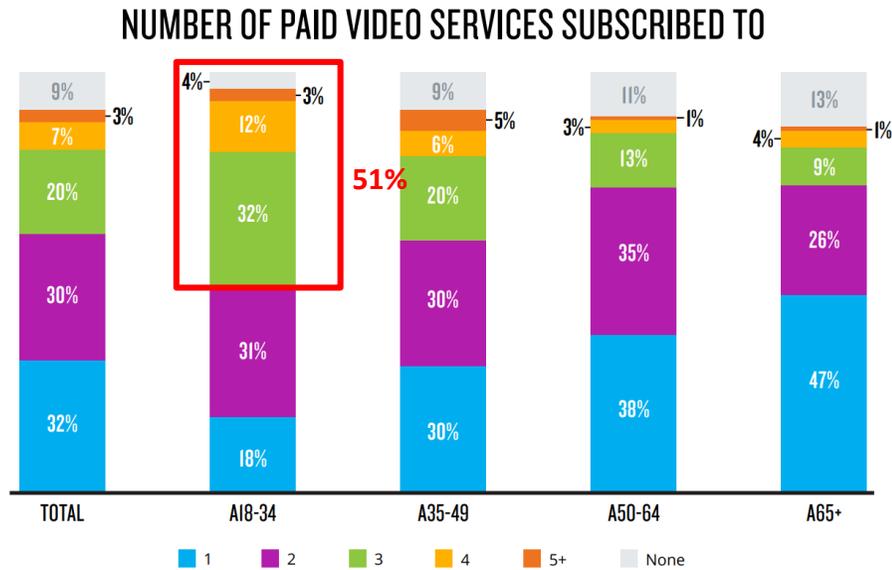
- Consumers spend nearly 12 hours a day across TV, CTV, Radio, Computers, Smartphones and tablets
- Increase mostly driven by smartphone usage (+55%)



Note: Some amount of simultaneous usage may occur across devices. Internet Connected Device is inclusive of Smart TV app usage. Measurement enhancements to the mobile panel in the past year contributed to increases in usage levels beyond pure organic growth.

Source: Nielsen February 2020 Total Audience Report

The fight for the connected consumer



FUTURE ACTION OF PAID VIDEO STREAMING SUBSCRIBERS

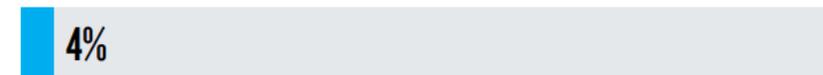
Increase or no change



Decrease (*Downgrade, remove services or use less*)



Not sure



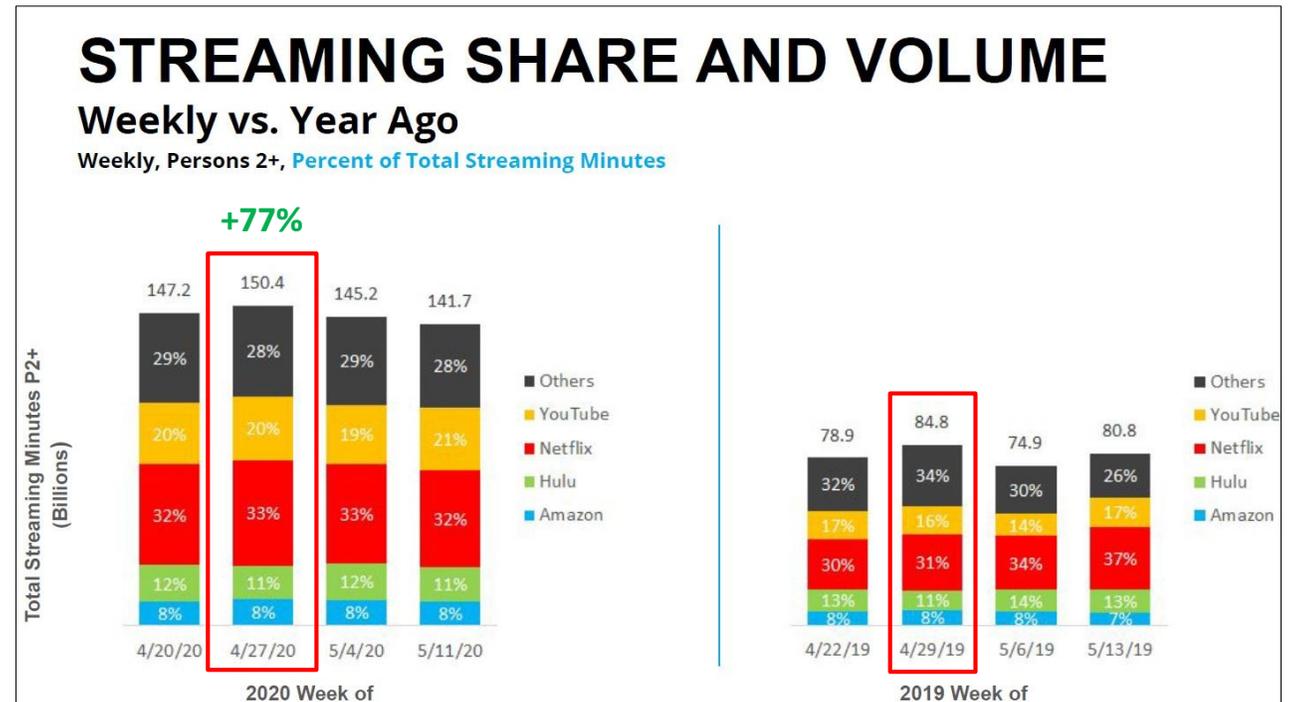
- Half of A18-34 (51%) said they currently are subscribed to three or more paid streaming services
- With no sign of stopping, 93% of video subscribers plan on an increase or no change to their streaming habits



Streamers

Streaming dominates time spent during COVID-19

- On average, time spent streaming content increased by 82% compared to a year ago
- While Netflix continued to lead, YouTube saw the greatest spike in usage



A hand in a light blue sleeve holds a glowing white sphere. The sphere is surrounded by a circular network of icons including a location pin, a person, a laptop, a shopping cart, an envelope, a play button, a smartphone, a gear, and a magnifying glass. The background is dark blue with various digital elements: a bar chart, a line graph, a globe, and a grid of icons. A bright blue light beam emanates from the sphere.

Digital

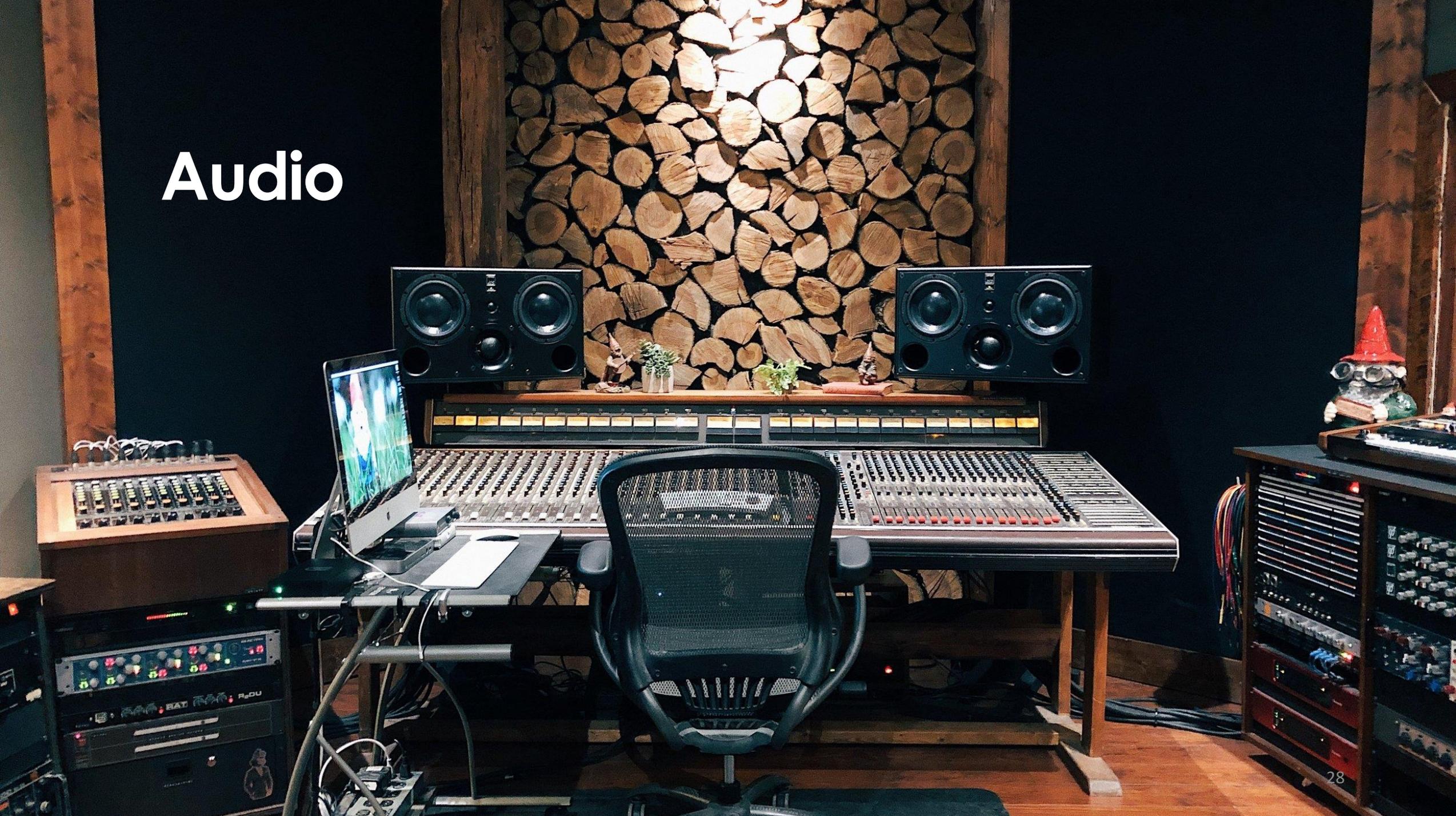
Digital ad spending in the U.S. exceeds traditional ad spending

- In 2019, digital advertising spend surpasses TV for the first time and is projected to continue YOY
- Mobile continues its dominance and accounts for more than two-thirds of digital ad spend

U.S. Total Media Ad Spending, by Media, 2019-2023 (U.S. dollar billions)

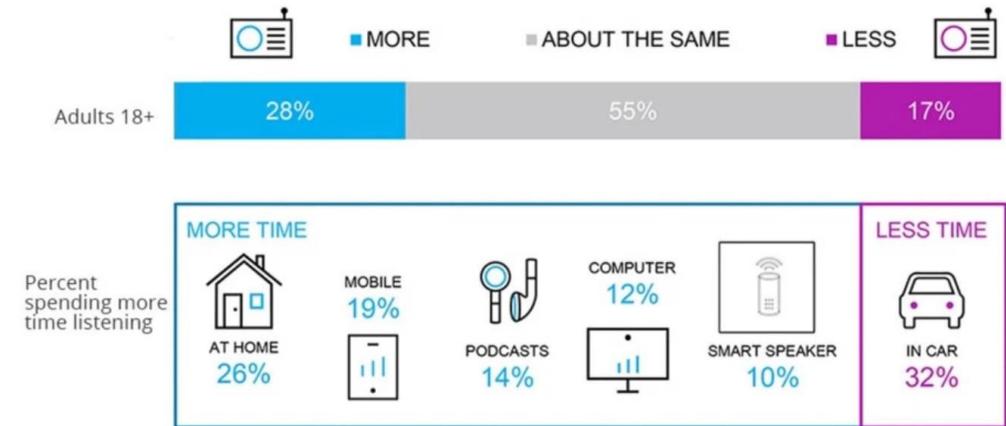
Timeframe	2019	2020	2021	2022	2023
Digital	\$132.46	\$154.58	\$177.64	\$198.34	\$215.25
– Mobile	\$87.30	\$105.34	\$123.59	\$140.72	\$155.26
TV*	\$70.59	\$72.00	\$71.28	\$70.57	\$69.86
Print	\$15.41	\$12.92	\$11.02	\$9.63	\$8.86
– Newspaper*	\$7.96	\$6.44	\$5.29	\$4.44	\$4.08
– Magazine*	\$7.45	\$6.48	\$5.74	\$5.19	\$4.78
Radio**	\$13.90	\$13.76	\$13.63	\$13.49	\$13.35
Out-of-home	\$8.59	\$8.87	\$8.96	\$9.05	\$9.14
Directories*	\$1.19	\$0.99	\$0.84	\$0.74	\$0.66
Total	\$242.13	\$263.11	\$283.36	\$301.81	\$317.13

Audio



Radio holding strong during COVID-19

- Despite less time commuting, people are reporting more time spent with radio, possibly due to the “comfort food-like” medium
- A recent Ad age article stated that 2 in 5 consumers said they are listening to music to help manage stress
- Spotify added 15MM new monthly active listeners in Q1 2020



Source: Nielsen

Out-of-Home



Out-of-Home (OOH) in light of COVID-19

- The COVID-19 pandemic has impacted consumer traffic and movement patterns in every state, not uniformly or simultaneously
- Digital OOH continues to be a key driver of increased OOH spend as digital proliferation within U.S. markets continues



Post COVID-19 Outlook

Consumers are quick to adapt to new technology and their behaviors in consuming media. Some new behaviors may continue to prevail post pandemic:

- Streaming will likely see an increase in usage, as well as the number of streams viewers subscribe to
- Escapism will still be an underlying theme moving forward trying to cope in a post-pandemic world. People will be eager to get out of their homes and experience other locations in a vaccinated world.
- We expect other Movie Studios will follow WarnerMedia's surprise move of launching new theatrical releases on their streaming app, on the same day they are released in theatres
- Traditional TV viewership will likely continue its trend of declining ratings year-over-year
- Print media will also likely continue to decline, causing many publishers to shutter their titles

PGA Tour Player Vignettes



Video

Video

Video



Mahalo

Agenda Item #8:

Presentation and discussion of the general Japanese market updates and trends of which could include the leisure and group segments

~Japan Market Updates~

December 16, 2020

Eric Takahata | Managing Director

Japan Market Current Situation

Japan's COVID-19 Cases (as of 12/11)

Population

United States	Japan	Hawai'i	Tokyo
330.14 million	125.9 million	1.41 million	14 million

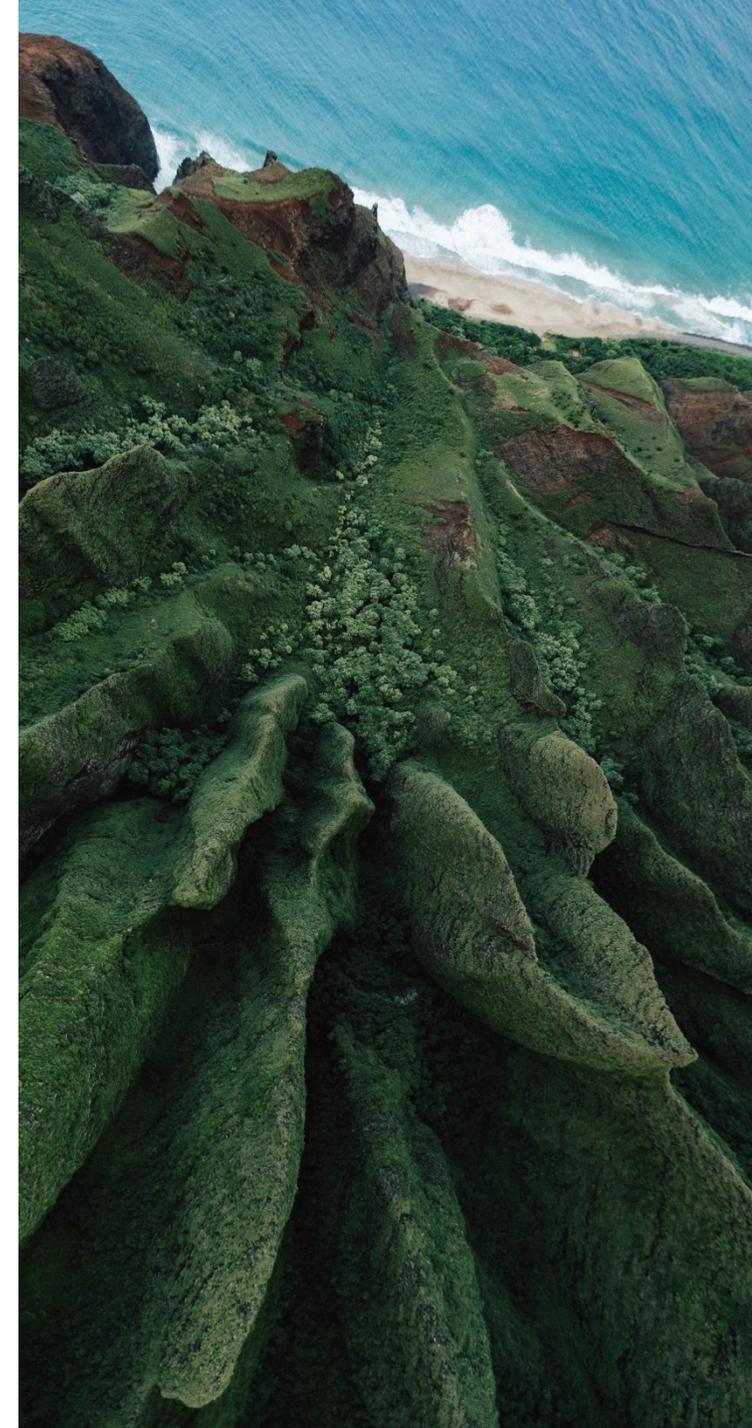
Cases of COVID-19 in the US, Hawai'i and Japan

	U.S.	Hawai'i	Japan
Total Cases	15,474,800	18,864	171,160
Recovered	NA	NA	143,491
Deaths	291,522	268	2,501

Comparison of cases in Hawai'i and Japan per capita (100,000)

	Hawai'i	Japan
Confirmed Cases	1,335	136

Source: <https://web.sapmed.ac.jp/canmol/coronavirus/japan.html?y=1&d=0>





Japanese Political & Economic Situation



Japan Cabinet OKs 73.6 tril. yen (\$707 billion) new stimulus to fight virus



Japan to extend coronavirus furlough (employment) subsidy until end of February



Japan's GDP growth in July-Sept. upgraded to annualized 22.9%



The 3rd Supplementary budget stimulus measures will boost Japan's real GDP by 3.6 percent



Go To Travel Campaign

- Temporary suspension for city of Osaka and Sapporo for 3 weeks until 12/15
- Request self-restraint traveling to individual 65 years and older to prevent the infection.
- A six-month extension (until June 2021) of the Go to Travel campaign as part of an economic stimulus package with an overall value of ¥73.6 trillion.



Japan's Reopening

- **Business Track update:** Vietnam (11/1) & China (11/30) started in November
 - Singapore (9/18~) & Korea (10/8~)
- **Lifted Level 3 advisories** against all travel to nine nations and jurisdictions including China, South Korea, Vietnam and Australia.
- **JATA and ANTA's suggestion** of "Restricted Business Track (Managed Travel)" to restart outbound travels

Japan Consumer Sentiment

Consumer Behavior COVID19

Wear Mask when
go outside



90.7%

Use disinfectant



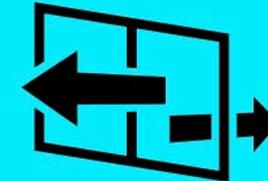
72.8%

Wash Hands &
Gargle



79.1%

Frequent
Ventilation



62.3%

Avoid Crowds



75.8%

Not Participating
Drinking Party



55.6%

Consumer Consciousness

Should travel or dine out
if small group



35.7%

1 out of every 3

Participation of
Go To Travel



27.2%

1 out of every 4

Participation of
Go To Eat

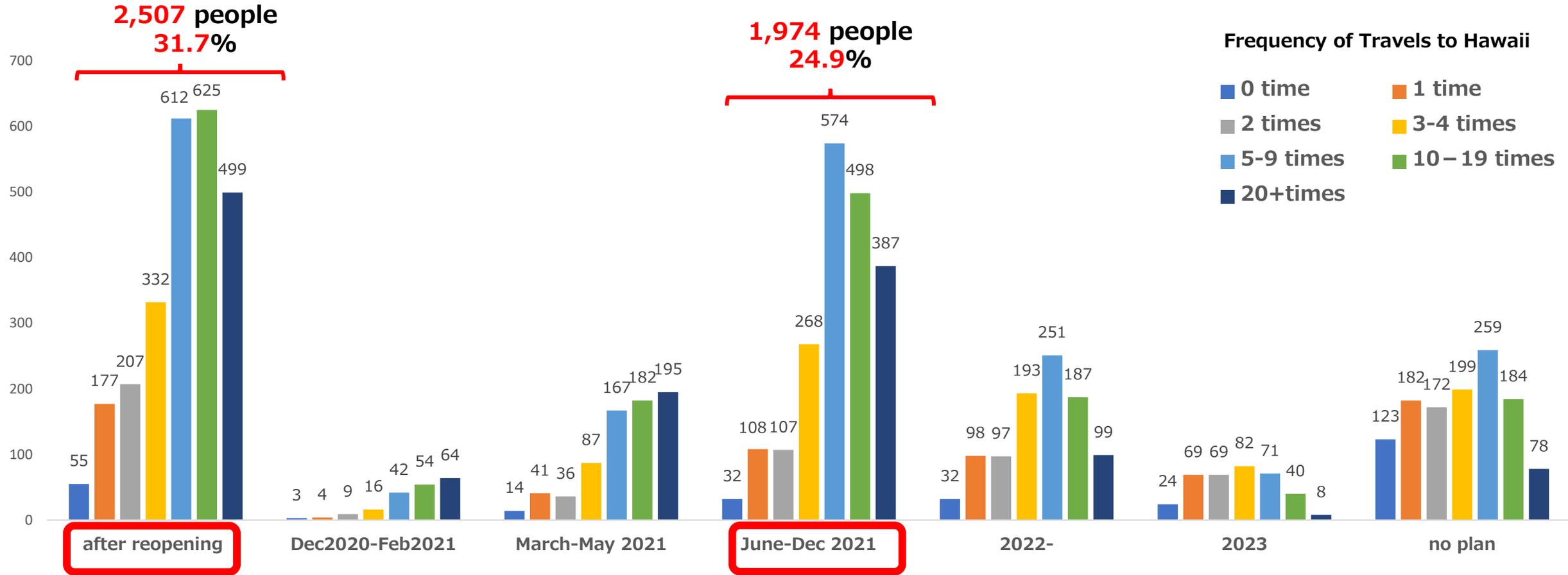


21.6%

1 out of every 5

Consumer Sentiment for Travel to Hawaii

WHEN DO YOU PLAN TO VISIT HAWAII NEXT TIME?



Oct 30-Nov 30,2020
N=7,912

31.7% want to travel to Hawaii after reopening, visiting Hawaii between June to December 2021 is also highest ratio.

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

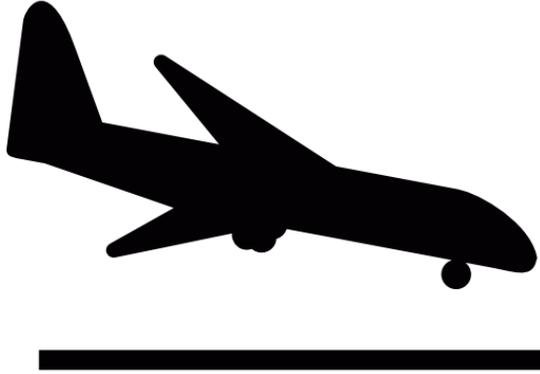
Japan Travel Industry Current COVID-19 Situation

Travel Industry Update



- **Wholesaler business reformation:** Major wholesalers announced their business reformation for next 5 years. This business reformation may increase depended on the prolong COVID19.
- **ZIPAIR's inaugural flight** from Narita starting on 12/19 (total 13 round-trip flights)
- **↑ Airline operation for Hawaii routes** in December & January
- **Suspension:** Other carriers like DL, KE and UA have not announced resumption and may be extending the suspension until summer.

August - November Flights



	Passenger Counts			
	Flight	by DBEDT	Air seats	LF
August	4	580	744	78.0%
September	2	193	372	51.9%
October	9	560	2,254	24.8%
November	10	1,006	2,532	39.7%
TTL/AVE	25	2,339	5,902	48.6%

December & January Flights



2020 December

Op Airline Name	Origin Code	Total Flights	Seats
All Nippon Airway	HND	2	492
All Nippon Airway	HND	6	1,290
Hawaiian Airlines	NRT	13	3,614
Hawaiian Airlines	KIX	5	1,390
Hawaiian Airlines	HND	4	1,112
Japan Airlines	HND	7	1,302
Japan Airlines	NRT	7	1,393
ZIPAIR Tokyo	NRT	6	1,740
Total		50	12,333

2020 January

Op Airline Name	Origin Code	Total Flights	Seats
All Nippon Airway	HND	2	492
All Nippon Airway	HND	7	1,505
Hawaiian Airlines	NRT	17	4,726
Hawaiian Airlines	KIX	13	3,614
Hawaiian Airlines	HND	14	3,892
Japan Airlines	HND	7	1,302
ZIPAIR Tokyo	NRT	7	2,030
Total		67	17,561



Japan Safe Travels update

Resumption of Travel

ハワイ州 新型コロナウイルス情報サイト *allhawaii*

HAWAII TOURISM JAPAN

COVID-19 情報サイト

▶ 最新情報 ▶ コラム ▶ FAQ

現在の感染状況 | 旅行前の準備 | 旅行中の対応 | 旅行のプロセス | 安全ガイドライン



Unchanged
A L O H A

ハワイの新型コロナウイルス感染症の安全・衛生対策

▶

最新情報
WHAT'S NEW

Date of Issue
2020/11/30
Serial ID HI-01 202011-XXXXXX

State of Hawai'i Certificate of Testing for COVID-19

【米国ハワイ州渡航用 新型コロナウイルスに関する検査証明書】

Name
氏名
Last Name (姓) First Name (名) Middle Name (ミドルネーム)

Nationality
国籍

Date of Birth
生年月日

Passport No.
パスポート番号

Address
住所

Date and time of departure
出発日時

This form certifies the following result,
confirmed through a negative RT-PCR test for COVID-19
conducted on samples taken from the aforementioned individual.
上記の者に対して、新型コロナウイルスに関する抗原検出検査にて結果が陰性だったことを証明し、ここに交付する。

Sample 採取部位	Date and time 日時	Remarks 備考
<input type="checkbox"/> Nasopharyngeal swab 鼻咽喉ぬぐい液	Sample collected 検体採取日時	
<input type="checkbox"/> Saliva 唾液	Result determined 結果判定日時	

Institution
医療機関名

Physician
医師名

Address
住所

Signature
署名

Date
日付

※裏面記入は英語(ローマ字)必須

UU: 73,237

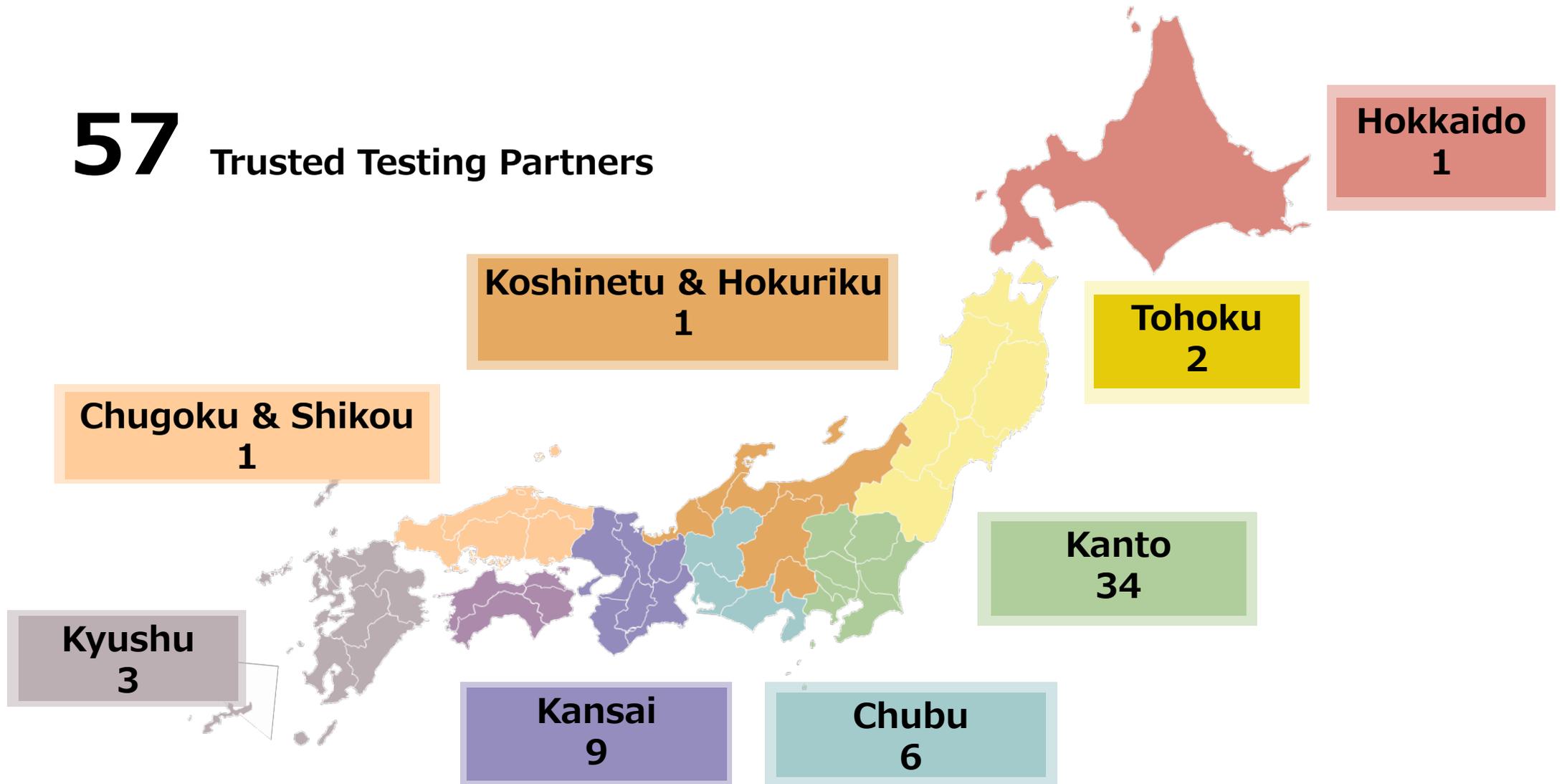
PV: 231,366

(11/1- 11/30, 2020)

Japan Trusted Testing Partners

(as of December 15)

57 Trusted Testing Partners



Airlines Partners' Safe Travels Support



ハワイへの入島条件・日本への入国制限

検疫体制の強化に伴い、入国・入島条件の変更など、さまざまな対応が実施されています。ご利用のお客様は、渡航先の大使館・領事館および保健機関関連情報などをご確認、ご帰国時の日本への入国制限をご確認ください。

渡航先の関連情報

帰国時の関連情報

各地域への入国条件変更
(ハワイへ渡航のお客様へ)

日本への入国制限

ハワイ州 新型コロナウイルス情報サイト

ハワイへ渡航のお客様へ

渡航する24時間前までにセーフ・トラベルズ・アプリケーション (Safe Travels Application) への事前登録が必要となります。すべての登録完了後にQRコードをダウンロードまたは印刷し、出発時にはご持参ください。出発時にご登録が必要となります。

Safe Travels Application について

入力手順1 (アカウント作成 等)

入力手順2 (健康状態)

2020年11月より事前検査プログラムが開始され、日本を出発する72時間以内にハワイ州保健局が指定する日本国内の医療機関で、厚生労働省により承認されているPCR検査を含む複数増幅検査を行い、ハワイ州保健局が指定する陽性証明書 (英語) を提示すれば、ハワイでの14日間の自己隔離が免除されます。詳細はハワイ州観光局 COVID-19情報サイトをご確認ください。

ハワイ州観光局 COVID-19情報サイト

PCR検査を含む複数増幅検査について

ご到着時には、ゲートにて自動検温システムによる検温が行われております。(小さなお子様については別途スタッフによる検温) 上記陽性証明書が提示できない場合、ご到着後の14日間の自己隔離が必要となります。

これに違反すると罰金刑や禁固刑が科せられます。

ご到着後、自主隔離中の連絡先としての携帯電話 (または現地連絡先) の提示も必要となりますので、携帯電話は十分に充電をされた状態でご持参ください。

詳細または最新の情報については、ハワイ州ホームページをご覧ください。



ハワイへの入島条件・日本への入国制限

現在、ハワイでは入島制限が継続されており、到着後14日間の自己隔離が必要となります。ただし、2020年11月より事前検査プログラムが開始され、日本を出発する72時間以内にハワイ州保健局が指定する日本国内の医療機関で、厚生労働省により承認されているPCR検査を含む複数増幅検査を行い、ハワイ州保健局が指定する陽性証明書 (英語) を提示すれば、自己隔離が免除されます。ご利用のお客様は、渡航先の大使館・領事館および保健機関関連情報などをご確認、ご帰国時の日本への入国制限をご確認ください。

各国の入国制限や検疫体制などの対応 (日本からハワイへ渡航のお客様)

ハワイ州政府観光局ホームページ (新型コロナウイルス情報サイト)

日本への入国制限

また、渡航にあたっては事前に以下の各チャートをご確認ください。

ハワイ旅行のプロセス (PDFファイル 約0.13MB)

事前検査プログラム (PDFファイル 約0.12MB)

必要書類の提示・提出場所 (PDFファイル 約0.12MB)

入国制限情報

ホノルルへ渡航されるお客様へ

渡航する24時間前までにセーフ・トラベルズ・プログラム (Safe Travels Program) への事前登録が必要となります。

事前登録後、出発24時間以内になりましたら健康状態に関する質問にお答えいただく必要があります。

健康状態に関する質問への回答後にQRコードをダウンロードまたは印刷し、出発時にご持参ください。ハワイ到着時に当該QRコードの提示が必要です。

※ QRコードは株式会社デンソーウェブの登録商標です。

Safe Travels Program について

入力手順1 (PDFファイル 約1.8MB)

入力手順2 (PDFファイル 約1.2MB)

また、2020年11月より事前検査プログラムが開始され、日本を出発する72時間以内にハワイ州保健局が指定する日本国内の医療機関で、厚生労働省により承認されているPCR検査を含む複数増幅検査を行い、ハワイ州保健局が指定する陽性証明書 (英語) を提示すれば、ハワイでの14日間の自己隔離が免除されます。詳細はハワイ州観光局ホームページをご覧ください。

ハワイ州政府観光局ホームページ

ハワイ州では州外からの全渡航者 (ハワイ州居住者を含む) に対し、到着後14日間の自己検疫 (自主隔離) が義務付けられています。自主隔離場所から外出することは認められておらず、違反者は5千USドル以下の反則金または1年以下の禁固のいずれかもしくは両方が科せられます。ハワイ州到着時の検疫情報につきましては、ハワイ州政府観光局のホームページなどをご確認ください。



Hawai'i Tourism Japan Initiatives

Digital Messaging

Remote Hawai'i Trip Started November~



Support Hawai'i

4 categories

- Feel Hawai'i
- Discover Hawai'i
- Adventure Hawai'i
- Support Hawai'i



Mālama Hawai'i Initiatives ~ Local NPO Virtual Events ~

11/14, 2020



12/8, 2020



A close-up photograph showing a person's hands holding a small, thin-stemmed plant with green leaves. Another person is pouring water from a brown ceramic pitcher with blue and black patterns into the hands. The background is a blurred field of tall grass. The text "Mahalo Nui Loa & Mālama Pono" is overlaid in white.

**Mahalo Nui Loa
&
Mālama Pono**