



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

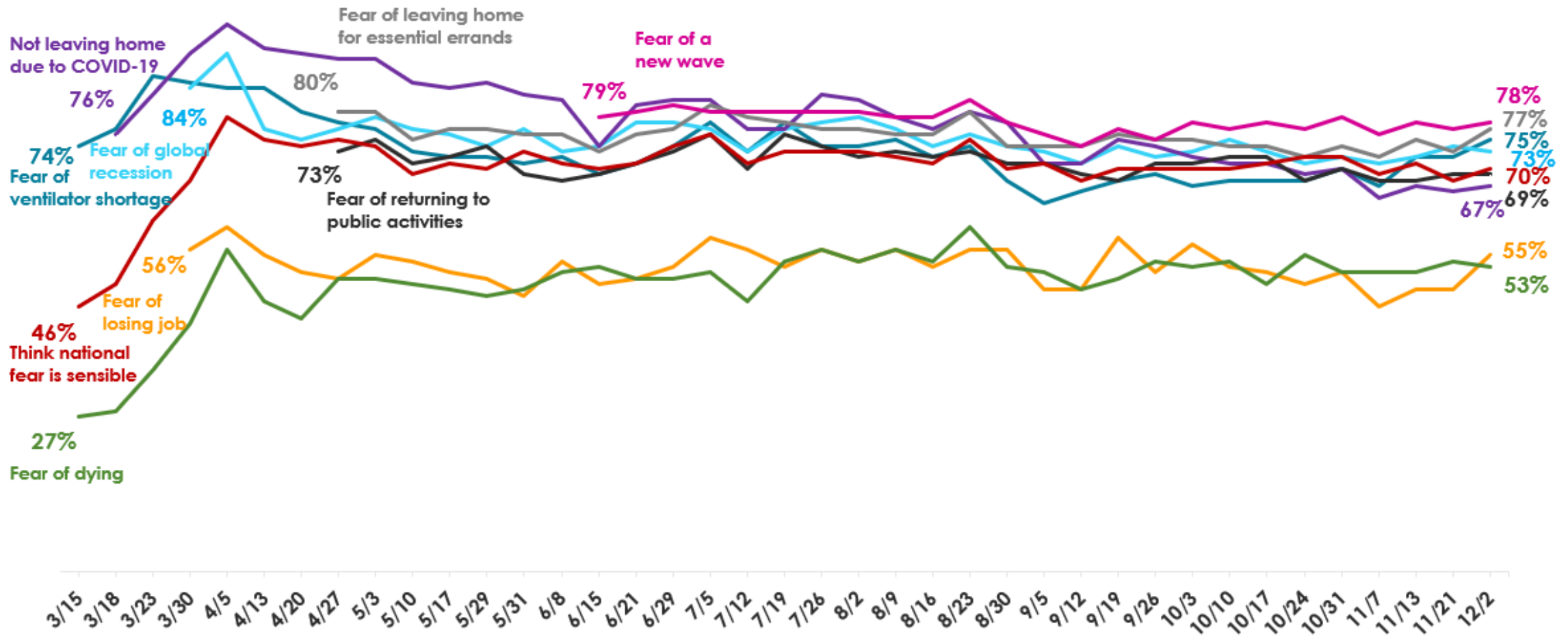




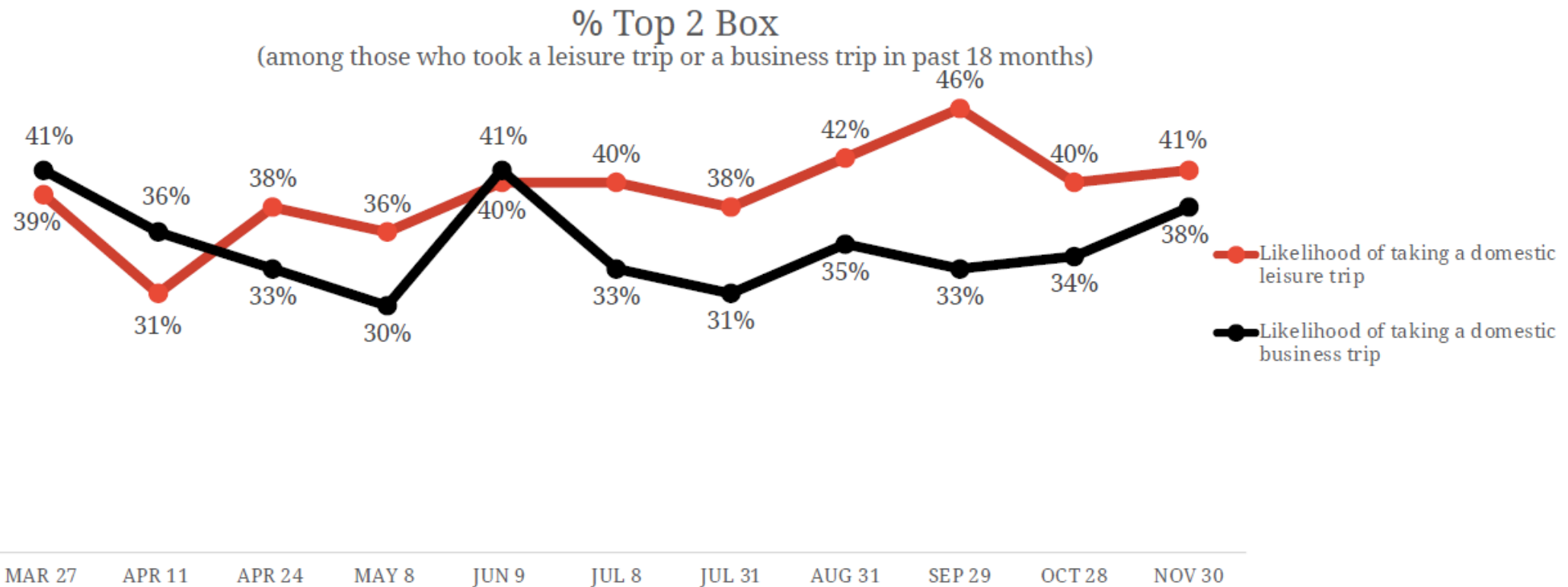
Market Insights

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)



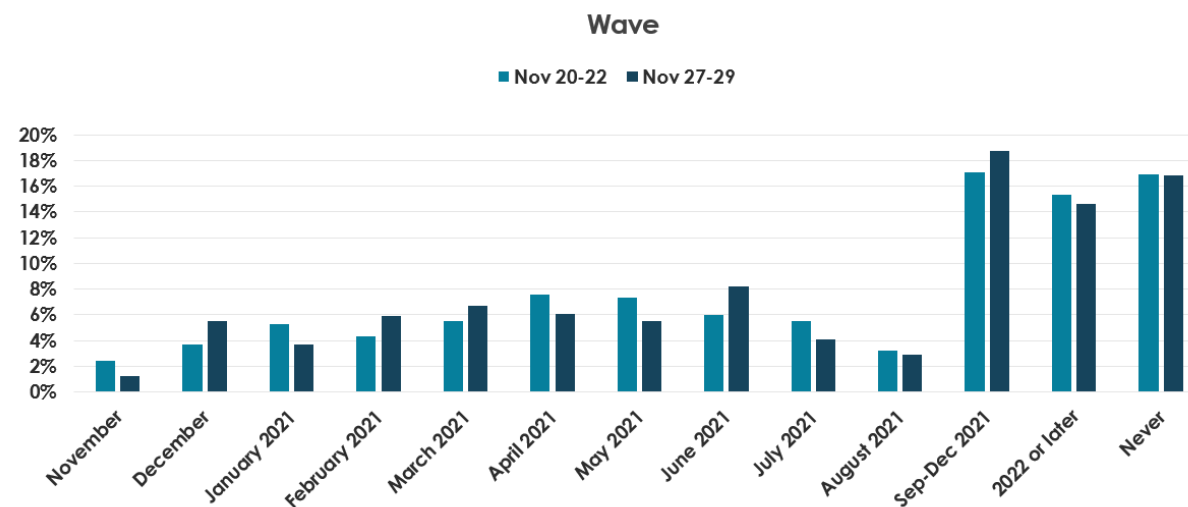
Question / Using a scale of 1 (not at all likely) to 5 (extremely likely), based on how you feel today, how likely are you to engage in each of the following activities during the next 6 months? (Leisure: n=1,164, Business: n=737)

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.



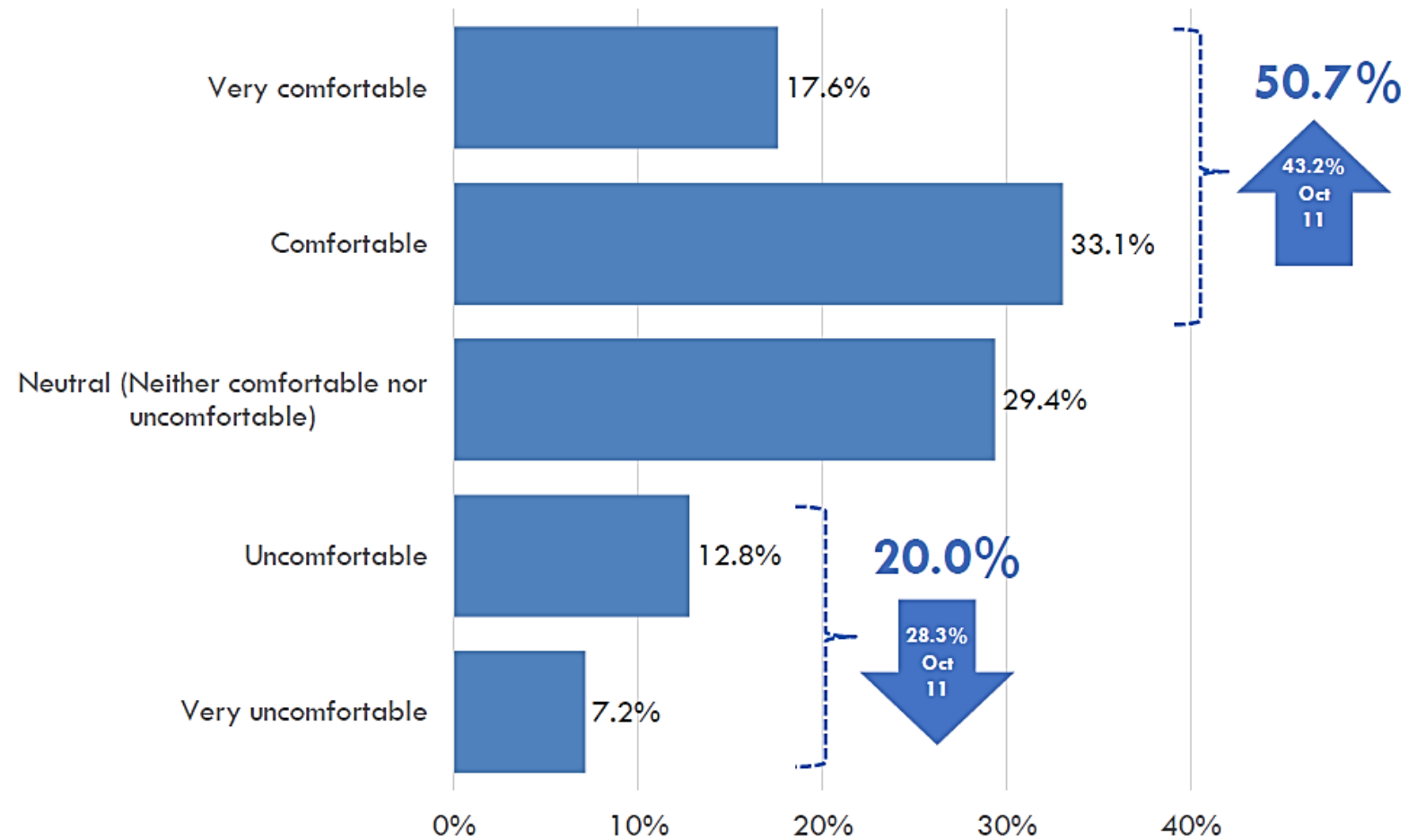
Source: Destination Analysts Coronavirus Travel Sentiment Index Report Wave 37-38

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)

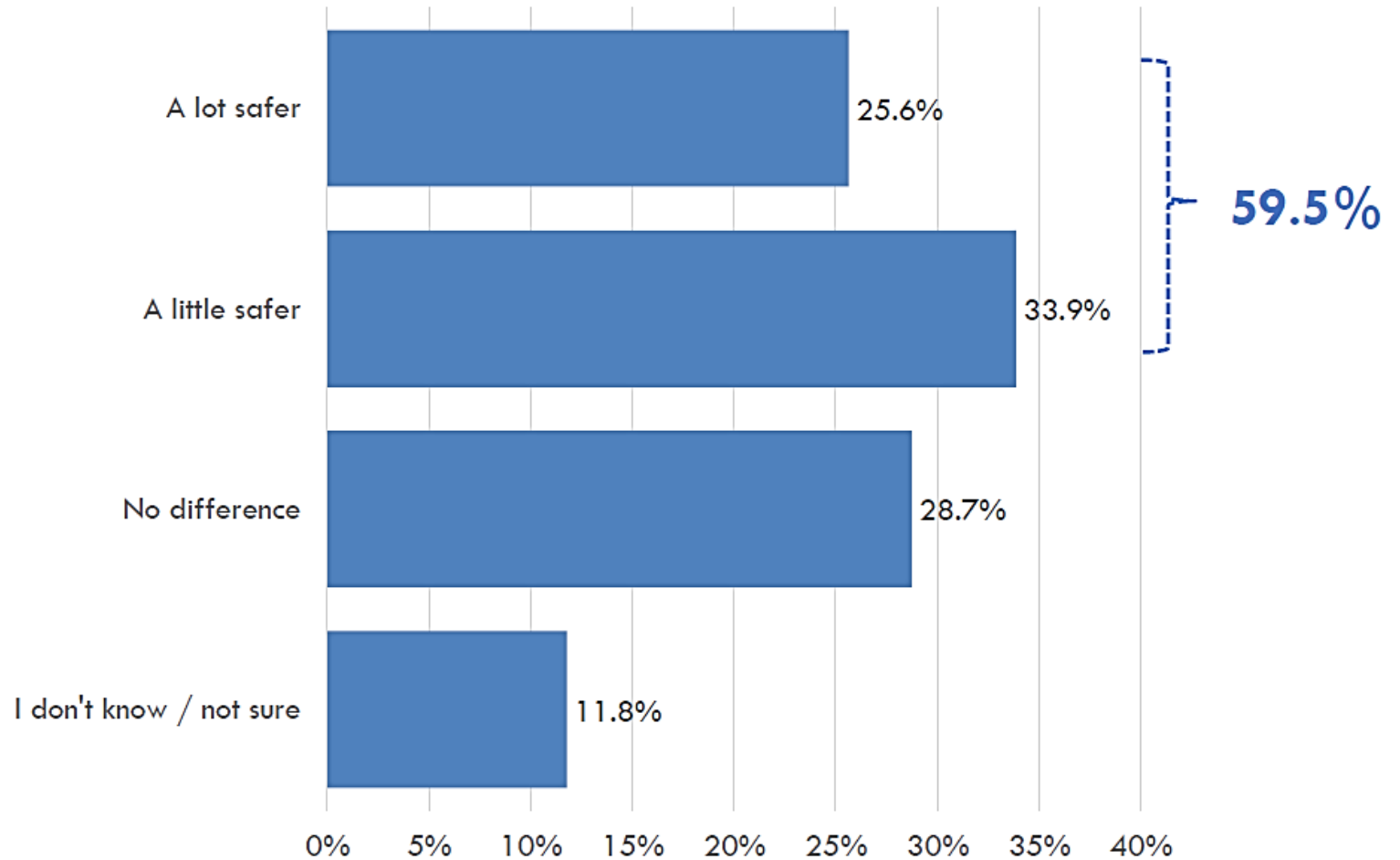


Vaccine Requirements for Air Travel

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)

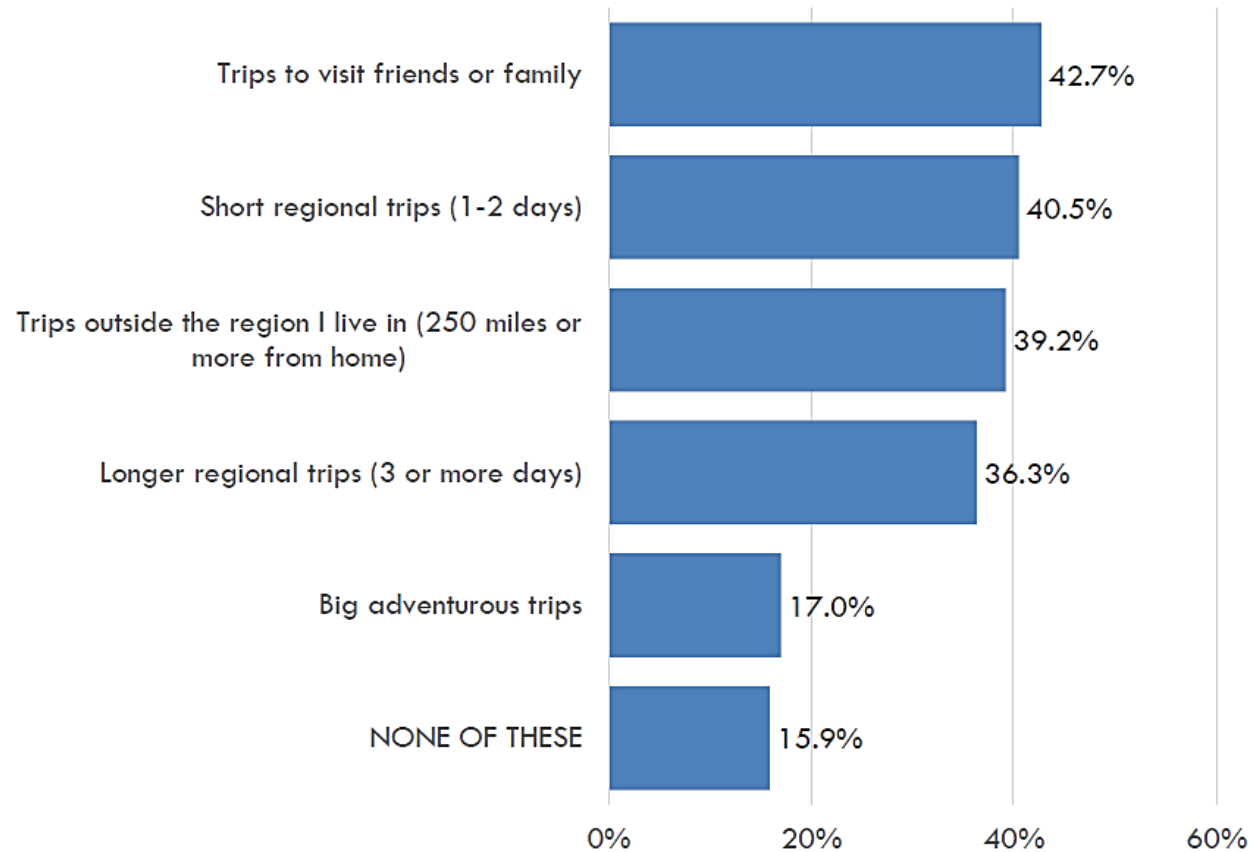


Trips Immediately after Vaccine Distribution

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?

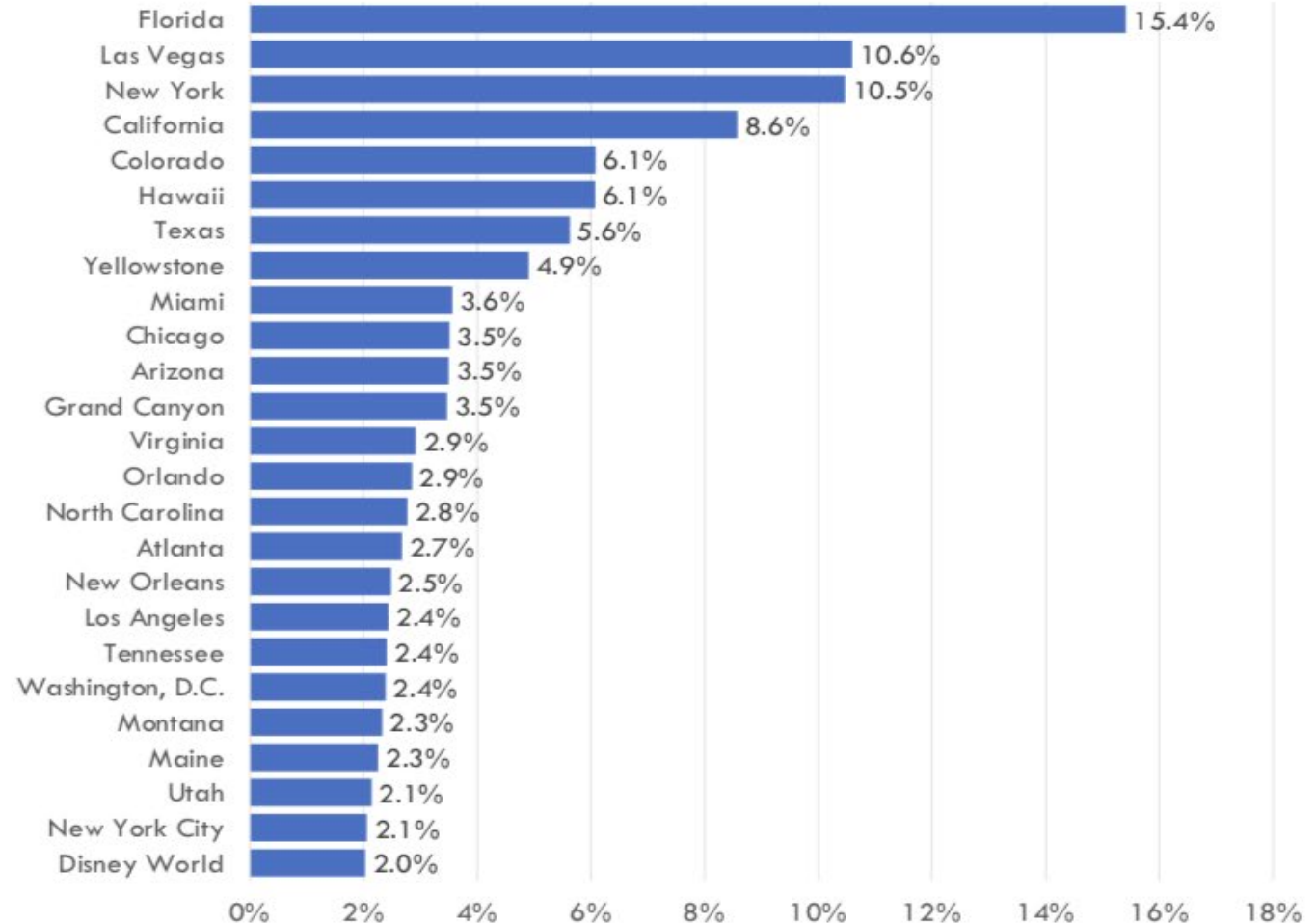
(Base: Wave 38 data. All respondents, 1,205 completed surveys. Data collected November 27-29, 2020)



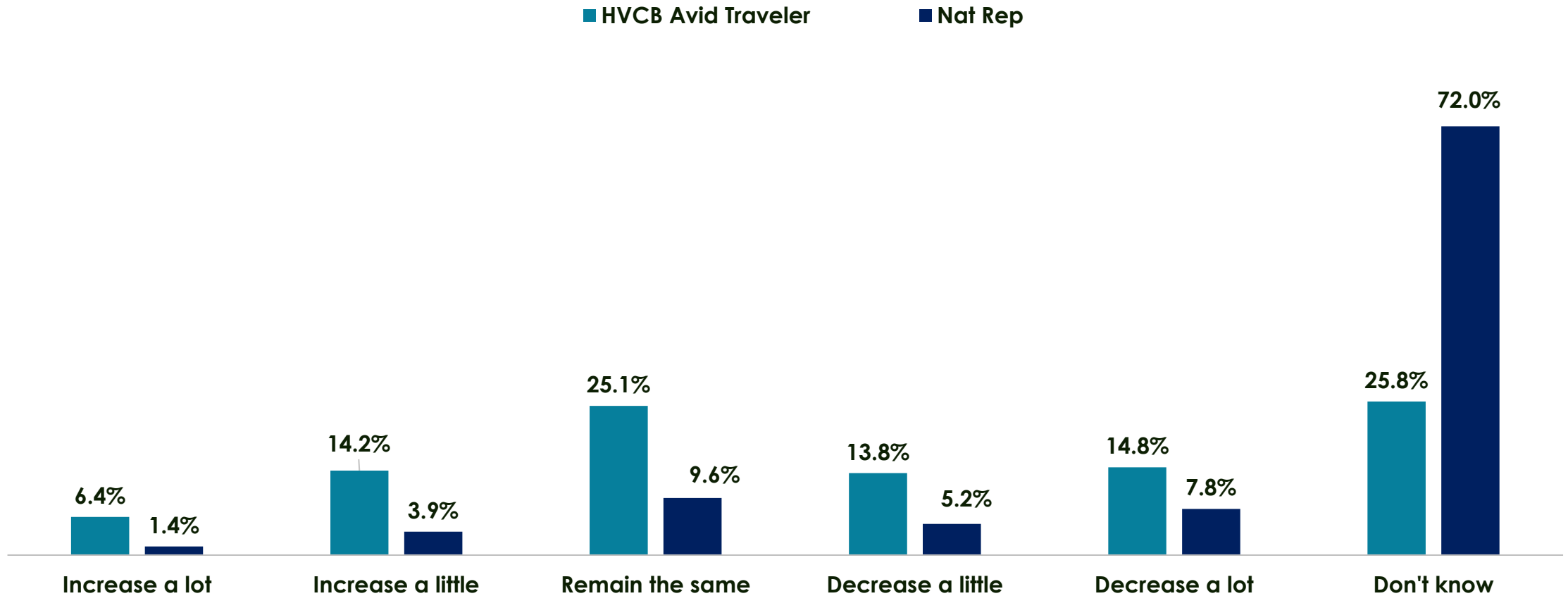
Domestic Destinations Planned for in 2021 (unaided)

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

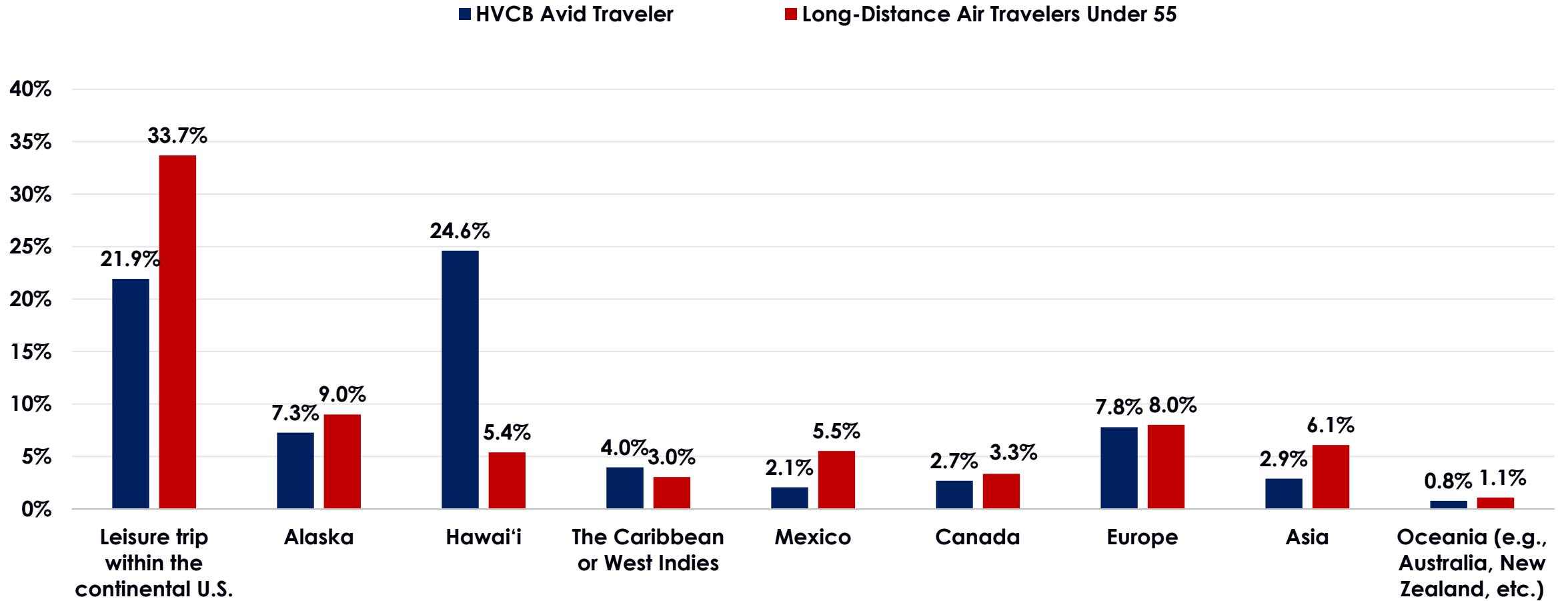
(Base: Wave 39 data. All respondents, 1,204 completed surveys. Data collected December 4-6, 2020)



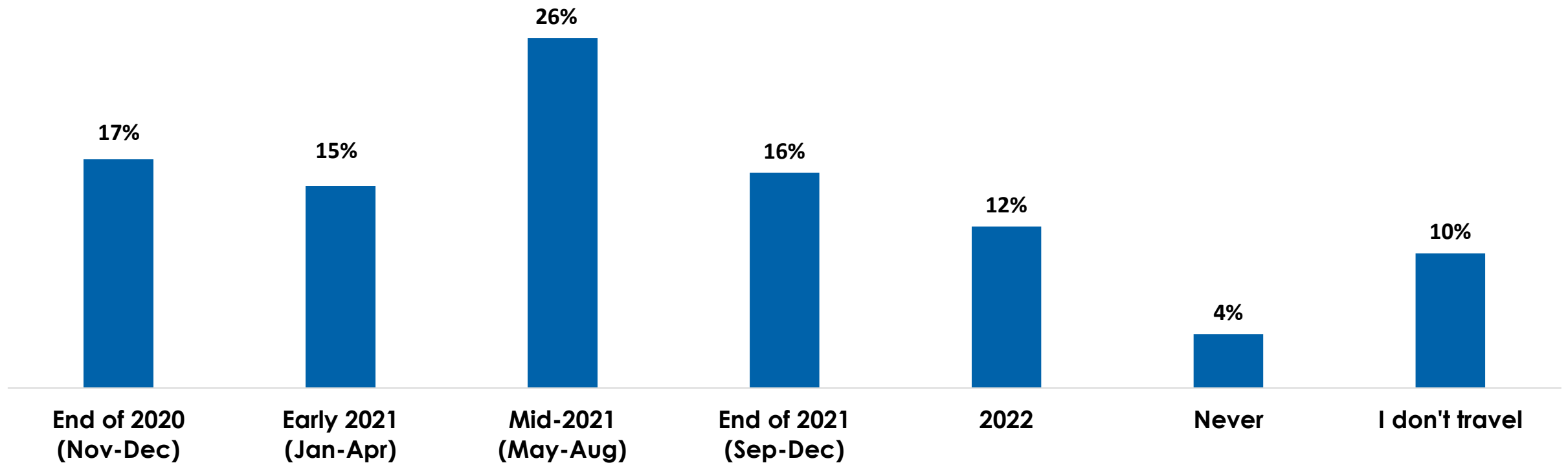
Future Travel – Expected change to air travel in the next 12 months



Next Leisure Destination

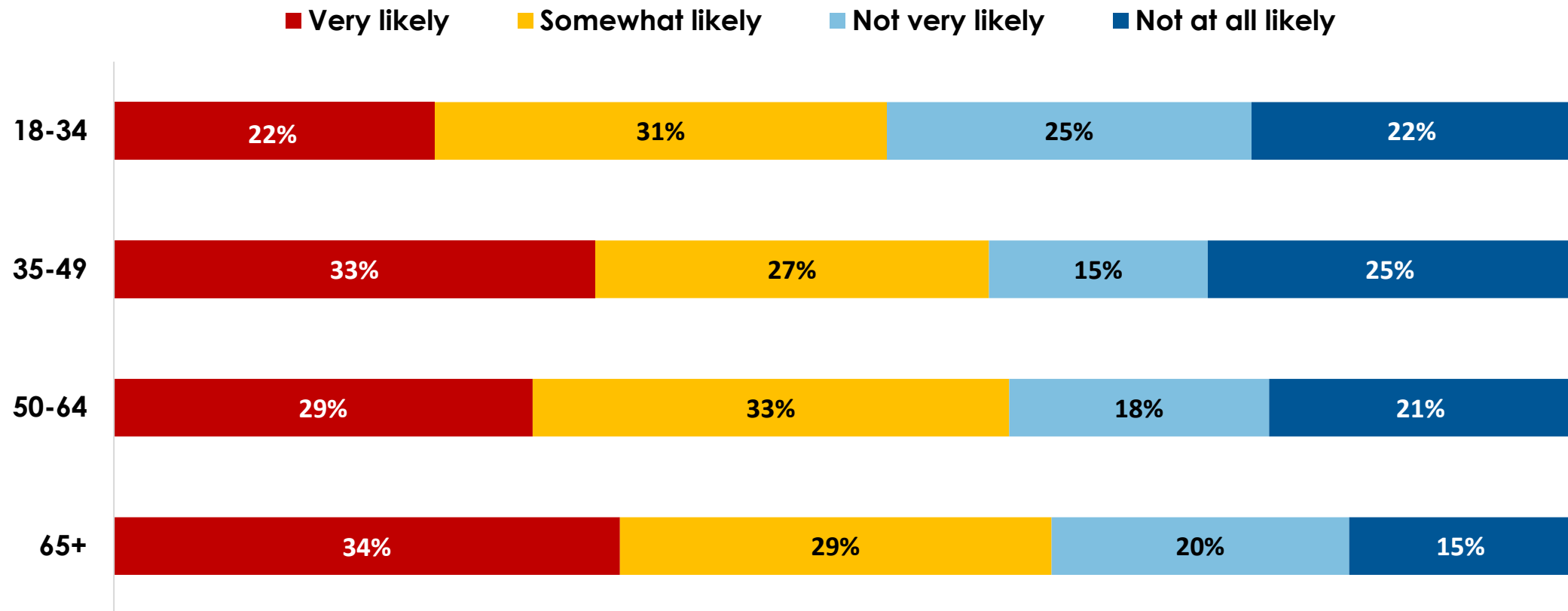


When, if ever, do you think you will be ready to travel?



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

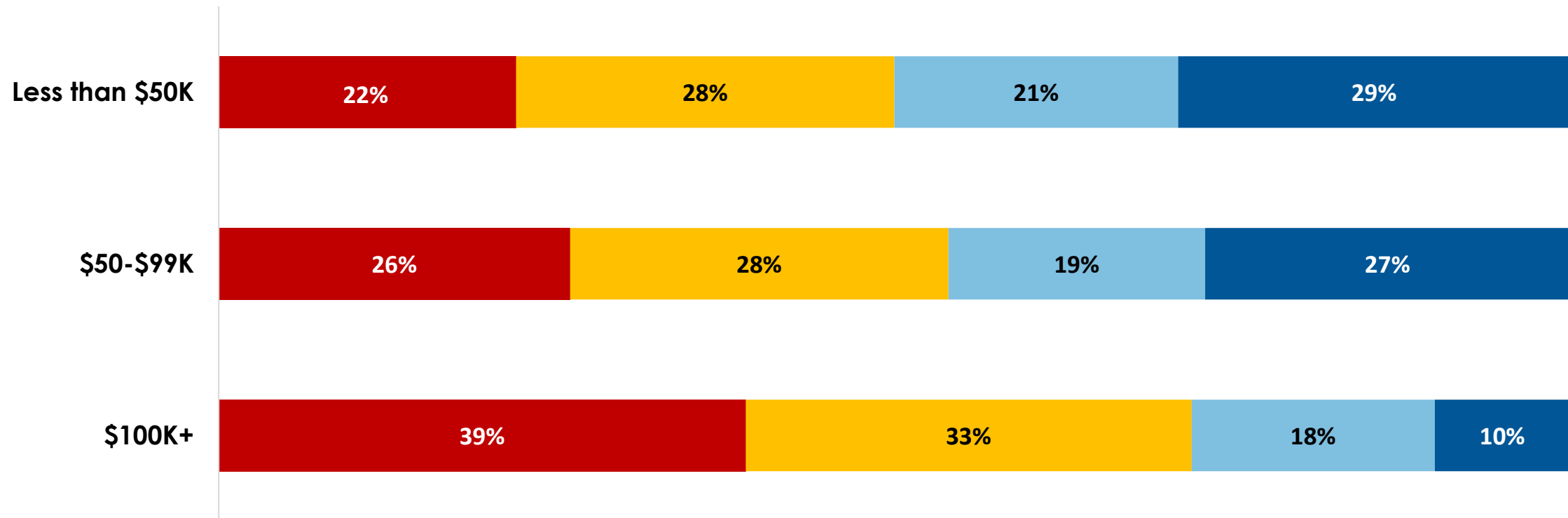
By Age



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

By Income

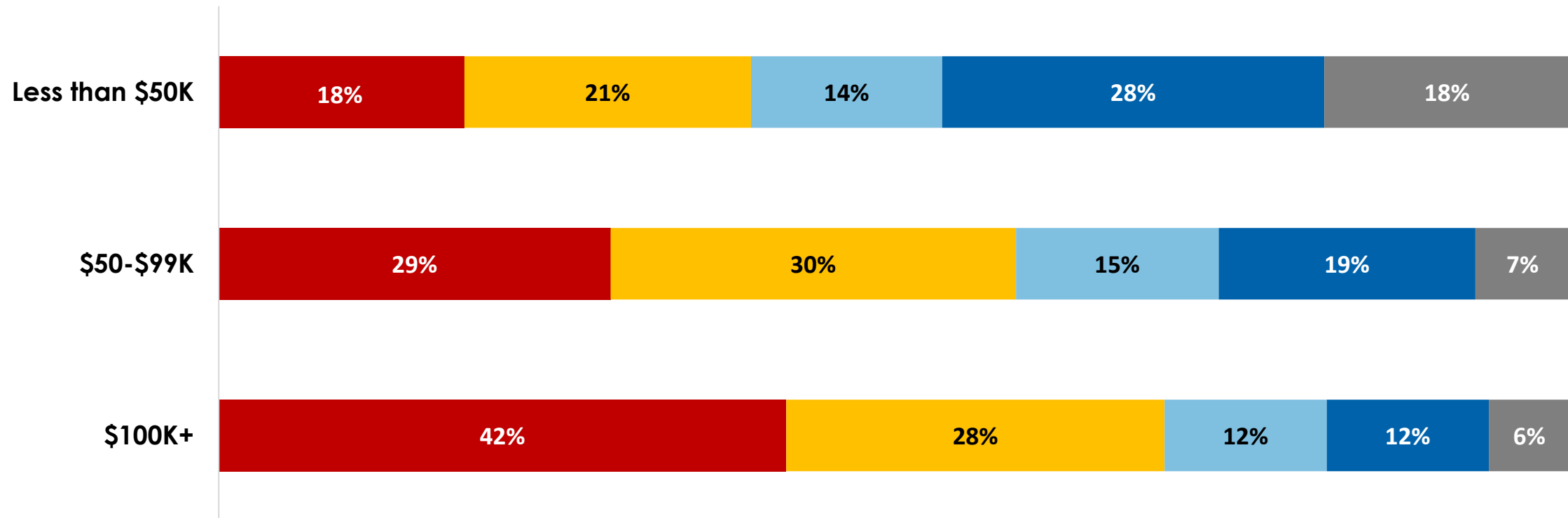
■ Very likely ■ Somewhat likely ■ Not very likely ■ Not at all likely



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

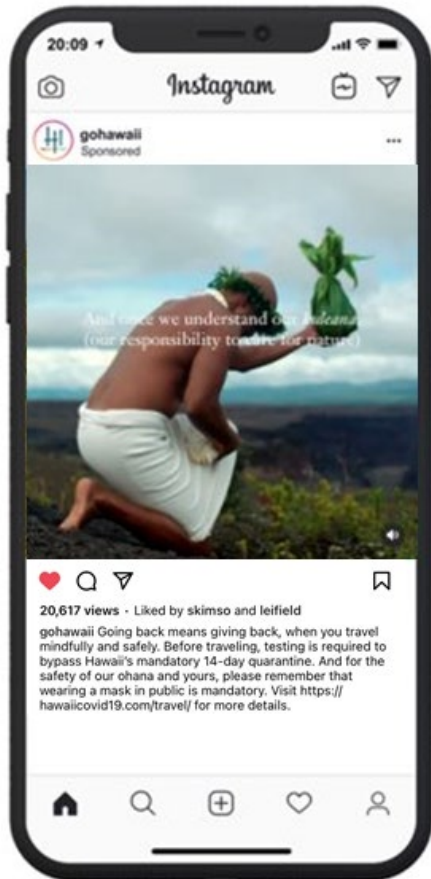
Flight Dates: 10/16 - 12/31

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

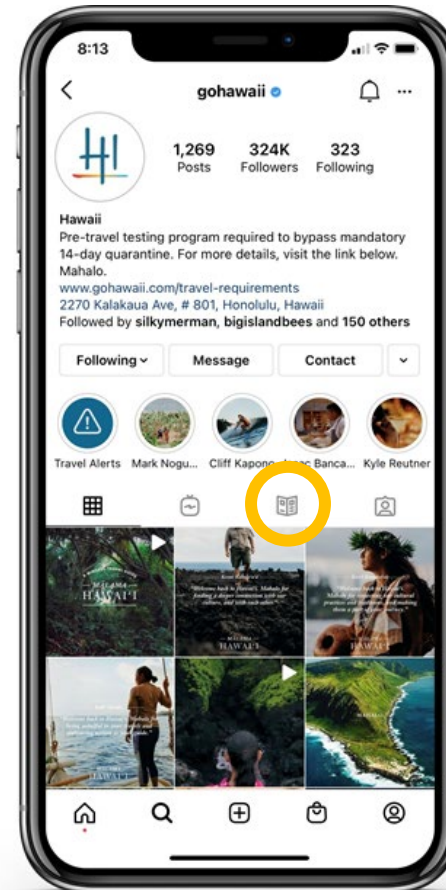
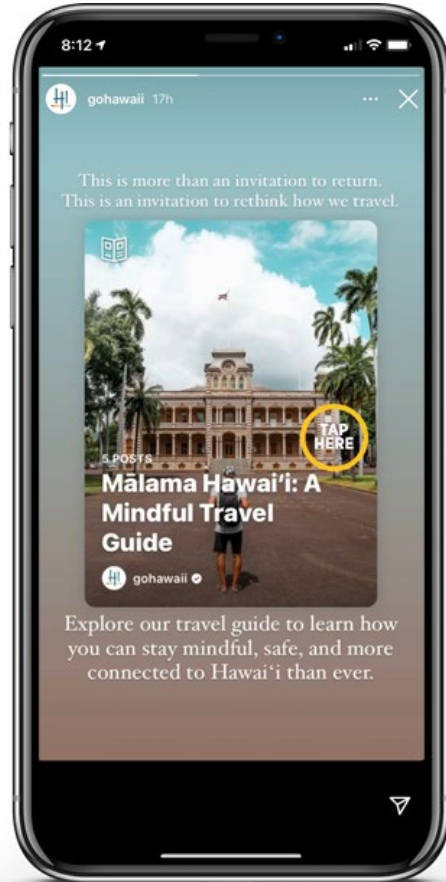
An invitation to return using our Hawai‘i Rooted Ambassadors



Mindful Travel Guide

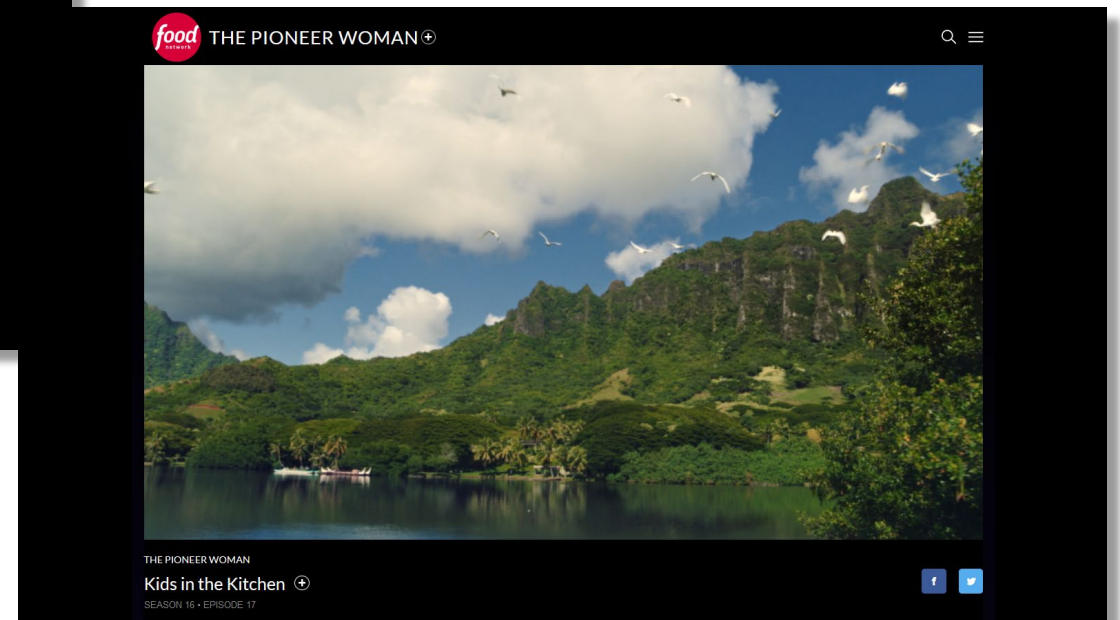
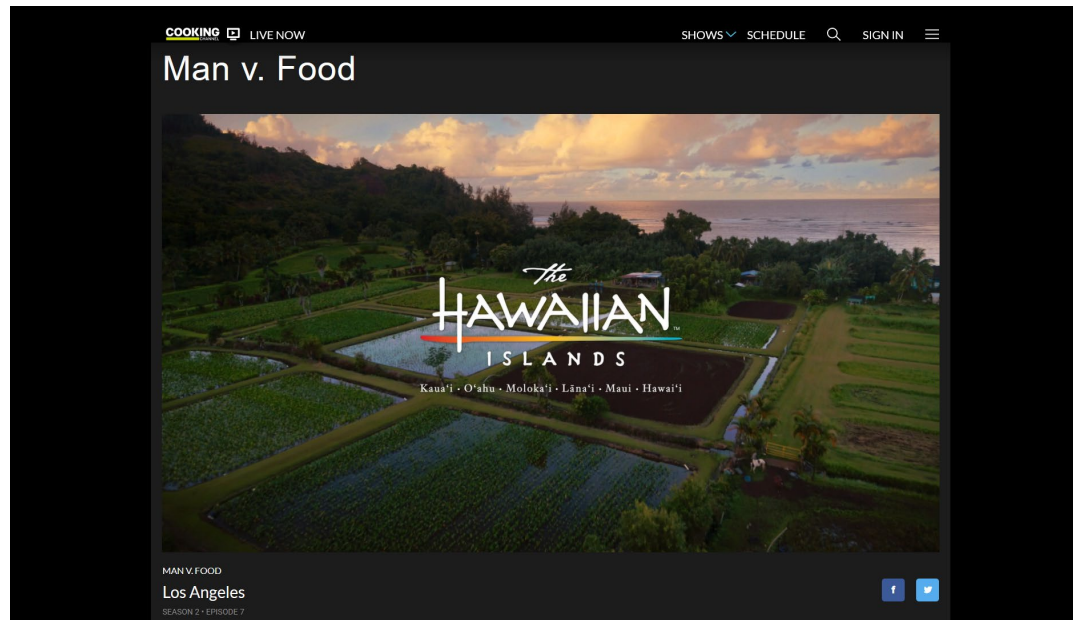
Organic In-Feed & Story

How to get there



OTT Video

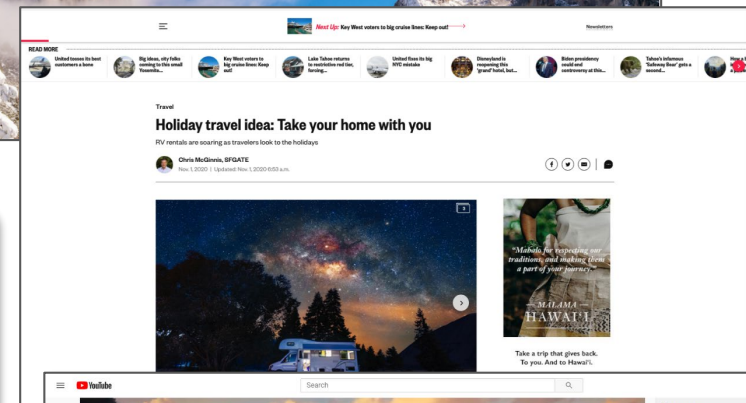
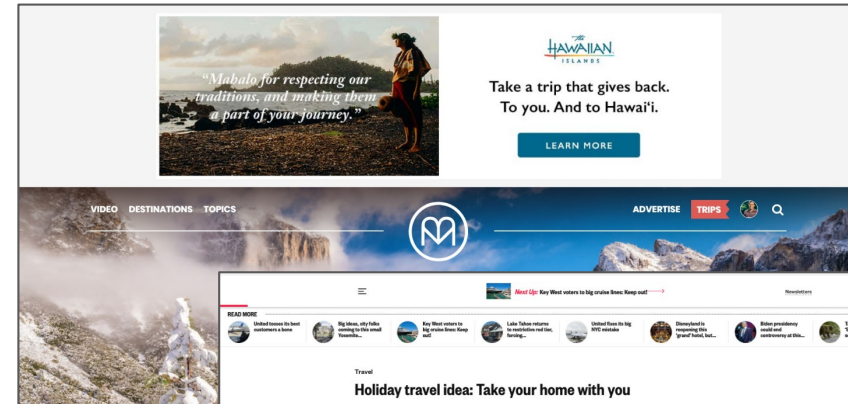
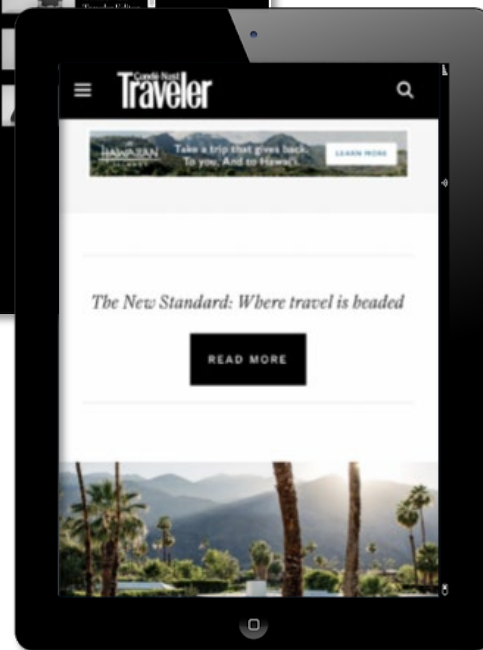
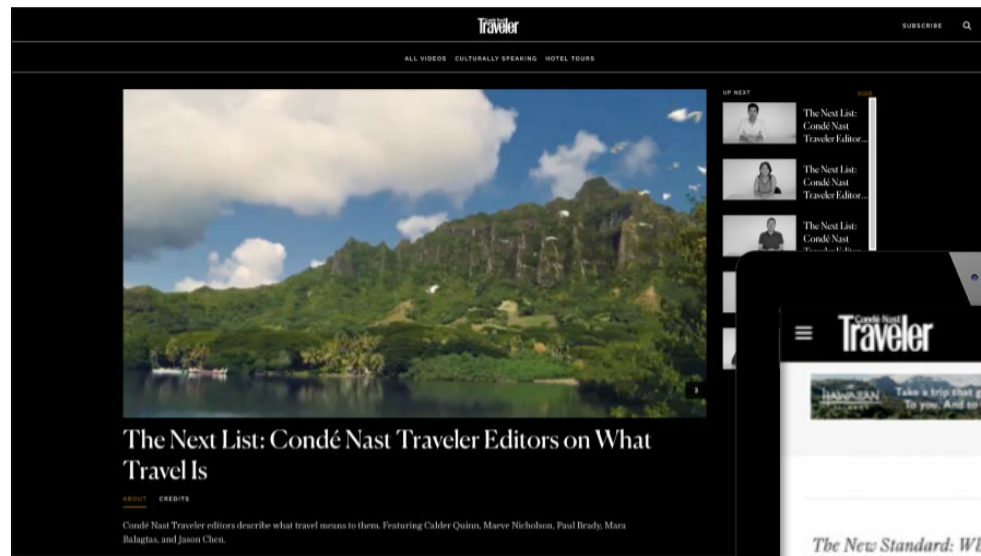
Flight Dates: 11/9/20 – 12/20/20



Digital Campaign

Flight Dates: 11/9/20 – 12/20/20

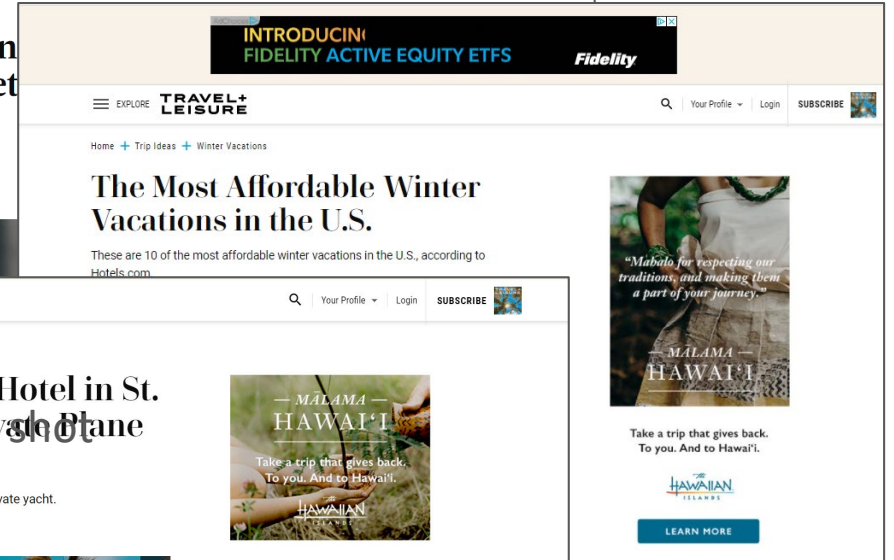
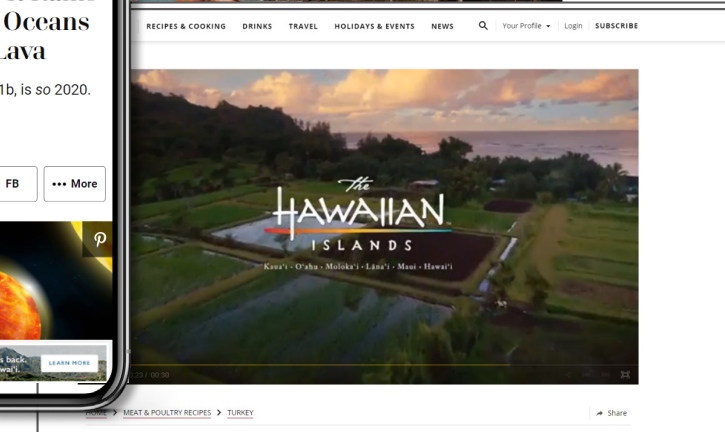
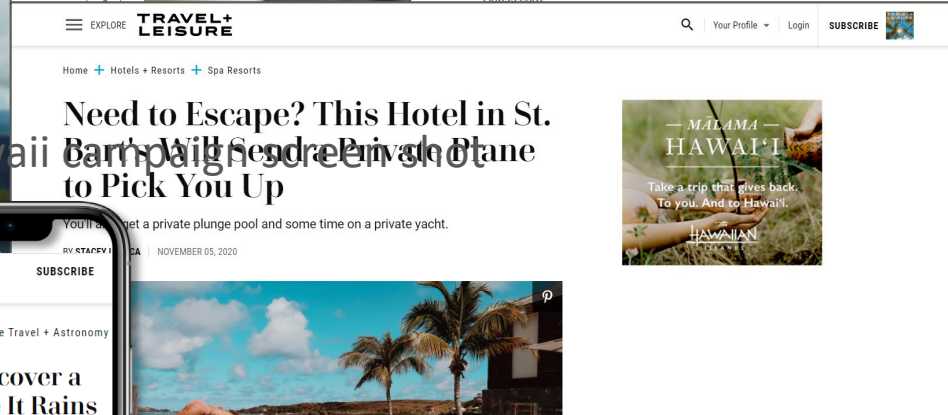
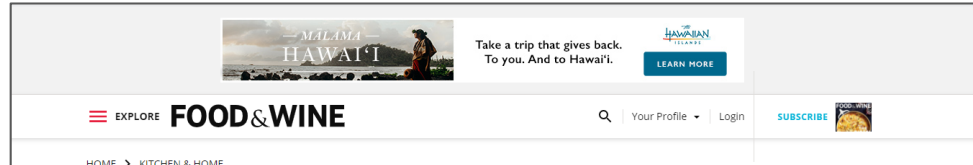
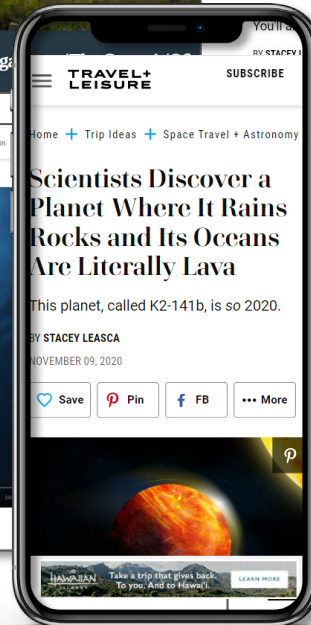
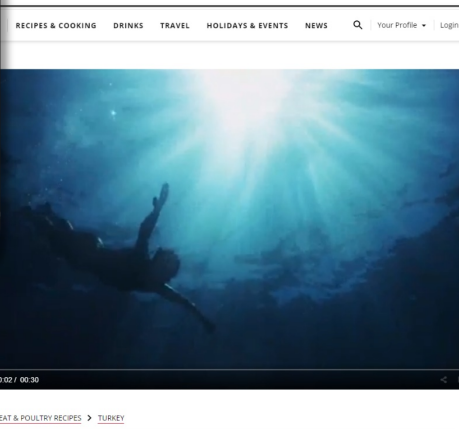
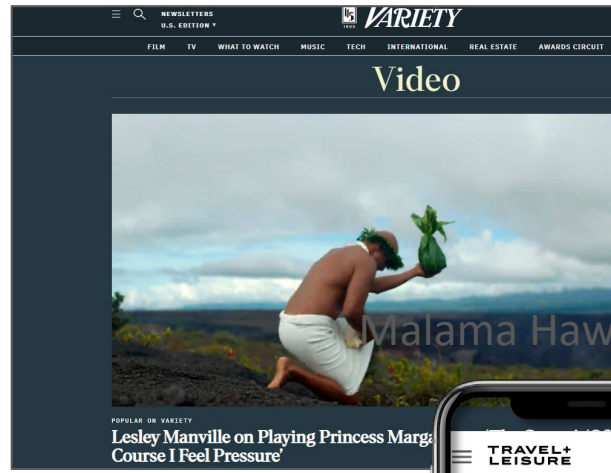
- Conde Nast Traveler
- Matador
- YouTube



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



“Mahalo for respecting our traditions, and making them a part of your journey.”

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

LEARN MORE

LAist

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

READ NOW

JEOPARDY!

MALAMA HAWAII

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

Los Angeles Times

“Mahalo for respecting our traditions, and making them a part of your journey.”

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

LEARN MORE

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

hawaiiocovid19.com/travel

7x7

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

MALAMA HAWAII

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LEARN MORE

8 ways Hawaii is ideal for healthy living and social distancing

By Sunny Fitzgerald Nov 18, 2020

Like us on Facebook

Where to Dine Outdoors In San Francisco, by Neighborhood

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Neighborhoods

Valencia Street goes car-free on weekend evenings for outdoor shopping, dining, and drinks

LA WEEKLY

“Mahalo for respecting our traditions, and making them a part of your journey.”

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LEARN MORE

NEWS FOOD MUSIC ENTERTAINMENT ARTS CULTURE PODCAST CANNABIS CBD CALENDAR

7x7

Courtesy of the owner, via Airbnb

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

“Mahalo for respecting our traditions, and making them a part of your journey.”

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Business

The Seattle Times

“Mahalo for respecting our traditions, and making them a part of your journey.”

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Entertainment

Enjoy

SFGATE

“Mahalo for respecting our traditions, and making them a part of your journey.”

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News Sports Local Culture Food Tahoe

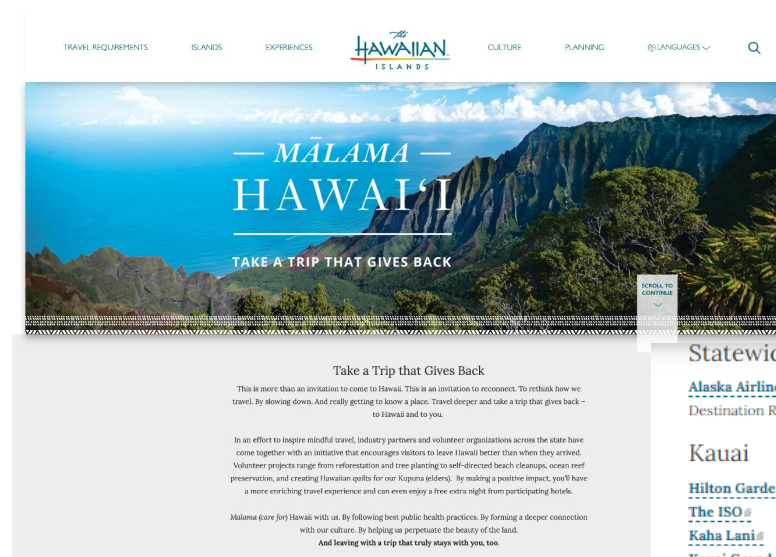


Mālama Hawai'i Program Update



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 Surf Rider, 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

MALAMA 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. Check-out 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.

Search form with fields for DESTINATION, DATES, and PROMO CODE. Includes a 'Find Hotels' button and a 'Terms & Conditions' link.

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 way Hawaii with us, by following local 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 delight 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-reported monitoring data sheet when return the gloves to the store.

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 when 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, Momosan, 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

BOOK OFFER

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AIR INCLUSIVE PACKAGES
SIGNATURE EXPERIENCES
ALL SPECIALS



— 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.

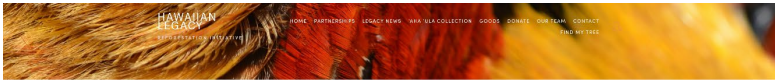


@FSMaui | #FSMaui




— 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 DRAWING ON A TOUR AT BEAUTIFUL QUENTON FOX RANCH (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



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."

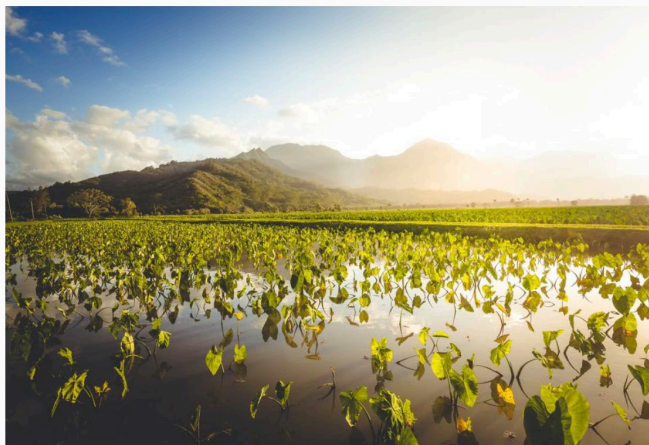
Earned Media Coverage

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)



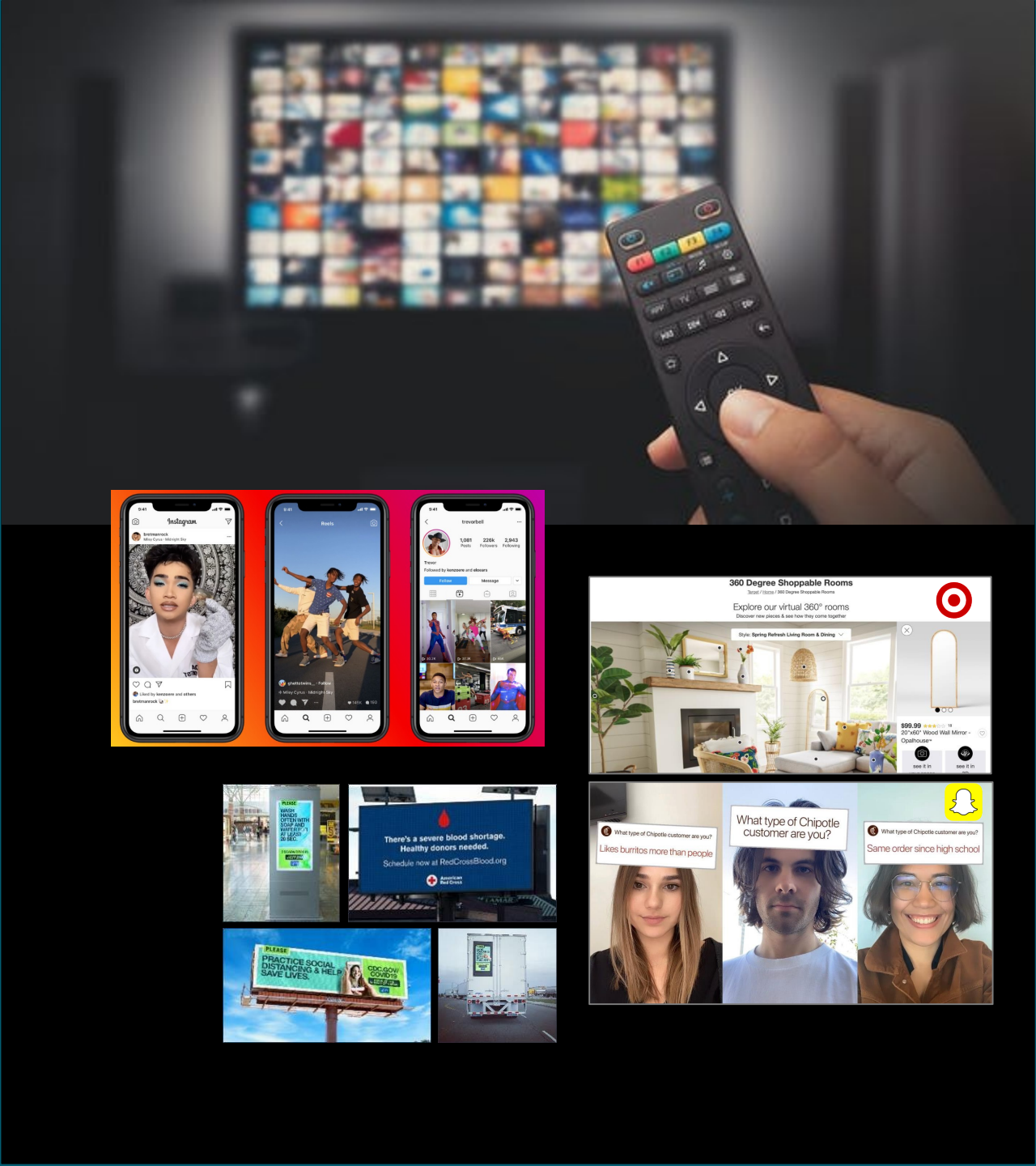
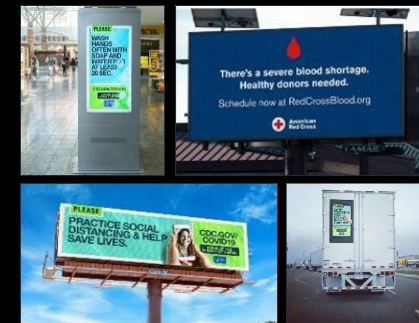
2021 Creative Messaging

- 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

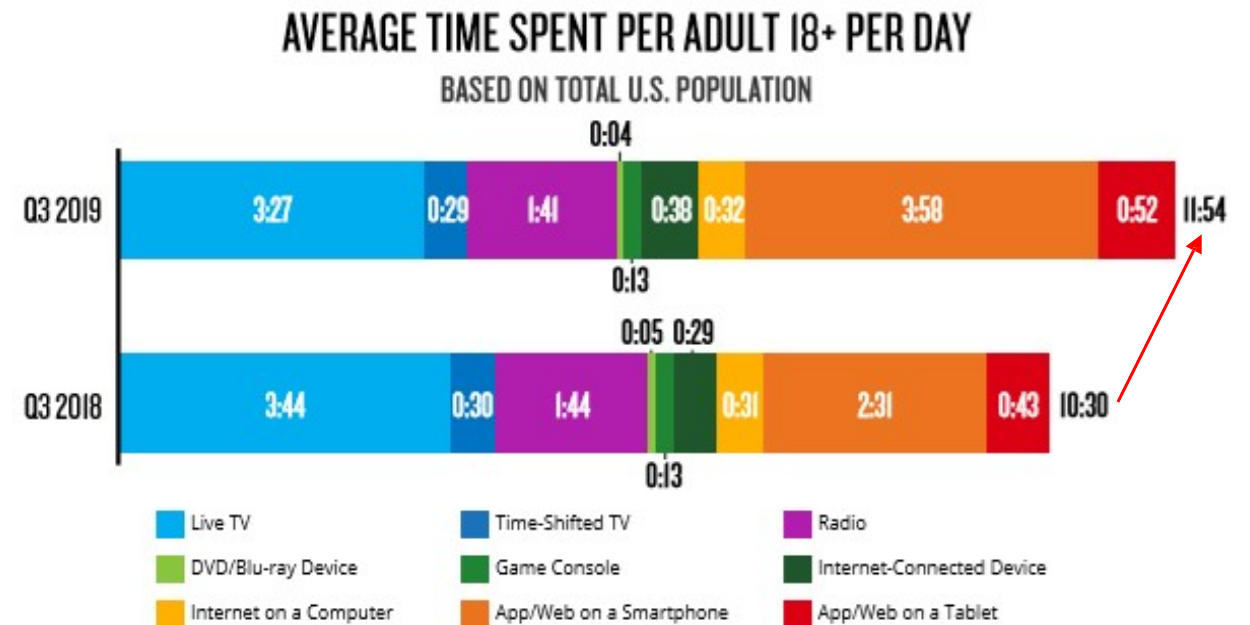




Video

Adults spend half their day connected to media

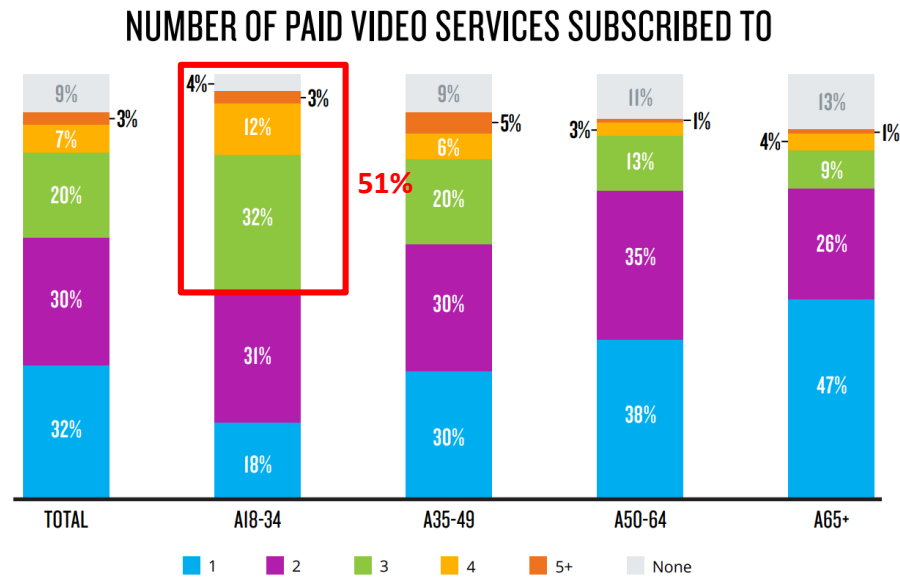
- Consumers spend nearly 12 hours a day across TV, CTV, Radio, Computers, Smartphones and tablets
- Increase mostly driven by smartphone usage (+55%)



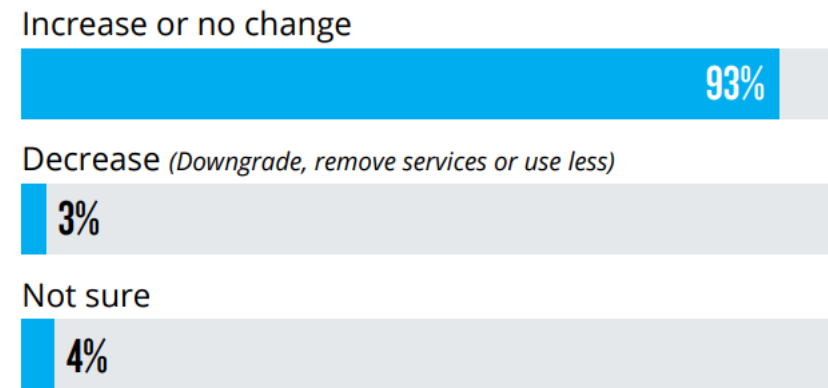
Note: Some amount of simultaneous usage may occur across devices. Internet Connected Device is inclusive of Smart TV app usage. Measurement enhancements to the mobile panel in the past year contributed to increases in usage levels beyond pure organic growth.

Source: Nielsen February 2020 Total Audience Report

The fight for the connected consumer



FUTURE ACTION OF PAID VIDEO STREAMING SUBSCRIBERS



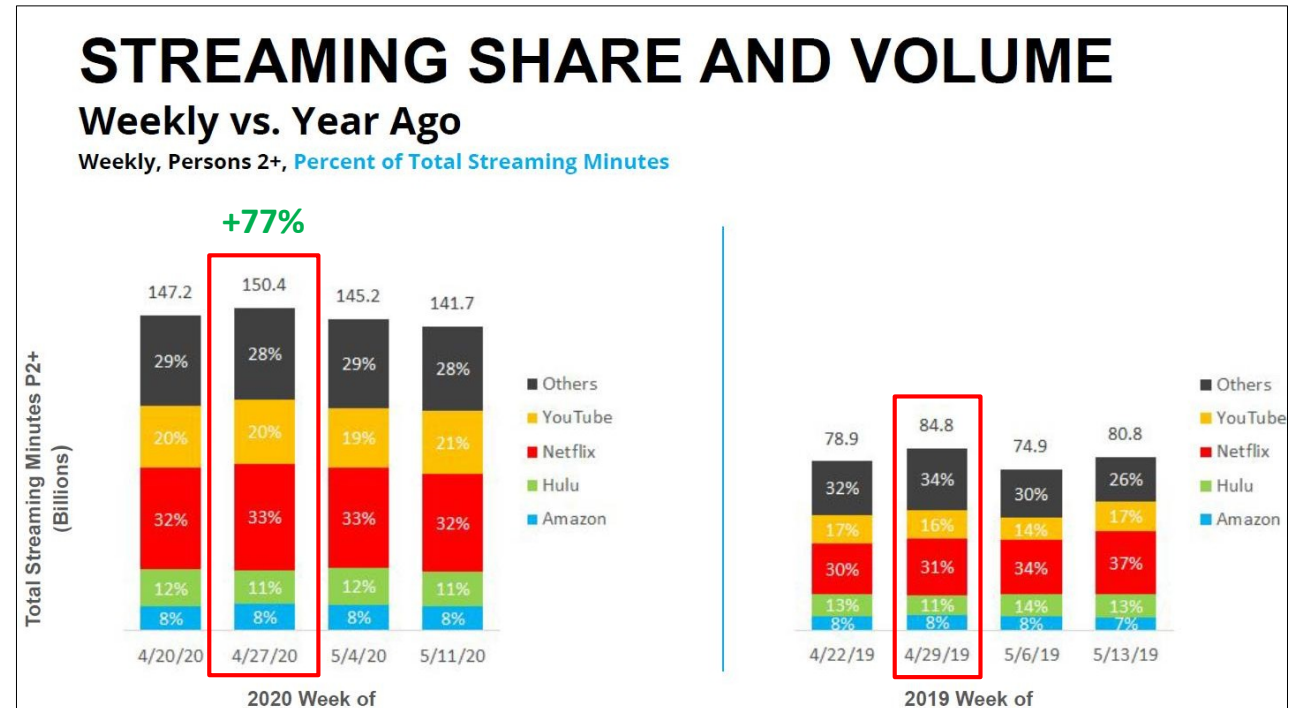
- Half of A18-34 (51%) said they currently are subscribed to three or more paid streaming services
- With no sign of stopping, 93% of video subscribers plan on an increase or no change to their streaming habits



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 a grid pattern and various data visualizations like bar charts, line graphs, and a globe. The word "Digital" is written in white in the bottom left corner.

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)

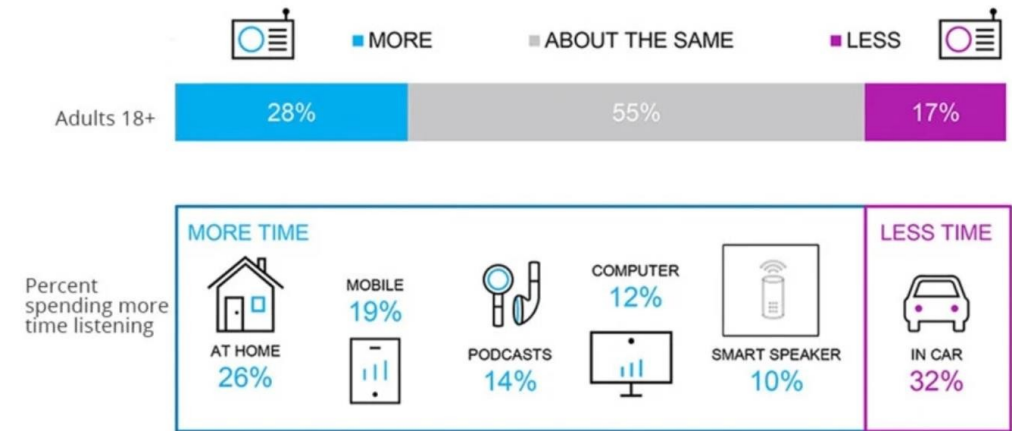
Timeframe	2019	2020	2021	2022	2023
Digital	\$132.46	\$154.58	\$177.64	\$198.34	\$215.25
– Mobile	\$87.30	\$105.34	\$123.59	\$140.72	\$155.26
TV*	\$70.59	\$72.00	\$71.28	\$70.57	\$69.86
Print	\$15.41	\$12.92	\$11.02	\$9.63	\$8.86
– Newspaper*	\$7.96	\$6.44	\$5.29	\$4.44	\$4.08
– Magazine*	\$7.45	\$6.48	\$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

