



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

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

*Pō 'akolu, 27 Ianuali 2021, 10:30a.m.*  
**Wednesday, January 27, 2021 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.**

*E kāinoa mua no kēia hālāwai:*

**Register in advance for this webinar:**

[https://zoom.us/webinar/register/WN\\_pz9X3mzQRKyHTWOv19jgoQ](https://zoom.us/webinar/register/WN_pz9X3mzQRKyHTWOv19jgoQ)

*Ma hope o ke kāinoa 'ana, e ho 'ouna 'ia ka leka uila  
hō 'oia iā 'oe me ka 'ikepili ho 'oku 'i hālāwai.*  
**After registering, you will receive a confirmation email  
containing information about joining the webinar.**

*Papa Kumumana 'o*  
**AGENDA**

1. *Ho 'omaka A Pule*  
Call to Order and Pule
2. *'Āpono I Ka Mo 'o 'ōlelo Hālāwai*  
Approval of Minutes of the December 16, 2020 Marketing Standing Committee Meeting
3. *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



4. *Hō'ike A Hawai'i Tourism Korea No Ke Kūlana Huaka 'i*  
Presentation by Hawai'i Tourism Korea regarding the state of and progress of the Travel Testing Partners
5. *Hō'ike A Hawai'i Visitors & Convention Bureau No Ka Hapahā Mua*  
Presentation by HVCB that will include market insights, updates on air seats to the destination for the first half of 2021, and updates on calendar year 2021 as it relates to certain assumptions and approaches including but not limited to programs happening in the 1st quarter
6. *Hō'ike A Hawai'i Tourism Japan No Ke Kūlana Huaka 'i*  
Presentation by HTJ including market insights, updates on airlines booking pace, updates on the leisure and group segments and programs to be engaged in Q1 and calendar year of 2021
7. *Ho'oku'u*  
Adjournment

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

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

*Kono 'ia ka lehulehu e nānā mai i ka hālāwai a ho'ouna mai i ka 'ōlelo hō'ike kākau 'ia no kēlā me kēia kumuhana i helu 'ia ma ka papa kumumana 'o. Hiki ke ho'ouna mai i nā 'ōlelo hō'ike kākau 'ia ma mua o ka hālāwai iā [ariana.kwan@gohta.net](mailto: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](mailto: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](mailto: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](mailto: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  
December 16, 2020

HTA Marketing Standing Committee Meeting



**MARKETING STANDING COMMITTEE MEETING  
HAWAII TOURISM AUTHORITY  
Wednesday, December 16, 2020  
Virtual Meeting**

**MINUTES OF MARKETING STANDING COMMITTEE MEETING**

<b>COMMITTEE MEMBERS PRESENT:</b>	Kelly Sanders (Chair), Fred Atkins, George Kam, Kyoko Kimura, Sherry Menor-McNamara, and Benjamin Rafter
<b>HTA STAFF PRESENT:</b>	John De Fries, Keith Regan, Pattie Herman, Marc Togashi, Marisa Yamane, Kalani Ka'anā'anā, Caroline Anderson, Jennifer Chun, and Maka Casson-Fisher
<b>GUESTS:</b>	Representative Richard Onishi, John Monahan, Jay Talwar, and Eric Takahata
<b>LEGAL COUNSEL:</b>	Gregg Kinkley

**1. Call to Order and Pule:**

Chair Kelly Sanders called the meeting to order at 10:34 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. Maka Casson-Fisher opened the meeting with a pule.

**2. Approval of Minutes of the November 18, 2020 HTA Marketing Standing Committee Meeting:**

Chair Sanders requested a motion to approve the minutes of the November 18, 2020 HTA Marketing Standing Committee meeting. George Kam made a motion, which was seconded by Fred Atkins. The motion was unanimously approved.

**3. 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:**

Chair Sanders recognized Pattie Herman, HTA Vice President of Marketing & Product Development, to present the revised Fiscal Year 2021 Branding Budget. Ms. Herman said that the budget must remain fluid and be able to pivot to accommodate market conditions.



Ms. Herman presented the revised Branding Budget for Fiscal Year 2021. She said that Cruises would remain at \$50,000. The U.S. line item would be reduced by \$685,707 to \$17 million mostly as a result of staffing changes.

Ms. Herman said that the Canada line item would be increased by \$26,180 to \$400,000. She noted that the situation in Canada is improving due to the trusted travel partner program being in place and direct flights with WestJet and Air Canada resuming.

Ms. Herman said that the Japan line item would be reduced by \$500,000 to \$4,500,000. She noted that the Japanese government is recommending that Japanese citizens not travel at this time due to a spike in COVID-19 cases. Ms. Herman said that the Korea line item would be reduced by \$100,000 to \$300,000 for similar reasons.

Ms. Herman said that the Oceania line item would be reduced by \$100,000 to \$400,000 because the borders in Australia and New Zealand remain closed. She noted that there is a stop work order for the Oceania marketing team. She added that if flights resume in June 2021 as anticipated, then the Oceania marketing team would resume activities in February 2021. Ms. Herman explained that many other destinations are fighting for the same travelers, and marketing activities will need to resume quickly.

Ms. Herman said that the line items for Global Digital Marketing Strategy and Global Market Shared Resources would remain the same. She noted that the Global Market Shared Resources is a critically important entity that HVCB and HTA's other global marketing teams utilize.

Ms. Herman said that the Travel line item would be reduced by \$40,000 to \$10,000. She explained that this line item is the travel budget for John De Fries, HTA President & CEO. However, given the current state of COVID-19, she does not anticipate Mr. De Fries traveling much. Ms. Herman said that the Salaries line item increased by \$26,363 to \$535,011. She noted that the overall Branding budget decreased from \$28,590,675 to \$27,217,511.

Chair Sanders said that the decreases are in line with market perspectives and commended Ms. Herman and her team for saving money where possible.

Mr. Kam asked if it is possible to ask the respective markets for quarterly projections for 2021, and to prepare a report of the nexus between money invested in the market and the respective returns. Ms. Herman responded that it will be difficult for the marketing teams to project into 2021, but she will reach out to them to gather what projections they may have.



Benjamin Rafter asked Ms. Herman about her confidence level for the first quarter of 2021 or if she believes tourism will remain flat. Ms. Herman responded that she hopes the vaccine will make a difference for the domestic market, but based on the signals they are receiving from the international market and flight volume she is not confident. She noted that Canada and possibly Japan may make more of a difference moving forward.

Kyoko Kimura asked if the Meetings, Conventions, and Incentives (MCI) line item is included in the U.S. line item. Marc Togashi, HTA Vice President of Finance, responded in the affirmative and noted that HVCB will need to balance MCI and leisure with the budget available. John Monahan of HVCB added that there has not been much group business. He said that HVCB currently has MCI sales staff that are multi-tasking. He noted that the group sales staff will build up again when business returns.

Mr. Atkins asked if the \$17,000,000 U.S. line item includes the \$2,300,000 budget for MCI, and if so, then HVCB has a marketing budget of \$14,700,000. Mr. Togashi responded in the affirmative and noted that the line items used to be separated.

Chair Sanders invited the public to provide testimony, and there was none.

#### **4. Presentation and Discussion of the Travel Agents Booking Pace and General Market Research Trends:**

Chair Sanders recognized Jennifer Chun, HTA Director of Tourism Research, to present on travel agent booking pace. Ms. Chun reported that the U.S. market for December 2020 is a third of the volume for December 2019 and that booking pace remains slow through the third quarter of 2021. She noted that there was an increase in bookings for the U.S. market between November and December, which indicates that people are booking closer to their travel dates.

Ms. Chun reported that there were very few bookings for Japan in December. She noted that the booking pace for the first three quarters of 2021 remains slow. She added that there were a number of cancellations for the month of December, which is reflective of the current situation in Japan.

Ms. Chun reported that there was little movement for Canada in December and not much movement in the first three quarters of 2021. Ms. Chun said that there was little movement for Australia in December and not much movement in the first three quarters of 2021.

Ms. Chun reported that O'ahu bookings are dominated by the U.S. market. She said that Maui bookings are likewise dominated by the U.S., with a few more bookings from Canada. She noted that there is very little activity for Moloka'i and Lāna'i. She added that more people are intending to travel to Kaua'i in December. Ms. Chun said that Hawai'i Island



bookings are also dominated by the U.S. market. She noted that booking pace for 2021 continues to be slow. She added that these reports are updated weekly and posted on the HTA website.

Chair Sanders invited the public to provide testimony, and there was none.

**5. 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:**

Chair Sanders recognized Jay Talwar of HVCB to present an update on market insights and marketing campaigns. Mr. Talwar reported that U.S. travel sentiment remains low with 56.9% of survey participants saying that they would feel somewhat or very unsafe traveling on a commercial airline. He added that one-third of respondents said that they will not travel until fall of 2021. Mr. Talwar noted that 50.7% of respondents are more comfortable flying if a COVID-19 pre-test is required before a flight, and 60% feel safer if passengers are required to get the vaccine before traveling. He said that people are more comfortable with regional travel as opposed to long haul travel. Mr. Talwar added that the airlines are preparing for a soft January 2021.

Mr. Talwar reported that the Kuleana health and safety video has performed well on social media. He said that the It's Time video has also performed well in the four major West Coast markets. He added that HVCB has created a Mindful Traveler Guide on Instagram. Mr. Talwar said that HVCB has continued its digital marketing campaign in key markets and with key publications.

Mr. Talwar reported that the Mālama Hawai'i Program has over 68 hotel properties offering free nights. He noted that the offers are valid through the end of 2021. He said that HVCB's airline and hotel partners are doing a great job of promoting the program. He added that the Mālama Hawai'i Program has garnered earned media coverage in publications like Forbes, Lonely Planet, Travel & Leisure, Frommers, and local media.

Mr. Talwar reported that the plan for 2021 is to remain engaged with residents' position on tourism. He said that the target audience remains the avid explorer who is mindful, responsible, and respectful. He noted that HVCB will continue to improve its knowledge on how to effectively communicate with avid explorers through targeted paid and earned media.

Mr. Talwar reported that media consumption has changed during COVID-19 and that it will continue to evolve post-vaccine. He noted that adults spend half of their day connected to



media and that smart phone usage is up 55%. He added that streaming subscriptions will continue to increase post-COVID, which will place a greater emphasis on earned media through content such as Netflix's Somebody Feed Phil Hawai'i episode. Mr. Talwar said that digital ad spending exceeded traditional ad spending for the first time with mobile advertising dominating two-thirds of the total ad spend. Mr. Talwar played two PGA player vignettes that will run into January and February. He said that HVCB will release its first media flight in the second quarter of 2021 and its second media flight in the third quarter.

Mr. Kam asked how HVCB is building non-profit participation for the Mālama Hawai'i Program. Mr. Talwar responded that Caroline Anderson, HTA Director of Community Enrichment, and Kalani Ka'anā'anā, HTA Director of Hawaiian Culture & Natural Resources, have been helpful connecting HVCB with non-profits. He added that everyone involved is cognizant of maintaining social distancing. He noted that hotels are providing kits so visitors can also work individually.

Mr. Rafter asked about the current status of airline flight volume. Mr. Talwar responded that airlines are chasing yield and have been more nimble than they have ever been. He added that volume will increase as demand increases.

Mr. Atkins asked about the conversion rate of booking under the Mālama Hawai'i Program and how it is contributing to occupancy. Chair Sanders responded that he would be willing to share numbers from Highgate Hotels with the Board, but noted that overall demand is low.

Mr. Atkins said that he believes travelers who book with the program want to have an exchange with local people, which would also be good for social media. Mr. Talwar responded that HVCB is working to bring influencers to Hawai'i to participate in the program and to represent the destination the right way across a wide audience.

Ms. Kimura added that there has been interest from the Japan market for the Mālama Hawai'i Program.

Chair Sanders invited the public to provide testimony, and there was a question. Patrick Blangy asked about the distribution of survey takers across the U.S. Mr. Talwar responded that it is a national sample balanced to population centers.

Representative Richard Onishi asked how often HVCB collects its survey data. Mr. Talwar responded that the surveys are ongoing and fielded every other week. Ms. Chun added that the annual HTA resident sentiment survey will be presented at the December Regular Board meeting.



**6. Presentation and Discussion of the General Japanese Market Updates and Trends of which Could Include the Leisure and Group Segments:**

Chair Sanders recognized Eric Takahata of Hawai'i Tourism Japan (HTJ) to present market updates and trends. Mr. Takahata reported that Japan is still doing a good job containing the pandemic compared to other countries. He discussed the Japanese government's economic stimulus measures. He noted that Japan is reopening slowly and conservatively to inbound traffic from Vietnam, China, Singapore, and Korea.

Mr. Takahata reported that Japanese travelers will not have issues with mask wearing, hand washing, and social distancing. He noted that 31.7% of survey respondents want to travel to Hawai'i between June and December 2021. He added that the numbers would be higher if the 14 day quarantine was lifted for Japanese travelers returning to Japan.

Mr. Takahata reported that the number of flights to Hawai'i from Japan is increasing in December and January. He said that there is also a new airline ZIPAIR starting flights to Hawai'i.

Mr. Takahata reported that there was a smooth transition to the Japan Safe Travels website. He noted that there are 57 trusted testing partners, and HTJ receives new requests from labs and clinics weekly. He said that 50% of the market comes from the Kanto area, which has 34 trusted testing partners. Mr. Takahata added that the airlines have been helpful with communicating procedures. He said that the traveler is reminded about pre-testing when the flight is booked, through email, and at check-in.

Mr. Takahata reported that HTJ continues to engage with the Japanese consumer through the Remote Hawai'i Trip online platform. He said that downloadable content is created every month. He noted that HTJ has been working closely with the Polynesian Voyaging Society, 'Iolani Palace, and Bishop Museum. He added that the content has built-in fundraising mechanisms for the Japanese consumer to donate to the organizations directly. Mr. Takahata said that in November, the He Wa'a He Honua film by the Polynesian Voyaging Society aired in Japan with full subtitles. He noted that all tickets sold out in theaters. Mr. Takahata said that in December, the Hawai'i Youth Symphony, held a virtual fundraiser. He added that HTJ will continue to support and facilitate these types of virtual events.

Chair Sanders asked if there has been any progress with the Japanese government ending the 14 day quarantine for returning Japanese travelers. Mr. Takahata responded that the Counsel General has said that there has been movement in piloting a two week trial period allowing Japanese travelers to return to Japan without a 14 day quarantine.

Sherry Menor-McNamara asked what challenges prevent the Japanese government from ending the 14 day quarantines. Mr. Takahata responded that it is difficult to carve out special exceptions for Hawai'i because Hawai'i is part of the U.S.



Ms. Kimura asked how many travelers have arrived with trusted travel partner forms. Mr. Takahata responded that upwards of 85% had trusted travel forms.

Chair Sanders invited the public to provide testimony, and there was a question. Michael Takayama asked about current flight load factors and projected load factors moving forward. Mr. Takahata responded that HTJ can provide those numbers.

Rep. Onishi asked about the Japanese government's plans for a vaccine rollout and whether that will increase potential travel. Mr. Takahata responded that HTJ will compile a report on Japan's vaccine rollout plan and present it to the Board.

**7. Adjournment:**

The meeting adjourned at 12:29 a.m.

Respectfully submitted,

*Reyn S.P. Ono*

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Reyn S.P. Ono  
Recorder

## **Agenda Item #3:**

Presentation and discussion of the travel agents booking pace and general market research trends

# TRAVEL AGENCY BOOKING TRENDS

JANUARY 11, 2021

HAWAII TOURISM  
AUTHORITY

# Global Agency Pro

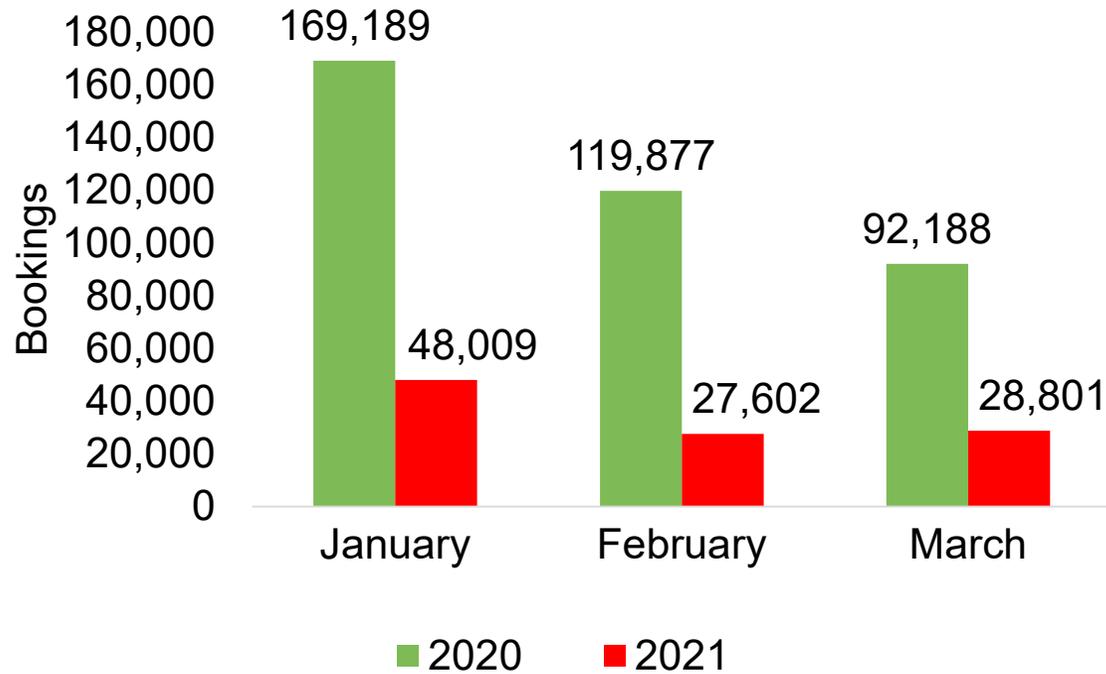
- HTA subscribes to Global Agency Pro, an online travel distribution system consisting of Travel Agency data
- Global Agency Pro provides access to over 90% of the world's Travel Agency airline transactions
- The database consists of five years of historical ticketing data and one year of advance purchase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

# Global Agency Pro Index

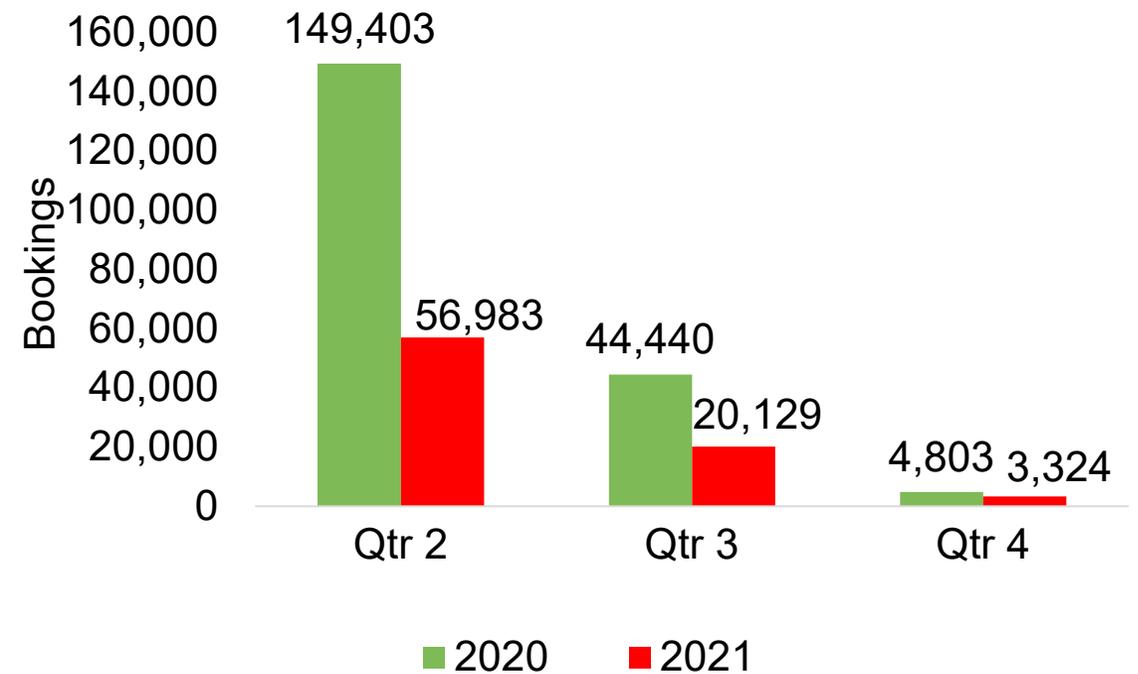
- **Bookings**
  - Net sum of the number of visitors (i.e., excluding Hawai'i residents and inter-island travelers) from Sales transactions counted, including Exchanges and Refunds.
  - Booking Date
  - The date on which the ticket was purchased by the passenger. Also known as the Sales Date
- **Travel 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, 2021 vs 2020 by Month



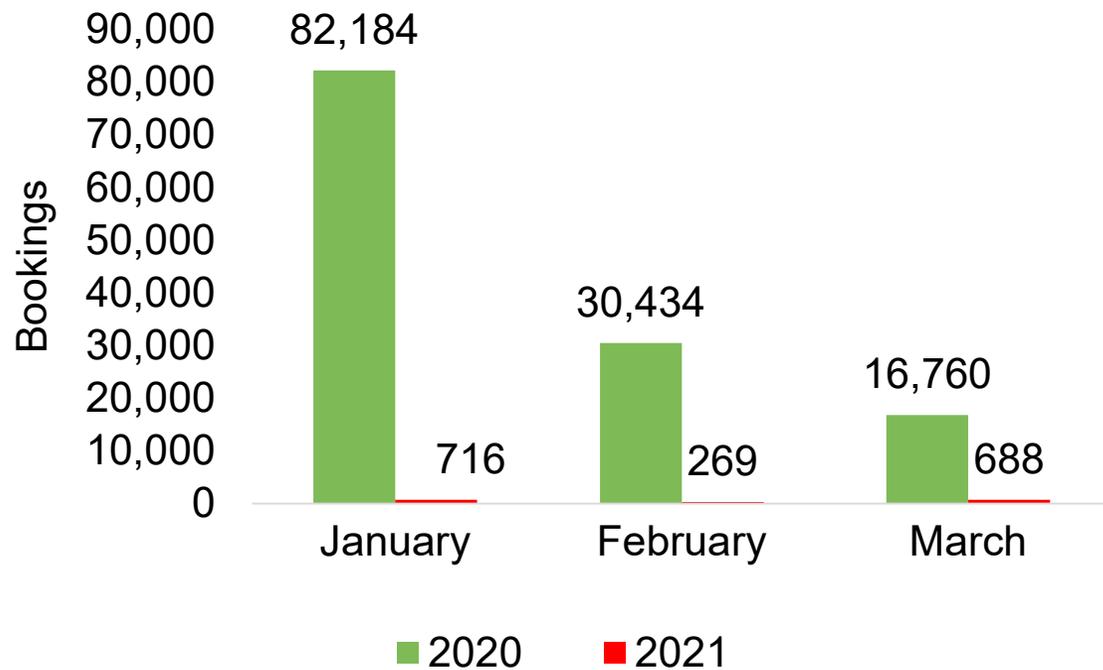
### Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 by Quarter



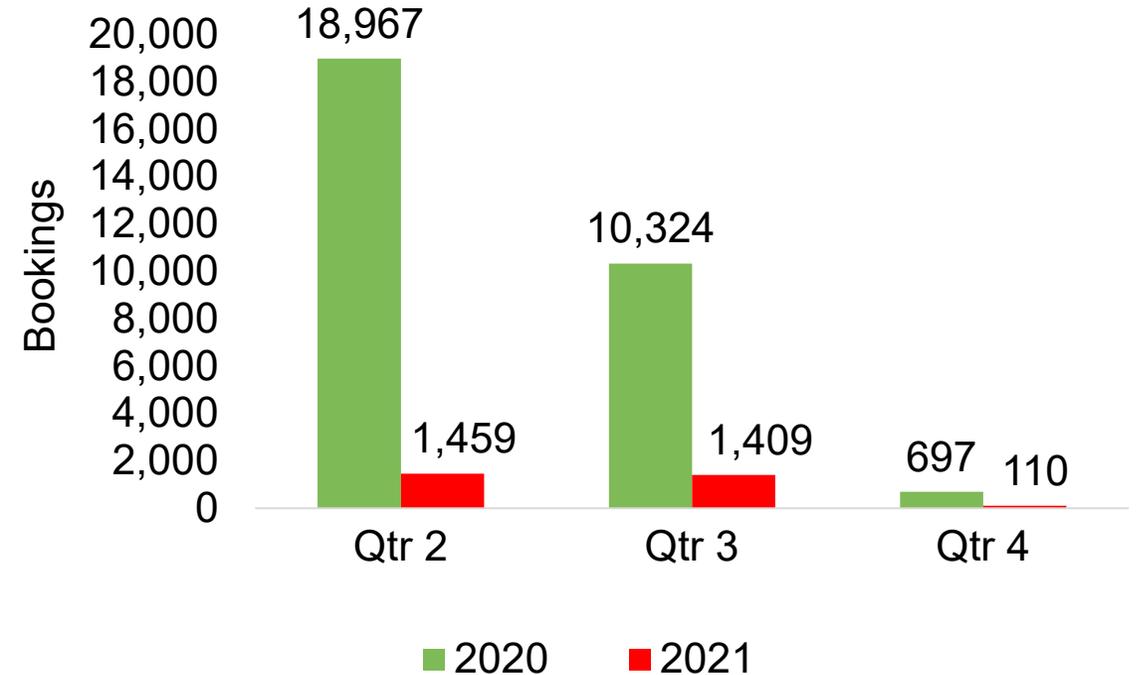
Source: Global Agency Pro as of 01/09/21

# JAPAN

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



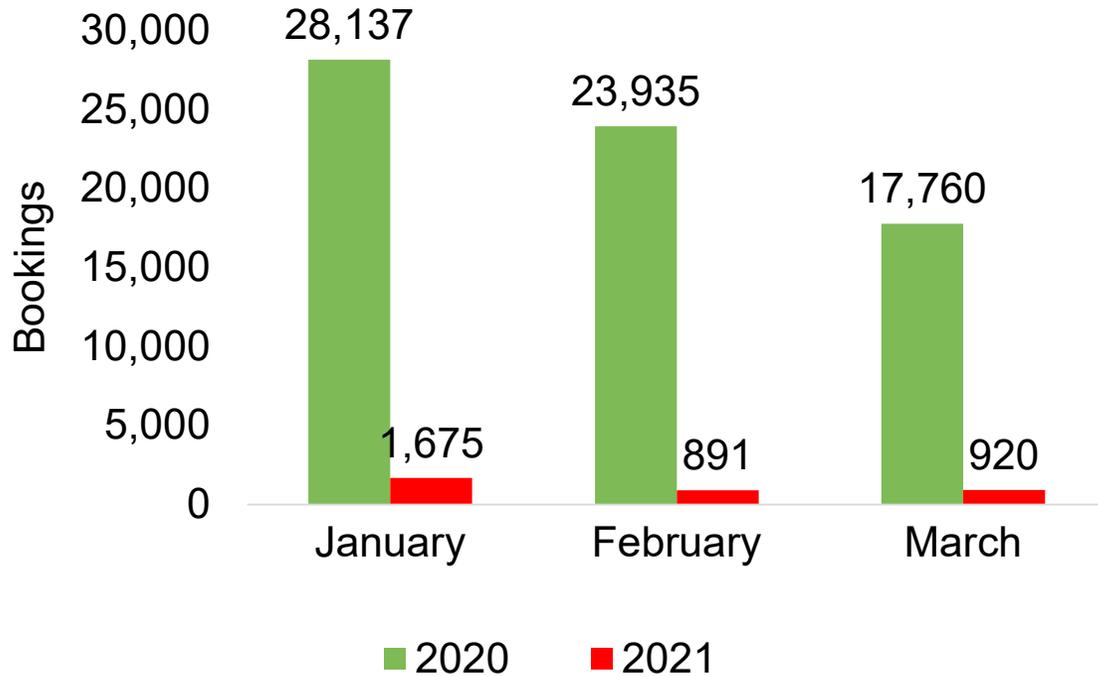
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 by Quarter



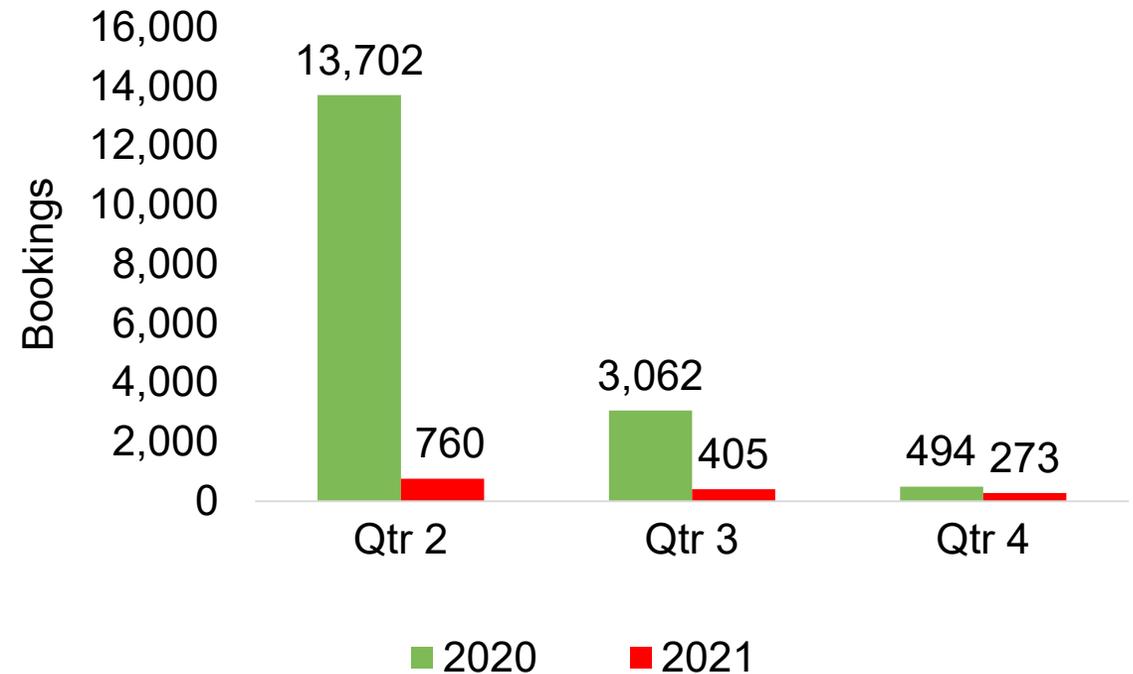
Source: Global Agency Pro as of 01/09/21

# CANADA

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



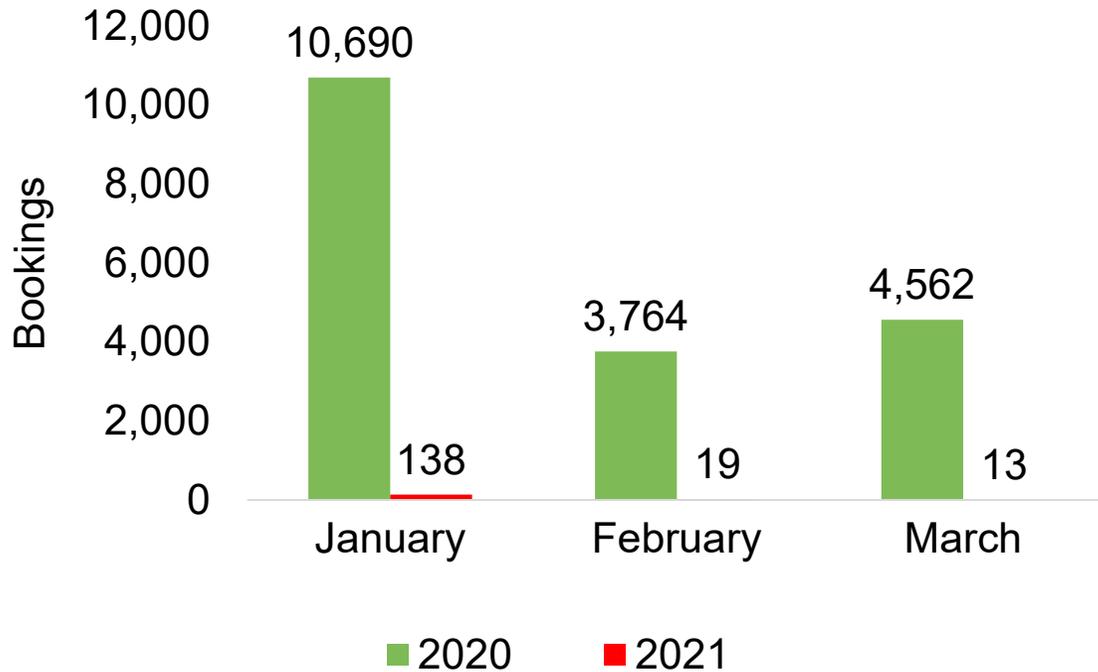
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 by Quarter



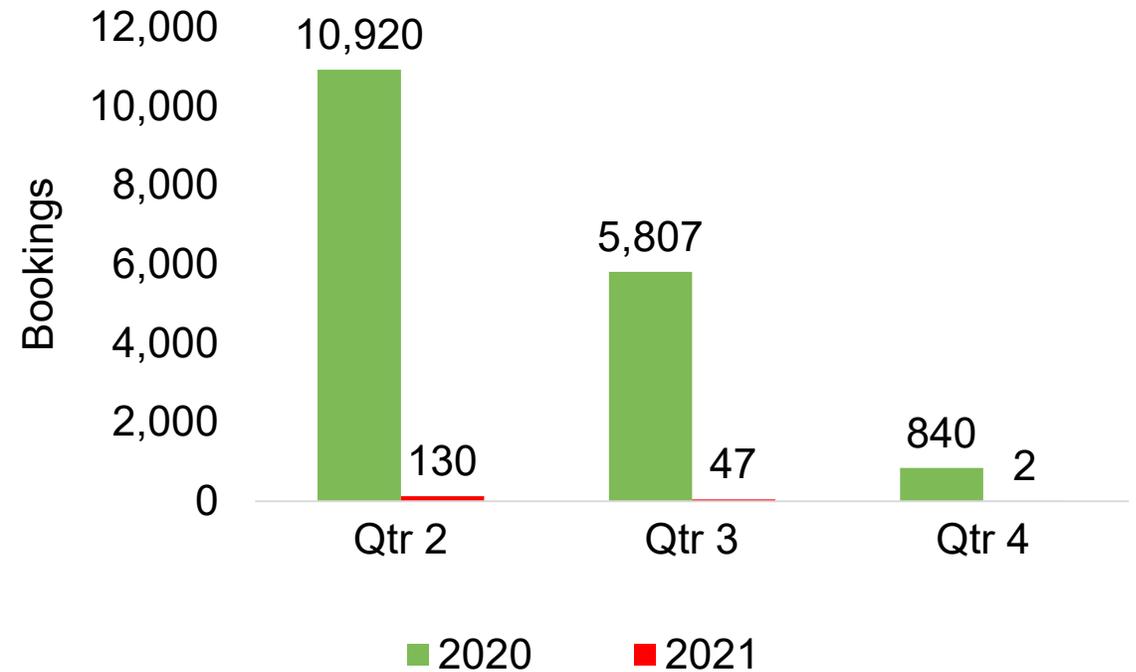
Source: Global Agency Pro as of 01/09/21

# AUSTRALIA

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



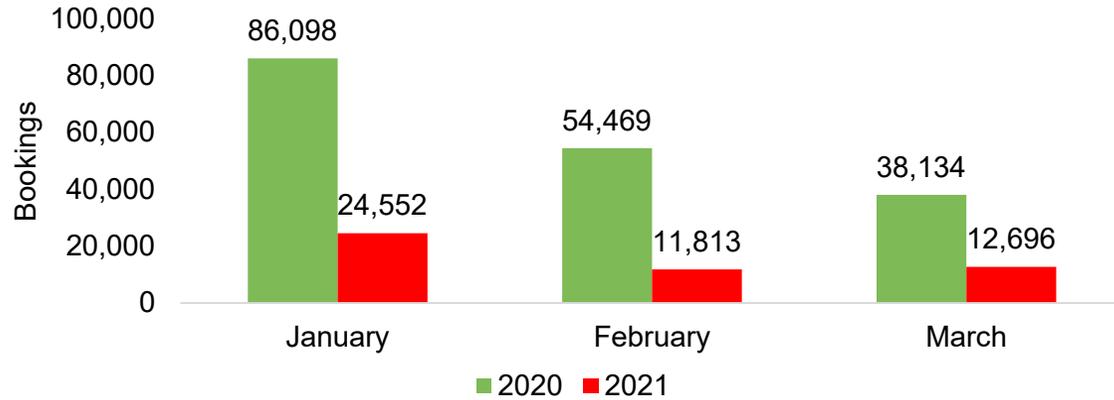
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 by Quarter



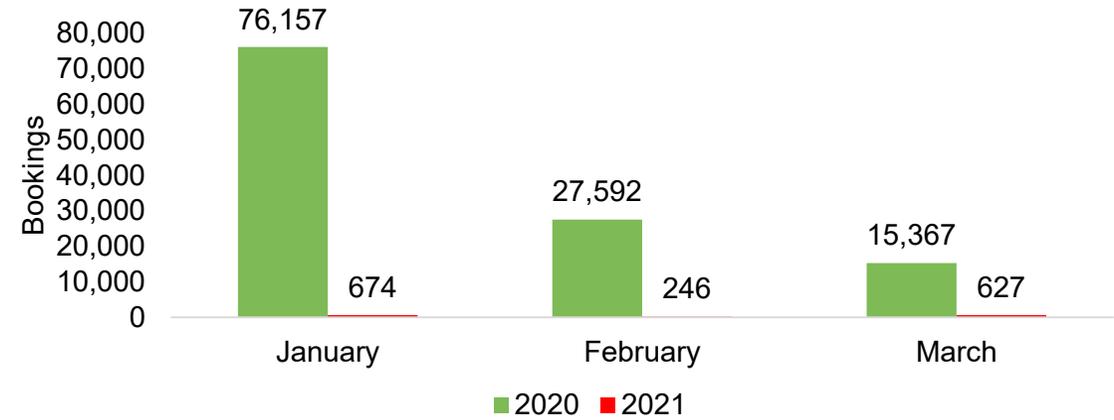
Source: Global Agency Pro as of 01/09/21

# O'ahu by Month 2021

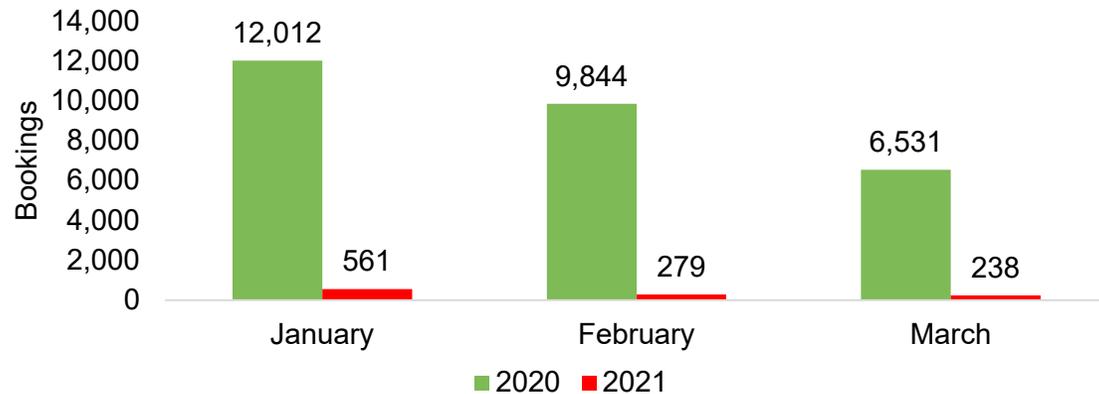
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



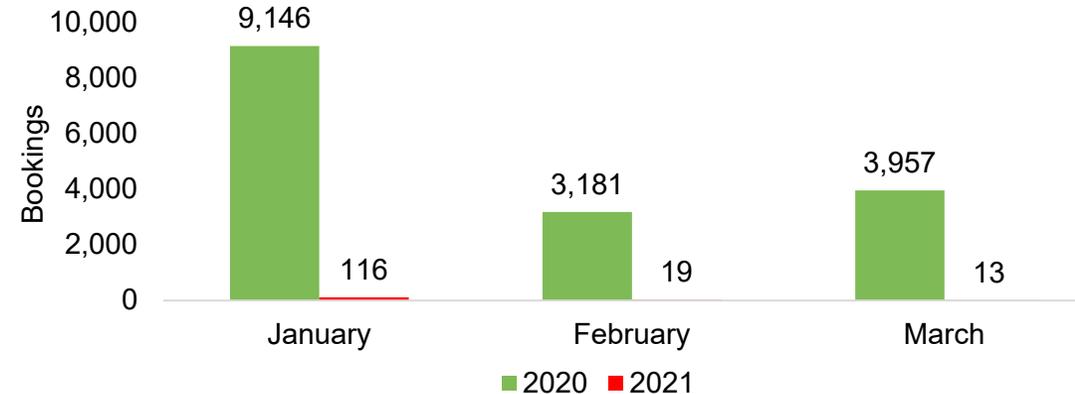
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



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



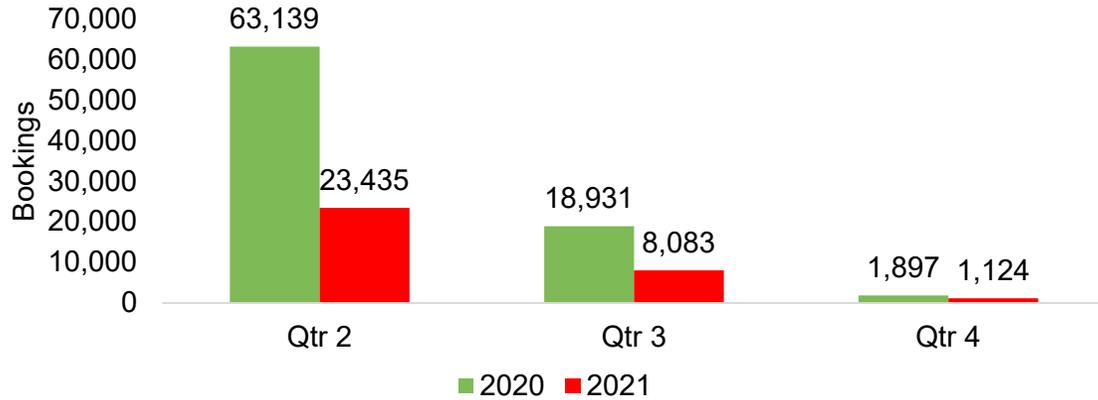
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



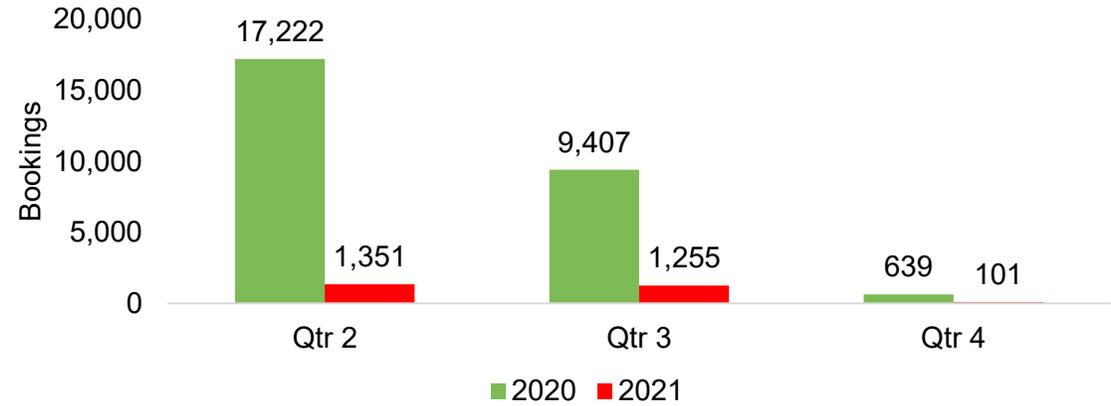
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# O'ahu by Quarter 2021

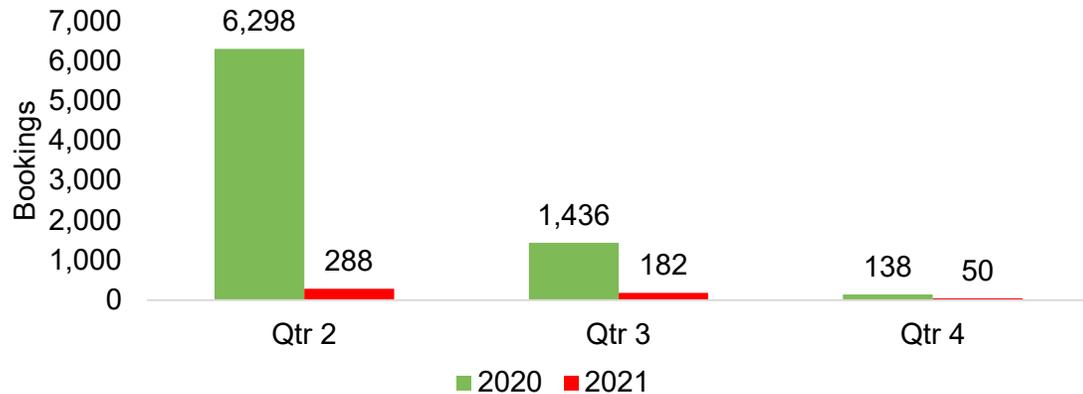
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



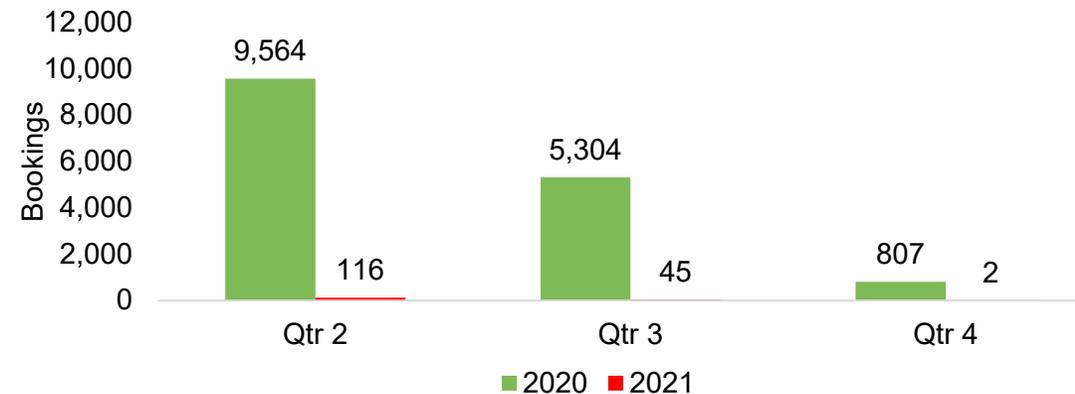
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



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



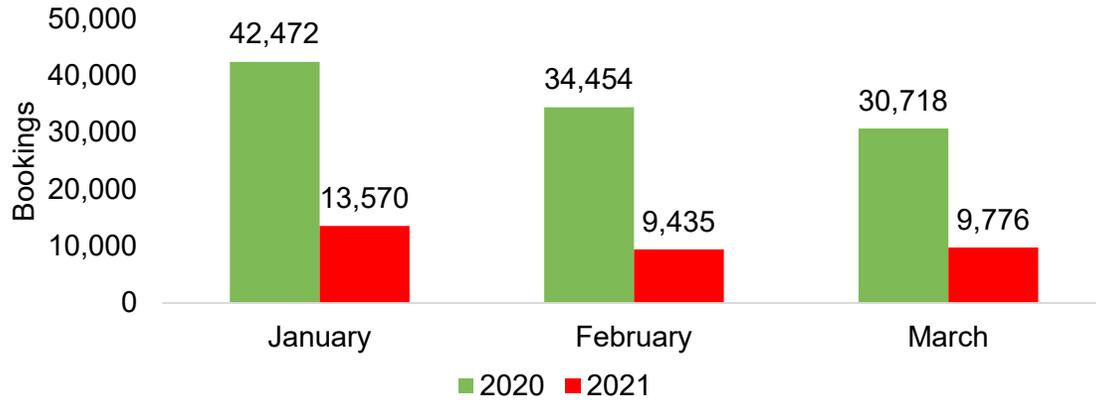
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



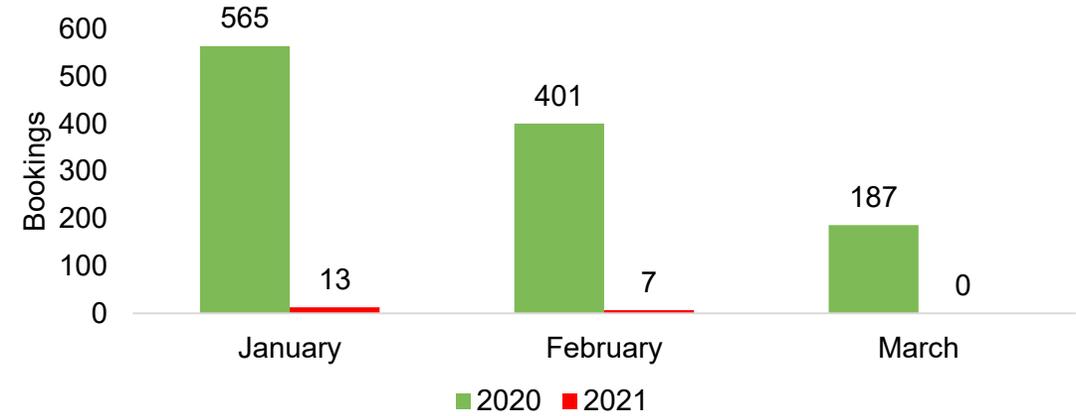
Source: Global Agency Pro as of 01/09/21

# Maui by Month 2021

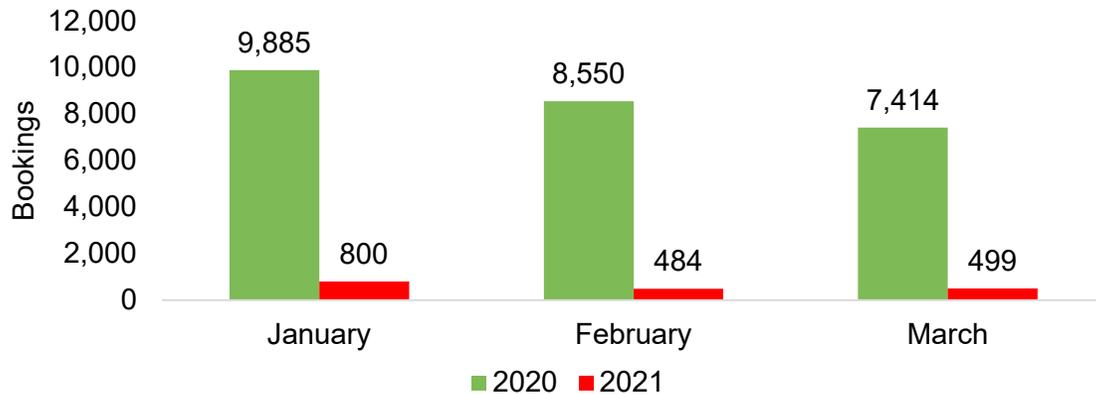
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



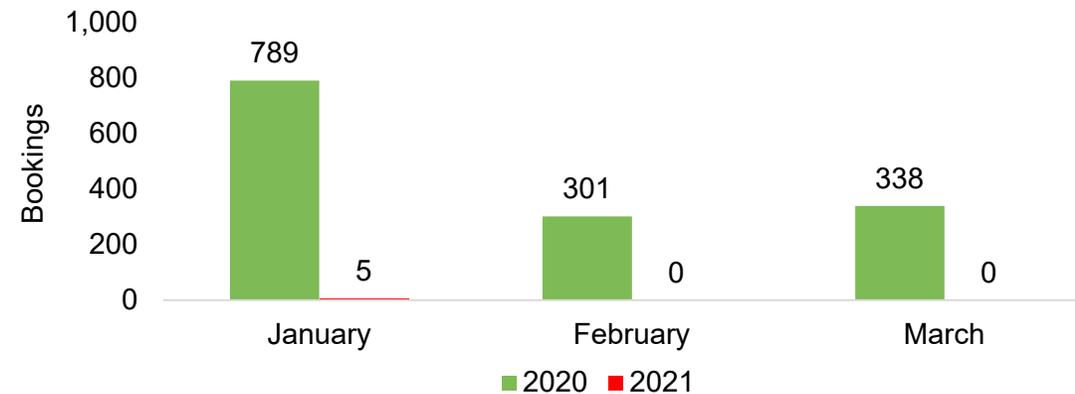
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



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



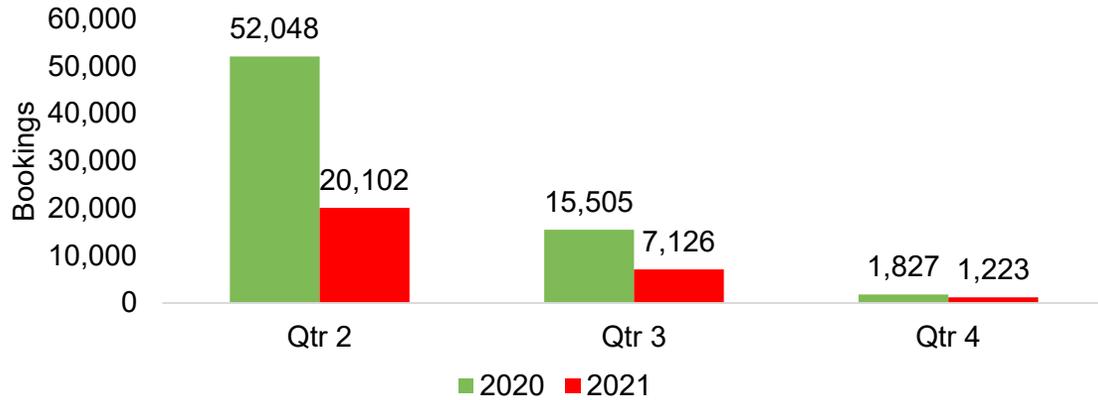
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



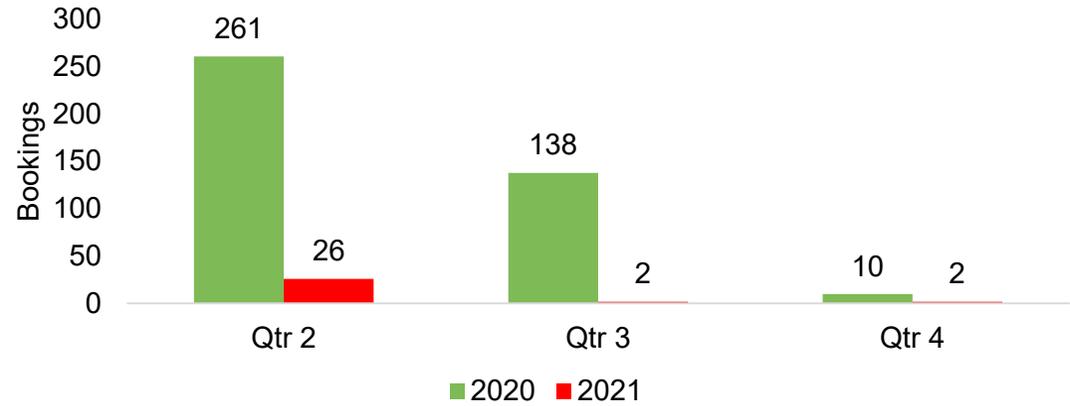
Source: Global Agency Pro as of 01/09/21

# Maui by Quarter 2021

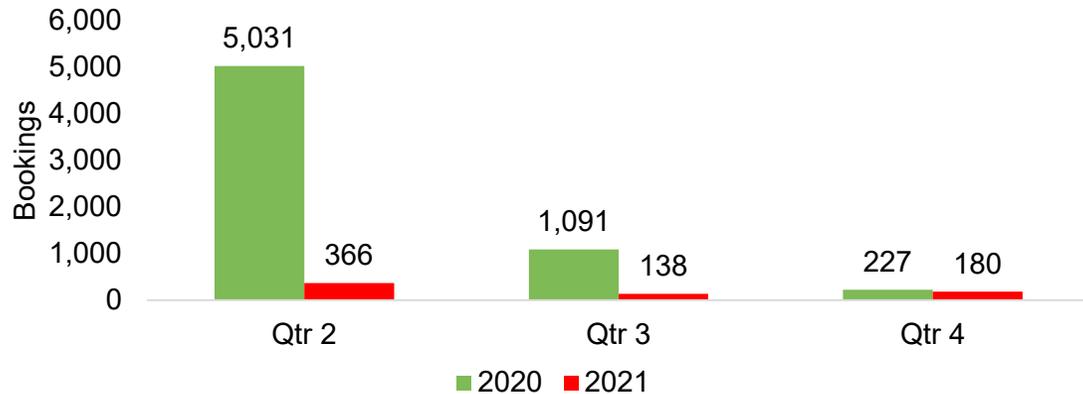
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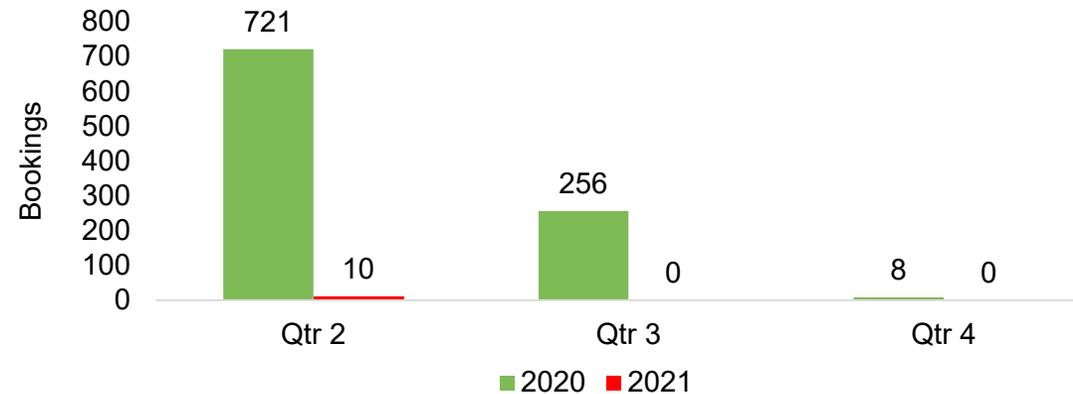
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



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



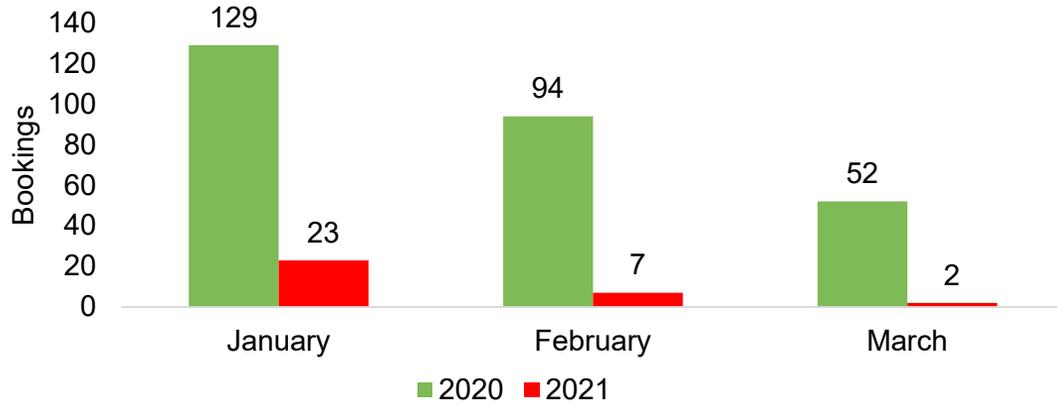
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



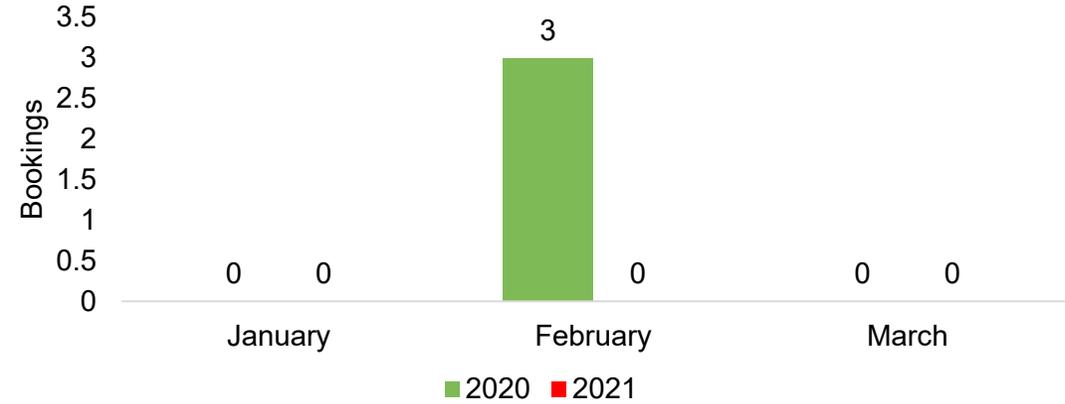
Source: Global Agency Pro as of 01/09/21

# Moloka'i by Month 2021

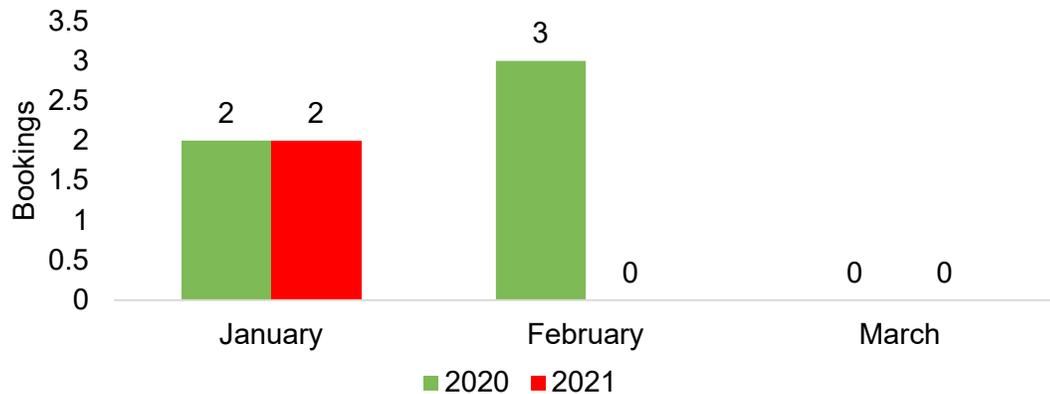
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



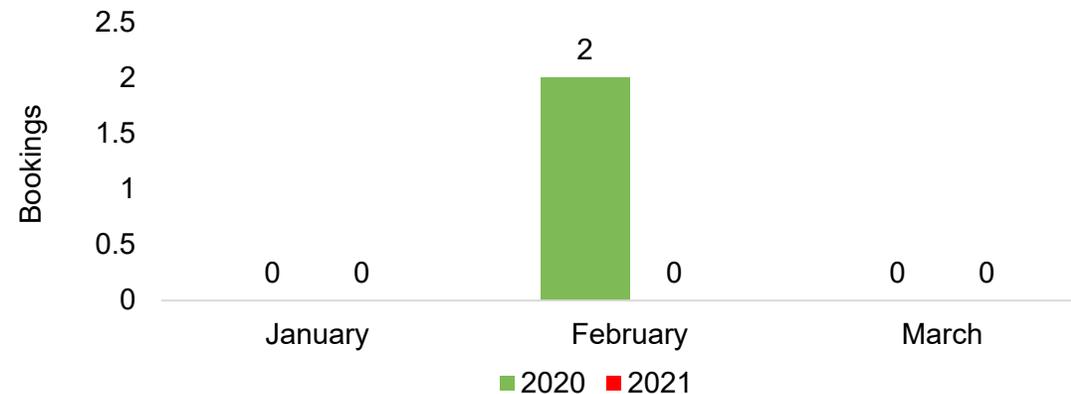
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



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



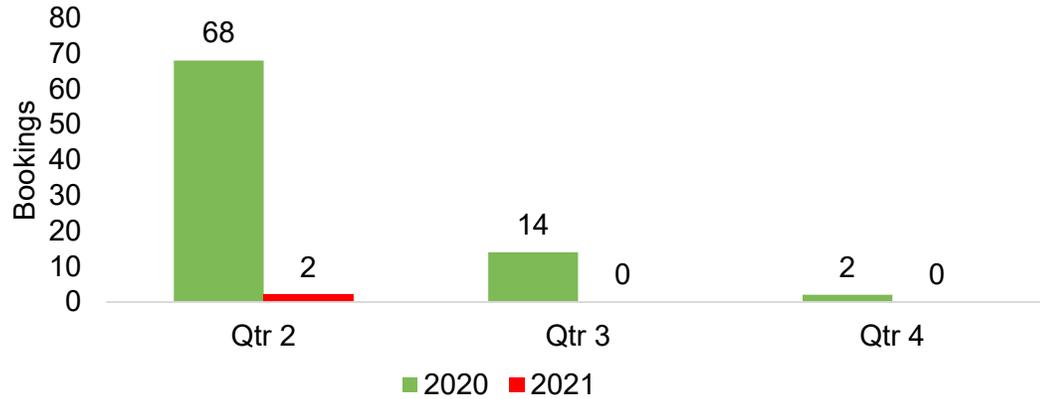
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



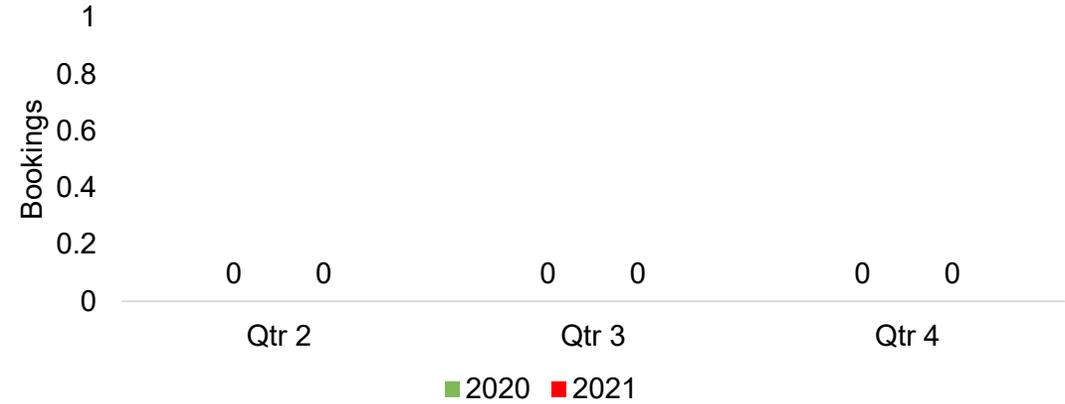
Source: Global Agency Pro as of 01/09/21

# Moloka'i by Quarter 2021

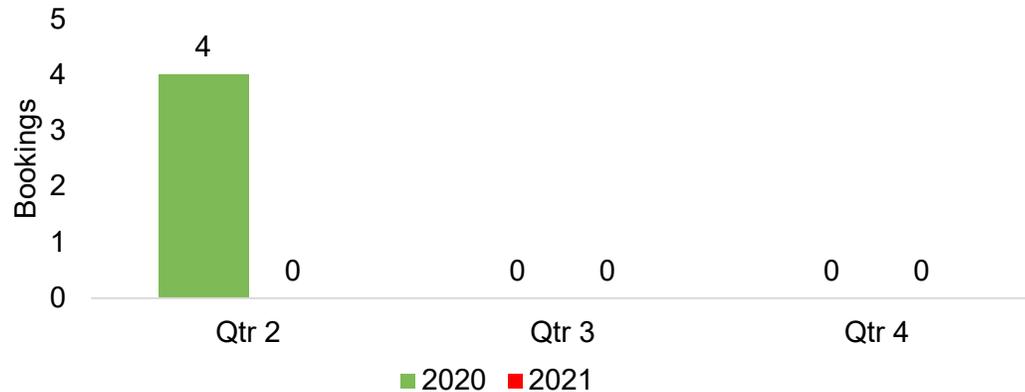
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



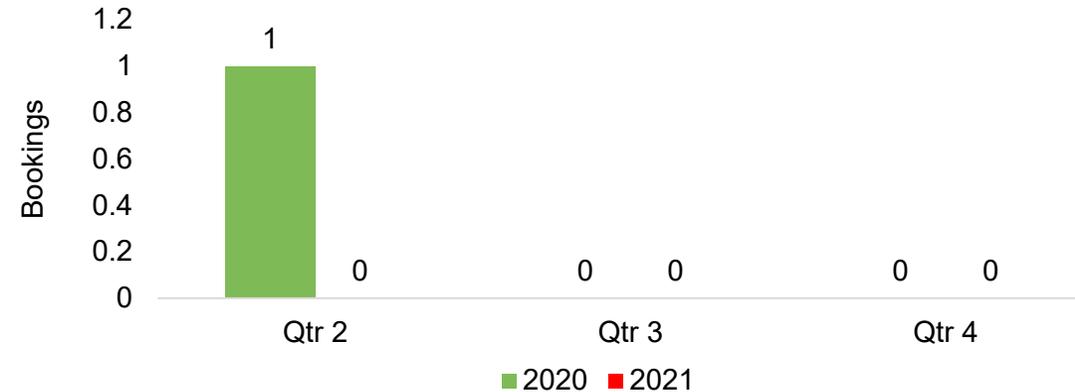
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



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



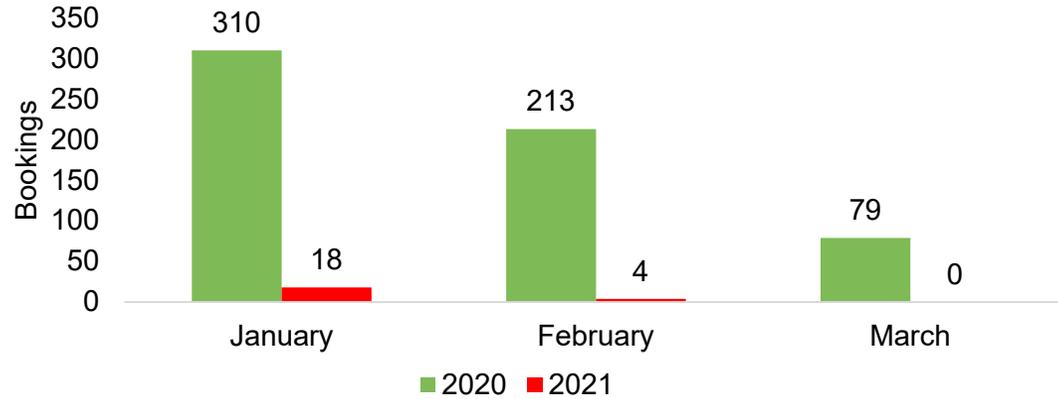
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



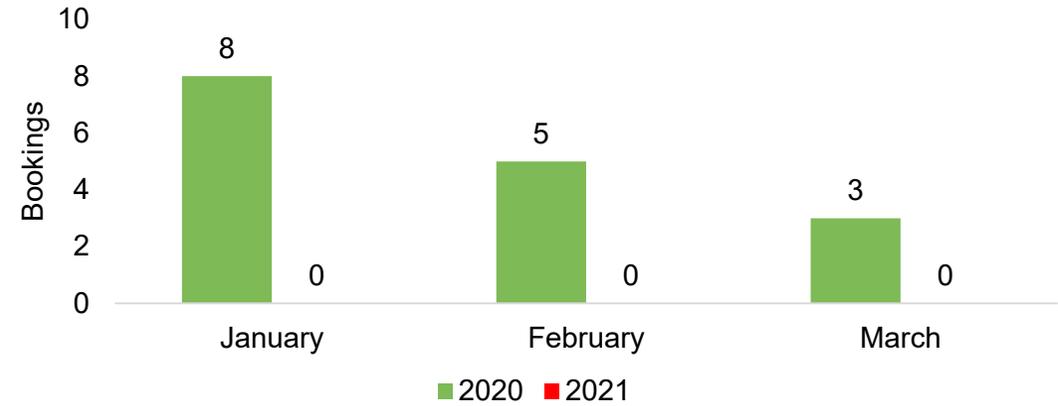
Source: Global Agency Pro as of 01/09/21

# Lānaʻi by Month 2021

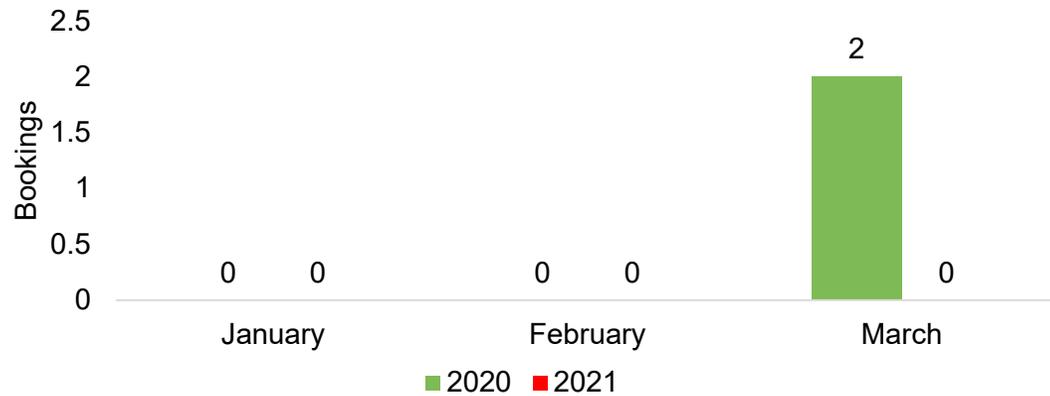
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



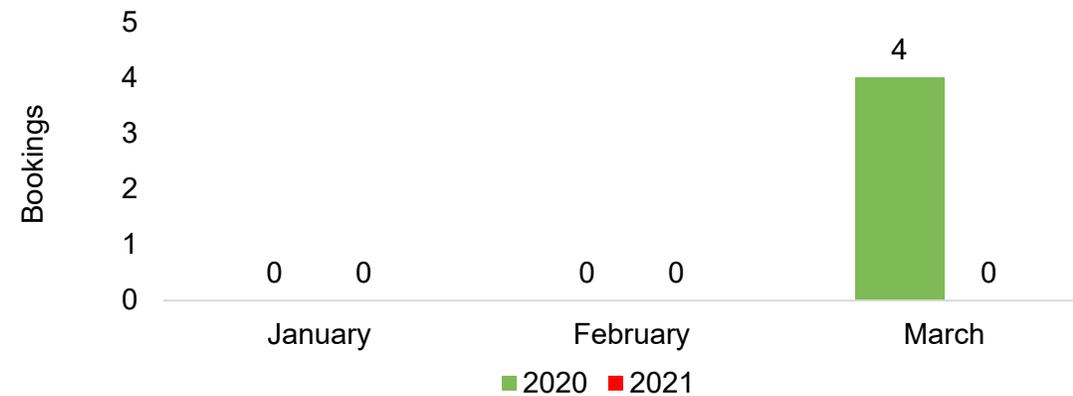
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



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



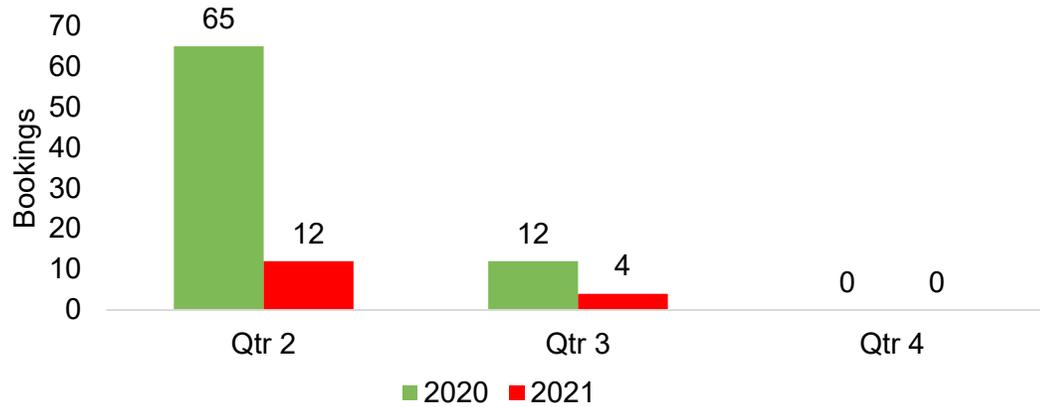
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



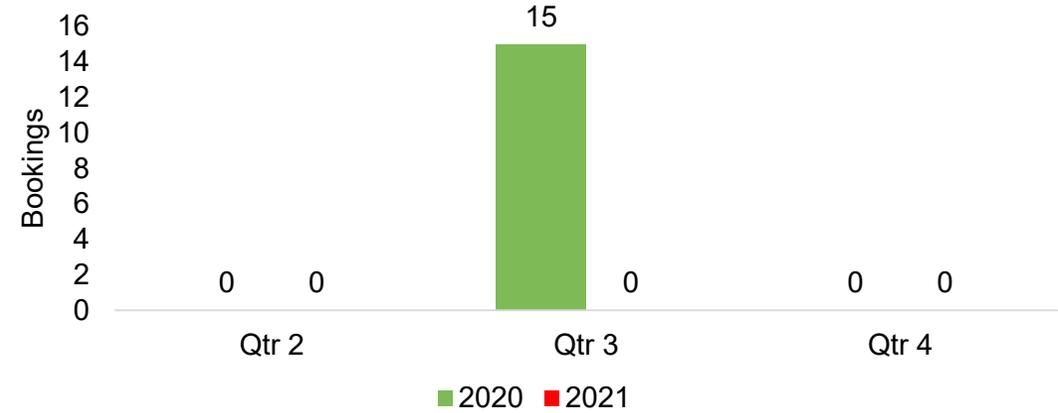
Source: Global Agency Pro as of 01/09/21

# Lānaʻi by Quarter 2021

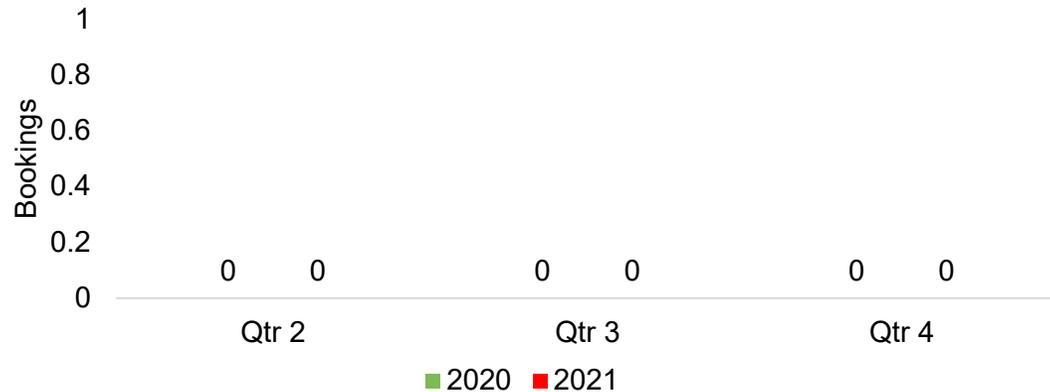
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



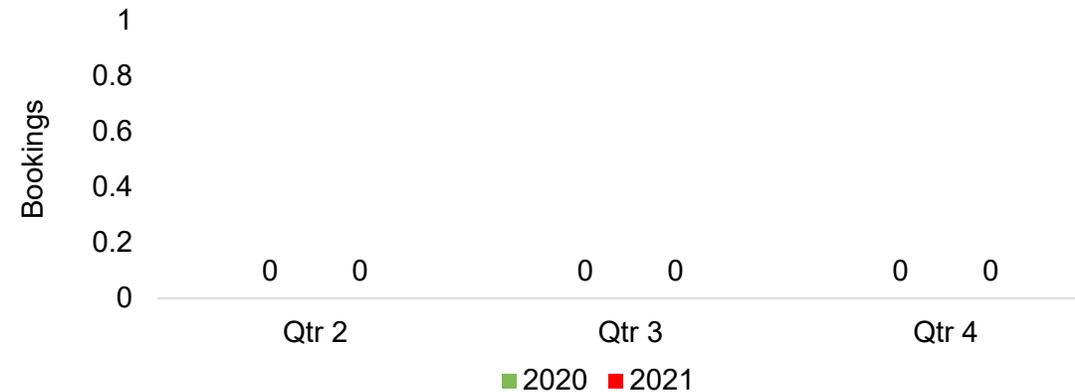
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



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



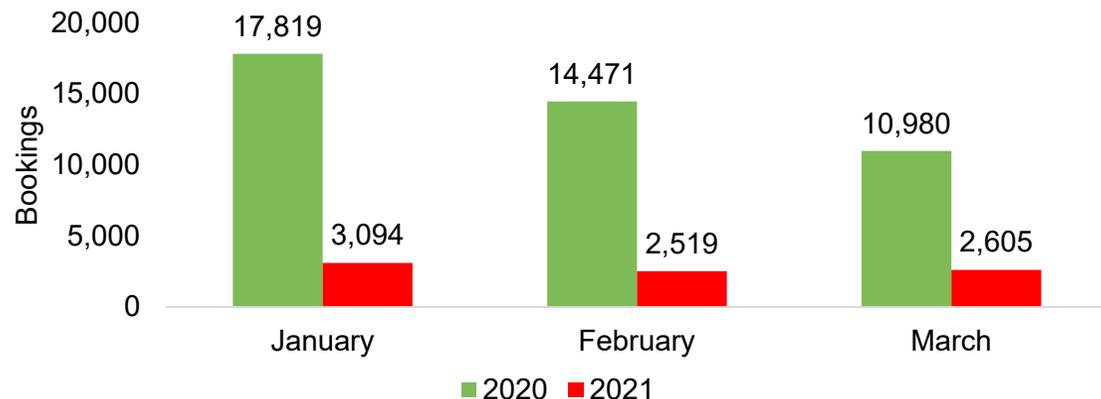
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



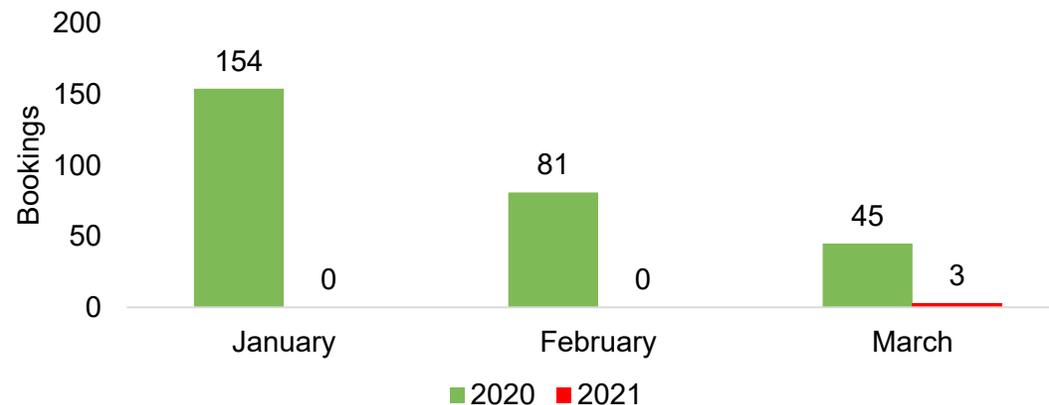
Source: Global Agency Pro as of 01/09/21

# Kaua'i by Month 2021

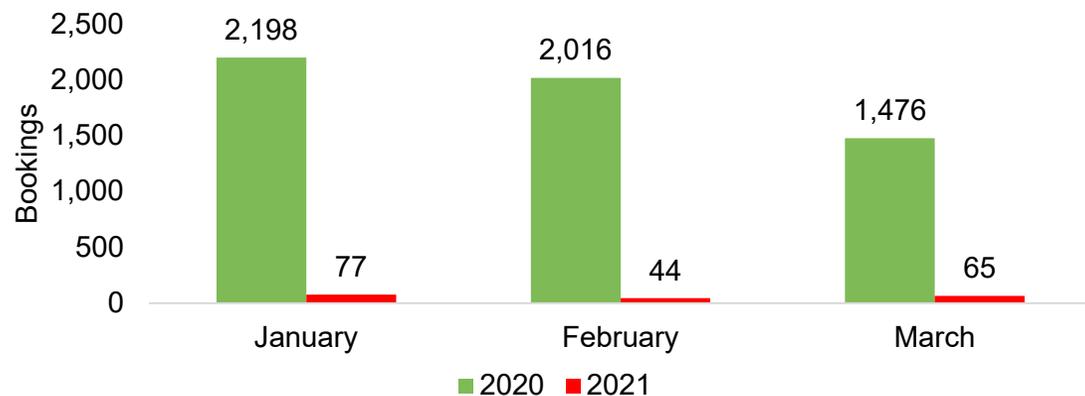
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



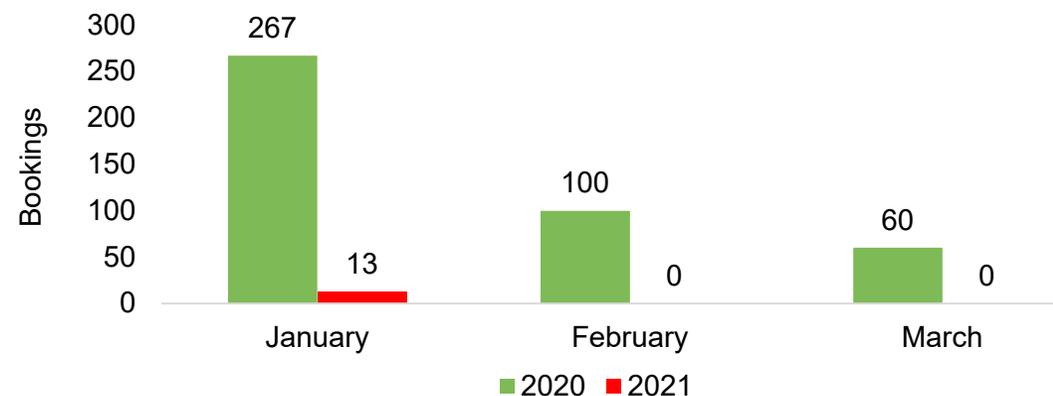
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



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



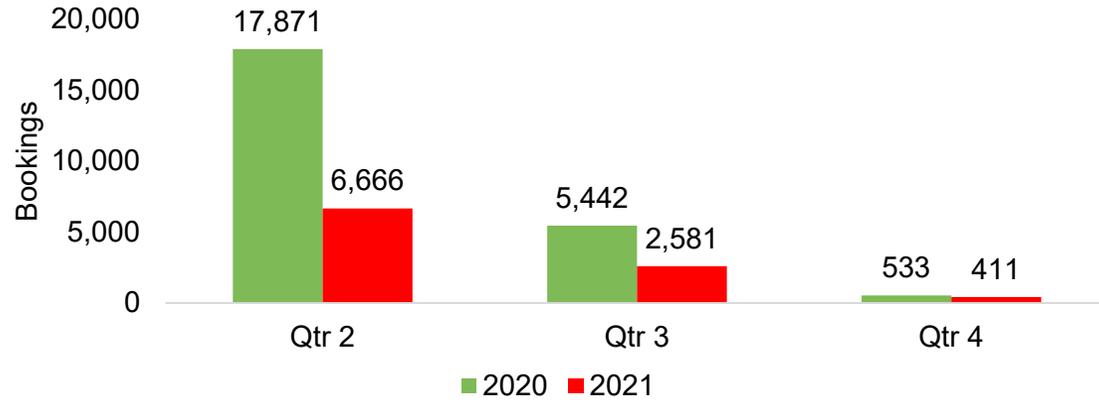
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



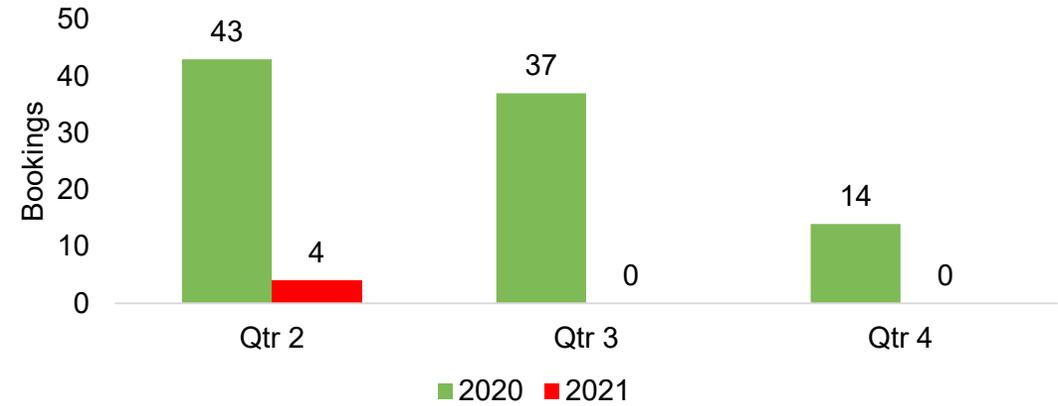
Source: Global Agency Pro as of 01/09/21

# Kaua'i by Quarter 2021

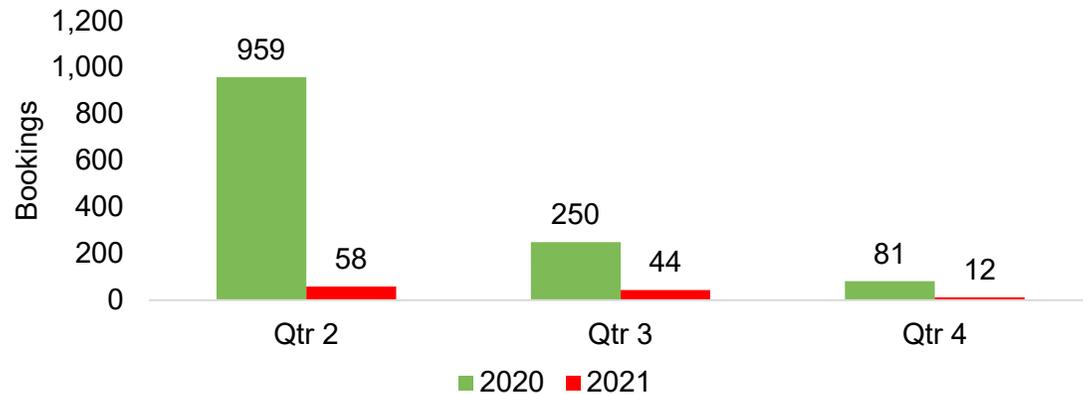
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



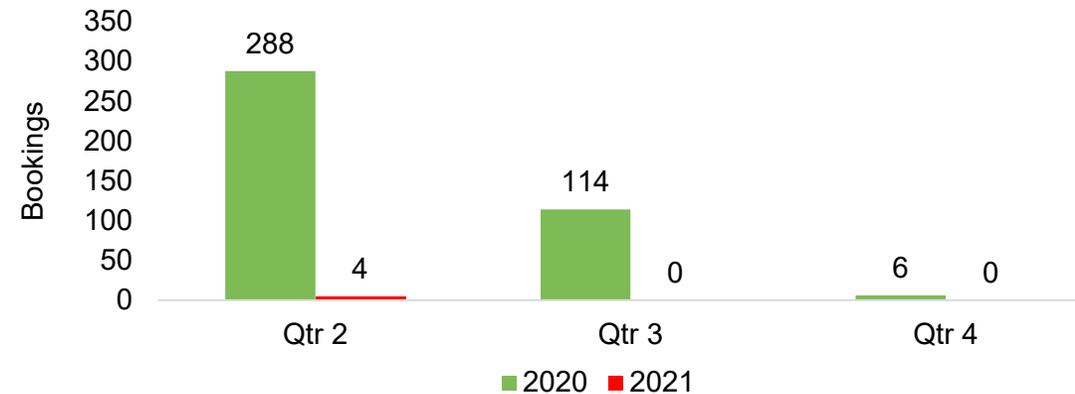
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



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



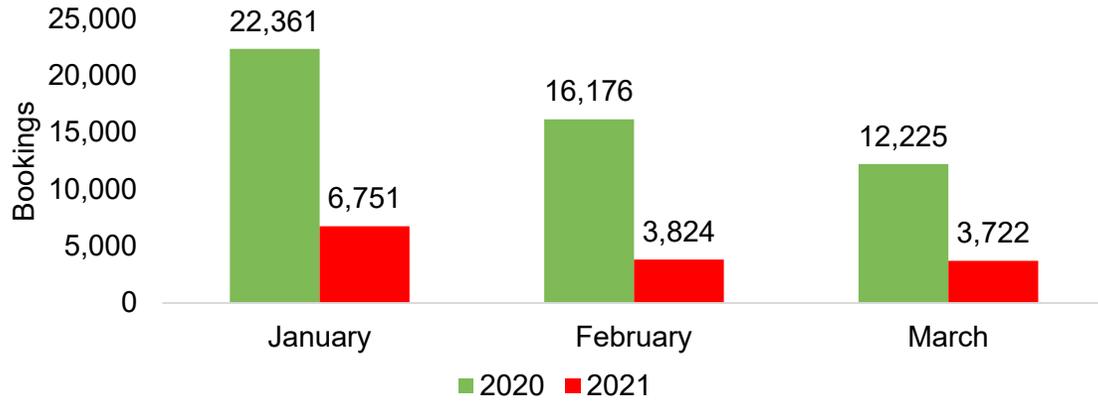
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



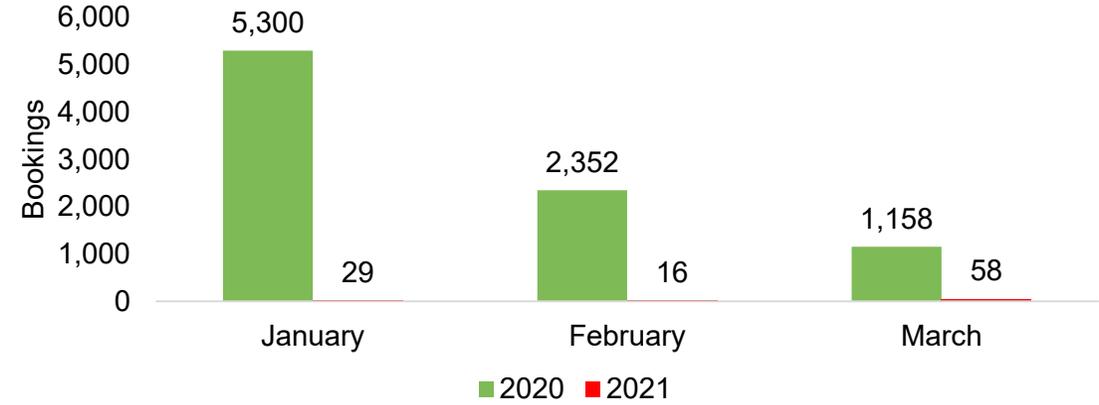
Source: Global Agency Pro as of 01/09/21

# Hawai'i Island by Month 2021

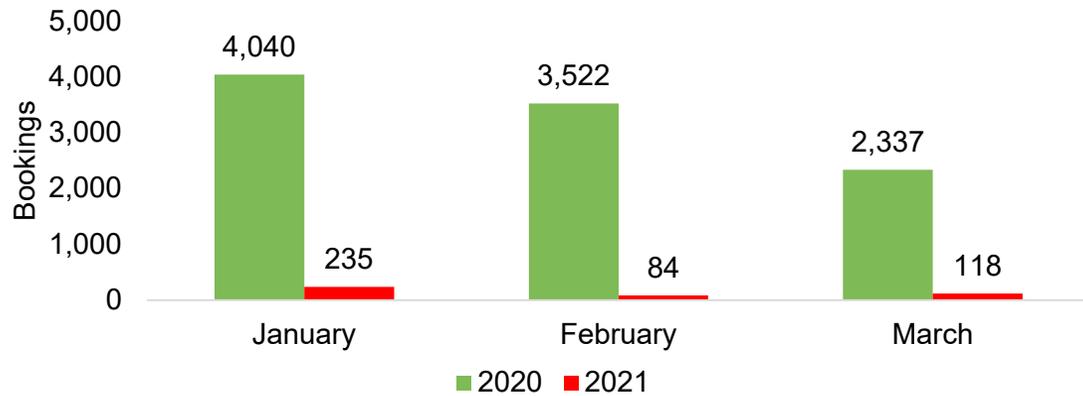
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



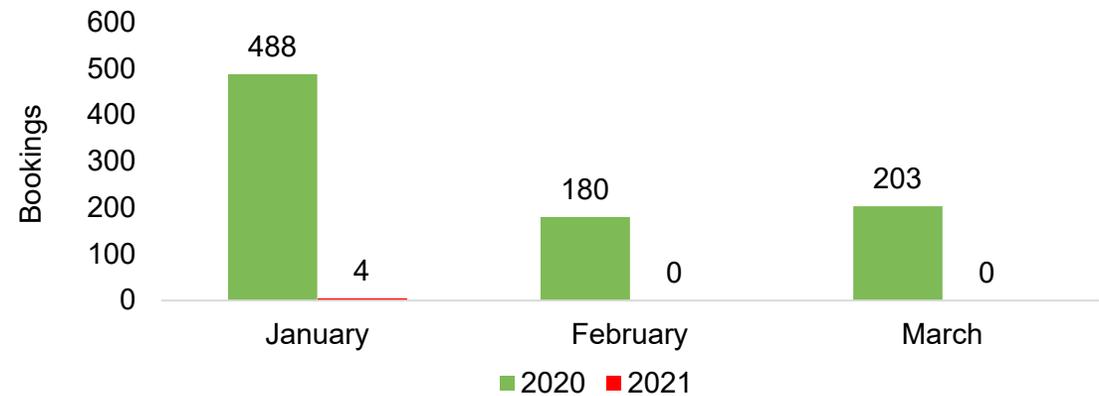
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



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



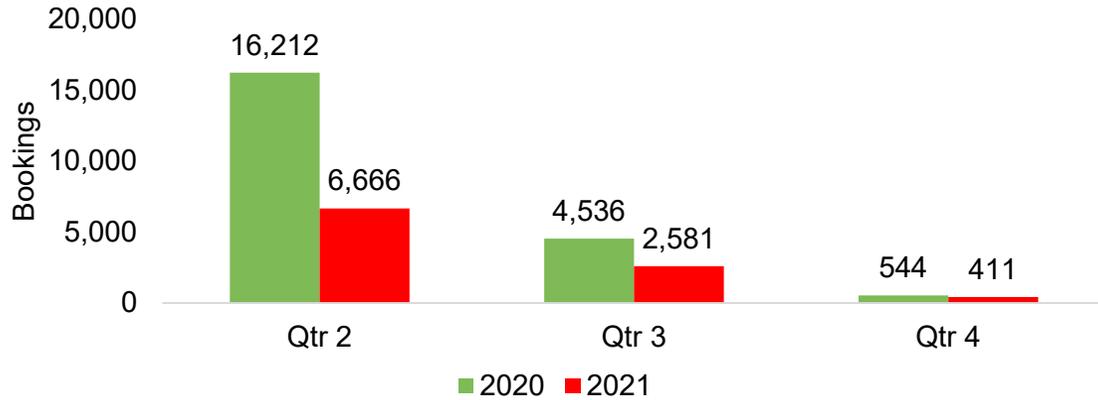
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Australia



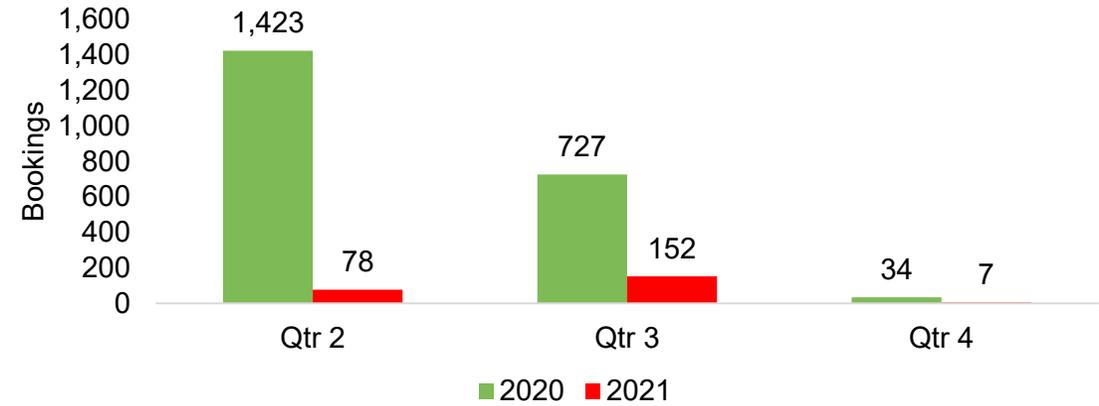
Source: Global Agency Pro as of 01/09/21

# Hawai'i Island by Quarter 2021

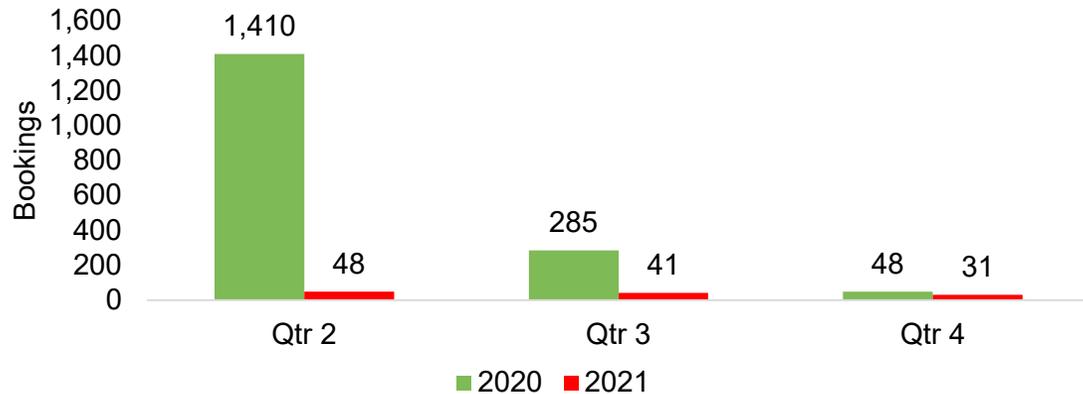
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - U.S.



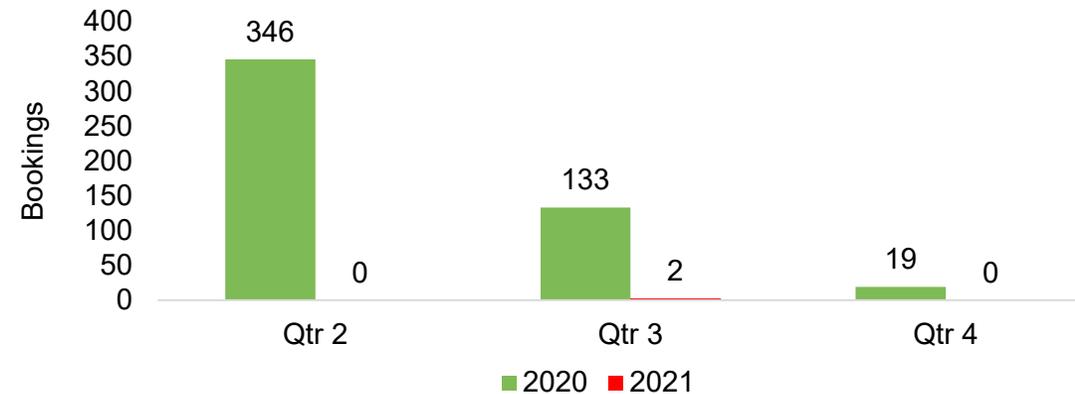
Travel Agency Booking Pace for Future Arrivals, 2021 vs 2020 - Japan



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 01/09/21

## **Agenda Item #4:**

Presentation by Hawai'i Tourism Korea  
regarding the state of and progress of the  
Travel Testing Partners



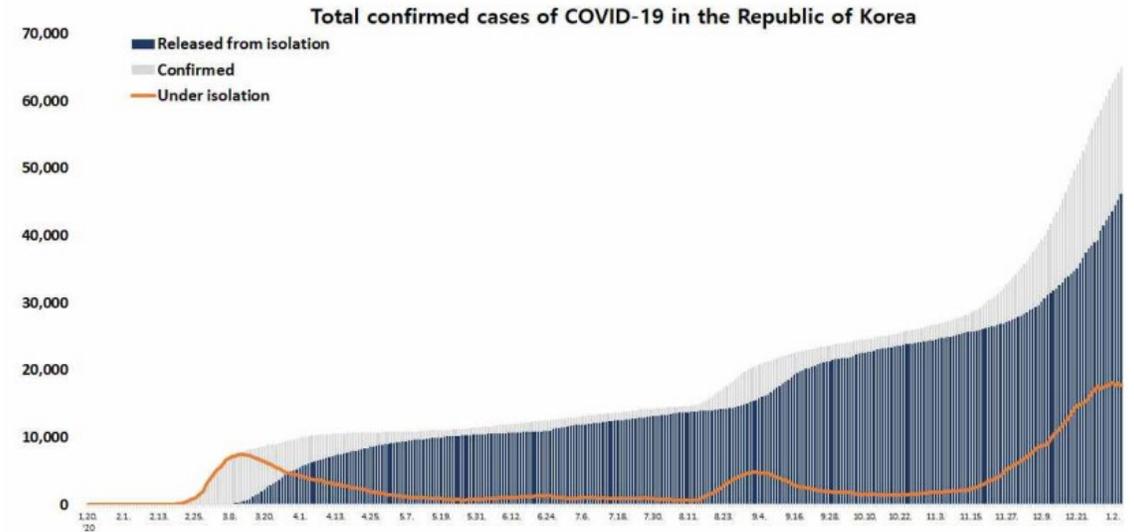
# Korea TTP Program Update

Prepared by Hawai'i Tourism Korea  
January 27, 2021



# Korea COVID-19 Status (as of Jan 27)

- Total number of confirmed cases: **76,429**
- Total number of recovery: **65,478 (85%)**
- Total number of death: **1,378 (1.8%)**



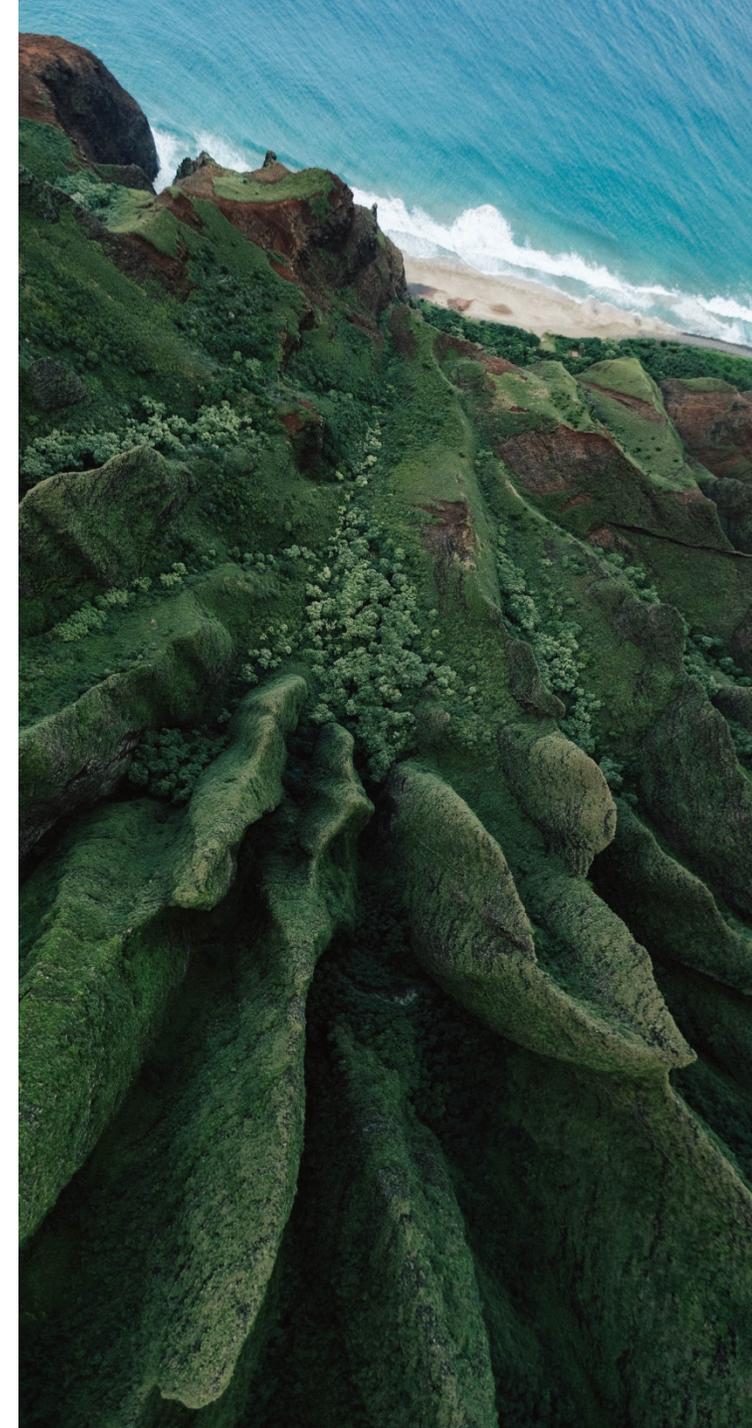
- ✓ Extended the **Level 2.5 distancing** measures **till January 31**
- ✓ **Special travel advisory** for Koreans to avoid non-essential overseas trips **till February 15**
- ✓ Starting January 8, Korea requires PCR test negative proof for all incoming foreign visitors including Korean citizens from UK and South Africa

# Korea Vaccination Status (as of Jan 27)

- Preparing a vaccination management system for the COVID-19 vaccination including reservations and the issue of vaccination certificates
- With secured 20 million doses of the vaccine, government will **begin vaccination** of high-risk groups, front-line medical staff and senior citizens **in February**.
- Will support both drug and vaccination fees so that all people can get the COVID-19 vaccine **free of charge**.
- **List of Vaccines that Korea purchased:**
  - ✓ AstraZeneca
  - ✓ Moderna
  - ✓ Johnson & Johnson's Janssen
  - ✓ Pfizer
  - ✓ COVAX
- Plans to intensively implement the vaccination **during Q3 2021** to form a "collective immunity".

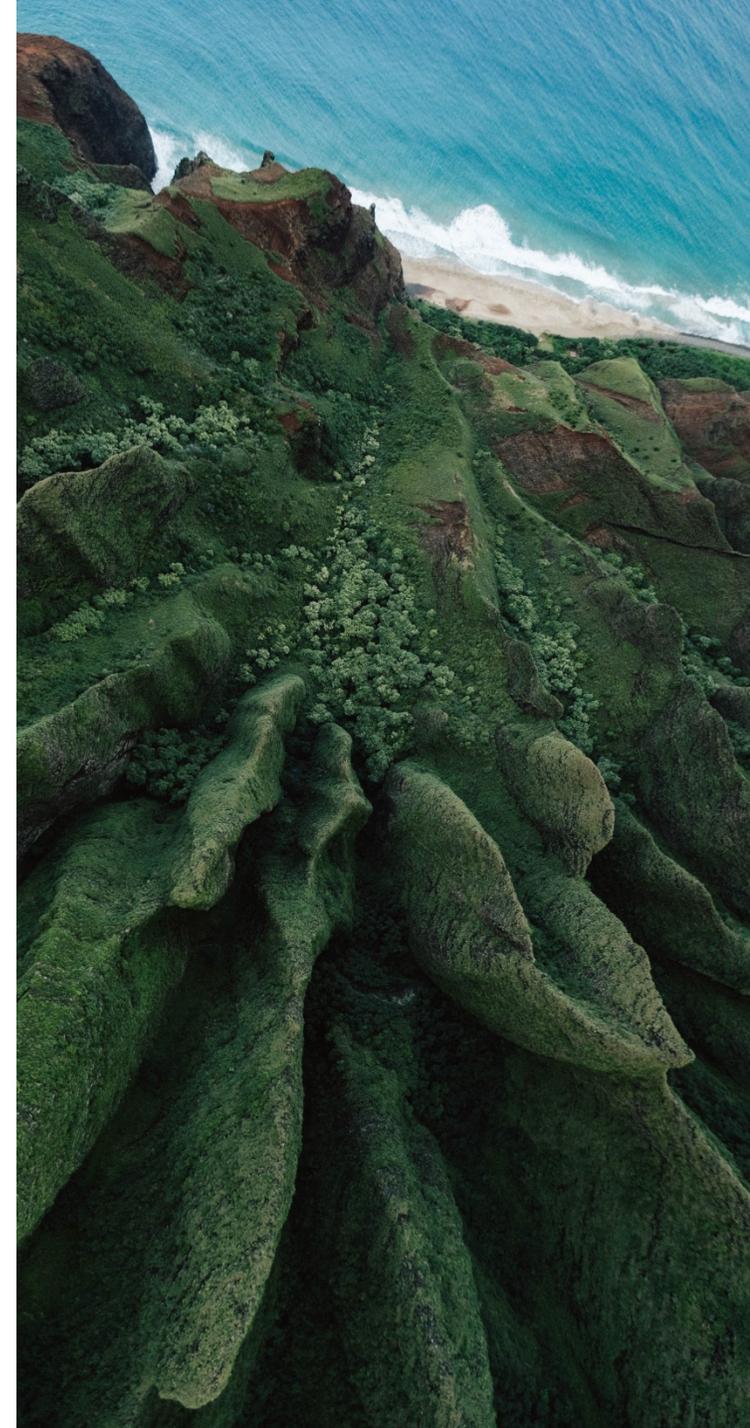
# Travel Trade Update

- **Korean economy to grow 3.2%.**
- **Major travel agencies started to sell overseas travel products** departing from January 2021 targeting destinations where travelers do not have quarantine and also early-bird products departing after May including Hawai'i.
- **The Ministry of Culture, Sports and Tourism has set aside US\$ 1.37billion for both inbound/outbound tourism in 2021**, up 11.2% from 2020 in order to support the tourism industry which has been hard hit by COVID-19.



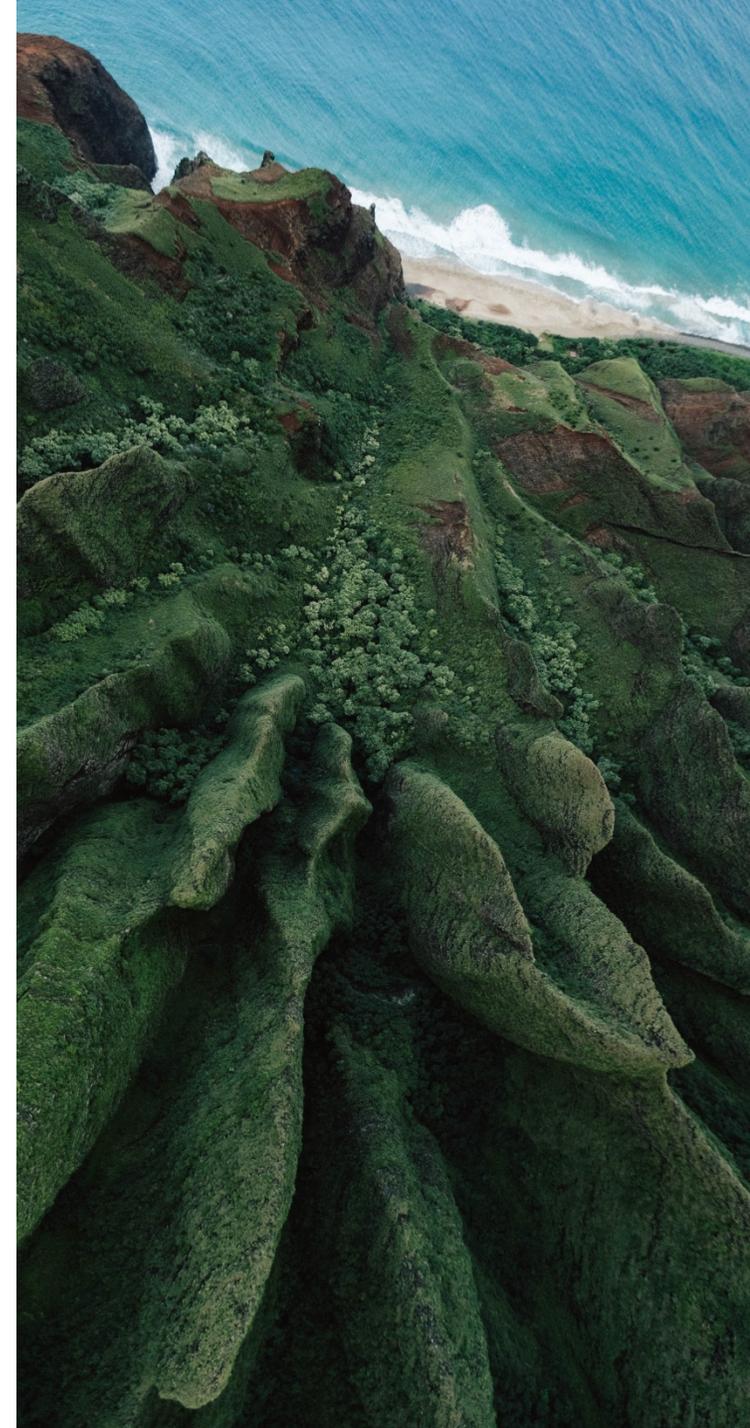
# Consumer & Media Update

- Consumer Survey on travel
  - **70.2% of Koreans would plan to travel abroad** after inoculation.
  - **The most desired leisure activity** when COVID-19 ends is by far **“Travel (69.6%)”** followed by “cultural activity (13.3%)” and “social gathering (13.1%)”.
- **Instagram marked as the most used social networking service** application by Koreans in 2020, surpassing Facebook. Its usage time topped 4.7 billion minutes followed by Facebook (3.9 billion) and Naver Café (2.4 billion).



# Korea Pre-travel testing Program

- Hawai'i will start its pre-travel testing program for COVID-19 in Korean market, enabling travelers to avoid quarantine if they take the test within a 72-hour period prior to their arrival and test negative.
- 4 hospitals in Korea made the agreement of trusted testing partner programs with State of Hawai'i.
  - ✓ **Yonsei University Severance Hospital** (owned by Yonsei University)
  - ✓ **Kangbuk Samsung Hospital** (owned by Samsung Group)
  - ✓ **Inha University Hospital** (owned by Inha University & Korean Air)
  - ✓ **Seoul Asan Medical Center** (owned by Hyundai Group)
- More trusted testing partners will be announced in the coming weeks:
  - ✓ **COVID-19 Test Center at ICN** (operated by Inha University)
  - ✓ **Korea University Hospitals** (owned by Korea University)



# Korea Trusted Testing Partners

- Korea Testing Partner will provide Testing services that are designated by the Korea Disease Control and Prevention Agency.
- Korea Testing Partners will use test kits and medical devices approved by the Ministry of Food and Drug Safety for nucleic acid amplification testing for COVID-19.
- All sample taking must be observed and the sample must be taken within 72 hours from the final leg of departure.

Exhibit C (Sample)  
State of Hawaii Form of Test Result

**State of Hawai'i**  
**Certificate of Testing for COVID-19**  
하와이 주 COVID-19 감염증 검사 결과 증명서

Date of Issue 01 / 03 / 2021  
(발급일자) (Month) (Day) (year)

Name PARK YOUNG SUN  
(성) (Family Name) (이름) (First Name) (Middle Name)

Nationality KOREA Date of Birth 12/11/1951 Passport No. M12345678  
(국적) (생년월일) (여권번호)

Address 100-104, Yongho 1-ro 21beon-gil, Gunpo-si, Gyeonggi-do, Republic of Korea  
(주소)

This is to certify the following result which have been confirmed  
by RT-PCR test negative for COVID-19  
conducted with the sample taken from the above mentioned person.  
상기 신청인으로부터 채취한 검체로  
COVID-19 감염증에 대한 RT-PCR 검사를 시행한 결과  
음성으로 확인되었습니다.

Sample (검체 종류)	Date and Time (날짜 및 시간) *시간 필수 입력	Remarks (비고)
<input checked="" type="checkbox"/> Nasopharyngeal Swab (비인두도말물)	Sample collected <u>01 / 01 / 2021 11:02</u> (검체채취 날짜 및 시간)	
<input type="checkbox"/> Saliva (타액)	Result determined <u>01 / 02 / 2021 10:45</u> (결과 날짜 및 시간)	

Institution Inha University Hospital  
(검사기관명)

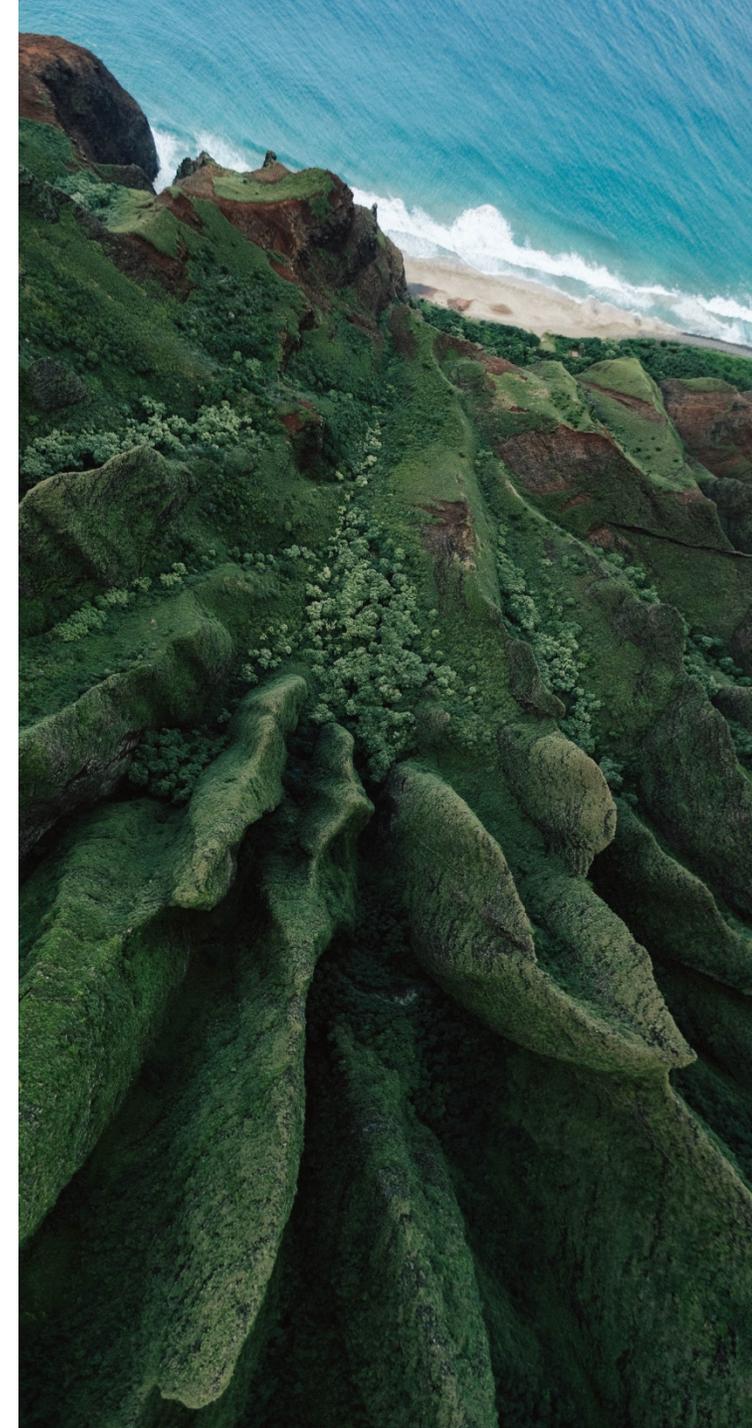
Address 27, Inhang-Ro, Jung-Gu, Incheon, Korea  
(주소)

Physician name Areum KIM M.D.  
(담당의사명)

Signature and date 김아름 01 / 03 / 2021  
(서명 및 날짜) (Month) (Day) (Year)

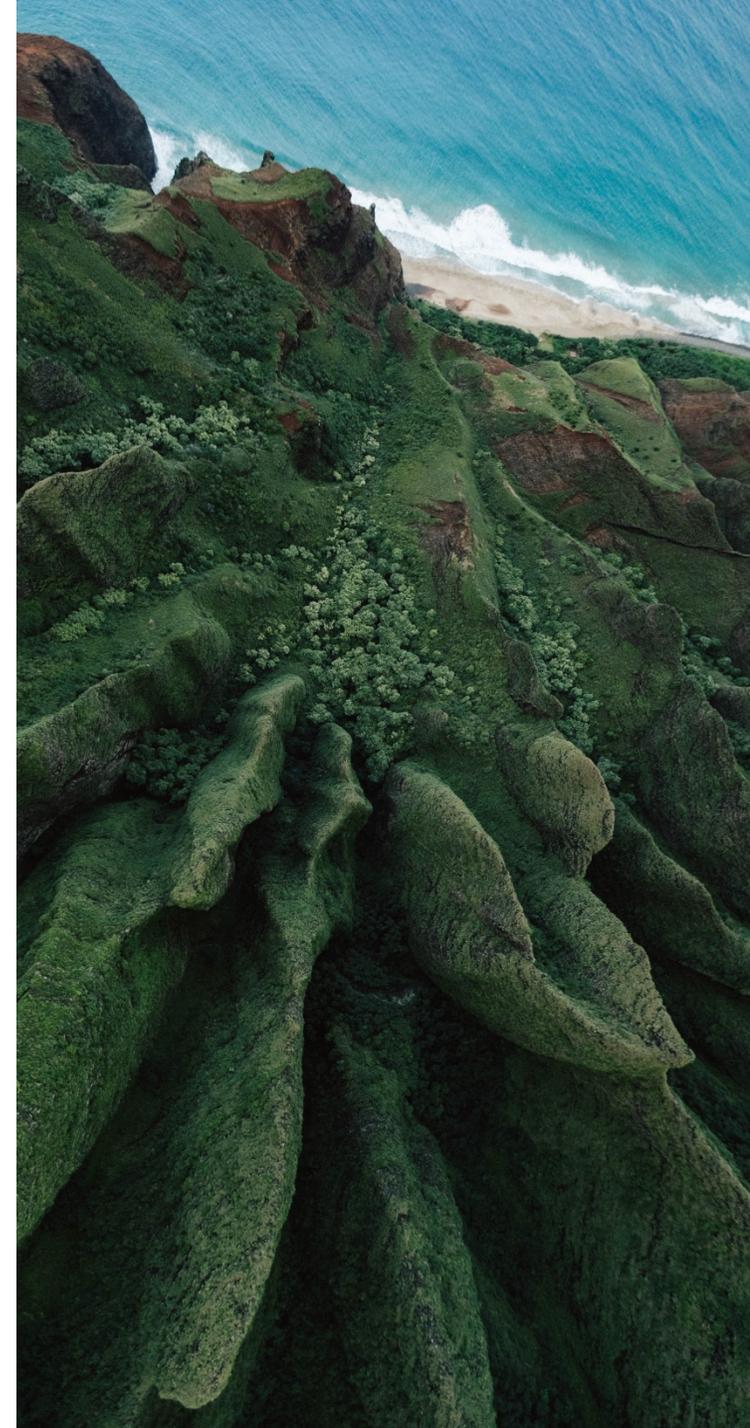
6

State of Hawaii - Certificate of COVID-19  
testing



# Upcoming Korea Promotions

- **Airlines Promotion:** Along with the launching of TTP program, HTK will develop a co-op promotion in highlight of 'Mālama Hawai'i Campaign' with Hawaiian Airlines.
- **Safety & Joy Tours to Hawai'i with Hana Tour:** In partnership with Hana Tour, HTK will develop safe and enjoyable trip to Hawai'i to position the Hawaiian Islands as a safe travel destination, and also to promote the concept of Mālama Hawai'i .
- **Stories of Aloha social media campaign with major publications:** To maximize social media buzz on TTP program and also to inspire mindful travelers, HTK will generate a large scale social media campaign in partnership with major publications owning the high-profile social media channels





# Mahalo!

HAWAII TOURISM  
KOREA

## **Agenda Item #5:**

Presentation by HVCB that will include market insights, updates on air seats to the destinations for the first half of 2021, and updates on calendar year 2021 as it relates to certain assumptions and approaches including but not limited to programs happening in the 1<sup>st</sup> quarter



HAWAII TOURISM AUTHORITY

# Marketing Standing Committee Meeting

January 27, 2021

# Agenda

## 1. Market Insights

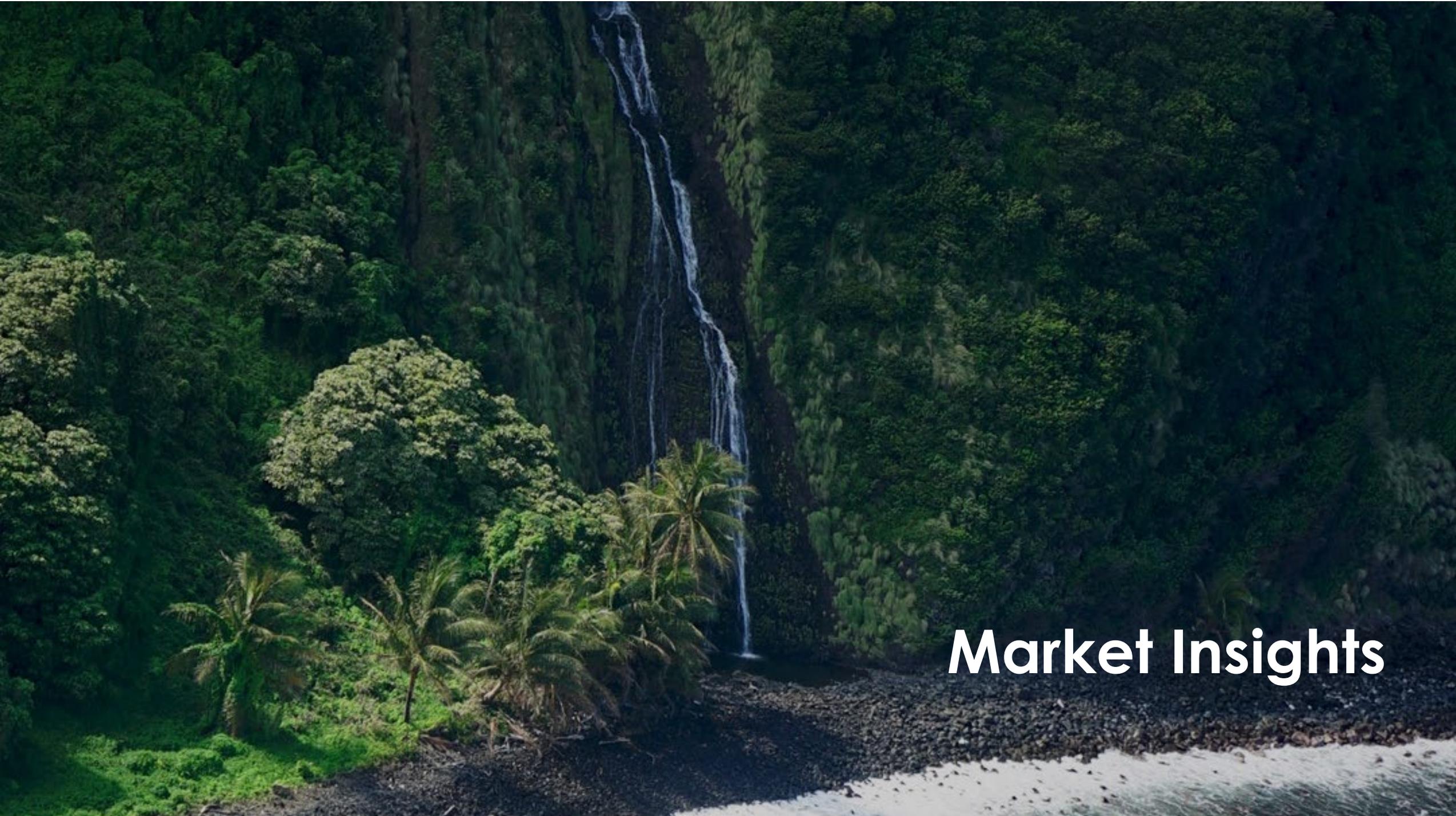
## 2. Mālama Hawai‘i

- Campaign Performance Update
- Program Update

## 3. 2021

- Assumptions/Approach
- Updated Flowchart
- PGA Tour Messaging

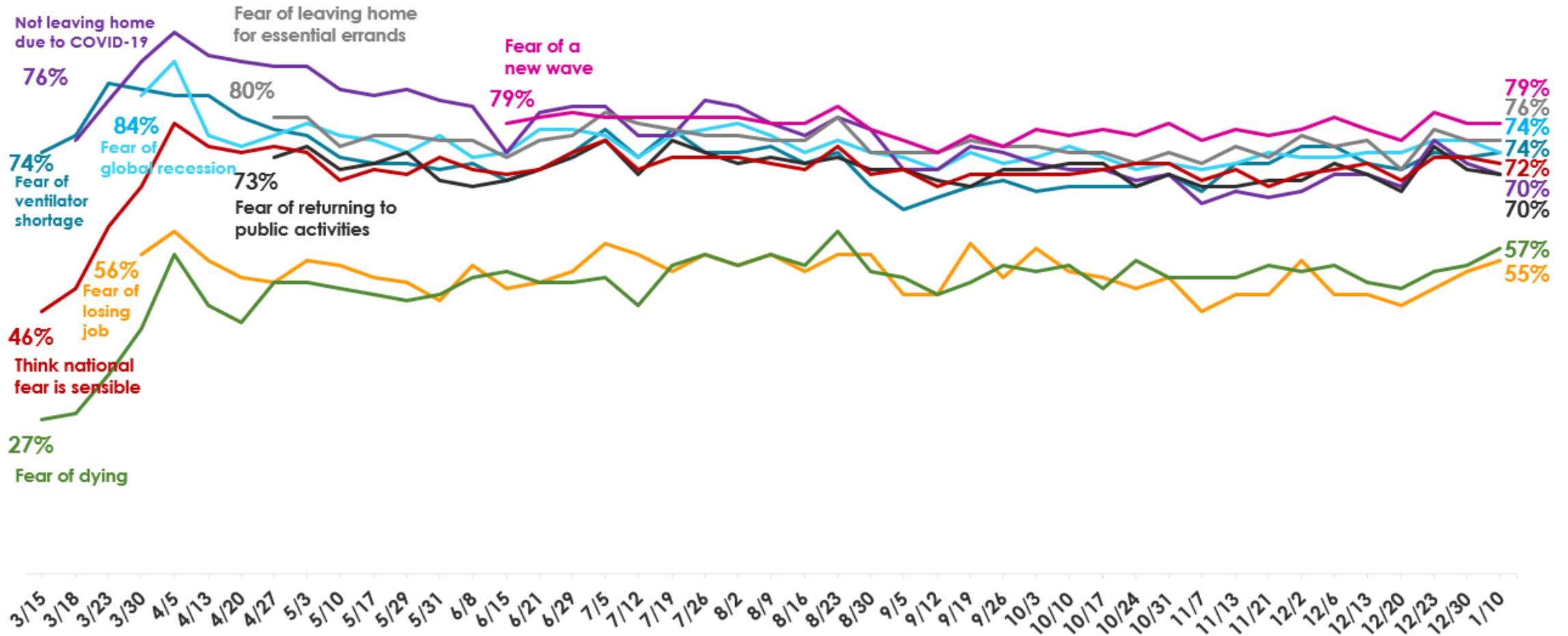




**Market Insights**

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

## The Task: Working in an Environment of Fear



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

- 51.9 percent say they would feel somewhat or very unsafe traveling on a commercial airline right now.
- 71.1 percent of Americans say they have some level of concern about contracting the virus.
- The average distance away from home for American travelers' commercial airline trip is reported to be 1,059 miles.
- 80.0 percent of travelers expressed some level of concern for the national economy.

# Destinations Dreamed about in the Past Week

**Question:** What destination(s) did you day-dream about visiting?

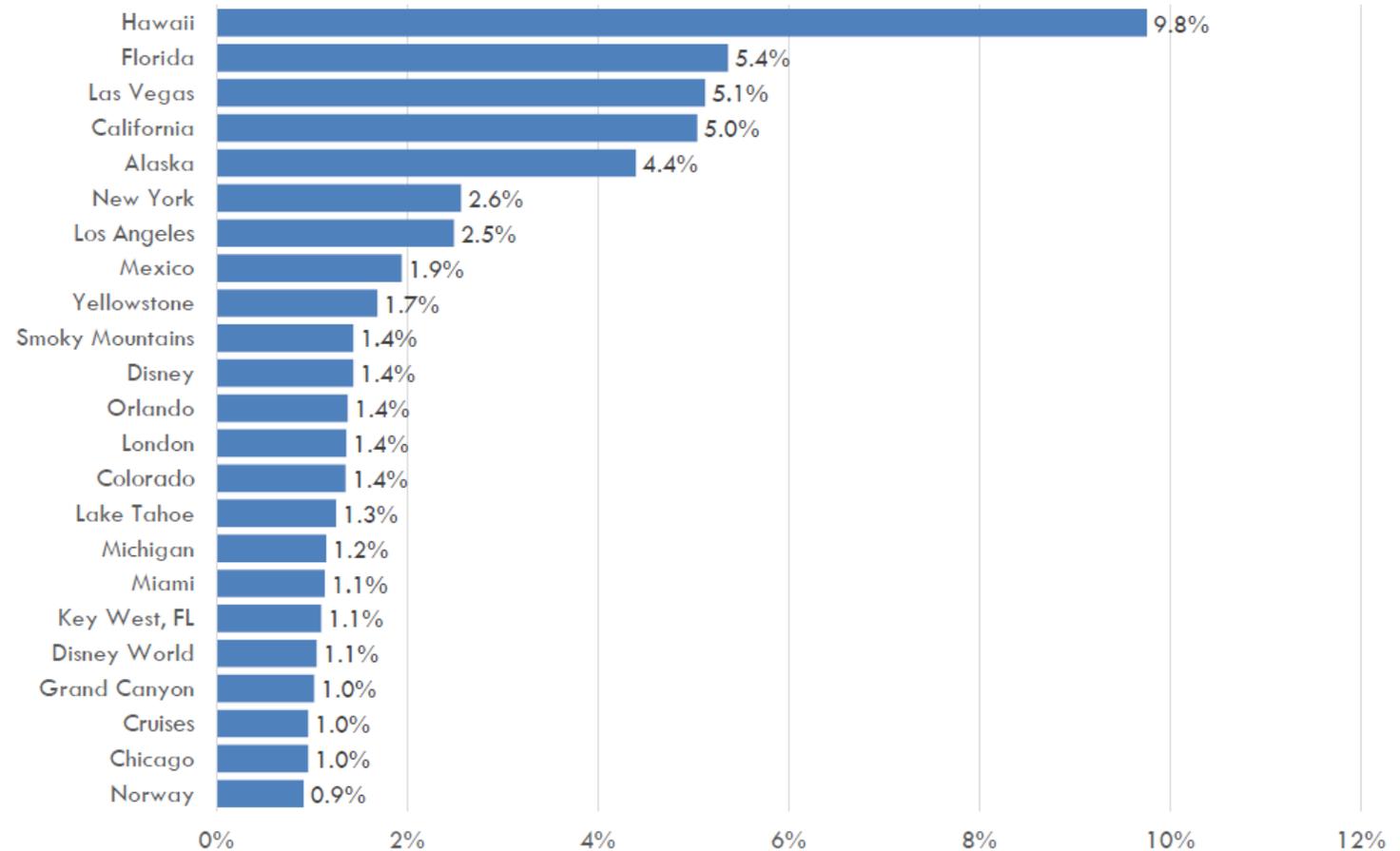
*(Base: Waves 43 data. Respondents who day-dreamed about taking a leisure trip in the past week, 353 completed surveys. Data collected January 1-3, 2021)*



# Destinations Day-dreamed About (unaided)

**Question: What destination(s) did you day-dream about visiting?**

*(Base: Waves 45 data. Respondents daydreaming about travel destinations, 313 completed surveys. Data collected January 15-17, 2021)*

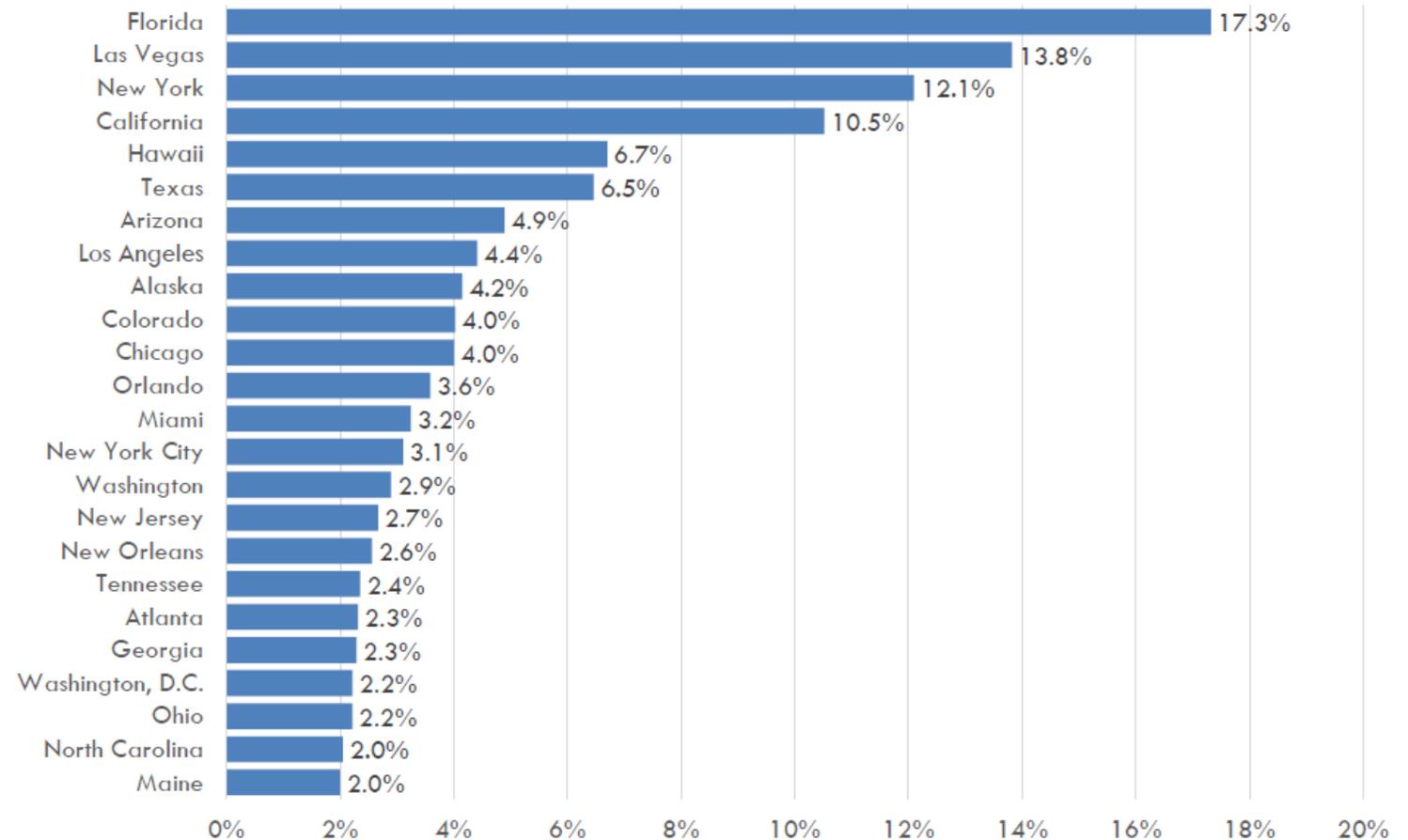


# Most Desired Domestic Destinations for 2021 (unaided)

**Question: Which domestic destinations do you most want to visit this upcoming year? (Write in up to three)**

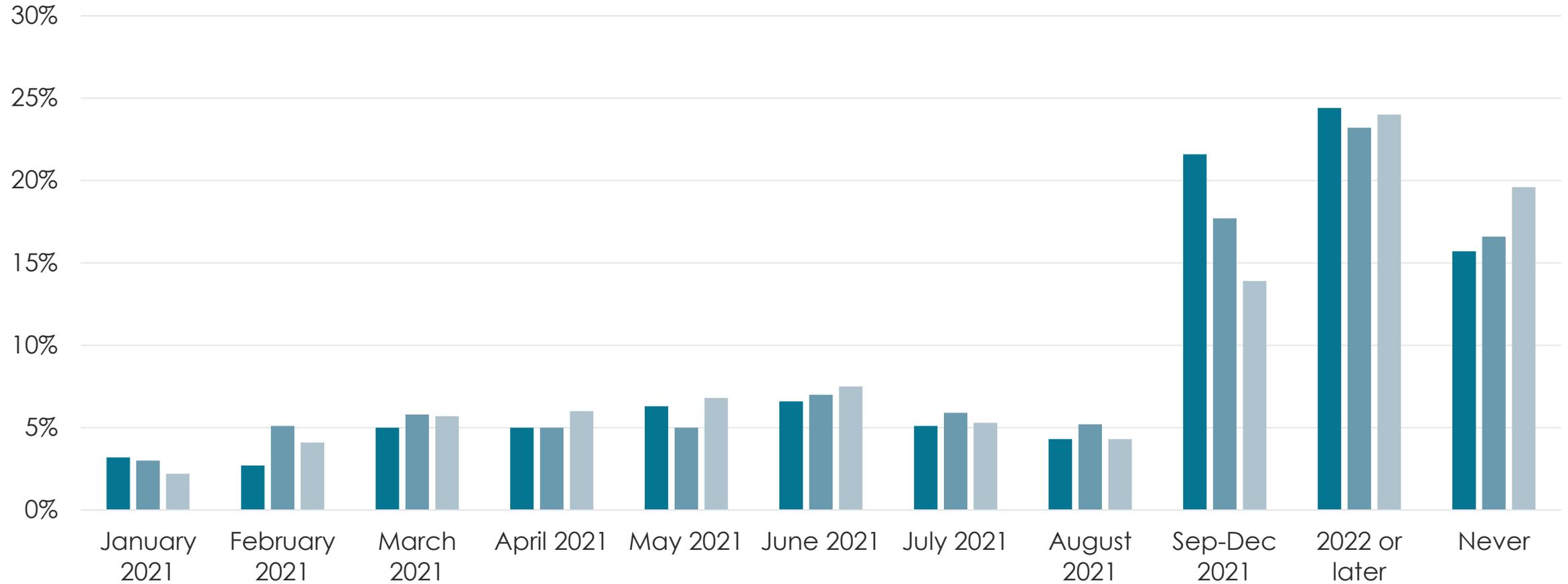
**(Please only include destinations in the United States)**

*(Base: Waves 45 data. All respondents, 1,205 completed surveys. Data collected January 15-17, 2021)*



# Tentative Month of Next Commercial Air Trip of U.S. Leisure Air Travelers

■ Jan 1-3      ■ Jan 8-10      ■ Jan 15-17



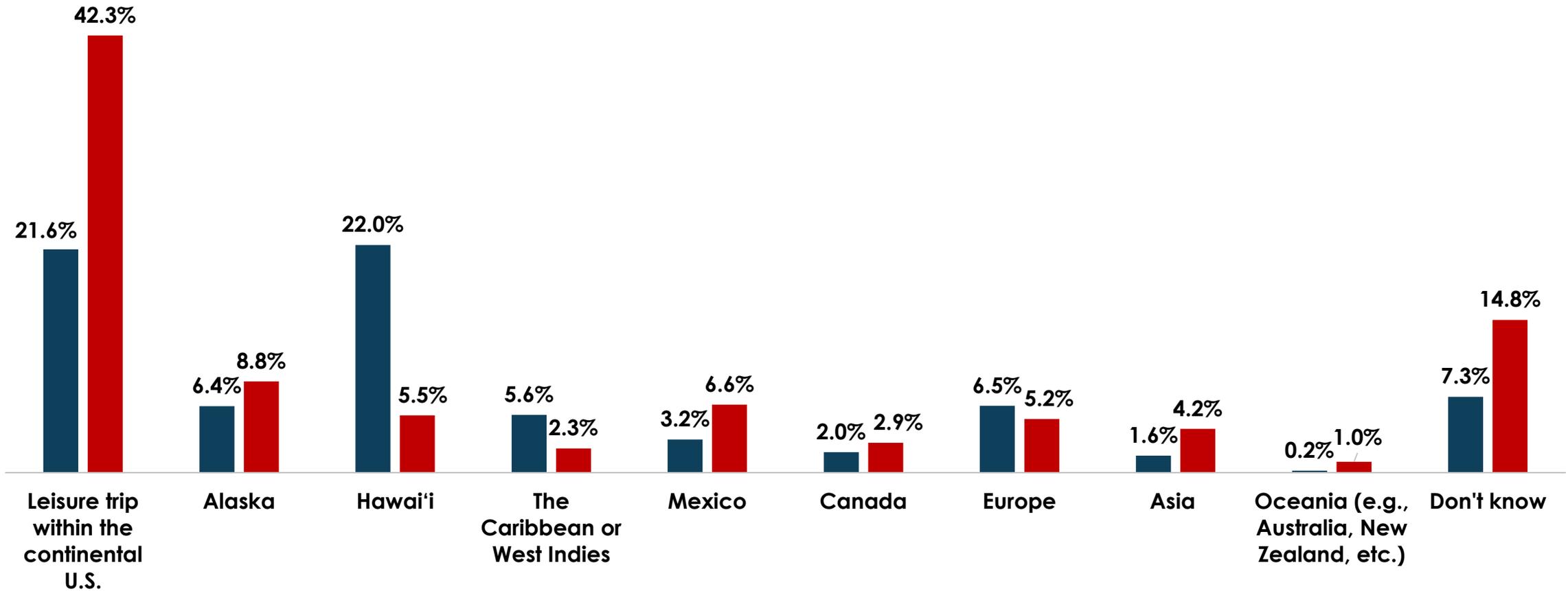
# Scheduled U.S. Seats to Hawai‘i –Jan – March 2021

Preliminary as of 1/20/21 –Subject to adjustment

	# of SEATS January 2020	# of SEATS January 2021	# of SEATS February 2020	# of SEATS February 2021	# of SEATS March 2020	# of SEATS March 2021
<b>O‘ahu</b>	429,135	292,142	400,161	267,547	400,161	424,774
<b>Maui</b>	232,723	184,004	214,906	168,039	214,906	246,721
<b>Kona</b>	101,061	79,736	97,773	76,079	97,773	109,722
<b>Kaua‘i</b>	77,465	8,593	75,637	23,440	75,637	79,250
<b>Hilo</b>	2,656		2,490		2,490	4,648
<b>Total</b>	843,040	564,575	790,967	535,105	790,967	865,115

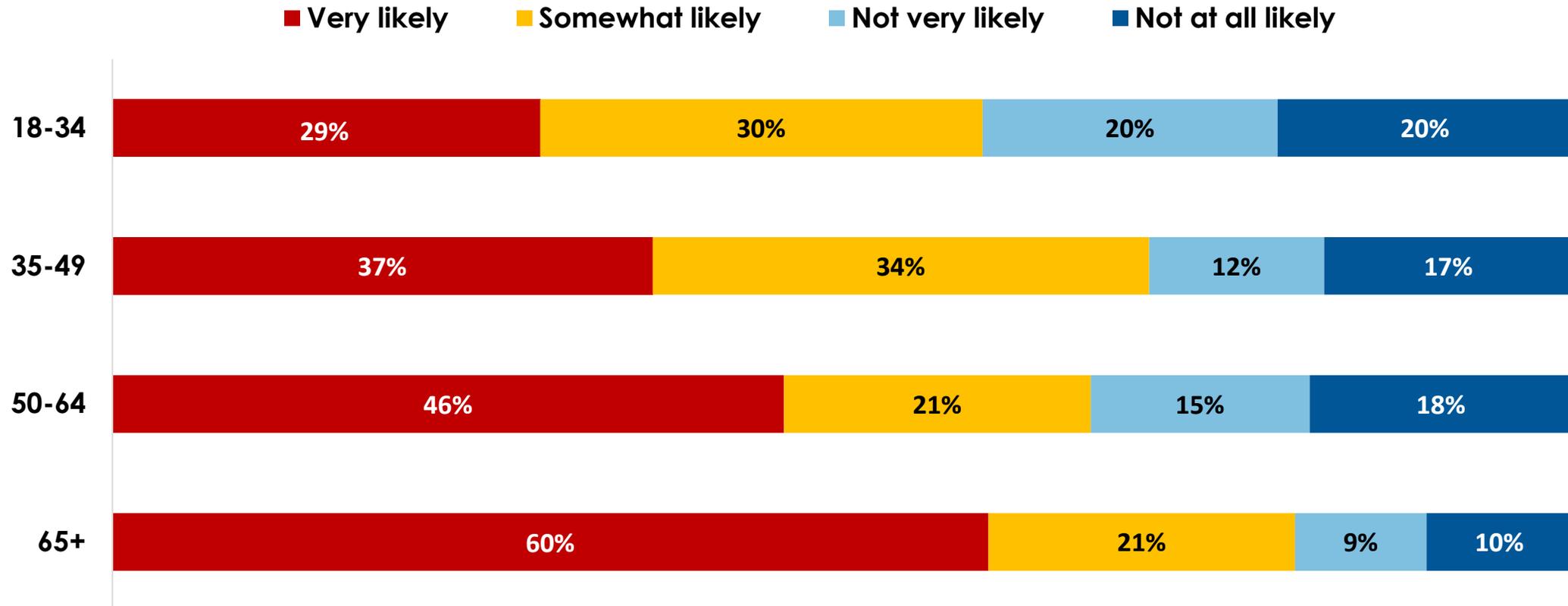
# Leisure trip - next destination

■ Avid Traveler      ■ Long-Distance Air Travelers under 55\*



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

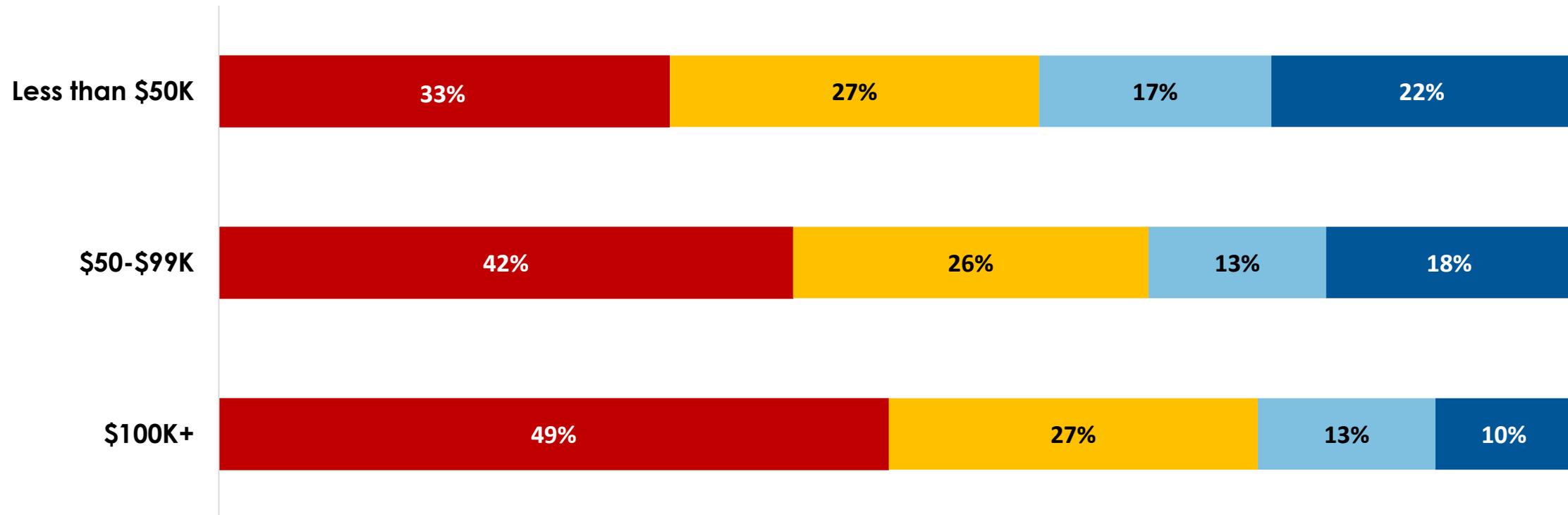
By Age



# 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





# Airline and Trade Outlook

# Air Service Updates and Booking Pace

- January and February booking demand remains low. Signs of life for Spring Break and then more meaningful demand starting in June.
- One airline reported a significant increase in bookings to Hawai'i immediately following the CDC's recommendation for testing and quarantine of all international arrivals into the United States.
- Low mid-week travel demand remains a significant challenge. With fares so low overall, it is challenging to stimulate demand based on fare.
- Forecasting has been extremely challenging with booking windows.
- On a positive note, there are new markets opening for the first time United (Newark to Maui), Hawaiian (Orlando and Austin to Honolulu) and the resumption after many years of American (Charlotte to Honolulu).

# Travel Trade Wholesaler Updates and Booking Pace

- Hawai'i is showing signs of strength with bookings up considerably for 2021 during the week of January 18<sup>th</sup>.
- The trend across all partners is that of closer-in bookings.
- Continue to see cancelations for Q1, 2021, but seeing significantly less for Q2 and later.
- Overall domestic bookings are up, especially since the CDC's recent announcement for all resident and non-resident international arrivals into the U.S. must pre-test and quarantine for 10 days upon arrival.
- One partner commented that demand is relatively strong from Los Angeles, Texas, North Carolina and the NY Metro market.

A lush green forest scene with a waterfall in the center. In the foreground, a hand is visible on the left, holding a large, vibrant green leaf. The background is filled with dense, multi-layered green foliage and trees. The overall atmosphere is natural and serene.

**Mālama Hawai'i  
2020 Performance Update**

# Mālama Hawai'i Performance Update

## **On-island to visitors and residents**

- Kuleana Health & Safety
- 10/16 - 12/31
- Facebook and Instagram

## **Source markets**

- When It's Time & Mālama Hawai'i
- 11/9 - 12/20
- Instagram, Facebook, YouTube, Pinterest
- Advanced TV
- Digital – West Coast Markets



# Results: Kuleana Health & Safety

**PLATFORM:** Facebook and Instagram

**FLIGHT:** 10/15 – 12/31

## RESIDENTS

**REACH:** 617,577

**IMPRESSIONS:** 1,920,900

**VIDEO VIEWS:** 1,801,844

**VIDEO VIEWS AT 100%:** 969,111

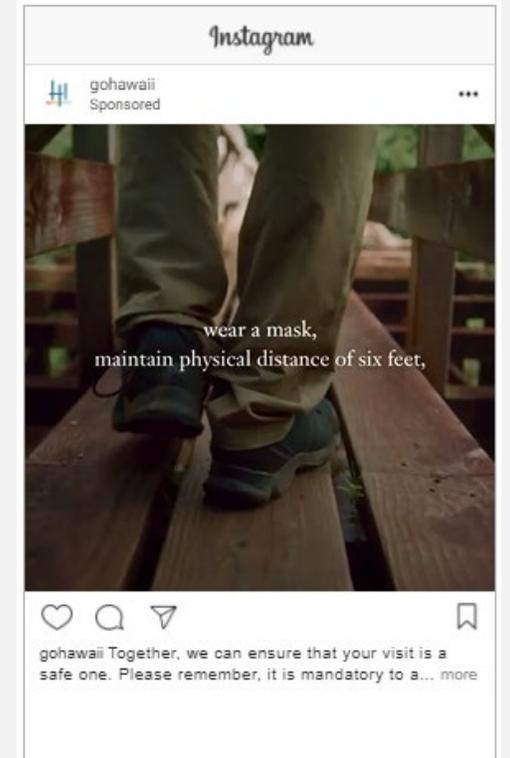
## VISITORS

**REACH:** 184,023

**IMPRESSIONS:** 776,851

**VIDEO VIEWS:** 707,592

**VIDEO VIEWS AT 100%:** 148,862



# Campaign Summary

## Mālama Hawai‘i

**PLATFORM:** Facebook, Instagram, YouTube, and Pinterest

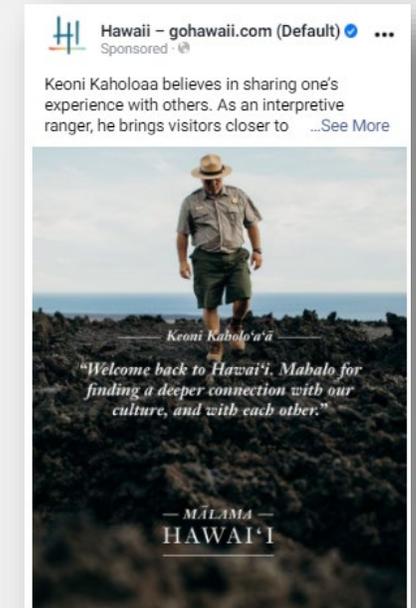
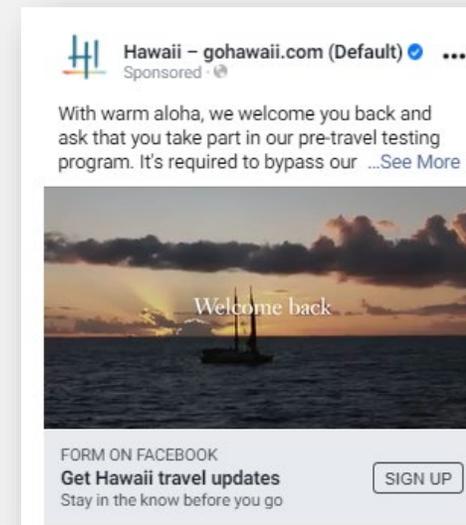
**FLIGHT:** 10/15 – 12/20

**REACH:** 17.9MM

**IMPRESSIONS:** 55.5MM

**VIDEO VIEWS:** 33.6MM

**ENGAGEMENTS:** 249K

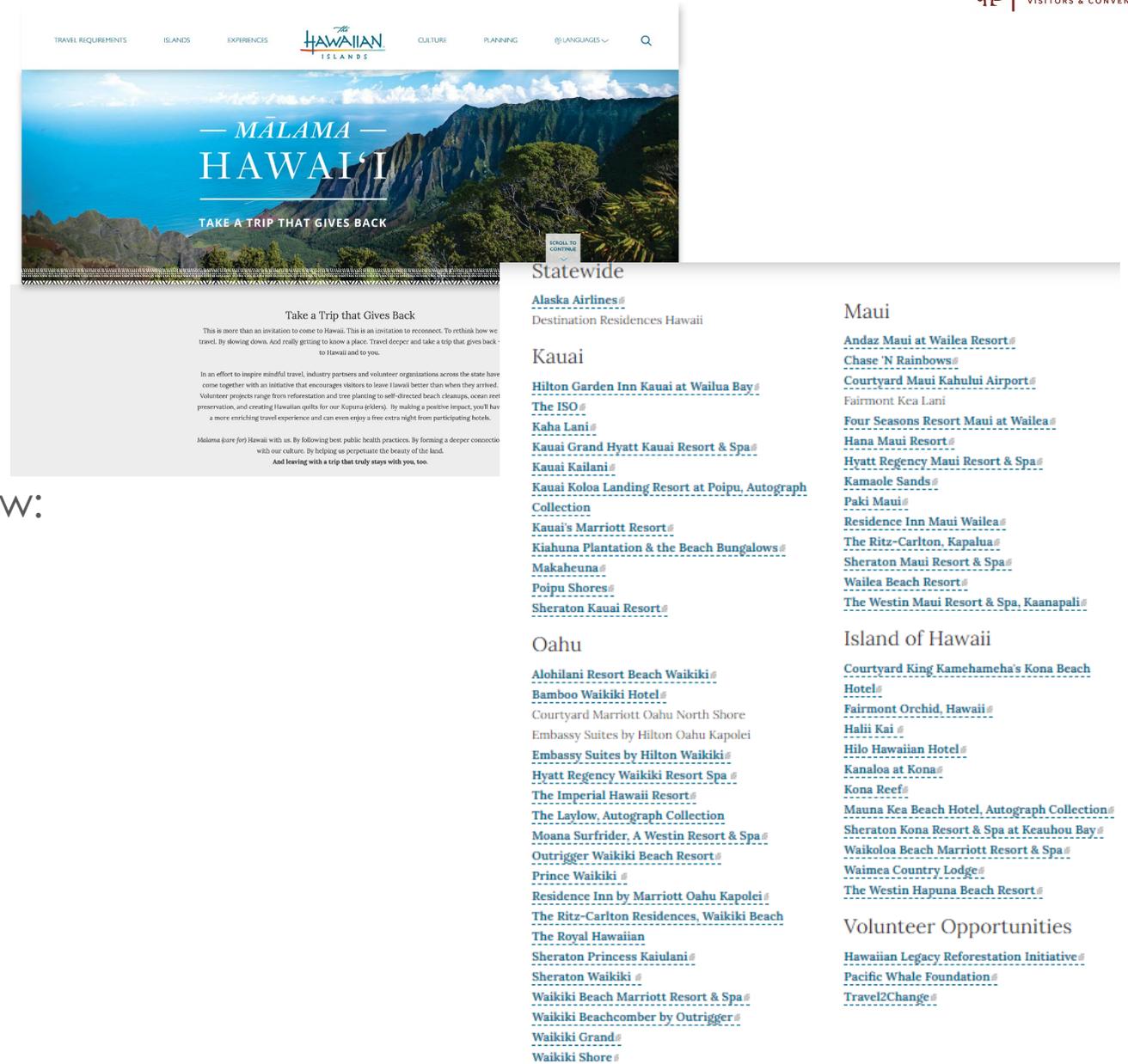




**Mālama Hawai'i Program Update**

# Mālama Hawai‘i Partners

- 80 partners... and counting
  - Listed on [gohawaii.com/malama](http://gohawaii.com/malama)
- Most offers valid throughout 2021
- Volunteer programs continues to grow:
  - Hawaiian Legacy Reforestation Initiative
  - Pacific Whale Foundation
  - Sustainable Coastlines
  - USS Missouri



The screenshot shows the 'Mālama Hawai‘i' website with a navigation bar including 'TRAVEL REQUIREMENTS', 'ISLANDS', 'EXPERIENCES', 'The HAWAIIAN ISLANDS', 'CULTURE', 'PLANNING', and '@LANGUAGES'. The main banner features a scenic view of a Hawaiian island with the text '— MĀLAMA — HAWAII' and 'TAKE A TRIP THAT GIVES BACK'. Below the banner, there is a section titled 'Take a Trip that Gives Back' with a paragraph explaining the initiative and a list of participating hotels and resorts categorized by island: Statewide, Kauai, Oahu, Maui, and Island of Hawaii. Each hotel name is followed by a small icon of a person.

**Take a Trip that Gives Back**

This is more than an invitation to come to Hawaii. This is an invitation to reconnect. To rethink how we travel, by slowing down. And really getting to know a place. Travel deeper and take a trip that gives back to Hawaii and to you.

In an effort to inspire mindful travel, industry partners and volunteer organizations across the state have come together with an initiative that encourages visitors to leave Hawaii better than when they arrived. Volunteer projects range from reforestation and tree planting to self-directed beach cleanups, ocean reef preservation, and creating Hawaiian quilts for our Kupuna (elders). By making a positive impact, you'll have a more enriching travel experience and can even enjoy a free extra night from participating hotels.

*Mālama (care for) Hawaii with us. By following best public health practices. By forming a deeper connection with our culture. By helping us appreciate the beauty of the land. And leaving with a trip that truly stays with you, too.*

**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](#)

## DISCOVER A NEW WESTIN MAUI RESORT & SPA

\$120 MILLION TRANSFORMATION UNVEILED



### Mālama

Start your journey to well-being with us. Mālama in Hawaiian means to take care, not only of yourself but also of the land, we offer a stay package where you can engage in a volunteer service project for beach cleanup and help us preserve the land and marine life for all to enjoy.

Our Mālama Package includes:

- Stay 4 nights, get 5th night free
- Volunteer project with Pacific Whale Foundation

Offer valid for stays through March 31, 2021.

Visit us online  
or call **888-627-8413**  
use promotional code  
**ZZ1**

[LEARN MORE](#)



## BATTLESHIP MISSOURI MEMORIAL Pearl Harbor, Hawaii

### Volunteer

#### Volunteers Welcome at the Battleship Missouri Memorial

When the Battleship Missouri was in commission, there were 2,500 Sailors maintaining the ship. Today, the Battleship Missouri Memorial has less than 25 ship maintenance staff working on the ship, so volunteers are needed to restore and preserve teak decks, metal decks, bulkheads, displays and equipment.

To apply for volunteering, complete the [Volunteer Information, Indoctrination and Safety Brief](#).

Email to: [volunteers@ussmissouri.org](mailto:volunteers@ussmissouri.org)



# Earned Media Coverage



## Lessons From a Tourism Pushback in Hawaii

### THE FUTURE IS REGENERATIVE

As the discussion evolves between tourism authorities and concerned residents – the latest fury relates to the Maui school closures due to rising cases and locals protesting prioritizing tourism over the public health – De Fries noted that there’s one thing everyone agrees to, whether pro tourism or not: the need for each community to take responsibility for the restoration and preservation of the archipelago’s nature and culture for generations to come.

It’s what the Hawaii’s new tourism campaign is banking on: the native ancestral concept of “Malama” which means “to nurture” and aligns with the principle of regenerative tourism.

“So my emphasis has now moved towards regenerative tourism by saying, even those of you that don’t like tourism or resist it, let’s all agree on one thing: in three of four generations from now, we want the natural resource base to be even healthier than what it is today – our fresh water, our forests, our coastal zones,” De Fries said. “I haven’t run into one person yet that said I don’t agree.”

Sixty-eight hotels and tourism businesses are part of the [Malama Hawaii campaign](#) so far, as well as a host of volunteer organizations and Alaska Airlines. Essentially, it’s an offer for visitors and residents to “take a trip that gives back to Hawaii” and “travel deeper and slower” by signing up for an ecotourism and volunteer learning activity while in turn benefiting from travel perks for doing so.

## TRAVEL+ LEISURE

## I Traveled to Maui During the COVID-19 Pandemic – Here’s What It Was Really Like

### Giving Back to the Island

Hawaii recently rolled out a new program called [Malama Hawaii](#), a new initiative that “encourages visitors to leave Hawaii better than when they arrived.” You’ll find a variety of projects like tree planting, self-directed beach cleanups, ocean reef preservation, and more. If you choose to stay in a participating resort, you can receive a free night for volunteering during your trip.

At Wailea Beach Resort, I had the rewarding experience of creating Hawaiian quilts for elders in hospice care on the island. I enjoyed the friendly conversation I had with a local, who showed me how to stitch as she shared stories about Hawaiian culture and how tourism in Maui has shifted amid the pandemic. And although this turbulent time has been about protecting yourself and others, the warmth of the Hawaiian people taught me that isolation doesn’t have to mean alienation.



**2021 Plan**

## 2021 Residents

- Continue to stay in touch with resident's position on tourism
- Working with HTA Team for insight from the 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 Partnerships

- Coordination, Cooperation,  
Budget Extensions  
(HVCB/airlines/hotels)



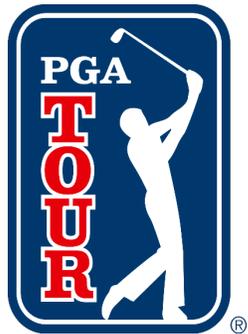
# 2021 Creative Messaging

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





# PGA Tour Player Vignettes



# Video

# Video

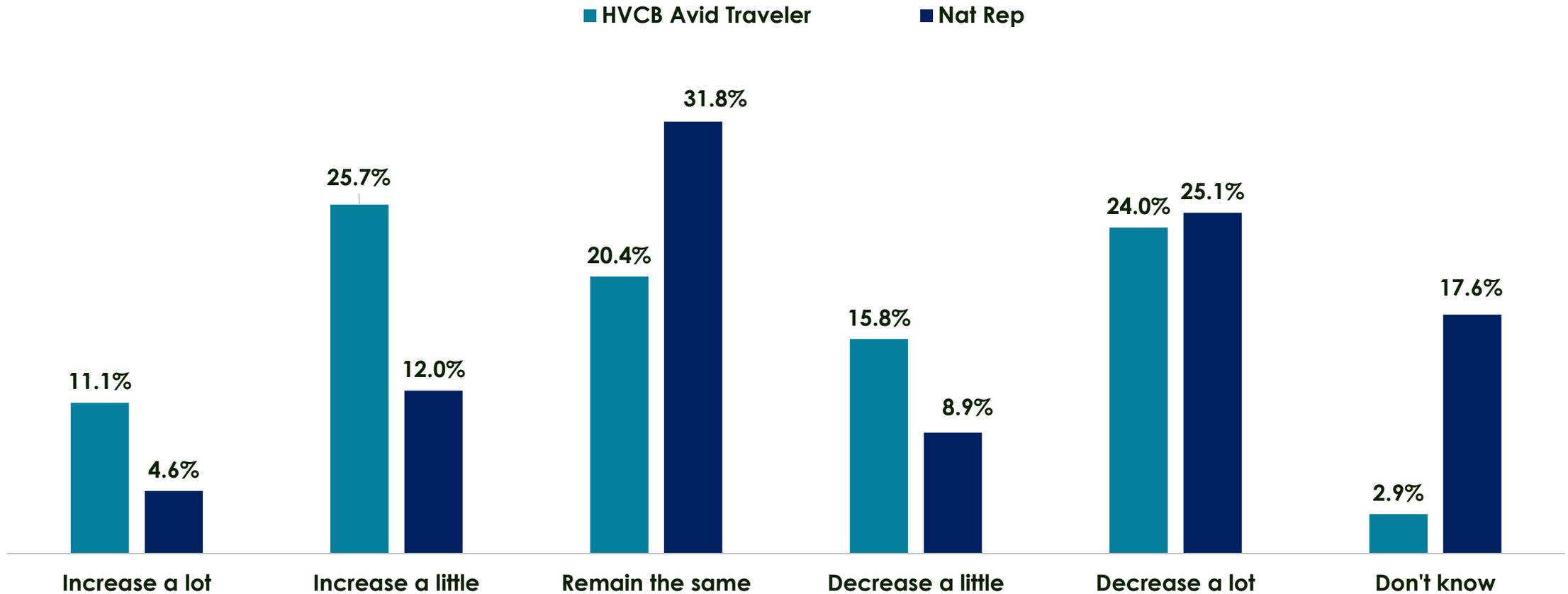
# Video

# Video



**Mahalo**

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



THE RESULTS: WHEN IT'S TIME VIDEO

**PLATFORM:** Facebook, Instagram, YouTube, and Pinterest

**FLIGHT:** 10/15 – 12/31

**IMPRESSIONS:** 3,751,145

**FACEBOOK/INSTAGRAM REACH:** 558,820

**YOUTUBE REACH:** 608,903

**PINTEREST REACH:** 588,021

**VIDEO VIEWS:** 2,204,841



THE RESULTS: ENTRY REQUIREMENTS ADS

**PLATFORM:** Facebook and Instagram

**FLIGHT:** 11/9 – 11/22

**REACH:** 839,886

**IMPRESSIONS:** 2,488,479

**VIDEO VIEWS:** 2,195,922

 **Hawaii – gohawaii.com (Default)**    
Sponsored · 

With warm aloha, we welcome you back and ask that you take part in our pre-travel testing program. It's required to bypass our [...See More](#)



FORM ON FACEBOOK  
**Get Hawaii travel updates**  
Stay in the know before you go [SIGN UP](#)

 **Hawaii – gohawaii.com (Default)**    
Sponsored · 

It's time. Welcome back to Hawaii. Before you go, a pre-travel testing program is required to bypass our mandatory 14-day [...See More](#)



FORM ON FACEBOOK  
**Get Hawaii travel updates**  
Stay in the know before you go [SIGN UP](#)

THE RESULTS: MĀLAMA HAWAI‘I OFFER AD

**PLATFORM:** Facebook and Instagram

**FLIGHT:** 11/16 – 11/22

**REACH:** 678,396

**IMPRESSIONS:** 1,222,180

**VIDEO VIEWS:** 817,866

**VIDEO VIEWS AT 100%:** 233,521

Hawaii – gohawaii.com (Default) Sponsored

Enjoy a free extra night from participating hotels when you malama (care for) Hawaii. Mahalo for traveling mindfully (and ...See More

— MĀLAMA —  
HAWAI‘I

Enjoy a free extra night at participating hotels when you *malama* (care for) Hawaii.

GOHAWAII.COM  
**Enjoy a free night**  
Find your preferred hotel

LEARN MORE

Instagram

gohawaii Sponsored

— MĀLAMA —  
HAWAI‘I

Enjoy a free extra night at participating hotels when you *malama* (care for) Hawaii.

Learn More

gohawaii Enjoy a free extra night from participating hotels when you malama (care for) Hawaii. Mah... more

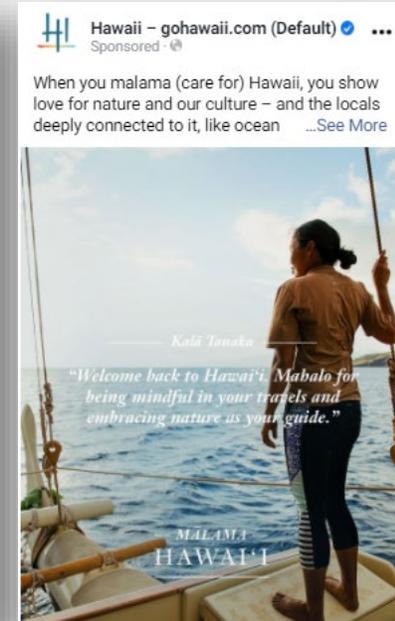
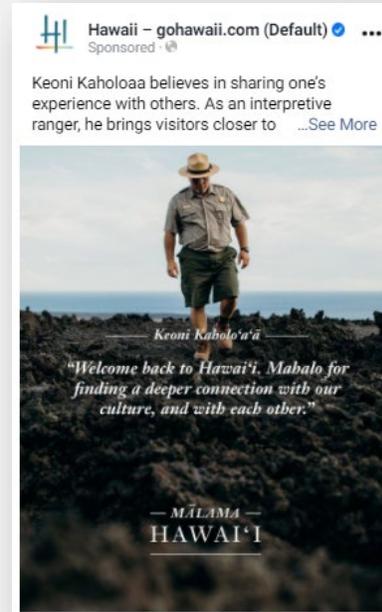
THE RESULTS: AMBASSADOR INVITATIONS

**PLATFORM:** Facebook and Instagram

**FLIGHT:** 11/16 – 11/22

**REACH:** 1,523,445

**IMPRESSIONS:** 6,019,954



THE RESULTS: PROSPECTING VIDEO ADS

**PLATFORM:** Facebook, Instagram, YouTube, and Pinterest

**FLIGHT:** 12/1 – 12/6

**FACEBOOK/INSTAGRAM REACH:** 1,058,816

**YOUTUBE REACH:** 2,040,850

**PINTEREST REACH:** 1,298,965

**IMPRESSIONS:** 14,727,959

**VIDEO VIEWS:** 8,386,045

 Hawaii – gohawaii.com (Default)    
Sponsored · 

Come for the adventure. Leave with a deeper connection. Before traveling, testing is required to bypass Hawaii's mandatory 14- ...See More



HAWAIICOVID19.COM  
**Get Hawaii travel updates**  
Stay in the know before you go

[LEARN MORE](#)

 Hawaii – gohawaii.com (Default)    
Sponsored · 

There's so much more to experience when you malama (care for) Hawaii. Before traveling, testing is required to bypass ...See More



HAWAIICOVID19.COM  
**Get Hawaii travel updates**  
Stay in the know before you go

[LEARN MORE](#)

THE RESULTS: RETARGETING VIDEO ADS

**PLATFORM:** Facebook, Instagram, YouTube, and Pinterest

**FLIGHT:** 12/7 – 12/20

**FACEBOOK/INSTAGRAM REACH:** 1,272,546

**YOUTUBE REACH:** 3,213,255

**PINTEREST REACH:** 748,416

**IMPRESSIONS:** 16,958,870

**VIDEO VIEWS:** 14,361,216

Hawaii – gohawaii.com (Default) Sponsored

When you malama (care for) Hawaii, you find more to learn and love. Like Kauai coffee from the source. Kauai is temporarily ...See More



Come for the flavor.  
Leave with a deeper connection.



HAWAIICOVID19.COM  
Get Hawaii travel updates Stay in the know before you go [LEARN MORE](#)

Hawaii – gohawaii.com (Default) Sponsored

Come for the nature. Leave with a deeper connection, to Hawaii and each other. Before traveling, testing is required to ...See More



Reconnect with nature.  
And each other.



HAWAIICOVID19.COM  
Get Hawaii travel updates Stay in the know before you go [LEARN MORE](#)

Hawaii – gohawaii.com (Default) Sponsored

Better than a meditation app. Find a deeper connection when you travel mindfully and malama (care for) Hawaii. Please ...See More



Take the scenic route.  
And the mindful one.



HAWAIICOVID19.COM  
Get Hawaii travel updates Stay in the know before you go [LEARN MORE](#)

Hawaii – gohawaii.com (Default) Sponsored

Our ohana welcomes yours. When you travel mindfully and malama (care for) Hawaii, you'll leave with a deeper connection. ...See More



Come for the adventure.  
Leave with a deeper connection.



HAWAIICOVID19.COM  
Get Hawaii travel updates Stay in the know before you go [LEARN MORE](#)

THE RESULTS: RETARGETING IMAGE ADS

**PLATFORM:** Facebook, Instagram, and Pinterest

**FLIGHT:** 12/7 – 12/20

**FACEBOOK/INSTAGRAM REACH:** 892,281

**PINTEREST REACH:** 621,753

**IMPRESSIONS:** 3,411,070

 Hawaii – gohawaii.com (Default)    
Sponsored · 

Every place in Hawaii has a story. Leave with a deeper connection to our land and our culture when you travel mindfully and [...See More](#)

Come for the views. Leave with a deeper connection.





HAWAIIICOID19.COM  
**Get Hawaii travel updates**  
Stay in the know before you go

[LEARN MORE](#)

 Hawaii – gohawaii.com (Default)    
Sponsored · 

Stay open. Stay mindful. Leave with a deeper connection when you malama (care for) Hawaii. Please remember, it is [...See More](#)

Less remote working. More remote exploring.





HAWAIIICOID19.COM  
**Get Hawaii travel updates**  
Stay in the know before you go

[LEARN MORE](#)

THE RESULTS: MINDFUL TRAVEL GUIDE

**FLIGHT:** 12/10 – 12/20

**INSTAGRAM**

**REACH:** 1,452,263

**IMPRESSIONS:** 3,699,822

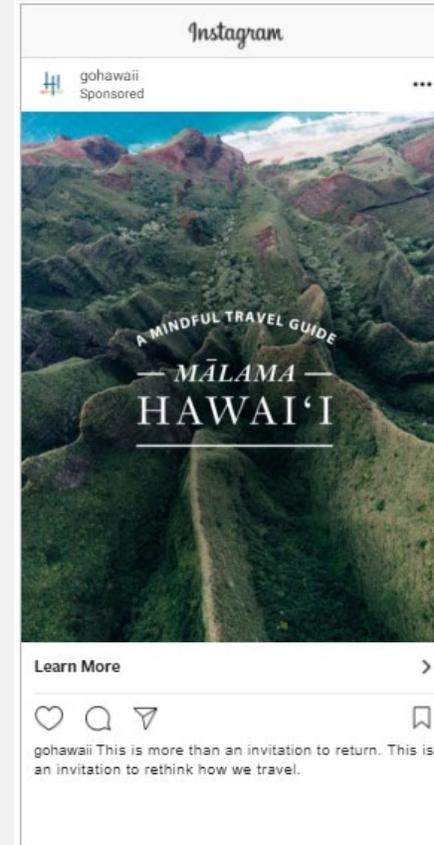
**VIDEO VIEWS:** 3,480,647

**FACEBOOK**

**REACH:** 540,022

**IMPRESSIONS:** 3,274,476

**VIDEO VIEWS:** 2,196,967



## **Agenda Item #6:**

Presentation by HTJ including market insights, updates on airlines booking pace, updates on the leisure and group segments and program to be engaged in Q1 and calendar year 2021

# ~Japan Market Update~

January 27, 2021

Eric Takahata | Managing Director

# Japan Market Current Situation

# Japan's COVID-19 Cases (as of 1/22)

## Population

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

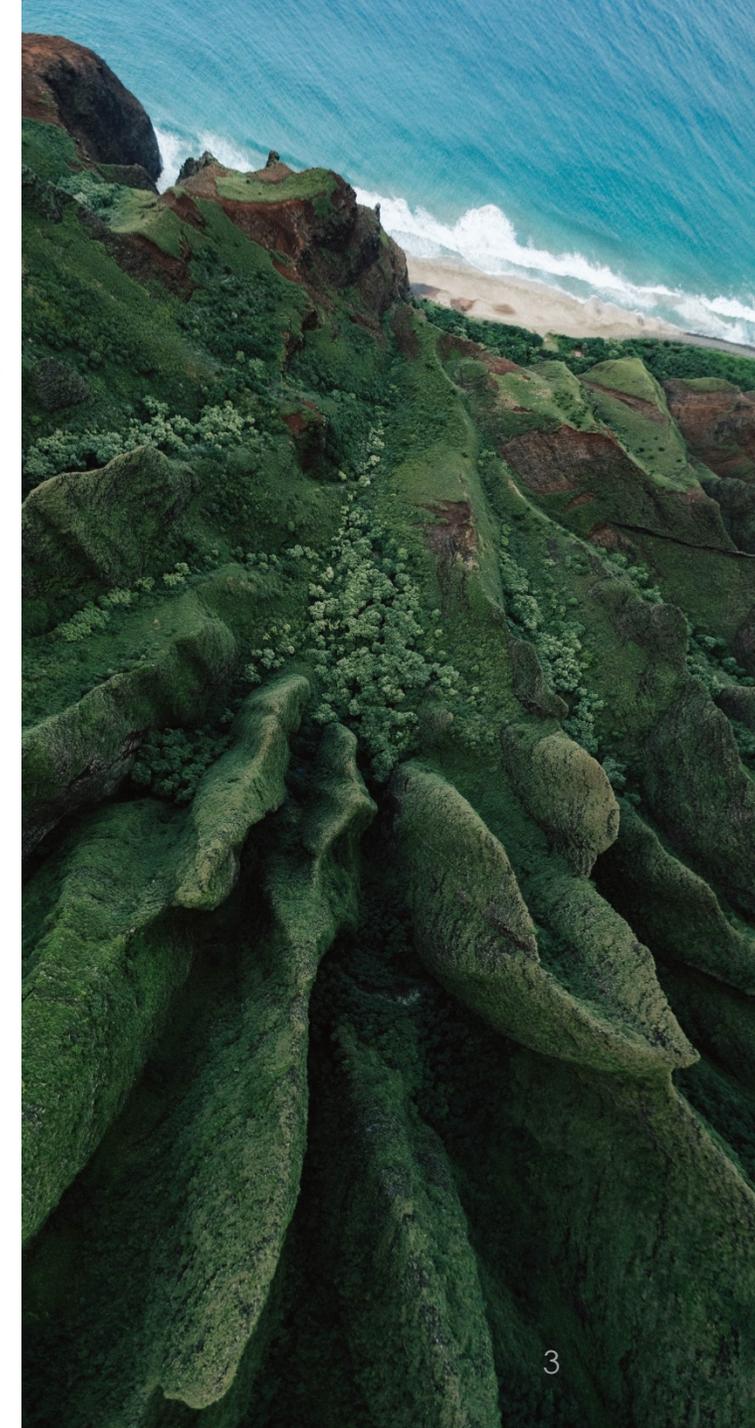
## Cases of COVID-19 in the US, Hawai'i and Japan

	U.S.	Hawai'i	Japan
Total Cases	24,512,618	<b>24,870</b>	<b>348,646</b>
Recovered	NA	<b>NA</b>	<b>277,225</b>
Deaths	408,697	<b>332</b>	<b>4,829</b>

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

	Hawai'i	Japan
Confirmed Cases	<b>1,760</b>	<b>277</b>

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



# National news

## 11 Prefectures

1/8~

Tokyo, Kanagawa,  
Chiba, Saitama

1/13~

Tochigi, Aichi, Gifu,  
Osaka, Kyoto,  
Hyogo & Fukuoka



- **2<sup>nd</sup> Japan State of Emergency Declaration (until 2/7 )**
- **Japan entry restrictions**
  - Requirement PCR test
  - Suspension Business/Residence track
- **Vaccination starting Late Feb.**

# Economy

## Fiscal 2020 budget – 3<sup>rd</sup> Supplemental budget

- The Cabinet approved a **¥21.84 trillion** and additional budget boosts Japan's government total spending to exceed **¥175 trillion**

## Economic Indicators

- Japan's economy in the July-September period **grew an annualized real 22.9%** from the previous quarter, upgrading the preliminary figure of 21.4% on firmer private consumption
- Private consumption **soared 5.1%**, revised upward from the 4.7% drop in the preliminary report released 11/16



# Travel industry updates



- **Go to Travel Campaign:** Suspended until 2/7; however, the government identified “Travel” as one of the economic recovery indicators. This campaign extends until the end of June, 2021.
- **Managed Travel:** Travel Industry with JATA developing “Managed Travel” concept to introduce in the Market as new normal travel style for Japanese. (Discussing with Ministry of Travel)
- **Forecast:** The Industry recovery forecast indicates positive trends for Summer to Fall 2021.

Q1 & Q2 = Ramp up/Promotion

# Airline updates



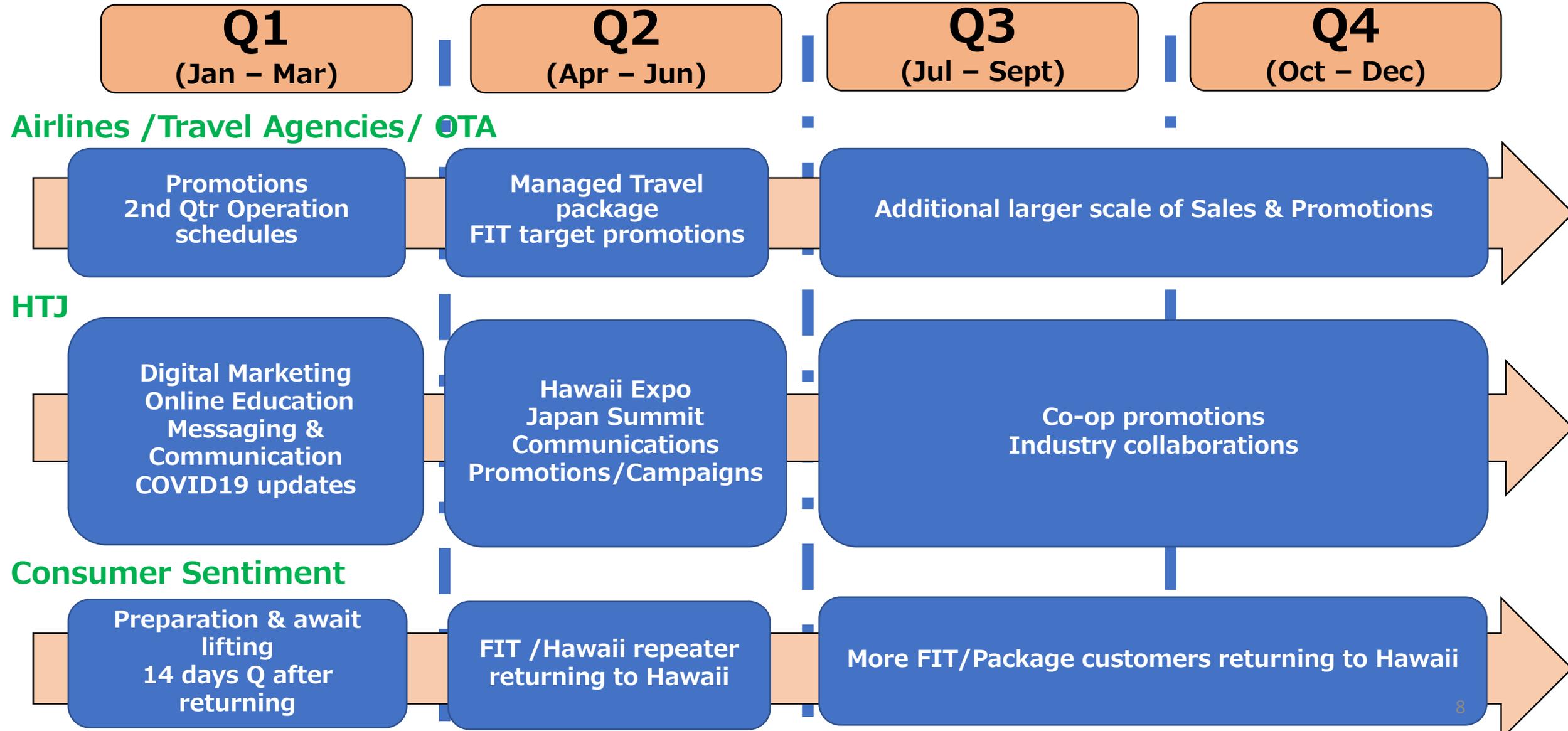
JAPAN AIRLINES



2021 January				
Op Airline Code	Flight #	Origin Code	Total Flights	Seats
ANA	NH 186	HND	2	492
ANA	NH 186	HND	7	1,505
HA	HA 822	NRT	15	4,170
HA	HA 450	KIX	10	2,780
HA	HA 864	HND	11	3,058
JAL	JL 8782	HND	7	1,302
ZG	ZG2	NRT	7	2,030
Total			<b>59</b>	<b>15,337</b>

2021 February				
Op Airline Code	Flight #	Origin Code	Total Flights	Seats
ANA	NH 186	HND	8	1,968
HA	HA 822	NRT	15	4,170
HA	HA 450	KIX	12	3,336
HA	HA 864	HND	12	3,336
JAL	JL 8782	HND	4	744
ZG	ZG2	NRT	TBA	TBA
Total			<b>51</b>	<b>13,554</b>

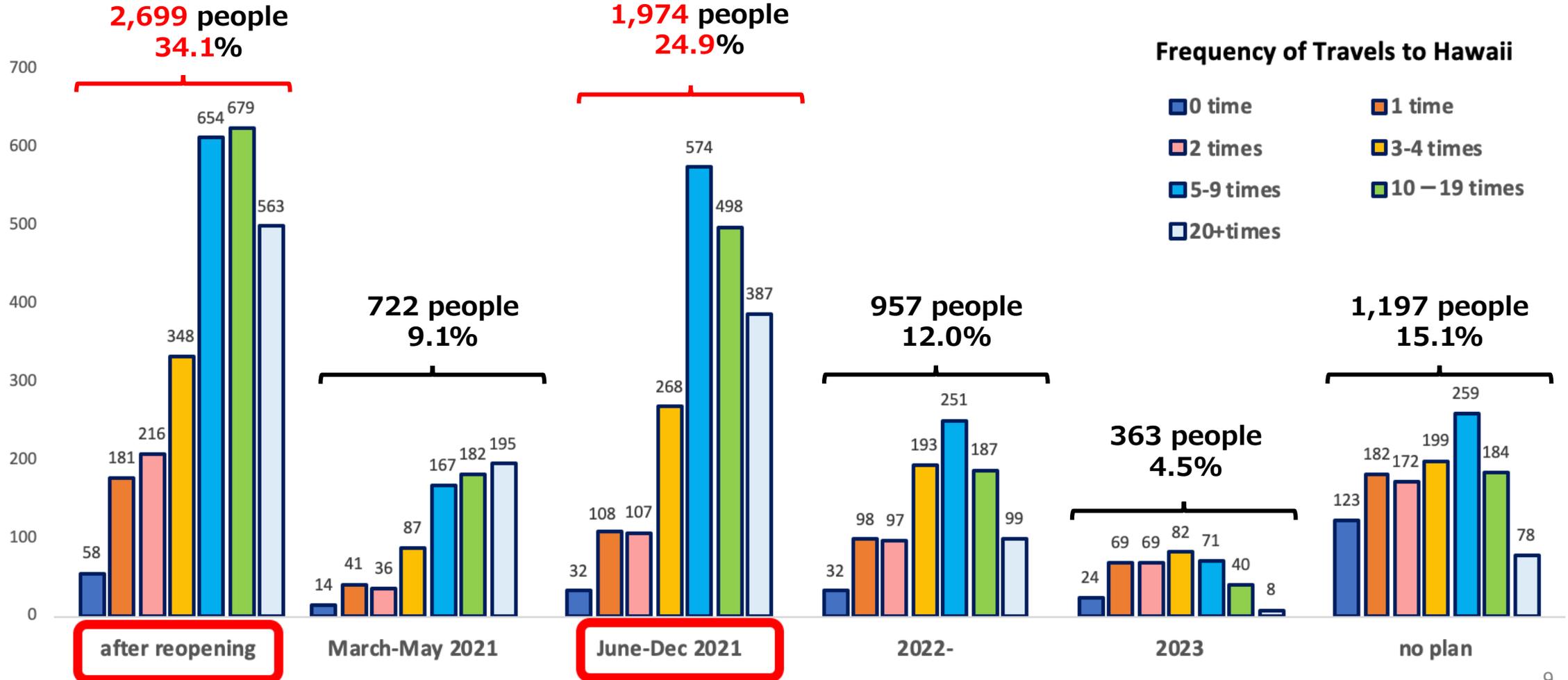
# 2021 Industry Activities



# Consumer Sentiment (N= 7,912)

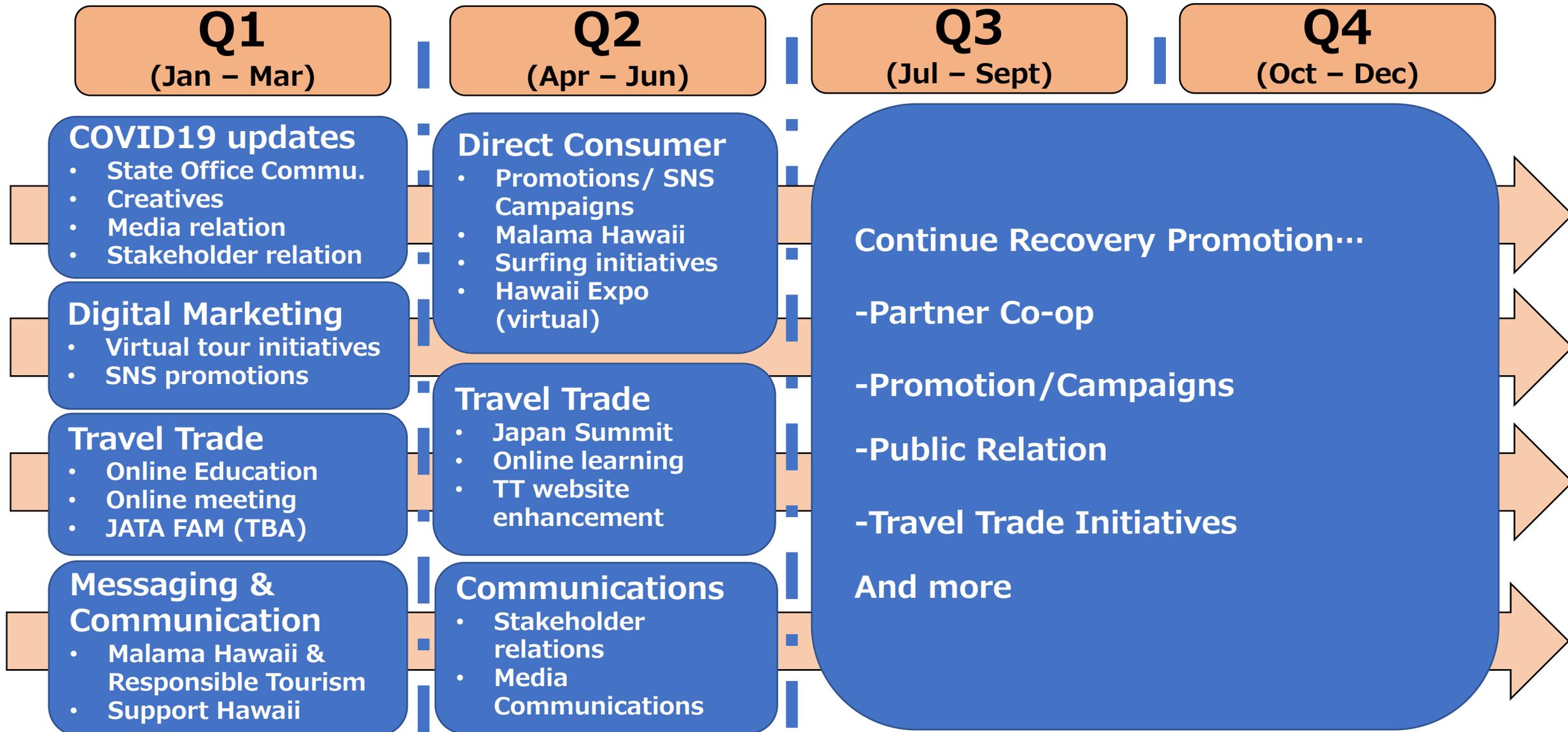
## Timing: When consumers would like to visit Hawai'i

Q. WHEN DO YOU PLAN TO VISIT HAWAII NEXT TIME?



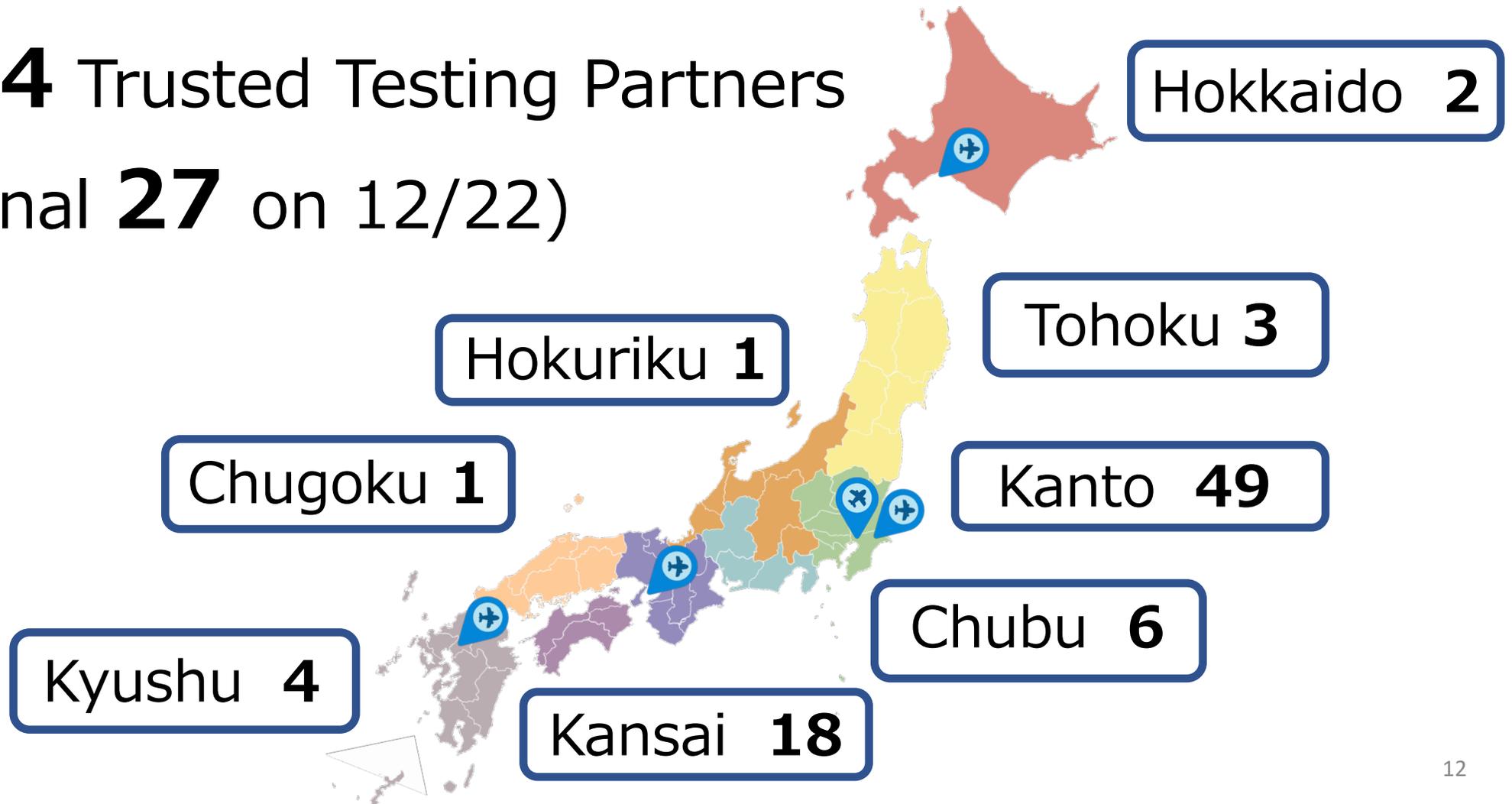
# HTJ Activity

# 2021 HTJ Activity



# Hawaii's Trusted Testing Partners

Total **84** Trusted Testing Partners  
(additional **27** on 12/22)



# Mālama Hawai'i Initiatives ~ Local NPO Virtual Events ~

 リモートハワイ旅「Support Hawai'i」あなたの学びがハワイNPOへの支援につながる ~ポリネシア航海協会~  
2020.12.25



1/8 Hokulea Walking tour  
with Japanese (Live)

 リモートハワイ旅「Support Hawai'i」あなたの学びがハワイNPOへの支援につながる ~ビショップ ミュージアム~  
2020.12.25



1/22 Bishop Founders' story  
(Live)

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