



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

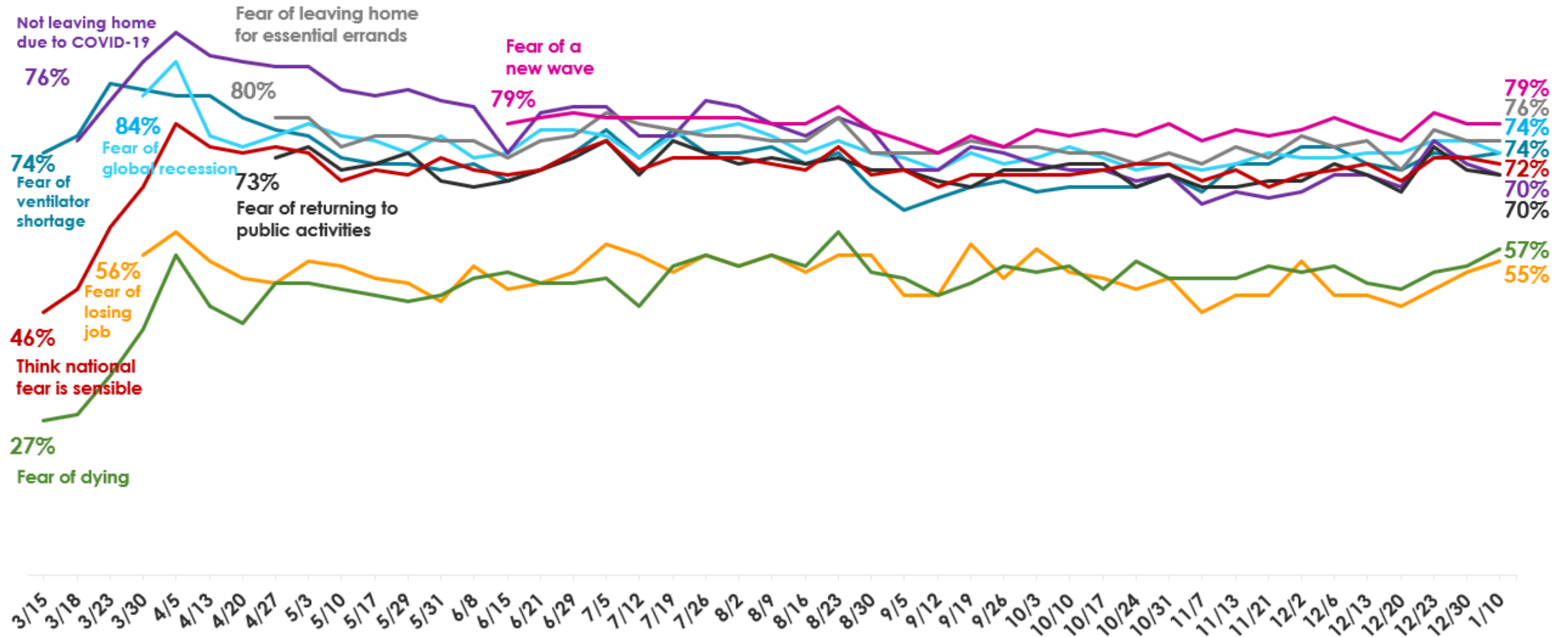




Market Insights

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?

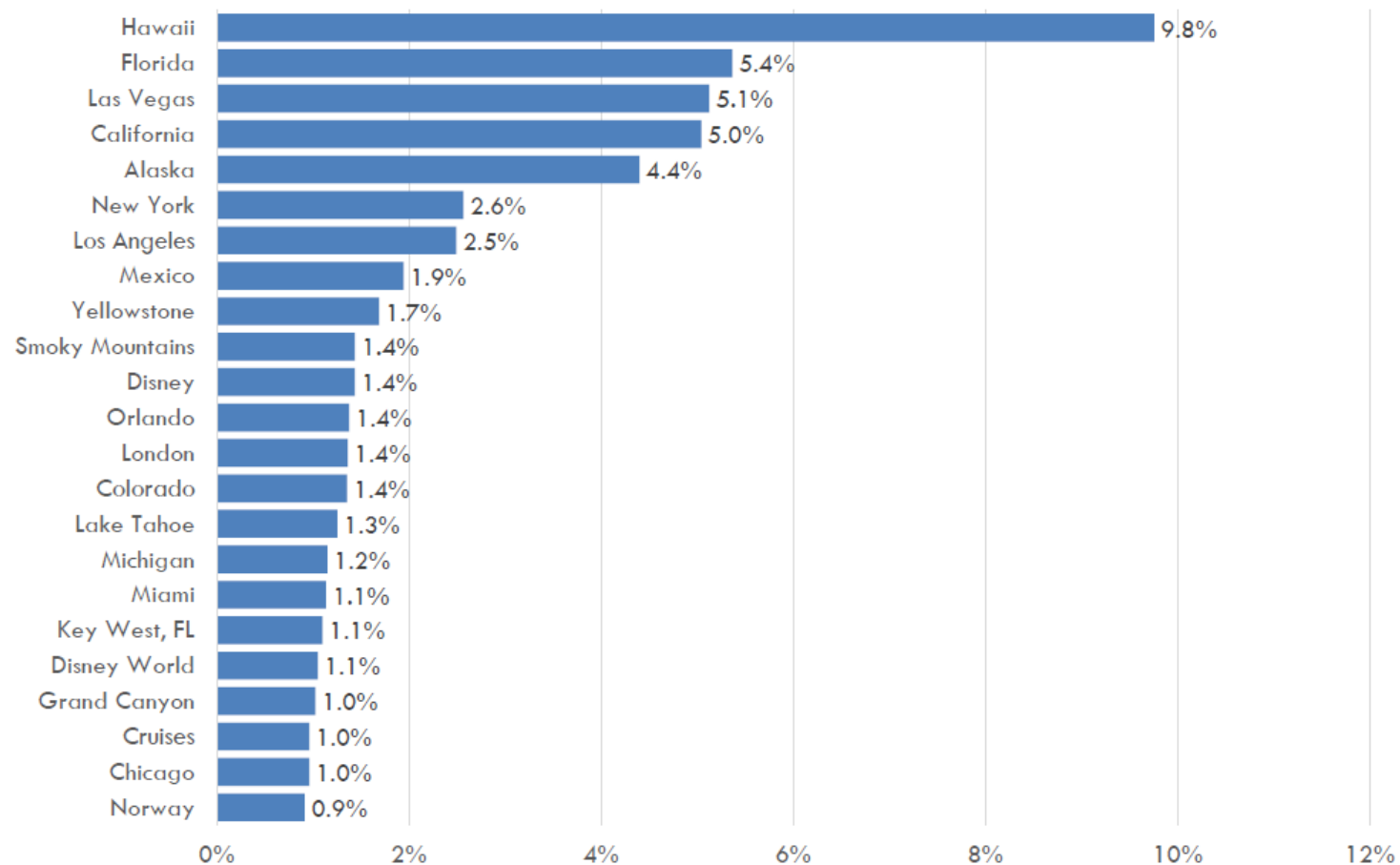
(Base: Waves 43 data. Respondents who day-dreamed about taking a leisure trip in the past week, 353 completed surveys. Data collected January 1-3, 2021)



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)

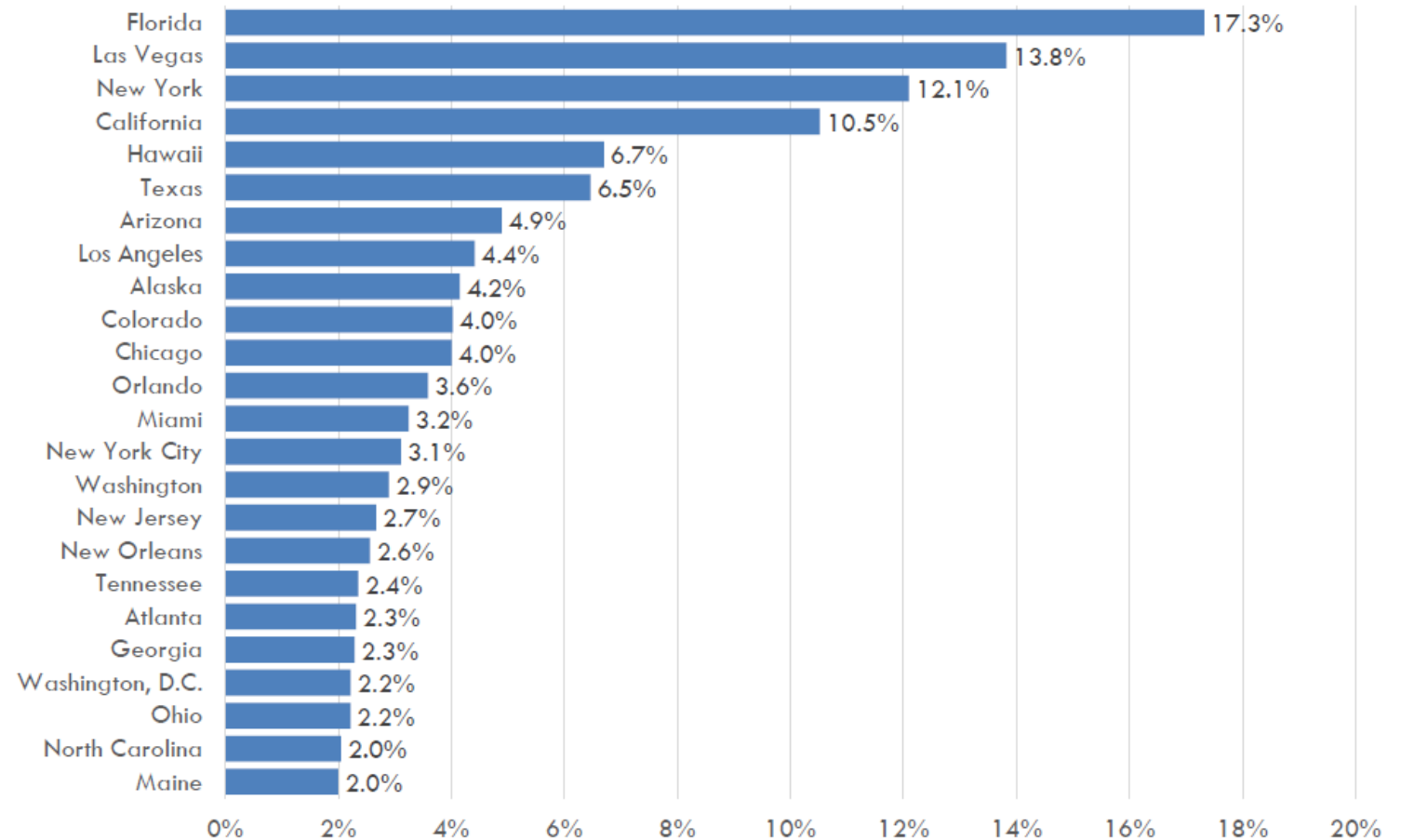


Most Desired Domestic Destinations for 2021 (unaided)

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

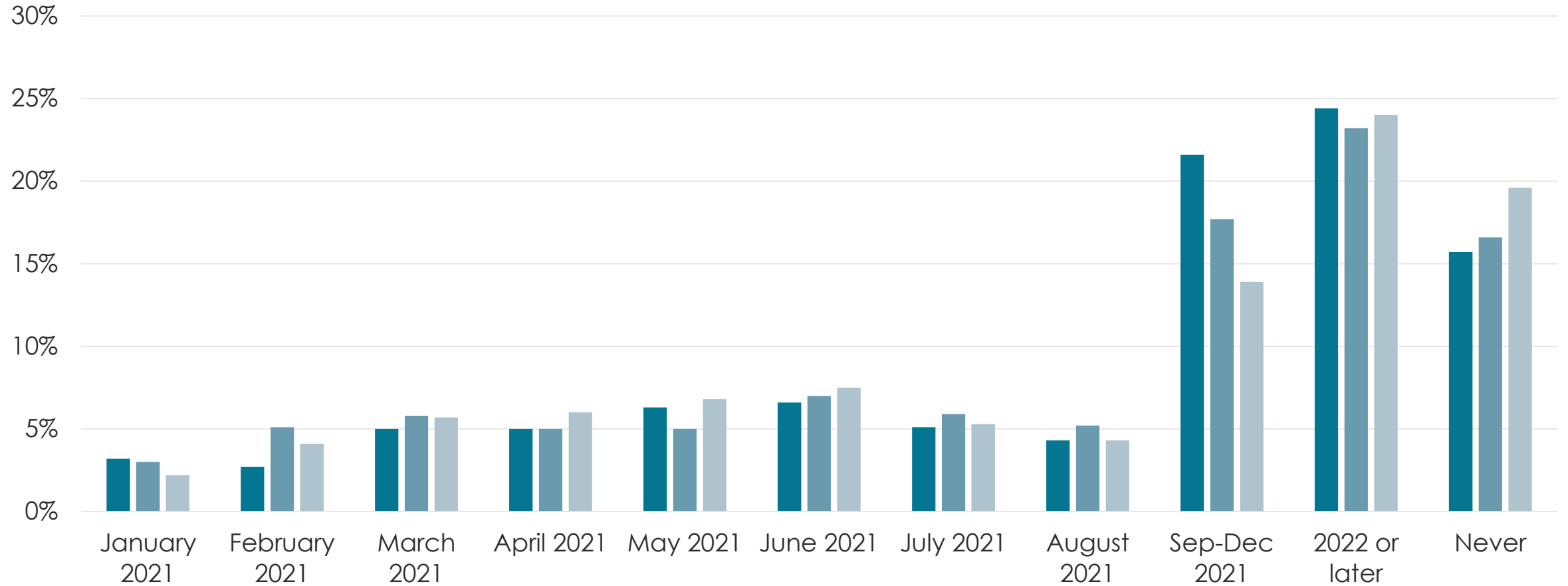
(Please only include destinations in the United States)

(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



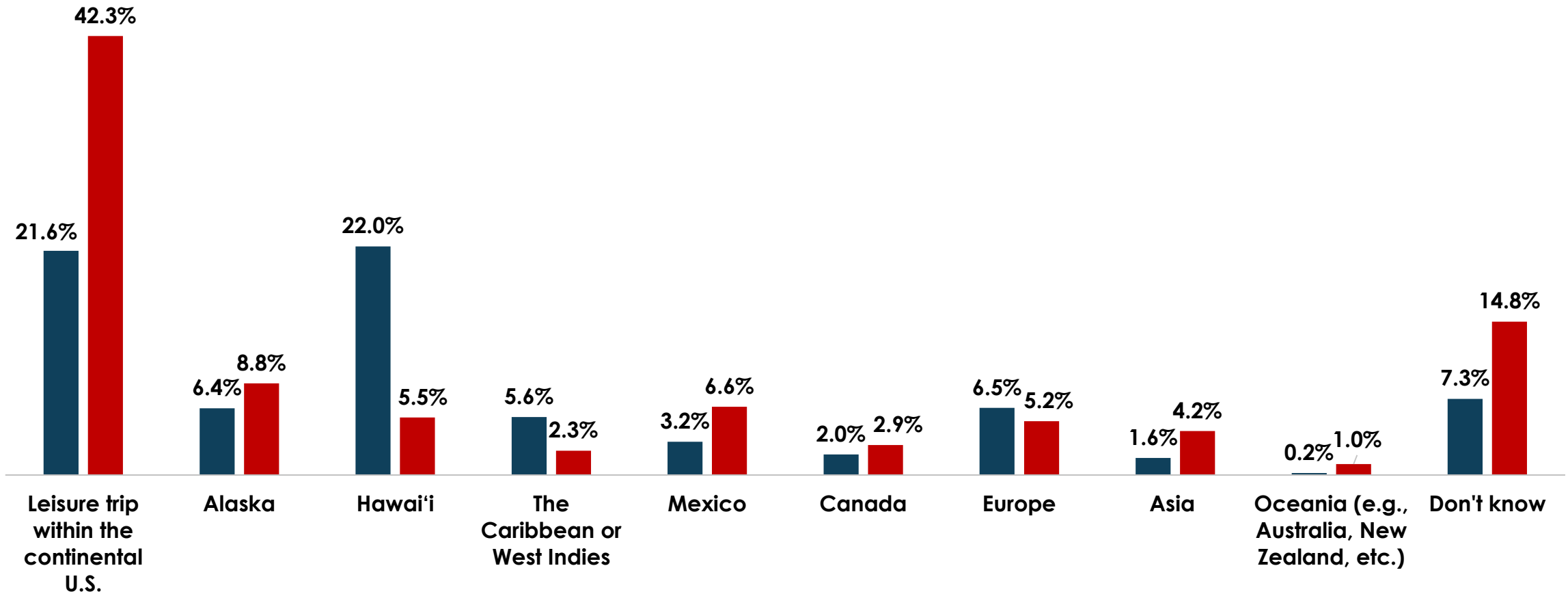
Scheduled U.S. Seats to Hawai‘i –Jan – March 2021

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

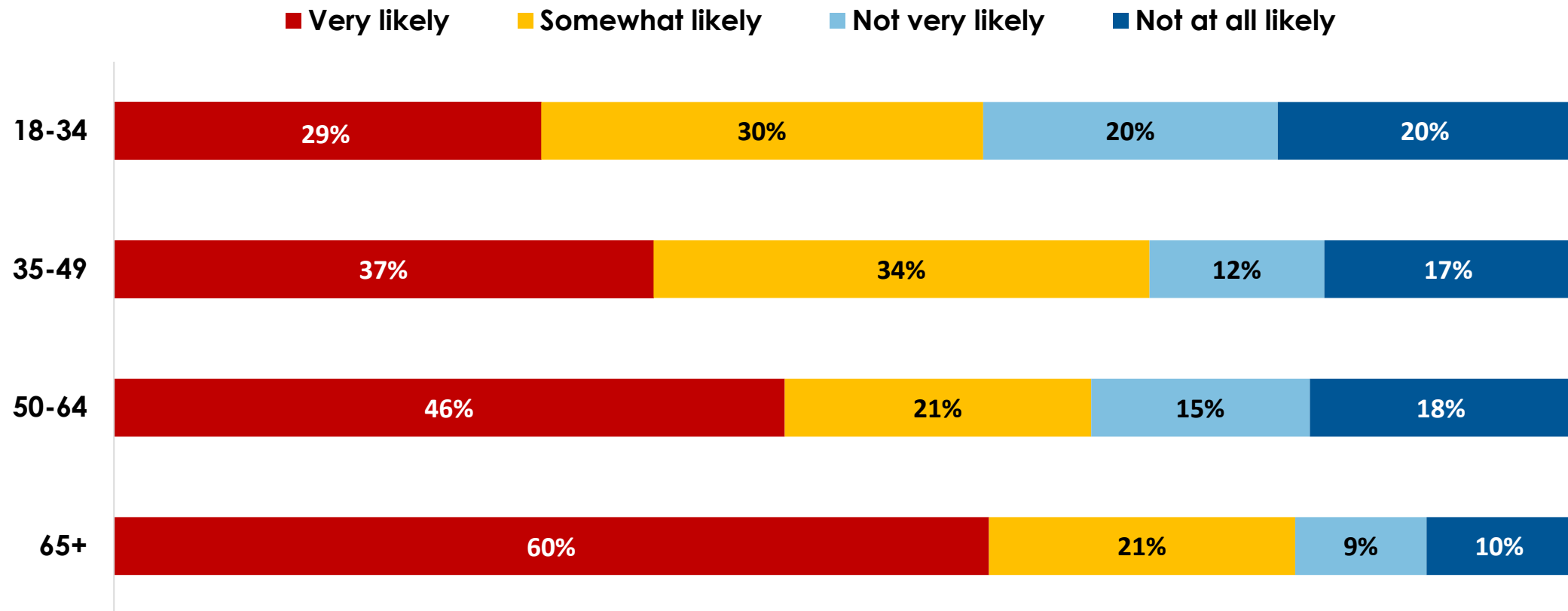
Leisure trip - next destination

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



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

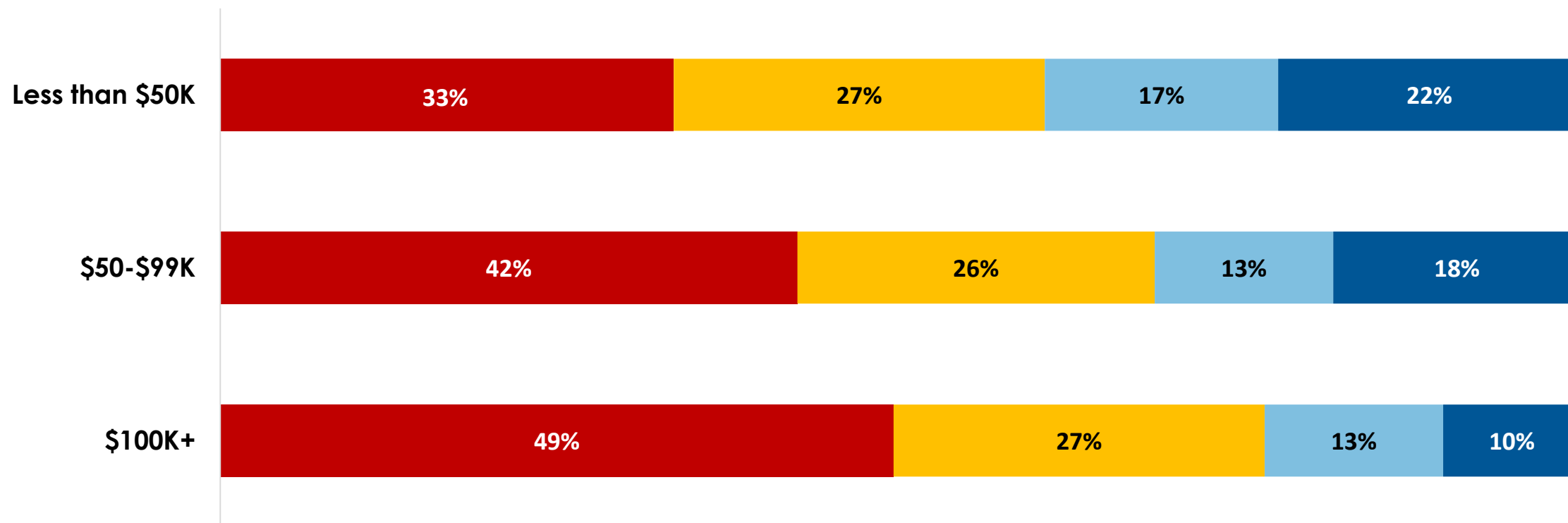
By Age



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 18th.
- 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

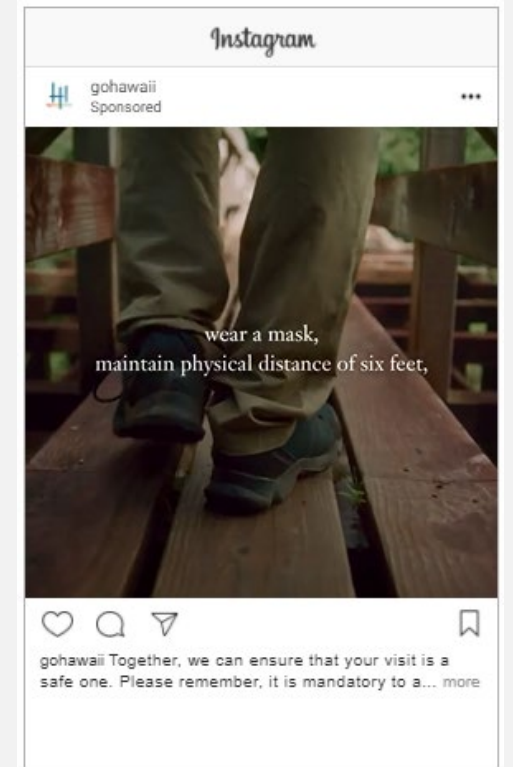
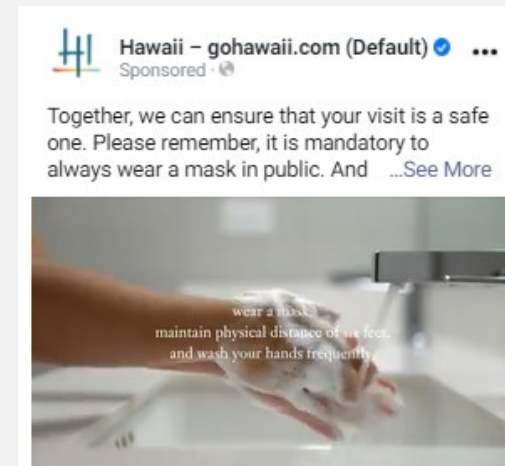
VISITORS

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

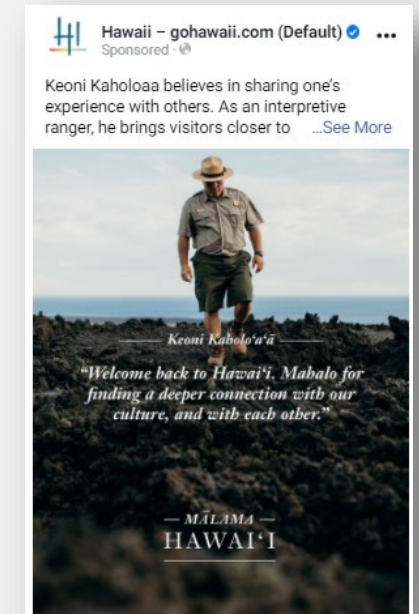
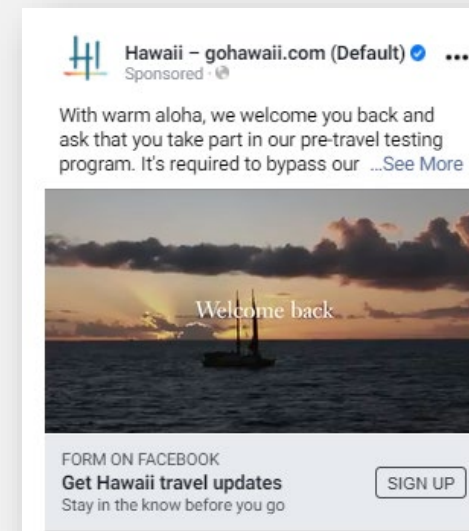
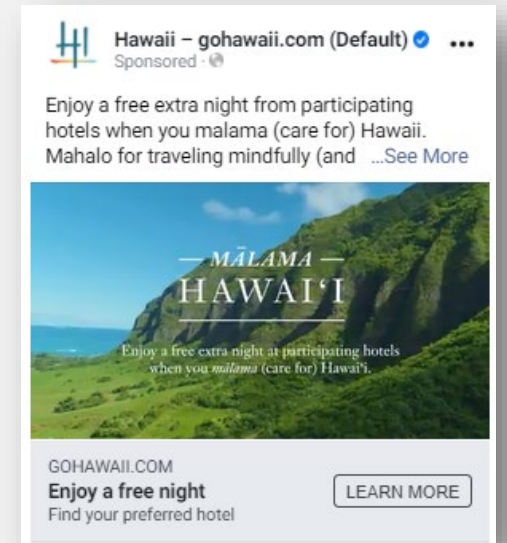
FLIGHT: 10/15 – 12/20

REACH: 17.9MM

IMPRESSIONS: 55.5MM

VIDEO VIEWS: 33.6MM

ENGAGEMENTS: 249K

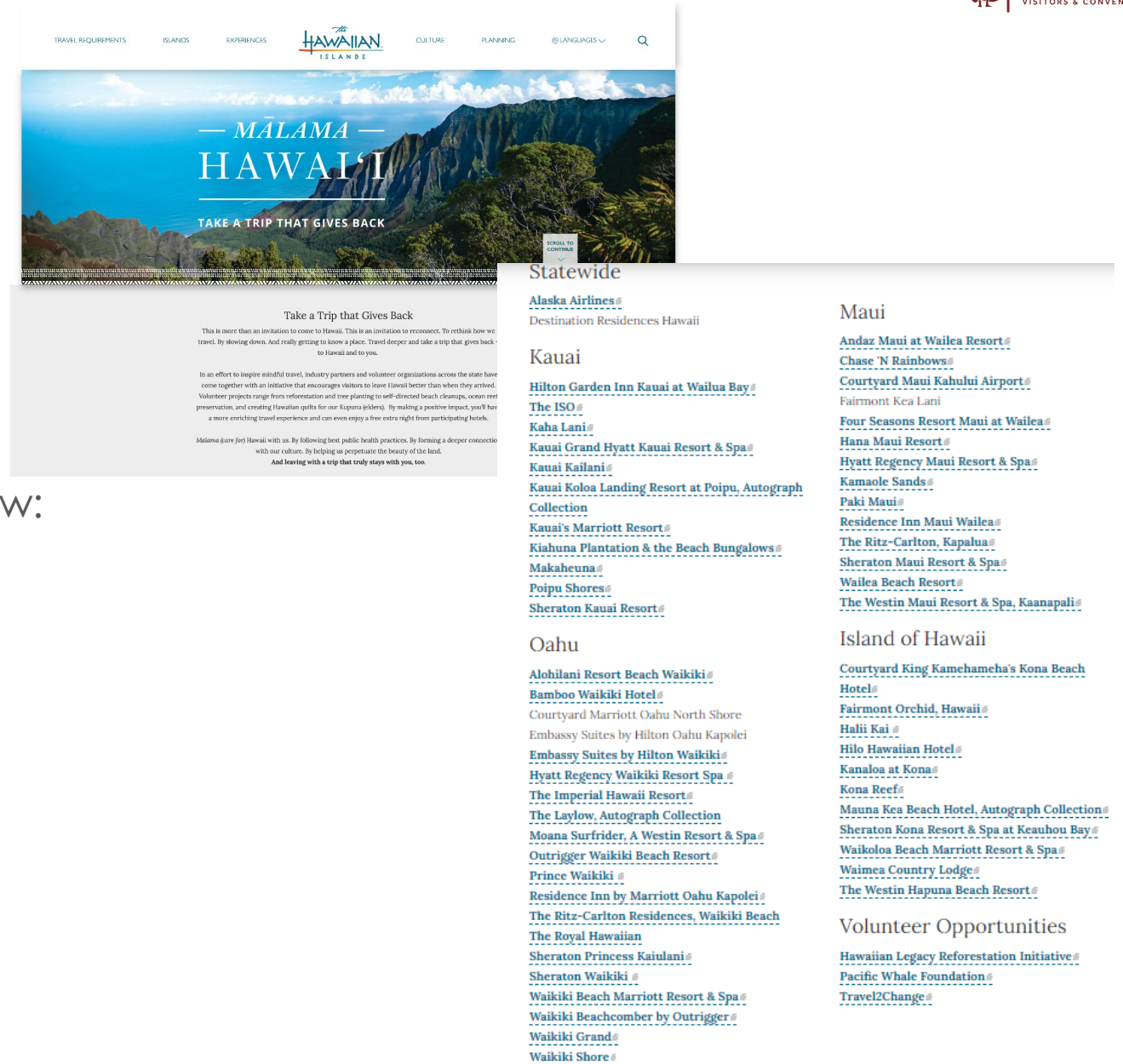




Mālama Hawai'i Program Update

Mālama Hawai‘i Partners

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



TRAVEL REQUIREMENTS ISLANDS EXPERIENCES **THE HAWAIIAN ISLANDS** CULTURE PLANNING @LANGUAGES Q

— MĀLAMA —
HAWAII
TAKE A TRIP THAT GIVES BACK

SCROLL TO CONTINUE

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. To slow 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 perpetuate 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](#) #



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



Earned Media Coverage

 Skift.

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



