



*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, 24 Pepona 2021, 10:30 a.m.
Wednesday, February 24, 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_KsHUdTzXRYGCe45Pq5DFfQ

*Ma hope o ke kāinoa 'ana, e ho'ouna 'ia ka leka uila
hō'ōia 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 27 Ianuali 2021*
Approval of Minutes of the January 27, 2021 Marketing Standing Committee Meeting
3. *Hō'ike No Ka Papahana Ho'okele Mo'olelo A Ke Kime Hokona Honua*
Presentation of the Brand Management Plan by each Global Marketing Team:
 - Hawaii Visitors and Convention Bureau (HVCB) by Jay Talwar
 - Hawaii Tourism Japan (HTJ) by Eric Takahata
 - Hawaii Tourism Canada (HTCAN) by Susan Webb



4. 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. Inā pono ke kōkua ma muli o kekahi kīnānā, e ho'omaopopo aku iā Ariana Kwan (973-2254 a i 'ole ariana.kwan@gohta.net), he 'ekolu lā ma mua o ka hālāwai ka lohi loa.

Members of the public are invited to view the public meeting and provide written testimony on any agenda item. Written testimony may be submitted prior to the meeting to the HTA by email to ariana.kwan@gohta.net; Any person requiring an auxiliary aid/service or other accommodation due to a disability, please contact Ariana Kwan (973-2254 or ariana.kwan@gohta.net) no later than 3 days prior to the meeting so arrangements can be made.

Agenda Item #2:

Approval of Minutes of the
January 27, 2021

HTA Marketing Standing Committee Meeting



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

David Y. Ige
Governor

John De Fries
President and Chief Executive Officer

**MARKETING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY
Wednesday, January 27, 2021
Virtual Meeting**

MINUTES OF MARKETING STANDING COMMITTEE MEETING

COMMITTEE MEMBERS PRESENT:	Kelly Sanders (Chair), Fred Atkins, George Kam, Kyoko Kimura, and Benjamin Rafter
COMMITTEE MEMBER ABSENT:	Sherry Menor-McNamara
HTA STAFF PRESENT:	John De Fries, Keith Regan, Pattie Herman, Marc Togashi, Kalani Ka'anā'anā, Caroline Anderson, Jennifer Chun, Ariana Kwan, Marisa Yamane, and Carole Hagihara
GUESTS:	Representative Richard Onishi, Senator Glenn Wakai, Jay Talwar, John Monahan Eric Takahata, and Irene Lee
LEGAL COUNSEL:	Gregg Kinkley

1. Call to Order and Pule:

Chair Kelly Sanders called the meeting to order at 10:31 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. Kalani Ka'anā'anā, HTA Director of Hawaiian Cultural Affairs & Natural Resources, opened the meeting with a pule, honoring the former Hawai'i County Mayor Billy Kenoi who passed away yesterday.

2. Approval of Minutes of the December 16, 2020 Marketing Standing Committee Meeting:

Chair Sanders requested a motion to approve the minutes of the December 16, 2020 HTA Marketing Standing Committee meeting. George Kam made a motion, which was seconded by Fred Atkins. The motion was unanimously approved.

3. Presentation and Discussion of the Travel Agency Booking Pace and General Market Research Trends

Chair Sanders recognized Jennifer Chun, HTA Director of Tourism Research, to provide an update on the travel agency booking pace and general market research trends. Ms. Chun reported that she's getting the data from the Global Agency Pro, which has access to over 90% of the world's travel agency airline transactions. She said that there were lower levels of bookings from the U.S. for January than last month's meeting and the volume gets lower for February and March. She noted that there were fewer visitors coming from Japan due to the limited number of flights and to Canada and Australia, wherein direct flights to Hawai'i continue to be unavailable. She added that most of the bookings are from the U.S. to O'ahu and to Maui. Ms. Chun said that the booking pace for 2021 continues to be relatively low. She reported that there are a fair number of U.S. visitors planning a trip to Kaua'i and Hawai'i Island but very few people traveling to Moloka'i and Lāna'i. Ms. Chun said that the booking pace reports is published weekly.

Ms. Kimura asked if more cancellations came in than new bookings. Ms. Chun affirmed.

4. Presentation by Hawaii Tourism Korea Regarding the State of and Progress of the Travel Testing Partners

Chair Sanders recognized Irene Lee, Country Director for Hawai'i Tourism Korea (HTK), to provide an update on the state of and progress of the Trusted Testing Partners (TTP) in Korea. Ms. Lee reported that the number of confirmed COVID-19 cases in Korea has reached 76,429 and that the social distancing measures of 2.5 meters are extended until the end of January. She noted that Koreans are advised to avoid non-essential overseas travel until February 15 and that the requirement for PCR test negative results for all incoming passengers from U.K. and South Africa has started on January 8. She said that Korea has secured 20 million doses of vaccines and is preparing for a vaccination management system. She added that the government will begin free vaccination for priority groups in February, followed by plans of intensive implementation of vaccination during the third quarter of 2021 to form a collective immunity.

Ms. Lee reported that the Korean economy is projected to grow as major travel agencies started to sell overseas travel and early-bird products. She added that the Ministry of Culture, Sports and Tourism has increased budget allotment to \$1.37 billion USD in support for the tourism industry. Ms. Lee reported that a survey shows a high percentage of Koreans planning to travel after vaccination and that travel is by far the most desired activity when the pandemic ends. She said that Instagram has surpassed Facebook as the most used social networking service application by Koreans in 2020.

Ms. Lee said that Hawai'i will start to allow a negative COVID-19 test within 72 hours of their arrival, enabling travelers to avoid quarantine. She added that four hospitals in Korea agreed to be testing partners with the State of Hawai'i and that more testing partners will be announced in the coming weeks. She explained that these partners will provide testing services designated by the Korea Disease Control and Prevention Agency and that the test kits and medical devices will be approved by the Ministry of Food and Drug Safety.

She reported that aside from the launch of TTP program, HTK will develop a co-op promotion to highlight the 'Mālama Hawai'i Campaign' and a safe and joy tours positioning the islands as a safe travel destination in conjunction with promoting the Mālama Hawai'i concept. She added that HTK will maximize social media presence on the TTP program thru social media campaigns in high-profile channels.

Ms. Kimura asked for clarifications if visitors from Korea still need to be quarantined for 14 days when they go back from Hawaii to Korea. Ms. Lee responded that all passengers coming from the U.S. are required to quarantine for 14 days.

5. Presentation by HVCB on Market Insights, Updates on Air Seats to the Destination for the First Half of 2021, and on Calendar Year 2021 as it Relates to Certain Assumptions and Approaches, Including but Not Limited to 1st Quarter Programs

Chair Sanders recognized Jay Talwar, Chief Marketing Officer for the Hawai'i Visitors and Convention Bureau (HVCB), to give an update on market insights, air seats to the destination for the first half of 2021 and on calendar year 2021 as it relates to certain assumptions and approaches, including but not limited to first quarter programs. Mr. Talwar reported that according to The Harris Poll for COVID-19 in the U.S., people are most fearful of global recession, of leaving home for essential errands, and of a new wave. He added that they have lesser fear of dying and of losing their jobs. He said that with U.S. residents expressing levels of concern for unsafe travel on commercial airlines, about contracting the virus and for the national economy, tourism recovery will start slowly. He noted that though Hawai'i came in top for destinations daydreamed about, it came in fifth as the most desired domestic destination for 2021, with Florida gaining the top list.

Mr. Talwar noted that the air trips of U.S. leisure travelers start fairly low during the first quarters of 2021 but is seeing a significant increase from September to December 2021. He said that there are a fair number of U.S. seats scheduled to Hawai'i on January and February and the number of seats for March is exceeding that of last year. Mr. Talwar added that there are more avid travelers eyeing for Hawai'i as the next destination for leisure than long distance travelers under 55 years old who prefer to travel within the Continental U.S. He

reported that there is less likelihood for younger people (18 to 49 years old) and low income groups (less than \$50,000) to get the COVID-19 vaccine once available.

Mr. Talwar said that booking demand remains low for January and February but there are signs of life for spring break and more meaningful demand starting in June. He added that 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. He said that with fares so low overall, it is challenging to stimulate demand based on fare and that forecasting has been extremely challenging with booking windows. He noted that there are new markets: United (Newark to Maui) and Hawaiian (Orlando and Austin to Honolulu) that are opening for the first time, and that American (Charlotte to Honolulu) has resumed flights. He noted that overall, domestic bookings to Hawaii are up. He added that cancellations are expected for Q1 2021, but it will significantly lessen for Q2.

Mr. Talwar reported that social media platforms, namely Facebook, Instagram, YouTube and Pinterest are used to promote the Mālama Hawai'i campaign. He noted that the campaign received a huge amount of engagement and video views. He said that they were able to tie up with 80 partners for Mālama Hawai'i and counting while volunteer programs continue to grow. He noted that the target audience for 2021 will be avid explorers who are known to be mindful, responsible and respectful. He added that they will continue to research on how to effectively invite avid explorer to Mālama Hawai'i.

Mr. Talwar said that HVCB will work with airlines, hotels and other partners with regards to coordination, cooperation and budget extensions. He added that they will use creative messaging to share stories of Hawaii ambassadors who are connected with community and/or volunteer organizations. He also showed a video of player vignettes of the PGA Tour to the Hawaiian Islands.

6. Presentation by HTJ on Market Insights, Updates on Airlines Booking Pace and on the Leisure and Group Segments and Programs to be Engaged in Q1 and Calendar Year of 2021

Chair Sanders recognized Eric Takahata, Managing Director of Hawai'i Tourism Japan (HTJ), to provide an update on market insights, updates on airlines booking pace and on the leisure and group segments and programs to be engaged in Q1 and calendar year of 2021 in Japan. Mr. Takahata reported that Japan's COVID-19 confirmed cases have significantly increased. He noted that in comparison to Hawai'i, Japan has a lower number of COVID-19 cases per capita (100,000) which is 277 while Hawaii has 1,760. He added that Japan

declared its second State of Emergency on 11 prefectures which will last until February 7. He said that a PCR test is required for entry to Japan and that the business or residence tracks are suspended. He added that vaccinations will start late February.

Mr. Takahata reported that the Cabinet has approved its third supplemental budget boosting Japan's government total spending to exceed ¥175 trillion (\$1.6T USD). He said that the economy on the third quarter grew an annualized real 22.9% from the previous quarters. He added that private consumption soared to 5.1%.

Mr. Takahata reported that the Go to Travel Campaign has been suspended until February 7 but will resume until the end of June 2021. He noted that the travel industry is in discussions with the Ministry of Travel with regards to the "Managed Travel" concept developed by JATA to introduce as the new normal travel style for Japanese. He said that the 14-day self-quarantine and pre-travel test for returning residents continue to be the major roadblocks in the industry. He noted that the recovery forecast for the travel industry indicates positive trends for summer until fall of 2021. He said that bookings for January and February remain low but airlines and travel agencies are in collaboration with HTJ in conducting quarterly promotions and campaign activities for 2021. He noted that more Japanese plans to visit Hawaii after reopening and in June to December 2021.

Mr. Takahata reported that there are 84 trusted testing partners at present and that an additional of 27 more are expected to join on December 22. He said that for Mālama Hawai'i campaign, they conducted live video promotions on January 8 and January 22.

Ms. Kimura stated that with the Go to Travel Campaign extended and no recovery can be expected until Q3, she suggested that most money be saved to Q3 like the Summit or Expo. Mr. Takahata responded that it can't be postponed anymore since it has been postponed once before.

Ms. Kimura asked if the 880,000 arrival by the end of the year is realistic since just by looking at the 1,800 arrival of December 2020, the HTA can't expect any more for the first 6 months of 2021. Mr. Takahata responded that the number is from DBEDT.

7. Adjournment:

The meeting adjourned at 12:00 pm.

Respectfully submitted,



Sheillane Reyes, Recorder

Agenda Item #3:

Presentation of the Brand Management Plan by
each Global Marketing Team:

Hawaii Visitors and Convention Bureau (HVCB)
by Jay Talwar



HAWAI'I

VISITORS & CONVENTION BUREAU™

HAWAI'I TOURISM AUTHORITY
MARKETING STANDING
COMMITTEE MEETING

FEBRUARY 24, 2021

MARKET CONDITIONS

MARKET CONDITIONS

According to the Conference Board forecast for 2021, the first quarter will see GDP growth of 2.0 percent with an annual of 4.1 percent for 2021. This scenario assumes:

- a) new cases of COVID-19 peak in early Q1 with no additional widespread lockdowns implemented,
- b) vaccines are deployed gradually in Q1 but the volume accelerates into Q2 and beyond,
- c) the stimulus package is fully deployed in late Q1 or early Q2,
- d) labor markets rebound in Q2 and Q3,
- e) the political transition does not result in a hit to consumer or business confidence.

These assumptions are for a steady acceleration of economic activity that peaks in the summer months as consumers eagerly spend on services and goods that they had forgone in 2020. The U.S. monthly economic output returns to pre-pandemic levels in August 2021.



KEY TRENDS

COVID-19 Cases and Deaths

As of February 9, 2021, the U.S. has seen over 27 million cases and more than 468,00 deaths from COVID-19 virus. Hawai'i has recorded 26,531 cases of infection and 418 deaths.

COVID-19 Vaccinations

As of February 8, 2021, there have been 42,417,000 million doses administered in the U.S. and in Hawai'i, 210,250 doses have been administered.

CDC Travel Requirements

All air passengers coming to the United States, including U.S. citizens, are required to have a negative COVID-19 test result or documentation of recovery from COVID-19 before they board a flight to the United States. At this time, there is no similar mandate for domestic travel.



OUTBOUND

U.S. Outbound Travel Forecast (Published Fall 2020)

- According to U.S. Travel, 1.905 billion trips will be made by U.S. residents in 2021, up 19% from 2020
- 1.676 billion of those trips will be for leisure while only 229 million trips will be made for business-related purposes
- Air trips among U.S. travelers will be up 15.7% in 2021, compared to -62.3% in 2020

AIR SEATS

U.S. Seat Forecast

Due to the volatility of the COVID-19 pandemic, US carriers are not finalizing schedules more than 6 weeks out. As of February 10, 2021, the forecasted seats for non-stop transpacific flights to Hawai'i are:

Total Domestic Seats – February – April 2021 2,081,336 seats up +30.9% over 2020

U.S. West: 1,824,291 seats up +30.9% over 2020

U.S. East: 257,045 seats up +22.7% over 2020

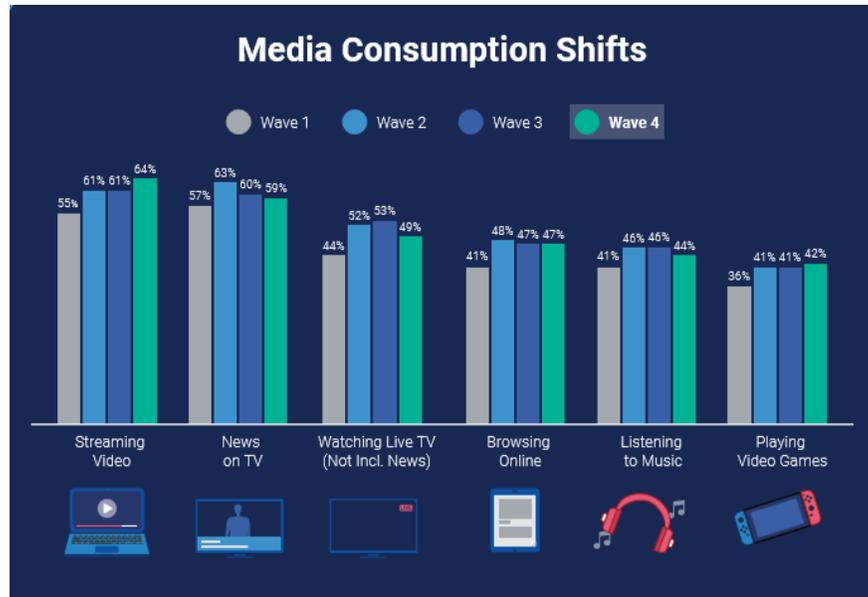
The forecast for the remainder of 2021 will be additional seats added back to market as demand dictates.



TRAVEL TRENDS

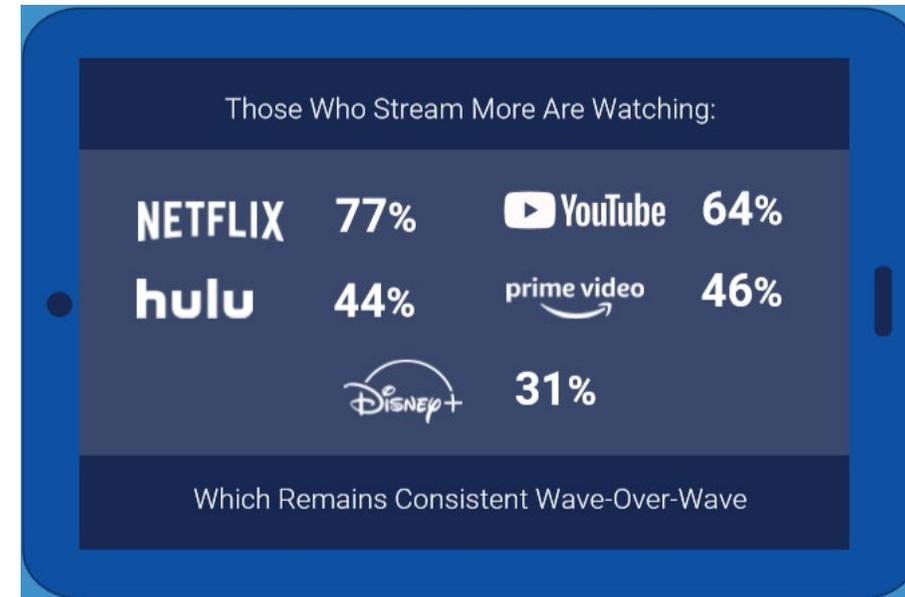
U.S. MEDIA CONSUMPTION DURING COVID-19

During the height of COVID-19 pandemic, streaming video continues to increase



Streaming Has Increased Significantly as the Outbreak Has Progressed

Almost two-thirds of consumers (64%) are using streaming services MORE than before the outbreak



AVID EXPLORER MEDIA CONSUMPTION

Media Channel	Usage	Usage Highlights
 Digital	Heavy	<ul style="list-style-type: none"> Spends on avg. 28 hours per week online and considers it it's most trusted media source (141 Index)
 OTT / Streaming	Heavy	<ul style="list-style-type: none"> Prefers subscribing to streaming video services because it's worth the money (181 Index) and enjoys their original programming (158 Index) Amazon Prime is their top streaming service used in the past 30 days (174 Index)
 Outdoor	Moderate to Heavy	<ul style="list-style-type: none"> 3rd highest medium against the target and notice large formats like Billboards Able to amplify awareness in select markets that have a high tendency of OOH
 Radio	Moderate to Light	<ul style="list-style-type: none"> Tunes in to terrestrial radio during the AM/PM drive on their commute to work (108 Index)
 TV	Light	<ul style="list-style-type: none"> Target's Linear TV consumption has drastically decreased and are now light viewers (34 Index)

GENERAL TRAVEL SENTIMENT

Safety concerns remain

- 54 percent of U.S. travelers say they would feel somewhat or very unsafe traveling on a commercial airline right now
- Less than half (49%) of U.S. travelers feel safe traveling outside of their home community

Optimistic near-term travel outlook

- For the first time since the start of the pandemic, more travelers (38%) expect the coronavirus pandemic to get better in the next month, compared to 27 percent who think it will get worse.
- 81 percent of travelers have travel plans in the next six months, the highest since before the initial lockdowns in March 2020.

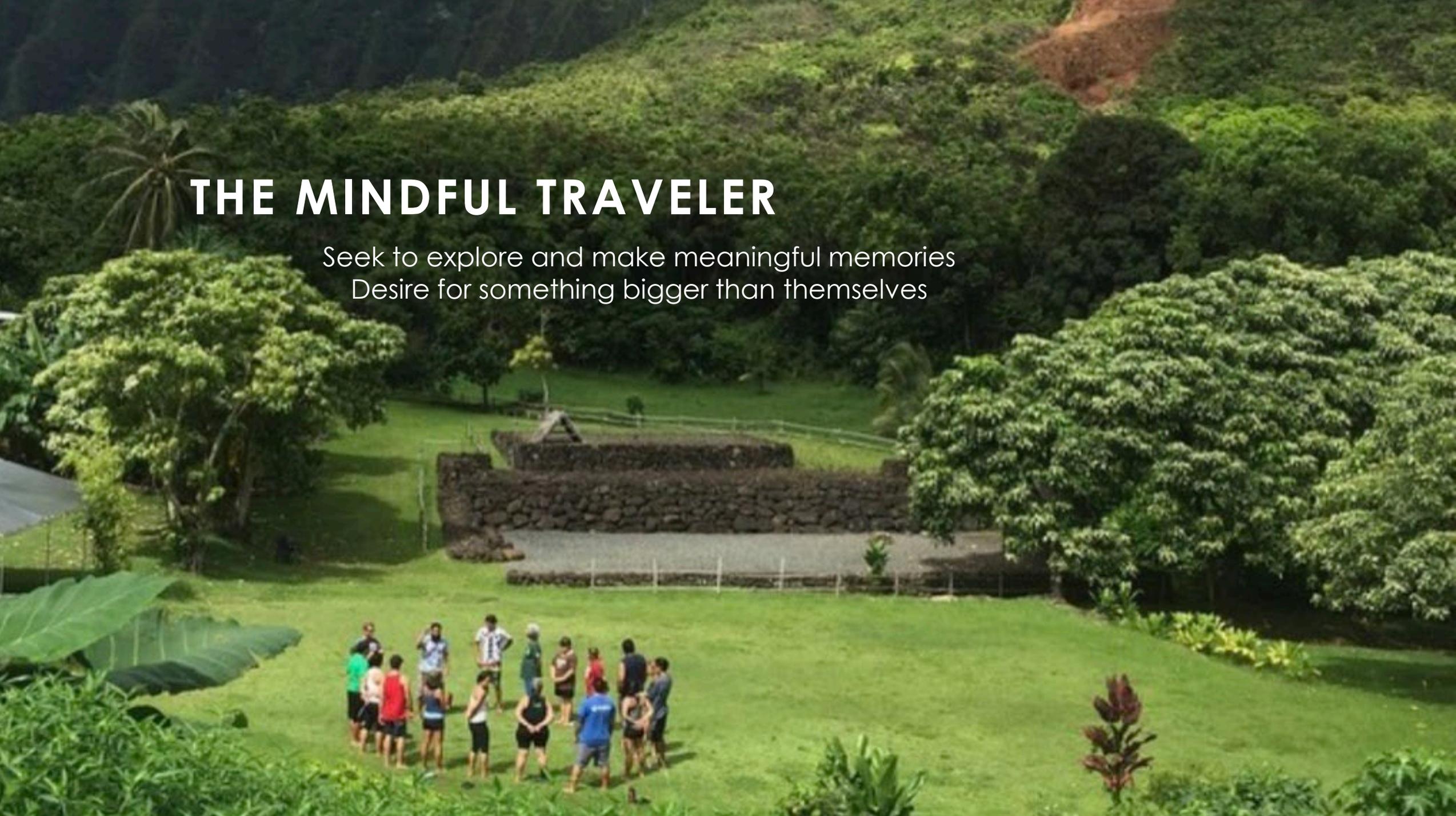




TARGET AUDIENCE

THE MINDFUL TRAVELER

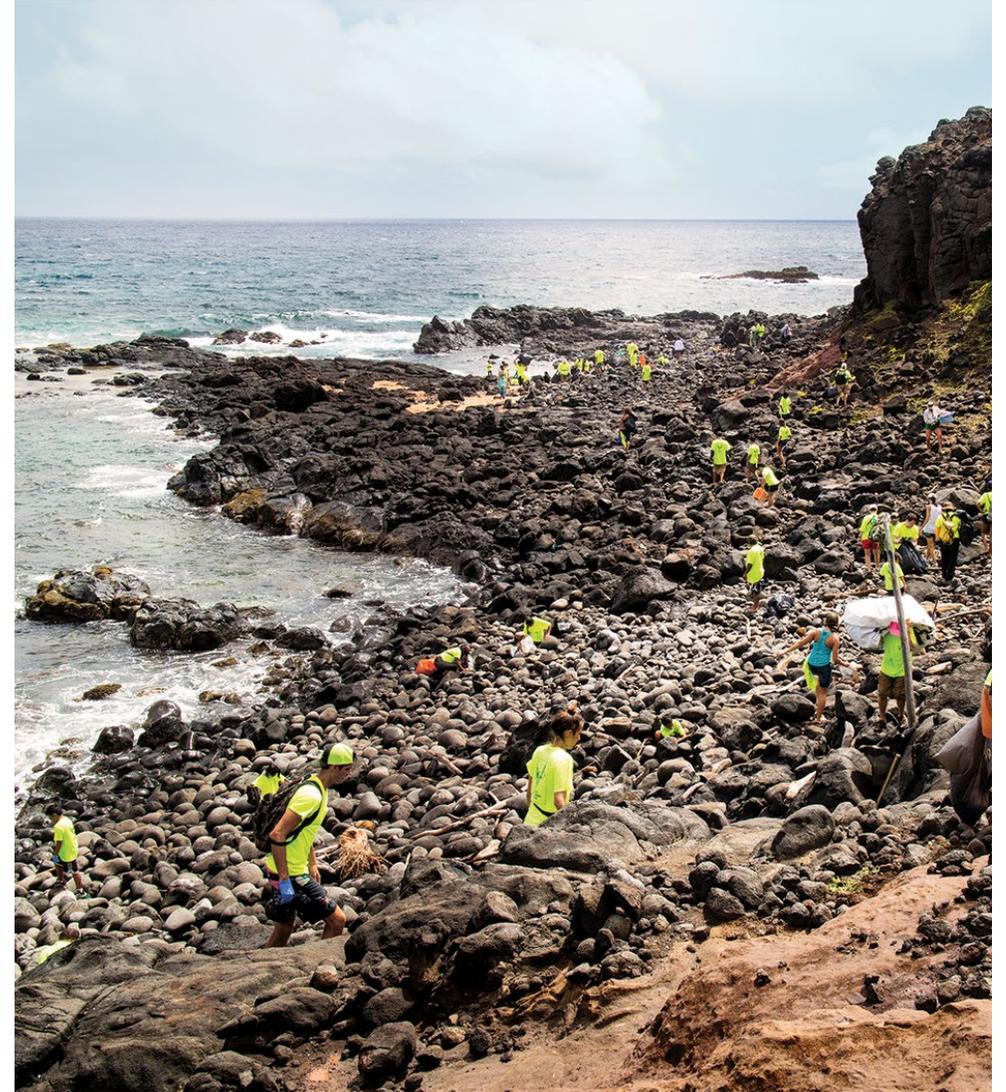
Seek to explore and make meaningful memories
Desire for something bigger than themselves



TARGET AUDIENCE

The Mindful Traveler – respectful,
responsible, environmentally conscious

- Adults 25-54
- Household Income 100K+
- Eco-Conscious
- Participates in 2+ activities while traveling
- Repeat Hawai'i Visitors
- Nationwide





CONSUMER STRATEGY



**Mālama
Hawai'i**

APPROACH

- Continue to stay in touch with resident's position on tourism
- Work with HTA Team for insight from the community study (DMAP)
- Develop marketing strategies based on HTA's pillars

Hawaiian
Culture

Community

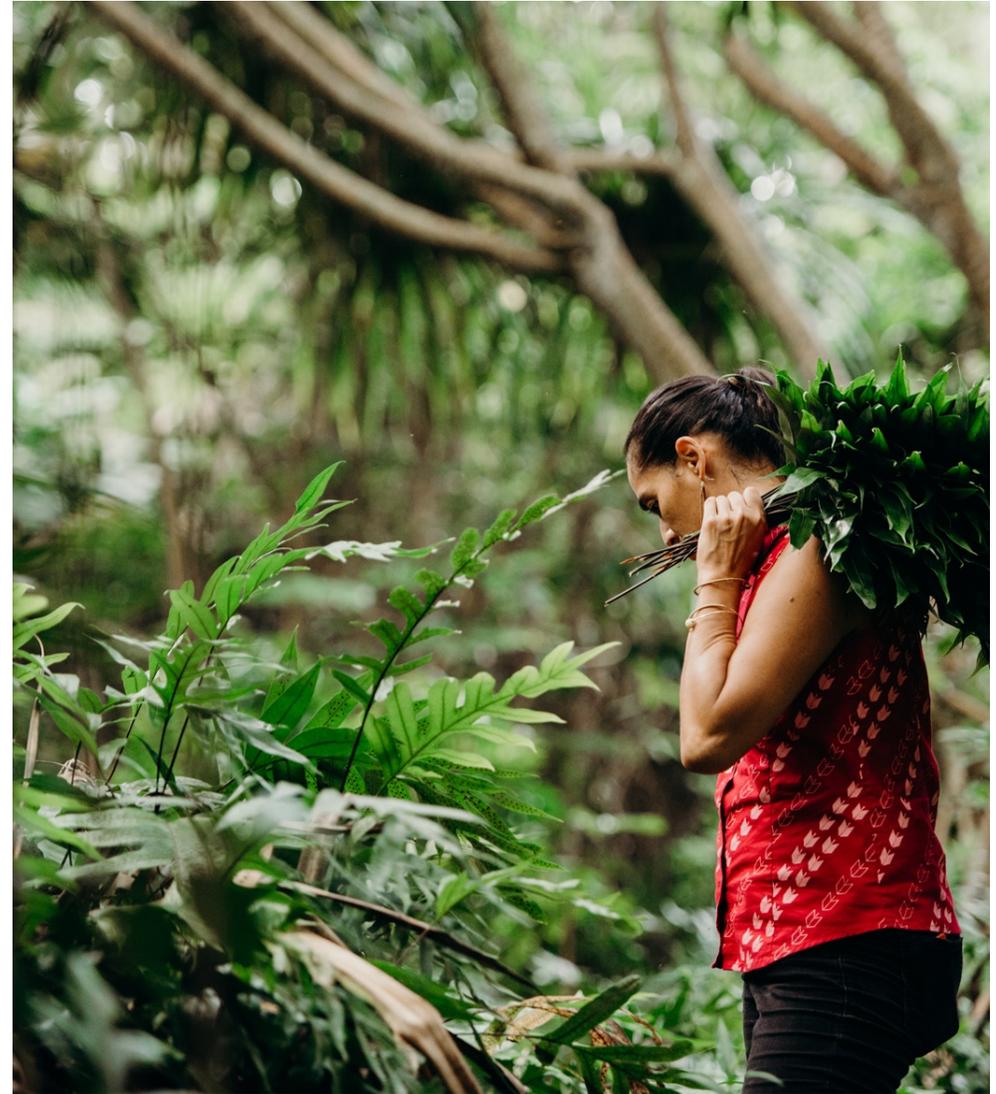
Natural
Resources

Marketing



CREATIVE MESSAGING

- *Mālama Hawai'i* – the evolution of the *Hawai'i Rooted* and *Kuleana* campaigns
- Sharing stories of Hawai'i ambassadors who are connected with community and/or volunteer organizations



PAID MEDIA

OTT (over the top) TV

To reflect the evolution of the target's media consumption, leverage OTT to take advantage of this increase in our post-COVID world

Video & Display

Serve Mālama Hawai'i messaging against the target by utilizing video and display to granularly reach users cross-device (desktop, mobile/tablet):

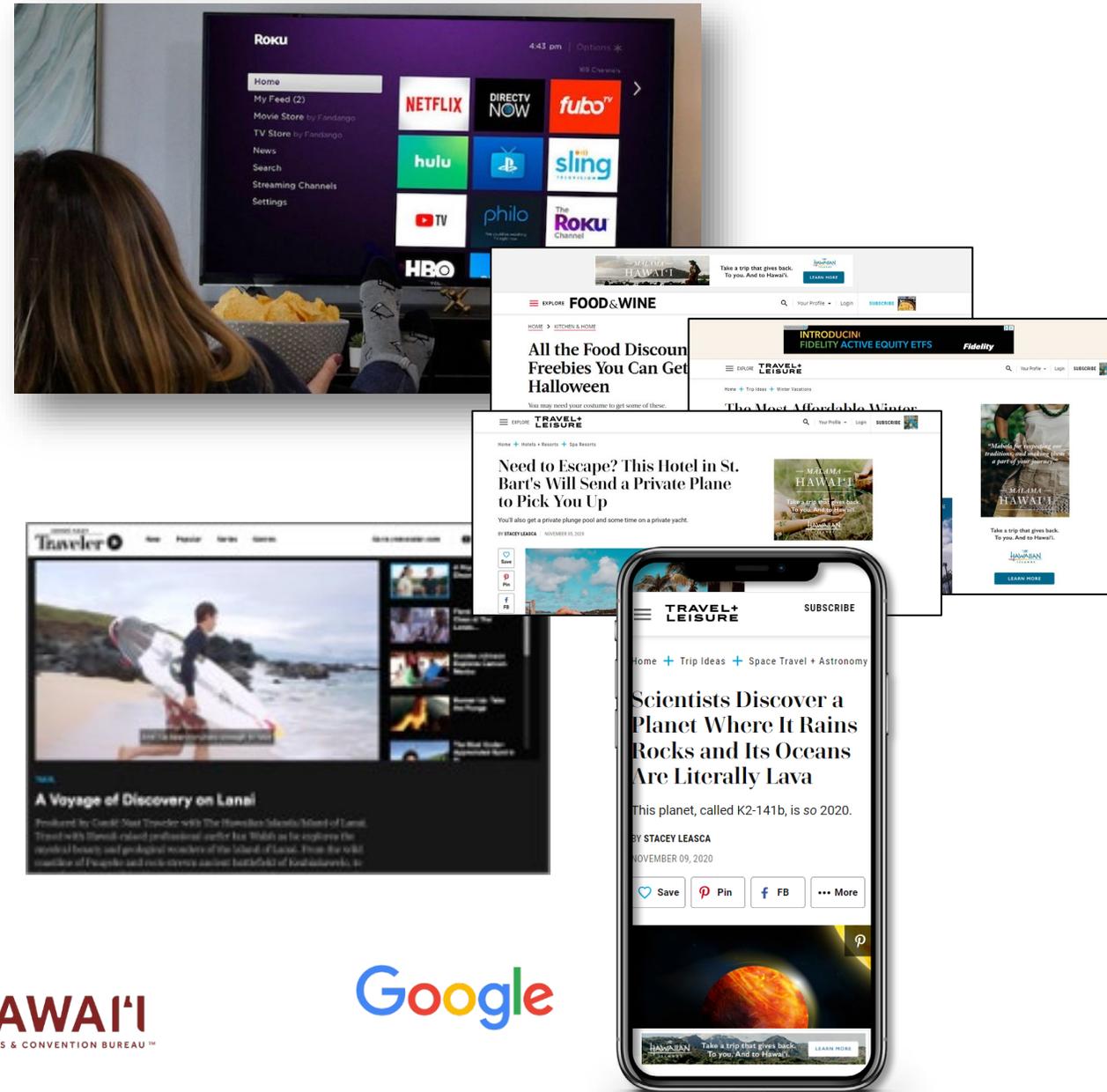
- Travel habits
- Demo (age, HHI)
- Environmentally conscious
- Geography
- Contextual

Native

Utilize custom-video content creation and the native voice of credible media partners to help tell the Mālama Hawai'i message in ways that resonate with the target and appear less like traditional advertising.

Search

Google, which accounts for 92% of all search traffic to gohawaii.com will be utilized to drive qualified traffic to our site.



SOCIAL MEDIA

Create a balanced mix of social posts, purpose-fit for priority platforms

Facebook & Instagram

Promote Mālama Hawai'i posts and follow up with a steady cadence of supporting content throughout the campaign

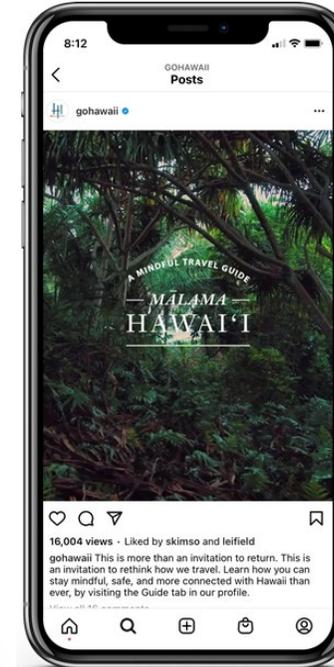
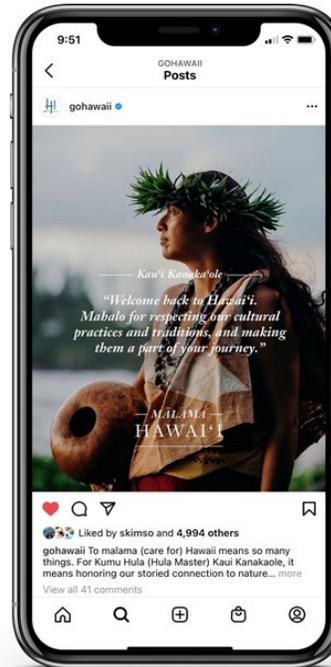
Kuleana/travel safety videos will be served on-island to visitors and residents

YouTube

Serve True View pre-roll ahead of videos watched by our audiences—especially videos related to community engagement, mindfulness, or slow travel

Pinterest

Show up interactively on a platform where people come to feel inspired, positive, safe (and politics-free) while they dream and plan

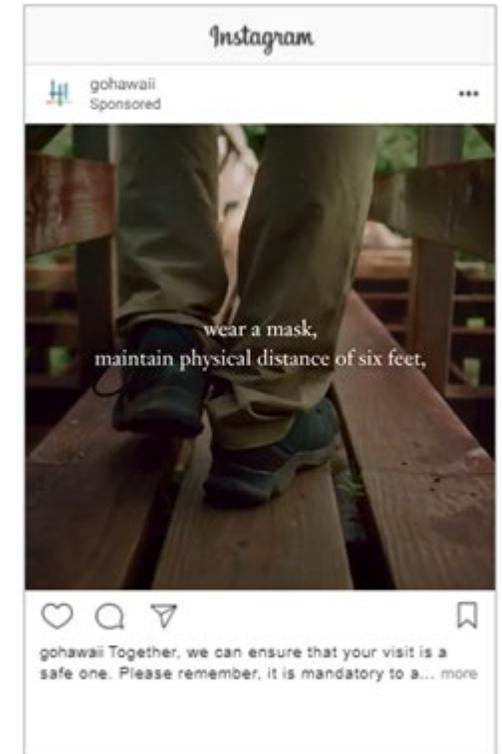
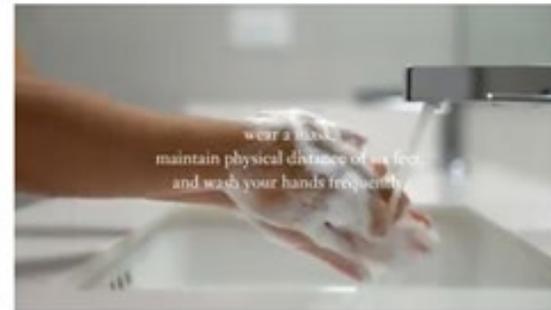


ON-ISLAND KULEANA MESSAGING

- Continue running COVID-19 specific post-arrival Kuleana video to visitors and flighted to residents
- Outreach to partners to extend distribution



Together, we can ensure that your visit is a safe one. Please remember, it is mandatory to always wear a mask in public. And ...See More



EARNED MEDIA / PR

Hot 100 List

- Refined to reach target consumer audience in tandem with paid
- Focus on digital media, West Coast and National outlets

Rich Storytelling

- Mindful travel, culture, natural beauty

Coordinated Messaging

- Statewide, Island Chapters, island ambassadors, and industry partners

TRAVEL+ LEISURE

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

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



Help out in Hawaii and get a free hotel stay



TRADE STRATEGY

ROLE OF TRADE IN DESTINATION SELECTION

Data supports the importance of travel advisors in destination selection

- Pre-pandemic data:
 - 55% said they were likely to use an advisor to help choose a destination
 - 85% say they use advisors because of their destination knowledge
- An August 2020 study said “travelers are relying on advisors to narrow their options and cut through the clutter”
 - 65% of US travelers say that the information and insights agents can provide is their most crucial draw for using a travel advisor.
- Travel advisors are a trusted source of information now more than ever
 - 64% of travelers are more satisfied with the information they have received from their travel advisor than airlines and hotels. (*Strategic Vision's 2021 Pulse of the Industry Survey, Jan. 2021*)

ENGAGING THE TRADE TO ACHIEVE MARKETING GOALS

- New content development aligned with the Hawai'i target traveler types of culture, culinary, outdoor and sustainable/responsible tourism
 - Digital Guides will be downloadable content within the travel agent portal and in a format that can be shared with clients
- Style Guide provided to trade partners to ensure use of HVCB approved imagery and messaging
- Consortia agreements will be executed with select partners enabling HVCB to reach consumers that are known travelers and align with the Hawai'i target traveler
- Turnkey digital marketing program for travel advisors will be launched to complement HVCB's cooperative program with key stakeholders



TRADE PARTNERSHIPS & COOP PROGRAMS

- HVCB initiated cooperative marketing programs
 - Select wholesale partners and industry partners invited to participate to drive conversion
 - Stakeholders provide special offers
 - Travel advisors with known customer base have the opportunity to close the sale
- Partnerships with Northstar Marketing Solutions and TA Connect enable ongoing targeted, time-sensitive communication to qualified travel advisors
- HVCB virtual events feature destination and Hawai'i supplier presentations and resource resources
- Partnerships with trusted industry organizations such as The American Society of Travel Advisors (ASTA) and The Travel Institute allow access to industry studies and training opportunities



Aloha Robyn

Two important announcements were made by Governor David Ige and details are included in the attached [press release](#).

- Beginning next week **Tuesday, November 24**, travelers wishing to bypass the 14-day mandatory quarantine must have their negative COVID-19 test results - from a [trusted testing partner](#) - prior to departure for the State of Hawaii. If test results are not available before boarding the final leg of the trip, the [traveler must quarantine for 14 days or the length of the stay](#), whichever is shorter.
- The state has announced Canadian Trusted Testing Partners program, which will launch mid-December.

Please share this information as broadly as possible to your customers.

Regards,

John Manahan
President & CEO
Hawaii Visitors and Convention Bureau

© 2020 Hawaii Tourism Authority | www.gohawaii.com | 1-800-GoHawaii (1-800-464-2924)



Thank you for your interest in the virtual event, [The Hawaiian Islands Virtual Event: Malama Hawaii](#). Although the live broadcast may be over, you can relive the experience, keep the conversation going, and learn more with the following:

Both days of the event are now available on-demand, access the recordings below:

Day 1: <https://onlinexperiences.com/Launch/Event/ShowKey=12064>

Day 2: <https://onlinexperiences.com/Launch/Event/ShowKey=120649>

Also be sure to visit our [Resource Center](#)! Take a look at all the resources provided by the Hawaii Visitors and Convention Bureau (HVCB), Island Chapter representatives and wholesale, hotel and activity partners.

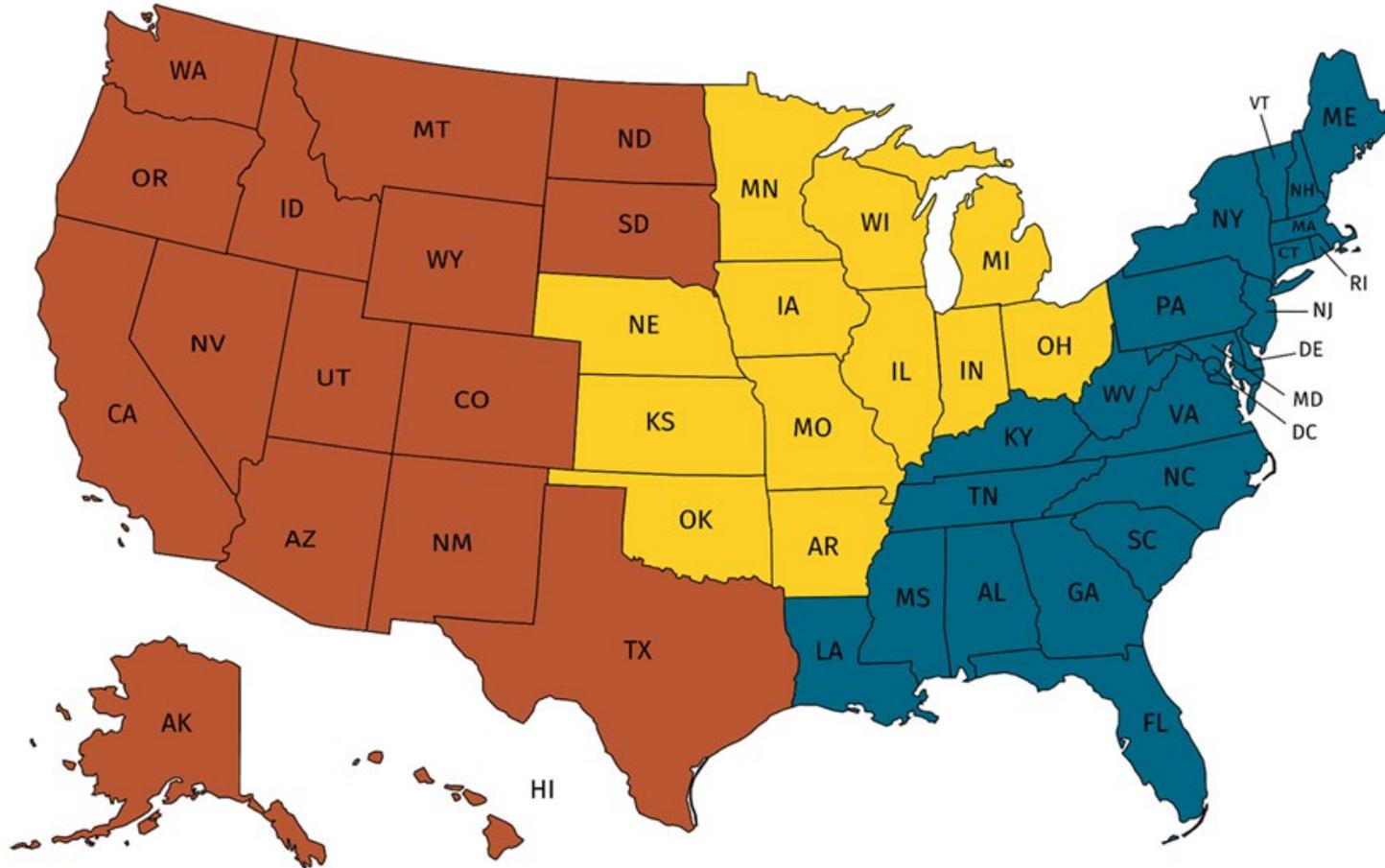


February 24, 2021



MCI

MCI



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'Elele Program

Debbie Zimmerman
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MCI

Citywide Target Audience

- Medical
- Scientific
- Technology
- Engineering
- Finance
- Legal

Single Property Target Audience

- Healthcare / Medical
- Scientific
- Technology
- 3rd Party
- Finance
- Insurance

MCI

Citywide Lead Development Strategy

- Target short-term corporate citywide groups for 2022 – 2026 need years
- Rank and solicit Hawai'i's universe of citywide accounts for optimal placement
- Elevate the 'Elele Program to involve local Hawai'i residents to assist in soliciting and booking citywide conventions

Single Property Lead Development Strategy

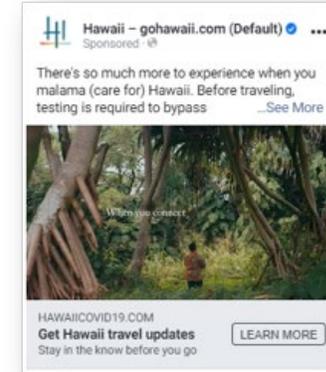
- Target small group meetings to respond to accelerate restarting of MCI group business
- Continue to solicit market segments that are generating single property lead opportunities (corporate, incentive, 3rd Party, healthcare)
- Promote Hawai'i as MCI destination via digital events and customer FAMS

RESPONSIBLE TOURISM

RESPONSIBLE TOURISM

HVCB's marketing efforts are based on the Hawaiian concepts of *mālama Hawai'i* and *kuleana* – our responsibility to protect and support the local community; native Hawaiian culture, practices and places; and Hawai'i's natural beauty and resources which are the components that make up HTA's pillars.

Embracing this responsibility includes finding the type of traveler who share the same values and then reaching them with a marketing message that invites them to be a part of this special place and to honor its people and places while they are visiting.



MĀLAMA HAWAI'I PROGRAM

As hotels around the state reopen their doors, let's come together as one 'ohana and provide our guests with the opportunity to engage in a volunteer project to help regenerate the natural beauty and culture of Hawai'i, and provide them with a free night if they do so.

'ALOHI LANI RESORT WAIKIKI BEACH

UNFORGETTABLE, SOULFUL HAWAII PACKAGE

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

Your soulful journey includes:

- Stylish Ocean View or Premier Ocean Front accommodations
- Every **5th Night is complimentary**
- **One Day Luxury Car Rental** by Enterprise Rent-A-Car®
- **North Shore Tree Planting experience** at Gunstock Ranch. Learn more about the 'Alohilani forest and our pledge to plant 100,000 trees.
- **\$200 resort dining credit** valid at Morimoto Asia, Morimoto, or Sweet Pool & Bar
- Ocean cultural blessing for two
- Valid for travel November 1 - December 23, 2021 (blackout dates may apply)



Planter's Experience

Come to Gunstock's Hawaiian Legacy Forest to plant a Monarch Milo tree. Bring your friends or the whole family and make a difference together.



Malama Hawai'i Package

We welcome travelers with an open heart and an invitation to Malama Hawai'i. Simply put, malama means to take care – of our earth, each other and ourselves.

In partnership with a statewide alliance led by the [Hawai'i Tourism Authority](#), Prince Waikiki has joined the Malama Hawai'i initiative to encourage mindful and, ultimately, regenerative tourism by giving travelers an opportunity to stay an extra day when you participate in a voluntourism activity. The Malama Hawai'i initiative not only helps us protect and preserve Hawai'i for the future, but also gives travelers an opportunity for a meaningful and enriching travel experience.

With our Malama Hawai'i package, you'll receive a **Sustainable Coastlines Hawai'i** DIY Cleanup Kit, offering a safe and healthy way for you to give back to the local community with your own beach clean up. Book your stay now, and receive the following plus more:

- **Every 4th Night Free**
- **Waived Deposit Charge** (Daily Savings of \$37 + Applicable Taxes)
- **Two Prince Waikiki "Malama Hawai'i" T-Shirts**
- **Sustainable Coastlines Hawai'i DIY Cleanup Kit** (One kit per stay)
- **Daily Self-Parking** (1 Vehicle Per Room)

Terms & Conditions:

A night minimum stay required. Book from November 2, 2020 - December 30, 2021 for travel between November 2, 2020 - December 31, 2021 (inclusive). One night deposit required at time of booking. Not valid or combinable with any other offers, discounts, promotions or negotiated rates. Promotion is subject to availability and rates will fluctuate. Cancellations must be made 24 hours in advance to avoid penalties. Room rates are based on single or double occupancy and subject to taxes. Blackout dates and restrictions may apply.

BOOK NOW



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

LEARN MORE



Statewide

[Alaska Airlines](#) Destination Residences Hawaii

Kauai

- [Hilton Garden Inn Kauai at Waialeale Bay](#)
- [The ISO](#)
- [Kala Lani](#)
- [Kauai Grand Hyatt Kauai Resort & Spa](#)
- [Kauai Kallani](#)
- [Kauai Koloa Landing Resort at Poipu, Autograph Collection](#)
- [Kauai's Marriott Resort](#)
- [Kiahuna Plantation & the Beach Bungalows](#)
- [Makaleona](#)
- [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 Laysan, 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](#)

Mauai

- [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 Kua](#)
- [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](#)
- [TravelChange](#)



BMP TIMELINE

2021 CONSUMER CALENDAR

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Production	Evolution of Malama Hawaii								2022 Campaign			
Messaging					1st Media Flight Evolution of Malama Hawaii Dates TBD			2nd Media Flight Dates TBD				
PGA Tour	PGA Tour											
Equinox						Equinox						
Media Vehicles												
Earned												
Social												
Organic												
Paid												
Advertising												
OTT												
Digital												
Search - Google												
Enewsletters												
Gohawaii.com												



2021 TRAVEL TRADE CALENDAR

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Tradeshows	1			1		1	1	2	3	7	2	1
Appointments						40	200	10	40		100	
Educational Sessions	7	5	4	2		6	6	3	4	5	2	
FAMS						2			1	2	1	
Meetings with Hawai'i Industry Partners	2	3	4	3	1	1	2	4	2	1	1	1

2021 MCI CALENDAR

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Trade Shows	1	1	2			2		2	1	2	2	3
Appointments	20	20	40			40		40	20	40	40	60
FAMS									4			
Education Sessions		1		1								
Sales Calls	160	160	160	160	160	160	160	160	160	160	160	160
Digital Marketing												

BMP BUDGET

BMP BUDGET – LEISURE US

	Q1	Q2	Q3	Q4	Annual
Advertising	\$624,926	\$2,746,065	\$2,928,968	\$1,926,161	\$8,226,120
PR & Promotions	\$229,707	\$328,475	\$636,825	\$481,573	\$1,676,580
Trade Marketing	\$92,325	\$442,625	\$385,025	\$315,525	\$1,235,500
Research	\$22,500	\$22,500	\$57,500	\$22,500	\$125,000
Hawaiian Culture Integration	\$1,000	\$17,200	\$75,300	\$13,000	\$106,500
Admin Costs	\$817,860	\$830,815	\$792,305	\$794,321	\$3,235,300
Total	\$1,788,318	\$4,387,680	\$4,875,923	\$3,553,080	\$14,605,000

BMP BUDGET - MCI

	Q1	Q2	Q3	Q4	Annual
Advertising	\$6,000	\$10,000	\$18,000	\$18,000	\$52,000
PR & Promotions	\$24,000	\$35,000	\$96,000	\$103,000	\$258,000
Trade Marketing	\$53,500	\$54,950	\$13,000	\$56,000	\$177,450
Research	\$13,500	\$13,500	\$13,500	\$ 13,500	\$54,000
Hawaiian Culture Integration					
Admin Costs	\$452,709	\$455,509	\$460,709	\$484,623	\$1,853,550
Total	\$549,709	\$568,959	\$601,209	\$675,123	\$2,395,000



BMP PERFORMANCE MEASURES

BMP PERFORMANCE MEASURES - ADVERTISING

LEISURE MEASURES	Annual Target	Semi-Annual Targets	
	2021	Jan-Jun	Jul-Dec
Consumer Ad Measures			
<i>Advanced TV/OTT Reach</i>	6.0%	4.0%	3.0%
<i>Print Reach</i>	n/a	n/a	n/a
<i>Digital Reach</i>	13.0%	6.0%	9.0%
<i>Radio Reach</i>	n/a	n/a	n/a
<i>TV Gross Impressions</i>	n/a	n/a	n/a
<i>Print - Total Audited Circulation</i>	n/a	n/a	n/a
<i>Digital Gross Impressions - Total Audience</i>	60,598,466	17,311,819	43,286,647
<i>Digital Video Gross Impressions - Total Audience</i>	21,383,855	12,092,470	9,291,385
<i>Radio Gross Impressions</i>	n/a	n/a	n/a
<i>Digital Out of Home Gross Impressions</i>	n/a	n/a	n/a
Travel Trade Ad Measures			
<i>Print - Total Audited Circulation</i>	0	0	0
<i>Digital Gross Impressions - Total Audience</i>	0	0	0
Consumer Shows			
<i>No. of Shows</i>	n/a	n/a	n/a
<i>Show Attendance</i>	n/a	n/a	n/a

BMP PERFORMANCE MEASURES - PUBLIC RELATIONS

LEISURE MEASURES	Annual Target	Semi-Annual Targets	
	2021	Jan-Jun	Jul-Dec
Public Relations Measures			
<i>No. of Media/PR Calls</i>	233	72	161
<i>No. of Press Releases Issued</i>	25	10	15
...Publicity Value			
<i>Print</i>	\$450,000,000	\$225,000,000	\$225,000,000
<i>Online</i>	\$175,080,000	\$87,540,000	\$87,540,000
<i>Broadcast</i>	\$192,000,000	\$96,000,000	\$96,000,000
...Number of Impressions			
<i>Print</i>	900,000,000	450,000,000	450,000,000
<i>Online</i>	348,000,000,000	174,000,000,000	174,000,000,000
<i>Broadcast</i>	2,460,000,000	1,230,000,000	1,230,000,000
...Media FAMs/Press Trips			
<i>No. of Group Media FAMs</i>	2	1	1
<i>No of Articles Generated</i>	27	6	21
<i>No. of Individual Press Trips</i>	52	8	44
<i>No of Articles Generated</i>	59	12	47

BMP PERFORMANCE MEASURES - TRAVEL TRADE & INDUSTRY COLLABORATION

LEISURE MEASURES	Annual Target	Semi-Annual Targets	
	2021	Jan-Jun	Jul-Dec
Leisure Travel Trade			
<i>...Trade Shows</i>			
<i>No. of Trade Shows</i>	20	3	17
<i>No. of Appointments</i>	480	40	440
...Travel Trade FAMs			
<i>No. of Travel Trade FAMs</i>	6	2	4
<i>No. of Participants</i>	30	10	20
...Trade Education			
<i>No. of Trade Education Sessions</i>	39	19	20
<i>No. of Participants</i>	4,125	3,100	1,025
<i>No. of Agents Completed Online Training Program</i>	5,537	2,737	2,800
Industry Collaboration			
<i>No. of Meetings with Hawai'i Industry Partners</i>	TBD		
<i>No. of Hawai'i Industry Partners Met With</i>	TBD		

BMP PERFORMANCE MEASURES - SOCIAL MEDIA

LEISURE MEASURES	Annual Target	Semi-Annual Targets	
	2021	Jan-Jun	Jul-Dec
Social Media Metrics			
FACEBOOK			
<i>Total Impressions Gained</i>	30,664,326	9,630,838	21,033,488
<i>Total Interactions Gained</i>	5,099,234	1,642,960	3,456,274
<i>Total Est Ad Recall</i>	5,570,240	2,734,040	2,836,200
<i>Total Fan Count</i>	N/A	N/A	N/A
<i>Increase in Fans</i>	N/A	N/A	N/A
<i>Total Posts</i>	29	5	24
INSTAGRAM			
<i>Total Impressions Gained</i>	33,176,044	10,269,014	22,907,029
<i>Total Interactions Gained</i>	1,877,696	584,491	1,293,205
<i>Total Est Ad Recall</i>	2,892,953	1,538,999	1,353,954
<i>Total Fan Count</i>	N/A	N/A	N/A
<i>Increase in Fans</i>	N/A	N/A	N/A
<i>Total Posts</i>	35	5	30
PINTEREST			
<i>Total Impressions Gained</i>	11,087,268	5,722,461	5,364,807
<i>Total Engagements Gained</i>	238,376	123,033	115,343
YOUTUBE			
<i>Total TrueView Impressions Gained</i>	41,461,007	16,781,836	24,679,171
<i>Total TrueView Video Views Gained</i>	21,700,691	8,783,613	12,917,078

BMP PERFORMANCE MEASURES - MCI

MCI MEASURES	Annual Target	Semi-Annual Targets	
	2021	Jan-Jun	Jul-Dec
MCI Trade			
... <i>Trade Shows</i>			
<i>No. of Trade Shows</i>	16	6	10
<i>No. of Appointments</i>	320	120	200
... MCI FAMs			
<i>No. of MCI FAMs</i>	4	0	4
<i>No. of Participants</i>	30	0	30
... MCI Education			
<i>No. of MCI Education Sessions</i>	2	2	0
<i>No. of Participants</i>	100	100	0
<i>No. of MCI Sales Calls</i>	1,920	960	960
MCI Room Nights			
<i>Total Citywide MCI Tentative Room Nights</i>	Room Night goals will be established post quarantine period of COVID-19. Goals will be set based on permitted attendance numbers and flight availability.		
<i>Total Citywide MCI Definite Room Nights</i>			
<i>Total Citywide MCI New to Hawai'i - Definite Room Nights</i>			
<i>Total Single Property MCI Tentative Room Nights</i>			
<i>Total Single Property MCI Definite Room Nights</i>			
<i>Total Single Property MCI New to Hawai'i - Definite Room Nights</i>			

HTA KEY PERFORMANCE INDICATORS

HTA KEY PERFORMANCE INDICATORS

	Targets
PPPD\$	Meet/Exceed DBEDT Forecasts for 2021*: US West \$162.71 US East \$195.53 US Total \$175.02
Total Expenditure	Meet/Exceed DBEDT Forecasts for 2021*: US West \$4.1B US East \$3.06B US Total \$7.16B
Visitor Satisfaction - Met/Exceeded Trip Expectations	Maintain/Improve Score from 2019: US West 97.3% US East 97.2% US Total 97.2%
Resident Sentiment - <i>Tourism has brought more benefits than problems</i> - Strongly/Somewhat Agree	Improve Score from 2019: 58%

A tropical waterfall cascading down a lush green cliffside into a pool of water, with a black sand beach and white sand beach in the foreground.

MAHALO

Agenda Item #3:

Presentation of the Brand Management Plan by
each Global Marketing Team:

Hawaii Tourism Japan (HTJ)
by Eric Takahata



2021 HTJ BMP PRESENTATION

Eric Takahata
Managing Director

MARKET CONDITIONS

MARKET CONDITIONS

Japan's economic overview

2019

- Real GDP increase
-7.1% (Q4)
- Unemployment rate
(average)
2.4% (2019)
- Consumer price index
+0.6
- Consumer confidence
39.1
- Exchange rate
109.0¥
- Household savings
Over 17.5M¥

12.7%
Real GDP
increase

Q4 2020

2.8%

Unemployment
rate (average)

2020

-0.2%
Consumer
price index

2020

29.6
Consumer
confidence

January 2021

105¥
Exchange
rate

February 2021

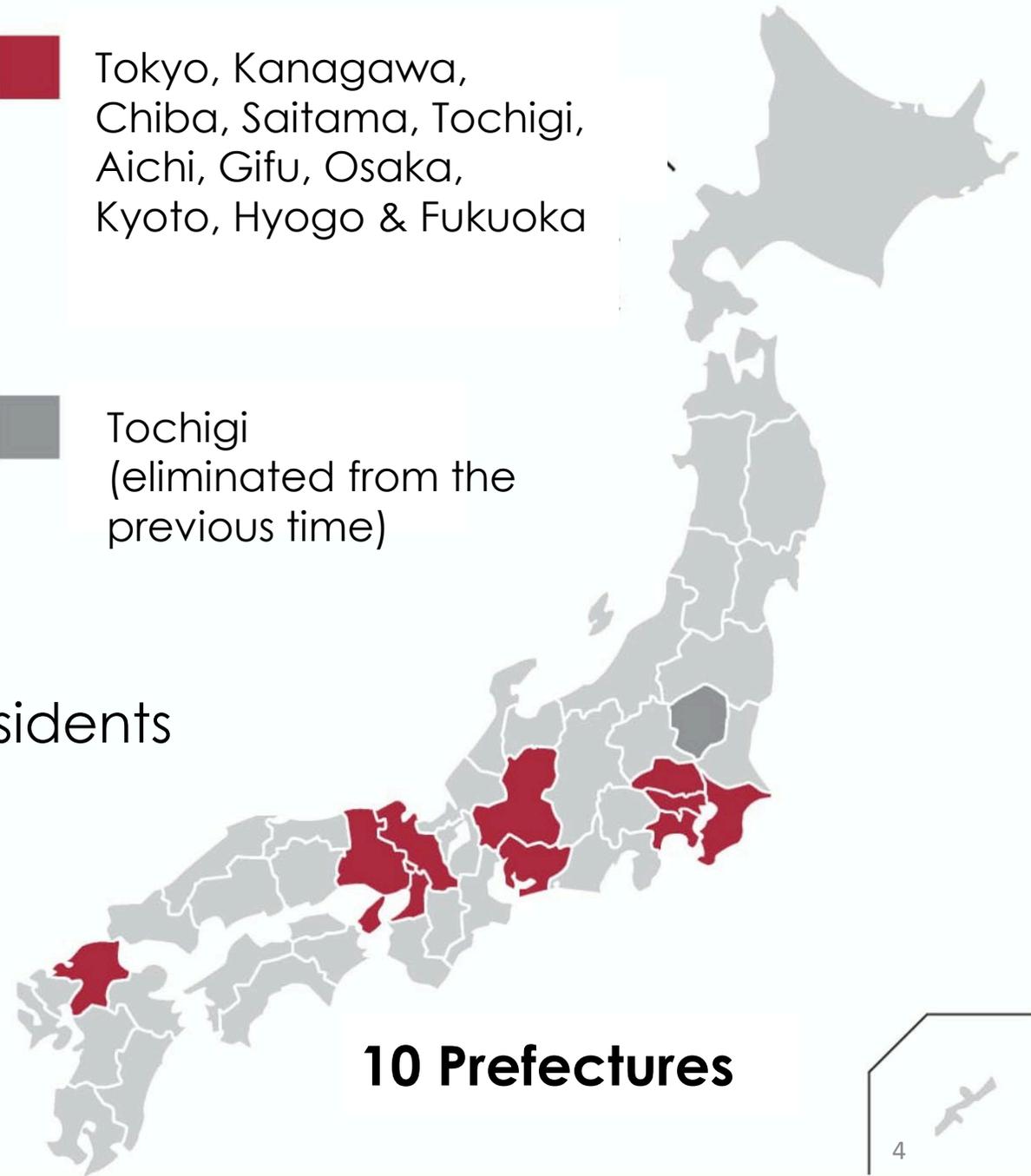
OVER
14.3M¥
Household
savings

MARKET CONDITIONS

- **Extension 2nd Japan State of Emergency Declaration (until 3/7)**
- **Japan entry restrictions**
 - Required PCR test
 - 14 day quarantine for returning residents
- **Vaccination starting Late Feb.**

■ Tokyo, Kanagawa, Chiba, Saitama, Tochigi, Aichi, Gifu, Osaka, Kyoto, Hyogo & Fukuoka

■ Tochigi (eliminated from the previous time)



Japan's Covid-19 Vaccination

314 million vaccines (**157 million** people)

- Pfizer Inc.(144 million)
- Moderna Inc. (50 million)
- AstraZeneca PLC (120 million)

Japan Population: 126.5 million

Mid Feb-
March

Healthcare personnel (approx. 4 million)

End of
Mar-
Early
April

senior citizens aged 65+ (approx. 36 million)

Mid
April

people with **pre-existing conditions** (approx. 8.2 million)
workers at elderly care facilities (approx. 2 million)
People **aged 60-64** (approx. 7.5 million)

June

People **aged 20-64 people** (approx. 8.2 million)

Total 65.9 million Japanese (52.5%) will get COVID vaccine by this June

MARKET CONDITIONS



Fiscal 2020 budget – 3rd Supplemental budget:
The Cabinet approved a **¥21.84 trillion** and additional budget boosts Japan's government total spending to exceed **¥175 trillion**



The **Tokyo Olympic** Games could be held **without any spectators** this summer. The Olympics are scheduled to open on July 23

MARKET CONDITIONS

Japan outbound



2019 : 20,080,669 pax

2021 : 4,417,747 pax (22% vs 2019)

Japanese visitor arrivals

2019: 1,576,205 arrivals

2020 HTJ: 21% (vs 2019) 297,244

2021 HTJ Forecast: 32% (vs 2019) 504,386 expected

11.4% (market share vs JATA forecast)

2021	QTR 1	QTR 2	QTR 3	QTR 4
Forecast vs 2019	2.0% (7,499, pax)	3.0% (10,779 pax)	40.0% (175,807 pax)	77.1% (310,301 pax)

MARKET CONDITIONS

Airline Operation (April ~ June)



2021 April				
Op Airline Code	Flight #	Origin Code	Total Flights	Seats
ANA	NH 186	HND	9	2,214
HA	HA 822	NRT	TBA	TBA
HA	HA 450	KIX	TBA	TBA
HA	HA 864	HND	TBA	TBA
JAL	JL 74	HND	7	1,302
ZG	ZG2	NRT	TBA	TBA
Total			16	3,516

2021 May				
Op Airline Code	Flight #	Origin Code	Total Flights	Seats
ANA	NH 186	HND	9	2,214
HA	HA 822	NRT	TBA	TBA
HA	HA 450	KIX	TBA	TBA
HA	HA 864	HND	TBA	TBA
JAL	JL 74	HND	8	1,488
ZG	ZG2	NRT	TBA	TBA
Total			17	3,702

2021 June				
Op Airline Code	Flight #	Origin Code	Total Flights	Seats
ANA	NH 186	HND	8	1,968
HA	HA 822	NRT	TBA	TBA
HA	HA 450	KIX	TBA	TBA
HA	HA 864	HND	TBA	TBA
JAL	JL 74	HND	TBA	TBA
ZG	ZG2	NRT	TBA	TBA
Total			8	1,968

TRAVEL TRENDS



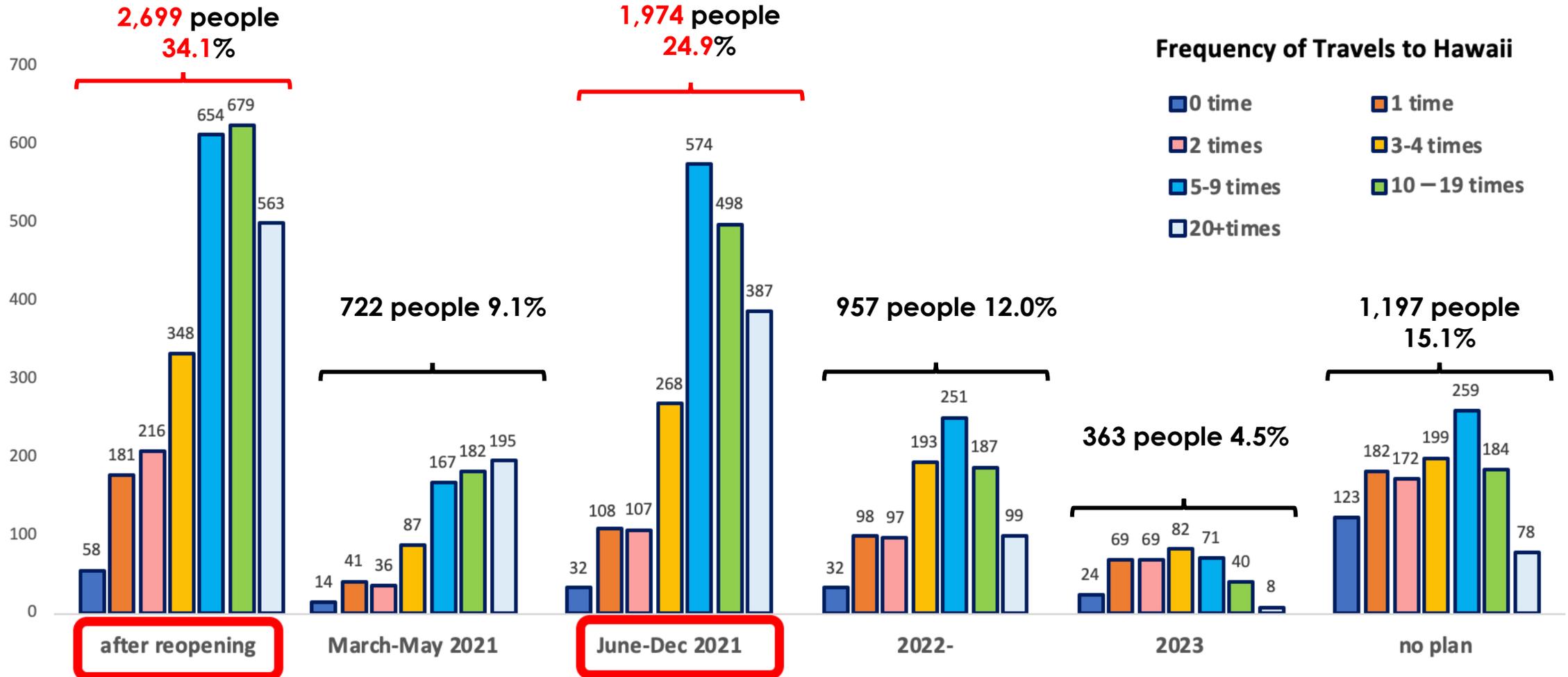
Outbound Travel Situation

- **Level 3 advisories** for outbound travel (including U.S.)
- **JATA and ANTA's suggestion** of “Managed Travel” to restart outbound travels (Presenting to Ministry of Travel)
 - Hawaii is the 1st foreign destination to pilot
 - Successful proof of concept to eliminate 14 day quarantine for returning residents
 - Convince Ministry of Travel to allow packaged tours abroad

Consumer Sentiment (N= 7,912)

Timing: When consumers would like to visit Hawai'i

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



TARGET AUDIENCE

Target audience

- Visit outbound travel once a year at least
- Willing to invest on self-improvement & wellbeing
- Globally conscious contributors
- Higher income over US \$100,000

(Spending potential, desirable attributes, segment size)



Target Audience Personas



Potential Pono Travelers

MAIN ATTRIBUTE

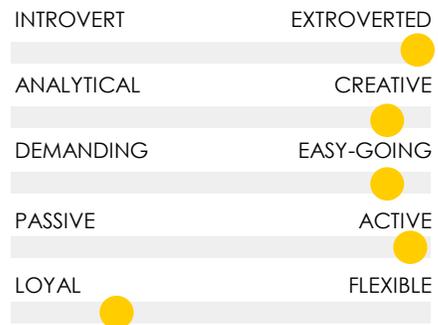
AGE: 20-40s

RESIDENCE: Japan

PROFESSION: Various

RELATIONSHIP: Various

PERSONALITY



Affluent families

MAIN ATTRIBUTE

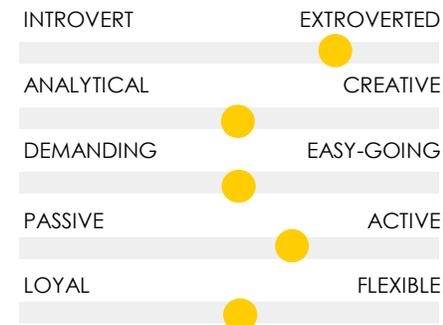
AGE: 30-50s

RESIDENCE: Japan

PROFESSION: Various

RELATIONSHIP: Married and have children

PERSONALITY



New-norm workers

MAIN ATTRIBUTE

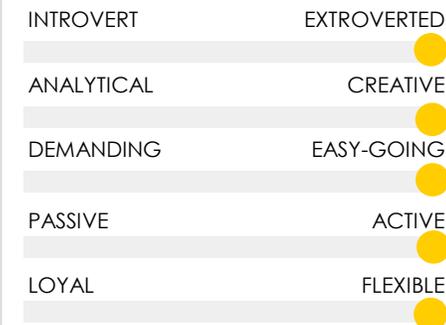
AGE: 20-40s

RESIDENCE: Japan

PROFESSION: Various but mostly able to work remotely

RELATIONSHIP: Various

PERSONALITY



Couples

MAIN ATTRIBUTE

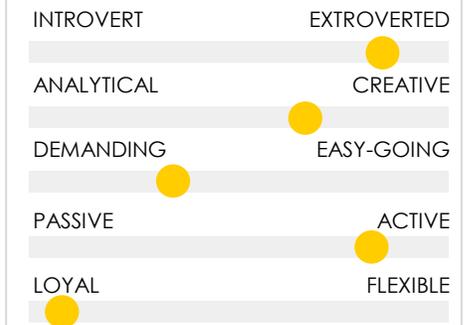
AGE: 20-30s, 40-60s

RESIDENCE: Japan

PROFESSION: Various

RELATIONSHIP: Couple

PERSONALITY





Potential Pono Travelers

Value the culture and nature of Hawai'i

Proactively share their positive experiences in Hawai'i on social media

Most likely to resume travel to Hawai'i regardless of price hikes on travel products and airfare

Hold an ethical mindset with the environment and society while showing interests in SDGs

Aspire to travel to Hawai'i multiple times

Have friends and relatives in Hawai'i

New-norm Workers



Embraced the new norm of working remotely

Spend money on their valuable experience such as hobbies and travels

Value work-life balance

Think travel as self-rewarding trip

Likely to adopt new movements

Travel without schedule restrictions

PRIMARY TARGET REGIONS

Major Market Region

- Kanto area
(Tokyo, Kanagawa, Saitama, Chiba)
- Kansai area
(Osaka, Hyogo, Kyoto, Nara)

Secondary Market Region

- Aichi, Fukuoka, Sapporo



CONSUMER STRATEGY

CONSUMER STRATEGY

Jan – Jun 2021 approach (existing assets)

- Focus on public relation and SNS contents distribution for Jan – Jun of 2021
 - Hawaii New Normal & Safety Protocol
 - New destination experience introduction & stories
 - Responsible Tourism (Malama Hawaii) direction
(i.e. SDGs = Aloha+ Challenge)
- HTJ CRM (database) campaign to target Hawaii fan & Repeaters
- Aloha Program Hawaii specialists enhancement program
(Hawaii culture program, Responsible Tourism – Malama Hawaii and Support Hawaii Program)



CONSUMER STRATEGY

Jul – Dec 2021 approach

- Collaborative initiatives with Airline/Credit card company to target high valued market from their membership data
- Branding campaigns based on Responsible Tourism (Malama Hawaii)
- Media initiatives to reach target audiences
- Digital marketing and advertising initiatives



TRADE STRATEGY



TRADE STRATEGY

Jan – Jun 2021 approach (existing assets)

- Extensive online education
 - Ongoing digital platforms (webinar, etc.)
- Enhancement of travel trade website
 - Increase educational tools
 - Update/maintenance of accurate latest information from Hawaii
 - Updates of industry partner news
- Recovery preparation
 - Stakeholder discussion to formulate recovery initiatives
e.g. trade focused influencer initiatives
- Recovery product development support

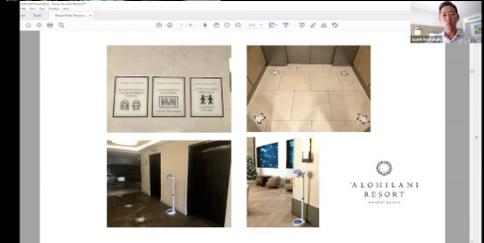


TRADE STRATEGY

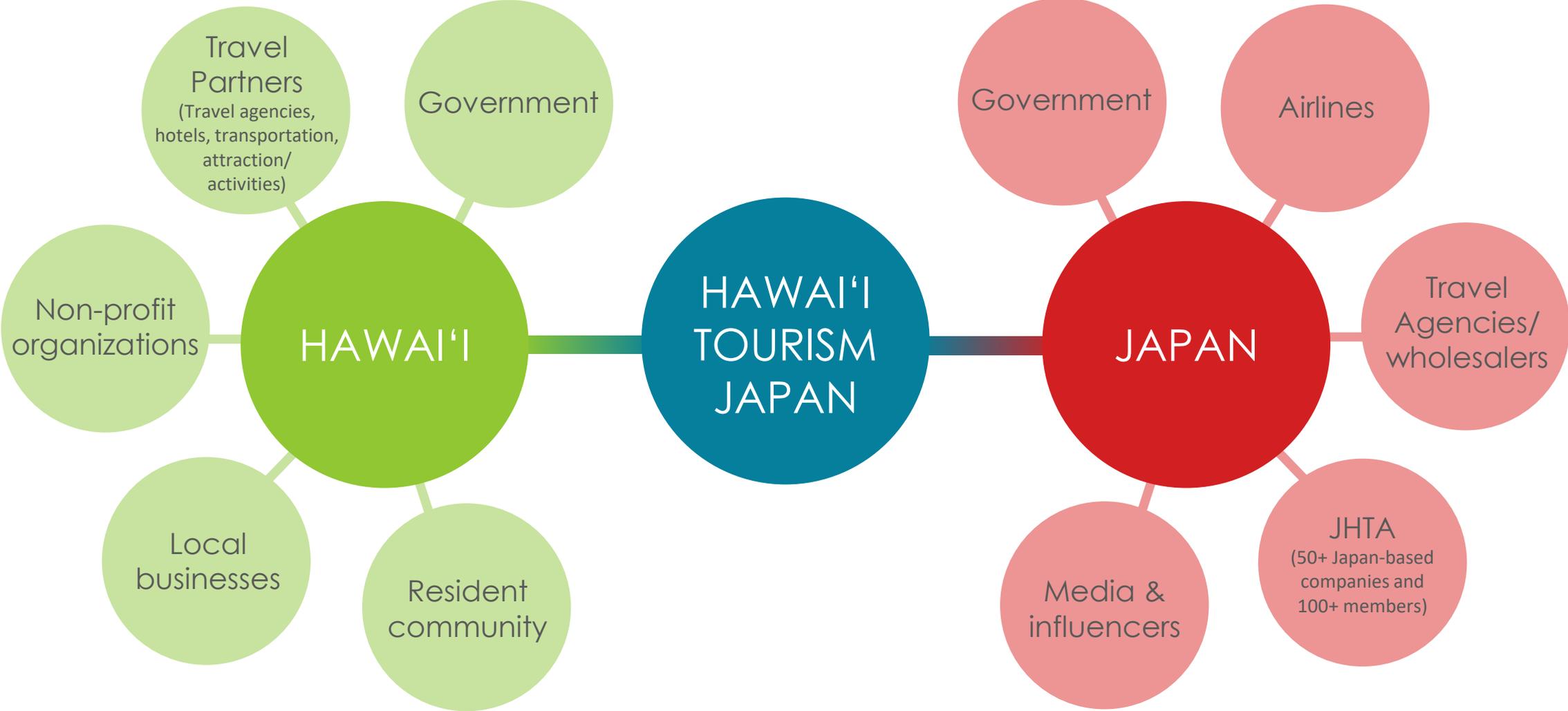
Jul – Dec 2021 approach

- Immediate stakeholder implementation support
 - Co-op program with airlines/wholesalers/OTA
 - Aloha Program Satellite office enhancement nationally
- Continued industry education
 - Industry FAM tours
 - Japan Summit
 - Online education
- Collaborate with travel trade media to message Hawaii's destination strategy





Industry collaboration



BMP TIMELINE



2021 Industry Activity

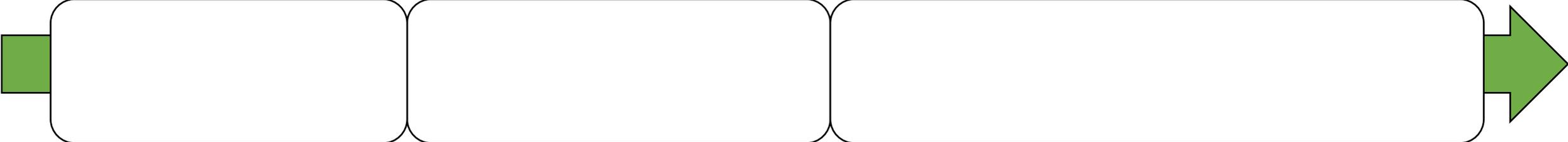
Q1
(Jan – Mar)

Q2
(Apr – Jun)

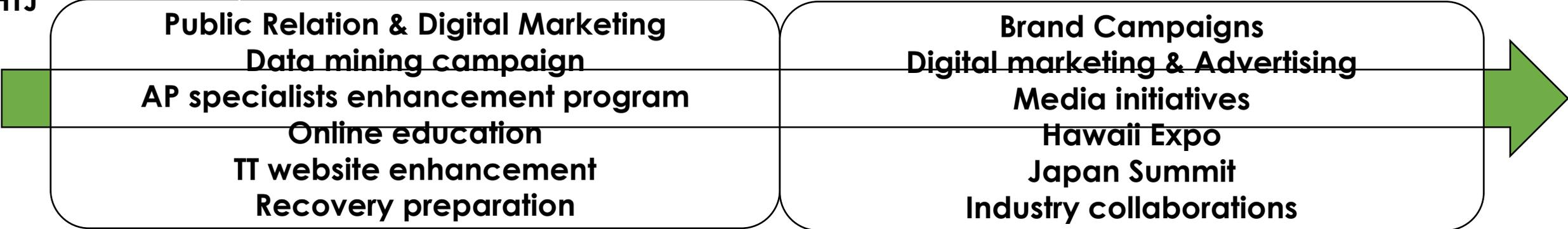
Q3
(Jul – Sept)

Q4
(Oct – Dec)

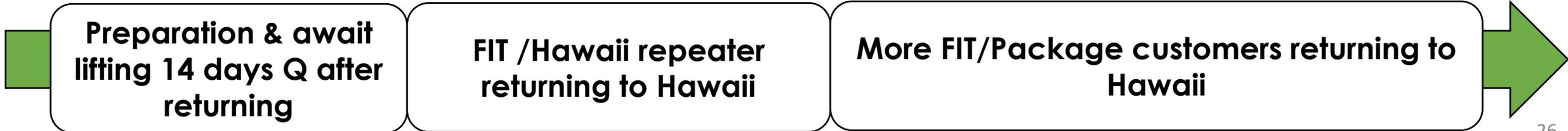
Airlines /Travel Agencies/ OTA



HTJ



Consumer Sentiment



2021 HTJ Activity

Q1

(Jan – Mar)

Q2

(Apr – Jun)

Q3

(Jul – Sept)

Q4

(Oct – Dec)

COVID19 updates

- State Office Communications
- Creatives
- Media relation
- Stakeholder relation

Public Relation & Digital Marketing

- Virtual tour initiatives
- SNS promotions

Recovery Preparation

- Malama Hawaii & Responsible Tourism
- Support Hawaii
- Industry Collaborations

Direct Consumer

- Branding Campaign
- Digital Marketing
- Malama Hawaii initiatives
- Surfing initiatives
- Hawaii Expo (virtual)

Travel Trade

- Japan Summit
- Online learning
- IT website enhancement

Communications

- Stakeholder relations
- Media Communications

Initiatives

And more

Industry Recovery Promotion



YouTube



Airline Co-op



Wholesalers Co-op



+

Education



HTA 4 Pillars

A vertical photograph of a rugged, green mountain range with a body of water in the foreground.A circular gold icon featuring a bird perched on a branch.

**NATURAL
RESOURCES
PILLAR**

*Respect for Our Natural
& Cultural Resources*

A vertical photograph of a shirtless man wearing a traditional straw hat, walking through a lush tropical garden.A circular gold icon featuring a silhouette of a person in a traditional pose.

**HAWAIIAN
CULTURE
PILLAR**

*Support Native Hawaiian
Culture & Community*

A vertical photograph of a large crowd of people walking along a path lined with trees and tents.A circular gold icon featuring silhouettes of people walking under a palm tree.

**COMMUNITY
PILLAR**

*Ensure Tourism & Communities
Enrich Each Other*

A vertical photograph of a winding road along a coastline with a large mountain in the background.A circular gold icon featuring a palm tree and waves.

**BRAND
MARKETING
PILLAR**

*Strengthen Tourism's
Contributions*

Branding (Consumer)

- Incorporate key components of responsible tourism (Malama Hawaii) to reach HTJ target audience working with industry partners such as hotels & attractions
- Capitalize on SDG movement in Japan
- Create unique messaging for each island – “Island Stories – The New Hawai‘i”

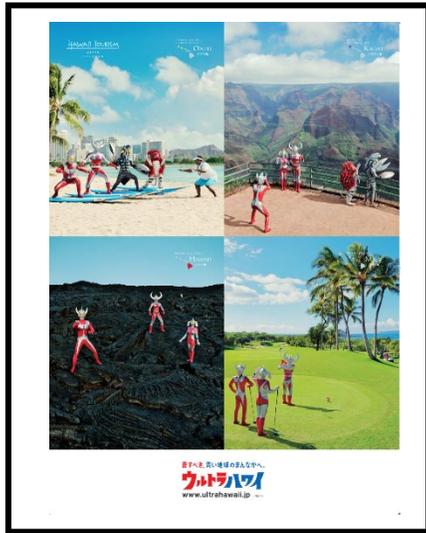
Mālama Hawai‘i Campaign

- Project 1: New Campaign
- Project 2: Hokulea Project
- Project 3: Aloha Program



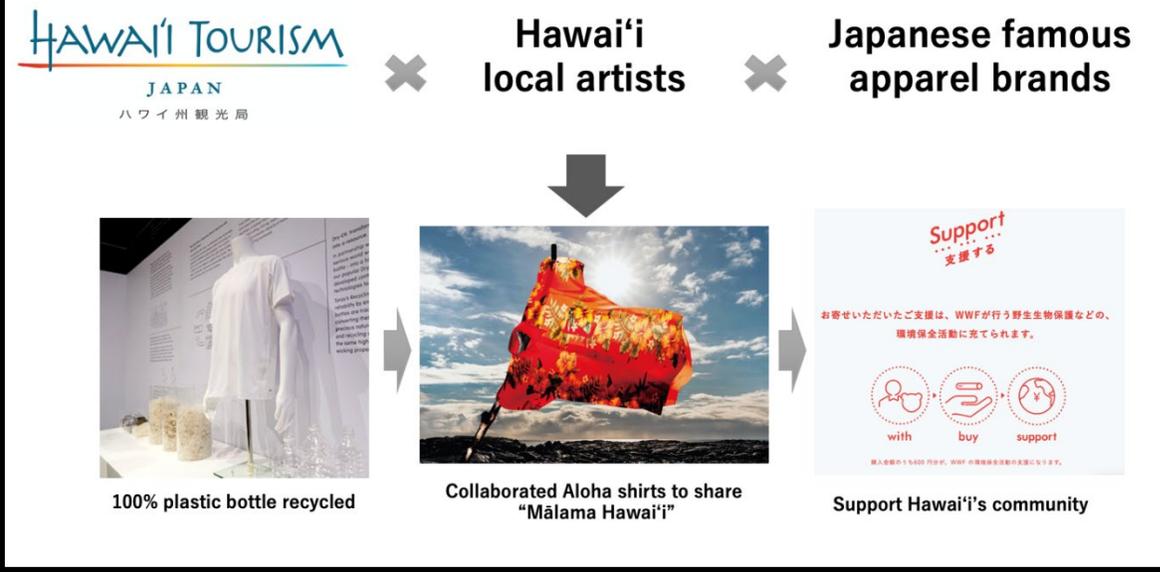
Mālama Hawai'i - Project 1

HTJ past campaigns



2021

NEW campaign announced soon!!



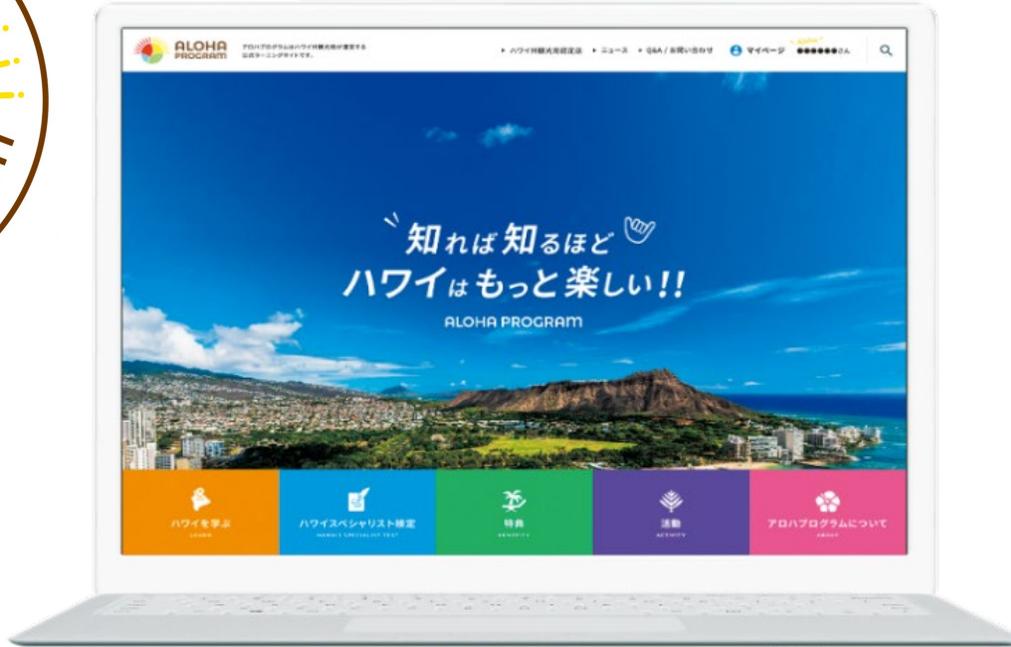
Mālama Hawai'i - Project 2

Hōkūle'a Microsite Development



10 city Movie Blitz





Mālama Hawai'i - Project 3



As of 1/31	Total
Advanced	12,477

HTJ Online Platform



<https://www.gohawaii.jp>



<https://www.allhawaii.jp>

Microsite Development

allhawaii | ホテル、レストラン、観光名所を探す

ホーム | カテゴリで見る | ハワイの島 | 公式ニュース | スペシャル | イベント | コラム | 動画 | ミュージック | 基本情報 | 業界関係

ハワイ州 レスポンシブルツーリズム 情報サイト

Mālama Hawai'i | an initiative from allhawaii

マラマハワイとは | 旅行者にできること | 取組み紹介 | 関連映像 | コミュニティ | 特集 | 業界関係の方へ

Re-Imagine Hawai'i

マラマは思いやりの心、
ハワイを思いながら
旅をしよう。

LET'S SCROLL

関連動画

Share the Aloha - マウイ島 - ハワイの価値観

ハワイの自然を楽しむ前に知ってほしいこと by ハワイ州観光局

Share the Aloha - カウアイ島 - フラ by ハワイ州観光局

ハワイ初電気バスを導入

ANA オリジナル、静かで環境負荷も少ない電氣トローリーバス「ANAエクスプレスバス」

JAL | IHS

JALパイロットによる「JALそらエコ道案内」

ハワイの島に配置したオーシャンフロントホテル

allhawaii | ホテル、レストラン、観光名所を探す

ホーム | カテゴリで見る | ハワイの島 | 公式ニュース | スペシャル | イベント | コラム | 動画 | ミュージック | 基本情報 | 業界関係

Surfing in Hawai'i

現代へと受け継がれるハワイのサーフカルチャー

History | Surfers | Enjoy | Lifestyle | Movies

History: サーフィンの歴史

Surfers: サーファー紹介

Enjoy: サーフィンを楽しむ

Lifestyle: ライフスタイル

Movies: 映像を見る

Share the Aloha - オアノノ島 海の環境

OCEAN RAMSEY | MARINE CONSERVATIONIST AND SURFER

この保護活動は、皆さんが、協力することができます

History

ハワイにおけるサーフィンの起源

ハワイやオアノノ島には、「古代ポリネシア航海家」の入港は、西暦10世紀後半から12世紀前半頃には行われていたと推定されています。そのうち「サーフィング」というスポーツの起源とされています。

History

Introduction

ハワイにおけるサーフィンの起源

木製リーボードの誕生

ジュームスクック船長とサーフィンの結露

近代サーフィンの展開

近代サーフィン

日本のサーフィンの歴史

年表・サーフボードの歴史

Hawai 'i Expo Virtual Event



ON AIR 10:00~10:45	TIME SCHEDULE タイムスケジュール
HAWAII TALK SHOW	10:00-10:45 セルソングブース
	11:00-11:45 アパレルブース
	12:00-12:45 フューチャリズムブース
	13:00-13:45 アラモアナホテルブース
	14:00-14:45 ハレクラネブース
	15:00-15:45 ハイアットブース
	16:00-16:45 マリノットブース

BOOTH CHANNEL	CONTENT CHANNEL
<ul style="list-style-type: none"> HOTEL ホテルブース AIR 航空ブース WEDDING ウェディングブース SEMINAR セミナーブース 	<ul style="list-style-type: none"> ACTIVITY アクティビティブース CAR レンタカーブース HJT HJTブース



Partner Booth Image

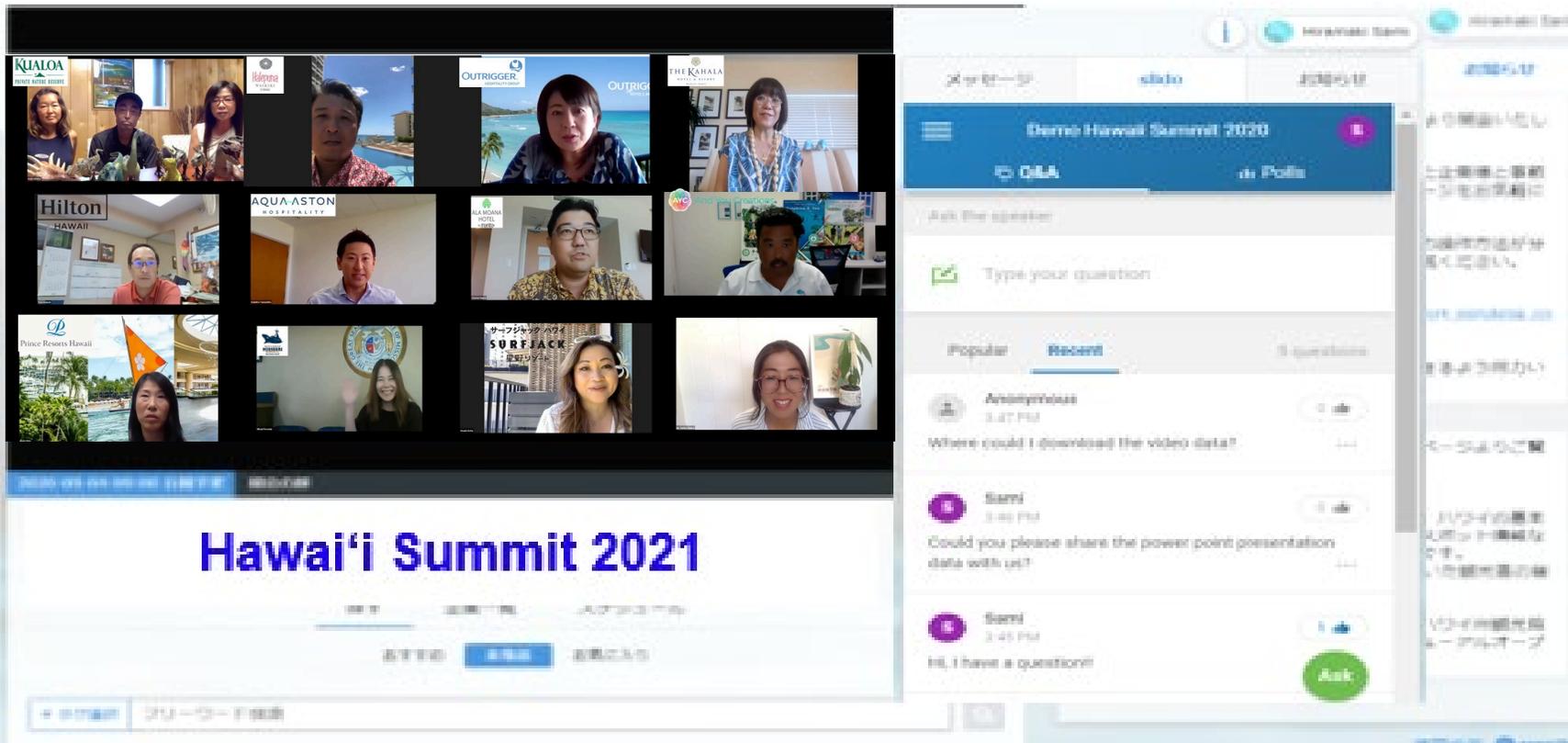


Stage area Image

- Entertainment Stage
- Partner Booth (about 100)
- Seminar & Workshop
- E-Commerce area

Japan Summit & Monthly Education Forum

Partners Collaborative Efforts



2021年2月-4月の第3水曜日に開催
ハワイ・ツーリズム・フォーラム
QRコード 旅行業界・旅行業界を目指す学生を対象にフォーラム参加者募集中

**フォーラムに参加して
コロナ禍にハワイの情報をキャッチ**

2021年2月「新型コロナウイルスとハワイ州」、3月「SDGsとハワイ州」、4月「教育とハワイ州」をテーマに「ハワイ・ツーリズム・フォーラム」を開催します。各テーマの専門家、ハワイ関連パートナーが登場し、取り組み、事例を紹介します。今後の旅行商品開発やニューノーマルのハワイ旅行に備えませんか？

3/17(水)	4/21(水)	5/19(水)
9:00-12:00 新型コロナウイルスとハワイ州	9:00-12:00 SDGsとハワイ州	9:00-12:00 教育とハワイ州

お問い合わせ：
ハワイ州観光局 セールsteam
sales@htjapan.jp

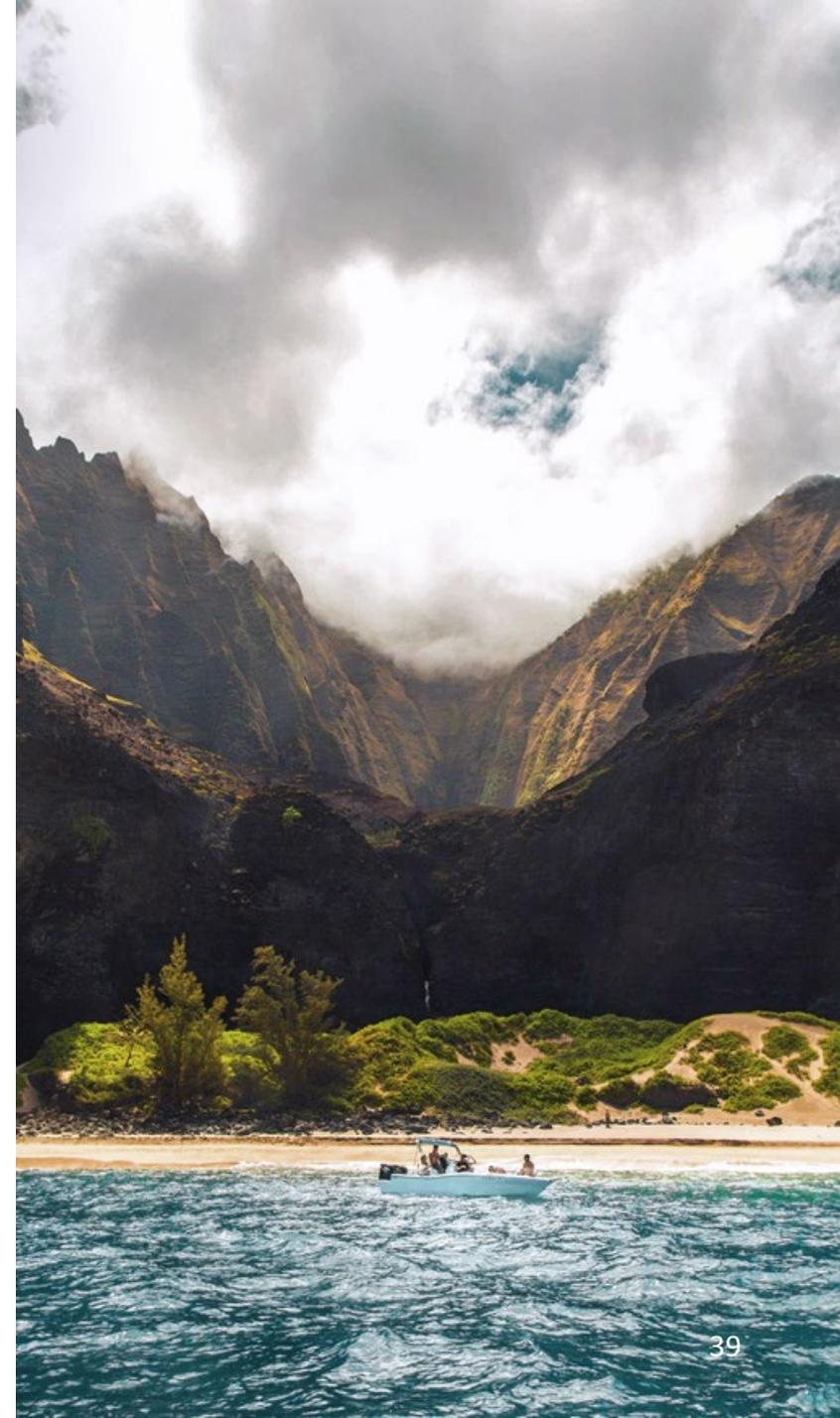
HAWAII TOURISM
JAPAN
OFFICE

MCI

HAWAII TOURISM
JAPAN

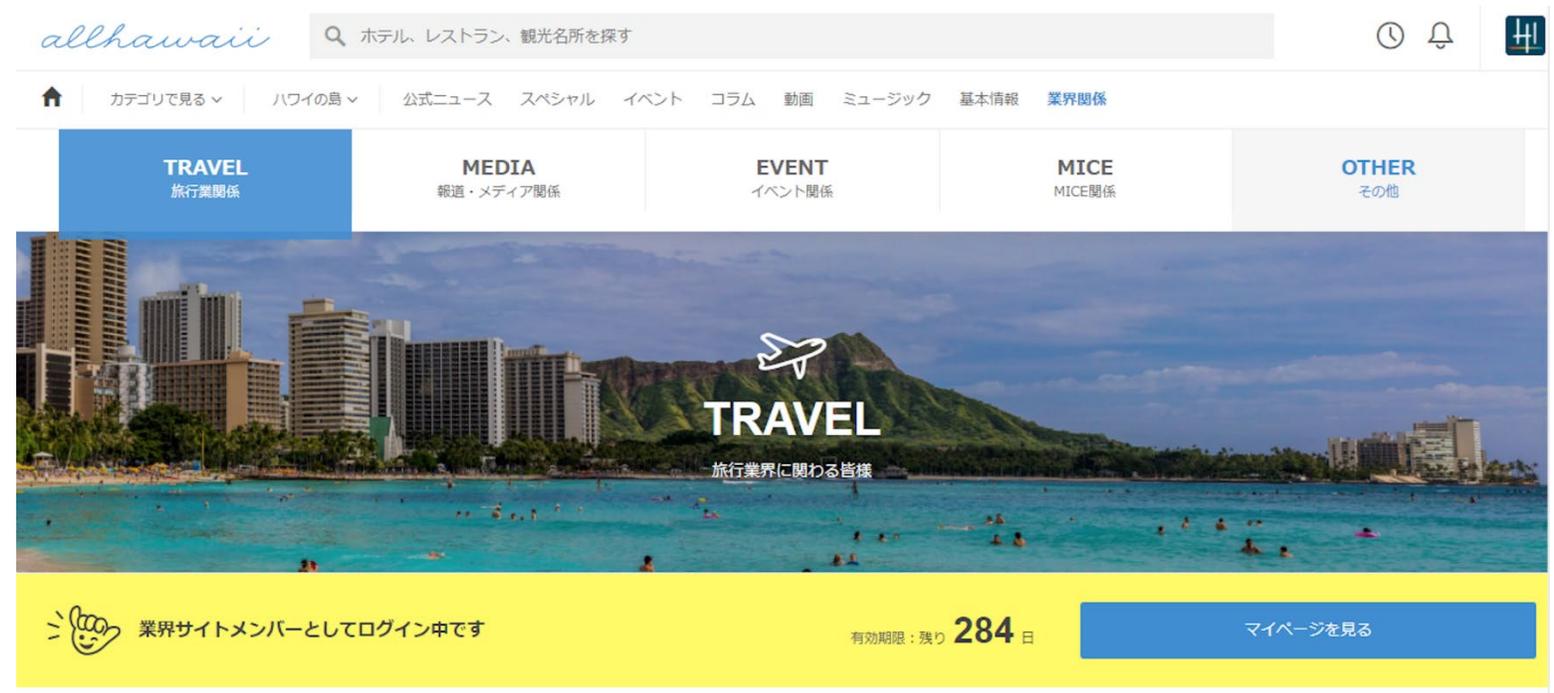
MCI

- Promote “Hawaii as learning destination” through Public Relation effort (especially Jan – Jun 2021)
- Target 3 core segments – incentive, edu-tourism and entertainment
 - Incentive – MLM, construction, telecommunication, retail
 - Edu-tourism – small-scale, high-spending schools in 5 cities
 - Entertainment – HIS, JTB and KNT's entertainment division
- Short-term, small group bookings
 - e.g. 50 – 100 pax , 100 - 200 room nights
 - 2022 onward
- Educate wholesalers MCI/Group via online and other methods



Travel Trade Education Resources

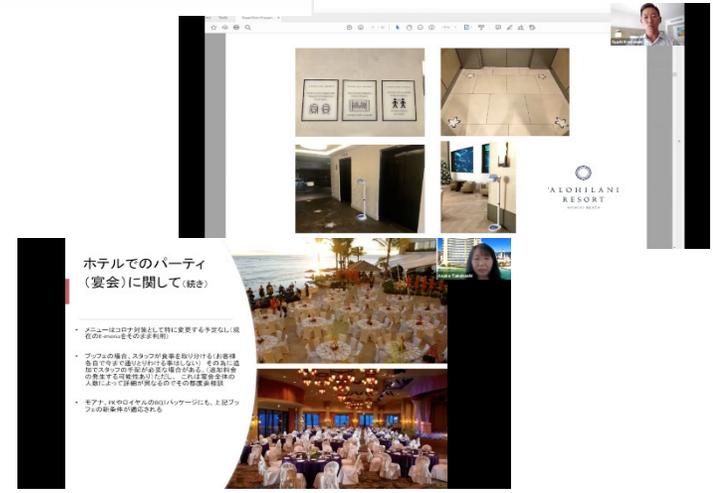
HTJ Travel Trade site



Educational materials & data



Venue list & finder



Webinar

RESPONSIBLE TOURISM

RESPONSIBLE TOURISM

- Malama Hawaii initiatives (Branding)
 - Project 1: New Campaign
 - Project 2: Hokulea Project
 - Project 3: Aloha Program
- Educational Resource Development (in Japanese)
- SDGs/Aloha+ Challenge PR initiatives
- MCI: Edu-Tourism related activities



Mālama Hawai'i

— MĀLAMA — HAWAII'I

allhawaii.jp | ホテル、レストラン、観光名所を探す

カテゴリで見る | ハワイの島 | 公式ニュース | スペシャル | イベント | コラム | 動画 | ミュージック | 基本情報 | 業界関係

コラムの一覧へ | 泊まる 92 | 遊ぶ・体験する 1009 | 食べる 822 | 買い物 347 | ウエディング 136 | more

ハワイ州観光局ニュース | プロモーション

ハワイ州観光局、文化継承と海洋保全活動を支える「Support Hawai'i」を1月から開始
2020.12.30

ハワイ州観光局のウェブサイトには、ハワイの美しい風景、歴史的建造物、そして「Support Hawai'i」の活動に関する情報が掲載されています。

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~

リモートハワイ旅 Support Hawai'i
2021.1.9 (Sat.)

ナビゲーター
内野加奈子氏
ファネリアス多美子氏

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~

リモートハワイ旅 Support Hawai'i
2021.1.23 (Sat.)



Mālama

環境に配慮して作られたハワイ伝統工芸「カバ」風マスク「マラマ」

目的：文化を継承する局向や模様をモチーフに、「お互いを思いやり協力していこう」という意識が込められたデザイン

ALPHA

Mālama
思いやりの心で、マスク着用を。

マラマとは、ハワイ語で「大切にすること」の意味。ハワイは旅行者とハワイに住む人々にとって、共に大切な場所です。人と人、人と自然の調和を大切に、互いを思いやる心でハワイの文化に触れながら旅行をぜひお楽しみください。ハワイ州では、安心してハワイを体験していただくために様々な場所で、新型コロナウイルス感染症の安全・衛生対策に取り組んでいます。マラマの心で、ハワイ滞在中のマスク着用をお願いします。

Mālama HAWAII | Mālama HONUA | Mālama MANDATE

ハワイの文化を大切に | ハワイの海を大切に | ハワイの環境を大切に

HAWAII TOURISM JAPAN | www.allhawaii.jp

Mālama Hawai'i

Workshop

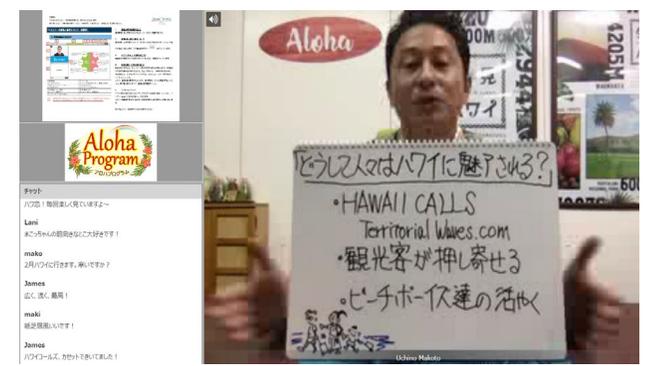


Field Trip

~Aloha Program Week in Hawaii~



Webinar



BMP BUDGET

BMP BUDGET

	Q1	Q2	Q3	Q4	Annual
Advertising	117,966	117,966	810,466	335,466	1,381,864
PR & Promotions	18,900	18,900	219,800	339,800	597,400
Trade Marketing	38,898	38,898	511,938	290,898	880,632
Research	0	0	0	0	0
Hawaiian Culture Integration	35,898	35,898	169,398	138,910	380,104
Admin Costs	314,950	315,000	315,000	315,050	1,260,000
Total	526,612	526,662	2,026,602	1,420,124	4,500,000

BMP PERFORMANCE MEASURES

BMP PERFORMANCE MEASURES

Advertising

	Annual Target	Targets	
	2021	Jan-Jun	Jul-Dec
LEISURE MEASURES			
Consumer Ad Measures			
<i>TV Reach</i>	NA	NA	NA
<i>Print Reach</i>	16,350,250	5,605,250	10,745,000
<i>Digital Reach</i>	214,497,272	-	214,497,272
<i>Radio Reach</i>	3,826,100	1,832,300	1,993,800
<i>TV Gross Impressions</i>	NA	NA	NA
<i>Print - Total Audited Circulation</i>	4,671,500	1,601,500	3,070,000
<i>Digital Gross Impressions - Total Audience</i>	104,363,816	-	104,363,816
<i>Radio Gross Impressions</i>	9,450,467	4,525,781	4,924,686
<i>Out of Home Gross Impressions</i>	6,736,800	-	6,736,800
Travel Trade Ad Measures			
<i>Print - Total Audited Circulation</i>	8,900	NA	8,900
<i>Digital Gross Impressions - Total Audience</i>	31,150	NA	31,150
Consumer Shows			
<i>No. of Shows</i>	4	2	2
<i>Show Attendance</i>	95,000	40,000	55,000

BMP PERFORMANCE MEASURES

PR

	Annual Target	Targets	
	2021	Jan-Jun	Jul-Dec
Consumer Shows			
<i>No. of Shows</i>	4	2	2
<i>Show Attendance</i>	95,000	40,000	55,000
Public Relations Measures			
<i>No. of Media/PR Calls</i>	190	95	95
<i>No. of Press Releases Issued</i>	24	12	12
...Publicity Value			
<i>Print</i>	1,330,000	\$330,000	\$1,000,000
<i>Online</i>	3,699,600	\$1,599,600	\$2,100,000
<i>Broadcast</i>	10,180,000	\$3,200,000	\$6,980,000
...Number of Impressions			
<i>Print</i>	3,090,000	1,050,000	2,040,000
<i>Online</i>	18,350,000,000	6,600,000,000	11,750,000,000
<i>Broadcast</i>	274,000,000	74,000,000	200,000,000
...Media FAMs/Press Trips			
<i>No. of Group Media FAMs</i>	NA	NA	NA
<i>No of Articles Generated</i>	NA	NA	NA
<i>No. of Individual Press Trips</i>	5	NA	5
<i>No of Articles Generated</i>	10	NA	10

BMP PERFORMANCE MEASURES

Travel Trade & Industry Collaboration

	Annual Target	Targets	
	2021	Jan-Jun	Jul-Dec
Leisure Travel Trade			
...Trade Shows			
<i>No. of Trade Shows</i>	2	0	2
<i>No. of Appointments</i>	340	0	340
...Travel Trade FAMs			
<i>No. of Travel Trade FAMs</i>	2	0	2
<i>No. of Participants</i>	30	0	30
...Trade Education			
<i>No. of Trade Education Sessions</i>	16	8	8
<i>No. of Participants</i>	2,550	1,200	1,350
<i>No. of Agents Completed Online Training Program</i>	3,300	1,500	1,800
Industry Collaboration			
<i>No. of Meetings with Hawai'i Industry Partners</i>	255	125	130
<i>No. of Hawai'i Industry Partners Met With</i>	405	196	209

BMP PERFORMANCE MEASURES

Social Media

	Annual Target	Targets	
	2021	Jan-Jun	Jul-Dec
Social Media Metrics			
FACEBOOK			
<i>Total Impressions Gained</i>	5,790,000	1,710,000	4,080,000
<i>Total Interactions Gained</i>	570,000	210,000	360,000
<i>Total Fan Count</i>	121,300	120,750	121,300
<i>Increase in Fans</i>	900	300	600
<i>Total Posts</i>	127	55	72
INSTAGRAM			
<i>Total Impressions Gained</i>	3,556,536	1,036,536	2,520,000
<i>Total Interactions Gained</i>	265,440	97,440	168,000
<i>Total Fan Count</i>	148,200	141,200	148,200
<i>Increase in Fans</i>	12,800	5,600	7,200
<i>Total Posts</i>	215	95	120

BMP PERFORMANCE MEASURES

MCI

	Annual Target	Targets	
	2021	Jan-Jun	Jul-Dec
MCI MEASURES			
MCI Trade			
<i>... Trade Shows</i>			
<i>No. of Trade Shows</i>	4	0	4
<i>No. of Appointments</i>	150	0	150
...MCI FAMs			
<i>No. of MCI FAMs</i>	2	NA	2
<i>No. of Participants</i>	30	NA	30
...MCI Education			
<i>No. of MCI Education Sessions</i>	17	8	9
<i>No. of Participants</i>	2,720	1,370	1,350
<i>No. of MCI Sales Calls</i>	220	60	160
MCI Room Nights			
<i>Total Citywide MCI Tentative Room Nights</i>	2,000	NA	2,000
<i>Total Citywide MCI Definite Room Nights</i>	2,000	NA	2,000
<i>Total Citywide MCI New to Hawai'i - Definite Room Nights</i>	2,000	NA	2,000
<i>Total Single Property MCI Tentative Room Nights</i>	16,800	5,250	11,550
<i>Total Single Property MCI Definite Room Nights</i>	14,000	5,000	9,000
<i>Total Single Property MCI New to Hawai'i - Definite Room Nights</i>	9,600	3,500	6,100

HTA KEY PERFORMANCE INDICATORS

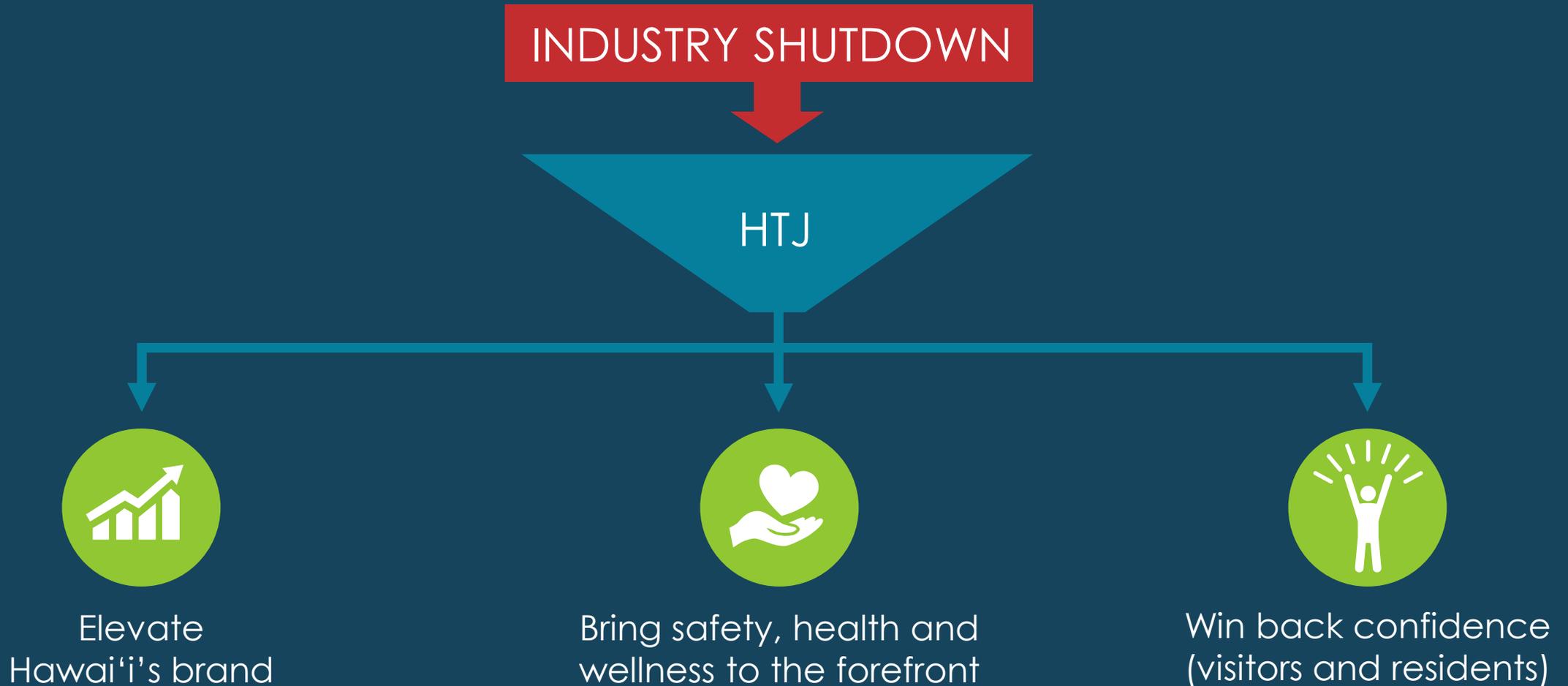
HTA KEY PERFORMANCE INDICATORS

	Target
PPPD\$ (Japan)	Meet/exceed DBEDT Forecast for 2021: \$225.68
Total Expenditure (Japan)	Meet/exceed DBEDT Forecast for 2021: \$1.16 Billion
Visitor Satisfaction - Met/Exceeded Trip Expectation	Improve Score from 2019: Met: 54.3% Exceeded: 43.9%
Resident Sentiment - Tourism has brought more benefits than problems - strongly/somewhat agree	Improve Score from 2019: 58%



Top Takeaways

#1 Turn industry shutdown into an opportunity

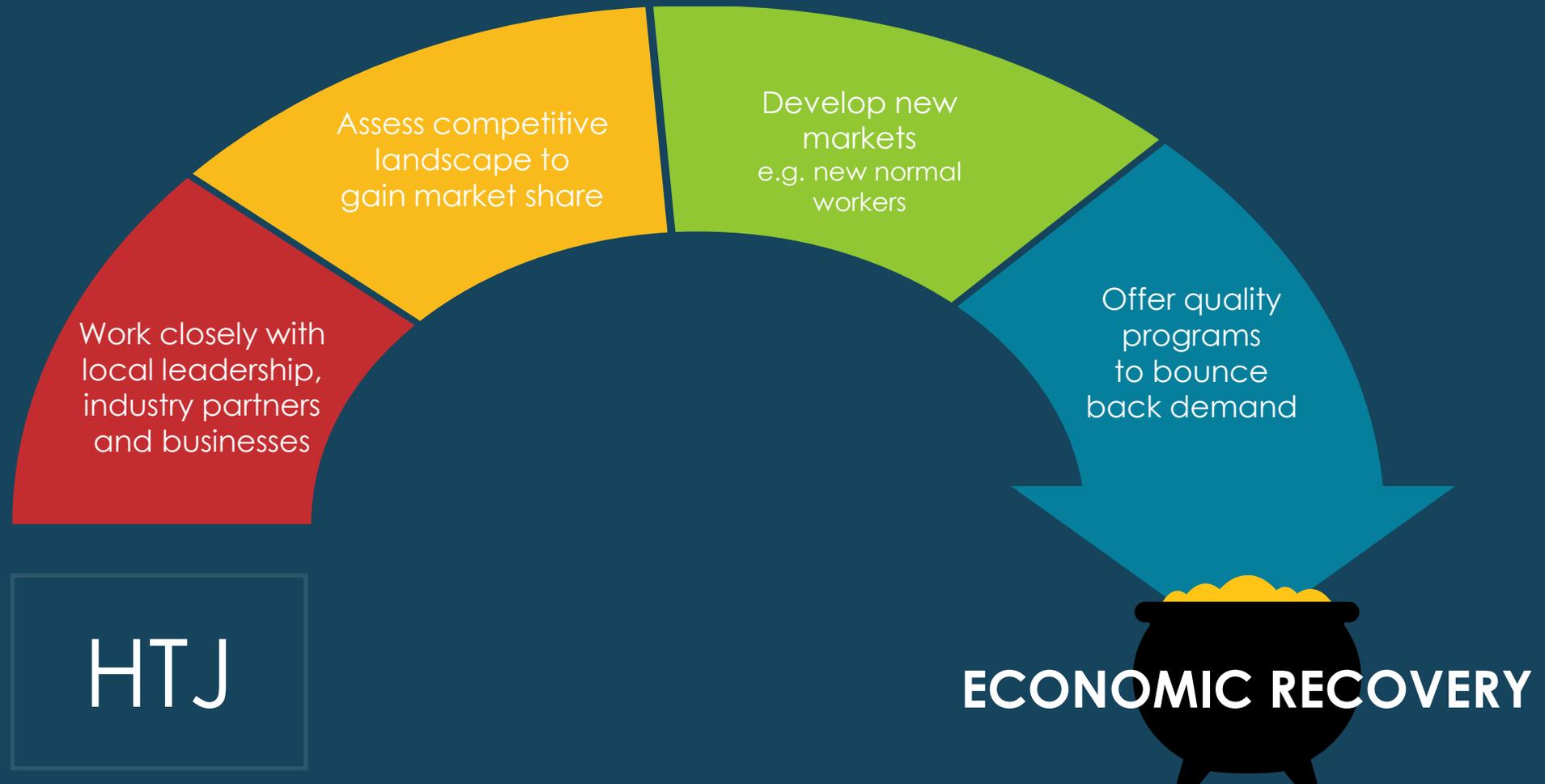


#2 Focus on our most valuable visitors – pono travelers



Cultivate high-value, mindful, responsible travelers

#3 Collaborate to drive a path to economic recovery



A vibrant rainbow arches across the sky, connecting the lush green mountains to the turquoise ocean. The scene is a tropical coastline with a sandy beach and white waves. The word "Mahalo" is written in white text across the center of the image.

Mahalo

HAWAII TOURISM
JAPAN

Agenda Item #3:

Presentation of the Brand Management Plan by
each Global Marketing Team:

Hawaii Tourism Canada (HTCAN)
by Susan Webb



2021 BMP PRESENTATION

Susan Webb
HT Canada

MARKET CONDITIONS

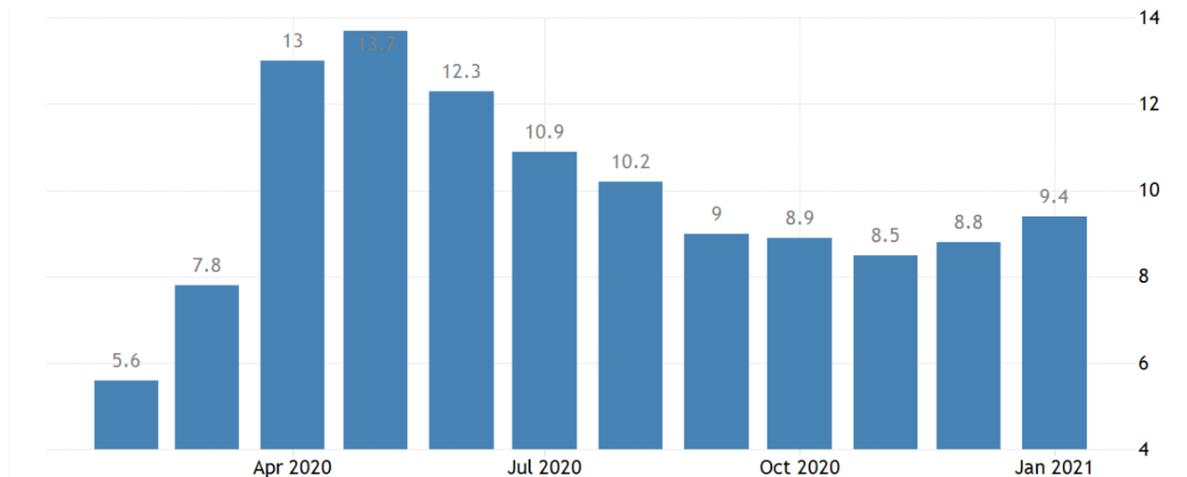


ECONOMIC OVERVIEW

- Canadian federal government's fiscal response + C\$400 billion or 18.5% of GDP
- Wage subsidy program extended to September 2021
- Canadian Dollar lost value in 2020 \$0.732 USD in 2020 (-2.3%) **but improving \$0.78USD**

- Consumer confidence increased to 79.7, roughly 2/3 of the pre-pandemic level (120.6)
- The Bank of Canada's interest rate 0.25%

Economic Indicators	2020p	2021f	2022f	2023f
Real GDP, market prices (2012 \$) (% change)	-5.3%	5.3%	3.5%	1.3%
Personal Disposable Income (2012 \$) (% change)	8.0%	-2.6%	1.0%	1.8%
Household Spending (2012 \$) (% change)	-6.4%	4.6%	5.2%	2.5%
CAD/USD	\$1.34	\$1.30	\$1.28	\$1.26

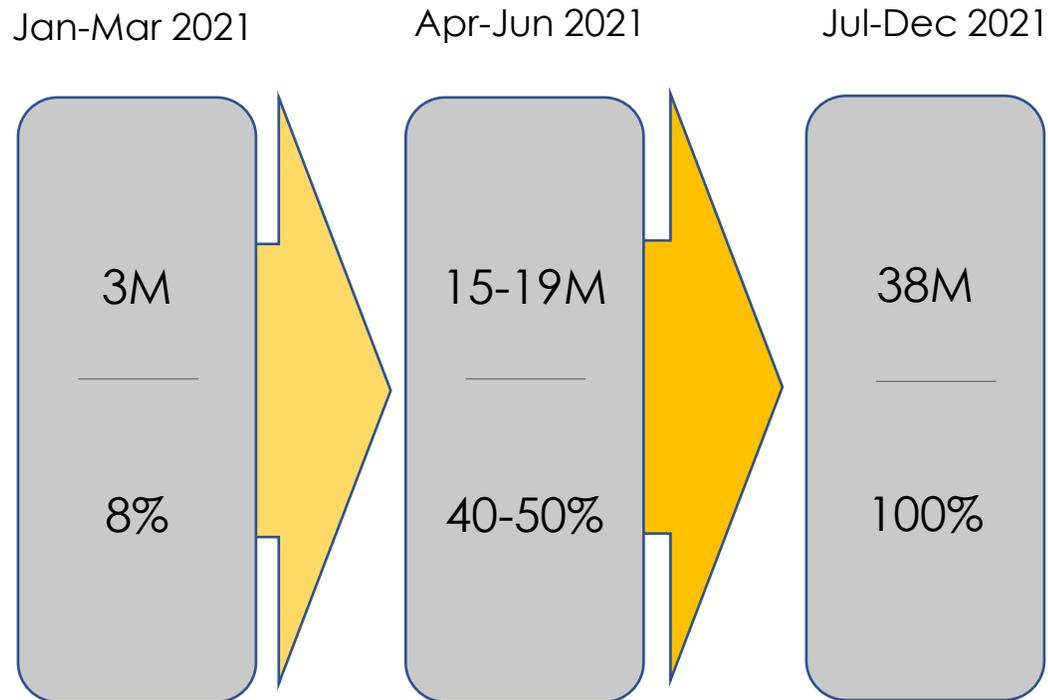


SOURCE: TRADINGECONOMICS.COM | STATISTICS CANADA

Source: Conference Board of Canada economic Forecast 2021

KEY TRENDS

Canada's COVID-19 Immunization Timeline



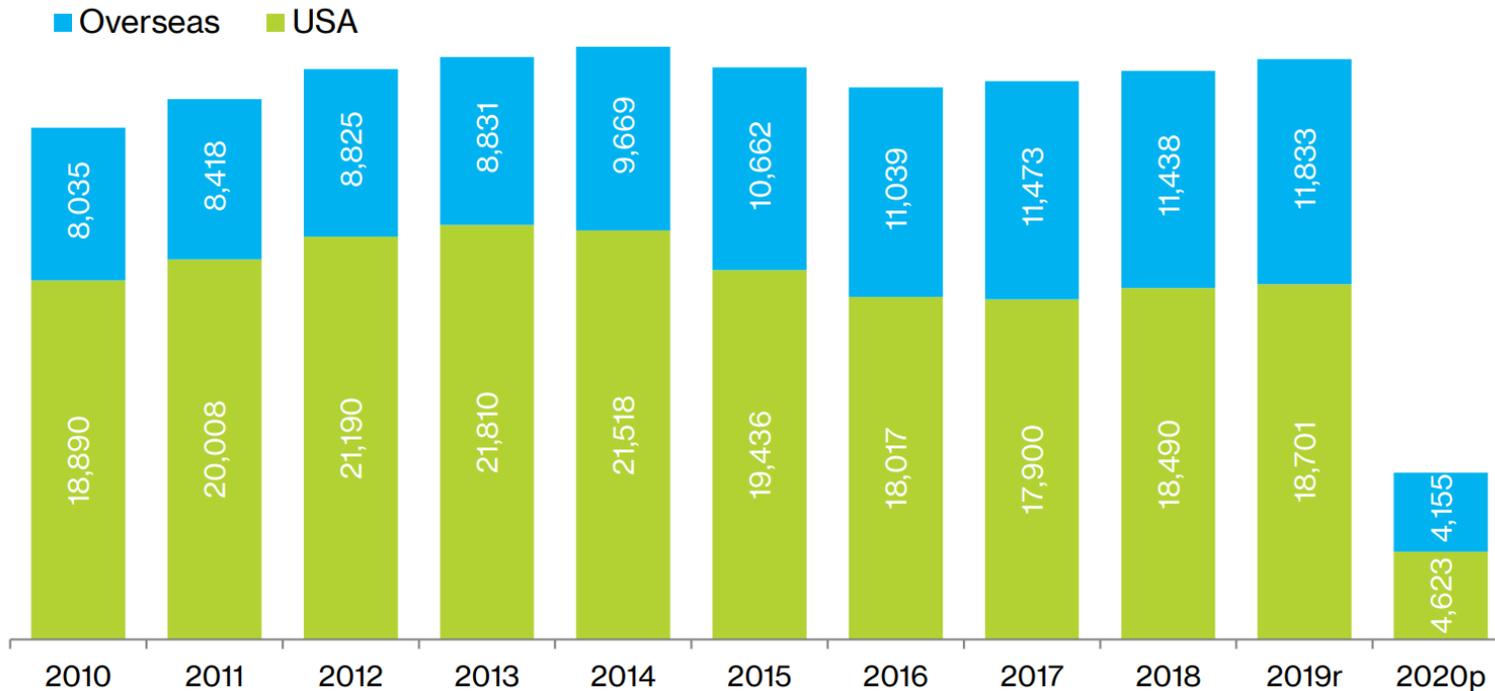
Information is based on regulatory approval and anticipated delivery schedules of vaccine supply
Source: Health Canada

- 1,160,865 doses of COVID-19 vaccines (Moderna & Pfizer-BioNTech) currently
- September 2021 target (100%)
- 35,000 active cases currently*
- President Biden and PM Trudeau relationship off to positive start
- Stricter border and travel measures announced (hotel quarantine upon arrival in Canada)

*Feb. 17, 2021

OUTBOUND TRAVEL

Overnight Travel¹ (000s of trips)
(Jan-Nov), each year



- -94% vs 2019 outbound
- -75% U.S. destinations
- 2020 - 127k trips to Hawai'i (-64%)

AIR SEAT SYNOPSIS

Hawai'i Specific

Outbound Capacity Reductions by Canadian Carriers, Winter 2020-21

Region	% change Nov-Dec	% change Jan-Feb	% change Mar-Apr ¹
USA	-90%	-93%	-66%
Europe & UK	-75%	-77%	-32%
Asia-Pacific	-82%	-82%	19%
Caribbean & Mexico	-86%	-94%	-100.0%
TOTAL	-86%	-91%	-63%

Source: OAG (as of Jan 29). Reflects flights operated by AC, PD, TS, WG, WO, WS only.

NOTE: the smaller rate of change for March and April 2021 is due to the grounding of flights following the pandemic announcement in Mar 2020. The actual monthly reductions are similar in absolute volume to Nov-Dec and Jan-Feb.

WestJet has 52,643 seats into Hawai'i in Q1 2021

Number of Direct Seats by City			
Jan-Dec, 2019	Air Canada	WestJet	Total
Calgary	14,231	40,284	54,515
Edmonton	--	8,646	8,646
Toronto	7,843	--	7,843
Vancouver	161,831	251,778	413,609
Total	183,905	300,708	484,613
Jan-Dec, 2020	Air Canada	WestJet	Total
Calgary	11,652	18,560	30,212
Edmonton	--	--	--
Toronto	9,536	--	9,536
Vancouver	46,190	103,704	146,490
Total	67,378	122,264	189,642
% change	Air Canada	WestJet	Total
Calgary	-18.1%	-53.9%	-44.6%
Edmonton	--	-100.0%	-100.0%
Toronto	21.6%	--	21.6%
Vancouver	-71.5%	-58.8%	-64.6%
Total	-63.4%	-59.3%	-60.9%

Source: OAG, US BTS

TRAVEL TRENDS



GENERAL CHANNEL DISTRIBUTION

Average Time Spent with Media in Canada, 2018-2022

hrs:mins per day among population

	2018	2019	2020	2021	2022
Digital	4:50	4:58	5:32	5:23	5:28
—Mobile (nonvoice)	2:59	3:08	3:31	3:30	3:36
—Smartphone	2:05	2:13	2:33	2:32	2:37
—Tablet	0:53	0:55	0:57	0:58	0:58
—Desktop/laptop*	1:51	1:50	2:02	1:53	1:52
TV**	3:09	3:04	3:14	2:58	2:55
Digital video***	1:27	1:32	1:46	1:44	1:46
Radio**	1:32	1:29	1:20	1:21	1:17
Print**	0:21	0:20	0:17	0:18	0:17
—Newspapers	0:17	0:16	0:14	0:14	0:14
—Magazines	0:05	0:04	0:04	0:04	0:04
Total	9:52	9:53	10:24	9:59	9:57

Daily time spent in Canada will break through the 10-hour mark this year due to COVID-19

Digital is the key channel

GENERAL CHANNEL DISTRIBUTION

Which Sources Influence Travelers in Canada and the US When Considering Travel Destinations?, Sep 2019

% of respondents

Recommendations from friends and family

58%

Travel blogs or websites

35%

Recent news about the destination

25%

Deal newsletters and sites

21%

TV programs about the destination

18%

Ads (e.g., on TV, radio, press)

18%

Travel magazines

18%

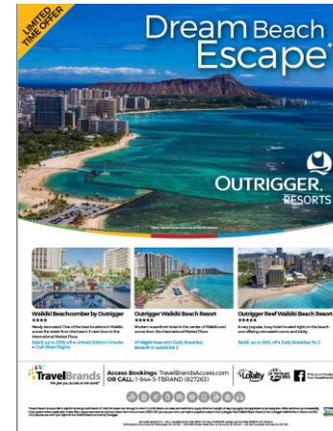
Posts on social media from influencers

15%

Source: Amadeus, "Digital Footprints: Discovering Online Traveler Needs in North America," Nov 19, 2019

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ISLANDS EXPERIENCES **HAWAIIAN ISLANDS** CULTURE PLANNING

See Hawaii Like a Local

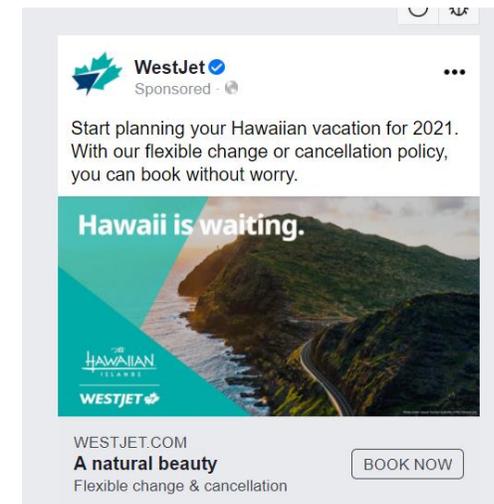
Unique cultures, flavors and experiences. Discover all through the eyes of those who are lucky enough to live here with the Hawaii Visitors and Convention Bureau's 2020 Vacation Planner. Written by local experts, it offers insight to the rich history and communities of the six islands, along with valuable insider tips for adventures by land, air or sea, only-in-the-island dining and volunteer experiences, and made-in-Hawaii shopping ideas.

Start your trip with one click.



Kauai - Peaceful, lush, naturally spectacular.

With waterfalls that carve their way down canyons and mountain ridges, dazzling white-sand beaches and cliffs that soar out of the sea, Kauai's wild beauty retains a feel of its idyllic past and offers opportunities for adventures.



Hawaii - gohawaii.com (CA - French, English) Published by Khovos Social Marketing on January 15 #LiftHawaiiRipple: "Water is the driving force of all nature." - Leonardo Da Vinci #LiftHawaiiRipple: http://bit.ly/2Nw4889



Get More Likes, Comments and Shares When you boost this post, you'll show it to more people 6,871 People Reached 577 Engagements Sue Walker, Joe Pierre S and 282 others 16 Comments 27 Shares

TRAVEL SENTIMENT

- **Federal government discouraging international travel implementing stricter measures**
- 14 day quarantine, negative COVID test 72 hours prior, mandatory hotel stay upon arriving in Canada (4 airports)
- Provinces discouraging interprovincial travel, limited social interactions and partial or total lockdowns in effect
- Travel intentions remain low, mostly domestic and drive vacations
- Older Canadians less likely to travel
- Travel planning decrease in major markets BC(-34%) ON(-32%)
- Longer planning cycle
- **Flexible booking and cancellation policies will encourage travel confidence**
- **Health & safety protocols key for booking accommodation**
- VFR large motivator
- 1/3 Snowbirds traveling:
 - Delayed departure - AZ & FL top winter spots
 - Mex, Caribbean & Central America increased vs. USA

Coronavirus Impact: When Adults in Select Countries Feel Comfortable Traveling, Oct 2020

% of respondents

	Q4 2020	Q1 2021	Q2 2021	Q3 2021
US	37%	35%	50%	58%
Canada	20%	22%	33%	59%
Brazil	42%	52%	47%	65%
Mexico	40%	46%	55%	65%
Germany	22%	22%	41%	57%
UK	22%	25%	52%	64%
France	32%	29%	43%	62%
Italy	25%	24%	44%	76%
China	47%	48%	50%	60%
Japan	32%	33%	39%	49%
Australia	35%	41%	47%	56%

Note: ages 25+

Source: Expedia Group Media Solutions, "Traveler Sentiment & Influences: 2020-2021," Dec 10, 2020

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eMarketer | InsiderIntelligence.com

TARGET AUDIENCE



TARGET AUDIENCE



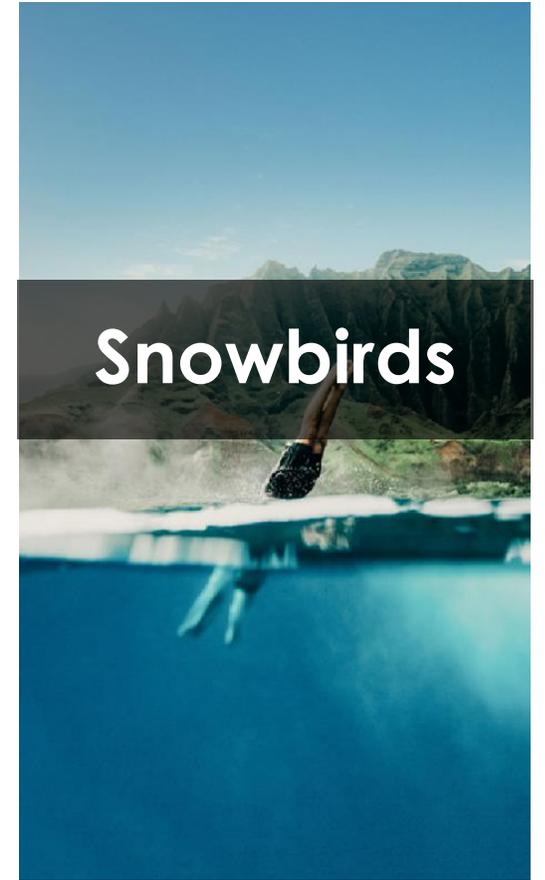
**Affluent
Travelers**



Romance



**Experience
Seekers**



Snowbirds

TARGET AUDIENCE

Mindful Traveler

Affluent Traveler

Entice the affluent traveler with unique experiences

Romance

Entice couples to plan their next romantic getaway to Hawai'i

Experience Seekers

Reach people with an already established interest in seeking fun and adventure

Snowbirds / Retirees

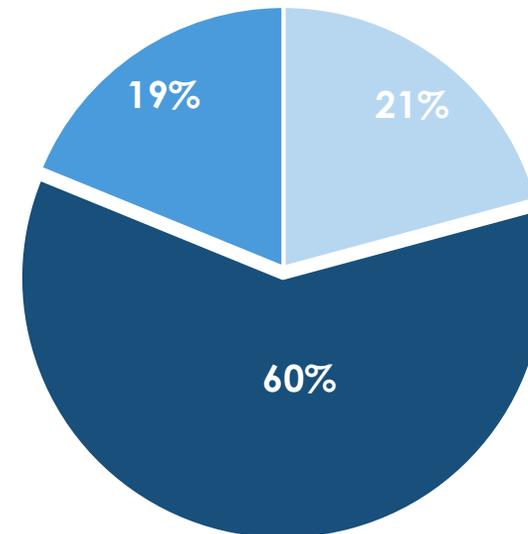
Reach people who are retired and looking to escape the Canadian winter

TARGET AUDIENCE

Priority Markets:

1. British Columbia (Vancouver)
2. Alberta (Calgary and Edmonton)
3. Ontario (Toronto)
4. Balance of Canada (Montreal)

■ 18-34 ■ 35-64 ■ 65+

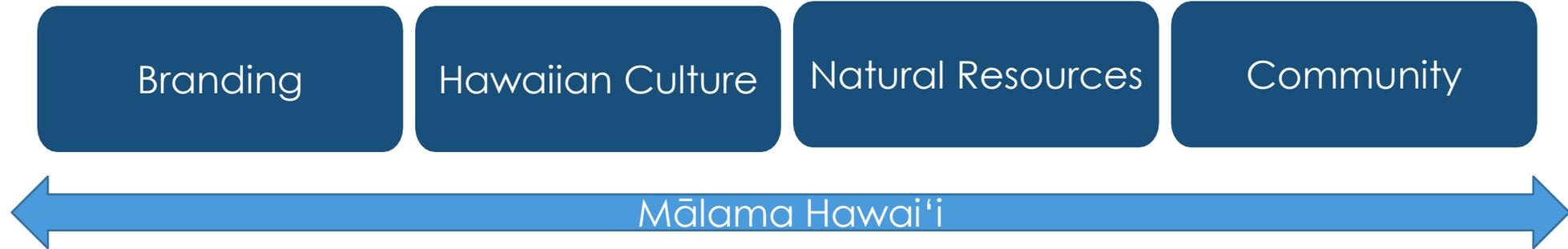


Source: Numeris RTS Canada Spring '19

CONSUMER STRATEGY



APPROACH



DIRECT TO CONSUMER

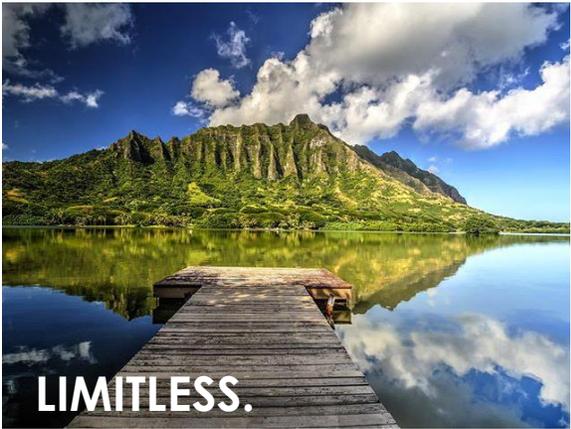
Target the consumer to keep the Hawaiian Islands brand top of mind when looking for a destination that offers culture, beautiful beaches, safety and a diversity of activities. Ultimately, communicate to Canadian travelers that Hawai'i expects them to respect local communities, natural resources and to preserve the Hawaiian Islands essence and values.

PUBLIC RELATIONS

Use relationships with consumer and travel writers as well as influencers in traditional, digital and social media outlets to showcase the Hawaiian Islands, their values and culture, to consumers in their articles, posts and blogs.

CORE MESSAGING

Our strategy and actions are founded within the pillars of Branding, Community, Hawaiian Culture and Natural Resources with a focus on Mālama.



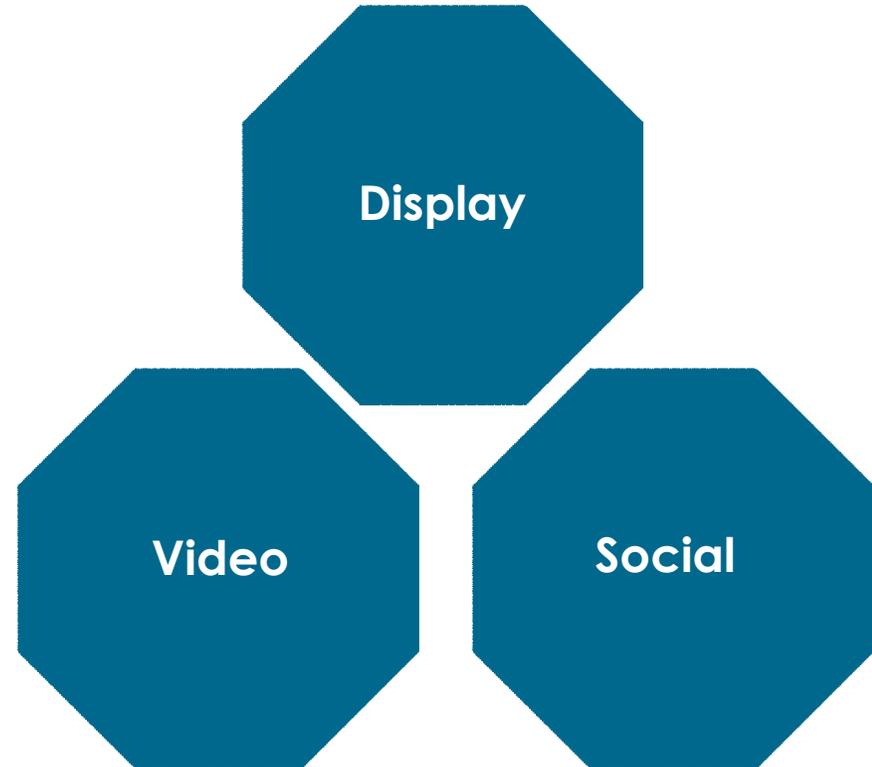
MEDIA

Media strategy will require the ability to pivot at a moments notice.

Focus on mediums that allow for real-time insights (including online behaviour), flexibility, and immediate pause without penalty.

Envionics insights will be used to segment as well as first party data will be leveraged, which would then be onboarded across programmatic media infrastructure.

Yougov research will provide ongoing sentiment for managing the messaging.



TACTICS

The following tactics will run via display and video and optimized towards performance.



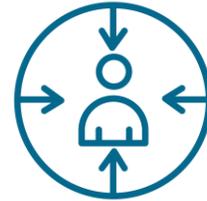
AUDIENCE SEGMENT TARGETING

Reach prospective consumers that fall into our key pillars.



KEYWORD TARGETING

Serve ads to consumers who are actively research luxury destinations.



RETARGETING

Engage with consumers who have visited one of our webpages or clicked on an ad.



ORGANIC AND PAID SOCIAL

Continuous feed in HTCAN social networks, organic and paid (budget permitting) to keep travelers engaged with the destination

Note: Retargeting would be 100% display – no video.

PUBLIC RELATIONS

	Millennials	35-64	Boomers
Luxury		X	X
Romance	X	X	X
History/ Culture	X	X	X
Outdoors/Nature	X	X	X
Adventure/Recreation	X	X	X
Family		X	X



Targeted media
Newsletters
Media calls
Individual Media trips
Virtual media events
Promotional opportunities
Editorial
Media outreach
Influencers outreach
Clipping reports
Crisis management

Integration of Mālama in the message; focus on media and journalists with responsible tourism angles

MEDIA CAMPAIGNS

Partner with radio and/or broadcast stations in key markets to provide their listeners / viewers with the opportunity to win a vacation to Hawai'i. Integrate hotels and airlines to help facilitate the trips

Promotions could include promo spots, live mentions, contest page, social media posts, etc.

Partner with major OTAs or loyalty program providers to promote the destination

Emphasis on Responsible Tourism and Mālama Hawai'i



Zoomer Radio



TRADE STRATEGY



TRADE STRATEGY

- Consumers returning to Travel Advisors
- COVID triggered travel advisor search
- Education and update crucial for travel advisors
- Incentivize the engagement with trade promotions
- Training campaigns in partnership with trade media
- Partnerships with tour operators
- Responsible tourism & Mālama integration in all campaigns, training, newsletters, editorial



HAWAII
Destination Specialist

Become a Hawai'i Destination Specialist for your chance to **WIN \$150** AMAZON GIFT CARD*

Complete certification one & two of the Hawai'i Destination Specialist Program and automatically be entered for a chance to WIN!

Hawaiian Cultural Training

As Hawai'i's tourism industry prepares to welcome visitors back, please join this Hawai'i cultural training webinar led by the Native Hawai'i Hospitality Association and Kuli'ani Local Cultural Trainer Hiamani Shooka. This webinar will discuss Hawai'i values that are essential to hosting in Hawai'i and foster a sense of belonging, encourage personal initiative, and build a collective knowledge of the history of place.

Sep 10, 2020 02:00 PM EDT [REGISTER NOW!](#)

The Hawai'i Destination Specialist Program is a tiered, self-guided educational program that delivers in-depth knowledge and insight as well as effective sales tips to transform you into a better travel advisor.

Why become a Hawai'i Destination Specialist?

- Consumer referrals
- Use of the Hawai'i Destination Specialist Logo
- One year subscription to HAWAII magazine
- Invitation to attend Aloha Canada events

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FLIGHT CENTRE clubred

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THE SPIRIT OF ALOHA

CREDIT: HAWAII TOURISM AUTHORITY (HTA) / TOR JOHNSON

There's no place like **Hawaii**. Escape the ordinary and find yourself amongst beautiful black sand beaches, world-class waves, and lush green rainforests. A Better Beach holiday is the way to experience the Hawaiian Islands.

[DISCOVER HAWAII](#)

Can't wait? Call us at 1 855 796 8359 or visit us in-store today.

TRADE STRATEGY

Travel Agents

- Educational/training:
 - Webinars
 - Newsletters
- Hawai'i Destination Specialist Program
 - Travel trade campaign
 - **2018 – 12,659**
 - **2019 – 13,197**
 - **2020 – 13,286**



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Your one stop incentive shop.

hotelbeds

HAWAII TOURISM
CANADA

Trade shows

- WestJet Expo (tentative Fall)
- TravelBrands Agent appreciation (tentative late spring)
- ACV Product Launches (tentative late summer)

Aloha Canada virtual (October)

- 20+ partners
- NaHHA partnership
- Cultural webinars
- Product webinars
- Trade show
- Prizes
- Gifts

TRADE STRATEGY

Trade Media:

- Travel trade media campaigns

Tour Operators:

- Co-op campaigns
- Product Launches
- Training
- Fam trips (virtual/in person)
- Sustainable approach/market

Airlines:

- Joint campaigns
- Malama in-flight videos
- Loyalty Programs

VACANCES
AIR CANADA
VACATIONS 

 **TravelBrands**

FLIGHT CENTRE®

WESTJET 
vacations

 adventures™

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 **GECKOS**
ADVENTURES

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 *Peregrine*

 RESPONSIBLE
TRAVEL

HAWAII TOURISM
CANADA

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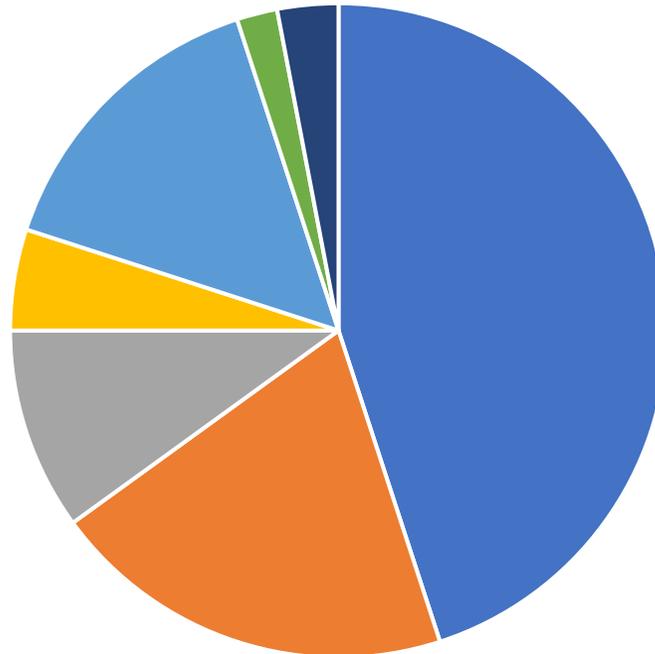
MCI



LEAD DEVELOPMENT STRATEGY

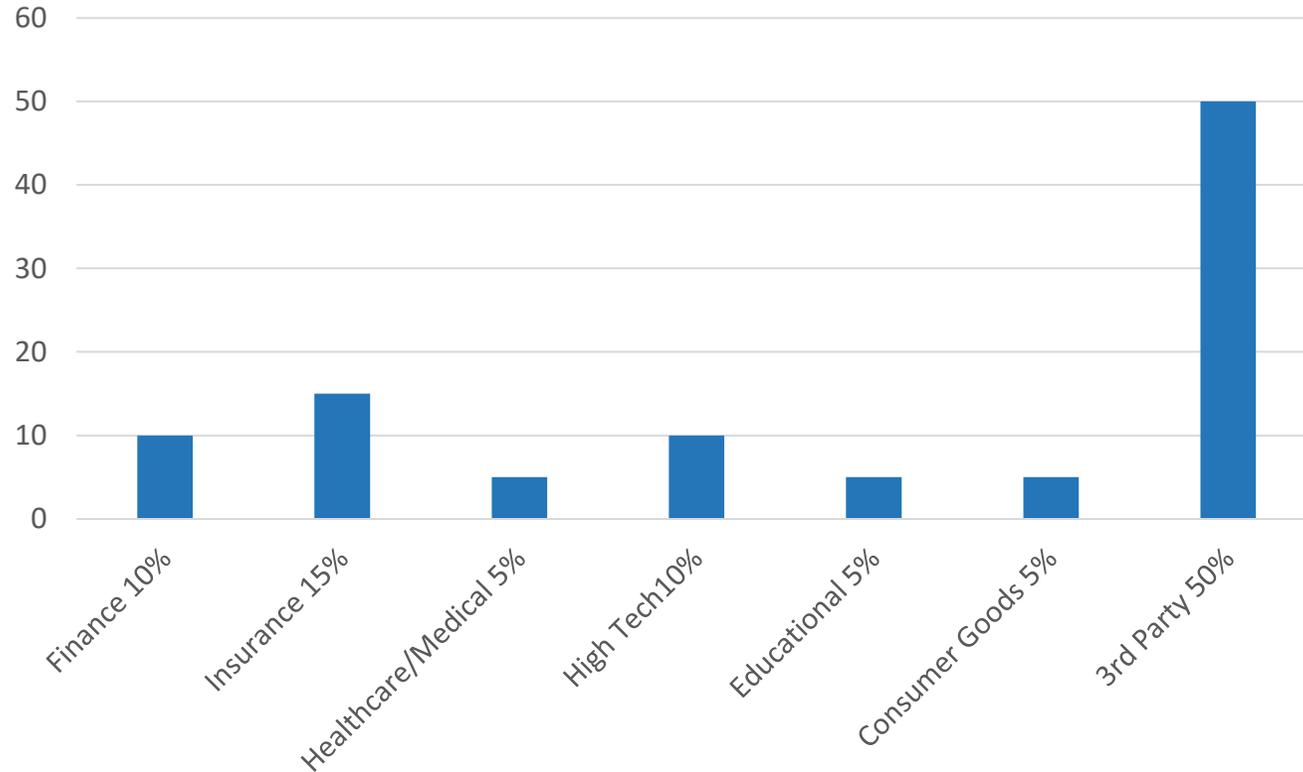
Deployment

- Sales Calls 45%
- Webinars/Education 20%
- Accelerate Conversion 10%
- Partnership Development 5%
- Higher Need Periods 15%
- Communications 2%
- Cultural/Festivals 3%



- Constant communication with MCI planners & Hawaiian stakeholders
- Newsletters to MCI data base
- Outreach for leisure groups
- Work with Global HTA MCI team for planner specific webinars
- MCI virtual events:
 - SITE
 - MPI
 - CSAE

TARGET AUDIENCE – KEY VERTICAL SEGMENTS



Groups 2021

Confirmed:

- April 2022, 200-250 pax, Maui Essential Meetings (auto parts)

Tentative:

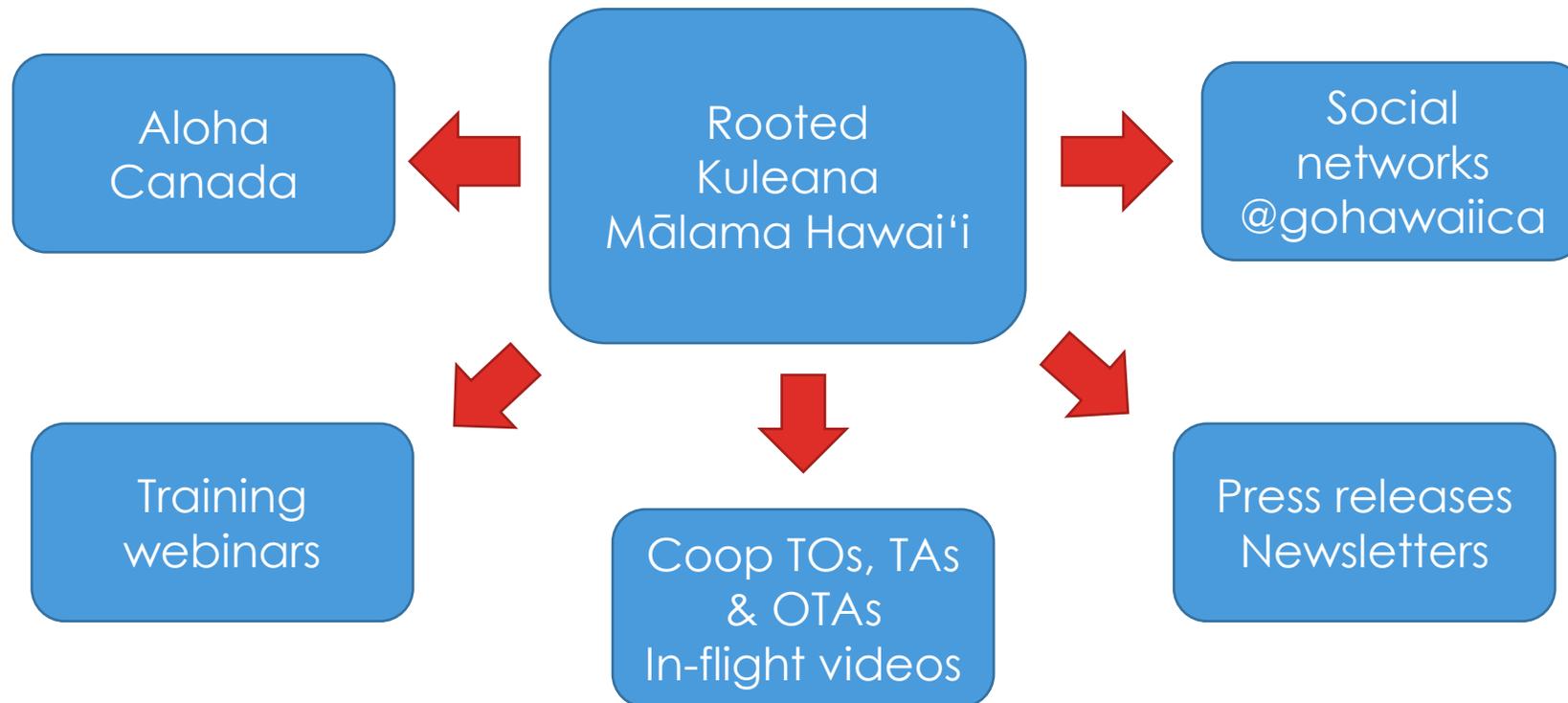
- Oct 2021, 105 pax, Maui Shaw Communications.
- Oct 2021, 50 pax, Maui LGA Airport (Canadian planner)
- Mar 2022, 120 pax, Maui & Hawai'i Island Veritiv (Canadian planner)

Based on Top 20 planners/companies within each vertical market in Canada

RESPONSIBLE TOURISM



RESPONSIBLE TOURISM



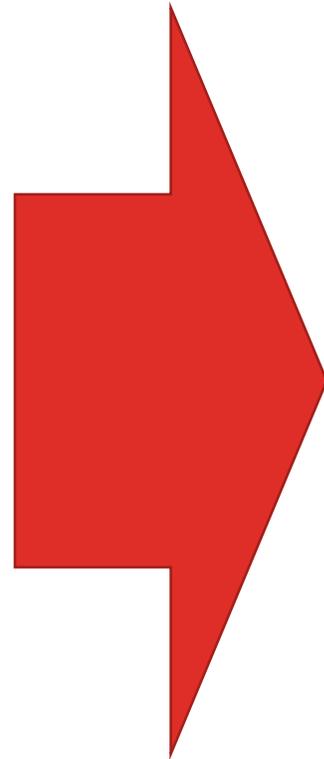
RESPONSIBLE TOURISM

Branding

Hawaiian Culture

Natural Resources

Community



NaHAA webinar promotion

Cultural inclusion Aloha Canada

Environmentally friendly promotions

Encourage agents and travelers - digital info

Mālama Hawai'i campaign

BMP TIMELINE



BMP TIMELINE

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Canada Market	Vaccination Campaign												
	Travel restrictions												
	Flights from Canada to Hawai'i												
Advertising	Organic posting												
	Paid social												
	Digital campaign												
	Travel trade media campaign HDSP												
	OTA campaign/ Loyalty program campaign												
Public Relations	Individual media fams												
	Discover America Day												
Travel Trade	Air Canada Product Launch												
	TravelBrands Agent Appreciation Event												
	WestJet Expo												
	Trade fam trip												
	Webinar series												
	Aloha Canada 2021												
	Coop campaigns												
MCI	SITE Educational Day												

Note: all these dates are tentative depending in the development of COVID-19, government travel policies, vaccination campaigns, etc.

BMP BUDGET



BMP BUDGET

	Q1	Q2	Q3	Q4	Annual
Social Networks & Advertising	4,065	4,065	74,311	55,957	138,398
Media Tracking PR & Promotions	2,400	2,400	9,650	9,550	24,000
Trade Marketing	3,000	3,000	27,000	67,000	100,000
Research	NA	NA	NA	NA	NA
Hawaiian Culture Integration	0	0	0	3,000	3,000
Admin Costs	33,646	33,646	33,646	33,646	134,602
Total	43,111	43,111	144,607	169,172	\$400,000

BMP PERFORMANCE MEASURES



BMP PERFORMANCE MEASURES

	Annual Target	Semi-Annual Targets	
	2021	Jan-Jun	Jul-Dec
LEISURE MEASURES			
Consumer Ad Measures			
TV Reach	0.0%	0.0%	0.0%
Print Reach	0.0%	0.0%	0.0%
Digital Reach	0.0%	0.0%	0.0%
Radio Reach	0.0%	0.0%	0.0%
TV Gross Impressions	0	0	0
Print - Total Audited Circulation	0	0	0
Digital Gross Impressions - Total Audience	8,282,051	0	8,282,051
Radio Gross Impressions	0	0	0
Out of Home Gross Impressions	0	0	0
Travel Trade Ad Measures			
Print - Total Audited Circulation	75,000	0	75,000
Digital Gross Impressions - Total Audience	1,500,000	0	1,500,000

BMP PERFORMANCE MEASURES

	Annual Target	Semi-Annual Targets	
	2021	Jan-Jun	Jul-Dec
LEISURE MEASURES			
Public Relations Measures			
<i>No. of Media/PR Calls</i>	100	50	50
<i>No. of Press Releases Issued</i>	12	6	6
...Publicity Value			
<i>Print</i>	\$1,000,000	\$500,000	\$500,000
<i>Online</i>	\$2,000,000	\$1,000,000	\$1,000,000
<i>Broadcast</i>			
...Number of Impressions			
<i>Print</i>	5,000,000	2,000,000	3,000,000
<i>Online</i>	10,000,000	5,000,000	5,000,000
<i>Broadcast</i>			
...Media FAMs/Press Trips			
<i>No. of Group Media FAMs</i>	0		
<i>No of Articles Generated</i>			
<i>No. of Individual Press Trips</i>	6	0	6
<i>No of Articles Generated</i>	11		11

BMP PERFORMANCE MEASURES

	Annual Target	Semi-Annual Targets	
	2021	Jan-Jun	Jul-Dec
LEISURE MEASURES			
Leisure Travel Trade			
<i>...Trade Shows</i>			
<i>No. of Trade Shows</i>	4	0	4
<i>No. of Appointments</i>	200	0	200
...Travel Trade FAMs			
<i>No. of Travel Trade FAMs</i>	1		1
<i>No. of Participants</i>	10		10
...Trade Education			
<i>No. of Trade Education Sessions</i>	6		6
<i>No. of Participants</i>	700		700
<i>No. of Agents Completed Online Training Program</i>	405	202	203
Industry Collaboration			
<i>No. of Meetings with Hawai'i Industry Partners</i>	24	12	12
<i>No. of Hawai'i Industry Partners Met With</i>	24	12	12

BMP PERFORMANCE MEASURES

	Annual Target	Semi-Annual Targets	
	2021	Jan-Jun	Jul-Dec
LEISURE MEASURES			
Social Media Metrics			
FACEBOOK			
<i>Total Impressions Gained</i>	0	-	-
<i>Total Interactions Gained</i>	0	-	-
<i>Total Fan Count</i>	0	-	-
<i>Increase in Fans</i>	0	-	-
<i>Total Posts</i>	156	78	78
INSTAGRAM			
<i>Total Impressions Gained</i>	0	-	-
<i>Total Interactions Gained</i>	0	-	-
<i>Total Fan Count</i>	0	-	-
<i>Increase in Fans</i>	0	-	-
<i>Total Posts</i>	156	78	78
TWITTER			
<i>Total Impressions Gained</i>	0	-	-
<i>Total Interactions Gained</i>	0	-	-
<i>Total Fan Count</i>	0	-	-
<i>Increase in Fans</i>	0	-	-
<i>Total Posts</i>	156	78	78

Note: It is impossible to project the number of impressions without paid social media

BMP PERFORMANCE MEASURES

	Annual Target	Semi-Annual Targets	
	2021	Jan-Jun	Jul-Dec
MCI MEASURES			
MCI Trade			
...Trade Shows			
No. of Trade Shows	4	2	2
No. of Appointments			
...MCI FAMs	0		
No. of MCI FAMs	0		
No. of Participants	0		
...MCI Education			
No. of MCI Education Sessions	5	2	3
No. of Participants	50	20	30
No. of MCI Sales Calls	60	30	30
MCI Room Nights			
Total Citywide MCI Tentative Room Nights	N/A		
Total Citywide MCI Definite Room Nights	N/A		
Total Citywide MCI New to Hawai'i - Definite Room Nights	N/A		
Total Single Property MCI Tentative Room Nights	10,000	2,800	7,200
Total Single Property MCI Definite Room Nights	2,000		2,000
Total Single Property MCI New to Hawai'i - Definite Room Nights	1,000	500	500

HTA KEY PERFORMANCE INDICATORS



HTA KEY PERFORMANCE INDICATORS

	Target
PPPD\$	Meet/Exceed DBEDT Forecast for 2021: \$154.90
Total Expenditure	Meet/Exceed DBEDT Forecast for 2021: \$810M
Visitor Satisfaction - Met/Exceeded Trip Expectation	Maintain/Improve Score from 2019: 97.5%
Resident Sentiment - Tourism has brought more benefits than problems – strongly/somewhat agree	Maintain/Improve Score from 2019: 58%



HAWAII TOURISM™

CANADA