



# **2021 MARKET UPDATE**

**HTA BOARD OF DIRECTORS MEETING  
5.27.2021**

# AGENDA

- Market Conditions
- Target Audience
- Consumer Strategy
- Trade Strategy
- Regenerative Tourism / DMAP Initiatives



# MARKET CONDITIONS

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# MARKET CONDITIONS

## U.S Economy

- Economic recovery is strong, in part due to three rounds of economic stimulus.
- GDP growth forecast for the remainder of 2021 is at 3.7% and up 3.1% in 2022, according to Conference Board.
- The primary driver of the predicted rapid economic expansion will be a surge in consumer spending as the economy fully reopens. High and increasing vaccination rates and low new COVID-19 case numbers indicate that the reopening process may be complete for much of the country by the end of the summer.

# MARKET CONDITIONS

## U.S COVID-19 Cases and Vaccinations

	U.S.	Hawai'i
Total Cases Reported	32,771,733	33,834
7-Day U.S. Average Cases	35,442	78
Deaths	583,074	492
Vaccines Administered	266,596,486	1,398,499
Received One Dose	154,624,231	880,868
Fully Vaccinated	118,987,308	623,006
% of Population Fully Vaccinated	37%	44%

# MARKET CONDITIONS

## U.S Travel Restrictions - Residents

Travel within the United States. CDC recommends delaying travel until you are fully vaccinated, 2 weeks after second dose.

- Wear a mask over your nose and mouth. Masks are required on planes, buses, trains, and other forms of public transportation traveling into, within, or out of the United States and in U.S. transportation hubs such as airports and stations.
- Avoid crowds and stay at least 6 feet/2 meters (about 2 arm lengths) from anyone who is not traveling with you.
- Wash your hands often or use hand sanitizer (with at least 60% alcohol)

## U.S Travel Restrictions – Arrivals

All air passengers coming to the United States, including U.S. citizens and fully vaccinated people, are required to have a negative COVID-19 viral test result no more than 3 days before travel or documentation of recovery from COVID-19 in the past 3 months before they board a flight to the United States.

# MARKET CONDITIONS

## U.S Arrivals to Hawai'i

	U.S. Total	U.S West	U.S East
2020 P	1,982,449	1,306,388	676,061
2019	6,871,839	4,595,319	2,276,520
2018	6,377,352	4,203,894	2,173,458
January 2021 P	74,133	47,477	26,656
February 2021 P	228,760	164,861	63,899
March 2021 P	429,279	296,117	133,162

# MARKET CONDITIONS

## U.S Transpacific Seat Capacity

Preliminary as of 5/18/21 –Subject to adjustment

	# of SEATS June 2019	# of SEATS June 2020	# of SEATS June 2021P	# of SEATS July 2019	# of SEATS July 2020	# of SEATS July 2021P	# of SEATS August 2019	# of SEATS August 2020	# of SEATS August 2021P
O'ahu	441,174	81,216	500,040	462,801	119,333	553,939	453,028	140,757	527,334
Maui	257,829	12,885	307,887	273,254	18,461	343,021	248,915	16,876	331,686
Kona	104,573	3,281	126,530	110,095	7,528	139,115	98,448	9,657	137,772
Kaua'i	90,144	2,340	87,527	94,336	2,780	100,555	86,220	4,439	106,592
Hilo	4,700	0	5,178	5,146	0	5,549	4,804	0	5,549
<b>Total</b>	<b>898,420</b>	<b>99,722</b>	<b>1,027,162</b>	<b>945,632</b>	<b>148,102</b>	<b>1,142,179</b>	<b>886,611</b>	<b>171,729</b>	<b>1,108,933</b>



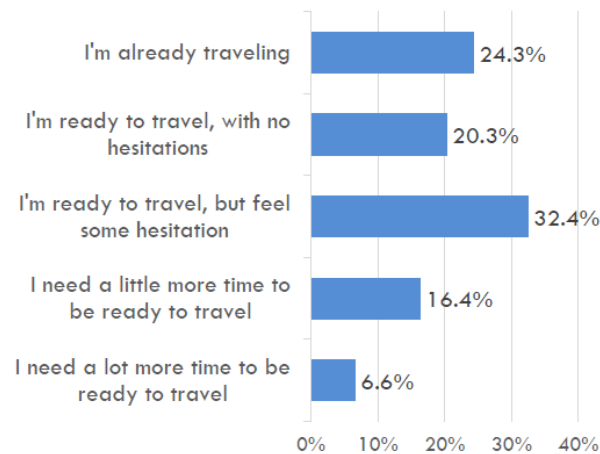
# MARKET CONDITIONS

## U.S Traveler Sentiment

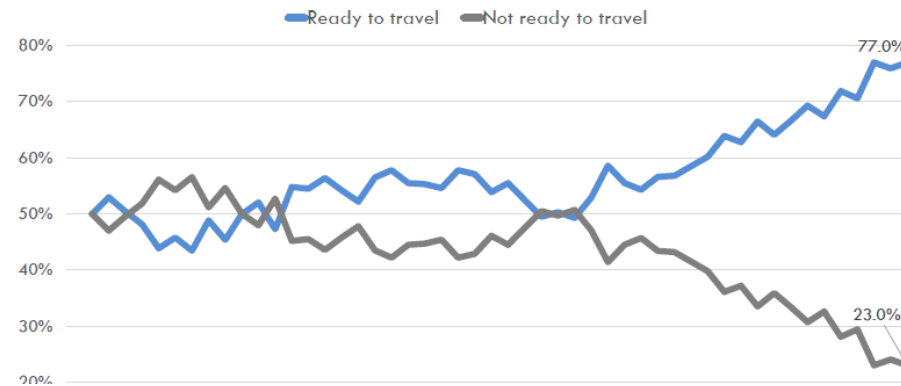
COVID concerns keep dropping as 58% of American travelers are now fully vaccinated:

American travelers' personal health concern levels about COVID are at all time low, with nearly a third now relatively unconcerned about contracting the virus. Confidence in travel's safety continued to increase. The majority of American travelers remain ready to travel and marketable: Over 70% of American travelers say they are excited and open to new trips in the near term, as well as highly desiring of travel inspiration.

**Question:** When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)



Historical data



# MARKET CONDITIONS

## Competitive Destinations



### NYC & COMPANY PRESENTS "NYC REAWAKENS"

NYC & Company Also Announce Largest-Ever \$30 Million Marketing Campaign for New York City Tourism Recovery



### Visit California awarded upwards to \$24M Spring Marketing Push

Visit California is investing in brand advertising to drive demand in anticipation of the summer travel season and beyond.



Various European Countries are opening to US travelers this summer



Nonstop to Europe this summer.

Get ready to make your travel plans with expanded seasonal flights to Europe.

U.S. travelers can now visit Greece, Italy, Croatia and Spain. So take off and explore the beauty of the Greek Islands, picturesque villages along the Amalfi Coast, the pebble-rock beaches of Croatia or the brilliant architecture of Barcelona. Use money or miles to book your summer adventure.

# TARGET AUDIENCE

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# TARGET AUDIENCE

The Mindful Traveler – respectful, responsible, environmentally conscious

- Adults 25-54
- Income \$100K+
- Participates in 2+ activities while traveling
- Skew toward repeat Hawai'i Visitors
- Nationwide coverage



# The Mindful Traveler

Seek to explore and make meaningful memories

Respect the culture and environment of the places they visit

Desire to support something bigger than themselves



# CONSUMER STRATEGY

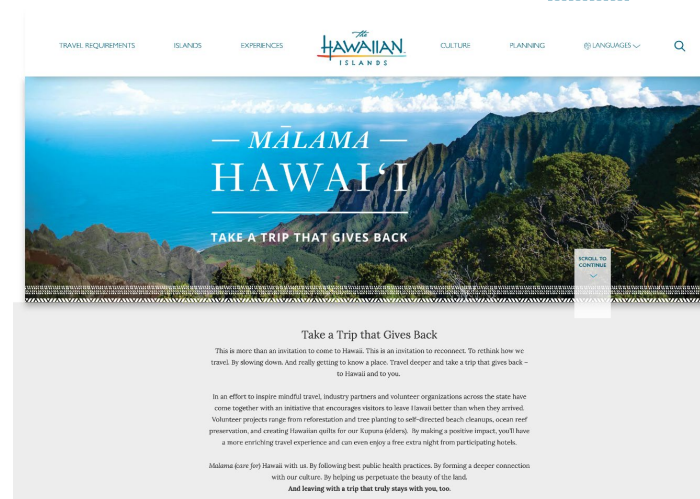
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**Mālama Hawai'i Campaign**

# MĀLAMA HAWAI'I PARTNERS

- 95 partners... and counting
  - Listed on gohawaii.com/malama
- Volunteer programs continues to grow:
  - Amy B.H. Greenwell Ethnobotanical Garden
  - Hawaii Environmental Restoration
  - Kipuka Olowalu
  - Maui Cultural Lands
  - Papahana Kuaola
  - Leeward Haleakalā Watershed Restoration Partnership
  - E Ala Pa'aiiau



## Statewide

[Alaska Airlines](#)

## Kauai

[Hilton Garden Inn Kauai at Wailua Bay](#)

[The ISO](#)

[Kaha Lani](#)

[Kauai Grand Hyatt Kauai Resort & Spa](#)

[Kauai Kailani](#)

[Kauai Koloa Landing Resort at Poipu, Autograph Collection](#)

[Kauai's Marriott Resort](#)

[Kiahuna Plantation & the Beach Bungalows](#)

[Koa Kea Hotel & Resort](#)

[Makahauna](#)

## Maui

[Andaz Maui at Wailea Resort](#)

[Chase 'N Rainbows](#)

[Courtyard Maui Kahului Airport](#)

[Fairmont Kea Lani](#)

[Four Seasons Resort Maui at Wailea](#)

[Hana Maui Resort](#)

[Hyatt Regency Maui Resort & Spa](#)

[Kaanapali Alii](#)

[Kamaole Sands](#)

[Lahaina Shores Beach Resort](#)

[Makena Surf](#)

[Paki Maui](#)

[Polo Beach Club](#)

[Puunoa Beach Estates](#)

[Residence Inn Maui Wailea](#)

[The Ritz-Carlton, Kapalua](#)

[Sheraton Maui Resort & Spa](#)

[Wailea Beach Villas](#)

[Wailea Ekahi Village](#)

[Wailea Elua Village](#)

[Wailea Ekolu Village](#)

[Wailea Grand Champions](#)

[Wailea Beach Resort](#)

[The Westin Maui Resort & Spa, Kaanapali](#)

## Island of Hawaii

[Courtyard King Kamehameha's Kona Beach Hotel](#)

[Fairmont Orchid, Hawaii](#)

[Haliu Kai](#)

[Hilo Hawaiian Hotel](#)

[Kanaloa at Kona](#)

[Kona Reef](#)

[Mauna Kea Beach Hotel, Autograph Collection](#)

[Sheraton Kona Resort & Spa at Keauhou Bay](#)

[Waikoloa Beach Marriott Resort & Spa](#)

[Waimea Country Lodge](#)

[The Westin Hapuna Beach Resort](#)

## Volunteer Opportunities

[Battleship Missouri Memorial](#)

[Hawaii Land Trust](#)

[Hawaiian Legacy Reforestation Initiative](#)

[Lahaina Restoration Foundation](#)

[Pacific Whale Foundation](#)

[Sustainable Coastlines Hawaii](#)

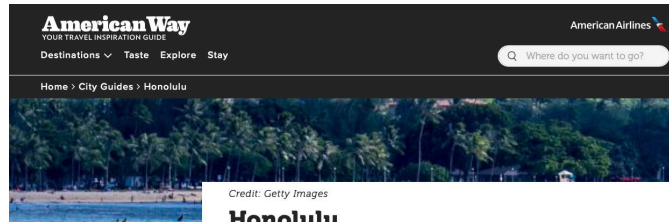
[Travel2Change](#)

[Uluhau o Hualalai](#)

[Waikoloa Dry Forest Initiative](#)



# MĀLAMA HAWAI'I PARTNER EXAMPLES



Credit: Getty Images  
**Honolulu**

Your definitive guide to the Hawaiian capital

Seasonal weather

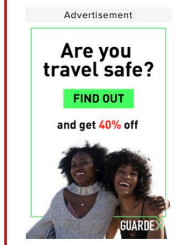
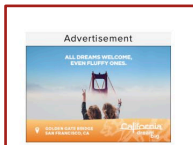


The main gateway to the Hawaiian Islands, Honolulu is a modern cosmopolitan city with a unique blend of cultures and cuisines, energetic arts and nightlife scenes, a historic district which boasts the US's only royal palace, and a variety of great shops. It is surrounded by some of the world's most spectacular coastal cliffs and epic forest trails offering breathtaking views of enchanted bays and beyond. Yet Honolulu's biggest draw is undoubtedly its beaches — from Waikiki, the ever-bustling surfer's paradise on Oahu's southeastern shore, to the hundreds of near-deserted coves where your sundowner companions could be a family of sea turtles.

*Malama (care for) Hawaii with us. In an effort to inspire mindful travel, industry partners and volunteer organizations across the Hawaiian Islands have come together with an initiative that encourages visitors to give back to the destination. Volunteer projects range from reforestation and tree planting to self-directed beach cleanups, ocean reef preservation and even creating Hawaiian quilts for our kupuna (elders). By making a positive impact, you'll have a more enriching travel experience and can even enjoy a free extra night from participating hotels.*

*Travel deeper and take a trip that gives back—to Hawaii and to you. For more information and for a list of participating partners, visit [gohawaii.com/malama](http://gohawaii.com/malama). While you're there, don't forget to participate in the [Hawaii Safe Travels Program](#).*

— MĀLAMA —  
HAWAI'I  
TAKE A TRIP THAT GIVES BACK



## Take a Trip That Gives Back

When you visit The Kahala, we want you to truly experience our island home and travel deeper. Connect with our community through our **Malama** Hawaii offer, which provides 20% off your stay in exchange for participating in one of the sustainability initiatives offered by Travel2Change and KISCA. This package is dedicated to mindful travel—encouraging you as a visitor to leave Hawaii better than when you arrived.

LEARN MORE

### Plant Your Legacy TREETMENT

Enjoy a unique opportunity to restore Hawaii's diverse ecosystem by planting a tree in your name, or in honor of someone you love. As a thank you, receive \$50 off a Kahala Spa treatment.

LEARN MORE



# Public Relations & Influencer Examples



# FIRSTHAND MEDIA EXPERIENCES

- **Jeff Jenkins**, Social influencer with *T+L*
- **Zahrah Farmer**, "Days with Zahrah" on KGO-TV (Bay Area) and Amazon Prime
- **Chaney Kwak**, Hemispheres
- **Kira West**, Social influencer with United
- **Jeanne Cooper**, SFGate, Frommer's Marin Magazine



*Meet cultural advisor Kumu Kaponu Kamaunu  
He taught me about "Mālama Hawai'i" and  
@fairmontkealani's self-directed beach clean-up  
voluntourism initiative utilizing the @4ocean  
Clean-Up kit*

# GOOD MORNING AMERICA

- Featured the Hawaiian Islands all morning on Friday, May 14
  - Taped segments filmed on Maui
  - LIVE filmed on O'ahu
- Included Mālama Hawai'i messaging and campaign footage
- Total estimated publicity value: \$5,080,800



**Mālama Hawai'i**  
Aquaculture

# MĀLAMA HAWAI'I - AQUACULTURE VIDEO

**Mālama Hawai'i**  
Sustainable Farming

# MĀLAMA HAWAI'I - SUSTAINABLE FARMING VIDEO



**Mālama Hawai'i**  
Reforestation

# MĀLAMA HAWAI'I – REFORESTATION VIDEO

**Mālama Hawai'i**  
Habitat Stewardship

# MĀLAMA HAWAI'I – HĀBITAT STEWARDSHIP VIDEO

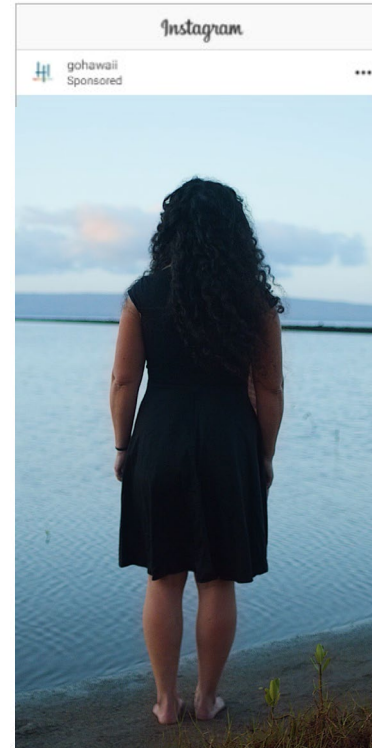
**Mālama Hawai'i**  
Teaser

# MĀLAMA HAWAI'I TEASER VIDEO

# Social Media

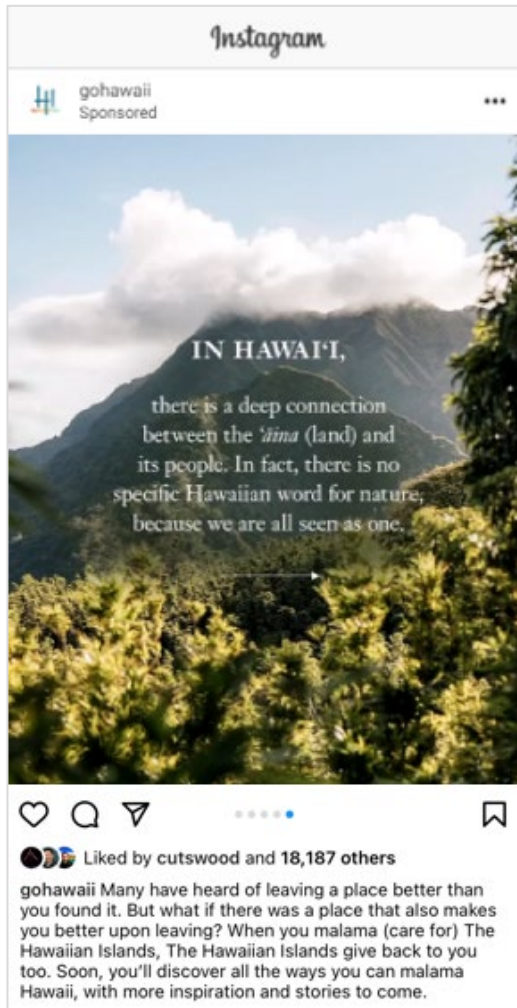


# SOCIAL MEDIA EXAMPLES





# SOCIAL MEDIA EXAMPLES



**chrigi\_schuler** Also whole world and every culture should be treated in this spirit 🙌🏻💚👍 Mahalo nui loa for this beautiful post ❤️🌺👍

2d 2 likes Reply

**traseamay** Hawaii is the most distinctive place on earth! 🙌🏻💚👍 indescribable really, but you did a good job here 😊

2d 2 likes Reply

**the.notorious.viv** Everything about this post - the intention put into it, the imagery, the open-hearted call to action - is felt with so much love + gratitude 🙌🏻

2d 2 likes Reply

**angil357** Mahalo.. I can not wait to give back once I'm living on this beautiful island! Relocating next week ❤️

2d 2 likes Reply

**detaild\_devill** 🙌🏻 @\_bepaa\_

2d 2 likes Reply

**mrsgiorgia** Mahalo! I would love to see these beautiful islands once more, as we did 8 years ago! Love from Italy 🌸

2d 2 likes Reply

**\_stephy.\_\_\_** I love your culture, inner feelings and the connection with the land 🙌🏻

2d 2 likes Reply

**gracielabach** Mahalo for this and I really hope to visit one day this beautiful place of earth ❤️

2d 3 likes Reply

**gohawaii** @gracielabach Mahalo for your support. 🙌🏻

2d Reply

**\_stephy.\_\_\_** I love your culture, inner feelings and the connection with the land 🙌🏻

2d 5 likes Reply

**gohawaii** @\_stephy.\_\_\_ Mahalo! 🌺

2d 1 like Reply

**catch621** We'd love to do something to make the islands better than when we arrived on our next trip. Can you share some opportunities on each island that visitors can take part in?

2d 4 likes Reply

**gohawaii** @catch621 Mahalo for your support. 🙌🏻 Please visit [www.gohawaii.com/malama](http://www.gohawaii.com/malama) to learn more!

2d 2 likes Reply

**proactproductshi** 🇺🇸❤️🔥

2d 3 likes Reply

**sharitakingthecoach** 🙌🏻🙌🏻

2d 3 likes Reply

**mezapanda501** I haven't ever been able to describe the feeling of connection I have with Hawaii. Thank you for putting it all together ❤️ Aloha

2d 1 like Reply

**mymimari8** word ❤️🙌🏻

2d 1 like Reply

**palitoluna** @bren\_lunaurrutia 🙌🏻🙌🏻

2d 1 like Reply

**marte\_engel** Aloha and mahalo for sharing this beautiful and important message ❤️🌺🌍 I can't wait to be back! Much love from Norway ❤️🇳🇴

2d 1 like Reply

**mckoi.z.md** ❤️❤️❤️ Indeed! Very true. I hope my first hand experience with this when I visited Maui for the very first time. I will always remember and cherish that moment. 🙌🏻🌺

2d 1 like Reply

— View 1 reply

**amy\_und** Would love to be there now!

2d 1 like Reply

**generationjetset** I literally tapped this 4 times I loved it so much. So beautiful. Cannot wait to come back! 🌺🌸❤️

2d 1 like Reply



Gohawaii.com







# GOHAWAII.COM/MALAMA



Find your Malama Hawaii experience below.

TRAVEL REQUIREMENTS ISLANDS EXPERIENCES **The HAWAIIAN ISLANDS** CULTURE PLANNING LANGUAGES  

			
<b>Aquaculture</b> <b>Noelani Lee</b> Visitors restoring traditional native Hawaiian masterworks discover the secret to healing a community - and themselves. <a href="#">MORE &gt;</a>	<b>Habitat Stewardship</b> <b>Kiai Collier</b> Volunteers leave a positive impact that lasts generations by protecting fragile habitats extending from the mountain to the ocean. <a href="#">MORE &gt;</a>	<b>Reforestation</b> <b>Sam Ohu Gon III</b> Hikers are led deep into a special realm - where species found nowhere else still reign - to conserve native ecosystems and the vibrant culture they sustain. <a href="#">MORE &gt;</a>	<b>Sustainable Farming</b> <b>Rick Barboza</b> By perpetuating endangered plants and recreating the centuries-old methods of his ancestors, a farmer gets volunteers' hands dirty planting not just native crops, but the seeds of Hawaii's sustainable future. <a href="#">MORE &gt;</a>

# Coop Program



# CO-OP EXAMPLES

**The HAWAIIAN ISLANDS**

*Explore offers now!*

## Explore, Rejuvenate and Reconnect

Take this time to *mālama* (care for) Hawai'i, its culture and communities.

**KAUA'I**

**O'AHU**

**MAUI MOLOKA'I LĀNA'I**

**ISLAND OF HAWAII'**

SCROLL DOWN FOR OFFERS

# CO-OP EXAMPLES

**READY TO  
CHOOSE AN  
ISLE SEAT?**  
The Islands await!

[BOOK NOW](#)

**Alaska**  
AIRLINES



**ALOHA AWAITS**  
Discover Hawaii with an  
unparalleled change of scenery

GO THERE WITH  
**MARRIOTT BONVOY**  
30 Hotel Brands. Endless Experiences.



**Hawaii's  
hometown  
airline**

HAWAI'I FLIES WITH US.

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**HAWAIIAN**  
AIRLINES.



Here's to new  
memories in Hawaii.

[START  
PLANNING](#)

**Hilton**



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WAIKIKI BEACH

ELEVATE YOUR STAY IN WAIKIKI  
WITH EXCLUSIVE ACCESS TO LONGBOARD CLUB

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SAVE 15% ON YOUR STAY AND PLAY!

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**AQUA-ASTON**  
HOTELS FOR ALL

[BOOK NOW >](#)



# TRADE STRATEGY

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Travel Trade

May 27, 2021



# TRAVEL TRADE STRATEGY

HVCB will continue to work closely with the trade to achieve marketing goals through:

- New content development focused on traveler types beginning with mindful travel/*Mālama Hawai'i*, followed by culture, culinary, and outdoor travel
  - Digital Guides will be downloadable content within the travel agent portal and in a format that can be shared with clients
- Updating the Hawai'i Destination Specialist (HDS) online and live workshop curriculum to incorporate new *Mālama Hawai'i* messaging
- Implementing trade media tactics to communicate *Mālama Hawai'i* messaging and drive travel advisors to the agent portal to complete their HDS Certification



## Show Your Clients How to Care for Hawaii

With fresh ocean breezes, rich cultural heritage and mouthwatering culinary traditions, your clients are bound to be inspired by Hawaii as they dream about traveling again. Invite them to learn more about the latest entry requirements and how to *malama* (care for) these truly unique islands by traveling safely.

[Learn More >](#)

## Expand your knowledge of Hawaii

- Access to specialist-only webinars
- Flexible, multitermed program to complete at your own pace
- Satisfied clients will recommend you to family and friends and boost consumer referrals
- Stand apart from other advisors with exclusive use of the Official Hawaii Destination Specialist badge

The specialist program is filled with the valuable information you need to become a true expert, benefiting both you and your clients. Earn this badge to let your clients know you're an Official Hawaii Destination Specialist.

[Get Certified >](#)



# TRAVEL TRADE STRATEGY

HVCB will continue to work closely with the trade to achieve marketing goals through:

- Execution of *Mālama Hawai'i* virtual event May 12-13 featuring travel protocols, island updates, *mālama* messaging, partner presentations, entertainment and a resource hub
  - 32 supplier participants, over 2100 registrants and 1486 unique viewers
- Conducting additional statewide and island specific virtual training events with Hawai'i partners to reach more advisors more efficiently
- Turnkey digital marketing program for travel advisors with Travel Agency Tribes (TAT) will be launched to complement HVCB's fall cooperative program with key stakeholders



# TRAVEL TRADE STRATEGY



- HVCB initiated cooperative marketing programs
  - Select wholesale partners invited to participate to drive conversion
  - Stakeholders provide special offers
  - Travel advisors with known customer base have the opportunity to close the sale
- Consortia tactics will be executed with select partners enabling HVCB to reach consumers that are known travelers and align with the Hawai'i target traveler
  - These relationships also provide access to training opportunities for large groups of qualified travel advisors
- New partnership with TA Connect allows for ongoing database updates and a CRM to target advisors based on specific criteria

# Meetings, Conventions & Incentives



May 27, 2021

# MCI STRATEGY – ENGAGEMENT

- Target MCI market segments that have highest opportunity for market recovery for Single-Property & Citywide group business
  - Medical
  - Scientific
  - High Tech
  - 3<sup>rd</sup> Party
  - Financial
  - Business Services
- Promote Mālama Hawai‘i Program as part of the Right Customer/Right Group focus
- Develop and implement program to “Shop Local” connecting local businesses to incoming MCI Groups

# MCI PROGRAMS & ACTIVITIES

- Expand strategic partnerships with organization like Corporate Event Marketing Association (CEMA) to grow corporate group business and Professional Convention Management Association (PCMA)
- Grow Meet Hawai'i's Third-Party Partnerships to extend Hawai'i MCI sales reach with targeted market segments
- Continue participation in dedicated Hawai'i section at IMEX America November 2021
- Explore the use of the GoHawaii App as platform for "Shop Local" with MCI Groups (Workshops, Ship Back Home, Must Shop, Show Your Badge)

# MCI GROUPS

## I MUA HAWAI'I VIRTUAL EVENTS April 28 – 29, 2021

"How likely are you to include Hawai'i in a future site selection" 9.8 (on scale of 1- 10)

### Highlights of Key Definites

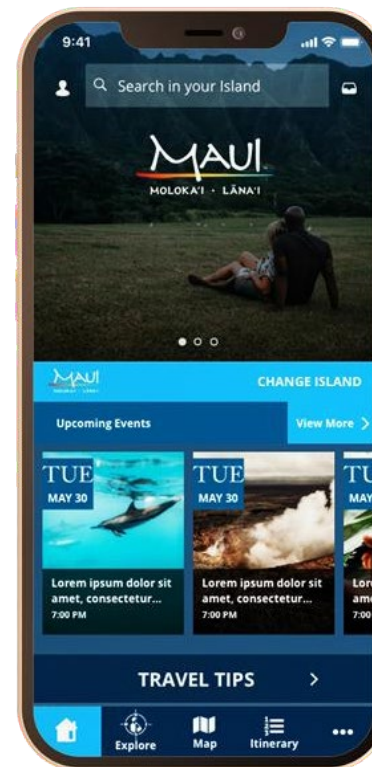
- Single Property
  - Incentive – multi-level marketing corporation, November 2022 (6,065 room nights)
  - Incentive – technology association, March 2022 (1,026 room nights)
  - Incentive – confidential group, January 2022 (951 room nights)
  - Meeting – medical association, April 2022 (694 room nights)

### Highlights of Key Tentatives

- Citywide
  - Convention – fraternal association, June 2022 (7,040 room nights)
- Single Property
  - Convention – medical corporation, February 2022 (4,765 room nights)
  - Incentive – insurance corporation, August 2021 (3,515 room nights)
  - Incentive – confidential group, November 2022 (2,400 room nights)
  - Incentive – high tech corporation, March 2022 (2,382 room nights)
  - Incentive – confidential group, February 2022 (2,100 room nights)

# GOHAWAII APP & KIOSK

- **Kuleana videos:** Educate visitors on destination values and behaviors to protect natural resources
- **Warrior marker:** Share Hawaiian culture and encourage visitation to appropriate historical and cultural sites
- **Explore section:** Connect visitors with local businesses; locally made products, shopping, dining, activities, golf, transportation, accommodations, etc.
- **Each island carousel:** Communicate pre-arrival requirements, i.e. Hanauma Bay and Wai'ānapanapa reservation systems
- **Real-time information:** Geo-fencing communications for road closures, areas not permitted for entry etc.
- **Events calendar:** Promote community events
- **Post-launch rollout:** Promote local laws on reef safe sunscreen, and more...





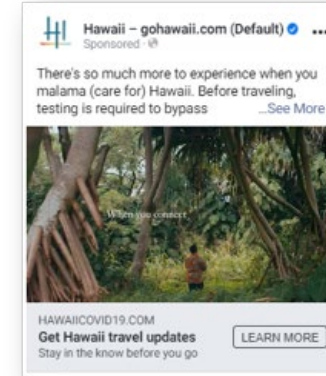
# REGENERATIVE TOURISM / DMAP INITIATIVES

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# REGENERATIVE 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.





**Mahalo**