



*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, 1 Kepakemapa 2021, 2:30 p.m.
Wednesday, September 1, 2021 at 2:30 p.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://us06web.zoom.us/webinar/register/WN_2ezeUJdkTUKGcQ1NI1SLpA

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

Papa Kumumana'o
AGENDA

1. *Ho'omaka A Pule*
Call to Order and Pule
2. *'Āpono I Ka Mo'o'ōlelo Hālāwai*
Approval of Minutes of the July 28, 2021 Marketing Standing Committee Meeting
3. *Hō'ike A Hawai'i Tourism Korea*
Presentation by Hawai'i Tourism Korea on Brand Management Plan Amendments and Updates. Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board



4. *Hō'ike A Hawai'i Tourism Canada*
Presentation by Hawai'i Tourism Canada on Brand Management Plan Amendments and Updates. Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board
5. *Hō'ike A Hawai'i Tourism Oceania*
Presentation by Hawai'i Tourism Oceania on Brand Management Plan Amendments and Updates. Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board
6. *Hō'ike A Hawai'i Tourism Japan*
Presentation by Hawai'i Tourism Japan on Brand Management Plan Amendments and Updates. Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board
7. *Hō'ike A Hawai'i Tourism USA*
Presentation by Hawai'i Tourism USA on Brand Management Plan Amendments and Updates. Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board
8. *Kūkākūkā A Ho'oulu I Nā Ka'akālai Ho'omōhala Hou****
Discuss and Develop Potential Strategies for Tourism Recovery Messaging***
9. 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.



HAWAII TOURISM AUTHORITY

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

Kono 'ia ka lehulehu e nānā mai i ka hālāwai a ho'ouana mai i ka 'ōlelo hō'ike kākau 'ia no kēlā me kēia kumuhana i helu 'ia ma ka papa kumumana 'o. Hiki ke ho'ouana mai i nā 'ōlelo hō'ike kākau 'ia ma mua o ka hālāwai iā carole@gohta.net. Inā pono ke kōkua ma muli o kekahi kīnānā, e ho'omaopopo aku iā Carole Hagihara-Loo (973-2289 a i 'ole carole@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 carole@gohta.net; Any person requiring an auxiliary aid/service or other accommodation due to a disability, please contact Carole Hagihara-Loo (973-2289 or carole@gohta.net) no later than 3 days prior to the meeting so arrangements can be made.

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Approval of Minutes of the
July 28, 2021 Marketing Standing Committee Meeting



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**REGULAR MARKETING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY
Wednesday, July 28, 2021 at 2:00 p.m.
In-Person and Virtual Meeting
Hawai'i Convention Center
1801 Kalākaua Avenue, Honolulu, Hawai'i 96815**

MINUTES OF MARKETING STANDING COMMITTEE MEETING

COMMITTEE MEMBERS PRESENT:

Daniel Chun (Chair), George Kam, Fred Atkins, Kyoko Kimura, and Sherry Menor-McNamara, Benjamin Rafter

COMMITTEE MEMBER ABSENT:

HTA STAFF PRESENT:

Kalani Ka'anā'anā, Keith Regan, Marc Togashi, Jennifer Chun, Caroline Anderson, Maka Casson-Fisher, Carole Hagihara-Loo, Laci Goshi, Jadie Goo, Ronald Rodriguez, Ariana Kwan

GUESTS:

Jay Talwar, John Reyes, John Monahan, Eric Takahata, Mitsue Varley, David Baronfeld, Barbara Okamoto, Kara Imai, Jeff Eslinger, Nathan Kam

LEGAL COUNSEL:

Gregg Kinkley

1. Call to Order and Pule:

Chair Daniel Chun called the meeting to order at 2:07 pm. Maka Casson-Fisher opened the meeting with a pule.

2. Presentation by HVCB including updates on market insights, airlift, vaccination exception outreach, Mālama Hawai'i and other programs for the balance of 2021

Chair Chun recognized John Reyes, Jay Talwar and John Monahan to provide an update. Mr. Talwar reported that there's an increasing monthly growth in scheduled U.S. non-stop seats from June to August compared to the same months in 2019. He noted that the month of September and October is also seeing growth. He added that the combined worldwide non-stop seat to Hawai'i is down to 5% in July and 2% in August compared to that of 2019. He

said that September through November shows seats on the schedule but there's a lot of time to adjust it based on what's happening to the world and travelling, in particular. Mr. Talwar said that the total US visits rose steeply during the Spring break which is a very quick recovery from 2020 with zero visitors and climbing above 2019 benchmark. He noted that globally, it's below the 2019 mark but heading to that direction through June.

John Monahan reported that hotel performance for June in terms of occupancy is slightly decreased compared to 2019 but with solid growth in ADR and in RevPar, particularly for the luxury class. Mr. Monahan noted that the average daily rate in Wailea is approaching \$800 per night and that the vacation rentals' occupancy is recovering quicker than the hotels but their ADR is down. Mr. Talwar reported that room nights on the books is solid in growth until June 27 but the demand started to shrink as of July 4th and softening through July 11th. He noted that this is an area of concern as incredible growth was seen but it could have been a bubble. He expressed concern with the impact of this year's visitation to next year in regards to the U.S market's experience with the surge in travel and lack of service workers. He noted that the word-of-mouth is the best form of marketing and that they will ensure that it's maintained in a positive way. He reported that U.S. travel concerns has been going downhill but has popped back up with 51% saying that the Delta variant makes them less interested in traveling. He added that nationally, people are not as comfortable as they have been with having travelers come to their community.

John Reyes reported that they have started off with a good MCI pace but like a marathon, the last couple of miles become important. He noted that the stakeholders' sentiment is to vocalize that Hawai'i is open for group meetings just like what Arizona and California is doing with their national campaigns. He added that HVCB will be focusing on this. He noted that they are seeing tremendous inquiry and bookings for MCI in Q4 of 2021 and Q1 and Q2 of 2022 with softening in Q3 and Q4 of 2022. He added that the MCI customer concerns are similar to the travelers' concerns: changing government mandates related to COVID, liability and risk in booking future meetings and industry staffing issues/loss of hotel sales contact. He added that they're constantly updating their meeting planners of what's happening on each of the islands and where HTA can start coming into play as a destination expert for them where they can promote and sell Hawai'i.

Jay Talwar reported the Mālama Hawai'i Program is seeing more and more partners are coming and asking how they can participate in the volunteer programs and in a few lodging partners as well. He noted that the Mālama Hawai'i messaging is communicated mindful travelers pre-booking, through their booking and arrival to Hawai'i and then starts to transition to Kuleana messaging once they are in the communities. He shared one of the 10 videos that they've been working with Condé Nast Traveler as part of the targeting and messaging. He added that the airlines are stepping up to share these stories in social media

and that the program has been embedded in different editorial formats such as SFGate, Houston Chronicle, as well as locally. He noted that Skift, a highly influential tourism industry virtual publication expressed their kudos for HTA with how the Mālama Hawai'i was launched which is the way that it should be done. He noted that this has been picked up by Prevue, Travel Press and Travel Weekly. He added that their team also worked with industry partners in promoting the Mālama Hawai'i Program. He noted that all of these videos are available in www.youtube.com/gohawaii.

John Reyes reported that Corporate Social Responsibility (CSR) programs for both corporate and association groups have always gone hand in hand with programs. He noted that their Meet Hawai'i team is ensuring that they are not communicating not only the program but also the emotion and respect for Hawai'i and ensuring that groups give back. He added that Teri Orton and her team has done a great job with sponsoring the reforestation of Hawai'i with Plant a Tree program that they are communicating and educating to city-wide customers who are coming. He reported that HVCB is actively involved in business development through attendance at premier industry trade events, which are face-to-face. He noted that they are working with HVCB membership on the "Made in Hawai'i" retail program and will get back with specifics through the Go Hawai'i app as well as specific partnerships they wanted to implement. He said that they are actively collaborating with O'ahu hotel partners on a unified citywide message and strategy focused on future bookings for 2021 and beyond. He said that they are excited in developing corporate business in terms of industry trade events by attending the Corporate Event Marketing Association (CEMA), Maritz Global, Connect 2021 and IMEX America 2021.

Jay Talwar reported that they've sent out vaccination exception outreach messages to all their constituents and have been heavily involved in communicating to the media, airlines and industry partners what's happening through the Safe Travels program. He noted that initially it involved following up with people who are quarantined then the COVID testing and now, the vaccination exception program. He said that travel-related instances of COVID spread are vastly from residents returning without a test and opting to quarantine. Mr. Reyes reported that they've been in strong communication regarding the MCI vaccination exception and have also used FB, Instagram and Twitter in getting the messaging out.

Mr. Monahan reported that their expected number of 8,000 visitors with the Safe Travels in October 2020 exceeded to an average of 30,000 visitors a day and close to 4.5 million people that came to Hawai'i paying for a test. He noted that the support team for the Safe Travels program handled 225,000+ calls and 105,000+ emails and has been instrumental in helping visitors with the issues and problems they encounter.

Ms. Kimura asked about the travel demand. Mr. Talwar responded that with the data on

hand, it's starting to soften at the end of August to the October period. He noted that December looks good with the holiday season but is concerned with the start of Year 2022. Mr. Reyes said that the huge pent-up demand is starting to mitigate as other destinations are opening up along with a number of other factors.

Mr. Atkins asked about the mechanism to see how the Mālama messaging is penetrating visitors. Mr. Reyes responded that it can be done through research but it's not within the budget. He added that they spoke with participating partners who are measuring it by the number of people selecting the Mālama Hawai'i program and the numbers has been super positive.

Mr. Atkins asked about Maritz Global. Mr. Talwar responded that Maritz Global is expanding beyond their typical incentive program and wants to go full MCI. He added that HVCB is excited to be at this conference to talk about Hawai'i being able to do all these things.

Ms. Menor-McNamara asked about the profile of the MCI bookings. Mr. Reyes responded that Q1 and Q2 of 2022 bookings are re-bookings or meetings they had in 2021. He said that Q3 and Q4 are new opportunities for HVCB and that they are continuing to find new business.

Mr. Regan read a question from the public asking the domestic airlines where the Mālama Hawai'i videos are playing on. Mr. Talwar responded that there are six domestic airlines coming in to the destination and have been sharing Safe Travels information and Mālama Hawai'i messaging.

Mr. Chun asked about the Made in Hawai'i program. Mr. Talwar said that they will be sharing more content starting this fall about unique products that can be purchased in Hawai'i. Mr. Reyes said that for MCI, it will involve evaluation of membership with the Go Hawai'i app and strategic partnerships in platforms that can give HVCB reach into the community. He noted that what other destinations see as most important is doing a made in something program and has turned over. He added that more education and training is needed thus HVCB needs to market it to the meeting planner and are ironing out a membership for the retailer who's not as familiar with the MCI format.

Ms. Menor-McNamara asked about B2B opportunities for the Hawai'i products. Mr. Ka'anā'anā responded that their work is still ongoing with DBED and other partner organizations to make sure that they're doing it in a holistic way.

Mr. Ka'anā'anā flagged that even though the travel wave softens, it's still a high margin of people wanting to travel and that they need to be aware of. He also asked if Mr. Talwar could follow up on earned vs. paid ads and how much they're getting from each. He added

that Condé Nast Traveler is a paid partnership so it's not earned. He said that he's concerned on what's being done about HTA's owned platforms in strengthening it in giving safe travels and expectations.

3. Presentation of the 2021 Brand Presentation by HTJ including updates on market insights, airlift, vaccination progress, Mālama Hawai'i and other programs for the balance of 2021

Chair Chun recognized Eric Takahata of HTJ to provide an update. Mr. Takahata presented a video of Ms. Carissa Moore, Hawai'i's gold medalist in surfing, endorsing Hawai'i. Mr. Takahata reported that Japan is looking to reopen in Q4 this year noting that the vaccination has crossed 20% in the past few days and are looking to have herd immunity by October. He added that Tokyo and Okinawa are under a state of emergency which will both end in August 22. He said that the government will start accepting applications for vaccination certificates from July 26 for people to travel internationally to Italy, Korea, Austria, Turkey, Bulgaria, Poland and Estonia where the exemption from the 14-day quarantine upon return is still under discussion. He noted that HTJ is working with the Japanese government about the possibilities of vaccine passports with Hawai'i and in setting up travel corridor as being tried to set up last year. Mr. Takahata said that there's still the 14-day quarantine and a negative RT-PCR test result are still required for all entry to Japan.

Mr. Takahata reported that the Tourism recovery is seen by JATA in three broad areas, namely vaccination situation, event, and international travel. He said that heading to Q4, the majority of their population would be vaccinated and able to travel. He added that for events, the Olympics & Paralympics are ongoing and there'll be a House of Representatives election, Honolulu Marathon and Beijing Olympics. He added that they already have 3,000 registered runners from Japan for the December Honolulu Marathon but the February Beijing Olympics will somewhat affect travel out of Japan. He said that the international travel industry is looking to open at least the business track sometime soon and to restart leisure travel in Q4. He added that the Japanese is working on reducing the alert level of the travel advisory to the U.S. and the relaxation/exemption of the 14-day quarantine from Hawai'i. Mr. Takahata reported that the airlines are looking at increasing capacity for Q4 and are investing to getting back to business to Hawai'i with Haneda flights operating with first-class sitting and a Face Express system database which is tied in with like IATA's vaccination database. He said that ZipAir will be flying back to Hawai'i again and ANA has the 10,000 mile campaign for passengers traveling between Japan and Honolulu. He noted that Skyscanner and Infiniti report a high pent-up demand for Hawai'i, specifically Honolulu to be the number one most searched destinations by the Japanese.

Eric Takahata reported that HTJ's recovery preparation is broken down into three major ideas which are mainly to remove as many travel roadblocks. He noted that they're working with the Japanese government and Ministry of Health to increase the number of TTPs to help lower the cost for the PCR test for Hawai'i travels. He added that work with the vaccine passport program and the Mālama Hawai'i campaign through education will continue for Q3 and Q4. He said that the Japan market is picking up on the messaging with John De Fries in morning shows in Japan talking about regenerative tourism through the Mālama mindset. He added that they are collaborating with Hilton Grand Vacations in doing Mālama events for their ownership and that JCB Credit Cards will also help in messaging throughout their network consisting of 70% of Japan's population. He said that they will be showing the Moananuiākea movie in 25 cities in collaboration with PVS with tickets all sold out last year. Mr. Takahata said that they will be focusing on edu-tourism, small groups and CSR for MCI targeting Q1 and Q2 next year but are having bookings for Q4 already. He said that HTJ is taking almost a 360 degree approach towards destination management with their work in collaborating with industries in both Japan and Hawai'i.

Ms. Kimura suggested holding promotions for next year with the 14-day quarantine still in place. Mr. Takahata responded that all signs seen in the industry and with the Hawai'i Consul General and Japanese government saying that the quarantine requirement is seen to relax in Q4, they wanted to be ready when the business starts moving, noting that they're still on the fixed costs until November. Ms. Varley added that pre-education is really important that sending the message out now is really important, more so with the hotels and airlines already having their media plans in place.

Ms. Kimura asked about the obstacles of the travel corridor that's been worked on. Mr. Takahata responded that the Travel corridor talk has been derailed due to the pandemic taking the turn for the worse.

Mr. Rafter asked about the vaccine passport, herd immunity and coops. Mr. Takahata responded that the Japanese traveler can enter the U.S. with some kind of test but only in Hawai'i that it's specified as RT-PCR. He noted that they're looking at the vaccine passport to be set up with Japan through a state level. He added that personally, he's doubtful that 80% of the Japanese population is achievable by October but it's what the Japanese government says. Mr. Takahata said that they will submit the application and related data pertaining to coops and HTA will be the one to decide on it.

Mr. Atkins asked about the reciprocity of the vaccination passport to Hawai'i visitors with Japan opening up and the focus of their budget. Mr. Takahata responded that it is the goal to be able to travel to Japan under the same conditions. Ms. Varley said that they're

planning to put the budget to the Mālama Hawai'i education and the industry partners in finding efficient ways to do the Mālama campaign altogether with the airlines and wholesalers. She added that JATA and Japan travel associations are talking about the top leaders to come to Hawai'i for the site inspection tours in Q4 around the Honolulu Marathon time. She said that the coops will be from the proposals of airlines and wholesalers which will come later and HTJ will work together with them.

Mr. Regan read Chair Wakai's thoughts about waiting for the Japanese government to end quarantine rather than chasing rainbows with the travel quarter and bubble tourism talks always failing. Mr. Takahata said that they're looking at it as chasing possibilities and that there's value in working with the Japanese government and travel industry to get to the goals as quick as they can.

Ms. Kimura asked for clarifications about the budget for Japan. Mr. Ka'anā'anā responded that there are two contracts with one ending in December 31, 2021 with the fixed price they're on now and a second contract for calendar 2022 which is funded from the 2021 budget. Ms. Kimura further asked if this year's budget allocation can be changed within the contractor from branding to natural resource or others. Mr. Ka'anā'anā confirmed that it is possible.

4. 2021-2022 Major Market Area Contract Updates

Chair Chun recognized Kalani Ka'anā'anā to provide an update. Mr. Ka'anā'anā reported about the list of active 2021 MMA contracts showing most contracts ended. He also showed the list of 2022 MMA contracts that are DAGS approved and encumbered with the exception of U.S. MMA which is not in the list.

5. RFP Planning Updates: United States Major Market Area, Global Meetings Conventions & Incentives, and Global Support Services.

Mr. Ka'anā'anā provided an update of staff's planning for 3 RFPs which are United States major market area, Global MCI and Global Support Services. He added that in order to have the competitive bid open for a window of 10 weeks, they have to release the RFPs by the first week of August to make sure that it's compliant and meets the deadline. He noted that these will be funded via ARPA.

Mr. Atkins asked if he feels that they need to put some more RFPs and to have something in there as a protection. Mr. Ka'anā'anā responded that they won't issue until the CSFRF is approved. He added that they will submit the CSFRF which is the form that they request the funding and then the allocation would come to HTA, after which they could issue the RFP

properly and not prior to it as it would be out of order. Mr. Togashi noted of the uncertainty of ARPA's future funding as its funding is only for the next year. He added that they have it in the RFP contracts that it's subject to the availability of funding to address the protection that Mr. Atkins mentioned. Mr. Regan noted that he felt confident that their request will flow through budget and finance.

Mr. Chun asked where the actual recommendation to the Board meeting will come from. Mr. Ka'anā'anā responded that HTA staff will make the recommendation to the Board and if approved, they will submit the CSFRF where they will go with the RFP if it gets signed and approved.

Ms. Menor-McNamara asked if they are incorporating management of tourism into the RFPs since this is a priority. Mr. Ka'anā'anā responded that everything they're working on is based on the Board's recommendation with the change management plan and in alignment with their strategic plan and DMAPs.

Mr. Regan asked whether or not the marketing savings can be used to support the other three pillars. He noted that the challenge of reducing the HTJ contract for 2021 which is a TAT contract is that the funds will no longer be available to HTA as the TSF has been eliminated and they can't reprogram it to something else.

Mr. Regan asked a public comment addressed to Mr. Ka'anā'anā how the 2022 amounts were selected by MMA, specifically why China's amount is so high. Mr. Ka'anā'anā responded that those amounts were based on prior budget amounts from the Fiscal 2020 budget.

6. 2022 Brand Marketing Plan Updates

Mr. Ka'anā'anā reported that the staff is ensuring that their 2022 objective is to add emphasis on visitor and industry education for responsible travel and Mālama Hawai'i and to keep their performance measures up-to-date to align with HTA's change management plan. He added that the BMPs will coincide timing-wise with the RFPs. He concluded that they will take all of the GMT's BMPs and roll them up into one big plan. He added that their pivot will be reflected in the BMPs and RFPs.

7. Calendar Year 2021 Budget vs. Actuals

Mr. Ka'anā'anā presented the list of 2021 MMA budget vs. actuals. He noted that Japan with a \$4.5 million budget has a contract balance of over \$3.46 million under a fixed cost agreement. He added that anything in excess of the base fixed costs will come through a written process of formal application in order for funds to be released.

Mr. Chun asked at the threshold to which the written process will come to the marketing committee. Mr. Ka'anā'anā responded that he intended that it go through staff then leadership will make a determination and would be happy to have the conversation with the committee at what level they wanted to come in. Mr. Chun said that it would be beneficial for the committee to look through what it would look like to have at least visibility to it as the budget can't be rolled over.

Mr. Regan noted that they've been working with the State Procurement Office about time extension for some of the contracts and would have to ask them if it's acceptable or not. He added that they have just completed their internal training process allowing them to have the delegation of procurement authority and are waiting for it to be granted by DBEDT. He assured that they will have the answer by next month's marketing meeting.

Mr. Atkins said that it would be great to see what the market is thinking of in terms of budget and how realistic for them to use the money to see as oversight but not as micromanagers. Mr. Ka'anā'anā responded that they can bring back the amended brand management plan as the adjustments are made. He presented the slides where the markets are targeted for restart with Japan in November, Canada in August and Oceania in November. He added that the U.S. and Korea have already started their activities.

8. Planning for Fall (September) and Spring (March) Tourism Updates

Mr. Ka'anā'anā reported that the HTA staff will get back to their rhythm in doing fall and spring marketing updates. He added that though the RFPs and BMPs won't be ready by September, they will still have September update to be able to provide the market insights and current conditions and existing plans for community awareness on HTA's work. He added that they will have another meeting in March.

Chair Chun asked for public testimonies and there was none.

9. Adjournment:

The meeting adjourned at 4:18 p.m.

Respectfully submitted,



Sheillane P. Reyes
Recorder

3

Presentation by *Hawai'i Tourism Korea* on Brand Management Plan Amendments and Updates.
Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board.



2021 BMP UPDATE

HTA MARKETING STANDING COMMITTEE MEETING 9.1.2021

Irene Lee

Korea Country Manager of Hawai'i Tourism Korea

MARKET SITUATION

MARKET SITUATION 1

Korea General Economy

- Forecasted Korean economic growth in 2021: 4.3% (recorded 3.9% growth in the first half)
- Currency exchange: USD 1 = KRW 1,173.50 (as of August 27; appreciated vs. LY)
- Korea's exports in July surged 30% to \$55.4 billion on-year, the highest figure in history

Korea COVID-19 cases (as of August 27, 2021)

- Total number of confirmed cases: 243,317
- Average no. of new daily confirmed cases past 1 week: 1,787
- Total number of vaccination: 1st shot - 27,727,639 (54%) / 2nd shot - 13,780,926 (27%)
- The government extended the Level 4 guidelines in Seoul metropolitan area until September 22 under which private gatherings of three or more people are banned after 6 p.m. in order to prevent the spread of variant virus.

MARKET SITUATION 2

Korea vaccination timeline

- Free vaccination to all citizens targeting reaching herd Immunity by November:
 - ✓ 70% of the total population will be vaccinated with at least first shot by September
 - ✓ Approximately 32 million people will be fully vaccinated and able to travel abroad from November

Travel Restrictions

- **Special travel advisory** for Koreans to avoid non-essential overseas trips **till September 13**
- **PCR negative test result mandatory for all arrivals:** from July 15, Korea requires a PCR negative test result taken in 72 hours prior to boarding regardless of nationality and vaccination status
- **Exemption from 14-day quarantine:** those who have been fully vaccinated in Korea 2 weeks prior to departure are exempted from the mandatory 14-day quarantine if tested negative and must undergo additional 2 PCR tests after arrival

MARKET SITUATION 3

Outbound market condition

- International flight operations in June: 43% increase YoY
- Passenger traffic in June: 35.5% increase YoY
- Number of Korean travelers to Hawai'i in first half of 2021: 2,429 pax (compared to 506 pax from the second half of 2020)
- Airlines are preparing to resume key international routes and sales & content marketing for overseas travel is resuming following the gradual travel demand recovery

Air seat synopsis

	Aug to Oct 2021	Nov 2021	Dec 2021	# of Seats Aircraft
Hawaiian Airlines (HA460)	3 flights/w	3 flights/w	3 flights/w	277 seats (A330)
Korean Air (KE053)	-	3 flights /w	5 flights /w	276 seats (A330) 368 seats (B747)
Asiana Airlines (OZ232)	-	3 flights/w	3 flights/w	311 seats (A350)

MARKET SITUATION 4

General Travel Sentiment

- Honeymooners are starting to make actual booking to destinations where quarantine is exempted such as Hawai'i and the Maldives departing this year
- Travel influencers are actively uploading new contents traveling to as far as Europe and U.S.

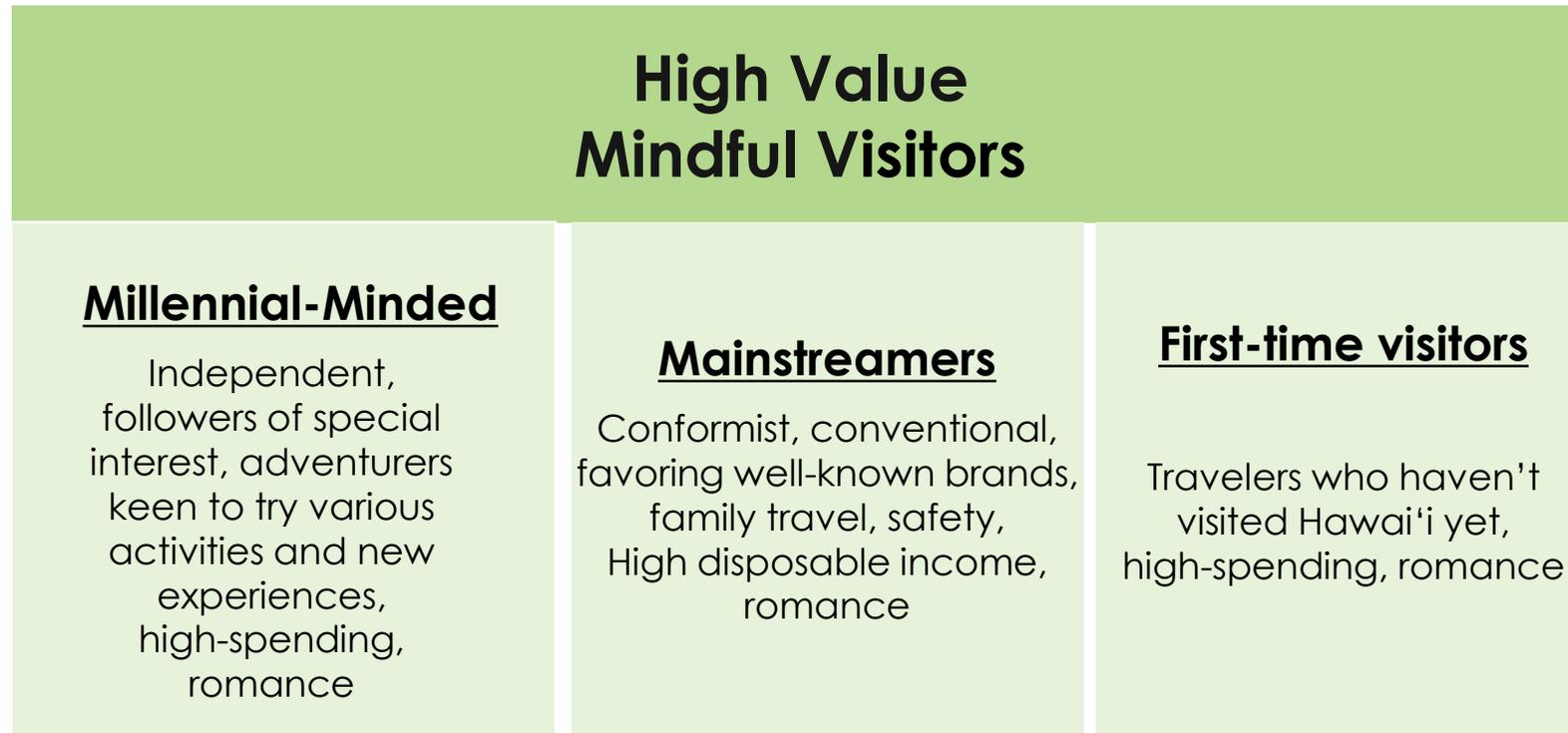
Competitive destinations

- **France** is allowing Korean travelers with PCR negative test result issued within 72 hours of departure. For fully vaccinated visitors, test result is not necessary.
- **Australia** launched its B2B online platform, Australia 365 On Demand, for industry partners for training and sharing information.

TARGET AUDIENCE

TARGET AUDIENCE

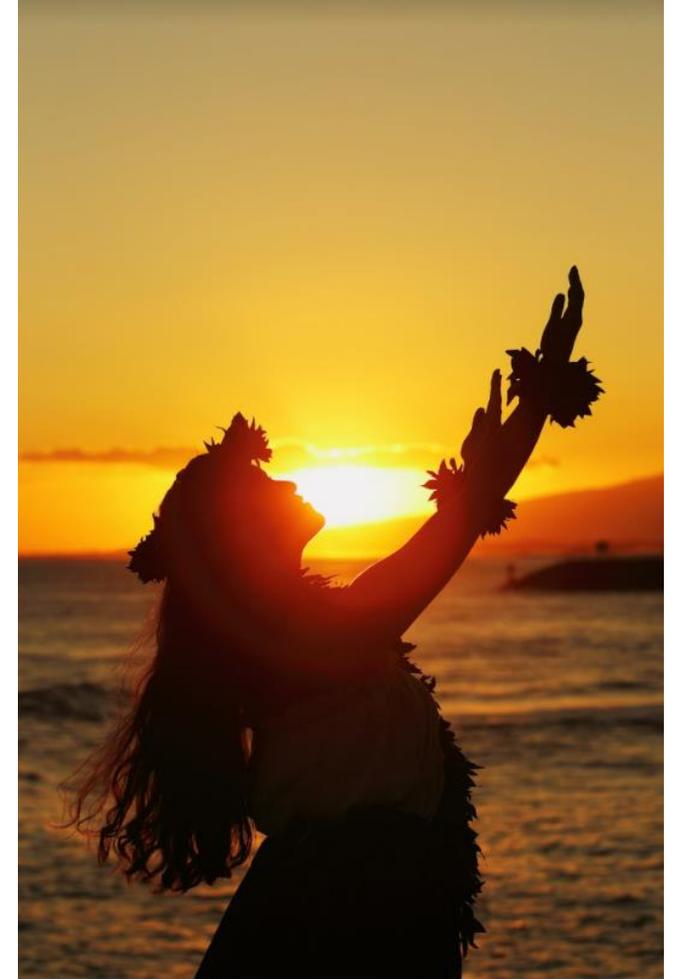
- Hawai'i Tourism Korea will target **high value mindful visitors** under the COVID-19 recovery stage along with four key strategic pillars
- Key geographic Area: Seoul and Busan



RECOVERY STRAGETY

CORE BRANDING MESSAGE

- Intensively implement Mālama Hawai'i message to both B2B and B2C market
- Promote Hawai'i as a sustainable destination to visit after October after getting vaccination



KEY RECOVERY STRATEGY

- ✓ Incorporate Mālama Hawai'i in all activities and utilize HTA assets in Korean market
- ✓ Deliver Hawai'i's 4 strategic pillars to Korean consumers
- ✓ Refresh the images of Hawai'i as a sustainable and clean destination
- ✓ Inspire the Korean travelers to Hawai'i and drive business to local communities
- ✓ Revitalize the market demand at the appropriate time with industry partners

KEY CAMPAIGNS/PROGRAMS

KEY CONSUMER PROGRAM 1

#StoriesofAloha Social Campaign (Influencer program)

- **Target:** FIT Travelers
- **Objective:** activate social media promotion to educate consumers on Mālama Hawai'i and also to remind of the Hawaiian Islands as the ideal travel destination for post COVID-19 era
- **Components:**
 - generate social buzz in partnership with sustainable consumer brands and influencers
 - inspire Korean travelers with Mini Aloha Report involving an influential correspondent living in the Hawaiian Islands
- **Timeline:** Q3 and Q4
- **Projected outcome:** social media value of \$1.2M (increase in the number of IG followers and engagement)
- **Budget:** \$30,000



KEY CONSUMER PROGRAM 2

Digital Recovery Consumer Co-op Campaign with Naver Travel+ (Digital marketing program)

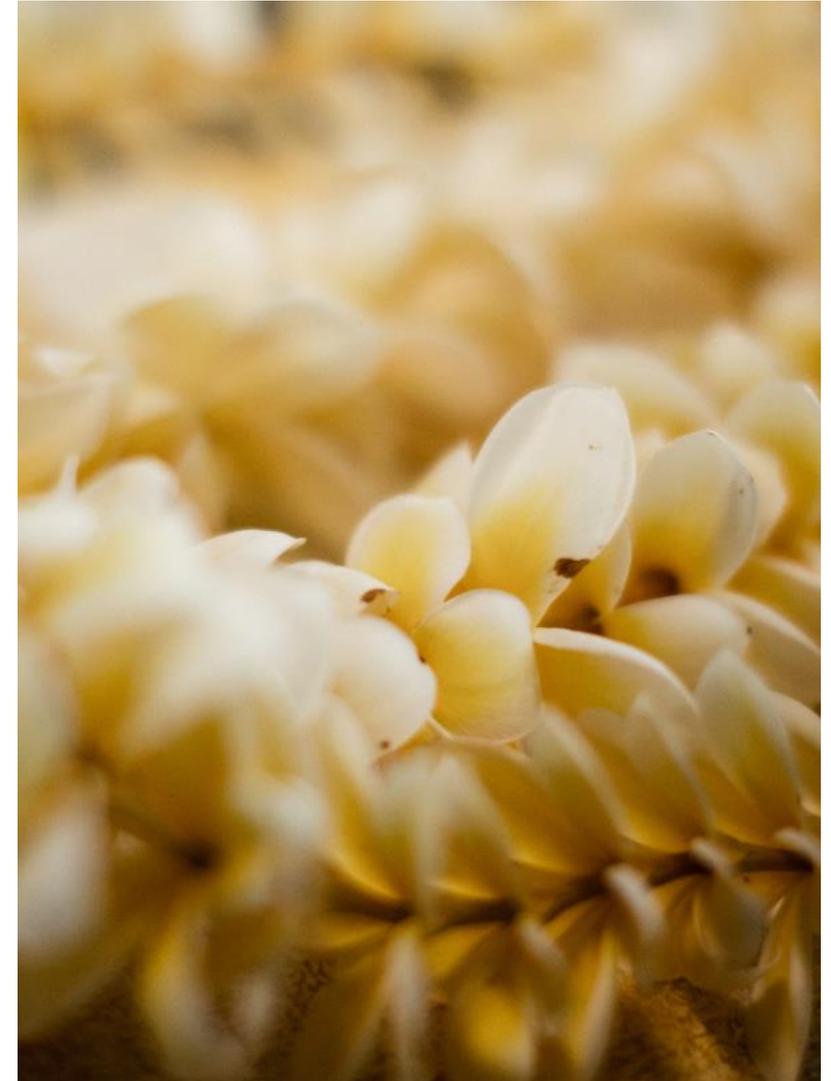
- **Target:** Potential travelers
- **Objective:** to publish series of Hawai'i content to educate consumers on Mālama Hawai'i
- **Components:** publish series of posts which embracing the theme of HTA's 4 strategic pillars and Mālama Hawai'i message
- **Timeline:** September to December
- **Projected outcome:** PR Value of \$600,000
- **Budget:** \$9,000



KEY TRADE PROGRAM 1

Travel trade education program

- **Target:** industry partners especially key travel agents
- **Objective:** execute an educational program designed to foster Korean travel agents who can better represent the authentic kuleana and Mālama Hawai'i
- **Components:** conduct a series of webinars in quarterly basis
- **Timeline:** September, December
- **Projected outcome:** 20 travel agencies to complete the program of the year
- **Budget:** \$10,000



KEY TRADE PROGRAM 2

Airline co-op

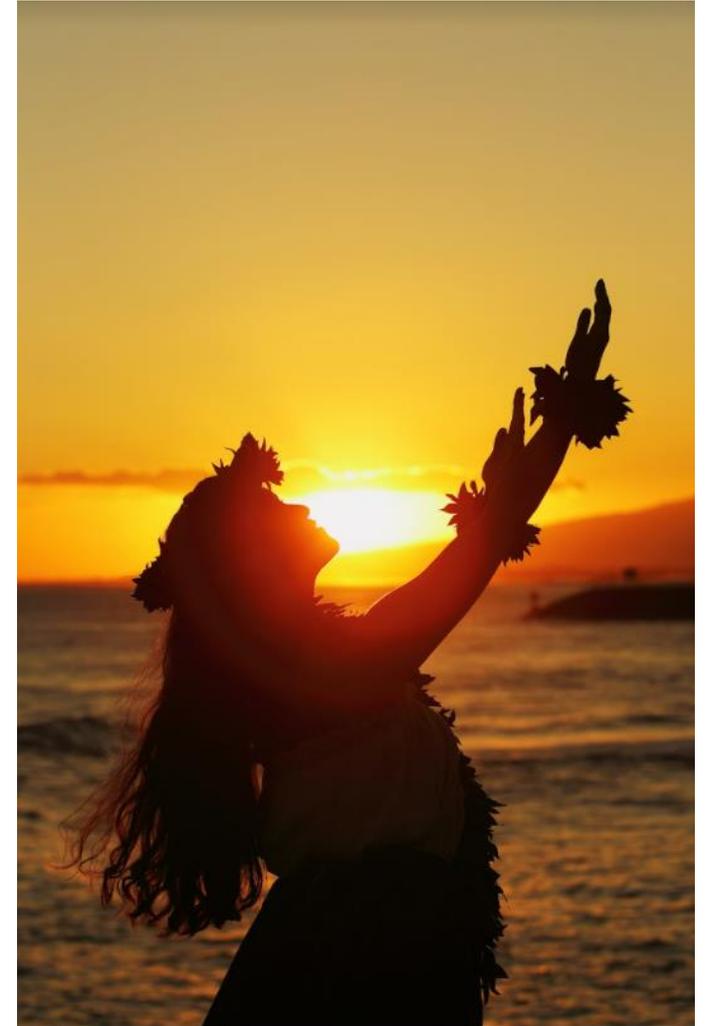
- **Target:** FIT / PKG consumers
- **Objective:**
 - deliver Mālama Hawai'i message to its consumers
 - boost ticket sales of ICN-HNL route in partnership with HA, KE and OZ
- **Components:** develop tailored consumer or sales promotion that fits each airlines target market
- **Timeline:** November & December
- **Projected outcome:** increase ticket sales of ICN-HNL route of respective airlines
- **Budget:** \$37,500



KEY TRADE PROGRAM 3

Regenerative tourism co-op promotion with major wholesalers and OTA

- **Target:** FIT / PKG consumers
- **Objective:** to position Hawai'i as a top of the mind destination for post pandemic period
- **Program components:**
 - inspire potential travelers to visit Hawaiian Islands delivering the message of Mālama Hawai'i
 - encourage major travel agencies to develop and sell Hawai'i tour products
- **Expected partners:** Key wholesalers and OTAs
- **Timeline:** November & December
- **Projected outcome:** develop Hawai'i FIT & PKG tour products
- **Budget:** \$33,500



KEY MCI PROGRAM 4

Meet Hawai'i 'Ohana Meeting

- **Target:** incentive groups
- **Objective:** to implement Mālama Hawai'i concept to major MCI partners and to position the Hawaiian Islands as the ideal travel destination for MCI business in post pandemic period
- **Components:** arrange sales meetings with key MCI partners including MCI specialized travel agencies and major corporates
- **Projected outcome:** meeting with minimum 15 partners
- **Timeline:** December
- **Budget:** \$2,500



PROPOSED BUDGET

PROPOSED BUDGET JULY – DECEMBER

	Annual Budget	Jan-Jun Actual	Bal for Jul-Dec	Jul	Aug	Sept	Oct	Nov	Dec
Fixed Costs	118,500	59,250	59,250	9,875	9,875	9,875	9,875	9,875	9,875
Program Budget	181,500	3,000	178,500	18,000	9,000	11,000	9,000	75,000	56,500
Total	300,000	61,845	238,155	27,875	18,875	20,875	18,875	84,875	66,375

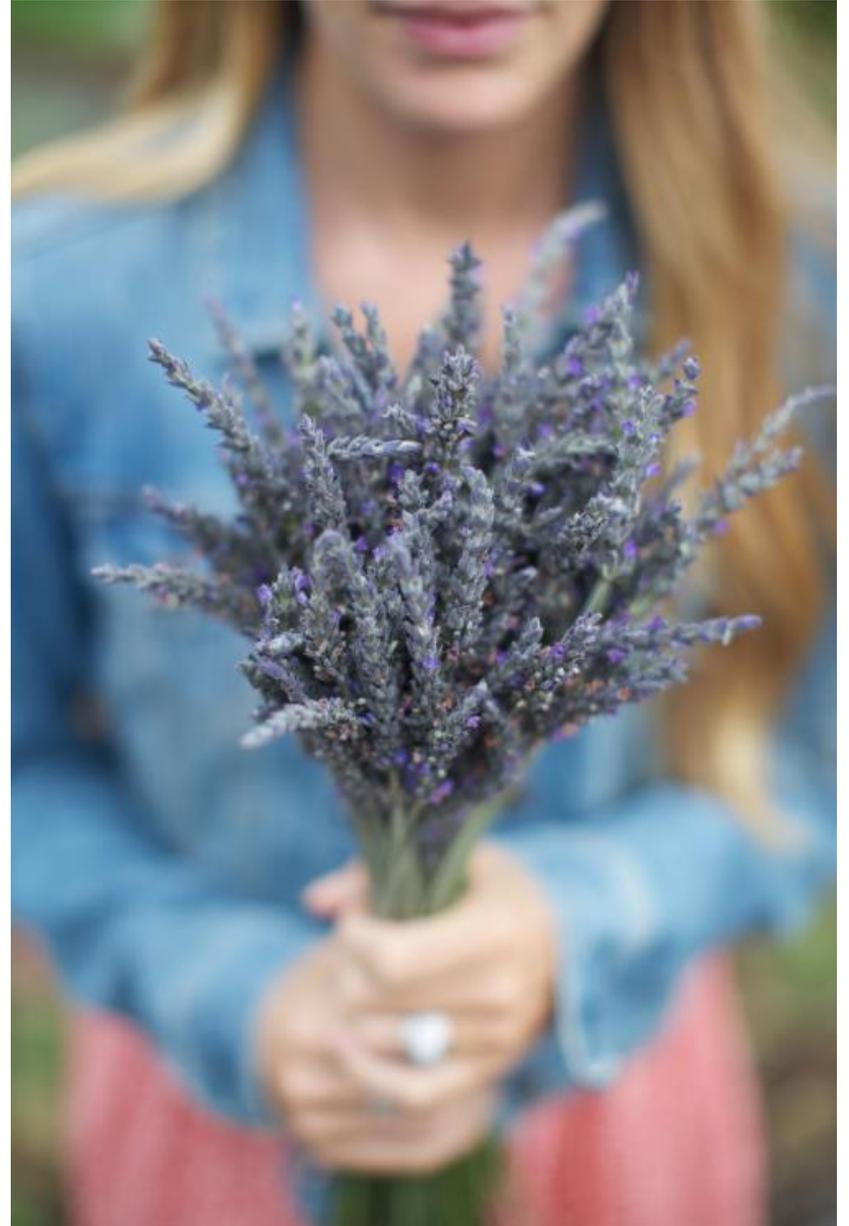
PERFORMANCE MEASURES

UPDATED PERFORMANCE MEASURES

Category	Sub-category	Annual Target		Semi-Annual Target			
		2021		Jan - Jun		Jul - Dec	
		Updated	Previous	Updated	Previous	Updated	Previous
PR	Publicity Value	2,260,000	2,040,000	510,000	510,000	1,750,000	1,530,000
	Media FAM	1	-	-	-	1	-
Trade	Trade FAM	1	1			1	1
	Edu Sessions	5	5	2	2	3	3
Social Media	Impressions	40,635	37,800	18,900	18,900	21,735	18,900
	Fan Count	21,447	18,447	17,647	17,647	21,447	18,447
MCI	Edu Sessions	2	2		1	2	1
	Room Nights	-	400	-		-	400

MAHALO NUI LOA!

KAMSA-HAMIDA!



4

Presentation by *Hawai'i Tourism Canada* on Brand Management Plan Amendments and Updates.
Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board.



CANADA

2021 BMP UPDATE

HTA MARKETING STANDING COMMITTEE MEETING

9.1.2021

Lorenzo Campos
Account Director

MARKET SITUATION



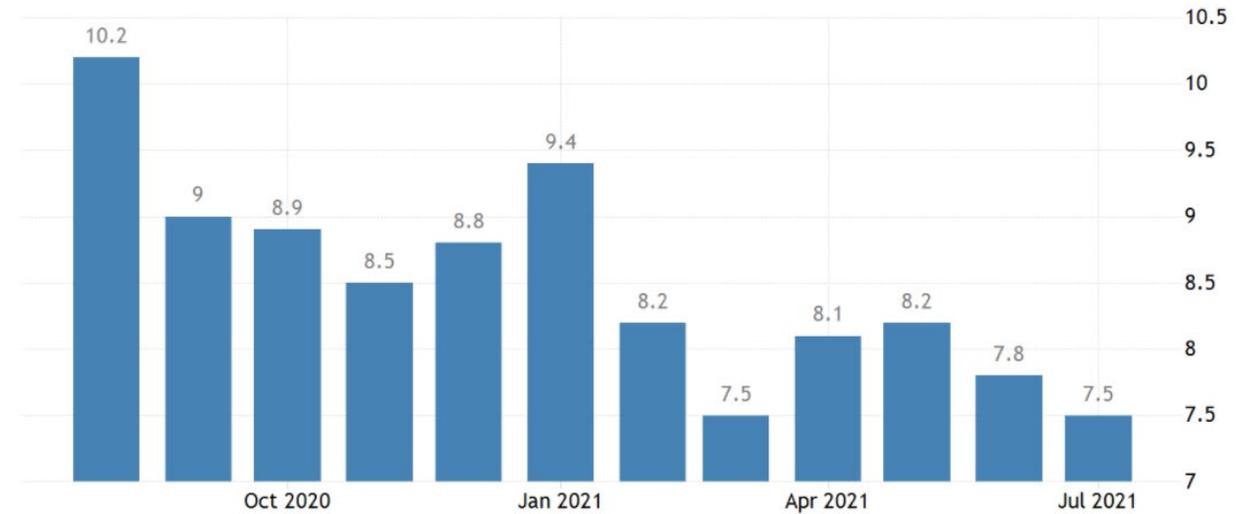
ECONOMIC OVERVIEW

- Canadian federal government's fiscal response +C\$435 billion or 19.7% of GDP
- Wage subsidy program extended to November 2021
- Canadian dollar strong around USD\$0.79

- Consumer confidence back to pre-pandemic levels
- The Bank of Canada's interest rate 0.25%

FEDERAL ELECTION SEPTEMBER 30th

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



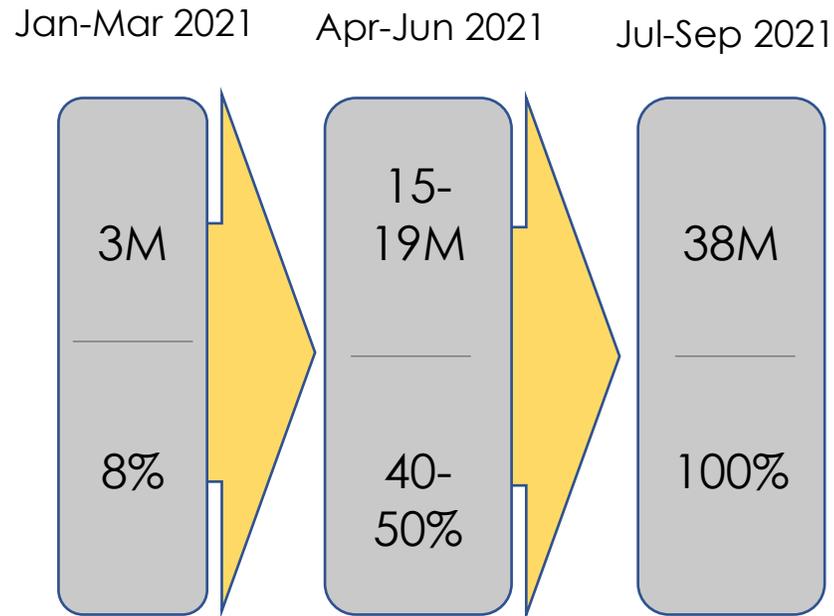
SOURCE: TRADINGECONOMICS.COM | STATISTICS CANADA

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

- 52M (82%) doses of COVID-19 vaccines (Moderna, Pfizer-BioNTech, Astra-Seneca)*
- September 2021 target (100%)
- 19,170 active cases currently*
- Fewer travel restrictions
 - No quarantine for double vaxxed
 - PCR test

AIRLIFT



165.5K seats for the Winter 2021/2022

- **Resumes September:**
 - YVR-HNL
 - YVR-OGG
- **Resumes December:**
 - YVR-KOA
 - YYZ-HNL
 - YYC-OGG
- **New routes: NON STOP FLIGHTS**
 - YYC-HNL
 - YYZ-OGG
 - YUL-HNL (Montreal)



- Planning month by month
- Stopped the service to Hawai'i on May 2
- Flight restart September

MARKET CONDITIONS

TRAVEL SENTIMENT

- Pent-up demand
- Flexibility in booking required
- Safety & health protocols (BUSA)
- Intentions (YouGov)
 - Friends & Family
 - Multi-generational
 - Beach Trip
 - Hike/walk holiday in countryside

COMPETING DESTINATIONS' ACTIVITY

- Jamaica: trade training webinars, consumer advertising (TV, social, POP), trade events, fams
- Cayman Islands: paid social and training webinars
- Visit Florida: training webinars, virtual events,
- Mexico: disengaged promotion from different destinations and hotel chains

TARGET AUDIENCE



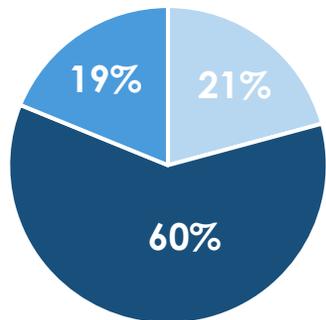
TARGET AUDIENCE

Priority Markets:

1. **British Columbia**
2. **Alberta**
3. **Ontario**
4. **Québec**
5. **Rest of Canada**



■ 18-34 ■ 35-64 ■ 65+



Source: Numeris RTS Canada Spring '19

RECOVERY STRATEGY



CORE BRANDING MESSAGE

Branding

Hawaiian Culture

Natural Resources

Community

Mālama Hawai'i



STRATEGY

Mālama
Hawai'i

- Digital/social campaign
- Airline campaigns
- Webinar series
- Aloha Canada
- Dedicated newsletters

Consumer

Travel Trade

MCI

KEY CAMPAIGNS



KEY CAMPAIGNS

- **Digital/social campaign:**

Budget - \$52,653

Dates: Aug, Sep, Oct

Expected outcome: 8,000,000+ digital gross impressions of the Mālama videos.
Will educate the travelers through videos and images on the value of Mālama.

- **Coop campaigns:**

Budget: Air Canada \$25,000; WestJet \$10,100; TravelBrands \$10,000

Dates: Nov, Dec

Expected outcome: 10,000,000+ impressions on paid and owned media promoting responsible travel in Hawai'i

HTCAN will collaborate with the 3 most important tour operators in the country (WestJet Vacations, Air Canada/Expedia and TravelBrands) to promote the travel to the islands including elements like the Mālama videos.

KEY CAMPAIGNS

- **Campaign with Costco Travel:**

Budget - \$15,000

Date: November

Expected outcome: TBD

HTCAN will partner with Costco Travel and use the Mālama videos to promote the responsible travel in their warehouses and its travel site.

- **Public Relations:**

Budget - \$12,000

Dates: December

Expected outcome: 4 to 6 individual media fams with journalists that target our audience and can talk about responsible travel and Mālama.

HTCAN will work with media with a more responsible approach and journalists that can produce and communicate the value of Mālama to their readers.

KEY CAMPAIGNS

- **Travel Trade Media:**

Budget - \$13,000

Dates: Sep., Oct

Expected outcome: 200+ enrolments & up to 8,000 views

A campaign that will encourage travel agents to become Hawai'i Destination Specialists and educate through the concept of Mālama.

- **Webinar series with Spoiled Agent:**

Budget \$4,000

Dates: Sep, Oct, Dec, Jan

Expected outcome: 600+ trained agents

A series of six webinars targeting the Canadian agents including an overview/update of the state, a cultural webinar by NaHHA and one webinar from each Island Chapter focusing on culture.

KEY CAMPAIGNS

- **Aloha Canada (virtual):**

Budget: \$34,000

Date: October 28

Expected outcome: 500+ attendees (trained)

The event will gather 20 partners, the four Island Chapters and cultural elements provided by NaHHA.

- **Trade and consumer shows:**

Budget: Air Canada Vacations \$1,500 WestJet Vacations \$1,000

Dates: September

Expected outcome: 200+ appointments plus 1,000+ attendees that will download the material.

HTCAN will participate in the tour operator shows highlighting the importance of the responsible travel.

KEY CAMPAIGNS

- **Inaugural flight event YUL-HNL:**

Budget: \$10,293

Date: December

HTCAN is planning to host an in-person event in Montreal before the launch of the YUL-HNL flight with top media and your operators to educate the market about the kind of traveler that the destination is looking for and the efforts we are doing to Mālama Hawai'i in every way.

PROPOSED BUDGET



PROPOSED BUDGET JULY - DECEMBER

	Annual Budget	Jan-Jun Actual	Bal for Jul-Dec	Jul	Aug	Sept	Oct	Nov	Dec
Fixed Costs	86,220	89,948	86,220	14,370	14,370	14,370	14,370	14,370	14,370
Program Budget	0	0	223,832	0	21,747	42,000	124,592	13,100	22,393
Total	400,000	89,948	310,052	14,370	36,117	56,370	138,962	27,470	36,763

PERFORMANCE MEASURES



BMP PERFORMANCE MEASURES

	Original Annual Target	Original Semi-Annual Targets	Updated Annual Target	Updated Semi-Annual Targets		YTD
Leisure Travel Trade						-
...Trade Shows						-
No. of Trade Shows	4	0	4	3	0	3
No. of Appointments	200	0	200	150	0	150
...Travel Trade FAMs						-
No. of Travel Trade FAMs	1	0	1	0	0	0
No. of Participants	10	0	10	0	0	0
...Trade Education						-
No. of Trade Education Sessions	6	0	6	6	0	6
No. of Participants	700	0	700	700	0	700
No. of Agents Completed Online Training Program	405	202	203	405	202	203
Industry Collaboration						-
No. of Meetings with Hawai'i Industry Partners	24	12	12	24	12	12
No. of Hawai'i Industry Partners Met With	24	12	12	24	12	12



HAWAII TOURISM™

CANADA

5

Presentation by *Hawai'i Tourism Oceania* on Brand Management Plan Amendments and Updates.
Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board.



2021 BMP UPDATE

**HTA MARKETING STANDING COMMITTEE MEETING
9.1.2021**

Darragh Walshe
Account Director

MARKET SITUATION



MARKET SITUATION OVERVIEW

- Strong domestic economies from Covid elimination approach
- Low unemployment
- Strong currency versus USD
- Recent arrival of Delta strain of Covid-19 has meant the return of community cases (still low from a global perspective)
- Much of AU & NZ has thus entered a lockdown status

MARKET SITUATION

TRAVEL RESTART

- The Governments of both Australia and New Zealand have announced plans to re-open travel and tourism
- This has been welcomed positively by the travel industry
- Re-opening is linked to having the majority of the population vaccinated by the end of the year
- For AU, travel will begin for those vaccinated once the 80% threshold is met. The estimate for this is predicted to be the end of the year
- For NZ, travel will begin for those vaccinated in the new year, with some trial programs prior

MARKET SITUATION

AIRLINES & COMPETITION

- Key airline partners remain present and active in the market
- Current air schedules between AU/NZ and HNL reflect the following (subject to the situation)

Late Dec (Qantas and Hawaiian Airlines) Early Jan (Air New Zealand)

- The Trans Tasman 'bubble' (between AU & NZ) and Cook Islands – NZ bubble are both currently paused
- The sector most active at present is cruising and coach touring which has a longer planning and booking window
- Q4 is being seen as an extremely busy period for international travel marketing
- Key destinations are continuing to operate their trade education programs. This activity is likely to increase as we move towards the end of the year.

TARGET AUDIENCE

TARGET AUDIENCE

Mindful Millennials

- Couples or groups of friends
- Interests include activities, experiencing a different culture and do their bit for the planet, too.

Fun and Fit Families

- Parents with school-aged children.
- Safe, family friendly, soft adventure, cultural activities

Curious Couples

- 50+ Empty Nesters & Retirees
- Likely to travel in shoulder or low seasons
- Interested in 'local' culture, cuisine, made in Hawai'i.



RECOVERY STRATEGY



REGENERATIVE TOURISM FOCUS

Visitors
who
CARE

Visitors
who are
AWARE

Visitors
who
SHARE

Activity aligned to awareness

- Digital Marketing
- Advertising
- PR stories
- Direct Communication
- Partnerships aligned to community, culture and mālama
- Pre & post arrival messaging
- Smart social

REGENERATIVE TOURISM FOCUS

Visitors
who
CARE

Visitors
who are
AWARE

Visitors
who
SHARE

Activity promoting the sharing of experiences

- Media & Influencers with the right audience and who share our values
- Promotions which encourage sharing of personal experiences from both local Hawai'i residents and visitors
- Strong social network presence
- Partnerships with social media special interest groups
- Trade campaigns with partners who are aligned with our target audience
- Pre & post arrival messaging
- Hashtag focus

KEY CAMPAIGNS/PROGRAMS



TRADE & MEDIA EDUCATIONAL WORKSHOPS

Trade & Media Events Destinalional Showcase Regenerative Tourism themes

- Audience: Travel Trade & Trade Media
- Introduction of the mālama concept to the trade and media through events in key cities
- These events will act as the 're-launch' of the destination getting our key trade and media partners ready to promote the destination
- Budget US\$30,000
- Timing Nov-Dec



MĀLAMA HAWAI‘I

Trade & Industry partnerships

- Audience: Mindful Millennials; Curious Couples; Fun & Fit Families
- Work with trade partners on education of experiences aligned with mālama principles for future product placement
- Trade activity and face to face re-connection with key travel agents, introducing them to mālama concept
- Identify key product managers and journalists for Q1 mālama – focused familiarization
- Content partnership around the principles of mālama
- Blog series based on the concept of mālama
- Budget US\$20,000
- Timing Oct-Dec

PR and Digital Push



INFINITE EXPERIENCES CAMPAIGN

Influencer famil

- Audience: Mindful Millennials; Curious Couples
- Content aligned to Mālama Hawai'i and Infinite Experiences
- The influencer part of this campaign will begin in Q1 2022
- In Q4 we will begin seeding content aligned with infinite experience across social, our blog and newsletters
- We will begin negotiations with the influencers who will take part
- We will also use Q4 to arrange and book the itineraries for each influencer
- Budget US\$40,000
- Reach 1 million
- Timing Oct-Feb

Audience polls



Live streaming



PROPOSED BUDGET



PROPOSED BUDGET JULY - DECEMBER

	Annual Budget	Jan-Jun Actual	Bal for Jul-Dec	Jul	Aug	Sept	Oct	Nov	Dec
Fixed Costs	\$182,887	\$80,423	\$102,464	\$12,866	\$12,866	\$12,866	\$12,866	\$25,500	\$25,500
Program Budget	\$217,113	\$6,739	\$210,374	\$0.00	\$0.00	\$0.00	\$15,000	\$97,500	\$97,874
Total	\$400,000	\$87,162	\$312,838	\$12,866	\$12,866	\$12,866	\$27,866	\$123,000	\$123,374

PERFORMANCE MEASURES

PERFORMANCE MEASURES

Consumer Ad Measures	
Digital Reach	1,000,000
Digital Gross Impressions - Total Audience	2,000,000
Public Relations Measures	
...Publicity Value	528,862
...Number of Impressions	2,467,962
Trade Education	
No. of Trade Education Sessions	15
No. of Participants	980
No. of Agents Completed Online Training Program	600

PERFORMANCE MEASURES

Social Media Metrics	
Facebook Total Impressions Gained	1,443,188
Instagram Total Impressions Gained	741,491
MCI Room Nights	
Total Citywide MCI Tentative Room Nights	2,800
Total Single Property MCI Tentative Room Nights	1,000
Total Single Property MCI Definite Room Nights	250

6

Presentation by *Hawai'i Tourism Japan* on Brand Management Plan Amendments and Updates. Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board



2021 BMP UPDATE

**HTA MARKETING STANDING COMMITTEE MEETING
9.01.2021**

Eric Takahata
Managing Director

MARKET SITUATION

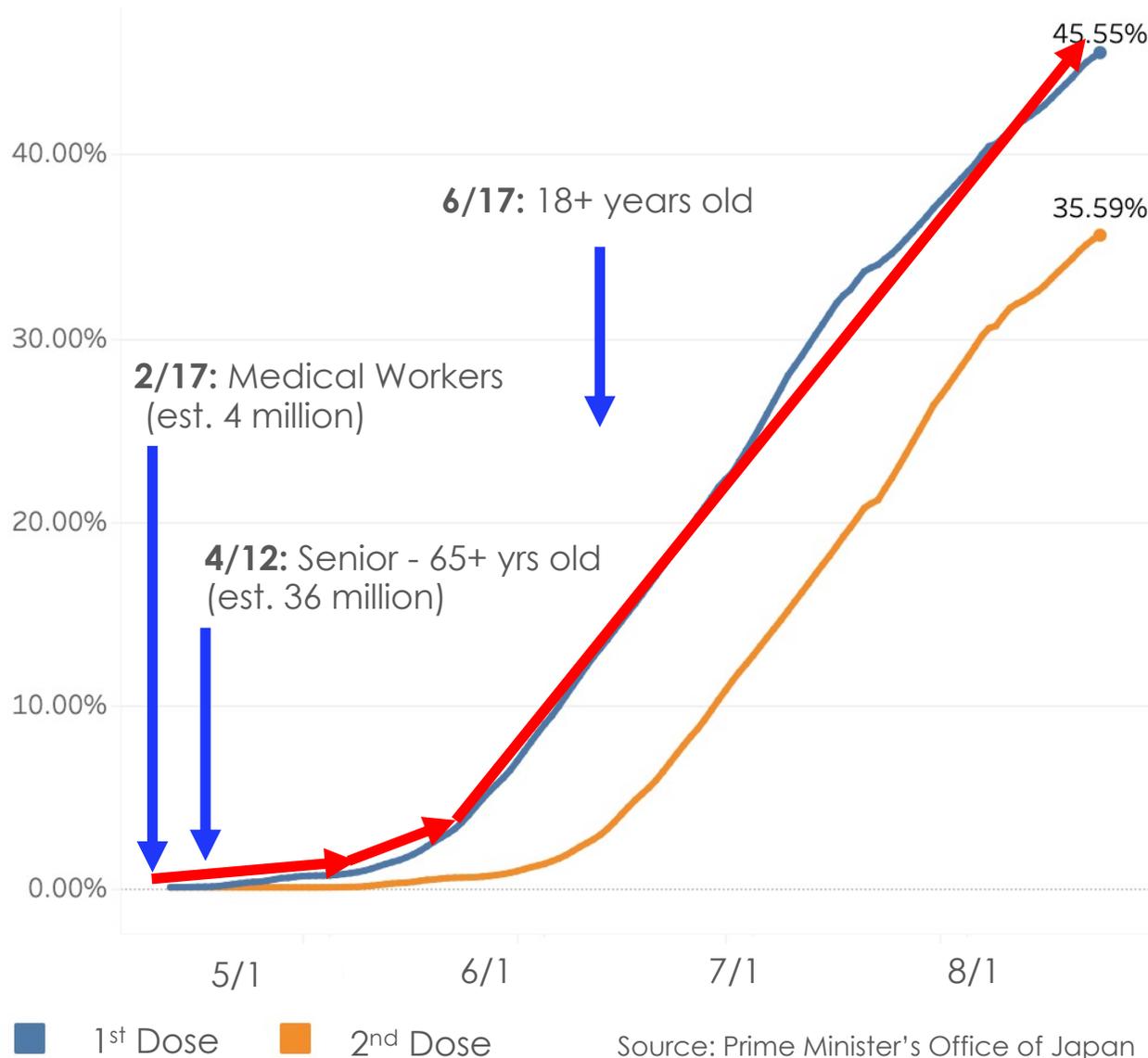


GENERAL ECONOMY



- Japan GDP rebounds in Q2 with 1.3% annualized growth
- Consumption rose 0.8% in April-June (vs Previous Qtr)
- Capital expenditure increased 1.7% (vs Previous Qtr)
- Domestic demand contributed 0.6% point to GDP growth
- Exports rose 2.9% in April-June (vs Previous Qtr) in a sign the global recovery continued to underpin Japan's economy

JAPAN VACCINATION PROGRESS



- State of emergency extended until 9/12 to 13 prefectures
- Japan government target 80% vaccination by December

Vaccination progress (as of Aug. 25)

	U.S.	Hawai'i	Japan
Initiated	61.0%	70.6%	45.55%
Completed	51.7%	62.3%	35.59%

VACCINATION CERTIFICATES

- Vaccine passport program started **July 26** for oversea travel
- Applications filed in the **municipalities**, the certificates will be issued **free of charge**
- The Foreign Ministry's website features **23 countries and regions** (as of 8/19) that have eased quarantine measures for those with a vaccine passport. (i.e. Guam, Singapore, Korea)



新型コロナウイルスワクチン接種証明書
Vaccination Certificate of COVID-19

姓(旧姓) / 名(別名)
 [Surname(Former Surname) / Given Name(Alternative Given Name)]
 患者(土田) / 良子(花子)
 [KANJA(TSUCHIDA) / YOSHIKO(HANAKO)]

生年月日 [Date of birth (YYYY-MM-DD)]
1985-02-19

国籍 [Nationality]:
JAPAN

旅券番号 [Passport Number]:
TR123456



1回目 [First Dose]:	2回目 [Second Dose]:
ワクチン種類 [Vaccine Type]: C19-mRNA	ワクチン種類 [Vaccine Type]: C19-mRNA
メーカー [Manufacturer]: ファイザー [Pfizer]	メーカー [Manufacturer]: ファイザー [Pfizer]
製品名 [Product Name]: コミナティ [Comirnaty]	製品名 [Product Name]: コミナティ [Comirnaty]
製造番号 [Lot number]: CTMAVXXXX	製造番号 [Lot number]: CTMAVXXXX
接種日時 [Vaccination Date]: 2021-05-30	接種日時 [Vaccination Date]: 2021-06-25
接種国 [Country of vaccination]: 日本 [JAPAN]	接種国 [Country of vaccination]: 日本 [JAPAN]

証明書発行機関 [Certificate Issuance Authority]

○○県●●市長
 [Mayor of ●● City, ○○ Prefecture]

日本国厚生労働大臣
 [Minister of Health, Labour and Welfare, Government of Japan]

証明書ID [Certificate Identifier]
XXXXXX-XXXXXXXX-XXXXXX

証明書発行日 [Issue Date]
2021-06-21

MARKET CONDITIONS ~AIRLIFT (AUGUST/SEPTEMBER)~



August

Op Airline Name	Flight #	Origin Code	Total Flights	Seats
All Nippon Airway	NH 186	HND	6	1,476
All Nippon Airway	NH 184	NRT	2	1,040
Hawaiian Airlines	HA 822	NRT	14	3,892
Hawaiian Airlines	HA 450	KIX	4	1,112
Japan Airlines	JL 74	HND	13	2,534
ZIPAIR Tokyo	ZG2	NRT	4	1,160
Total			43	11,214

Total Flights # by airport
 ❖ Haneda-19
 ❖ Narita-20
 ❖ Kansai-4
10 to 11 flights per week

September

Op Airline Name	Flight #	Origin Code	Total Flights	Seats
All Nippon Airway	NH 186	HND	8	1,968
Hawaiian Airlines	HA 822	NRT	13	3,614
Hawaiian Airlines	HA 450	KIX	5	1,390
Japan Airlines	JL 74	HND	10	2,150
ZIPAIR Tokyo	ZG2	NRT	5	1,450
Total			41	10,572

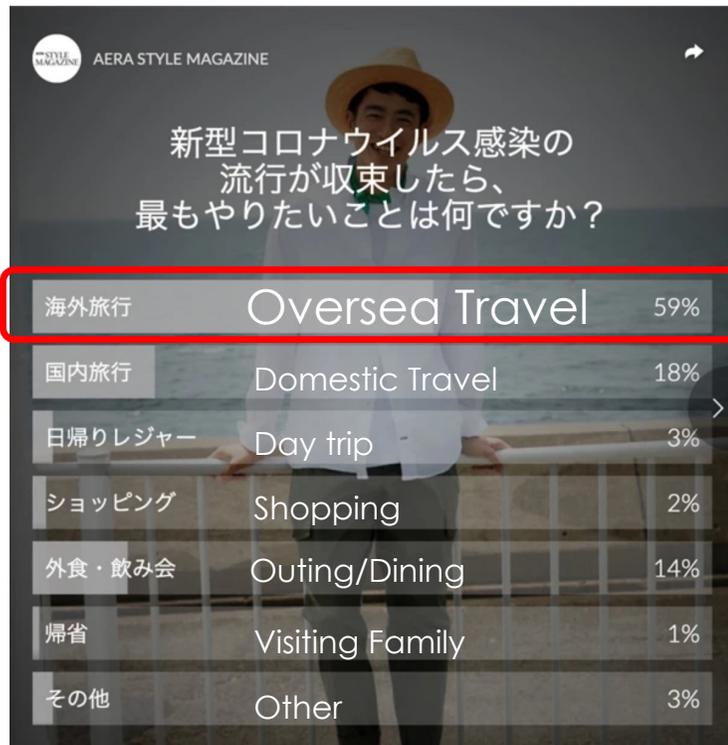
Total Flights # by airport
 ❖ Haneda-18
 ❖ Narita-18
 ❖ Kansai-5
10 to 11 flights per week

CONSUMER SENTIMENT

AERA STYLE MAGAZINE

Q: What activity would you like to do after COVID-19 is over

A: No. 1: Oversea Travel



Expedia.co.jp

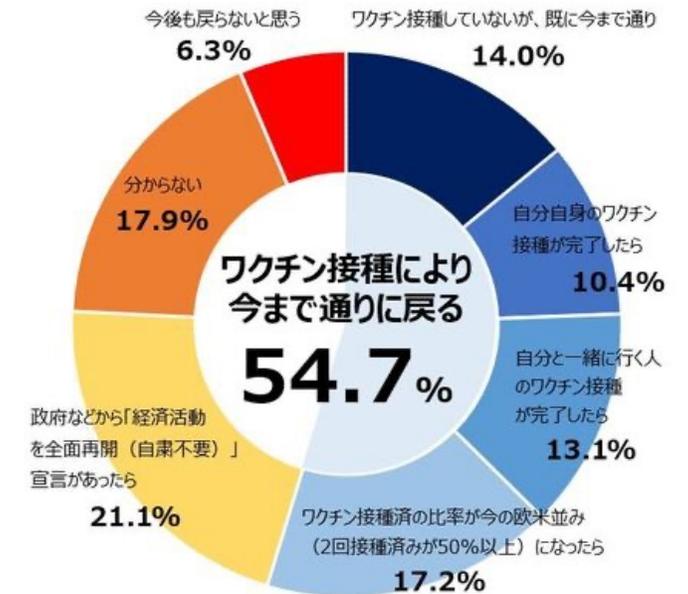
Search Ranking for Dec-Jan

- #1: O'ahu
- #2: Okinawa
- #3: Bangkok

Expedia 【日本】		
エクスペディア旅行先検索ランキング		
	8月~9月	12月~1月
1	沖縄	オアフ島 (アメリカ)
2	東京	沖縄
3	北海道 札幌、ニセコ除く	バンコク (タイ)
4	大阪	東京
5	札幌	大阪
6	静岡	シンガポール
7	京都	バリ島 (インドネシア)
8	長野	台北
9	千葉 舞浜、成田	京都
10	福岡	プーケット (タイ)

Q: What is the most important factor for domestic travel recovery?

A: 54.7% answer vaccination



MS&Consulting Co., Ltd. (Sample size: 1,057)

OTHER DESTINATIONS TOURISM RECOVERY

Destination	Category	Details
Korea	Event	- Online Korea Summer Festival & SNS campaign
Taiwan	Event	- Taiwan promotion event held (8/5-10) in Tokyo
Hong Kong	Ease Restriction Travel Trade efforts	- Accepting entry with Vaccine passport from 8/9 - Shorten the quarantine period to 7 days - Tourism support funds (\$3.79 Mil HKD) to Hong Kong travel industry
Guam	Tourism Recovery	- 80% adults completed vaccine - Operating complementary trolley in Tumon area as tourism recovery initiative
Australia	Event	- B2B Online Olympic event (meet with Olympian) - "Australia My Bucket List" special site launch and SNS campaign
New Zealand	Tourism Reopen plan	- Government expressed inbound tourism recovery from early 2022

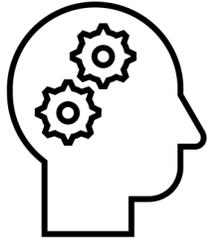
RECOVERY STRATEGY



— MĀLAMA —
HAWAII

地球にやさしい旅を

RECOVERY STRATEGY



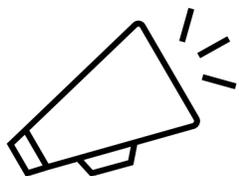
- Reinforce Hawai'i's new tourism direction and messaging in the Japan market



- Communicate with industry partners to adopt a unified message while developing responsible and sustainable experiences for visitors that promote the movement towards regenerative tourism



- Educate visitors to be mindful travelers
- Continue reinforcing messages to direct consumers and industry partners



KEY CAMPAIGNS/PROGRAMS



TARGET AUDIENCES

- Hawai'i repeat visitors
- Japanese hula communities
- New-normal workers who have more flexibility and disposable income
- Timeshare owners
- Japanese corporations with SDG framework and dedicated budget to drive CSR initiatives (MICE)
- Top ranked schools which focus on science, environmental education and cultural exchange (MICE)

3 KEY CAMPAIGN/PROGRAMS

1

On island infrastructure development and community engagement

2

Direct consumer initiatives

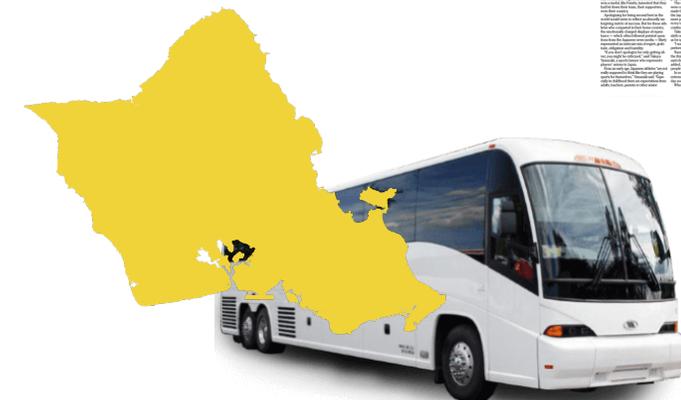
3

Travel trade programs

KEY CAMPAIGN/PROGRAMS

1. On island infrastructure development & community engagement

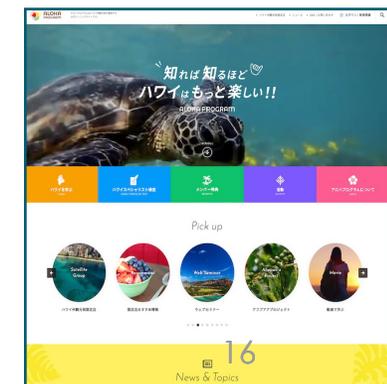
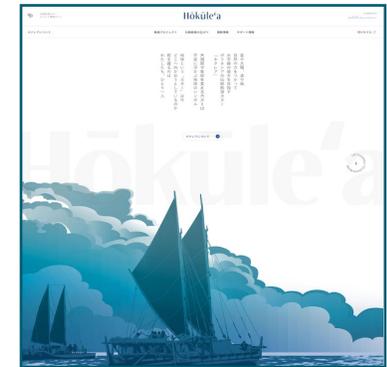
- HTA/State Agency Online Reservation system assistance (Budget: \$300,000)
- Local community engagement through local media (Budget: \$200,000)
- O'ahu Visitor Shuttle Bus Initiative (Budget: \$1,138,804)



KEY CAMPAIGN/PROGRAMS

2. Direct consumer initiatives

- “Mālama Hawai‘i” microsite development & video production and distribution (Budget: \$200,000)
- Hōkūle‘a Initiative Preparation and education (Budget: \$50,000)
- Hawaiian Culture: Aloha Program Education Program (Budget: \$60,000)

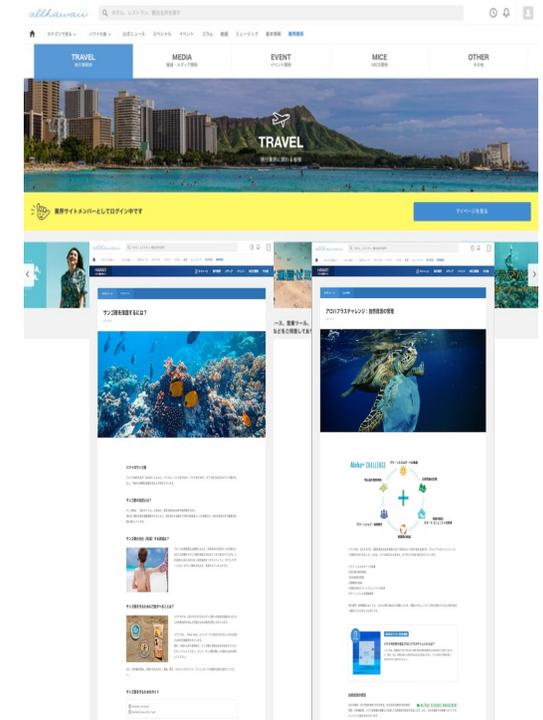
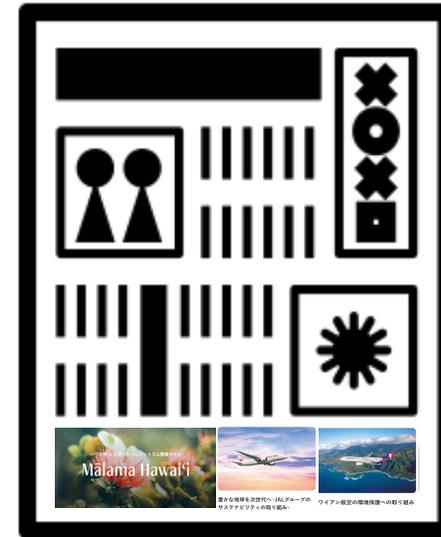


Reach	Impression	AVE
20,621,149	13,202,036,841	\$9,319,800

KEY CAMPAIGN/PROGRAMS

3. Travel trade programs

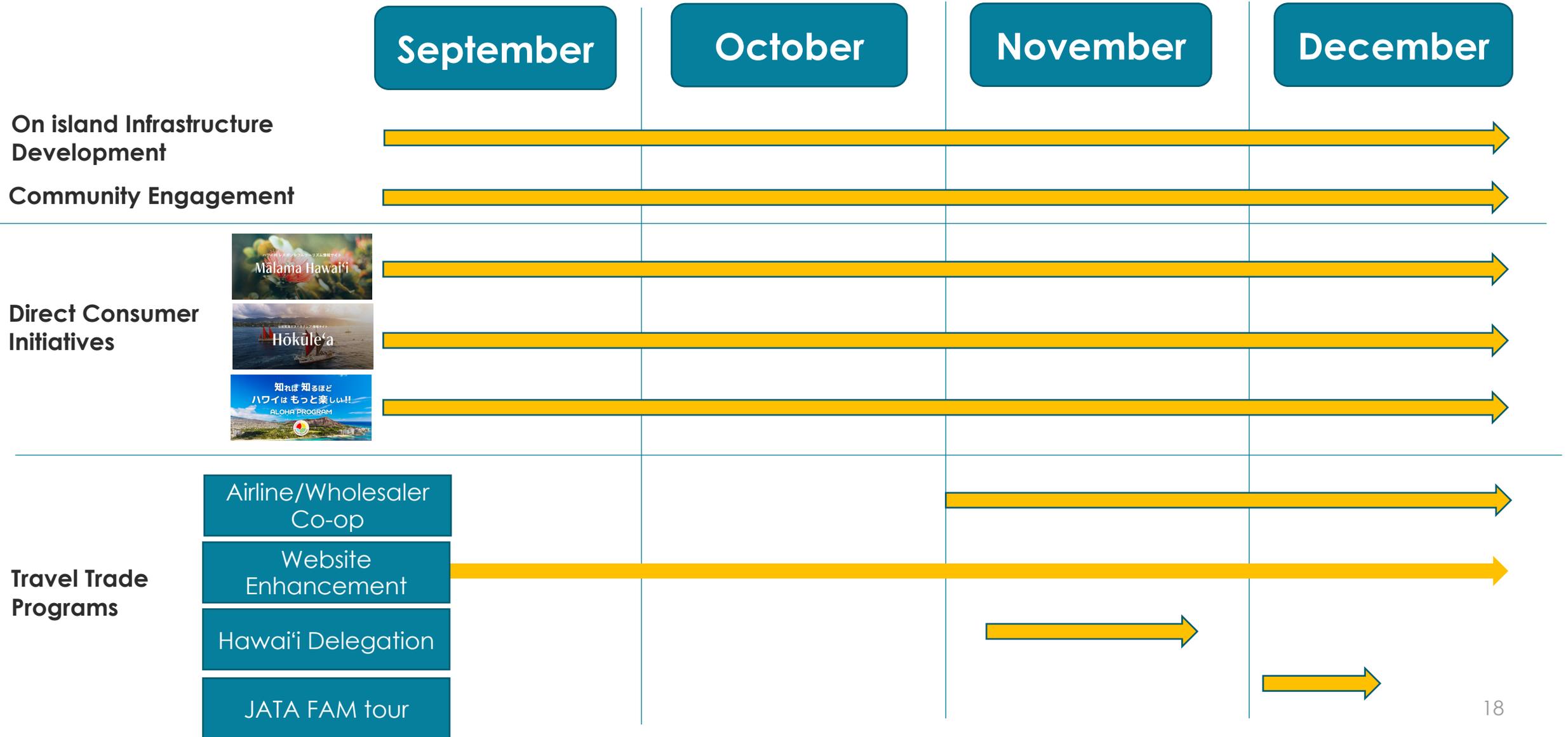
- Airline Co-op (Budget: \$200,000)
- Wholesaler Co-op (Budget: \$100,000)
- Hawai'i Delegation (Budget: \$100,000)
- JATA FAM tour (Budget: \$50,000)
- Enhancement on travel trade education through our travel trade website (Budget: \$50,000)



Goal: to increase the bookings from Year-end 2021 toward Spring 2022



CAMPAIGNS TIMELINES



PROPOSED BUDGET



PROPOSED BUDGET JULY - DECEMBER

	Annual Budget	Jan-Jun Actual	Bal for Jul-Dec	Jul	Aug	Sept	Oct	Nov	Dec
	\$2,051,196	\$1,032,715	\$1,018,481	\$165,082	\$169,667	\$170,933	\$170,933	\$170,933	\$170,933
Program Budget	\$2,448,804	\$0	\$2,448,804	\$0	\$0	\$145,015	\$303,750	\$1,278,750	\$721,289
Total	\$4,500,000	\$1,032,715	\$3,467,285	\$165,082	\$169,667	\$315,948	\$474,683	\$1,449,683	\$892,222

PERFORMANCE MEASURES



PROPOSED PERFORMANCE MEASURES

	Annual Target Most Recent (REV 2/17)	Annual Target Updated on 8/18	Semi-Annual Targets Updated on 8/18	
			Jan-Jun	Jul-Dec
LEISURE MEASURES				
Consumer Ad Measures				
TV Reach	NA	8,608,000	NA	8,608,000
Print Reach	16,350,250	16,350,250	5,605,250	10,745,000
Digital Reach	214,497,272	14,119,448	-	14,119,448
Radio Reach	3,826,100	2,164,600	1,832,300	332,300
TV Gross Impressions	NA	21,201,600	NA	21,201,600
Print - Total Audited Circulation	4,671,500	4,671,500	1,601,500	3,070,000
Digital Gross Impressions - Total Audience	104,363,816	21,312,720	-	21,312,720
Radio Gross Impressions	9,450,467	5,346,562	4,525,781	820,781
Out of Home Gross Impressions	6,736,800	1,122,800	-	1,122,800
Public Relations Measures				
...Publicity Value				
Print	1,330,000	1,330,000	\$330,000	\$1,000,000
Online	3,699,600	3,809,600	\$1,599,600	\$2,210,000
Broadcast	10,180,000	13,500,000	\$3,200,000	\$10,300,000
...Number of Impressions				
Print	3,090,000	3,090,000	1,050,000	2,040,000
Online	18,350,000,000	26,000,000,000	6,600,000,000	19,400,000,000
Broadcast	274,000,000	352,000,000	74,000,000	278,000,000
Social Media Metrics				
INSTAGRAM				
Total Impressions Gained	3,556,536	5,581,536	1,036,536	4,545,000
Total Interactions Gained	265,440	315,440	97,440	218,000
Total Fan Count	148,200	149,700	141,200	149,700
Increase in Fans	12,800	14,300	5,600	8,700
Total Posts	215	240	95	145

7

Presentation by *Hawai'i Tourism USA* on Brand Management Plan Amendments and Updates.
Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board.



2021 BMP UPDATE

**HTA MARKETING STANDING COMMITTEE MEETING
9.01.2021**

MARKET SITUATION

MARKET SITUATION

General Economy

- U.S. economy remains at the highest levels since February 2020; but has leveled out due to the increase in COVID-19 cases and the delta variant.
- Consumer spending will continue to support robust economic growth for the remainder of 2021.
- Unemployment in July 2021, dropped to a 16-month low of 5.4%

COVID-19 Cases (on August 29, 2021)

- U.S. - 156,886 new cases for a total of 38,875 million.
- Hawaii - 720 new cases for a total of 62,949.

Vaccination Timeline (on August 29, 2021)

- U.S. - 173.8 million U.S. residents are fully vaccinated (52.0% of the U.S. population)
- Hawaii - 897,632 Hawaii residents are fully vaccinated (63.1% of all residents)

MARKET SITUATION

INBOUND TRAVEL RESTRICTIONS

Inbound Travel Restrictions

- CDC recommends that non-vaccinated U.S. residents refrain from taking domestic trips. <https://www.cdc.gov/coronavirus/2019-ncov/travelers/travel-during-covid19.html>
- Residents who are fully vaccinated with an FDA-authorized vaccine or a vaccine authorized for emergency use by the World Health Organization can travel safely within the United States.
- Wearing a mask over your nose and mouth is required on planes, buses, trains, and other forms of public transportation traveling into, within, or out of the United States and while indoors at U.S. transportation hubs such as airports and stations. <https://www.cdc.gov/coronavirus/2019-ncov/travelers/face-masks-public-transportation.html>

MARKET SITUATION

TRAVEL SENTIMENT, COMPETITION

General Travel Sentiment

- As the Delta variant continues, 54% of U.S. travelers report they are less interested to travel now.
- However, the population that does desire to travel, is still strong with over 50% of them expecting to take at least one overnight trip through November.
- 66% of the U.S. traveling population are now fully vaccinated.

Competitive Destination Activity

- *Puerto Rico* now requires vaccination or testing for all paid accommodations. The U.S. territory now requires that both guests and employees of all hotels, guest houses and short-term rentals, including Airbnb and VRBO rentals, must submit either proof of vaccination or a negative COVID-19 test taken within 72 hours of their arrival on property.
- *United Kingdom*. In early August, vaccinated Americans can now enter England, Scotland and Wales without a mandatory quarantine. Fully vaccinated Americans arriving into England, Scotland and Wales are required to submit a predeparture negative COVID-19 test taken prior to arrival

MARKET SITUATION – AIR SEATS

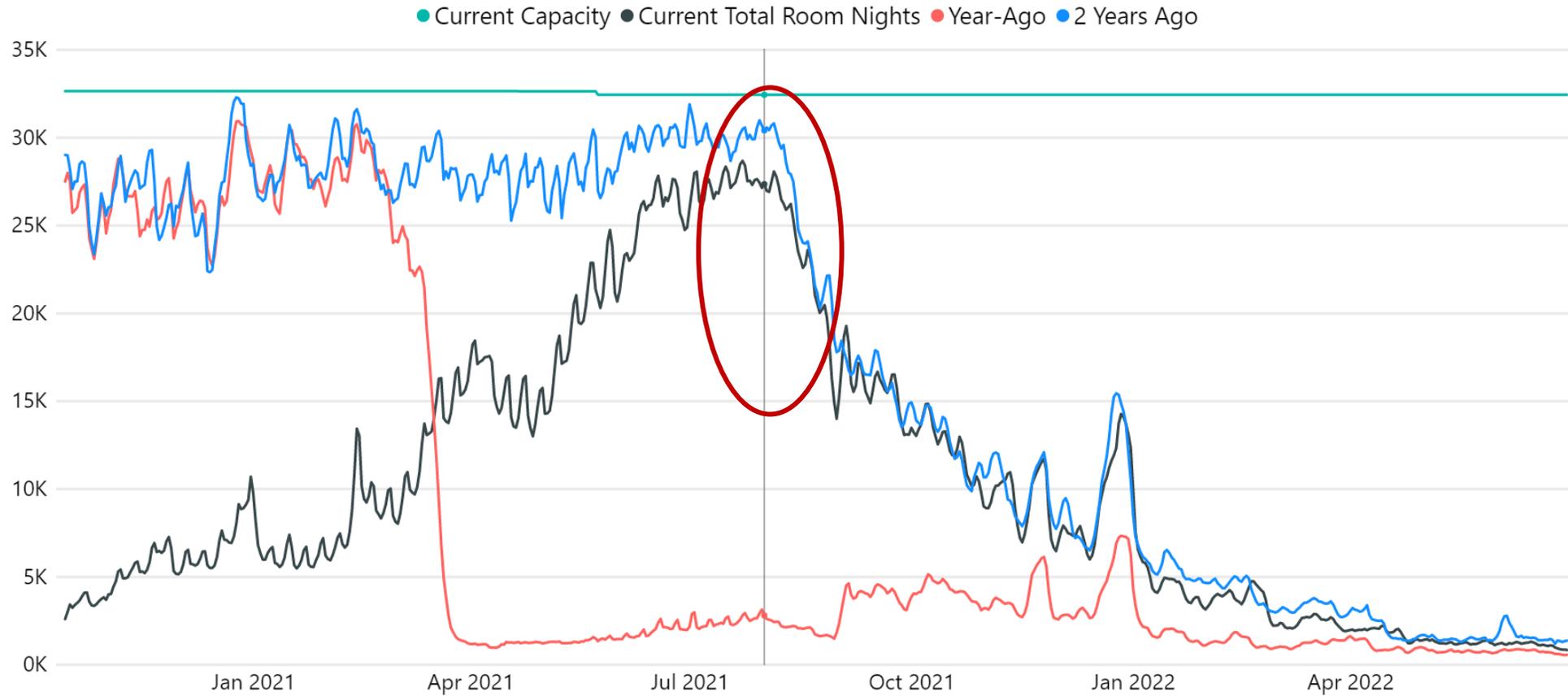
U.S. Air Seats – as of August 29, 2021

	# of SEATS September 2019	# of SEATS September 2021P	% Change	# of SEATS October 2019	# of SEATS October 2021P	% Change	# of SEATS November 2019	# of SEATS November 2021P	% Change	# of SEATS December 2019	# of SEATS December 2021P	% Change
O'ahu	382,095	473,823	24.0%	399,574	474,413	18.7%	395,176	477,853	20.9%	456,929	507,938	11.2%
Maui	197,711	271,277	37.2%	211,816	277,397	31.0%	209,739	274,495	30.9%	250,970	314,244	25.2%
Kona	64,956	119,681	84.2%	72,590	125,465	72.8%	78,213	124,913	59.7%	98,565	147,153	49.3%
Kaua'i	63,608	100,317	57.7%	72,357	103,172	42.6%	77,342	103,379	33.7%	87,481	116,502	33.2%
Hilo	3,486	4,117	18.1%	4,648	3,938	-15.3%	3,818	4,319	13.1%	4,316	5,146	19.2%
Total	711,856	969,215	36.2%	760,985	984,385	29.4%	764,288	984,959	28.9%	898,261	1,090,983	21.5%

MARKET SITUATION

TRAVEL SENTIMENT – HOTEL BOOKING PACE

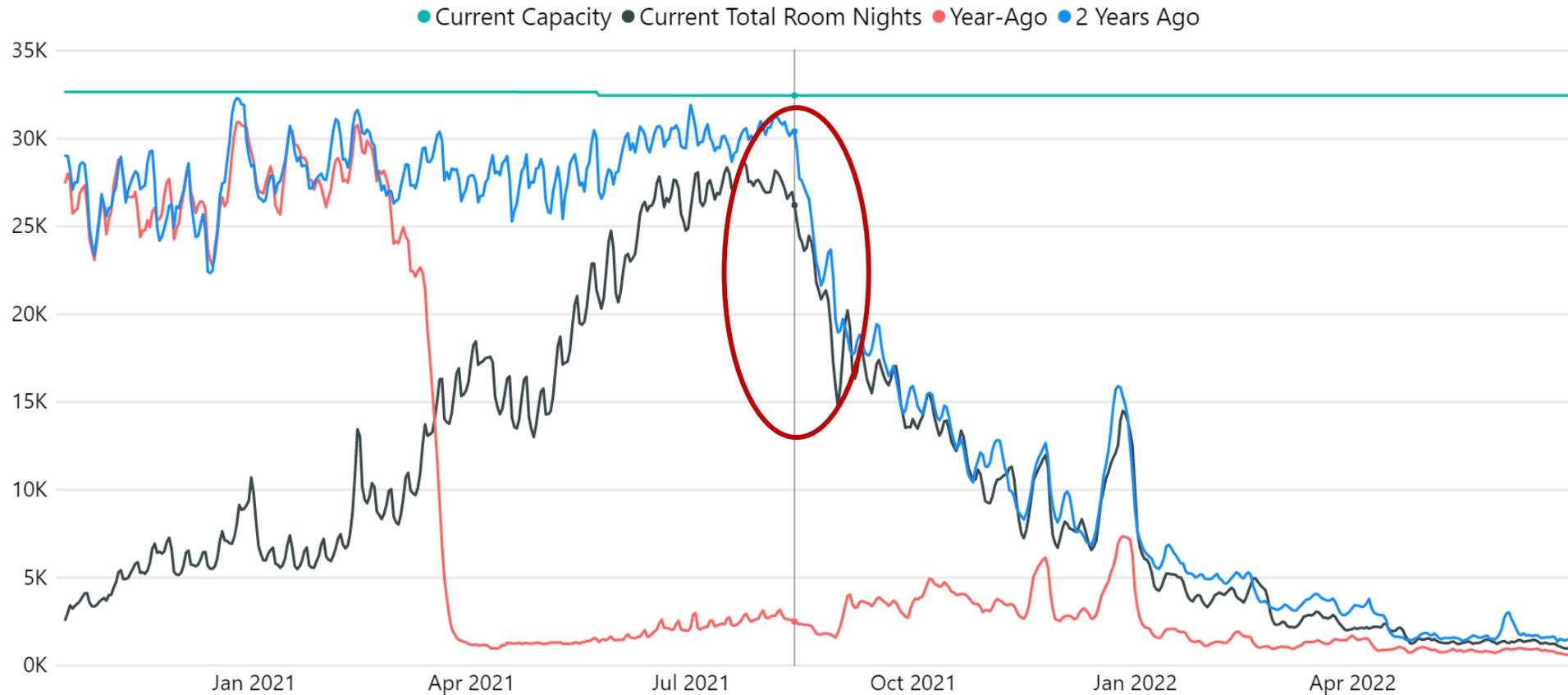
Statewide Total Room Nights on the Books
October 2020 through July 2022 YOY (as of August 1, 2021)



MARKET SITUATION

TRAVEL SENTIMENT – HOTEL BOOKING PACE

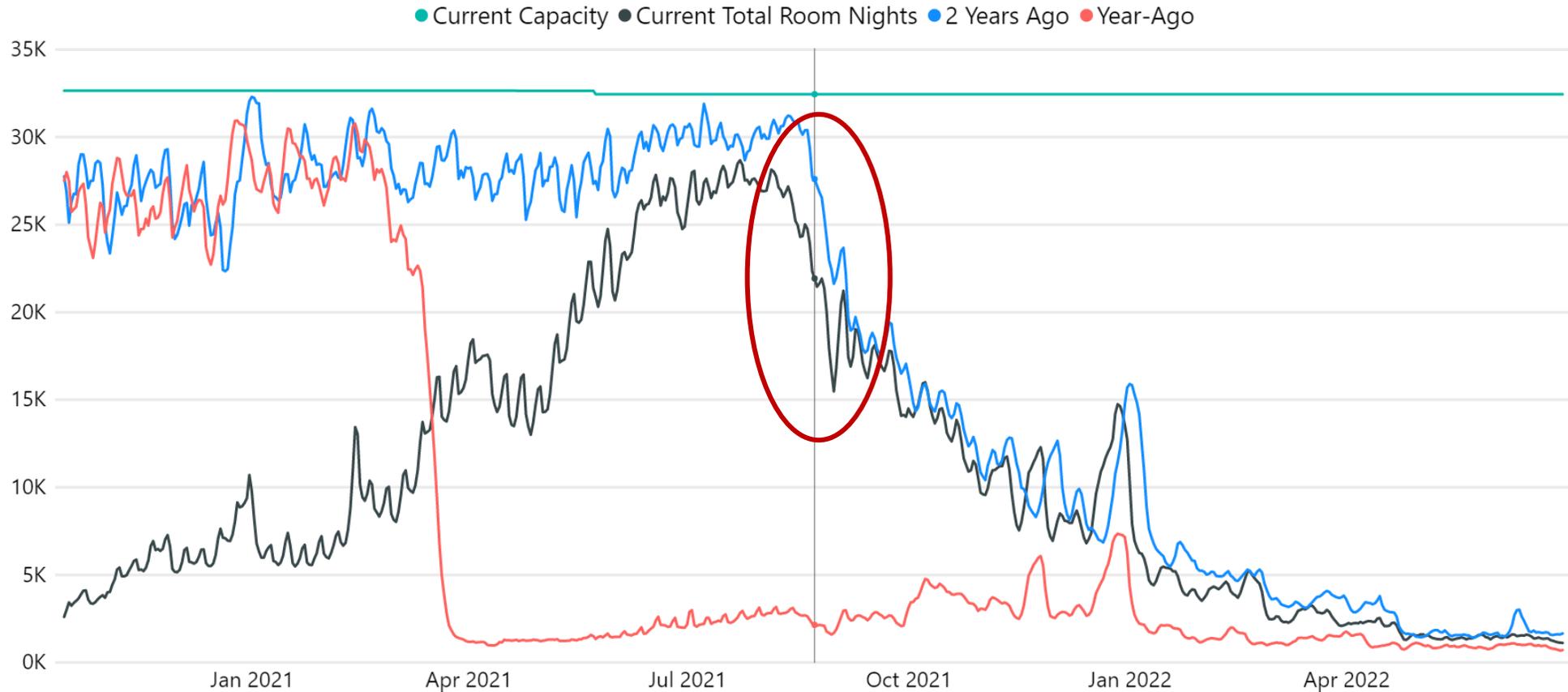
Statewide Total Room Nights on the Books
October 2020 through July 2022 YOY (as of August 8, 2021)



MARKET SITUATION

TRAVEL SENTIMENT – HOTEL BOOKING PACE

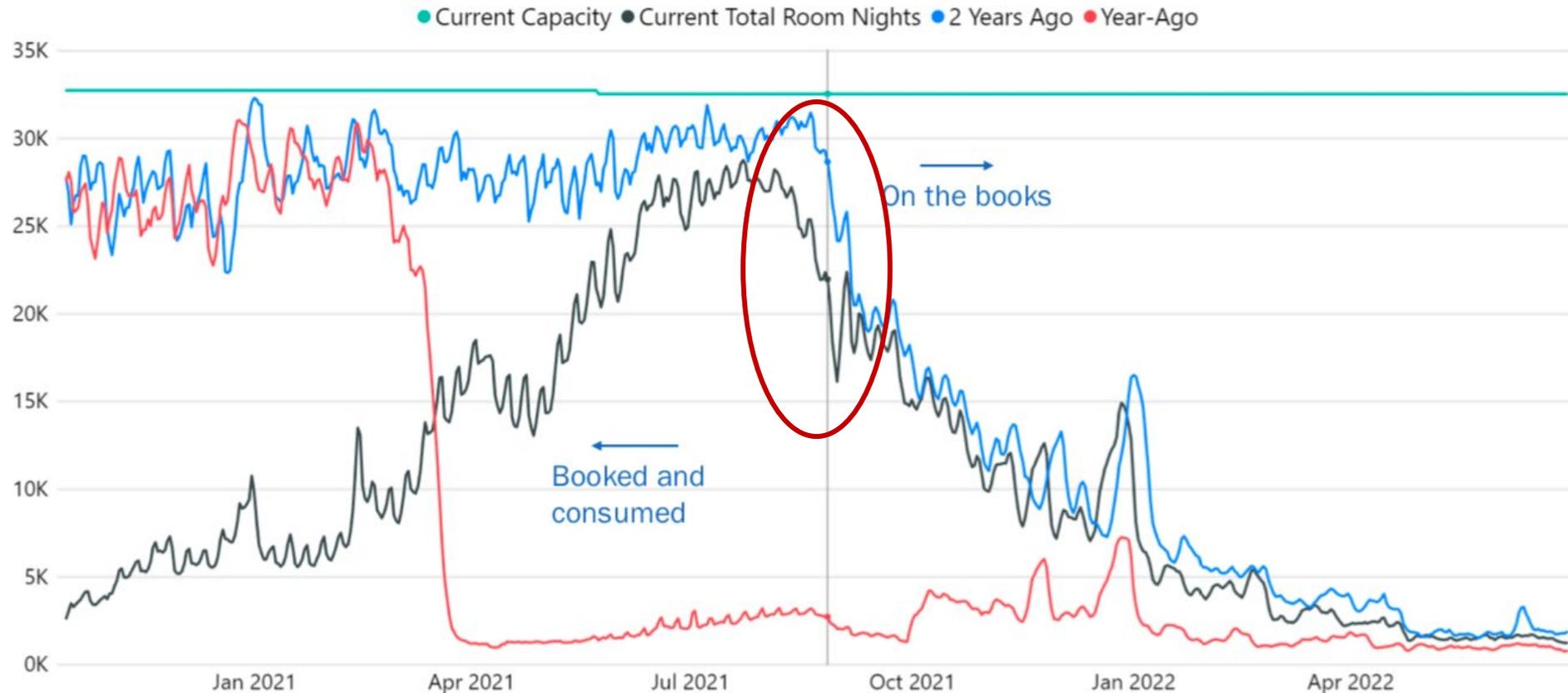
Statewide Total Room Nights on the Books
October 2020 through July 2022 YOY (as of August 15, 2021)



MARKET SITUATION

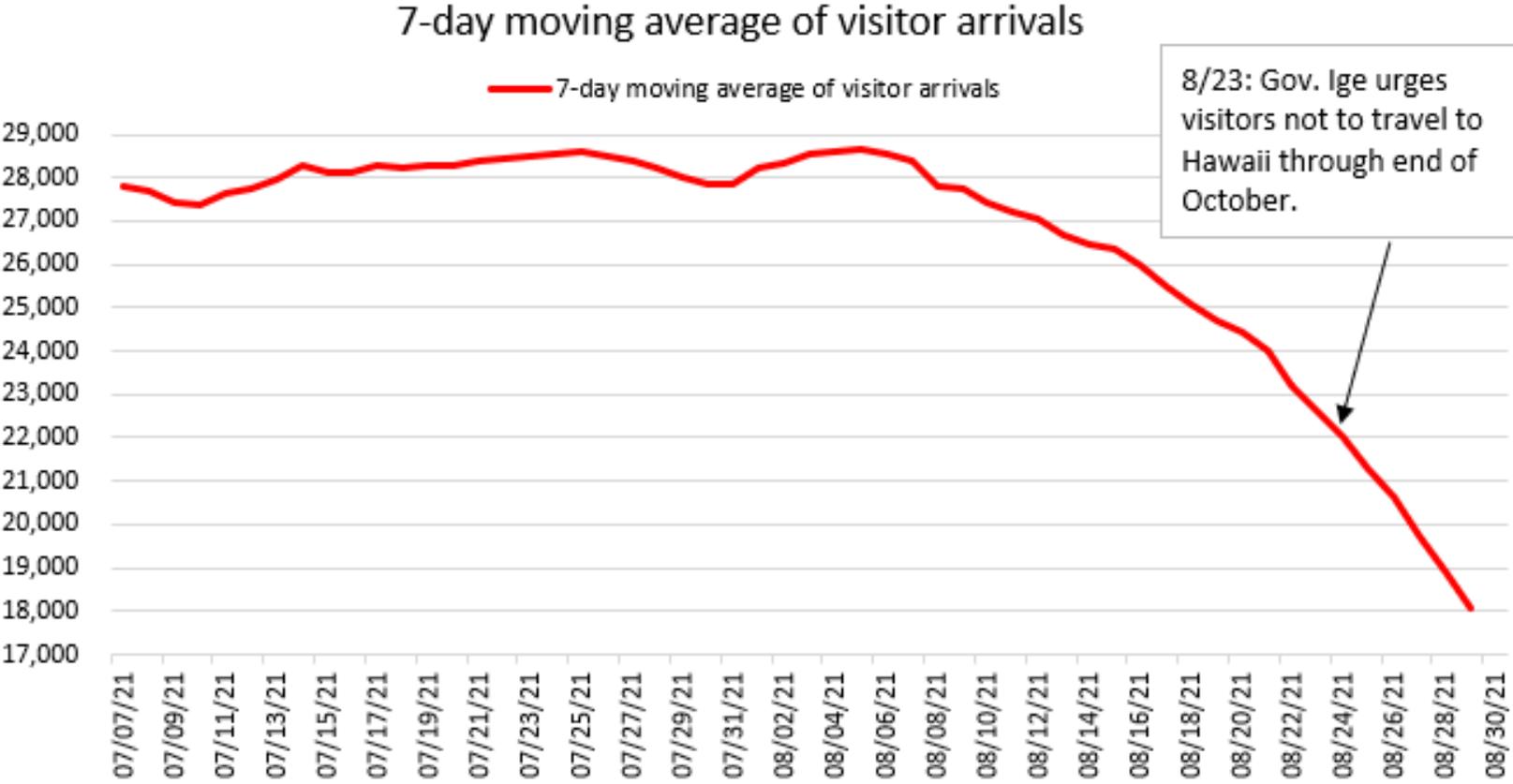
TRAVEL SENTIMENT – HOTEL BOOKING PACE

Statewide Total Room Nights on the Books
October 2020 through July 2022 YOY (as of August 22, 2021)



MARKET SITUATION

ESTIMATED DAILY VISITOR ARRIVALS



Source: HVCB analysis of HTA information derived from data provided through Office of Enterprise Technology Service's Safe Travels

TARGET AUDIENCE

TARGET AUDIENCE GENERAL ATTITUDES

*The **Mindful Visitor** is someone who cares about the environment, enjoys going to a vacation destination with many activities, as well as learning about foreign cultures.*

- I like to learn about foreign cultures (166)
- I prefer an active vacation with many activities (208)
- People often ask my advice when it comes to planning their vacations (139)
- I would rather spend money on traveling than other products (136)
- I Consider myself a Green Advocate (253)
- I am a super influential consumer when it comes to Environmentally friendly products (336)
- I am interested in finding out how I can help the environment (170)

TARGET AUDIENCE KEY DEMOGRAPHICS

MINDFUL RETURN VISITOR

% Male	58%
% Female	42%
Age (Median)	40
HHI (Median)	\$160k
% Married	70%
% Children in the HH (Under 18)	57%
Education Level	52%: Bachelor's Degree 32%: Post- Graduate Degree
Employment Status	91% Employed

The average age of the Mindful Return Visitor is 40. 70% are married and many of them have a higher education degree.



RECOVERY STRATEGY

RECOVERY STRATEGY MĀLAMA HAWAI‘I

*Position the Hawaiian Islands to **attract mindful visitors** – those who will **responsibly comply with the health and safety recommendations** in place, while **respectfully seeking positive connections** with the local community.*

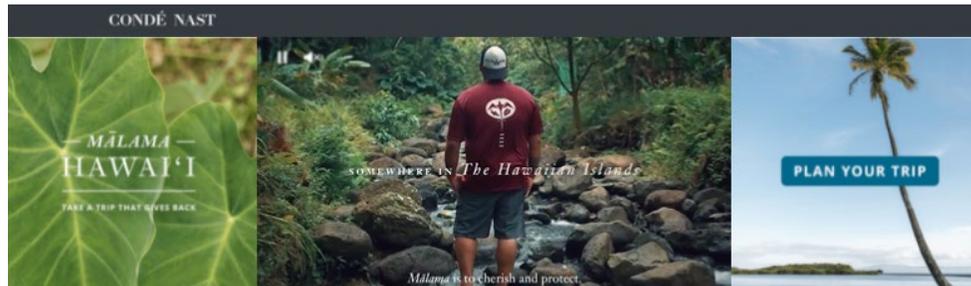
MĀLAMA HAWAI'I CAMPAIGN

- Campaign Objectives/Projected Outcomes – Increase awareness and appropriate behaviors of mindful travel in Hawai'i
- Campaign Timeline – July – December 2021

KEY CAMPAIGNS/PROGRAMS

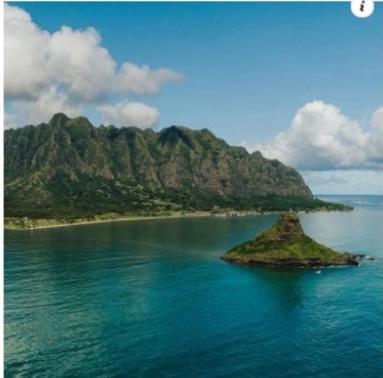


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Give Back, Travel Better

There are many ways to malama.

Learn More

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Experience Hawaii with U.S. Editor in Chief Jesse Ashlock as he learns the meaning of malama and its deep-rooted respect for an ecosystem, connection to the community, and preservation of the natural beauty of the islands.



Jesse Ashlock
US Editor in Chief, Condé Nast Traveler

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MATADOR



Farmers markets — for residents of Hawaii, they're our favorite places to buy locally inspired goods. A place where we see friendly faces every week and meet some of our neighbors and friends, our families.

Farmers markets present a simple way to give back to the land. In the spirit of *malama* (to care for), you'll learn from locals and experts in their fields of knowledge and experience, cultivating, and hand-crafting. You'll give back to the community by supporting local farmers, and you'll be helping to keep your stay while staying stocked with local produce, macadamia-nut everything, and

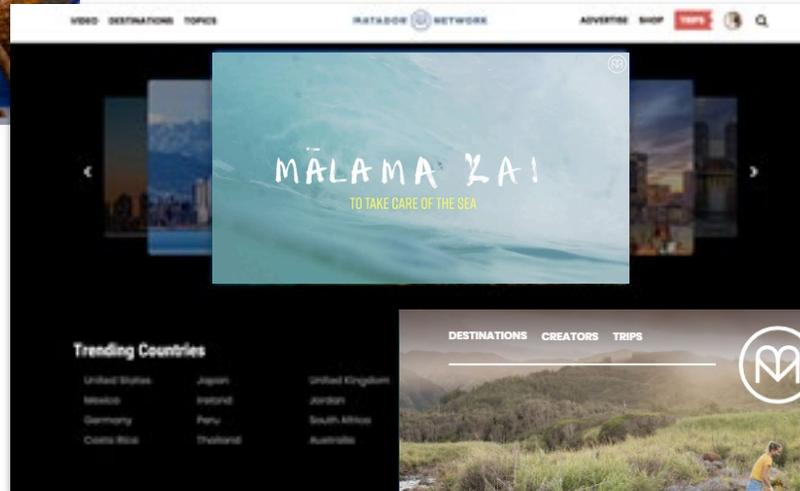


Supporting Hawaii's local farmers is the most important thing you can do on your trip

FOOD + DRINK, SUSTAINABILITY, HAWAII, UNITED STATES

Sarah Sevelo Aug 11, 2021

in paid partnership with HAWAIIAN ISLANDS



Trending Countries

- United States
- Japan
- United Kingdom
- Mexico
- France
- Italy
- Germany
- Spain
- Canada
- China
- India
- Australia



Why volunteering in Hawaii will be the best vacation you've ever had

VOLUNTEER, HAWAII, UNITED STATES

Brooke Nally Aug 10, 2021

in paid partnership with HAWAIIAN ISLANDS

There are as many ways to visit Hawaii as there are people who make the trip. Beach lounging, surfing, volcano hiking, farmers market browsing — whatever you do, you're basically assured an incredible vacation. But for travelers looking for something more, there's a different way to experience Hawaii, one that will leave you feeling a deep, authentic connection to the islands and the spirit of *malama* (meaning "to care for"): voluntourism. Volunteering in Hawaii will be the best vacation you've ever had. Here's why...and how to make it happen.

PROPOSED BUDGET

PROPOSED BUDGET JULY – DECEMBER (LEISURE)

	Annual Budget	Jan-Jun Actual	Bal for Jul-Dec	Jul	Aug	Sept	Oct	Nov	Dec
Fixed Costs	\$4,959,300	\$2,525,078	\$2,434,222	\$405,700	\$405,700	\$405,700	\$405,700	\$405,700	\$405,722
Program Budget	\$9,645,700	\$3,636,481	\$6,009,219	\$350,000	\$1,300,000	\$2,000,000	\$1,700,000	\$470,000	\$189,219
Total	\$14,605,000	\$6,161,559	\$8,443,441	\$755,700	\$1,705,700	\$2,405,700	\$2,105,700	\$875,700	\$594,941

PROPOSED BUDGET JULY – DECEMBER (GLOBAL MCI)

	Annual Budget	Jan-Jun Actual	Bal for Jul-Dec	Jul	Aug	Sept	Oct	Nov	Dec
Fixed Costs	\$1,853,550	\$903,369	\$950,181	\$158,000	\$158,000	\$158,000	\$158,000	\$158,000	\$160,181
Program Budget	\$541,450	\$207,246	\$334,204	\$38,000	\$45,000	\$80,000	\$38,000	\$72,000	\$61,204
Total	\$2,395,000	\$1,110,615	\$1,284,385	\$196,000	\$203,000	\$238,000	\$196,000	\$230,000	\$221,385

PERFORMANCE MEASURES

PERFORMANCE MEASURES LEISURE

Revised Measures	2021 Annual Target	Jan-June Target	July-Dec Target
No. of mtgs with HI industry partners	25	14	11
No. of Hawai'i Industry Partners Met with	74	39	35

PERFORMANCE MEASURES MEET HAWAI'I

Revised Measures	2021 Annual Target	Jan-June Target	July-Dec Target
MCI Trade Show appts	355	170	185
MCI FAMs			
# of FAMs	6	2	4
# of participants	50	16	34
MCI Education			
# of sessions	2	2	0
# of participants	90	90	0
# Sales Calls	1,520	560	960
Citywide Room Nights			
Citywide Tentative	190,000	68,000	122,000
Citywide Definite	40,000	0	40,000
Citywide New to HI	15,000	0	15,000

PERFORMANCE MEASURES MEET HAWAI'I (CONT.)

Revised Measures	2021 Annual Target	Jan-June Target	July-Dec Target
Single Property Room Nights			
SP Tentative	200,000	100,000	100,000
SP Definite	125,000	25,000	100,000
SP New to HI	65,000	12,000	53,000
Out-of-State Attendees	12,000	3,512	8,488
New Mtgs/Conv. Brought in	41	12	29