

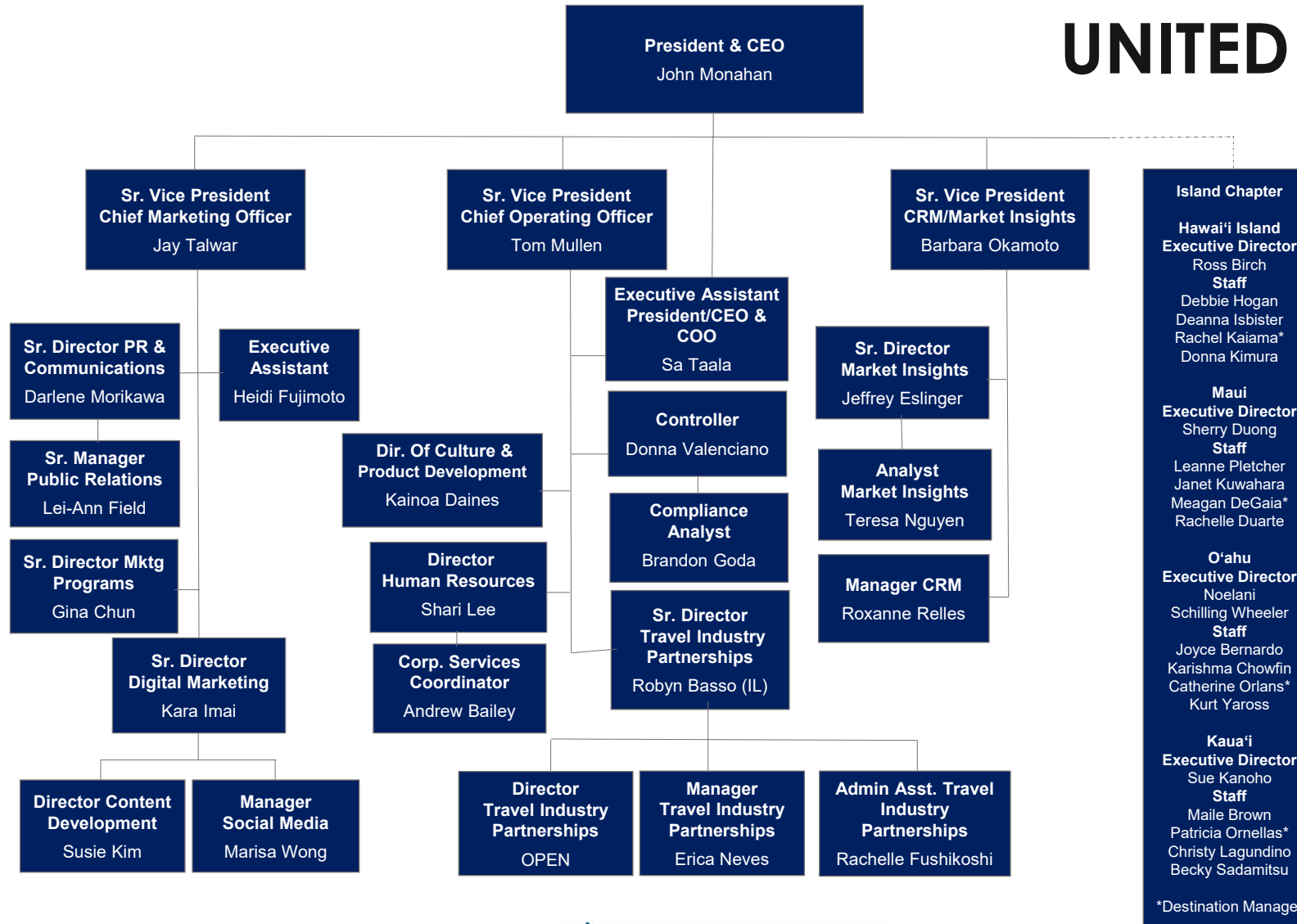


January – June 2022 BMMP

**HTA Winter Tourism Update
2.9.2022**

Jay Talwar
Chief Marketing Officer

HAWAII TOURISM UNITED STATES TEAM



MARKET SITUATION

MARKET SITUATION

General economy

- Moderate growth in 2022
- Upbeat household consumption supporting strong economic activity
- Inflation will peak in early 2022, with shifting spending mix and replenished supply leading to a better balance between supply and demand by mid-year

COVID-19 vaccinations

- As of February 2, 2022, over 539 million doses administered in U.S.; 64% are fully vaccinated; 26% have received a booster

Inbound domestic travel restrictions

- Safe Travels Hawai'i (STH) requirements apply to all passengers arriving from continental U.S. and U.S. territories
 - 5-day quarantine unless full vaccination or negative PCR NAAT test result is upload prior to boarding
 - STH expected to remain in place for the near-term 2022

General travel sentiment

- U.S. Travel Association projects that U.S. domestic travel will be 99% recovered (relative to 2019 levels) in 2022 and 102% in 2023.
- Overall, domestic leisure travel spending is estimated to reach 92% of 2019 levels by the second quarter of 2022

MARKET SITUATION

Air seats synopsis

- Forecast for non-stop transpacific domestic seats to Hawai'i as of February 2, 2022:
 - 1,522,827 seats (+8% over 2021 and +18% over 2019)

Competitive landscape

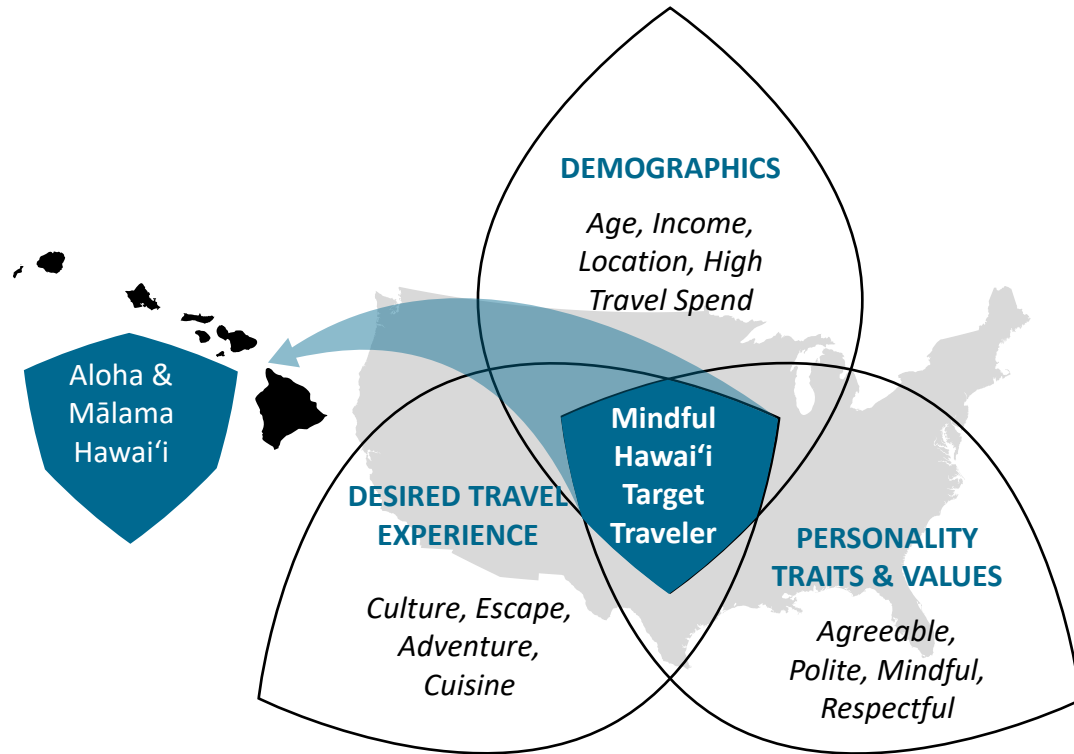
- Hawai'i remains the only state with COVID-related travel restrictions
- This makes other states and countries with relaxed or no entry restrictions more appealing
- Persistence of omicron and the emergence of new variants may continue to suppress travel
- Once COVID is "managed" destinations around the world will target the U.S. traveler

U.S. travel to Hawai'i is rebounding

- With virtually no international visitors for the last 2 years, the U.S. market has provided increased economic impact
- 2021 total expenditures: \$12.2 billion vs. \$11.6 billion in 2019 (+5.1%)
- 2021 per person per day (PPPD) spending: \$199.7 vs. \$188.3 in 2019 (+6.1%)

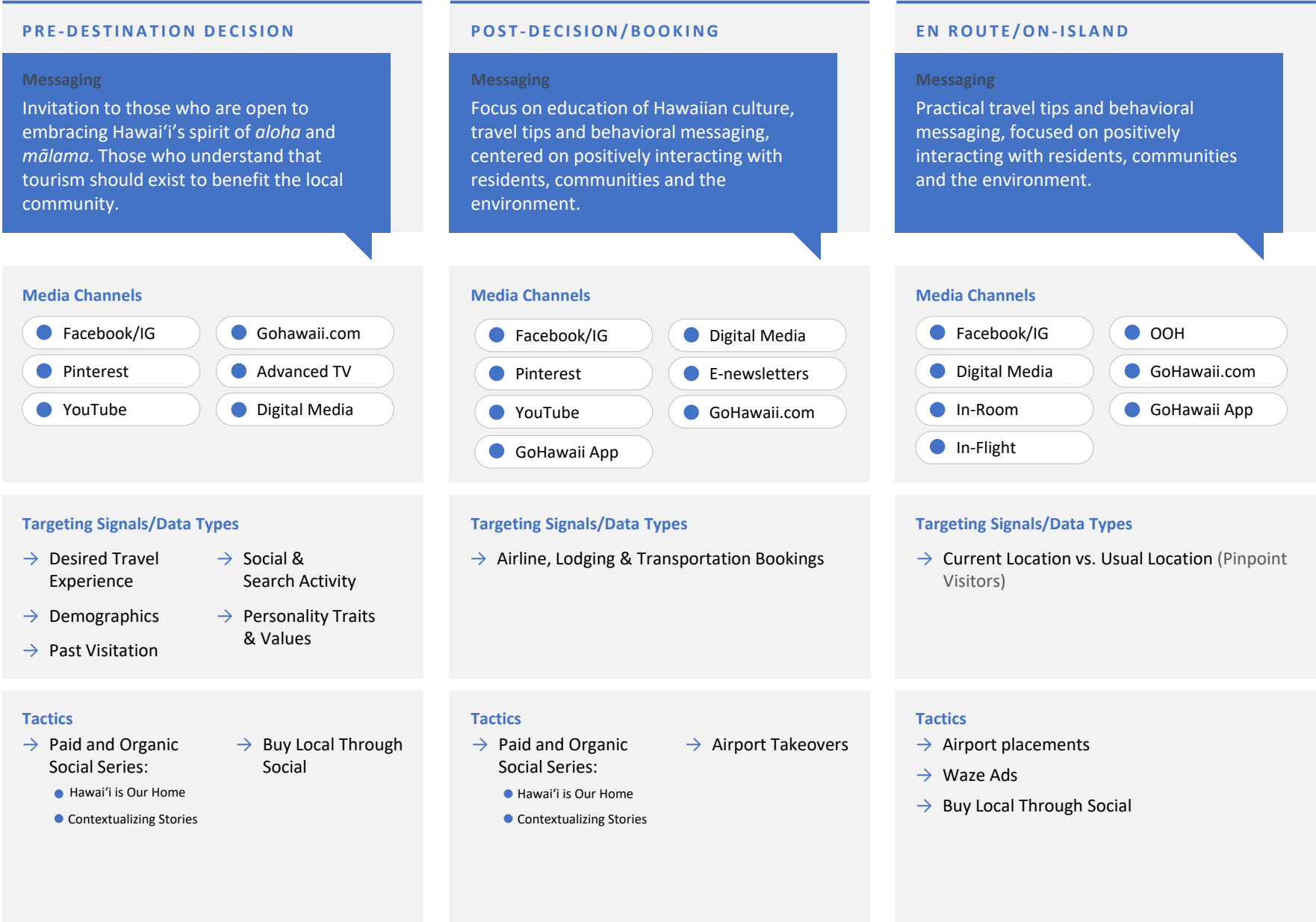
TARGET AUDIENCE

TARGET AUDIENCE

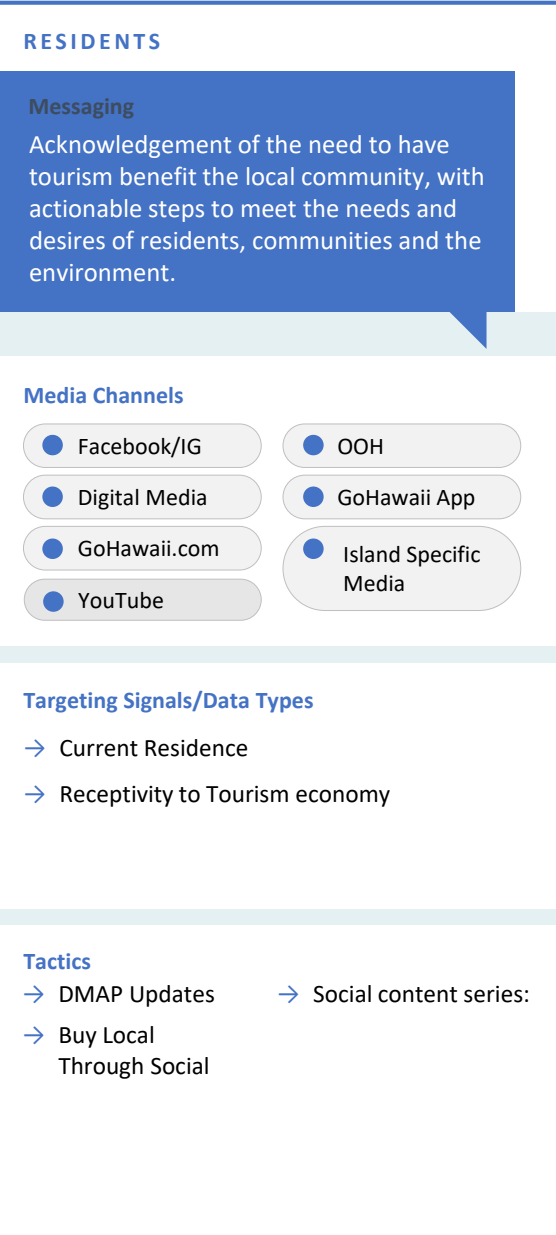


- **Mindful Hawai'i Target Traveler**
 - Pre-destination decision
 - Post-destination decision
- **Hawai'i Residents**

Mindful Hawai'i Target Traveler



Residents of Hawai'i



2022 STRATEGY



Destination Management & Regenerative Tourism

STRATEGY

Marketing, aligned with destination management and economic development, plays a more important role than ever before in helping shape a bright future for our residents, the tourism industry of Hawai'i and our visitors.

In fact, marketing must play a catalytic role in evolving tourism in Hawai'i so it has a positive impact for our communities, on the natural environment and with the traveler.

It's time to flip the tourism equation, from residents as the denominator, to residents as the numerator.

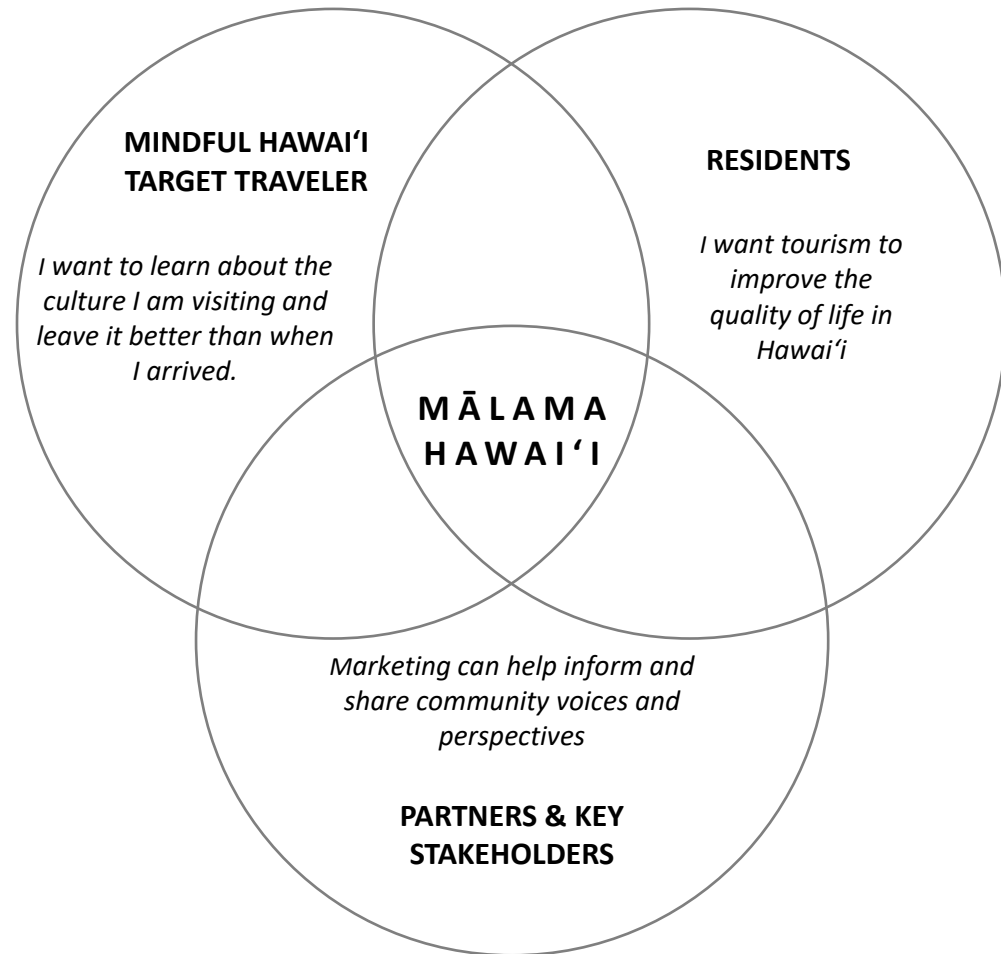
A NEW ERA OF REGENERATIVE TOURISM MARKETING AND MANAGEMENT FOR HAWAI'I



STRATEGY

To achieve this, we must come together with a shared *kuleana* and a singular message strategy that is more important now than ever before:

Mālama Hawai'i



KEY CAMPAIGNS/PROGRAMS



Reactions to Mālama Hawai'i Videos

BRANDING AND MARKETING - PRE-DESTINATION DECISION

Shape visitor perception and rebuild trust with residents.

—

AUDIENCE

MINDFUL HAWAII TARGET TRAVELERS
HAWAII RESIDENTS

DIGITAL + SOCIAL

Mālama Hawai'i

The changing landscape of tourism created an opportunity to rethink the role of tourism in Hawai'i. The target audience was analyzed to identify and message the more mindful traveler – those who were likely to follow community values and were ready to give back. Based on years of research on Hawai'i's target audience, HTUSA has gained an understanding of how to engage viewers. Using a wide, beautiful and natural setting as the opening shot of content engages viewers, and then we allowed volunteer organizations to share their stories of Mālama Hawai'i. Video content was created to highlight people in the community who are working to regenerate their Island home, and invited visitors to support their causes, with the desire to have residents and visitors working together shoulder to shoulder.



AHUPUA'A:
from *mauka*
to *makai*

the
HAWAIIAN
ISLANDS



"Mabalo for respecting our
traditions, and making them
a part of your journey."

— MĀLAMA —
HAWAI'I

Take a trip that gives back.
To Hawai'i. And to you.

the
HAWAIIAN
ISLANDS

LEARN MORE



DIGITAL + SOCIAL

Hero Content: Hawai'i is Our Home

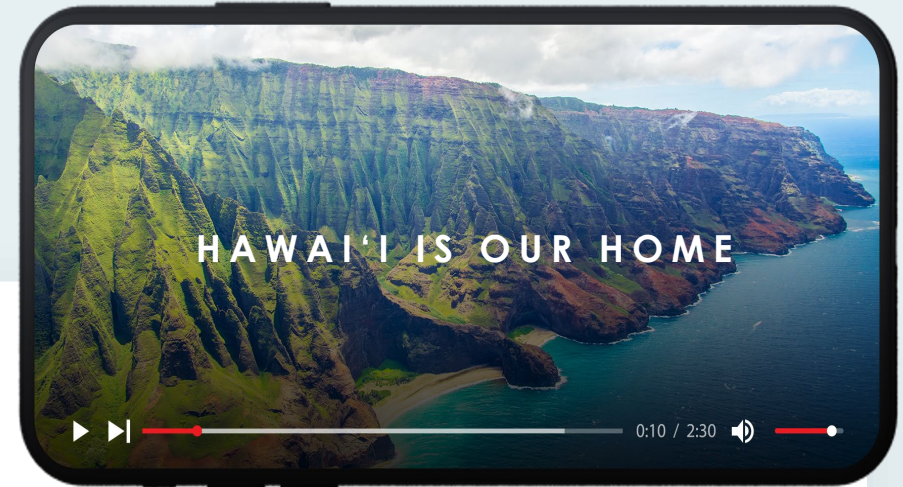
A new story is needed for visitors. One that helps them better understand the place they are visiting, and their role in shaping its future.

A new anthem video for the islands – Hawai'i is Our Home – will visualize the impact of visitors – good and bad – on Hawai'i's future. Good behavior will be encouraged while also clearly explaining the negative behaviors that are off-limits, e.g., touching wildlife and venturing onto private land or sacred sites – with specific content gleaned from DMAP sub-action items.

This new video will be launched and distributed similarly to the highly successful and impactful Share Aloha, with marquee paid placements, organic social, and a short paid series.

ASSETS:

1 hero video; 9:16 Reels, Facebook; 16:9 YouTube
2 Paid ad videos



Script

There is no place like Hawai'i.

Home to unimaginable beauty from *ma uka* [from the mountains] to *ma kai* [to the sea], the land, waters, and living things that inhabit Hawai'i are found nowhere else in the world.

Hawai'i is also home to our '*ohana* [family] of residents. People who have stewarded the islands for generations – united by a deep *kuleana* [privilege, responsibility] to *mālama 'āina* [care for the land].

This *kuleana* to preserve and protect Hawai'i, is at the heart of our culture. And as guests in our home, we ask that you share that *kuleana* during your stay.

This means coming to Hawai'i with an open heart and open mind.

Getting to know our stories, before posting yours.

It means admiring marine life from a distance, treading carefully on clearly marked trails, and respecting our sacred sites – so that our home and our stories will live on for future generations.

It means that when you visit Hawai'i you share *aloha*, before expecting it. When you experience what it means to care for our islands, your visit will be even more meaningful.

Mahalo for joining us in our *kuleana* to *mālama* Hawai'i.

Learn how you can *mālama* Hawai'i during your stay at malamahawaii.com.

DIGITAL + SOCIAL

Contextualizing our Stories on Social

A suite of organic and paid contextually relevant assets will distribute key messaging across platforms to continue intercepting audiences where they are seeking travel and tourism inspiration prior to booking, and also in the post-booking but pre-arrival window when visitors would have heightened receptivity.



BRANDING AND MARKETING: POST-DESTINATION DECISION

Shape pre-arrival intent and on- island behavior.

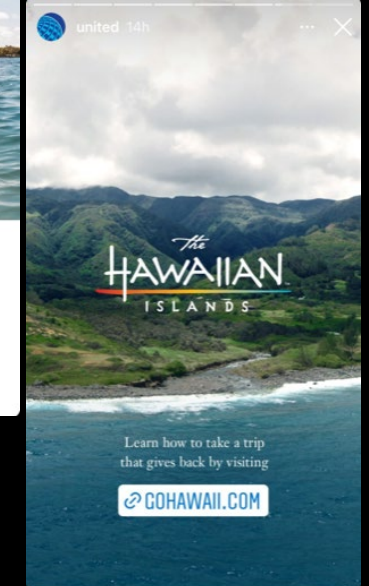
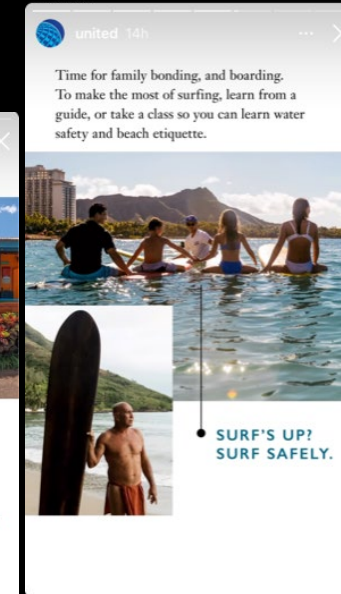
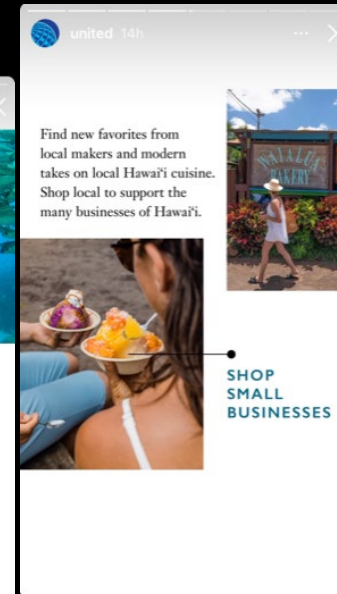
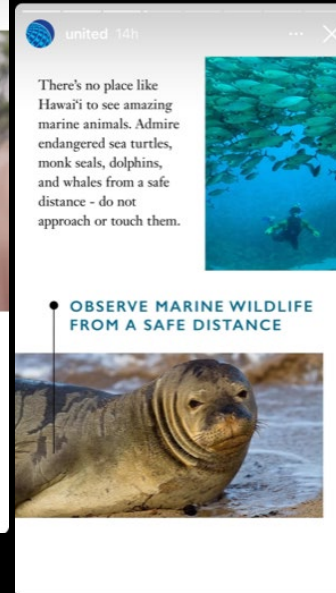
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AUDIENCE

MINDFUL HAWAII TARGET TRAVELERS
HAWAII RESIDENTS


UNITED AIRLINES

Instagram Takeover



ALASKA AIRLINES

Confirmation Email



Hi, Daniel
MVP Gold xcc0184

!

Special travel instructions apply at multiple airports in your itinerary. Please visit alaskaair.com/advisory for more information.

!


Special travel instructions apply at multiple airports in your itinerary. Please visit alaskaair.com/advisory for more information.

✈

Masks required—even when vaccinated.

- Federal law requires all guests 2 years and older wear a mask over their nose and mouth at all times for the duration of travel.
- Refusing to wear a mask or comply with crew instructions may result in denial of boarding, removal from the aircraft, and/or penalties under federal law.
- [Learn more](#) about mask requirements.


**Your trip,
from takeoff
to touch down.**

 817

Seat **17D**

Confirmation code:
ABNSZW

9:50 AM
LAX
Los Angeles




2:00 PM
HNL
Honolulu

Departure
01/02/2022

Arrival
01/02/2022





[See trip details.](#)




Be a mindful traveler.

As we welcome guests to Hawai'i, we're making sure that *mālama*—"to care for" in Hawaiian—is top of mind. As part of our commitment to keep the Aloha State healthy and vibrant, we've partnered with travel2change to inspire guests to leave the Islands better than when they arrived.

[LEARN MORE](#)

travel2change Type or select   Map  Calendar  About



Alaska AIRLINES + **travel2change**

LEAVE A POSITIVE IMPACT - JOIN A TRAVEL2CHANGE ACTIVITY TODAY OR DONATE NOW.

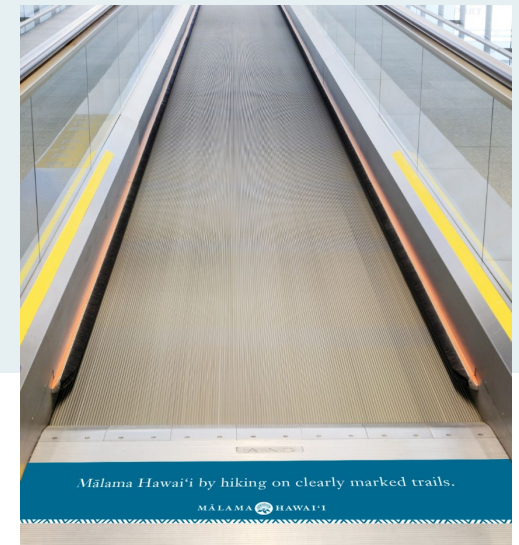
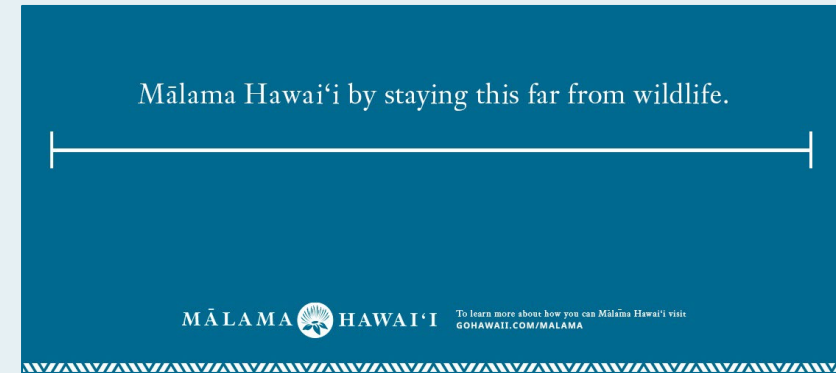
[Book Now](#)

PAID MEDIA

Airport Education

Through marquee airport real estate takeovers, both in Hawai'i and the continental U.S., visitors who travel to and from the Hawaiian Islands will be intercepted with impactful creative that is impossible to ignore.

These placements will deliver clever and compelling messaging to educate visitors on how to *mālama* Hawai'i, e.g., respecting wildlife and staying on clearly marked trails.

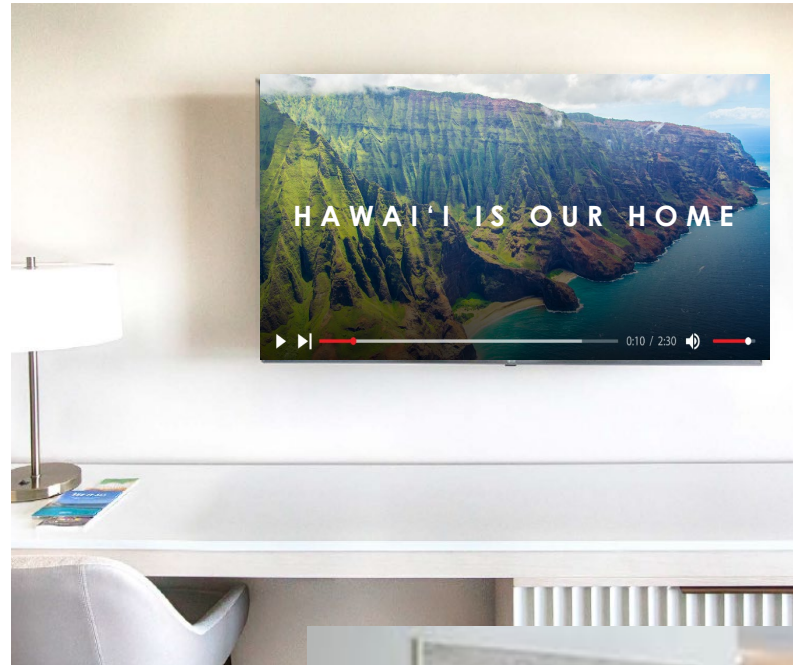


PAID MEDIA

In-Room Video

Channels: Real Hawai'i TV (O'ahu), Hoku TV (O'ahu, Maui, Hawai'i Island, Kaua'i), Outrigger TV (O'ahu, Hawai'i Island), Elevate TV (O'ahu), Living TV (O'ahu)

60-second video



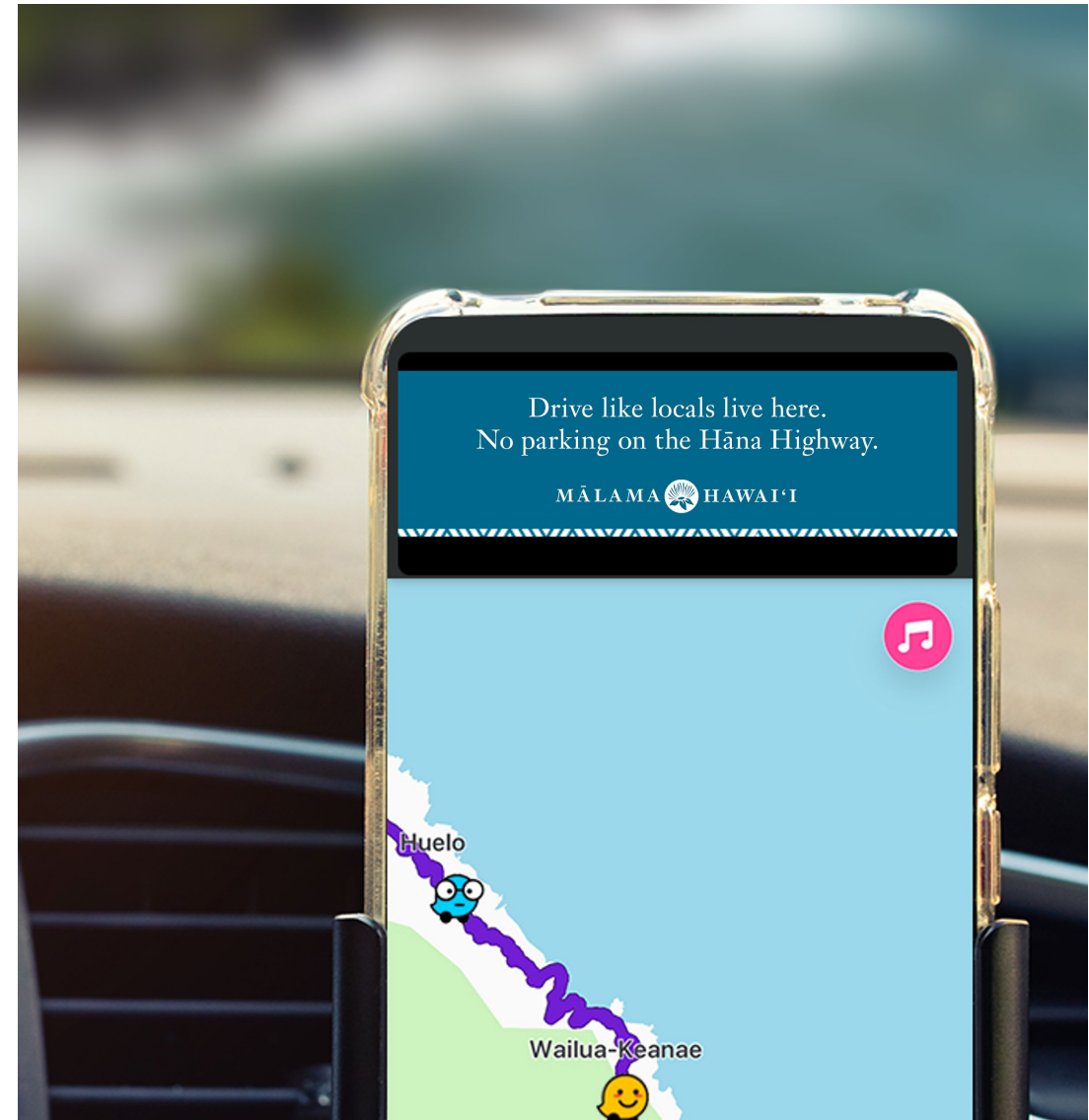
PAID MEDIA

Target On-Island Arrivals

Every visitor is using mobile apps, e.g., Waze, to navigate their way around each island, which makes those apps an impactful tool to geotarget audiences with the exact Mālama Hawai'i messages they need to hear, right where they are and directly on their mobile device. Sites and desired conditions will be identified by the DMAPs.

Executions could include:

- Share *aloha* from afar. Mahalo for keeping a safe distance from wildlife.
- Mahalo for driving safely and with *aloha*.
- Before you check in, check out local small businesses.



BRANDING AND MARKETING: POST-DESTINATION DECISION

Implement regenerative tourism efforts for all incoming travelers.

AUDIENCE

MINDFUL HAWAII TARGET TRAVELERS
HAWAII RESIDENTS

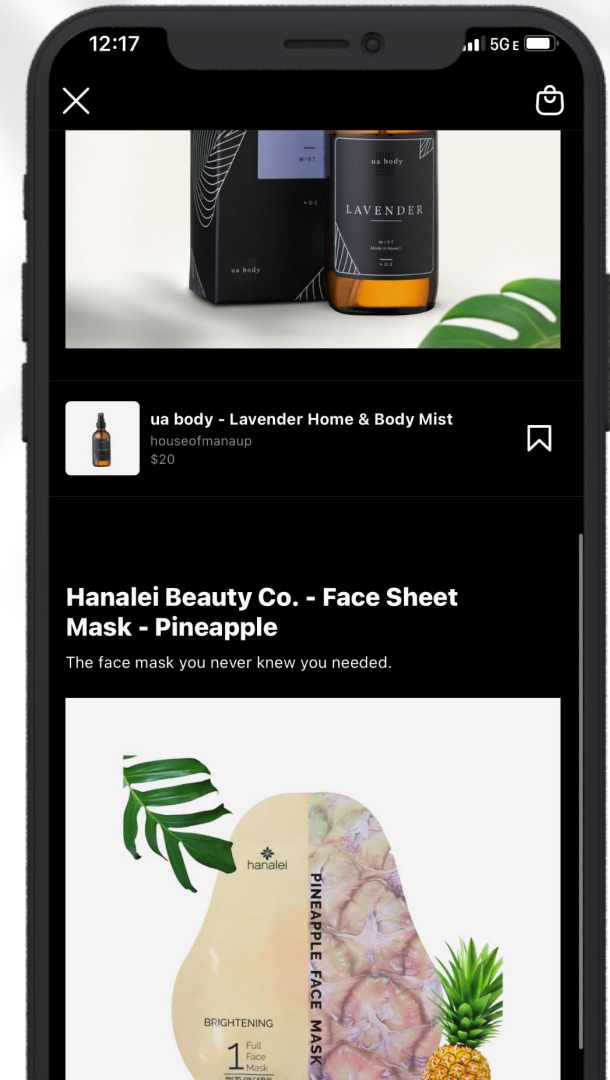
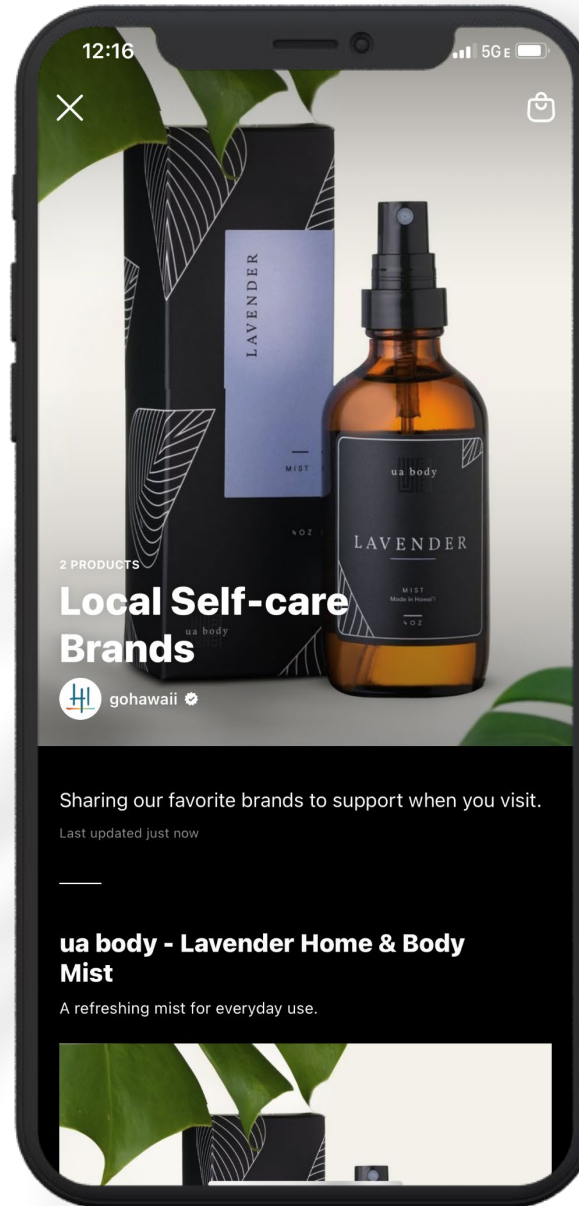
RESIDENT + COMMUNITY SPOTLIGHT

Buy Local Through Social

To directly and tangibly support local businesses and promote Hawai'i made products, we will curate Instagram Guides and Pinterest Board content for local Hawai'i artisans and products, driving to their online shops or where to buy in store. Local influencers will also be engaged to share their favorite local brands via Instagram Story stickers and Instagram Live.

Editorialized social story formats will feature the unique stories of business owners and makers, and their deep connection to their community and Hawaiian culture. Influential tastemakers can share out their favorite local brands, with stickers and links to purchase.

Additionally, HTUSA will further support the success of local businesses by hosting free workshops for all business partners on social media best practices and social e-commerce opportunities.



Concepts and suggested brands and ambassadors are strictly for illustrative purposes.

STRATEGY – PUBLIC RELATIONS

- Coordinated Statewide Effort
- Messaging Focus: Mālama Hawai‘i, Kuleana, Destination Management
- PR Team: Immersed in DMAP priorities, conduit for newsworthy stories and key ambassadors
 - DMAP, Community Enrichment, Kūkulu Ola, Aloha ‘Āina, Mālama Hawai‘i Program
- National Earned: Engage and educate Hot 100 Media
- Local Earned: Share progress and DMAP success stories targeting hyper-local media



SFGATE

‘We have to manage visitor impacts’: More Hawaii tourist hotspots will soon require reservations

Christine Hitt, SFGATE
Dec. 2, 2021

NEWS POLITICS U.S. NEWS OPINION COVID-19 WORLD BUSINESS PODCASTS WATCH 12/23

Malama Hawaii: A new travel program for tourists to give back

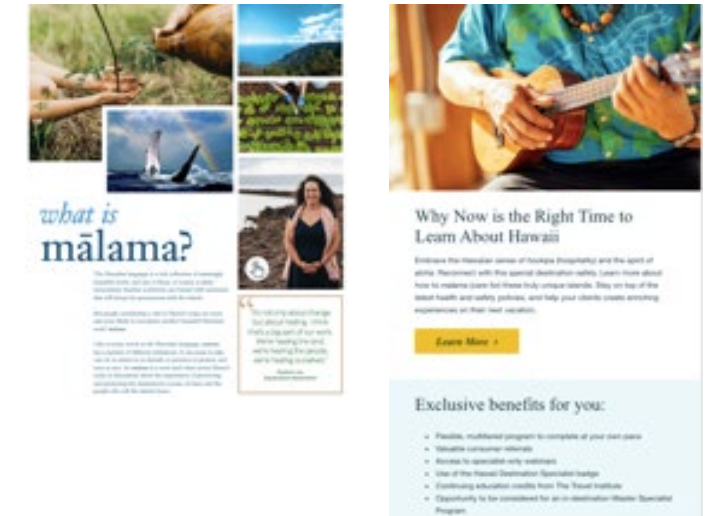
Visitors who book a Malama Hawaii package can earn a free hotel night or other special discount in return.



STRATEGY – TRAVEL TRADE

HTUSA travel trade strategy is to align with select travel partners and advisors who deliver the MHTT and cultivate them as advocates for mindful travel to Hawai'i through education. This will be accomplished through:

- In-Person, Virtual and On-Demand Training
 - Participate in consortia and wholesale in-person and virtual events and conduct on-going webinars
 - Conduct HTUSA in-person sales blitz events and record for on-demand viewing
 - Create a webinar library on travel agent portal for access 24/7
- Content Updates & Development
 - Update E-xpressly for Travel Professionals (EXTP) email and current travel agent portal and create Mālama Hawai'i landing page
 - Revise Hawai'i Destination Specialist (HDS) curriculum incorporating Mālama messaging
- Communications
 - Utilize HDS database to communicate the importance of encouraging clients to travel mindfully
 - Execute a trade media strategy that efficiently reaches qualified travel advisors encouraging HDS course completion
 - Invest in acquisition programs that attract new travel sellers that reach the MHTT



BRANDING AND MARKETING: HAWAII RESIDENTS

Communicate how DMAP initiatives benefit Hawai'i Residents.

AUDIENCE

HAWAII RESIDENTS

DMAP PROCESS



PERFORMANCE MEASURES

PERFORMANCE MEASURES

	Annual Target	Semi-Annual Targets	
	2022	Jan-Jun	Jul-Dec
Consumer Paid Media Measures			
TV Reach		4.0%	
Print Circulation		n/a	
Digital Reach		7.0%	
Radio Reach		n/a	
Out of Home Reach		n/a	
TV Impressions		n/a	
Print Impressions		n/a	
Digital Impressions		67,833,333	
Digital Video Impressions*		29,080,000	
Radio Impressions		n/a	
Out of Home Impressions		n/a	
Travel Trade Paid Media Measures			
Print Circulation		n/a	
Digital Reach		16%	
Print Impressions		n/a	
Digital Impressions		7,000,000	
Public Relations Measures			
No. of Media/PR Calls		112	
No. of Press Releases Issued		17	
Print Publicity Value - Paid	NA - accounted for under Consumer Paid Media Measures		
Digital Publicity Value - Paid			
Broadcast Publicity Value - Paid			
Print Impressions - Paid			
Digital Impressions - Paid			
Broadcast Impressions - Paid			
Print Publicity Value - Earned		\$125,160,000	
Digital Publicity Value - Earned		\$150,318,750	
Broadcast Publicity Value - Earned		\$129,131,250	
Print Impressions - Earned		823,750,000	
Digital Impressions - Earned		300,192,000,000	
Broadcast Impressions - Earned		3,588,000,000	
No. of Group Media FAMs		2	
No of Articles Generated from Group Media FAMs		6	
No. of Individual Press Trips		27	
No of Articles Generated from Individual Press Trips		32	
Consumer Shows			
No. of Shows		n/a	
Show Attendance		n/a	

	Annual Target	Semi-Annual Targets	
	2022	Jan-Jun	Jul-Dec
Travel Trade			
No. of Meetings with Travel Trade Partners		10	
No. of Travel Trade Partners Met With		40	
No. of Trade Shows		15	
Trade Show Attendance		1,690	
No. of Trade Show Appointments		93	
No. of Travel Trade FAMs		1	
No. of Travel Trade FAM Participants		10	
No. of Trade Education Sessions		29	
No. of Trade Education Participants		2,150	
No. of Agents Completed Training Program		2,650	
Social Media Metrics			
FACEBOOK			
Total Impressions Gained		61,907,513	
Total Interactions Gained		4,297,361	
Total Fan Count**		2,381,543	
Increase in Fans**		(8,047)	
Total Posts		24	
Total Estimated Ad Recall (People)*		111,009	
Total Reach*		9,254,638	
INSTAGRAM			
Total Impressions Gained		15,864,699	
Total Interactions Gained		1,644,105	
Total Fan Count		337,632	
Increase in Fans		5,100	
Total Posts		33	
Total Estimated Ad Recall (People)*		56,499	
Total Reach*		4,324,906	
PINTEREST			
Total Impressions Gained***		21,145,428	
Total Interactions Gained***		10,660,867	
YOUTUBE			
Total TrueView Views Gained***		33,540,297	
Total Bumper Ad Impressions Gained***		17,040,695	
WAZE			
Total Impressions Gained***		1,281,645	
DMAP Measures			
No. of DMAP Action Items Supported		2,362	
No. of Initiatives to Promote Hawai'i Made Products		288	
No. of Hawai'i Festivals & Events Promoted		364	
No. of Voluntourism Programs Promoted		319	
Hawai'i Paid Media Measures			
Digital Reach****		15%	
Out of Home Reach****		58%	
Digital Video Impressions****		5,124,000	
Out of Home Impressions****		18,108,198	



**Facebook fan count is projected to decline over the next three years resulting from platform competition, politics and related boycotts of Facebook, as well as regular removal of bot/inactive accounts.

***New recommended KPI metrics to measure HTUSA Pinterest, YouTube and WAZE

****Paid media deliveries are estimated for BMMP submission without buys yet negotiated.

PARTNERSHIP OPPORTUNITIES

PARTNERSHIP OPPORTUNITIES

ACTIVITY	DATE	DESCRIPTION	LOCATION	COST	CONTACT
CONSUMER PROMOTIONS					
Mālama Hawai'i Program	Jan-Jun	Visitors are encouraged to give back to the destination by participating in the Mālama Hawai'i Program. The U.S. brand media campaign call-to-action drives to gohawaii.com/malama, which lists volunteer opportunities and offers.	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	\$0	Lei-Ann Field lfield@hvcb.org
Statewide Digital Cooperative Marketing Program	Spring	A tactical, digital cooperative marketing program for the destination will drive business from top markets in Q2-Q3. Partnership opportunities are available at various tiered participation levels.	U.S.	Varies	Gina Chun gchun@hvcb.org
Hawai'i Statewide Official Visitors' Guide	Annual	The Hawai'i Statewide Official Visitors' Guide is the HVCB destination planner produced in both digital and print formats. Qualified distribution is targeted digitally to the proprietary consumer database and modeled Hawai'i lookalike audience, as well as to the travel trade database and to fulfill requests from gohawaii.com and agents.gohawaii.com. Advertising opportunities are available at various participation levels.	U.S.	Varies	HVCB Membership: membership@hvcb.org

PARTNERSHIP OPPORTUNITIES

ACTIVITY	DATE	DESCRIPTION	LOCATION	COST	CONTACT
TRADE SHOWS					
Travel Trade Leisure Sales Blitz	May 16-19	Live, in-person training for travel advisors will be held in four U.S. West markets. Evening sessions will include a Hawai'i supplier trade show, supplier tote bag (sharing locally made products and providing an opportunity to include supplier product information); live Hawaiian music and hula performances, networking, dinner and 5-minute on-stage supplier presentations.	Seattle, WA Sacramento, CA San Francisco, CA Orange County, CA	Varies: \$500-\$1,000 per show Partner travel costs on own	Erica Neves eneves@hvcb.org
TRADE FAMILIARIZATION TRIPS (FAMS)					
Due to the current COVID-19 landscape, Master Specialist FAMs have been postponed until Fall 2022.					
TRAVEL TRADE EDUCATION					
Enewsletter: E-xpressly for Travel Professionals	Monthly	The enewsletter for travel professionals offers partners a chance to reach up to 60,000 opted-in travel agents and travel industry subscribers. Advertising opportunities are available.	U.S.	Varies	HVCB Membership Department: membership@hvcb.org
Enewsletter: News, Updates & Aloha from O'ahu	Q1, Q2	O'ahu enewsletter for travel professionals targets advisors who have specifically requested information and updates for O'ahu. Partners submit news/updates to be considered for inclusion.	U.S.	\$0	Joyce Bernardo joyce@visit-oahu.com

MAHALO PIHA!