January – June 2022 BMMP

HTA Winter Tourism Update
2.9.2022

Jay Talwar
Chief Marketing Officer
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
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%)

Source: Air Seats HTUSA Analysis of DIIO mi
TARGET AUDIENCE
TARGET AUDIENCE

- Mindful Hawaiʻi Target Traveler
  - Pre-destination decision
  - Post-destination decision

- Hawaiʻi Residents
Mindful Hawai‘i Target Traveler

**PRE-DESTINATION DECISION**

**Messaging**
Invitation to those who are open to embracing Hawai‘i’s spirit of *aloha* and *mālama*. Those who understand that tourism should exist to benefit the local community.

**Media Channels**
- Facebook/IG
- Pinterest
- YouTube
- Advanced TV
- Digital Media

**Targeting Signals/Data Types**
- Desired Travel Experience
- Demographics
- Past Visitation
- Social & Search Activity
- Personality Traits & Values

**Tactics**
- Paid and Organic Social Series:
  - Hawai‘i is Our Home
  - Contextualizing Stories
- Buy Local Through Social

**POST-DECISION/BOOKING**

**Messaging**
Focus on education of Hawaiian culture, travel tips and behavioral messaging, centered on positively interacting with residents, communities and the environment.

**Media Channels**
- Facebook/IG
- Digital Media
- Pinterest
- E-newsletters
- YouTube
- GoHawaii.com
- GoHawaii App

**Targeting Signals/Data Types**
- Airline, Lodging & Transportation Bookings
- Personality Traits & Values
- Past Visitation
- Social & Search Activity

**Tactics**
- Paid and Organic Social Series:
  - Hawai‘i is Our Home
  - Contextualizing Stories
- Airport Takeovers
- Buy Local Through Social

**EN ROUTE/ON-ISLAND**

**Messaging**
Practical travel tips and behavioral messaging, focused on positively interacting with residents, communities and the environment.

**Media Channels**
- Facebook/IG
- Digital Media
- OOH
- GoHawaii.com
- In-Room
- GoHawaii App
- In-Flight

**Targeting Signals/Data Types**
- Current Location vs. Usual Location (Pinpoint Visitors)
- Personality Traits & Values
- Past Visitation
- Social & Search Activity

**Tactics**
- Airport Takeovers
- Waze Ads
- Buy Local Through Social

**Residents of Hawai‘i**

**Messaging**
Acknowledgement of the need to have tourism benefit the local community, with actionable steps to meet the needs and desires of residents, communities and the environment.

**Media Channels**
- Facebook/IG
- OOH
- Digital Media
- GoHawaii App
- GoHawaii.com
- Island Specific Media

**Targeting Signals/Data Types**
- Current Residence
- Receptivity to Tourism economy

**Tactics**
- DMAP Updates
- Social content series:
  - Buy Local Through Social
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

MĀLAMA HAWAI‘I
Overarching creative campaign and call-to-action for all visitors, residents and partners.

KULEANA
On-island initiatives informed by resident and community voices to educate and shape behavior.

LISTENING & TAKING ACTION
DMAP, Community Enrichment, Kūkulu Ola, and Aloha ‘Āina Programs
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 Hawaiʻi
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 HAWAI'I TARGET TRAVELERS
HAWAI'I RESIDENTS
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.
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.

To “talk story” in Hawaiian tradition is a chance to slow down and exchange conversation with one another. And that’s exactly what sharing stories should be: reciprocal. When you visit, we ask that you take the time to get to know our community and culture through conversation. Because our stories are deeper than what you see in your feed.

Hawaii is more than your vacation destination. It is our home, and each of us have a kuleana (responsibility) to protect and preserve the islands when visiting.
BRANDING AND MARKETING: POST-DESTINATION DECISION

Shape pre-arrival intent and on-island behavior.

AUDIENCE

MINDFUL HAWAI'I TARGET TRAVELERS
HAWAI'I RESIDENTS
UNITED AIRLINES

Instagram Takeover

Aloha, Hawai‘i.

©GOHAWAII is taking over our Instagram Stories for the day to share their tips for your trip to paradise.

Coming to Hawai‘i?

GOHAWAII is here to share their top tips for traveling to Hawai‘i.

Let Locals Be Your Guide

Find a deeper connection with Hawai‘i by seeking experiences with local guides who can share the history of our culture.

Observe marine wildlife from a safe distance

There's no place like Hawai‘i to see amazing marine animals. Adopt protocols—turtles, monk seals, dolphins, and whales from a safe distance—do not approach or touch them.

Shop small businesses

Find new favorites from local makers and modern takes on local Hawai‘i cuisine. Shop local to support the many businesses of Hawai‘i.

Surf's up! Surf safely!

Time for family bonding and building. To make the most of surfing, learn from a guide, or take a class so you can learn water safety and beach etiquette.
ALASKA AIRLINES

Confirmation Email

Your trip, from takeoff to touch down.

Confirmation code: ABNSZW

3:00 AM
LAX
Los Angeles

2:00 PM
HNL
Honolulu

01/02/2022
01/02/2022

Be a mindful traveler.

As we welcome guests to Alaska, we’re making sure that we’re doing our part to protect the beauty of our state. We’ve partnered with travel2change to inspire guests to lessen the impact they leave behind.

LEARN MORE
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.
Implement regenerative tourism efforts for all incoming travelers.

AUDIENCE: MINDFUL HAWAI'I TARGET TRAVELERS
HAWAI'I 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 Hawaiʻi, Kuleana, Destination Management

● PR Team: Immersed in DMAP priorities, conduit for newsworthy stories and key ambassadors
  ○ DMAP, Community Enrichment, Kūkulu Ola, Aloha ʻĀina, Mālama Hawaiʻi Program

● National Earned: Engage and educate Hot 100 Media

● Local Earned: Share progress and DMAP success stories targeting hyper-local media
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: HAWAI‘I RESIDENTS

Communicate how DMAP initiatives benefit Hawai‘i Residents.
DMAP PROCESS

- Community Issues
- DMAP Steering Committee
- Anchor Actions
- Island Chapter Destination Managers
- Marketing Communications (local and national)
PERFORMANCE MEASURES
**PERFORMANCE MEASURES**

### Annual Target

<table>
<thead>
<tr>
<th>Consumer Paid Media Measures</th>
<th>2022</th>
<th>Jan-Jun</th>
<th>Jul-Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV Reach</td>
<td>4.3%</td>
<td></td>
<td></td>
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<tr>
<td>Print Circulation</td>
<td>NA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital Reach</td>
<td>7.4%</td>
<td></td>
<td></td>
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<tr>
<td>Radio Reach</td>
<td>NA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Out of Home Reach</td>
<td>NA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TV Impressions</td>
<td>NA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print Impressions</td>
<td>NA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital Impressions</td>
<td>67,833,333</td>
<td></td>
<td></td>
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<tr>
<td>Digital Video Impressions**</td>
<td>29,080,000</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Travel Trade Paid Media Measures</th>
<th>2022</th>
<th>Jan-Jun</th>
<th>Jul-Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Circulation</td>
<td>NA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital Reach</td>
<td>16%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print Impressions</td>
<td>NA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital Impressions</td>
<td>7,000,000</td>
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</table>

### Public Relations Measures

<table>
<thead>
<tr>
<th>NA - accounted for under Consumer Paid Media Measures</th>
</tr>
</thead>
</table>

### 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

### 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 |

| No. of Articles Generated from Group Media FAM | 6 |
| No. of Individual Press Trips | 35 |
| No. of Articles Generated from Individual Press Trips | 35 |
| Consumer Shows | No. of Shows | 1,684,000,000 |

| Total TrueView Views Gained*** | 33,540,297 |
| Total Bumper Ad Impressions Gained*** | 17,040,695 |

### 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 ShowAppointments | 3,588,000,000 |
| No. of Trade ShowAttendees | 3,588,000,000 |
| No. of Trade ShowParticipants | 3,588,000,000 |
| No. of Trade ShowExhibitors | 3,588,000,000 |
| No. of Trade ShowExhibitation | 3,588,000,000 |
| No. of Trade ShowParticipants | 3,588,000,000 |

**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 inactive accounts.

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

**Paid media deliverables are estimated for BMMP submission without buys yet negotiated.
PARTNERSHIP OPPORTUNITIES
# PARTNERSHIP OPPORTUNITIES

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>DATE</th>
<th>DESCRIPTION</th>
<th>LOCATION</th>
<th>COST</th>
<th>CONTACT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CONSUMER PROMOTIONS</strong></td>
<td></td>
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</tr>
<tr>
<td>Mālama Hawai‘i Program</td>
<td>Jan-Jun</td>
<td>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/molama, which lists volunteer opportunities and offers.</td>
<td>Kaua‘i, O‘ahu, Maui, Moloka‘i, Lāna‘i, Island of Hawai‘i</td>
<td>$0</td>
<td>Lei-Ann Field <a href="mailto:lfield@hvcb.org">lfield@hvcb.org</a></td>
</tr>
<tr>
<td>Statewide Digital Cooperative Marketing Program</td>
<td>Spring</td>
<td>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.</td>
<td>U.S.</td>
<td>Varies</td>
<td>Gina Chun <a href="mailto:gchun@hvcb.org">gchun@hvcb.org</a></td>
</tr>
<tr>
<td>Hawai‘i Statewide Official Visitors’ Guide</td>
<td>Annual</td>
<td>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.</td>
<td>U.S.</td>
<td>Varies</td>
<td>HVCB Membership: <a href="mailto:membership@hvcb.org">membership@hvcb.org</a></td>
</tr>
</tbody>
</table>
# PARTNERSHIP OPPORTUNITIES

## TRADE SHOWS

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>DATE</th>
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<th>LOCATION</th>
<th>COST</th>
<th>CONTACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Trade Leisure Sales Blitz</td>
<td>May 16-19</td>
<td>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.</td>
<td>Seattle, WA; Sacramento, CA; San Francisco, CA; Orange County, CA</td>
<td>Varies: $500-$1,000 per show; Partner travel costs on own</td>
<td>Erica Neves <a href="mailto:eneves@hvcb.org">eneves@hvcb.org</a></td>
</tr>
</tbody>
</table>

## TRADE FAMILIARIZATION TRIPS (FAMS)

Due to the current COVID-19 landscape, Master Specialist FAMs have been postponed until Fall 2022.

## TRAVEL TRADE EDUCATION

<table>
<thead>
<tr>
<th>ACTIVITY</th>
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<th>LOCATION</th>
<th>COST</th>
<th>CONTACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enewsletter: E- expressly for Travel Professionals</td>
<td>Monthly</td>
<td>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.</td>
<td>U.S.</td>
<td>Varies</td>
<td>HVCB Membership Department: <a href="mailto:membership@hvcb.org">membership@hvcb.org</a></td>
</tr>
<tr>
<td>Enewsletter: News, Updates &amp; Aloha from O'ahu</td>
<td>Q1, Q2</td>
<td>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.</td>
<td>U.S.</td>
<td>$0</td>
<td>Joyce Bernardo <a href="mailto:Joyce@visit-oahu.com">Joyce@visit-oahu.com</a></td>
</tr>
</tbody>
</table>
MAHALO PIHA!