



*The Hawai'i Visitors and Convention Bureau*

# 2006 ANNUAL TOURISM MARKETING PLAN SUMMARY



*North America Leisure*

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## **OBJECTIVES & MARKETING DIRECTION**

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### **Business Objectives**

The Hawai'i Tourism Authority (HTA) has three business objectives that underlie all of its marketing efforts:

- Increase person per day spending
- Increase length of stay
- Increase arrivals during key shoulder periods

### **Marketing Direction**

In addition, in its 2006-2015 strategic plan, the HTA specified strategic directions to support their business objectives.

- Narrowly target marketing efforts with a focus on Hawai'i's best prospects to counter our competitors' larger marketing budgets
- Provide for stability in the visitor industry
- Coordinate statewide and island specific marketing efforts
- Increase business visitor expenditures as a percentage of total visitor expenditures

### **HVCB Scope**

It is within this context that the Hawai'i Visitors and Convention Bureau (HVCB), made up of a Central organization and four Island Chapters, acts as the State of Hawai'i's marketing organization for the North America leisure and global Corporate Meetings and Incentives (CMI) markets. In addition, the Island Chapters are also responsible for marketing their islands worldwide.

## ***MARKET SITUATION***

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### **North America Tourism**

Surging back to life in 2004, the U.S. travel and tourism industry largely cleared its post 9/11 recovery phase, and is expected to continue growing in 2005 and 2006 – albeit at a slower rate. According to the Travel Industry Association of America, domestic person trips are forecasted to rise 1.7 percent in 2006, following slightly higher gains in 2004 (+3.0%) and 2005 (projected at +2.0%).

### **U.S. Economy**

Rising fuel prices aside, a stable U.S. economy provides the stage upon which Americans are once again taking to the skies, highways and byways to satisfy pent-up travel demand. The Conference Board has forecast a 3.6 percent increase in real U.S. GDP for 2006, following a projected 4.4 percent rise in 2005.

### **Hawai'i Tourism**

Hawai'i's domestic arrivals soared to record levels in 2004, and have continued to run at record levels through the first quarter of 2005. Many factors have contributed to the state's rapid growth, including a significant increase in domestic airlift to Hawai'i, the state's image as a safe, domestic (yet exotic) destination, unique Hawaiian culture and scenic beauty, pent-up travel demand, and a cruise industry currently riding a wave of growth.

### **Cruise Line Industry**

Since July 2004, the state has had a U.S. flagged ship (i.e., Norwegian Cruise Line's Pride of Aloha) home-ported in Hawai'i waters. NCL will home-port a second U.S. flagged ship (Pride of America) in July 2005, and a third (Pride of Hawai'i) in 2006, at which time the three ships combined will bring up to 500,000 visitors and pump an estimated \$500 million annually into the Hawai'i economy.

## **Waikīkī Redevelopment Project**

Changes are taking place in Hawai'i on land as well as at sea. O'ahu is in the midst of major Waikīkī redevelopment. Changes in hotel ownership have lead to renovations at a number of properties -- a move that has resulted in an upgrading of Waikīkī accommodations, higher average daily room rates, and possibly the attraction of a more affluent, higher-spending visitor.

By the end of 2006, another \$549 million in construction (started in 2005) will be completed in Waikīkī, including the first phase of Outrigger Enterprises, Inc.'s Waikīkī Beach Walk Project, upgrading of the Hilton Hawaiian Village Lagoon, and a renovation of the Royal Hawaiian Shopping Center. An additional \$140 to \$150 million is also being invested in a renovation of Waikīkī's International Market Place, which is scheduled for completion in 2008.

## **Hawai'i Lodging and Hospitality**

Simultaneous with the upgrading of Waikīkī retail and hotel offerings, the state is also experiencing growth in its inventory of timeshare and condominium accommodations via a mix of new developments and condo conversions. Timeshare units have grown from six percent of statewide room inventory in 2000, to eight percent in 2004; and account for a significantly larger share of available rooms on the Neighbor Islands (Kaua'i 25%; Big Island 13%; Maui 9%) than on O'ahu (3%). The growing presence of timeshares and condominiums will have an impact, which could result in a marketplace shift toward longer-staying, repeat visitors to the state.

## **Hawai'i Bookings Trends**

Today's consumers are faced with more travel choices and have access to more information than ever before. While the abundance of travel options and information has empowered consumers, the majority of today's travelers continue to rely on travel agents for insights and guidance in planning and booking Hawai'i vacations. According to the state Department of Business, Economic Development, and Tourism (DBEDT), more than one-third (37%) of Hawai'i visitors rely on travel agents as sources of information, and even greater numbers of visitors enlisted the help of travel agents for booking their air travel (76%), hotel arrangements (62%) and rental car (53%).

## **Hawai'i Visitor Profile**

Hawai'i has a diversity of outdoor recreation activities; world-class golf courses, accommodations, resorts, spas and cuisine; and its own unique history, culture, and music that all serve as strong travel motivators for the modern leisure traveler.

The U.S. traveler who visits Hawai'i is an avid traveler; a high-experiential consumer who takes more frequent and further trips than the average traveler, including international destinations, and views travel as an important part of their life and an integral part of their overall lifestyle.

As avid travelers, Hawai'i visitors look to their Hawai'i vacation to make them feel alive, energetic, enriched, romantic, and provide them with an opportunity to gain knowledge of other cultures and take on both low and high risk outdoor adventures.

## **Hawai'i Visitor Satisfaction**

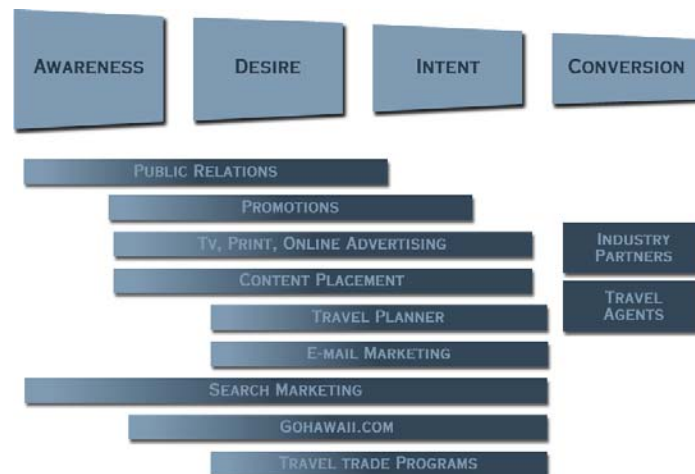
While Hawai'i visitor satisfaction levels continue to run higher than any other U.S. destination, visitor satisfaction research conducted by DBEDT has shown early signs of slipping satisfaction levels. As a result, there is growing concern that the record number of arrivals the destination is experiencing may be taxing the infrastructure (e.g., roads, parks, etc.) as well as affecting service levels.

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## MARKETING OBJECTIVES

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- Increase the number of higher-spending U.S. West (USW), U.S. East (USE), and Canadian travelers intending to visit Hawai'i for their next vacation, as measured by TNS (USW and USE markets); and the Conference Board of Canada (Canadian market).
- Strengthen Hawai'i's brand image among USW and USE long-haul travelers' as measured by key brand attributes in the TNS survey<sup>1</sup>.
- Focus efforts on moving consumers across the marketing continuum by increasing top of mind awareness, desire and intent to visit Hawai'i among potential visitors within our target profile, leaving conversion to the industry. This is tracked by TNS measures of USW/USE travelers considering Hawai'i for their next vacation, and/or planning a vacation in Hawai'i within the next 24 months.



## STRATEGIES

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- Develop critical mass with marketing programs that target a select portfolio of market segments.
- Target marketing programs towards higher-spending, longer staying, high-experiential travelers.
- Leverage programs toward filling-in the spring and fall shoulder seasons.
- Maintain a consistent brand position across all touch points throughout North America. Supplement these efforts in the U.S. East and in Eastern Canada by addressing significant barrier-to-sales issues (time, distance, price) in cooperation with partners' marketing efforts at the conversion end of the marketing continuum.

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<sup>1</sup> Hawai'i Marketing Effectiveness Study, conducted for HTA since 2003 by TNS.

## ***POSITIONING STATEMENTS***

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As the custodian for the statewide Hawai'i brand, HVCB Central provides the umbrella image for the entire state while the Island Chapters – representing Kaua'i, O'ahu, Moloka'i, Lāna'i, Maui, and Hawai'i's Big Island – focus on the individual marketing needs of each island and on promoting the unique visitor experiences they offer. Working in consort, the branding of the entire state is strengthened:

*One brand. Multiple facets. An experience like no other.*

### **HVCB Central**

The statewide Hawai'i brand is positioned as a vacation experience like no other in the world. Discovery, beauty, adventure, romance, and rejuvenation are all enhanced by the one unique attribute no other destination can offer: *aloha*. Market-based research continues to show that Hawai'i is supported by three key pillars of strength that capture the essence of the brand, and that are communicated in statewide messaging for *Hawai'i – The Islands of Aloha*:

- Natural Beauty – The breathtaking natural beauty and clean environment.
- Diversity – The diversity of islands, experiences, and activities.
- Aloha – The Aloha Spirit of the people of Hawai'i.

### **Kaua'i**

Brand positioning for Kaua'i, *Hawai'i's Island of Discovery*, continues to build on the island's pristine natural beauty and diverse range of activities, particularly those appealing to the golf and romance markets. Positioning for Kaua'i reinforces the following strengths:

- Natural Beauty – Exquisite natural beauty and clean environment.
- Diversity of activities.



## O'ahu

*The Island of O'ahu, The Heart of Hawai'i*, is positioned as a competitive island destination with more to see, do, and experience for today's active and sophisticated traveler. O'ahu's ability to provide the best of two worlds - an urban experience and a natural experience- is emphasized in its positioning:

- Depth and range of product, services, and experiences that allows greater choices and satisfaction.
- Accessibility of product that allows greater flexibility.
- Ability to have both an urban experience and a natural experience that is uniquely Hawaiian.

## Maui

*The Magic Isles of Maui, Moloka'i, and Lāna'i* are generally positioned as a favored destination offering a diverse experience within the multi-island county. The ease of "island hopping" to Maui's sister islands - Moloka'i and Lāna'i - encourages multiple island visits. Emphasis is on several pillars of strength: aloha spirit, Hawaiian culture, soft adventure, diverse activities, and an array of natural sites.

- Maui - Romance, especially destination weddings and honeymoons; scenic natural beauty; appeal of championship golf.
- Moloka'i - Indigenous Hawaiian culture; historic sites; outdoor sports, such as hiking, mountain biking, and kayaking.
- Lāna'i - Relaxation and serenity; championship golf; idyllic romantic settings.

## Hawai'i's Big Island

*Hawai'i's Big Island - Hawai'i's Island of Adventure* is positioned as an island so diverse in its geographical and cultural assets, as well as its unique outdoor experiences, as to be an authentically big experience -- big adventure - Big Island. Positioning for the island reinforces the following strengths:

- Authenticity of the Big Island experience.
- Diversity of geography and cultures.
- Abundant array of active adventure experiences that encompass all ages and interests.

## *MARKET SEGMENTS*

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HVCB has identified five main market segments on which to focus its marketing efforts, based on market research and direction from the HTA. They represent Hawai'i's best opportunities to achieve HTA's business objectives by matching consumer lifestyle preferences, travel behaviors and spending, and propensity to travel to Hawai'i with Hawai'i's unique product offerings.

- Avid Traveler
- Outdoor Recreation
- Culture & Arts
- Romance
- Golf

While consumers within each of the targeted segments possess strong shared lifestyle interests specific to their groups, there is also overlap between the segments which results in marketing efficiencies allowing HVCB to target multiple segments via a single lifestyle-oriented communication channel. In addition, the targeted segments provide the lifestyle-interest aperture through which lifestyle market segments (i.e., families, seniors, etc.) are effectively communicated with.

## ***AVID TRAVELER***

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### **The Avid Traveler**

is a higher-spending, discriminating, outgoing, and well-traveled consumer who takes vacations seriously, seeking unique travel experiences and high levels of service as an integral part of their lifestyles

### **Market Segment Definition**

Avid travelers are highly experiential and discriminating consumers who demand a high level of service delivery for all of the products/services they purchase. On vacation they require the same high service levels, both from their accommodations and from the activities they engage in.

### **Market Situation**

HVCB has estimated that the total U.S. market size for the avid traveler market segment covers 19 million households. Historically, the market tends to stay at higher-end accommodations, and participate in a wide variety of paid activities during their vacation. These travelers typically are married, no children in the household, median age of 48, and above-average household income (generally \$100,000+). These seasoned travelers index high in enjoying fine wines, fine foods, foreign travel, fine arts, and cultural and art events.

As a destination, Hawai'i has many attributes for attracting the avid traveler. The unique culture of Hawai'i, along with its natural beauty, diversity of activities, and Aloha Spirit, as expressed by its people, are especially effective in differentiating Hawai'i from its competitors and attracting this market segment. Further, Hawai'i offers high-end accommodations statewide to satisfy the Avid Traveler.

## Competitive Set

<u><i>Domestic</i></u>	<u><i>International</i></u>
California	Europe
❖ Wine Country Regions (Napa, Sonoma, Santa Barbara)	❖ United Kingdom
❖ San Francisco	❖ Italy
❖ Los Angeles	❖ France
New York City	Southeast Asia
U.S. Southwest	South Pacific
❖ Phoenix/Scottsdale	❖ Australia/New Zealand
❖ Taos	❖ Tahiti
❖ Sedona	Caribbean
Las Vegas	Premium Cruise Lines

## Product Definition

Hawai'i offers the discerning traveler the cachet of unique, high-level accommodations, services, and fine living choices including cuisine, golf, spas, upscale and uniquely Hawaiian retail opportunities, and cultural experiences. This is coupled with the authenticity of the experience, exotic natural beauty, diversity of activities, all delivered with the warm Aloha Spirit found in its people.

## Objectives

- Solidify Hawai'i's already highly positive brand perceptions among avid travelers, as measured by the TNS study.
- Positively impact travel considerations/intentions for Hawai'i among avid travelers, as measured by the TNS study.

## Strategies

### *Consumer*

- Focus the core message on the uniqueness of Hawai'i in a way that will resonate with this group of travelers. Avid travelers will return home anxious to share their only-in-Hawai'i experiences and insights with their friends, family, and colleagues.
- Differentiate Hawai'i from competitive destinations by raising the awareness of our uniquely Hawaiian experiences and attributes.

### *Travel Trade*

- Develop new marketing initiatives in the avid traveler segment to include select upscale agency groups in partnership with wholesalers.
- Promote editorial coverage in the trade media to highlight benefits Hawai'i has to offer the avid traveler.
- Integrate the avid traveler segment into our travel trade education and training presentations emphasizing the value of selling to the avid traveler from an agency revenue standpoint.

### **Target Audience**

- Age: 45 – 64
- No children at home
- Median age: 48
- HHI: \$100,000 +
- Enjoy wine, cuisine, golf, theater, cultural events, luxury cars, spa and travel
- Travel habits: High frequency of international travel

## **OUTDOOR RECREATION**

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**The Outdoor Recreation Traveler** is a higher-spending, active consumer who relaxes by engaging in outdoor activities ranging from the less arduous to those that test their physical abilities. On vacation, they seek destinations which offer a diversity of outdoor experiences

### **Market Segment Definition**

Outdoor recreation travelers are people who relax by being active. Their activities cover a wide range from the strenuous to the less arduous, but active nonetheless. Given that being active is an integral part of their lifestyle, they naturally seek out destinations that offer a variety of interesting and unique outdoor activities.

### **Market Situation**

Outdoor travel is one of the fastest growing travel segments in the nation. More vacationers are seeking an escape into nature during their vacations. The Travel Industry Association of America (TIA) estimates that 15.9 million U.S. air travelers participate in outdoor recreational activities during their trip, with over 3.5 million air travelers citing outdoor recreation as their primary purpose of trip. This active, high-experiential segment is heavily skewed toward Gen X and Baby Boomer consumers with a median age in the mid-30s, who live in the U.S. West, and tend to participate in more destination activities than the average traveler. Outdoor recreation travelers' top trip activities include: beach activities; shopping; water sports; visiting national/state parks; sightseeing; and visiting historical places, sites, and museums.

Nearly 91 percent of U.S. visitors to Hawai'i said that they participated in recreational activities during their trip, according to DBEDT's 2003 Visitor Satisfaction and Activities Report. U.S. West and Canadian visitors had a higher propensity to participate in recreational activities than their U.S. East counterparts.

Outdoor experiences are clearly one of Hawai'i's diverse strengths, with respondents to TNS' 2004 study giving the state high ratings as an Active Recreation destination, outranking Florida, California, Europe, the Caribbean, Alaska, Australia and Mexico.

### **Competitive Set**

<b><u>Domestic</u></b>	<b><u>International</u></b>
California	Canada
Florida	Mexico
Rockies Region	Costa Rica
	Caribbean
	Australia/New Zealand

### **Product Definition**

With ideal, year-round tropical weather and unsurpassed natural beauty, Hawai'i is an outdoor playground with a plethora of recreational and sporting activities in an environment that invigorates the mind, body, and spirit.

### **Objectives**

- Solidify Hawai'i's highly positive brand perceptions as a destination with active recreational choices within the TNS study. On a five-point scale, Hawai'i received mean ratings of 3.74 and 3.70 among USW and USE respondents (respectively) in 2004, as a destination with active recreational choices.
- Positively impact travel interest/intentions for Hawai'i among adventure travelers, as defined and measured within the TNS study.

## Strategies

### *Consumer*

- Showcase the breadth of Hawai'i's outdoor activities, from the mountains to the ocean, including some of Hawai'i's lesser-known recreational activities.<sup>2</sup>

### *Travel Trade*

- Develop programs with the travel trade to promote the breadth of activities that visitors can participate in while on vacations to Hawai'i. Programs will be heavily promoted with wholesaler and travel agency partners during the fall shoulder season campaign.
- Maintain outdoor recreation editorial content on HVCB's travel trade website for use by travel trade partners in their own marketing vehicles.
- Integrate the outdoor recreation segment into travel trade education and training presentations, highlighting unique examples of activities available in Hawai'i.

## Target Audience

- Age: 25 - 45
- HHI: \$75,000 +
- Participates in a wide variety of outdoor activities, but not "specialist" in any particular one
- Experience-focused
- Proactive about health
- Travel habits: High frequency of domestic and international travel

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<sup>2</sup>Lesser known recreational activities such as hiking a volcano on Hawai'i's Big Island, flying high on Kaua'i and Maui zip lines, or cruising down on a tube ride on Flumin the Ditch, etc. would be included along with more well-known activities such as biking, hiking, whale watching, horseback riding, golfing, and all forms of water sports (e.g., kayaking, jet skiing, skin diving, snorkeling, surfing, deep-sea fishing, windsurfing, etc.).



## ***CULTURE & ARTS***

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**The Culture and Arts Traveler** is a higher-spending, highly-educated, well-traveled consumer who seeks to actively learn about and experience the unique culture, arts, and history of a destination

### **Market Segment Definition**

Culture and arts travelers are highly educated consumers for whom involvement with culture and the arts is a necessary and enriching part of their lives. Therefore, when they travel, these consumers are attracted to places where they can engage with the unique culture, lifestyle, and arts of the destination. This immersion into a destination's culture and arts scene broadens the visitor experience and becomes valuable social currency once they return home.

### **Market Situation**

This higher spending travel segment consists of discriminating consumers who possess a strong propensity for participating in a wide variety of activities that enhance their knowledge of a destination's culture. An estimated 23.0 million U.S. air travelers visit historic places, sites and/or museums during their travels, according to the Travel Industry Association's TravelScope survey, while 7.1 million domestic air travelers attend cultural events/festivals during their vacation.

Hawai'i's distinct, unique culture well positions the state for attracting the culture and arts traveler. According to DBEDT's latest Visitor Satisfaction and Activity Report (2003), 81 percent of U.S. visitors to Hawai'i participated in at least one culture/arts activity, event, or attraction during their trip. The most popular cultural activity among the U.S. West (60.0%) and U.S. East (65.5%) respondents was to visit historical sites in Hawai'i. U.S. first-time travelers (91.0%) had a higher propensity to participate in arts/culture activities, events and/or attractions than their repeat-visitor counterparts (77.4%).

## Competitive Set

<u><i>Domestic</i></u>	<u><i>International</i></u>
California	Europe
U.S. Southwest	❖ United Kingdom
❖ Arizona	❖ Italy
❖ New Mexico	❖ France
Major Metro Centers	Asia
❖ New York	❖ China
❖ Los Angeles	❖ Japan
❖ San Francisco	❖ Vietnam
❖ Chicago	❖ Thailand
	Australia/New Zealand

## Product Definition

Hawai'i offers a distinct sense of place, which is based on the host native Hawaiian culture with its own language, music, and dance. This is further enhanced by the evolving and diverse ethnic composition of Hawai'i that delivers a uniquely vibrant mix of multi-cultural cuisine, fine arts, performing arts, and fashion.

## Objectives

- Solidify Hawai'i's high level of brand perceptions as a destination with an "intriguing culture and history" as measured by the TNS study. On a five-point scale, Hawai'i received mean ratings of 3.85 and 3.65 among U.S. West and U.S. East respondents (respectively) in 2004, as a destination with an intriguing culture and history.
- Positively impact travel interest/intentions for Hawai'i among cultural travelers, as defined and measured by the TNS study.

## Strategies

### *Consumer*

- Leverage HTA's investments in programs that support culture and arts initiatives in Hawai'i, including the Hawai'i Arts Season and the Aloha Festivals.
- Communicate Hawai'i's unique array of multi-cultural art, cuisine, dance, music, history & fashion.

### *Travel Trade*

- Develop marketing programs with the travel trade to promote Hawai'i's unique culture and arts assets, with a focus on the Hawai'i Arts Season during the spring shoulder season campaign
- Leverage the many culture and arts festivals and events through the interactive events calendar on the travel trade website, agent e-newsletters, and through enhancements to pre-arrival welcome packet distributions on behalf of travel agents
- Integrate Hawai'i's unique cultural attributes throughout all travel trade education and training presentations, and coordinate statewide efforts at major travel trade events such as ASTA World Travel Congress

### **Target Audience**

- Age 35 – 64, skew older, 50 - 64
- Married
- No children living at home
- HHI \$100,000 +
- Member of arts groups
- Attracted to culture and arts activities
- Educated/sophisticated/curious enough to understand and appreciate or value what the host culture has to offer

## ROMANCE

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**The Romance Traveler**  
is a high-spending consumer, who seeks  
once-in-a-lifetime, unique travel experiences  
and engages in a variety of activities  
during their special trip

### Market Segment Definition

The romance segment has two components: **honeymoons** and **destination weddings**. Honeymoon and wedding travelers look for once-in-a-lifetime experiences to mark this important milestone. These travelers are discriminating consumers who are looking for “special moments,” and tend to develop a life-long affinity for the destination where their extraordinary event takes place.

### Market Situation

There are approximately 2.1 million marriages annually in the United States – a number that has remained relatively constant since 1980. However, Fairchild Bridal Group predicts a pick-up in weddings business is coming, as the first of 71 million Echo Boomers (i.e., children of Baby Boomers) hit marriage age (27) in 2006.

### *Honeymoons*

Americans take an estimated 1.8 million honeymoon trips each year, which represents over 13.5 million room nights, according to the Knot. American honeymooners are a \$7 billion market, estimates the Fairchild Bridal Group, as honeymooners spend 290 percent more than the average leisure traveler on their once-in-a-lifetime trip. In addition, honeymooners also plan/book their trip further out than the average leisure traveler – with honeymoon planning normally starting seven months prior to the wedding, and travel bookings occurring five months in advance of the big day.

In Hawai'i, DBEDT reports that the domestic honeymoon travel market totaled nearly 273,000 visitors in 2004, outpacing the growth in overall domestic travel to the state. Honeymoon travelers to Hawai'i are overwhelmingly first-time visitors to the Islands, with a U.S. East skew, and tend to engage in both more and a wider range of activities during their trip, spending more than the average leisure traveler to the state. Over half of all honeymoons from each of the North American markets (U.S. West, U.S. East, and Canada) occur during the shoulder seasons of spring and fall.

### ***Destination Weddings***

The U.S. market for destination weddings is estimated at 162,000, representing 10.8 million room nights, which include wedding guests, according to the Knot. The Fairchild Bridal Group reports that nine percent of couples have a destination wedding, an increase of 200 percent over the past 10 years. In addition, with Fairchild's estimate of the average destination wedding costing \$23,300, these travelers have a high propensity to spend more during their once-in-a-lifetime trip than the average leisure and honeymoon traveler.

In Hawai'i, DBEDT estimates that the domestic wedding travel market totaled over 62,000 visitors coming to Hawai'i for 31,000 weddings (representing nearly 20 percent of destination weddings) in 2004, outpacing overall domestic travel growth to the state. Like their honeymoon counterparts, wedding travelers are heavily first-timers, and participate in a greater number and variety of activities than average, with over half of all weddings from each of the North American markets (USW, USE, Can) occurring during the shoulder seasons of spring and fall. Unlike honeymooners, Hawai'i's destination wedding travelers skew toward the U.S. West.

### **Competitive Set**

<b><u>Domestic</u></b>	<b><u>International</u></b>
California	Caribbean
Florida	Luxury Cruise Lines
New York City	Mexico
Las Vegas	Mediterranean
	South Pacific

## **Product Definition**

Hawai'i's tropical island charm and inherent romantic appeal make the Hawaiian Islands *the* exotic and out-of-the-ordinary destination for weddings and honeymoons that leaves people with unforgettable memories and a desire to return.

## **Objectives**

- Solidify Hawai'i's high level of brand perceptions as a romantic destination, as measured by the TNS study. On a five-point scale, Hawai'i received mean ratings of 4.00 and 3.96 among U.S. West and U.S. East respondents (respectively) in 2004, as a romantic destination.
- Positively impact travel interest/intentions for Hawai'i among romance travelers, as defined and measured by the TNS study.

## **Strategies**

### ***Consumer***

- Communicate the memorable, only-in-Hawai'i weddings and honeymoon experiences available across the state.
- Make it easier for potential wedding and honeymoon visitors to engage with and understand the uniqueness of Hawai'i

### ***Travel Trade***

- Reinforce the benefits of selling honeymoons and destination weddings to Hawai'i in training and education seminars.
- Provide highly requested romance editorial content on travel trade website for use by travel partners in their own romance marketing material.
- Identify educational opportunities in partnership with wholesaler and travel agency distribution channels, that support awareness of Hawai'i as the favored romantic destination.

## **Target Audience**

### ***Honeymoons***

- Average Age: 28.3
- HHI: \$100,000 +
- First time visitor to Hawai'i (64%)
- East coast skew – Hawai'i visitors
- Regional breakdown<sup>2</sup> of national honeymoon source market
  - 43% North/Middle Atlantic
  - 21% Mountain/Pacific
  - 21% East Central
  - 15% West/South Central
- Female decision maker/influencer
- Buy-up

### ***Destination Weddings***

- Average Age: 29.4
- HHI: \$100,000 +
- West coast skew - Hawai'i visitors
- Regional breakdown<sup>3</sup> of national destination wedding source market
  - 36% North and Middle Atlantic
  - 28% Mountain/Pacific
  - 21% East Central
  - 14% West/South Central
- Female decision maker
- Buy-up

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<sup>3</sup> Source: *The Knot* research

## **GOLF**

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**The Golf Traveler**  
is a higher-spending, well-traveled consumer whose ideal vacation includes a new golf adventure complemented by a diversity of destination activities to engage in off the course

### **Market Segment Definition**

Golf travelers are passionate about the game and it fills a regular spot in their full lives, no matter how busy they may be. The game permeates their lives to the point that when it comes to planning vacations, they generally have a personal list of top golf holes, and therefore destinations, already in mind. This group also regularly enjoys activities that complement golf vacations, including cuisine, spa, and shopping options.

### **Market Situation**

Out of the nation's estimated 27 million golfers, over 44 percent are considered golf travelers. These 12 million golf travelers play 72 million rounds of golf per year, and average 6.6 golf trips per year. They also have a higher-than-average annual household income (74 percent of the market make \$100,000 or more) and tend to spend more than the average traveler.

The Hawai'i golf visitor is an active, higher-spending traveler who participates in many more activities than just golf. These affluent travelers spend an additional \$824 per trip in Hawai'i just on golf-related expenses (rounds, merchandise, and food and beverage during golf). Hawai'i golfers also hold certain expectations when taking their golf vacation in the Islands, including fewer crowds (indicating a more exclusive, prestigious experience); superior courses; a unique and thrilling golf experience including physical course expectations; and exploration beyond the course, including sightseeing, relaxing and pampering. Hawai'i is considered a "*high-stakes vacation*," in that if one is going to invest the time and money in a Hawai'i vacation, one expects quality courses and a quality experience.



## Competitive Set

<u><i>Domestic</i></u>	<u><i>International</i></u>
<b>Primary</b> - Resort-driven; appealing to couples; "golf-plus" with spa, cuisine, wine tasting <ul style="list-style-type: none"><li>❖ Pebble Beach &amp; Monterey Peninsula</li><li>❖ Scottsdale, AZ</li></ul>	Mexico Caribbean United Kingdom (primarily Scotland) Ireland
<b>Secondary</b> - Resort-driven, but with more families; with various price points; younger set <ul style="list-style-type: none"><li>❖ Las Vegas, NV</li><li>❖ Orlando, FL</li><li>❖ Central Oregon (Bend and Sun River)</li></ul>	
<b>Tertiary</b> - Less about resort and more about golf; guys getaway for golf weekend <ul style="list-style-type: none"><li>❖ Hilton Head, NC</li><li>❖ Myrtle Beach, SC</li><li>❖ Robert Trent Jones, AL</li></ul>	

## Product Definition

Hawai'i is a year-round golf vacation destination. It offers more than 80 courses on six different islands, excellent accommodations and resorts, along with adventuresome pre- and post-golf activities and attractions for the entire family, making it appropriate for all golfers.

## Objectives

- Further strengthen the perception of Hawai'i as a destination that is a "Great place to golf" in the TNS study. On a five-point scale, Hawai'i received mean ratings of 3.40 and 3.04 among U.S. West and U.S. East respondents (respectively) in 2004, as a destination that is a great place to golf.
- Positively impact travel interest/intentions for Hawai'i among golf travelers, as defined and measured by the TNS study.

## **Strategies**

### ***Consumer***

- Secure media apertures that allow Hawai'i to break through the clutter and promote *Hawai'i, Golf Adventures in Paradise*.
- Promote year-round play in Hawai'i.

### ***Travel Trade***

- Leverage the travel trade to market golf travel to Hawai'i.

## **Target Audience**

- Age 35-64, heavily male skew
- HHI: \$100,000+
- Avid golfer (plays 50+ rounds/year); CEO/top management; country club member
- Seasonality skew: Autumn trip planning
- Golf is an important activity for them when they travel to Hawai'i, but it is not the only activity they participate in when they are here
- They are "sensitive" to the needs of the others in the travel party
- Typically travel as couple, without children
- Frequent travelers (domestic and international)
- Travel for golf several times a year
- Appreciate fine dining

## FOUNDATIONAL MARKETING PROGRAMS

A matrix of foundational marketing programs underlies the major initiatives described in the previous section. These programs provide a steady and consistent voice for Hawai'i in the consumer, travel trade, and meetings marketplaces. This section of the ATMP describes these programs in greater detail:

- Web Sites
- E-mail Marketing
- Public Relations
- Collateral
- Customer Relationship Management
- Market Trends (Research)
- Travel Trade

### Websites

Given the importance of the Web in travel planning, the HVCB web sites play a key role in the marketing mix. As the official web sites for tourism in Hawai'i, they contain a wealth of objective information for travelers.



Gohawaii.com, Kauaidiscovery.com, Visit-oahu.com, Visitmaui.com, Bigisland.org

- Objective: To move web surfers down the purchase continuum from awareness to desire to intent as measured by the online survey.
- Rationale:
  - *Branding mechanism.* The HVCB sites provide a rich emotional experience to engage the viewer and move the viewer down the purchase continuum from awareness to desire to intent. For example: Showcasing the real people of Hawai'i in multimedia stories on

gohawaii.com; photo tours of O'ahu's neighborhoods on visit-oahu.com; and experiencing the volcanoes of Hawai'i's Big Island with interactive tools on bigisland.org. You can also view virtual tours of Kaua'i and Maui on kauaidiscovery.com and visitmaui.com respectively.

- *Information source.* Each site has a calendar of events and market segment sections (golf, romance, etc.) that provide useful planning information. Viewers are able to see the breadth of activities that are available, thus encouraging longer stays and increased per person per day spending.
- *Lead generator.* Throughout the site, member links related to each topic are listed. A searchable database is also provided, allowing viewers to connect with members directly and in many cases, book their travel, accommodations, activities, etc.

## **E-mail Marketing**

E-mail continues to be an effective tool to maintain top of mind awareness for Hawai'i. It also provides information about accommodations, activities, and unique events that entices people to book a trip, as well as stay longer and spend more.

In 2006, HVCB Central and the Island Chapters will build upon these successes by coordinating e-blast schedules and utilizing a central subscription page. Consumers who opt-in will be able to access the centralized subscription page to manage their preferences by island and market segment.



## **Public Relations**

The public relations program is responsible for broadening the state's brand by highlighting the diversity and uniqueness of the destination, and to provide a fresh face by promoting what's new in the Islands. Part of this effort requires emphasis on niche tourism activities that provide first time visitors with more reasons to travel to Hawai'i and past visitors with more reasons to return. An additional program goal is to highlight the core cultural assets of Hawai'i – such as Hawaiian music – that help differentiate the destination. The public relations program also places an emphasis on the promotion of the spring and fall shoulder seasons.

### *News Bureau Activities*

HVCB's News Bureau manages national and local media liaison and coordinates inbound media visits to the Islands. HVCB will utilize its News Bureau to reach national media with targeted information for the major market segments on a year-round basis.

Primary responsibilities include:

- Respond to media requests for information and disseminate destination information
- Maintain and distribute HVCB press kit
- Foster a productive relationship with TV production companies encouraging them to showcase elements of Hawai'i's appeal.
- Qualify and bring media on assignment to visit multiple islands, develop trip itineraries, and provide story ideas and destination information
- Liaise with Island Chapter PR staff on media opportunities and travel itineraries
- Manage public relations website

### *National Television Initiatives*

- HVCB continues to proactively seek positive destination exposure through national network and cable TV programming at a low cost of entry. The destination benefits from being within the content and focus of many shows, reaching significantly large national audiences that would otherwise be beyond the paid advertising budget. Cable networks will be pursued based on the market segment.
- Opportunities to work with network television stations such as ABC, CBS, NBC, and FOX will be sought throughout the year via its national morning news programs and special shows.

### *Apana Niche E-Newsletters*

HVCB will issue quarterly niche e-mail newsletters to targeted media in the following categories:

- Golf/Sports
- Family
- Eco-Tourism/Soft Adventure
- Health and Wellness
- Culture and Arts
- Cuisine

## *Travel Journalist Association Meetings*

In order to keep the highest proactive profile for the destination in the travel media community, HVCB will attend significant annual and regional meetings, conferences and conventions of travel writers that cover the North America market. This will include attendance at gatherings of the Society of American Travel Writers (SATW), Travel Media Showcase (TMS), and Travel Media Association of Canada (TMAC). Pre/ post media visits will be coordinated in the cities these conferences are held and in nearby secondary/tertiary markets.

## *Media Blitz Program*

HVCB Central and the Island Chapters have coordinated their media blitz schedule for 2006, providing separation in timing and focus while scheduling visits with key media. The Island Chapters will continue to promote their unique assets whereas the Central focus will be on statewide initiatives and will branch out from print to put more emphasis on developing broadcast and online media coverage.

## Collateral

- Consumers and travel agents continue to turn more and more to the Internet for travel information. This has resulted in declining demand for printed collateral. However, the demand is still significant and it remains important for Hawai'i to provide appealing and informative printed material that motivates consumers to select Hawai'i for their vacation and then helps them expand the number of sights and activities that they want to engage in once here.



- In 2006, HVCB will complete an updated study on the role of existing printed collateral in relationship to evolving customer needs and the overall mix of marketing and sales vehicles. Appropriate changes will be implemented in 2007. Existing collateral include: Visitors guides (Hawai'i and each Chapter),



an all-islands map, individual island maps for six islands, a student information brochure, a travel professional's sales guide, and island-specific niche brochures.

- *Golf Guide*: HVCB is developing a statewide, printed golf collateral piece as part of the growing golf marketing initiatives. The guide will include all golf courses in the state, as well as other lifestyle elements, such as cuisine and spa options, that are appealing to the golf target audience.

## **Customer Relationship Management**

HVCB's Customer Relationship Management System will continue to provide an integrated system for communicating with consumers both while they are considering a trip to Hawai'i and after their trip, should they communicate concerns or complaints. In addition, CRM assists the Travel Trade Department in maintaining its communications with the travel trade, and provides technical assistance to the Island Chapters.

### ***Call Center***

- Although HVCB's family of websites fulfill an ever-increasing proportion of customers' information needs, there are still those who prefer to speak to a live person to get their questions answered and to order printed material. Therefore, the call center will continue to provide 24-7-365 live operator service to answer calls to its main 1-800-gohawaii and individual island 800 numbers, as well as respond to email inquiries from the website and, in the case of gohawaii.com, handle click-to-talk live inquiries.
- The call center provides a single, live point of contact for consumers and travel agents to get information and collateral material about Hawai'i and its islands and to convey it in a way that enables them to experience the Aloha Spirit of Hawai'i's people.



### ***Database***

- HVCB maintains one consumer database of everyone who has requested collateral material, responded to a marketing promotion, or opted into an electronic newsletter program. The database supports e-newsletter and other e-marketing programs, including the management of opt-ins and opt-outs in compliance with current laws. Analysis of the database also provides useful

information about what potential visitors are interested in doing, which islands they want to visit, when they are planning to visit, etc.

- The consumer database contains records, history, activity, survey responses, etc., regardless of the entry point into the system, i.e., through *gohawaii.com* website or 800# as well as through individual island portals and 800#s.
- In 2006, plans call for an ongoing, automated conversion survey to determine the profiles of the inquirers most likely to actually visit Hawai'i following their inquiry. Also planned is a periodic survey to measure satisfaction with the collateral material received that will be used to identify needed improvements, additions, and deletions.

### ***Fulfillment***

- HVCB mails or emails requested information and collateral to support the conversion of interest into actual travel, and to encourage increased activity and spending during the Hawai'i visit. Additionally, collateral material is shipped to the travel trade upon request and to trade shows covered by HVCB and Chapter staff.
- As demand for paper collateral continues to decline, HVCB will continue to seek out more cost-effective, electronic fulfillment mechanisms.

### ***Digital Asset Management System (Knowledge Bank)***

- HVCB maintains an online database that provides consistency in the delivery of the Hawai'i brand through still images, film and video footage, advertising templates, and copy that are used in advertising and promotion, the website, electronic newsletters, reports, and presentations. The public has access to the assets that have been acquired free and clear, while other access is password protected. HVCB staff has access to all areas. Travel trade partners and the media have a special level of access and HTA and its other marketing contractors have access to images that have been cleared for international use by all HTA-related entities.

### ***Complaints***

- HVCB continues to receive and respond to walk-in, mail, e-mail, and faxed complaints from visitors about some aspect of their trip to Hawai'i including those referred by HTA, the Governor's Office, and by visitors from all countries except for Japan. Typically, there is nothing that HVCB per se can do except to inform the company or entity against whom the complaint is made, put the complainant in touch with Consumer Protection, and VASH.



## *Visitor Information Offices*

- HVCB's knowledgeable staff continues to give walk-in visitors from around the world an experience of Aloha by answering their questions about Hawai'i, providing maps and other brochures, directions, and other collateral materials.

## *Market Trends*

- The Market Trends department provides internal and external customers actionable information to support the marketing of Hawai'i as a premier leisure, meetings and incentives destination.
- Internal marketing customers receive analyses of new and existing data from multiple sources, which serves as the foundation for informed marketing decisions regarding targeting, messaging, and media channels.
- Market Trends assists external customers by providing insight into trends affecting Hawai'i's visitor industry via direct communications, its Market Trends Online website, and its biweekly Tourism Industry Update which highlights trends, new research, events, etc. of interest to stakeholders. Local and mainland companies, news and travel trade media, and government offices are frequent external customers of HVCB Market Trends services.
- In addition to the collateral-effectiveness and database conversion research referenced above, Market Trends in 2006 will continue its ongoing advertising/message testing research and expand efforts at measuring the effectiveness of HVCB's online marketing initiatives and other marketing programs.

## Travel Trade

### *Market Segment Definition*

Travel Trade is comprised of four business segments: wholesalers, travel agents, airlines, and travel media. Currently, there are 30 to 40 wholesalers and approximately 30,000 travel agencies in the U.S and Canada, according to ARC (Airline Reporting Corporation), CLIA, and ASTA. There are conservatively 150,000 travel agents in the U. S. and Canada according to the Bureau of Labor Statistics, NACTA and various industry sources.<sup>4</sup>

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<sup>4</sup> It is difficult to quantify the exact number of travel agents since there are no industry standards in effect to accurately account for the emerging home-based agent population.

## *Market Situation*

According to the state Department of Business, Economic Development, and Tourism (DBEDT), more than one-third (37%) of Hawai'i visitors rely on travel agents as sources of information, and even greater numbers of visitors enlisted the help of travel agents for booking their air travel (76%), hotel arrangements (62%) and rental car (53%). The travel trade industry has experienced a major consolidation since 9/11 and will continue to experience more consolidation in the future, but at a slower pace.

The general application of e-marketing tools has accelerated and is becoming pervasive in the travel trade industry, primarily because e-marketing is proving to be cost effective, time sensitive, and provides agents with the ability to foster dynamic one-to-one relationships with their customers.

While the sheer number of travel agent transactions is declining, yields are trending up, as many consumers demand the expertise, knowledge, and personal service of a travel agent. Wholesalers that bundle value and ease of booking to both consumers and travel agents are showing good returns. This is because while consumers crave information and look to many resources to get it, they continue to book via a travel agent for complicated itineraries and unfamiliar destinations or products. Travel agent on-line bookings via the wholesaler websites are up dramatically as savvy agents are taking advantage of the flexibility of servicing their customers 24/7/365.

Additionally, websites designed for agents, that offer advice and resources, are proving to be valuable marketing tools. Product familiarity and ease of access to resources is essential in assisting the travel trade partners in selling a destination.

## *Objective*

- Leverage the strength of the Hawai'i brand with the travel trade channel, facilitate strategically aligned positioning messages, and assist travel trade partners in their conversion efforts.

## *Strategies*

- Coordinate firm-wide annual RFP's with the travel trade industry.
- Coordinate tactical co-op marketing programs around shoulder seasons with select market segments and travel trade partners in order to drive intent and lead-in to conversion.
- Provide exceptional education and training for the travel trade in order to bias the channel toward placing more weight against their Hawai'i product.

- Maintain and further develop airline relationships with partnership opportunities that support key market segments.
- Continue and improve travel trade media relationships.

### *Education and Training*

One of the primary responsibilities of the travel trade team is to educate wholesalers and travel agents about Hawai'i. Education has become one of the most important factors in determining HVCB participation in tradeshow and events. Training is customized to the audience, i.e., USE vs. USW and is designed to support the overall goals and strategies as outlined by the HTA and overcome the unique barriers to conversion common to each MMA. In order to operate as efficiently as possible, HVCB continues to develop on-line resources to educate and train agents and wholesalers.



- HVCB supports the following:
  - Product launches, often in cooperation with airline wholesalers in gateway cities
  - Major events such as ASTA, Luxury Travel Expo, Travel Agency National Conferences (such as AMX, Virtuoso, AAA). Participation is evaluated annually.
  - Wholesaler Call Center/Reservation Training
  - *Mahalo* events in partnership with wholesalers
  - Certified Destination Specialist programs:
    - Central manages the statewide program, *Ke Kula O Hawai'i*, that provides a base-level of knowledge for agents, which will be updated in 2006 based on primary research.
    - Each of the Island Chapters manages Certified Destination Specialist programs that feature more island-specific curriculum.

### *Cooperative Advertising*

HVCB Central and the Island Chapters coordinate RFP submission for annual marketing plans to all wholesalers. The 2006 RFP's will be issued in July 2005. Responses will be due late August and HVCB Central and Island Chapters will approve plans in early October based on those plans that best support the HVCB goals and objectives. Plans are evaluated based upon the value added elements, type of marketing components, target market capabilities and ability to deliver a higher yielding customer who wants to stay longer, do and spend more.

## *eMarketing*

HVCB continues to refine and further develop an e-marketing tool set for the travel trade. [www.agent.gohawaii.com](http://www.agent.gohawaii.com) provides travel trade specific content as well as links to the consumer site, [www.gohawaii.com](http://www.gohawaii.com).

The new and improved online agent resource center at [www.agent.gohawaii.com](http://www.agent.gohawaii.com) provides agents with easy access to the calendar of events and the ability to download images; sales tools, such as ad templates and itinerary maps; island and market segment editorial content sections; and Hawai'i Destination Specialist (HDS) information.

Further leverage will result from cooperative efforts with wholesalers and travel agents via e-marketing tools and websites that expand Hawai'i's reach to millions of consumers HVCB could not otherwise access. Based on proprietary customer information, wholesalers and travel agents are also able to target consumers who have exhibited a higher propensity for longer stays and higher spending levels in the islands of Hawai'i.



## *Travel Trade Media*

The Travel Trade media consists of a variety of publications that are a communication source to the front line travel agent, owner/manager, or home-based agent, and the industry suppliers. The publications vary -- some provide story and editorial content, while others are more advertorial-oriented. These publications can be a valuable way to reach thousands of travel industry professionals.

HVCB will continue efforts to increase editorial coverage based on strategic direction and initiatives, and will investigate opportunities to develop rate negotiation platforms for HVCB Central and the Island Chapters in order to leverage firm-wide assets.

## Foundational Marketing Tactics

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Online Marketing (considered sites)</b>												
Expedia												
Expedia												
Orbitz												
Travelocity												
<b>Public Relations</b>												
<b>News Bureau/Travel Writer Program</b>												
Individual multi-Island media visits												
Media website and press kit updates												
Respond to media requests												
Pitch Hawaii-based writers												
"What's New in Hawaii" press release												
<b>Niche Media Marketing</b>												
Apana electronic newsletter - quarterly												
and arts; cuisine												
<b>National Television Initiatives</b>												
Cable networks based on market segments												
Network TV stations opportunities												
<b>Fall Shoulder Season</b>												
Individual Media Visits												
Press Release												
Aloha Festivals highlighted as part of season												
<b>Travel Media Conferences</b>												
TMAC, Calgary (February 18-21)												
SATW Western Regional, Philadelphia (June 2-6)												
SATW Annual Conference, Chile (October 18-23)												
Travel Media Shwcase (TBD)												
Coordinate pre/post media visits in nearby secondary/tertiary markets												
<b>Sports Program</b>												
PR support as needed for HTA-funded programs												
Pitch Hawaii sports ideas - local and national												
<b>Sharing Aloha</b>												

## Foundational Marketing Tactics (Continued)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Media Blitz</b>												
Consider a press trip anchored to a significant HAS event												
New York Media Blitz - May TBD; destination and brand messaging												
New York Blitz (Jan. 23-27)												
Los Angeles/San Francisco Blitz (September 11-15)												
Dallas/ Atlanta/ Birmingham/ Minneapolis Blitz (Jan. 30-Feb. 3)												
San Francisco/ Orange County/ Los Angeles/ San Diego Blitz (May 1-5)												
New York/ Boston/ Chicago Blitz (Oct. 23-27)												
Portland/ Seattle/ Vancouver Blitz 9 (Jan. TBD)												
San Diego/ Orange County/ Los Angeles/ San Francisco Blitz (Mar. TBD)												
Boston/ Chicago/ Atlanta Blitz (May TBD)												
New York/ Toronto Blitz (Sept. TBD)												
<b>Individual Media/News Bureau</b>												
Individual Media Visits (10)												
Respond to media requests												
<b>Annual Hawaii Media Breakfast</b>												
<b>Other PR Elements</b>												
Bi-monthly KVB member newsletter												
News releases												
Crisis communications												
<b>Press Trip</b>												
"Get Lost on O'ahu" Press Trip (March 2-7)												
Arts With Aloha Press Trip (Fall TBD)												
<b>News Bureau</b>												
Press releases												
Quarterly What's New												
Media website and press kit updates												

### Foundational Marketing Tactics (Continued)

[illegible]

## **SPECIAL PROGRAMS**

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HVCB has been charged with three additional special programs – the NFL Pro Bowl, the Waikīkī Redevelopment Project, and the health and wellness aspects of Hawai‘i’s marketing message.

### **NFL Pro Bowl**

The National Football League’s (NFL) Pro Bowl is a signature event for the state of Hawai‘i, providing significant marketing and media value as well as direct commerce via game operations and hospitality programs related to the event. The Pro Bowl receives year-round publicity and promotion creating a positive brand association between Hawai‘i and America’s favorite sport. HTA’s and the NFL’s objectives for 2006 include:

- Increase game rating and corresponding value to Hawai‘i
- Drive corporate involvement around game
- Generate incremental media coverage
- Create positive emotional connection for state of Hawai‘i with sports enthusiasts, communicate the compelling, active nature of a Hawaiian vacation



HVCB will work with HTA to support the achievement of these objectives. Further details and strategies for the NFL program are provided in Appendix A.

### **Waikīkī Redevelopment Project**

Within a five-year period ending in 2008, a figure approaching one billion dollars will have been invested in the approximately 1.6 square mile area of O‘ahu known as Waikīkī. The HTA has chartered HVCB with the development of a coordinated marketing plan to “re-launch Waikīkī.” The initial phase includes a product inventory analysis, followed by a market analysis, and then the development of a marketing communications program, all in partnership with the industry.



## **Health and Wellness**

In 2005, the Hawai'i Tourism Authority began investigating Health and Wellness as a potential niche market for travel to Hawai'i. The inquiry included an estimation of the size of the U.S. population that engages in various types of health and wellness activities as part of their lifestyle, the extent to which health and wellness is a motivator for travel to Hawai'i, and the believability of Hawai'i as a unique and appealing health and wellness destination. HTA will complete its analysis and determine the most appropriate course of action in 2006 and beyond. Once that decision is made, HVCB will adjust the 2006 ATMP accordingly. HTA has provided HVCB with limited funding for the message exploration process in 2006.

## ***MEDIA STRATEGY***

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### **2006 Media Strategy Summary**

***Time Compression. Multi-tasking. Ad Clutter. Convergence. Ad Blocking. TiVo.***

These are some of the most talked-about challenges in advertising today. Add to this the increasing competition for the affluent consumer who faces an ever-increasing array of consumer goods and services, and the picture looks pretty dim.

But while these issues place new demands on marketers, the good news is that new and effective opportunities have also emerged to meet the changing communications landscape. Consider the following:

- Even with fewer available leisure hours, “studies have found that media consumption has risen across the board...”  
(Greg Rodgers / *MediaPost Behavioral Insider* / 1-28-05)
- Television viewing time has actually increased by 37-minutes from five years ago. (*CableWORLD* / 4-20-05)
- 60 percent of men and 65 percent of women report simultaneously watching TV while online.  
(Don E. Shultz / *iMedia Brand Summit* / 9-13-04)
- “Offline experiences are being supplemented by broadband-accessed Internet to provide deeper information of differing viewpoints on subjects first learned about in other media...”  
(Yahoo/Mediaedge:cia / “It’s a Broadband Life” Study / 4-19-05)

By fully integrating campaigns, advertisers now have the ability to reach consumers at key touch-points in the Consumer Purchase Cycle with messages and information appropriate to the moment.

“Consumers crave rich experiences, regardless of the channel that delivers them. The next frontier of integration is to take a message through the different media channels while adapting it to take advantage of what consumers most love about that particular channel. This will make for a richer, more compelling brand experience.”  
(Meredith Jamin, *Mediaedge:cia* / “It’s a Broadband Life” Study / 4-19-05)

## 2006 Media Objectives

This is the foundation of our advertising strategy for 2006: Integrate. To meet the media challenge of the “next frontier of integration,” more sophisticated research tools and multi-channel media are allowing marketers to more efficiently vertically target their best prospects in all media. No one medium or communication channel is 100 percent effective at reaching today’s consumer. We must go where the consumer goes for information, entertainment, and purchase. Specific media objectives for 2006 include:

- Continue to find media opportunities that support brand-building against the selected targets
- Expand marketing presence through partnership to deliver increased weight against targets
- Increase media frequency to media targets

## Media Strategy Highlights

- Increase vertical integration of all communication and advertising efforts: Break down “media silos”.
- A more refined definition of the Hawai’i visitor target with an increased media focus on dual-income, no-kids (DINKS) households given seasonality focus and market segment analysis.
- Media timing and vehicles are governed by the Consumer Purchase Continuum.

### *Media Communications for Consumer Purchase Cycle Stages*

**AWARENESS → DESIRE → INTENT → CONVERSION**

#### AWARENESS:

- Hawai’i is a mature market in terms of its product life cycle. As such, Referral, Editorial/Content features and other Public Relations efforts are effective tools for communication. Specific paid media placements are not recommended for this stage.

#### DESIRE:

- At this stage in the Consumer Purchase Cycle, strategic media placements can play a significant role in the marketing mix, primarily by highlighting Hawai'i's brand strengths (Natural Beauty, Diversity, Aloha Spirit) through Image Advertising. Targeted Lifestyle Advertising to niche areas (Avid Traveler, Outdoor Recreation, Culture and Arts, Romance, and Golf) is also appropriate at this stage.

#### INTENT:

- Advertising will be designed to speak to customers who are qualified prospects. At this stage in the Consumer Purchase Cycle, it will be important to provide the support and links to keep Hawai'i in the customer's consideration set. Influencers, especially Travel Agents will be integrated into the communications strategy. Island Chapters, Destinations and Marketing Partners have a major role at this stage.

#### CONVERSION:

- This stage in the Consumer Buying Cycle is almost purely tactical. As such, the HVCB's advertising role will be to facilitate sales, while keeping a brand presence, as industry partners who provide products and services focus on closing the sale.

### Media Vehicles by Target and Purchase Cycle Stage

#### AVID TRAVELER

##### ○ **National Cable – Desire, Intent:**

Cable usage by upscale 'fine-living' consumers continues to increase against other media. In conjunction with other Avid Travel targeted media, cable will provide reach and frequency to this target not afforded through other media. The 'sight and sound' impact of television still is not matched by any other medium.

- Travel Channel
  - Core cable buy to reach Avid Traveler.
  - Flights supporting shoulder periods.
  - Partnership opportunities offered during the Spring & Fall tactical periods provide an opportunity for travelers in the Intent phase.
- Discover Channel, Other Cable
  - Scatter buys on other appropriate cable channels during shoulder support periods will be investigated.

○ **National Magazine – Desire, Intent:**

Lifestyle magazines are highly efficient at reaching the Avid Travel niche audience: media fragmentation notwithstanding, magazines are key information sources for upscale consumers. In concert with the Island Chapters, other Hawai'i advertisers, and the editorial coverage we receive, Hawai'i is building a year-round presence in magazines that reach our core Avid Travel audience. MRI research has been used to identify the best prospects. Ad strategies include:

- Single-leaf partnership program to be continued in key source markets. A lead brand message opens the piece and a partner message closes.
- Year-round placements around (not in) Hawai'i editorial and Island Chapter advertising extend reach and frequency.

○ **Online – Awareness, Desire, Intent:**

Avid Travelers use the web to research and book travel, making this media vehicle key in the Desire and Intent phases. Findings from an *Insight Express* 2005 Brand Awareness Study along with results from the 2005 campaign will be instrumental in determining site placements and messaging strategies in 2006. Fine-tuning elements of the 2006 plan include:

- Serving ads to viewers of competitive destination content.
- Fewer, but more high-end properties to increase share-of-voice against competition.

Message Strategies

- Avid travelers are highly experiential and discriminating consumers who demand a high level of service delivery for all of the products/services they purchase. On vacation they require the same high service levels, both from their accommodations and from the activities they engage in.
- Differentiate Hawai'i from competitive destinations by raising the awareness of our uniquely Hawaiian experience and attributes.

## OUTDOOR RECREATION

### ○ **National Magazine/National Cable/Online – Desire, Intent:**

- A vertically integrated cross-channel media effort is recommended for this target utilizing: National Geographic Adventure / National Geographic Traveler / National Geographic Channel (cable) / National Geographic online. Concentrating resources against one media company increases buying leverage as well as frequency to the target.
- To maximize reach to the Outdoor market, additional online placements are planned on sites that index high for Hawai'i Outdoor criteria.
- Television exposure with programming initiatives and event sponsorship such as XTERRA, Ironman, etc.

### Message Strategy:

- Showcase the breadth of Hawai'i's outdoor activities, from the mountains to the ocean, including some of Hawai'i's lesser-known recreational activities (i.e. hiking a volcano on Hawai'i's Big Island, zip-lining on Maui, tube riding on Kaua'i, eco-hiking on O'ahu, etc.)

## CULTURE & ARTS

### ○ **National Magazine – Awareness, Desire, Intent:**

A slight exception is made for this audience segment regarding the Consumer Purchase Cycle: While the focus of our effort is on developing a relationship with the consumer who enjoys and Desires to find Cultural and Art activities, Hawai'i does need to build Awareness of a recognizable brand for Culture and Arts. The core communication tool will be a series of Culture and Arts vignettes leveraged by the Culture and Arts icon and influencer, The New Yorker Magazine.

- An expanded content piece similar to the 2005 New Yorker effort is recommended to provide enriched content about Hawai'i's culture and arts environment to consumers.
- A following series of shorter pieces will continue to build the brand and provide continuity to the audience.
- Partnership opportunities will allow travel partners to capture intenders.

- **National Cable – Desire, Intent:**
  - Cable spots will run prior to the ‘Hawai’i Arts Season’ adding frequency and impact through ‘sight and sound’ via a high indexing network such as Travel Channel.
- **Online:**
  - Content and targeting in coordination with the Avid Traveler program will include Culture and Arts elements.

Message Strategies:

- Communicate the breadth of culture and arts experiences in Hawai’i.
- Promote Hawai’i’s unique array of culture, dance, music, cuisine, multi-culture art and fashion.

GOLF

- **National Magazine – Desire, Intent:**

A great many marketers are trying to gain the attention of this select and discriminating audience.

  - Leisure publications targeting business executives are recommended to avoid the clutter and high-cost of golf publications.
  - Single-leaf inserts will marry Hawai’i’s golf lifestyle attributes (world-class golf and dining, spa, etc.) with resort messages to help close the sale.
  - Targeted reach and frequency as well as the development of editorial content will be achieved.
- **National Cable – Desire, Intent:**
  - Cable placements will be timed to support the Aloha Season. Cooperative opportunities will be made available.
  - An opportunity to utilize an ETV (Enhanced Television) promotion tied to PGA and LPGA tournaments that targets avid golfers and sends them directly online to learn more about Hawai’i golf is being investigated.
  - Television exposure with programming initiatives on The Golf Channel during the Aloha Swing and Golf Hawai’i programs.

- **Online – Awareness, Desire, Intent:**

- Key findings from 2005, including proprietary online survey results and program-specific measures, will be applied to the selection of golf message placements in 2006.
- We will utilize Content/Geo-Targeting/Behavioral Targeting analysis to refine Search placements and key words.
- The Hawai'i golf message will also be supported by campaigns on PGATOUR.com, thegolfchannel.com, and other HTA-driven initiatives.

Message Strategies:

- Promote year-round play and the unique Hawai'i golf experience.
- Secure media apertures that allow Hawai'i to break through the clutter.
- Promote *Hawai'i, Golf Adventures in Paradise* as an award-winning golf destination offering championship golf on all six islands, luxurious spas, Hawai'i Regional Cuisine and a myriad of additional activities.

ROMANCE

- **Online –Desire, Intent:**

- Targeted romance and wedding/honeymoon planning sites will be utilized.
- The Internet has become the primary planning tool for weddings. Aligning with a major property will keep Hawai'i a top-of-mind destination for weddings and honeymoons.
- Online cooperative marketing programs will be provided, such as email marketing and co-branded mini-sites.

- **National Magazine and Cable:**

- Hawai'i is at the top of the list, or close to it, in all surveys asking where people would like to go for honeymoon and romantic vacations. The top honeymoon and wedding destination magazines have Hawai'i in every issue. As such, advertising by the broader brand is not necessary: Island Chapters and destination product and services advertising is appropriate within the Consumer Purchase Continuum for Intent.



- While no specific cable buy is planned for this target segment, the romance message will be contained within messages targeted on cable to the Avid Traveler.

#### Message Strategies:

- Communicate the memorable, only-in-Hawai'i wedding and honeymoon experiences available across the State.
- Make it easier for potential wedding and honeymoon visitors to engage with and understand the uniqueness of Hawai'i.

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In summary, the challenge in 2006 for the media plan is to find our target and capture their attention with enough frequency to have an effect. From Greg Rogers writing for the *Behavioral Insider* on 'The Importance of Integration' January 28, 2005 (Italics added):

"Studies have found that *media consumption has risen across the board*. This seems a bit counter-intuitive, at first, given that the number of hours worked annually by Americans is rising, thus leaving less discretionary time.

In response, *consumer behavior is adapting itself to the proliferation of the media landscape*. Most people dislike forgoing things that they enjoy. We love watching a great episode of "Lost" on Wednesday night. We love listening to U2's new song on the radio. We love sending instant messages to our best friends. And even the most ardent intellectuals have a tough time not reading about Brad and Jen's big breakup in *Us Weekly*.

The trend is to do more with less. People have learned to multi-task, and this ability (or at least intent) will have a profound impact on how the media industry functions in the years to come.

*As the playing field shifts towards a cross-media focus, the best (and only) way to reach consumers will be through seamless integration."*

## 2006 Consumer Print Media Plan - HVCB Central and Island Chapters Composite

PUBLICATIONS	Segment	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Arthur Frommer's Budget Travel</b>	AVID												
<i>HI Edit/Special Theme</i>				HI	HI					HI	HI		
Nat. Circ: 520,128			KVB 1/2Pg sprd			KVB 1/2Pg sprd		KVB 1/2Pg sprd					
Nat. Circ: 525,000													
<b>Athlon Golf</b>	GOLF	BIVB FP4C											
Nat. Circ: 300,000													
<b>Bridal Connection</b>	OMANCE	MVB					MVB						
<b>Bridal Guide</b>	OMANCE			MVB		MVB		MVB		MVB		MVB	
Nat. Circ: 205,482		KVB 1/2 + 1/3 Pg		KVB 1/2 + 1/3 Pg		KVB 1/2 + 1/3 Pg		KVB 1/2 + 1/3 Pg		KVB 1/2 + 1/3 Pg		KVB 1/2 + 1/3 Pg	
<b>Brides</b>	OMANCE			MVB				MVB				MVB	
<b>Brides - Honeymoon &amp; Weddings Awa</b>	OMANCE											KVB FP4C	
Nat. Circ: 300,000													
<b>Bon Appetit</b>	C & A								OVB SLI	OVB SLI			
Nat. Circ: 1,344,000													
<b>Conde Nast Traveler</b>	D, C & A,												
<i>HI Edit/Special Theme</i>	UTDOOR	Gold List	All Americas/ Cruise Poll	Europe	Design/Spa Poll	Hot List	Golf Poll	Island Issue	Top Trol Consultants	All-Star	Asia/Bus. Poll/R. Estate	Readers' Choice Poll	Ski Poll/Gift Guide
Nat. Circ: 750,000		HVCB FP+1/3	HVCB SLI		HVCB SLI				HVCB SLI				
HI Top Mkt Circ: 440,625				MVA 1/6 Banner									
Nat. Circ: 750,000		MVB				MVB	MVB	MVB				MVB	
HI Circ: 285,000			BIVB 1/2Pg sprd	BIVB 4Pg Insert						BIVB 1/2Pg sprd			
						OVB				OVB			

## 2006 Consumer Print Media Plan - HVCB Central and Island Chapters Composite

PUBLICATIONS		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Coastal Living</b>	AVID												
<i>HI Edit/Special Theme</i>					<i>HI</i>								
Nat. Circ: 650,000				HVCB SLI						HVCB SLI	HVCB SLI		
Nat. Circ: 650,000		MVB			MVB	MVB		MVB					MVB
<b>Departures</b>	AVID			BIVB 4Pg Insert									
USW Circ: 147,000													
<b>Food &amp; Wine</b>	AVID									BIVB 4Pg Insert	BIVB 4Pg Insert		
USW Circ: 300,000													
<b>Forbes FYI</b>	GOLF												
<i>HI Edit/Special Theme</i>				<i>Spring Fashion</i>	<i>Spring Travel</i>	<i>Summer Fun</i>				<i>Fall Fashion</i>	<i>Fall Travel</i>	<i>Winter Holiday</i>	
HI Golf Mkts Circ: 391,360				HVCB SLI						HVCB SLI			
<b>Golf for Women</b>	GOLF				OVB Spread Adv.					OVB Spread Adv.			
<b>Golf Living</b>	GOLF												
<i>HI Edit/Special Theme</i>		<i>Winter</i>			<i>Spring</i>					<i>Hawaii Issue</i>			
Circ: 105,000		HVCB FP4CB			HVCB FP4CB								
<b>Hawaii Magazine</b>	AVID	KVB Banner Spd		KVB Banner Spd		KVB Banner Spd		KVB Banner Spd		KVB Banner Spd		KVB Banner Spd	
Nat. Circ: 83,080													
<b>Healthy Choice</b>	AVID							OVB					
2005 HC Program included: Sunset, Food & Wine, Health, AF Budget Travel													

**2006 Consumer Print Media Plan – HVCB Central and Island Chapters Composite**

PUBLICATIONS		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Islands</b>	AVID			HVCB SLI			HVCB SLI					HVCB SLI	
Nat. Circ: 200,000													
Nat. Circ: 200,000			KVB Banner Pg	KVB Banner Pg	KVB FP			KVB Banner Pg		KVB Banner Pg			
Nat. Circ: 200,000					MVB	MVB	MVB						MVB
Nat. Circ: 200,000					BIVB 1/2Pg sprd								
<b>Links</b>	GOLF												
<i>HI Edit/Special Theme</i>			<i>Premier Resorts Guide</i>	<i>The Best of HI</i>	<i>Masters</i>			<i>British Open &amp; PGA Championship</i>		<i>The Best of HI</i>			
Nat. Circ: 300,000			HVCB SLI		HVCB SLI			HVCB SLI					
<b>Los Angeles</b>	AVID		OVB (HAL) coop	OVB (HAL) coop	OVB (HAL) coop								
<b>Midwest Living</b>	UTDOOR	MVB	MVB	MVB	MVB	MVB	MVB	MVB	MVB	MVB	MVB	MVB	MVB
<b>Modern Bride</b>	DMANCE		MVB				MVB		MVB				MVB
<b>National Geo Traveler</b>	UTDOOR				HVCB SLI			HVCB SLI			HVCB SLI		
Nat. Circ: 715,000													
USW Circ: 250,000		KVB Banner Pg		KVB 2/3 Pg, Adv		KVB 2" Skybox ad		KVB Banner Pg		KVB Banner Pg		KVB 1/3 Pg, 4C	
Select Circ: 185,000			OVB	OVB									
<b>National Geo Adventure</b>	UTDOOR				HVCB SLI		HVCB SLI				HVCB SLI		
Nat. Circ: 525,000													
USW Circ: 230,000			BIVB 1/2Pg sprd										
<b>San Francisco Magazine</b>	AVID				LVB 1/2 Pg h					LVB 1/2 Pg h			
<b>Southern Living</b>	AVID	OVB 1/6 Pg	OVB 1/6 Pg		OVB 1/6 Pg				OVB 1/6 Pg			OVB 1/6 Pg	
Circ: 2,700,000													

## 2006 Consumer Print Media Plan - HVCB Central and Island Chapters Composite

PUBLICATIONS		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Spirit of Aloha</b>	MARKET	LVB	LVB	LVB	LVB	LVB	LVB	LVB	LVB	LVB	LVB	LVB	LVB
		MVA 1/2 Pg											
<b>Sunset</b>	AVID	HVCB (HAL) FP coop							HVCB (HAL) 1/3-pg coop				
Nat. Circ: 1,450,000		KVB Banner Pg	KVB Banner Pg				KVB Banner Pg			KVB Banner Pg			
Nat. Circ: 1,450,000		MVB	MVB	MVB	MVB					MVB	MVB		
Nat. Circ: 1,450,000			OVb (HAL) coop		OVb (HAL) coop								
S. CA Circ: 375,000 & N. CA Circ: 400,000			BIVB 1/2Pg sprd	BIVB (HAL)						BIVB 1/2Pg sprd			
<b>Texas Monthly</b>	AVID			OVb 1/4 Pg	OVb 1/3 Pg				OVb 1/4 Pg				
<b>The New Yorker</b>	A & C												
HI Edit/Special Theme		Jan-23: Double- issue	Feb-13: Double- issue	Mar-20: Double- issue	Apr-24: Journey issue				Aug-7: Double- issue	25-Sep			
Select Circ: 351,500		HVCB 4Pg Insert	HVCB SLI	HVCB SLI	HVCB SLI				HVCB SLI	HVCB SLI			
Top DMA Circ: 486,939				OVb SLI or FP4C								OVb SLI or FP4C	

## 2006 Consumer Print Media Plan - HVCB Central and Island Chapters Composite

PUBLICATIONS		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Travel & Leisure	AVID												
HI Edit/Special Theme		Top 500 Places	Romantic Dest.	HI	American	HI	Hotels/World's Best Service	HI	World's Best Awards	HI	Style/Spa	Winter Getaways	Undiscovered Islands
HI Top Mkts Circ: 458,222			HVCB SLI		HVCB SLI		HVCB SLI		HVCB SLI		HVCB SLI		
Nat. Circ: 1,044,323		KVB		KVB		KVB		KVB		KVB			
Seclect Circ: 378,788		1/6 Pg Form.		2/3 Pg Adv		2/3 Pg Adv		2/3 Pg Adv		2/3 Pg Adv			
								MVA 1/3 Pg		MVA 1/3 Pg		MVA 1/3 Pg	
			MVB	MVB		MVB			MVB	MVB			MVB
USW, IL, NY, MI Circ: 500,000				OVB		OVB					OVB		
Oct: Key Metro Markets Circ: 175,000				FP4C Adv		FP4C Adv					FP4C Adv		
USW Circ: 500,000			BIVB	BIVB						BIVB			
USW Circ: 300,000			1/2Pg sprd	4Pg Insert						SLI			
Travel & Leisure GOLF	GOLF												
HI Edit/Special Theme		Private Courses of Super Rich		Best New Golf Clubs		Summer Travel		Hot List		World's Best G. Resorts		Winter Travel & Lux Resorts	
HI Golf Mkts circ: 275,591				HVCB SLI				HVCB SLI				HVCB SLI	
	= Full circulation of publication									BIVB	Hawaii's Big Island		
	= Selected target circulation									HVCB	Hawaii Visitors & Convention Bureau		
	= West of the Mississippi									KVB	Kauai		
	= East of the Mississippi									LVB	Lanai		
	= Hawaii Top Markets									MVB	Maui		
	= Hawaii Section									MVA	Molokai		
	= OVB, program and circulation TBL									OVB	Oahu		

## 2006 Consumer Print Media Plan - HVCB Central and Island Chapters Composite

Media Representative Contacts									
Publication	Contact	Phone	Email						
Arthur Frommer's Budget Travel	Debbie Joseph	808-739-2200	<a href="mailto:josephd001@hawaii.rr.com">josephd001@hawaii.rr.com</a>						
Athlon Golf	Craig Walsh	310-864-1100	<a href="mailto:craig.walsh@athlonsports.com">craig.walsh@athlonsports.com</a>						
Bridal Connection	Lola Cohen	808-943-2992	<a href="mailto:lcohen@lolacohen.com">lcohen@lolacohen.com</a>						
Bridal Guide	Audrey Higuchi	808-737-7422	<a href="mailto:agucci2@verizon.net">agucci2@verizon.net</a>						
Brides	Lola Cohen	808-943-2992	<a href="mailto:lcohen@lolacohen.com">lcohen@lolacohen.com</a>						
Brides - Honeymoon & Weddings Away	Lola Cohen	808-943-2992	<a href="mailto:lcohen@lolacohen.com">lcohen@lolacohen.com</a>						
Bon Appetit	Kay Hampton	808-395-0088	<a href="mailto:kay@mmihawaii.com">kay@mmihawaii.com</a>						
Conde Nast Traveler	Loren Malenchek	808-283-7122	<a href="mailto:loren@hawaii.rr.com">loren@hawaii.rr.com</a>						
Coastal Living	Tonya McDonald	901-682-5114	<a href="mailto:tmcoastalliving@aol.com">tmcoastalliving@aol.com</a>						
Departures	Liane Sunn	808-377-1900	<a href="mailto:liane@sunmedia.com">liane@sunmedia.com</a>						
Family Fun	Laurie Doerschlen	808-737-4621	<a href="mailto:mdlinks@aol.com">mdlinks@aol.com</a>						
Food & Wine	Liane Sunn	808-377-1900	<a href="mailto:liane@sunmedia.com">liane@sunmedia.com</a>						
Forbes FYI	Debbie Joseph	808-739-2200	<a href="mailto:josephd001@hawaii.rr.com">josephd001@hawaii.rr.com</a>						
Golf for Women	Lola Cohen/Laurie Doerschlen	808-737-4621	<a href="mailto:mdlinks@aol.com">mdlinks@aol.com</a>						
Golf Living	Charisse Abello	213-237-3139	<a href="mailto:charisse.abello@latimes.com">charisse.abello@latimes.com</a>						
Hawaii Magazine	Lorrain Burgess	808-534-1515	<a href="mailto:lorrain@hawaiimagazine.com">lorrain@hawaiimagazine.com</a>						
Healthy Choice	Debbie Joseph	808-739-2200	<a href="mailto:josephd001@hawaii.rr.com">josephd001@hawaii.rr.com</a>						
Islands	Katie Weiss	805-745-7157	<a href="mailto:kweiss@islands.com">kweiss@islands.com</a>						
Links	Cris Hayes	310-798-4320	<a href="mailto:ch4links@aol.com">ch4links@aol.com</a>						
Los Angeles Magazine	Lola Cohen	808-943-2992	<a href="mailto:lcohen@lolacohen.com">lcohen@lolacohen.com</a>						
Midwest Living	Jodie Schafer	612-926-1171	<a href="mailto:jodie.schafer@meredith.com">jodie.schafer@meredith.com</a>						
Modern Bride	Lola Cohen	808-943-2992	<a href="mailto:lcohen@lolacohen.com">lcohen@lolacohen.com</a>						
National Geographic Traveler	Kay Hampton	808-395-0088	<a href="mailto:kay@mmihawaii.com">kay@mmihawaii.com</a>						
National Geographic Adventure	Kay Hampton	808-395-0088	<a href="mailto:kay@mmihawaii.com">kay@mmihawaii.com</a>						
San Francisco Magazine	Lola Cohen	808-943-2992	<a href="mailto:lcohen@lolacohen.com">lcohen@lolacohen.com</a>						
Southern Living	Tonya McDonald	901-682-5114	<a href="mailto:tmcoastalliving@aol.com">tmcoastalliving@aol.com</a>						
Spirit of Aloha	Sheri St. Germain	808-792-0208	<a href="mailto:sheristgermain@honpub.com">sheristgermain@honpub.com</a>						
Sunset	Gary Wiegand	808-593-3223	<a href="mailto:gwiegand@publicitas.com">gwiegand@publicitas.com</a>						
Texas Monthly	Debbie Joseph	808-739-2200	<a href="mailto:josephd001@hawaii.rr.com">josephd001@hawaii.rr.com</a>						
The New Yorker	Debbie Joseph	808-739-2200	<a href="mailto:josephd001@hawaii.rr.com">josephd001@hawaii.rr.com</a>						
Travel & Leisure	Liane Sunn	808-377-1900	<a href="mailto:liane@sunmedia.com">liane@sunmedia.com</a>						
T + L Golf	Liane Sunn	808-377-1900	<a href="mailto:liane@sunmedia.com">liane@sunmedia.com</a>						



## Online

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Avid Traveler</b>												
WSJ.com												
Discovery/Travel Channel												
<b>Outdoor Recreation</b>												
Discovery/Travel Channel												
Weather.com												
NationalGeographic.com												
NationalGeographic.com												
<b>Culture and Arts</b>												
Discovery/Travel Channel												
NationalGeographic.com												
Weather.com												
<b>Romance</b>												
Bride's.com + Modern Bride.com												
The Knot												
ModernBride.com												
WeddingChannel.com												
WeddingChannel.com												
<b>Golf</b>												
golfchannel.com - Aloha Swing												
Forbes.com												
WSJ.com												
<b>Foundational Marketing</b>												
Expedia												
Expedia												
Orbitz												
Travelocity												
Key:												

## Public Relations

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>HVCB Central</b>													
<b>News Bureau/Travel Writer Program</b>	USW/USE												
Individual multi-Island media visits													
Media website and press kit updates													
Respond to media requests													
Pitch Hawaii-based writers who contribute to U.S. mainland media outlets													
"What's New in Hawaii" press release													
<b>Niche Media Marketing</b>	USW/USE												
Apana electronic newsletter - quarterly													
Golf/sports; family; eco-tourism/soft adventure; health and wellness; culture and arts; cuisine													
<b>Golf</b>	USW/USE												
The Golf Channel "Aloha Swing" -- editorial and on-Island support													
Media Visits (6)													
Update and distribute golf press kit													
<b>National Television Initiatives</b>	USW/USE												
Based on market segments cable networks will be pursued: A&E, Fine Living, The Travel Channel, Discovery Channel, Outdoor Life Network, FOX Sports Net, History Channel													
Opportunities to work with network TV stations such as ABC, CBS, NBC, and FOX will be sought through the year via its national morning news programs and special shows													
<b>Culture and Arts</b>	USW/USE												
Hawaiian music concerts -- reviewing opportunities with WorldSound and Wolf Trap													
PBS Hawaii Cooperative TV Documentary													
Possible sponsorship and/or participation in Pacifica Hawaiian New York film festival													
New York Media Blitz - May TBD; destination and brand messaging													
<b>Hawaii Arts Season</b>	USW/USE												
Update and distribute HAS press kit													
Press Kit Mailing													
Press Releases (2)													
Satellite Media Tour to launch season													
Media Visits (10)													
Consider a press trip anchored to a significant HAS event													
<b>Fall Shoulder Season</b>	USW/USE												
Individual Media Visits													
Press Release (1)													
Aloha Festivals highlighted as part of season													
<b>Travel Media Conferences</b>	USW/USE												
TMAC, Calgary (February 18-21)													
SATW Western Regional, Philadelphia (June 2-6)													
SATW Annual Conference, Chile (October 18-23)													
Travel Media Showcase (TBD)													
Coordinate pre/post media visits in nearby secondary/tertiary markets													
<b>Sports Program</b>	USW/USE												
PR support as needed for HTA-funded programs													
Pitch Hawaii sports story ideas to local and national media encouraging to write about the Islands as a sports mecca													
<b>Sharing Aloha</b>	USW/USE												

## Public Relations

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>KVB</b>													
<b>Media Blitz</b>													
New York Blitz (Jan. 23-27)	USE	■											
Los Angeles/San Francisco Blitz (September 11-15)	USW									■			
<b>Press Trips</b>													
Northwest Outdoor Writers Association Press Trip (May 15-20)	USW/USE					■							
Romance Press Trip (October 16-21)	USW/USE										■		
<b>Individual Media/News Bureau</b>													
Individual Media Visits (10)	USW/USE												
Respond to media requests													
<b>Annual Hawaii Media Breakfast</b>			■										
<b>Other PR Elements</b>	USW/USE												
Bi-monthly KVB member newsletter													
News releases													
Crisis communications													
<b>OVB</b>													
<b>Media Blitz</b>													
Dallas/Atlanta/Birmingham/Minneapolis Blitz (Jan. 30-Feb. 3)		■	■										
San Francisco/Orange County/Los Angeles/San Diego Blitz (May 1-5)						■							
New York/Boston/Chicago Blitz (Oct. 23-27)											■		
<b>Press Trip</b>													
"Get Lost on O'ahu" Press Trip (March 2-7)	USW/USE			■									
Arts With Aloha Press Trip (Fall TBD)	USW/USE									■	■	■	
<b>News Bureau</b>	USW/USE												
Press releases													
Quarterly What's New													
Media website and press kit updates													
<b>MVB</b>													
<b>Media Blitz</b>													
Portland/Seattle/Vancouver Blitz 9 (Jan. TBD)		■											
San Diego/Orange County/Los Angeles/San Francisco Blitz (Mar. TBD)				■									
Boston/Chicago/Atlanta Blitz (May TBD)						■							
New York/Toronto Blitz (Sept. TBD)										■			
On-going													
Selected date/month		■											

## Public Relations Events Calendar

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Central</b>												
TMAC Conference, Calgary (February 18-21)												
Hawaii Arts Season Press Trip (Mar. TBD)												
SATW Western Chapter Conference, Philadelphia (June 2-6)												
Aloha Live! 2006 (tentative 12-15 cities)												
Come Experience Press Trip (Aug./Sept. TBD)												
SATW Annual Conference, Chile (October 18-23)												
New York Blitz (May TBD)												
Golf Writer Visits (4-6 media)												
Travel Media Showcase (TBD)												
<b>KVB</b>												
New York Blitz (Jan. 23-27)												
Northwest Outdoor Writers Association Press Trip (May 15-20)												
Los Angeles/San Francisco Blitz (September 11-15)												
Romance Press Trip (October 16-21)												
<b>OVB</b>												
Dallas/Atlanta/Birmingham/Minneapolis Blitz (Jan. 30-Feb. 3)												
"Get Lost on O'ahu" Press Trip (March 2-7)												
San Francisco/Orange County/Los Angeles/San Diego Blitz (May 1-5)												
New York/Boston/Chicago Blitz (Oct. 23-27)												
Arts With Aloha Press Trip (Fall TBD)												
<b>MVB</b>												
Portland/Seattle/Vancouver Blitz 9 (Jan. TBD)												
San Diego/Orange County/Los Angeles/San Francisco Blitz (Mar. TBD)												
Boston/Chicago/Atlanta Blitz (May TBD)												
New York/Toronto Blitz (Sept. TBD)												
Mainland Trips												
Media to Hawaii												

## Travel Trade

			JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
<b>Cooperative Marketing Programs</b>														
Central	USE/USW/CAN	Print/Online	Come Celebrate Aloha					Come Experience Aloha						
BIVB														
<b>Advertising Programs</b>														
Central	USE/USW/CAN	Trade Pubs TBD												
KVB	USE/USW	Travel Agent												
	USE/USW	Travelagent.com												
	USE/USW	Travel Weekly												
OVb	USE/USW	Travel Weekly												
	USW	TravelAge West												
MVB	USE/USW	Travel Weekly												
	USE/USW	Travel Agent												
	USW	TravelAge West												
BIVB	USE/USW													
<b>Shows and Product Launches</b>														
Central	USE/USW/CAN													
KVB	USE/USW/CAN													
OVb	USE/USW/CAN													
MVB	USE/USW/CAN													
BIVB	USE/USW/CAN													

## Travel Trade

MONTH	DATE	TRADE SHOW / EVENT/TRAINING/ SALES MEETINGS	LOCATION	Canada Event (Y or N)	Training Event (X = Training)	Attendance K = KVB O = OVVB M = MVB B = BIVB C = Central	MMA Allocation
JANUARY	TBD	Travelocity Hawaii Training		N	X	C	USE/USW
	TBD	ACT (Assn of Central Jersey Travel Agents) Dinner - Hawaii Night		N		C	USE
	7	Signature Travel's 28th Annual Sales Meeting & Trade Show	LAX, OC, San Jose	N		C, K, M, B	USE/USW
	TBD	2005 WESTA Preferred Supplier Trade Shows (2)		N		C	USW
	TBD	NLG's Vacation outlet 10th annual Vacation Expo (Consumer Event)		N		C	USE/USW
	TBD	Pacific Northwest Ohana Meeting (luncheon)		N		C	USW
	TBD	Expedia Call Center Hawaii Trade Show		N		C	USW
	TBD	AAA Reservation Agent Training		N	X	C	USE/USW
	TBD	Classic Custom Vacations Education Fams		N	X	M	USE/USW
	TBD	Pleasant Holidays Education Fam		N	X	M	USE/USW
FEBRUARY	TBD	Spring Industry Forums		N		C, K, O, M, B	USE/USW
	TBD	Happy Vacations - OSSN Hawaii Night		N		C	USE
	TBD	Apple Vacations Reservation Agent Training		N	X	C	USE
	TBD	Expedia.com Reservation Agent Training		N	X	C	USW
	TBD	Expedia.com Miami Call Center Hawaii Training	Miami, FL	N	X	C	USE
	TBD	Morris Murdock Int'l Travel & Tourism Show		N		C	USE
	TBD	Olympic Peninsula Travel Show		N			USE
	Feb-Dec	Team Oahu Fams	TBD	N	X	O	USE/USW
MARCH	TBD	Air Canada Vacations Reservation Agent Training		Y	X	C	CAN
	TBD	Fun Sun Vacations Hawaii Seminar		Y	X	C	CAN
	TBD	Fun Sun Vacations Ke Kula Agent Certification		Y	X	C	CAN
	TBD	Air Canada Vacations Reservation Agent Training		Y	X	C	CAN
	TBD	Holiday House Agent Training		Y	X	C	CAN
	TBD	American Airlines Vacations Spring Product Launches (2)	Dallas, Ft Worth	N		C, B	USE/USW
	TBD	Working in Travel (WITS) Monthly Dinner Meeting		N		C	USE
	TBD	American Airlines Vacations Product Launches (3)	LAX, OC, San Jose	N		C	USE/USW
	3-5	AAA Southern New England Travel Marketplace 2005		N		C	USE
APRIL	TBD	Pacific Sunspots Call Center Training		N	X	C	USW
	TBD	Companion Holidays Sales Agent Training		Y	X	C	CAN
	TBD	Holiday House Call Center training		Y	X	C	CAN
	TBD	Pacific Escapes Training - Cruise Desk		N	X	C	USW
	TBD	Gogo Spring Learning Conference - Hawaii		N	X	C, O, B	USE
	27-30	ASTA/NACTA Cruise Fest	Miami, FL	N		C, O	USE/USW
MAY	TBD	Expedia.com Miami Call Center Hawaii Partner Fair	Miami, FL	N		C	USE
	TBD	Expedia.com New Hire Training	Tacoma, WA	N	X	C	USW
	TBD	HTA Community Meetings	Honolulu, HI	N		C	USW
	TBD	New Jersey AAA Club, Hawaii Presentation		N		C	USE
	TBD	Happy Vacations Mahalo Weekend (UP FOR DISCUSSION)		N		C	USE/USW
	TBD	Travel Weekly Leadership Forum	Honolulu, HI	N		C	USE/USW
	TBD	2005 Pacifika Fil Festival Opening Event	New York, NY	N		C	USE
	TBD	Gogo VIP Dinners	TBD	N		M	USE
	TBD	Classic Custom Vacations STAR Performers	Hawaii	N		C, O, M	USE/USW
JUNE	TBD	Expedia Call Center Training	Tacoma, WA	N	X	C	USW
	TBD	Gogo Worldwide Vacations Hawaii Presentation and Training		N	X	C	USE/USW
	TBD	Apple Vacations Ke Kula Agent Training & Certification		N	X	C	USE
	TBD	Pleasant Holidays Call Center Training		N	X	C	USW
	TBD	Pacific Northwest Ohana Travel Agent Event		N		C	USW
	TBD	Norwegian Cruise Line Training		N	X	C	USE/USW
	24-28	Vacation.com International Conference and Trade Show, Caesar's Palace	Las Vegas, NV	N		C, O	USE/USW
JULY	TBD	Travelocity Ke Kula 'O Hawaii Staff Training		N	X	C	USW
	TBD	Travel Impressions Reservation Agent Training		N	X	C	USE/USW
	TBD	Pleasant holidays Call Center Training		N	X	C	USW
	TBD	Happy Vacations Aloha Fest		N		C, B	USE/USW
	TBD	Gogo/Liberty Travel Hawaii Presentation, HVCB and Island Chapters		N		C	USE
	TBD	WESTA Preferred Supplier Night		N		C	USW
	TBD	Aloha Week Chicago	Chicago, IL	N		C, B	USE
	TBD	Aloha Airlines Golf Tournament	Chicago, IL	N		C	USE
	TBD	Apple Vacations Dinner Event in conjunction with Aloha Week in Chicago	Chicago, IL	N		C	USE
	TBD	Mark Travel Event in conjunction with aloha Week in Chicago	Chicago, IL	N		C	USE

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AUGUST	TBD	NorCal Ohana Lu'au	Bay Area, CA	N		K	USW
	TBD	All About Hawaii	Portland, OR	N		K	USW
	TBD	Virtuoso 2005 Annual Travel Mart, Bellagio Hotel	Las Vegas, NV	N		C, O, M	USE/USW
	TBD	VIA (Very Important Agency) Events	TBD	N	X	M	USE/USW/CAN
SEPTEMBER	TBD	Apple Vacations Product Launches	TBD	N		B	USE
	TBD	Fall Industry Forums	Honolulu, HI	N		C, K, O, M, B	USE/USW
	TBD	NorCal ASTA Annual Hawaii Product Trade Show	Big Island	N		C, K, O, M, B	USW
	TBD	HVCB Fall Travel Industry Forum and HVCB Travel Team Meeting	Honolulu, HI	N		C	USE/USW
	TBD	SunTrips 2005 Product Launches - U.S. West		N		C, B	USW
	TBD	Funjet Fall Product Launches		N		C, B	USE/USW
	TBD	AMEX National Conference		N		C	USE/USW
	TBD	Travel Institute Forum		N		C	USE/USW
	TBD	Signature Travel Network Owners Meeting	Oahu	N		C, O	USE/USW
OCTOBER	TBD	MLT U Product Launch		N		C, B, M	USE
	TBD	MLT Hawaii Day Event (UP FOR DISCUSSION)	Minot, ND	N	X	C	USE
	TBD	Ensemble International Conference		N		C, O	USE/USW/CAN
	TBD	Hawaii World Mahalo Event - Hawaii (UP FOR DISCUSSION)		N		C	USW
	TBD	Vacation.com Regional Conference		N		C	USE/USW
	TBD	AAA National Conference		N		C	USE/USW
	TBD	Carlson Wagonlit National Meeting		N		C	USE/USW
	TBD	Hawaiian Vacations Product Launch		N		C	USW
	TBD	Travel Impressions Fall Tradeshow (UP FOR DISCUSSION)		N		C	USE/USW
	TBD	WESTA Owners & Managers Seminars		N		C	USW
	TBD	Delta Vacations VIP Dinner Seminars (Fall Only)	Atlanta (2), Cincinnati	N		C	USE
	TBD	United Airlines Vacations Fall Product Launch	DC, Denver	N		C	USE/USW
	TBD	Ensemble National Conference	Montreal	Y		C	CAN
	Oct - Dec	Oahu Destination Specialist Training Programs	TBD	N	X	O	USE/USW
NOVEMBER	TBD	Classic Marketing Partners	Hawaii	N		C, O, B	USE/USW
	6-11	ASTA World Congress	Las Vegas or Orlando	N		C, K, O, M, B	USE/USW/CAN
	TBD	Expedia Partner Fair	TBD	N		B	USW
DECEMBER	TBD	USIOA Annual Conference		N		C	USE/USW
	TBD	Luxury Travel Expo	Las Vegas, NV	N		C, K, M, B	USE/USW
DATES TBD							
	TBD	Home Based Shows (2)	TBD	N		C, M	USE/USW
	TBD	Continental Airlines Vacations Fall Product Launches (3)	Houston (2), Cleveland	N		C	USE/USW
	TBD	ASTA Regionals EAST (Includes ASTA Milwaukee)		N		C	USE
	TBD	ASTA Regionals WEST (not NorCal ASTA)		N		C, B	USW
	TBD	AAA Club Conferences		N		C, M	USE/USW
	Q1	Ensemble Training		N		C	USE/USW
	TBD	Team Oahu Road Shows (USW in Jan, Feb and USE in June)	TBD	N	X	O	USE/USW/CAN
	TBD	BIVB Destination Specialists Program (at least 6 in 2006)	TBD	N	X	B	USE/USW/CAN
	Aug & Oct	Destination Maui	TBD	N	X	M	USE/USW/CAN
	June & Sept	Maui Molokai Lanai Island Specialist Program	TBD	N	X	M	USE/USW/CAN
	TBD	Train the Trainer Programs		N	X	C	USE/USW/CAN
	TBD	Apple Vacations Product Launches (East & West)		N		C	USE/USW