



**HĀLĀWAI PAPA ALAKA'I KŪMAU O KE KE'ENA KULEANA HO'OKIPA O HAWAII'  
REGULAR BOARD MEETING OF THE HAWAII' TOURISM AUTHORITY**

**HĀLĀWAI HŌ'EA KINO A KELEKA'A'IKE  
HYBRID IN-PERSON & VIRTUAL MEETING**

**PŌ'AHĀ, 3 'OKAKOPA 2024, 9:30 AM  
THURSDAY, OCTOBER 3, 2024 AT 9:30 AM**

**Kikowaena Hālāwai O Hawai'i**  
Papahale Ho'okū Ka'a | Lumi Nui A  
1801 Alaākea Kalākaua  
Honolulu, Hawai'i 96815

**Hawai'i Convention Center**  
Parking Level | Executive Boardroom A  
1801 Kalākaua Avenue  
Honolulu, Hawai'i 96815

*E ho'olele 'iwa'ia ka hālāwai ma o ka Zoom.*

Meeting will be live streaming via Zoom.

<https://us06web.zoom.us/j/89882039888>

*E noi 'ia 'oe e kainoa me kou inoa. E 'olu'olu, e ho'okomo i kou inoa piha akā hiki nō iā 'oe ke ho'ohana i ka inoa kapakapa e like me kou makemake. E noi 'ia 'oe e hā'awi mai i kāu helu leka uila. Hiki nō ke ho'opihapiha penei, [\\*\\*\\*\\*@\\*\\*\\*\\*mail.com](mailto:****@****mail.com)*

**You may be asked to enter your name. The Board requests that you enter your full name, but you may use a pseudonym or other identifier if you wish to remain anonymous. You may also be asked for an email address. You may fill in this field with any entry in an email format, e.g., [\\*\\*\\*\\*@\\*\\*\\*\\*mail.com](mailto:****@****mail.com).**

**Kelepona / Call In: (669) 900-6833  
Helu Hālāwai / Webinar ID: 898 8203 9888**

*Hiki i ka lehulehu ke hō'ike mana'o ma o ka palapala a i 'ole ma o ka waha. E kau palena 'ia ka hō'ike mana'o waha (ma ke kino a i 'ole ma o ka Zoom) he 'elima minuke ka lō'ihī no kēlā me kēia kumuhana. E kāinoa no ka hō'ike mana'o waha ma ke pākaukau ho'okipa ma ka lumi hālāwai. E kāinoa no ka hō'ike mana'o waha ma o ka Zoom ma o ke pihi "Q&A."*

**Members of the public may provide written or oral testimony on agenda items. Oral testimony (in-person or via Zoom) will be limited to five minutes for each testifier per agenda item. Signup for oral testimony in-person will be at the registration table in the meeting room. Signup for oral testimony via Zoom will be accepted through the Q&A feature on Zoom.**

*E ho'ohui 'ia nā palapala hō'ike mana'o i hiki ma ka pū'olo hālāwai. No nā palapala hō'ike mana'o i hō'ea mai ma hope o ka pa'a o ka pū'olo hālāwai ('elua lā ma mua o ka hālāwai), e kāka'ahi 'ia nā kope i ka papa alaka'i a e mākaukau no ka 'ike 'ia e ke anaina ma ka hālāwai. E leka uila 'ia nā palapala iā Carole Hagihara-Loo ma [carole@gohta.net](mailto:carole@gohta.net), a i 'ole, e lawe kino 'ia i ke ke'ena.*

**Written testimony received ahead of the preparation of the board packet will be included in the board packet. Written testimony received after the issuance of the board packet (two business days prior to the meeting) will be distributed to the board and available for public inspection at the meeting. Email written testimony to Carole Hagihara-Loo at [Carole@gohta.net](mailto:Carole@gohta.net) or hand-deliver or mail to the Hawai'i Tourism Authority office, 1801 Kalākaua Avenue, 1<sup>st</sup> Floor, Honolulu, HI 96815.**

**PAPA KUMUMANA'O  
AGENDA**

1. *Ho'omaka*  
**Call to Order**
2. *Kikolā*  
**Roll Call to Announce Name of Participating Board Members and to Identify Who Else is Present with Board Member if Location is Nonpublic**
3. *Wehena*  
**Opening Protocol**
4. *Hō'ike O Nā Hālāwai 'Ae 'Ia*  
**Report of Permitted Interactions at Informational Meetings or Presentations Not Organized by the Board Under HRS section 92-2.5(e)**
5. *'Āpono Mo'olelo Hālāwai*  
**Approval of Meeting Minutes**
  - a. August 29, 2024 Regular Board Meeting
  - b. September 13, 2024 Special Board Meeting
6. *Hō'ike A Ka Luna Ho'okele*  
**CEO Report**
7. *Hō'ike A Ka Luna Ho'omalu Papa Alaka'i HTA*  
**Board Chair Report**
8. *Hō'ike'ike A Ka Papahana Mālama 'Āina Ho'okipa*  
**Presentation on HTA Destination Stewardship Programs**
9. *Hō'ike'ike A Kūkā No Nā 'Ike A Kūlana Mākeke I Hawai'i A Me Nā Mākeke Kipa Nui*  
**Presentation and Discussion of Current Market Insights and Conditions in Hawai'i and Key Major Hawai'i Tourism Markets**
10. *Hō'ike'ike, Kūkā, a Ho'oholo No Nā Papahana Alowelo Makahiki 2025*  
**Presentation, Discussion, and/or Action on CY2025 Brand Marketing Plans**
  - a. Meet Hawai'i
  - b. Hawai'i Tourism USA
  - c. Hawai'i Tourism Japan
  - d. Hawai'i Tourism Canada
  - e. Hawai'i Tourism Oceania
  - f. Hawai'i Tourism Europe
  - g. Hawai'i Tourism Korea
  - h. Hawai'i Tourism China
11. *Kūkākūkā a Ho'oholo No Ka Mo'olelo Kālā*  
**Discussion and Action on HTA's Financial Reports for July and August 2024**

12. *Hō'ike'ike, Kūkā, a Ho'oholo No Ka Ho'ohana Hou I Ka Pu'u Kālā Pōulia*  
**Presentation, Discussion, and/or Action to Approve Additional Expenditure of Tourism Emergency Special Fund Monies Relating to Maui Recovery**
13. *Hō'ike A Ka Hui Noi'i Hō'ulu'ulu Ho'omalū*  
**Report of the Governance Study Permitted Interaction Group**
14. *Kūkākūkā No Ka Ho'okuleana I Nā Kōmike Me Nā Hui Noi'i*  
**Discussion on the Membership of Standing Committees and Permitted Interaction Groups**
15. *Kūkākūkā A Ho'oholo No Ka Ho'okumu I Kōmike Ho'okō*  
**Motion, Discussion and Action to Create an EXECUTIVE STANDING COMMITTEE for the Purpose of Guiding Tourism Policies and the Authority's Strategic Direction**
16. *Kūkākūkā A Ho'oholo No Ka Ho'ololi I Ke Kuleana O Ke Kōmike Ho'okele A Hō'ōia Motion,*  
**Discussion and Action to Change the Purpose of the ADMINISTRATIVE & AUDIT STANDING COMMITTEE by Deleting the Sentence: "The Committee Shall also be Responsible for Matters Relating to Legislative and Governmental Affairs"**
17. *Ho'oholo I Ka Ho'okuleana I Nā Kōmike Me Nā Hui Noi'i*  
**Action to Elect Board Members to Standing Committees and Permitted Interaction Groups**
18. *Ho'oku'u*  
**Adjournment**

\*\*\* *'Aha Ho'okō: Ua hiki i ka Papa Alaka'i ke mālama i kekahi hālāwai kūhelu i kū i ka Hawai'i Revised Statutes (HRS) § 92-4. E mālama 'ia kēia hālāwai kūhelu nei ma lalo o ka § 92-5 (a)(4), § 92-5 (a)(8) and §201B-4(a)(2) no ka pono o ko ka Papa Alaka'i kūkā a ho'oholo 'ana i nā nīnūnē a nīnau i pili i ko ka Papa Alaka'i kuleana me ko ka Papa Alaka'i loio. He hālāwai kūhelu kēia i 'ole paulele 'ia ka 'ikepili a i mea ho'i e mālama kūpono ai i ko Hawai'i 'ano, he wahi i kipa mau 'ia e nā malihini.*

\*\*\* Executive Session: The Board may conduct an executive session closed to the public pursuant to Hawai'i Revised Statutes (HRS) § 92-4. The executive session will be conducted pursuant to HRS § 92-5 (a) (2), § 92-5 (a)(4), § 92-5 (a)(8) and §201B-4(a)(2) for the purpose of consulting with the board's attorney on questions and issues pertaining to the board's powers, duties, privileges, immunities, and liabilities; to consider hiring and evaluation of officers or employees, where consideration of matters affecting privacy will be involved; and to discuss information that must be kept confidential to protect Hawai'i's competitive advantage as a visitor destination.

*Ma lalo o ka māhele 531.5 o ka Budgetary Control Accounting Manual, Moku'āina 'o Hawai'i, he māhele ka 'aina awakea o ka hālāwai. E mau ana ka hālāwai ma loko nō o ka 'ai 'ana, 'a'ole ho'i ia he wā ho'omalolo.*

Pursuant to Section 531.5, of the Budgetary Control Accounting Manual, State of Hawai'i, lunch is served as an integral part of the meeting, while the meeting continues in session, and not during a break.

*Inā he lawelawe a mea like paha e pono ai ke kīnānā, e ho'oka'a'ike aku me Carole Hagihara-Loo ma (808)-973-2289 a ma ka leka uila e like me ka wikiwiki i hiki, 'a'ole ho'i a ma 'ō aku o ka 'ekolu lā ma mua o ka hālāwai. Inā 'ike 'ia he noi i ka lā ma mua o ka hālāwai, e ho'ā'o mākou e 'imi i ka lawelawe a mea like paha, 'a'ole na'e ho'i e hiki ke ho'ohiki 'ia ke kō o ua noi lā. Ua noa pū kēia ho'olaha ma nā kino 'oko'a e like me ka mea pono.*

If you need an auxiliary aid/service or other accommodation due to a disability, contact Carole Hagihara-Loo at (808) 973-2289 or [carole@gohta.net](mailto:carole@gohta.net) as soon as possible, preferably no later than 3 days prior to the meeting. **Requests made as early as possible have a greater likelihood of being fulfilled.** Upon request, this notice is available in **alternative/accessible** formats.

*E like nō me ka 'ōlelo o ke Kānāwai Hawai'i i ho'oholo 'ia māhele 92-32.7, 'a'ole e mālama ana ke Ke'ena Kuleana Ho'okipa o Hawai'i i kekahi wahi ka'awale no ka lehulehu a lālā papa alaka'i e nānā a e komo ai i ka hālāwai ma ka ho'ohana i ka 'enehana komo hālāwai, no ka mea, hiki nō i ka po'e o ka lehulehu a lālā papa alaka'i ke nānā a komo pū ma ka hālāwai hō'ea kino.*

In accordance with HRS section 92-3.7, the Hawai'i Tourism Authority will not establish a remote viewing area for members of the public and board members to view and participate in meetings held using interactive conference technology (ICT) because there will be an in-person option for members of the public and board member to view and participate in the meeting.

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**Approval of Minutes**

- a. Regular Board Meeting, August 29, 2024**
- b. Special Board Meeting, September 13, 2024**



Ke'ena Kuleana Ho'opipa O Hawai'i  
1801 Kalākaua Avenue  
Honolulu, Hawai'i 96815  
**kelepona** tel 808 973 2255  
**kelepa'i** fax 808 973 2253  
hawaii tourismauthority.org

**REGULAR BOARD MEETING  
HAWAII TOURISM AUTHORITY  
Thursday, August 29, 2024, 9:30 a.m.**

**Hybrid In-Person & Virtual Meeting**

**Hawai'i Convention Center**  
Parking Level | Executive Boardroom A  
1801 Kalākaua Avenue  
Honolulu, Hawai'i 96815

**MINUTES OF THE REGULAR BOARD MEETING**

**MEMBERS PRESENT:**

Mufi Hannemann (Chair), Mahina Paishon (Vice Chair), Kimberly Agas (Zoom), David Arakawa, Stephanie Iona, James McCully, Blaine Miyasato, Roy Pfund, James Tokioka (Ex Officio, DBEDT Director), Chris West (Zoom), Mike White (Zoom)

**HTA STAFF PRESENT:**

Daniel Nāho'opi'i, Kalani Ka'anā'anā, Caroline Anderson, Jadie Goo, Talon Kishi, Ilihia Gionson, Maka Casson-Fisher, Carole Hagihara

**GUESTS:**

Jennifer Chun, Luis Salaveria, Erin Khan, Teri Orton, Mari Tait, Jessica Lani Rich, Jeffrey Eslinger, Laci Goshi, Frances Kuba, Daniel Ito, Jon Itomura, Norman Powell, Dennis Rogers, Madison Kerley, Jordan Valencia, Belle Alic, Denise Booth, Tracey Schneider, Shanon Powell, AJ Diggs, Krislyn Hashimoto, M. Jamshida, Sophia Gibson

**LEGAL COUNSEL:**

John Cole

### **1. Call to Order**

Chair Hannemann called the meeting to order at 9:43 a.m.

### **2. Roll Call to Announce Name of Participating Board Members and to Identify Who Else is Present with Board Member if Location is Nonpublic**

Mr. Gionson did the roll call, and all Board members were in attendance. Members who attended via Zoom were by themselves.

### **3. Opening Protocol**

Mr. Casson-Fisher conducted the opening cultural protocol.

### **4. Report of Permitted Interactions at Informational Meetings or Presentations Not Organized by the Board Under HRS section 92-2.5(e)**

There was no input on Permitted Interaction Groups.

### **5. Approval of Meeting Minutes of the June 25, 2024 Regular Board Meeting**

Mr. Arakawa proposed the motion to adopt the minutes, and Ms. Paishon seconded. The motion passed unanimously.

### **8. Presentations by HTA Community Program Partners**

Chair Hannemann introduced presentations by the HTA Community Program Partners, noting that the forthcoming Okinawan Cultural Festival would be a great showcase for the facilities of the HCC. Two recent events, the Pokémon Convention, and the Made in Hawai'i Festival, had shown off the HCC to its best advantage.

Chair Hannemann introduced Mr. Norman Powell, a star of the LA Clippers. This team always made a preview trip to the Islands before their game against the Golden State Warriors, which was scheduled for October 5 at the Stan Sherriff Center.

Mr. Powell greeted the Board members and stated that this was the fifth time the team had visited Hawai'i. The staff and the players always appreciated their time on the islands. The following day, they were to visit Lahaina High School.

Mr. Dennis Rogers, the Vice President of Communications for the LA Clippers, echoed Mr. Powell's thanks and stated that he was proud to visit Hawai'i. He appreciated the Hawaiian culture and was glad to have the opportunity to contribute in return with an in-person experience. He explained that this was his second year to visit Hawai'i with the Clippers. He

recalled that on his first visit in 2016, he was a member of the team playing against the Clippers. He commented that the support for the NBA in Hawai'i was amazing. He and Mr. Powell brought gifts for everyone, including jerseys, personalized Clipper shirts, and basketballs.

Chair Hannemann informed Board members that the Clippers would be joined by Ms. Denise Booth, the Clippers' Chief Diversity and Inclusion Officer, who always worked with the HTA to identify a public school where the Clippers would renovate and upgrade a classroom, emphasizing technology. This year, the recipient school would be Ānuenue Elementary School in Pālolo. The school staff and Principal were excited about the renovations, including renovation of their basketball court. In addition, the Clippers were to hold a basketball clinic.

The Chair added that the Golden State Warriors would be visiting the North Shore, and their coach was the coach of the Olympic team. Chair Hannemann thanked the Clippers for their hospitality when he had recently visited Los Angeles. He had visited their new state-of-the-art facility called the Intuit Dome. He had met the owner of the Clippers as well as the agent for negotiations for their tour of Hawai'i. The Chair noted that Hawaiian-born Bruno Mars had opened the Intuit Dome.

Chair Hannemann thanked Mr. Powell and Mr. Rogers for their visit.

At the request of Vice-Chair Paishon, Chair Hannemann shared Governor Green's comments during a recent visit to Kaua'i about the importance of sports. The Governor stated that he saw sports tourism as a good opportunity for the State to attract high-caliber events such as professional sports and athletic programs; the Governor had expressed his appreciation for the partnership of the HTA.

Mr. Powell introduced his mother to Board members, commenting that she had made him understand that anything was possible and had made sacrifices to ensure his future. Ms. Powell thanked the HTA Board for hosting them and expressed her appreciation for the work of the HTA.

Chair Hannemann noted that the Clippers had visited Kaua'i in previous years, but this year, the HTA had recommended Maui. The Clippers were to visit Lahaina and would call on the mayor during their visit.

Chair Hannemann introduced a presentation about the 42<sup>nd</sup> Okinawan Festival and welcomed the Festival Chair, Ms. Frances Kuba, and Mr. Jon Itomura, the Hawai'i United Okinawan Association (HUOA) Executive Director. The Chair explained that Ms. Kuba was the President-Elect of HUOA as well as the Chair of the Festival Committee.

Ms. Kuba and Mr. Itomura brought gifts for the Board members and Invited members to join them on Saturday, August 31, from 5.30 p.m. to 9 p.m. for the largest indoor Bon Dance. Awamori distilled spirits from Okinawa would be available, and their special flavors would



combine two cultures. The festival team had brought freshly made special food.

Mr. Arakawa reminded the Board members that Chair Hannemann had been adopted as the tallest Okinawan in 2006 when Okinawans worldwide assembled in Okinawa. Chair Hannemann pointed out that Mr. Arakawa was always conscious of the festival's importance. Members of the vibrant Okinawan community in Hawai'i had never forgotten their roots.

Ms. Kuba gave a slide presentation and noted that the festival could not take place without the support of the HTA. She explained that HUOA was a non-profit 501(c)3 organization with more than 46,000 members in Hawai'i. The HUOA headquarters was in Waipio, and they had recently broken ground on a nearby site for a Starbucks branch.

HUOA supported many community events, such as student exchanges and many festivals, including an annual children's festival, a children's camp, and senior health events. HUOA honored community leaders. Ms. Kuba reminded Board members that Hawai'i and Okinawa had a strong connection. New officers returned to Okinawa every year for an Aisatsu or goodwill visit. In May 2025, the 125<sup>th</sup> anniversary of Okinawan emigration to Hawai'i will be celebrated, and the whole world will be invited to come to Hawai'i.

Mr. Itomura mentioned that the present community members were fifth or sixth-generation immigrants who had arrived in Hawai'i in 1900. During the present month, six groups of students ranging from junior high school to high school were visiting O'ahu, the Big Island, and Maui. It was heartwarming to see the students not only learning about the historical relationship between the two regions but also understanding the importance of this relationship because Hawai'i and Okinawa shared such a similar history.

The association also ran a program to welcome students from Okinawa to attend high schools in Hawai'i. The hosts would be families with a high school student whom the Okinawan student would shadow. In June, Hawaiian high school students would do the same thing in Okinawa.

Mr. Itomura stated that HOUA had recently completed a campaign to help Maui. He noted that the \$672,000 raised was based on the Yen's recent weakness. The amount had initially been much higher. He added that while HOUA had been raising funds for Maui in Hawai'i, there had been prefecture-wide fundraising in Okinawa. Every time he visited Okinawa, he saw collection boxes in every municipality, which were always full. There were donations from the Governor, the Mayors, and residents of Okinawa, with contributions from large corporations and small businesses.

The forthcoming festival would provide hours of entertainment and bring the Hawaiian culture to a worldwide audience, not just people of Okinawan heritage.

Ms. Kuba reminded Board members that the 42<sup>nd</sup> Okinawan Festival was to take place at the HCC, which the staff already arranged. The theme was "Sharing Uchinanchu Aloha," and more than 3,600 volunteers would completely run the festival. Ms. Kuba urged Board members to

visit the festival. There were to be 15-second promotion slots on HINowDaily.com every day, and the organizers would collaborate with the media outlet throughout the week. The following day, the news outlet was to carry live content from the festival. Statistics showed that there was to be a national TV audience of 223,000, an online audience of 567,000, and social media reaching 3.4 million views.

Ms. Kuba shared the festival map and reminded Board members that the festival offered something for everyone, including children's games, robotics, plants, and T-shirts. Many products had been imported from Okinawa, but local vendors were also supported. There would be two days of continuous live entertainment, including an indoor Bon Dance from 5.30 p.m. to 9 p.m. on Saturday.

Mr. Itomura thanked the HTA for their assistance in organizing the festival to attract all ethnicities.

Chain Hannemann thanked HUOA and noted that this was an excellent example of destination stewardship. This event used to be an annual tradition at Kapiolani Park, and he congratulated the HCC General Manager, Ms. Teri Orton, and her staff for making HCC available. He encouraged all Board members to tell their friends and neighbors about this event. It was an honor for the HTA to be part of this festival, which involved the whole of Hawai'i, not just the Okinawan community. He thanked Mr. Arakawa for ensuring that Board members were informed.

Mr. Arakawa referred to the partnership with local businesses and noted that the Convention Center had created a beer garden as an experiment. He added that they tried to partner with hotels every year to publicize HCC and encourage guests to visit the center. He noted that the previous year, HCC held a sustainability program in which Genki Balls were thrown into the Ala Wai canal to clean up the water environment. Ms. Orton had arranged for this activity to take place during the Okinawan Festival. Mr. Arakawa also noted the hope that Hawaiian Airlines would support the festival at the corporate level.

Mr. Arakawa reminded Board members that the following year, the festival was expected to attract many visitors, not only from Japan but also from South America. The HCC was to carry out some live streaming, and HUOA was picking up suggestions from HCC. Future events at the Convention Center would benefit from the live-streaming experiments conducted during the Okinawan Festival.

Mr. Itomura noted that many of the 3,600 – 4000 festival volunteers would be lodging in area hotels during the coming weekend, some starting early that evening. An oral survey of their lodgings was to be taken.

Chair thanked Ms. Kuba and Mr. Itomura.

## 6. CEO Report

Chair Hannemann introduced Agenda Item 6, which was to be presented by Mr. Nāho'opi'i.

Mr. Nāho'opi'i explained that his presentation would be very short since most of the information was already in the material provided to Board members.

Mr. Nāho'opi'i informed Board members that King Tuheitia of Aotearoa had recently passed away. The late King had led the delegation from Aotearoa during the recent Festival of Pacific Arts and Culture (FestPAC). Mr. Nāho'opi'i asked Mr. Ka'anā'anā, intimate with the late King's family, to comment.

Mr. Ka'anā'anā stated that the King had passed away peacefully, surrounded by his wife and three children. The family and the whole of the Aotearoa community would be in the prayers of everyone. The late King had been an inspirational leader and a driving force in the Tuuruma Ariki Declaration signed on Kamehameha Day the past June in the Throne Room of 'Iolani Palace. This brought to fruition King Kalakaua's vision of greater cooperation between Pacific Island nations to address issues such as climate change. Hawai'i deeply mourned this loss but knew that his work would continue. Mr. Ka'anā'anā had been privileged to celebrate the 18<sup>th</sup> anniversary of the King's coronation, during which he had an audience with His Majesty and his family and reaffirmed the relationships between Aoteia and Hawai'i developed during FestPAC.

Mr. Nāho'opi'i asked Mr. Gionson to give some background about the forthcoming Fall Tourism Conference and Fall Tourism Week scheduled for October.

Mr. Gionson said he was looking forward to welcoming everyone in a little over a month. There would be panels, keynote speakers, breakout sessions, and special guests. Between September 30 and October 2, there would be three days of programming at HCC, followed by internal meetings on the afternoon of October 2 with the HTA global marketing teams, who would all be in town. There would be a Board meeting on October 3, and on October 4, all the teams would participate in a FAM on Maui to investigate new and old activities for visitors on the island.

Mr. Gionson informed Board members that registration for the three days of the conference was open at [hawaiiourisauthority.org](http://hawaiiourisauthority.org). Ms. Orton and the staff of the HCC were collaborating with Ms. Lee Ann Choy of Pacific Rim Concepts. The HTA staff were developing programming on agritourism, capacity-building, regenerative tourism, use of geolocation insights, and island-by-island marketing strategies. Case studies such as the transformation of Haena State Park were to be presented. Participants will learn about what Hawai'i offers as a world-class arts destination. The second night of the conference would feature a food and wine event and the annual tourism legacy awards. Board members were to be given a special registration link.

Mr. Gionson stated that early registration was \$300, including all events and all meals, increasing to \$375 in two weeks.

Mr. Nāho'opi'i added that the conference was a partnership with the Hawai'i Lodging and

Tourism Association (HLTA), the Hawai'i Visitor and Convention Bureau (HVCB), the Council for Native Hawaiian Advancement (CNHA), and Kilohana. All four agencies had been working on identifying the types of sessions that would benefit members of the various industry sectors. Contractors from international offices and local contractors such as Kilohana and Anthology would participate in working sessions during the week. During the afternoon of Wednesday, October 3, there would be internal meetings focusing on developing strategies and additional training, as well as using additional information from Brand USA, the national marketing organization. The focus would be to investigate how the HTA could fit better into international branding campaigns to take advantage of federal funds put aside for that purpose. Teams would also work with Miles Media, responsible for the website and other marketing issues.

Chair Hannemann congratulated the staff for working hard to plan the conference. He also thanked Board members who had participated in planning meetings or shared their input. The Chair looked forward to the strong perspective of Brand USA. The Assistant Secretary for Tourism in the U.S. Department of Commerce would attend the conference and was to provide remarks as representative of the U.S. Secretary of Commerce.

The Chair also looked forward to the video message to be contributed by Mr. Bill Hornbuckle, the Global Head of MGM. As Chair of the Travel and Tourism Advisory Board, Mr. Hornbuckle was to provide his input on the role of Hawai'i in the tourism industry. Governor Green and other elected officials were expected to participate in panel discussions. Government departments working closely with the HTA would also participate in panel discussions. This was why the Chair had asked for the Board meeting to be scheduled for October 3, rather than the end of September, to take advantage of the presence of all the HTA contractors and partners at the conference. The Board meeting would wind up the Fall Tourism Week. The Chair emphasized the importance of encouraging registration.

Mr. Nāho'opi'i thanked the Chair for his comments and asked for questions.

Mr. Arakawa thanked Mr. Gionson for the presentation. Mr. Arakawa stated that he worked closely with government departments, and some who wished to be present had not yet been contacted; Mr. Arakawa asked the HTA staff to follow up, especially with the Department of Transportation, whose presence was desirable. He thanked staff for including other departments, such as the Department of Land and Natural Resources (DLNR). The staff members promised that follow-up would be done.

The Chair and Mr. Nāho'opi'i had also been reaching out to their contacts.

Mr. Nāho'opi'i stated that Ms. Orton had asked about the participation of students from the University of Hawai'i TIM School at the tourism conference. Ms. Anderson replied that there was a special rate of \$75 for students. There was also an opportunity for those attending the conference to host a student. Ms. Jennifer Chun was working with all the universities to arrange for student volunteers.

Mr. Gionson added that this included the University of Hawai'i TIM School as well as the departments of tourism at HPU and UIU. Since school was just getting back into session, there would be more engagement during the coming weeks.

Mr. Gionson updated Board members on three tropical storms, Hone, Gilma, and Hector, which were being tracked. Hone had impacted the Hawaiian Islands with rain and wind over the weekend. The HTA staff had been in contact with HIEMA and had communicated with industry partners. Mr. Gionson noted that Storms Gilma and Hector appeared likely to have a lower impact. Staff monitored the storms and engaged with emergency management officials at State and County levels. It was important to share messages, warnings, and helpful tips with industry partners to inform visitors about access to parks, trails, and beaches.

Mr. Nāho'opi'i continued that the remainder of his report concerned the budget. The staff had been involved in budget preparation during the July/August period, focusing on the HTA's overall mission to strategically manage tourism in Hawai'i and balance economic, cultural, and community aspects and natural resources. Balance was important if goals were to be achieved. External conditions were also a factor.

DBEDT recently issued the final statistics for 2023, indicating that a severe condition needed to be considered when planning the budget. Total expenditures had increased nominally by 18%, but if these were adjusted for 17% inflation, actual expenditure was about 10% down on pre-COVID figures. The aim was to increase visitor spending and thus increase tax revenue. This called for different approaches and strategies, such as rebuilding the number of international visitors because they spent more time in Hawai'i during their shorter time there. It was also necessary to increase participation in visitor activities so that spending would increase. Such activities might include participating in tours, attractions, and voluntourism, buying local products, and eating at local restaurants.

Mr. Nāho'opi'i informed Board members that the strategy for the next five years would involve three levels of goals.

For Fiscal Year 25 (FY25) and the beginning of FY26, the focus would be to recover domestic demand and rebuild international demand because international visitors typically spend more and take part in more activities. It was hoped that by FY26/27, destination management programs would be established on each island. The Governor proposed and recently approved the hiring of five destination managers.

The second goal was to focus on the issues emphasized during the governance study and work with communities at the island and County levels to drive progress for each island. Much of destination stewardship dealt with events at the level of the Counties and the islands. It was important to ensure that personnel had a structure for decision-making based on feedback.

The final level was to be implemented in five years. By that time, tourism should be wholly regenerative and would contribute more to communities. The overall impact of visitors would

be positive for residents and communities, creating a type of tourism, such as cultural tourism, which could add dollars at the community level and positively increase expenditure but would not require additional infrastructure or mitigation of environmental damage.

Mr. Nāho'opi'i explained that he had been collaborating with Kilohana to identify programs and find new organizations and types of tourism that could be brought to Hawai'i. All Board members had been working to build the budget, including examination of existing contracts. For FY25, there had been a 10% restriction, which meant that some work had to be reduced or postponed to a future year, hoping to catch up. Frequent messaging was needed to build up awareness and bring about changes in behavior.

Mr. Nāho'opi'i informed Board members that staff had worked with the standing committees and had submitted the budget to the Budget, Finance, and Convention Center (BFCC) Standing Committee. The budget was first to be submitted to the Governor, who would then send it to the Legislature with his recommendations. Some committee-level discussions would take place before getting into budget line items.

Chair Hannemann thanked Mr. Nāho'opi'i.

Ms. Iona informed Board members that she and members of the administration had been inspired by Mr. Gionson's presentation on the island of Kaua'i.

Mr. Gionson thanked Ms. Iona. Mr. Ka'anā'anā explained that the presentation on Kaua'i had been part of a two-day Foundational Technical Assistance program run by Kilohana. The first day had been taken up by high-level discussions about the tourism industry and how small businesses could enter it. On the second day, there were more detailed discussions, extended panel discussions, and a resource fair for partners. Mr. Ka'anā'anā thanked Kilohana, the panelists, and the vendors. Two Foundational Technical Assistance programs had taken place on each of the four major islands, ending with Hawai'i Island during the past week.

Mr. Ka'anā'anā stated that Mr. Gionson had led three sessions and participated in others. Feedback had been positive. Member Pfund informed Board members that Margo had been one of the panelists at the recent session on Hawai'i Island. Industry members had seen how the HTA was transforming tourism. The training sessions were born from the feedback of the Destination Management Action Programs (DMAPs). Thanks were due to Ms. Caroline Anderson, the island chapter staff, and the destination managers of each island. The success of this program was due to team effort. There was room for improvement in attendance, but this was a new program, and there would be more awareness in future years.

Ms. Iona pointed out that many people had participated on Zoom. She had received much positive feedback. County and University staff who participated had assured her that they would make a big effort the next time the program took place.

Mr. Gionson reminded Board members that the program had been born from the technical

needs assessment conducted by Kilohana. This was the Foundational Technical Assistance track, while Community Tourism Collaboratives would be organized for more advanced businesses. Some organizations would be selected to participate in the two threads of community stewardship and regenerative experience development. The program had been recorded on Zoom, and since all the sessions featured different speakers and panelists, the Zoom recordings would form an online library for those unable to attend.

Ms. Iona referred to Chucky “Boy” Chuck and his museum on Kauaʻi. Everyone who worked in his shop had been informed. Ms. Iona believed that the Managing Director of the Kauaʻi island Chapter and Kauaʻi Visitors Bureau Executive Director at HVCB, Ms. Sue Kanoho, would be proud of what had been achieved.

Mr. Kaʻanāʻanā expressed his appreciation to the Kilohana Director of Destination and their staff and those on the ground team who had worked hard.

## **7. Board Chair Report**

Chair Hannemann informed Board members that he would give just a few highlights since the Board handout contained many details.

Firstly, on the previous day, he attended a wonderful Chamber of Commerce meeting in Kauaʻi. The Governor’s speech explained that a healthy State must also contain a healthy tourist economy. The Chair said that the Governor had been lucid in explaining his vision of Hawaiʻi, of which the tourism industry formed a large part. Chair Hannemann intended to request copies of the Governor’s speech for Board members.

The Chamber of Commerce meeting had been a microcosm of how the Hawaiʻi community should be. Every sector of Kauaʻi was included, and the businesses represented were concerned with tourism and agriculture, health care, and social services. A range of government officials had attended: Mayor Kawakami, Representative Nakamura, and Ms. Sarah Blane, among others. The meeting had been an ideal opportunity to hear about what was happening on Kauaʻi. The venue was Outrigger Kauaʻi Beach Resort. Topics discussed included destination stewardship, destination marketing, and workforce development. The University of Hawaiʻi athletic director was present, and this was a reminder that the HTA hoped to do more with the community and sports.

Chair Hannemann’s second point concerned the saturation mission in Southern California. He thanked the Board for approving the expenditure of \$1.6 million for this exercise. This could not have come at a better time since this area was Hawaiʻi’s most important domestic market. The HVCB and Mr. Jay Talwar had worked tirelessly to help consumers understand that there was a new message: “The People, the Place, the Hawaiian Islands.” Visitors needed to return to Hawaiʻi. The Chair appreciated the involvement of Governor Green, Mayor Bissen, and some elected officials. The private sector was engaged and ready to be part of the campaign either by

partnership or support. Incentives were to be laid out, using digital or social media, to persuade consumers that this was a good time to return to Hawai'i.

The Chair informed Board members that the following week, some legislators were to take part in a trip to Tokyo, and Mr. Eric Takahata, the Managing Director of Hawai'i Tourism Japan, would be involved. This visit would take advantage of the Tokyo Expo, Asia's largest tourism trade show, scheduled for the same period. There will be key meetings with partners in Japan to underscore the importance of the Japan market. The Chair acknowledged the importance of the marketing suggestions made by Mr. Miyasato, the Chair of the Branding Standing Committee.

Chair Hannemann's third point concerned the budget. He sought opinions and comments from several quarters and appreciated the work done by Mr. Arakawa and the BFCC Committee. However, he believed that the budget was an important issue that required input from everyone. He reminded Board members about the challenges of the previous session after two years when the HTA had been defunded. Obtaining a \$63 million budget, funds to hire a new CEO and increase their salary, and funds to hire a new Chief Branding Office and raise their salary, as well as a recurring budget with a base from which to start every year, had been an achievement which many people had previously described as impossible.

The Chair stated that he had invited the Hawai'i Director of Finance, Mr. Luis P. Salaveria, to make a presentation to the Board during an Executive Session later in the present meeting. Director Salaveria was to explain the financial outlook and the administration's plan for the future. Dir. Salaveria was the person upon whom the Governor relied for fiscal policies and budget strategy. He was to join Board members for lunch and then address them at 1 p.m., after which there would be a robust discussion about the budget and related matters.

There were no questions either from Board members or from the public online.

## **9. Presentation on HTA Destination Stewardship**

Mr. Ka'anā'anā introduced Mr. Daniel Ito (Communications and Marketing Director from CNHA), who would give the presentation on destination stewardship and noted that this followed on from the previous account of stewardship activities organized by Kiloana.

Mr. Ito explained that he was standing in for Mr. Tyler Gomes. He thanked Mr. Gionson for the information about tropical storm tracking and noted that he, Mr. Gionson, and Mr. Ka'anā'anā had experienced Storm Hone firsthand. He thanked the Board members for their kind words about the Foundational Technical Assistance program and noted that the Board handout contained detailed information.

'Umeke, the application portal, opened on August 1, and so far, 85 applications have been received, of which four were already submitted. The most popular sector of activity was



community enrichment, cited by 44 applications. Seven in-person information sessions had been scheduled, and six had taken place, one on each island and two on Hawai'i Island, with a total attendance of 48 people. Lanai's in-person session had to be changed to a virtual session because there was no registration. Finally, nine people attended the Lanai virtual session. Two other virtual sessions had taken place with a total of 188 registrants. Again, community enrichment was the most popular topic. An information booth would be set up at the Native Hawaiian Convention scheduled from September 17 to 19, allowing people to talk directly to the destination stewardship director about possible issues with their application or the portal. The portal was to close at 4.30 p.m. on September 20.

Mr. Ito informed Board members that Foundational Technical Assistance (FTA) workshops had been held on all the islands, and he thanked Ms. Iona for praising the Kaua'i FTA program. He pointed out that Ms. Rebecca Soon and her team from Solutions Pacific & Ward Research were doing a fabulous job.

Referring to Mr. Gionson's comments, Mr. Ito confirmed that Community Tourism Collaboratives (CTC) had just been rolled out, and both technical assistance and funding were to be awarded to nine selected organizations. Awards ranged from \$18,500 to \$50,000. The gohawaii.com website carried the press release; details were included in the Board handout.

Kilohana had recently launched Qurator, a quality assurance program. Mr. Ito noted that 110 organizations had registered, and 21 were already certified. As with any new program, there were some bugs to be rectified, and there was a slight lag between businesses applying and being certified, but this was corrected. The quality assurance manager, Mr. John Peel, had attended Destinations International in Tampa, FL. The program was well known among the sustainability and DEI professionals at Destinations International, attesting to the efficacy of the public relations department.

As requested by the HTA and the Destination Stewardship Director, more Visitor Education Post Arrival Marketing (VEPAM) displays would be shown at baggage claims to promote partnership events, focusing on curating multicultural experiences. These advertisements were to go live on September 2 at baggage claims and digital platforms.

Mr. Ito asked for questions and comments from Board members.

Vice-Chair Paishon thanked Mr. Ito for his presentation and asked whether there were major barriers or challenges that the Board should help to address. Mr. Ito replied that the work had been very robust as they had moved into the third quarter, and he believed that support might be needed to work alongside Miles Media to update content on the website and the Qurator program. He knew that the Destination Stewardship Director was well aware of the issues. Mr. Ito hoped that the issue could be resolved so that content could be displayed faster.

Vice-Chair Paishon thanked Mr. Ito and asked Mr. Ka'anā'anā and Ms. Anderson the same question.

Mr. Ka'anā'anā replied that the issues related to resources. Upon initially looking at the scope of the work, the best judgments had been made with the available information. Still, the Kilohana contract had just passed its first anniversary, signed on August 4, 2023. Resources were tight for Kilohana in terms of both finances and staff. 'Umeke was a collective program of the HTA signature events. Considering community enrichment, Kahu 'Āina, Kukulu Ola, and resort area Hawaiian culture initiative alone, there were 158 contracts, and only four or five positions were authorized within the approved scope of work. This meant that staffing was very tight. Firstly, the need for more resources was reflected in the FY26 request. Secondly, they were trying to improve how content was transferred from the stewardship side onto the various programs.

Mr. Ka'anā'anā informed Board members that the gohawaii.com website would be revamped under the FY26 budget. This website was a powerful tool that created good engagement. Some users stayed on its pages for an extended period, and it was clear that visitors were using the site. The intention was to add the seal for Qurator to Gohawaii.com so that the 21 now-certified businesses could be listed.

#### **10. Report of the 2024 Legislative Permitted Interaction Group**

Member McCully reminded Board members that in September 2023, a Permitted Interaction Group (PIG) was established to deal with matters in the 2024 legislature. He also reminded members that PIGs operated on tasks, not on calendar schedules. This would be their second report and the third of their required actions. The public could review the report at a subsequent "Sunshine" meeting.

The report of the PIG described the session outcomes of three bills.

Bill 1800 was the HTA budget bill, allocating \$63 million in operating funds, an expenditure ceiling of \$34 million for the Hawai'i Convention Center (HCC), and \$64 million in bond funding for HCC repairs. This had been a great result compared with the outcomes of previous sessions. The Legislature had imposed restrictions by defining program IDs, which will be discussed in future sessions.

Bill 3364 related to destination management and modified some powers and duties of the HTA, along with increases in restrictions and limitations as compared with the original vision in which powers were to be transferred and the HTA given a mission to manage and govern tourism for the State.

Bill 2659 related to regenerative tourism and gave requirements for the State Planning Act about the functional plan. However, it did not establish any specific funding for regenerative tourism, and it could be construed as an unfunded mandate, which the Board had discussed.

The PIG completed its work and discussed, as a recommendation to the Board, the re-establishment of a legislative PIG in the context of an ongoing discussion in the Board relating

to committees and PIGs.

Regarding the calendar, this PIG was empaneled in September 2023, and its report will be considered at the September Board meeting. Mr. McCully pointed out that it was not too late to reconvene another PIG.

The PIG concluded that a legislative PIG should be a constant group that is concerned with legislative matters because the HTA was a creature of the Legislature. While the HTA operated as an attached agency to DBEDT and the Governor, their statute, 201B, was completely the decision of the Legislature, which was the origin of the authority's existence.

Mr. McCully believed it was important that this recommendation be made and noted that almost half the Minutes of the previous meeting concerned housekeeping issues about committees, PIGs, and elections, as opposed to governing tourism in the State, which was the *kuleana* of the HTA. Instead, the Board had become enmeshed in details that were of little interest to the general public but were vital to the effective operations of the HTA, so it had to be done. Mr. McCully did not believe that the HTA had the luxury of refusing to engage in these activities, but he noted, for the record, that none of that was on the agenda for the present Board meeting. Mr. McCully pointed out that it was important for the HTA to conduct its *kuleana* by keeping its committees and PIGs up and running. The consensus of the PIG was not to direct the Board to do anything unless the Board would conclude how committees and groups were to be managed.

Chair thanked Mr. McCully for the work of the legislative PIG.

## **11. Report and Update by the BRANDING STANDING COMMITTEE of their Meeting Held on August 19, 2024 and August 27, 2024**

### **a. Discussion and Action on Sports Opportunities for FY 2025**

Chair Hannemann asked Mr. Miyasato to present this agenda item.

Mr. Miyasato thanked the Chair and explained that he would lead more discussions than presentations.

Mr. Nāho'opi'i referred to the item in the information binder with details about sports discussed during the Branding Standing Committee meeting. In general, the Branding Standing Committee was requesting approval of FY25 sports activities to date, both those that were identified by specific budget line items in the budget granted by the legislature, as well as activities that were to be funded from the sports opportunity fund, which concerned a broader range of activities.

Mr. Nāho'opi'i informed Board members that the items concerned were listed in the last table on page 2. All of these items have been approved by the Branding Standing Committee, as follows:

- The L.A. Clippers match was to take place later in October and was to be funded from the sports opportunity fund, line item 346, at \$750,000.
- The PGA Tour came under budget line item 312 and was to cost \$2.038 million.
- The LPGA Lotte Championship was scheduled for November at \$250,000.
- World Surf League was to be funded from the sports opportunity fund and would cost \$300,000.
- The UH Big West Tournament Partnership had its own budget line item 346, which was to cost \$167,000.
- The HTA sports consultant would be funded from the sports opportunity fund and cost \$100,000.

The Branding committee had recommended hiring a sports consultant because the HTA constantly received proposals involving sports. The intention was to be more active and to regard this as a sales opportunity to form contracts with sports and entertainment, in line with regenerative tourism to benefit the community. The consultant would be expected to identify appropriate venues and then seek out requests for proposals (RFPs) instead of the present situation where the HTA waited for proposals to come. The authority did not possess all the required expertise in-house, so it was preferable to employ a person who understood the nuances of negotiations and community benefits.

Mr. Nāho'opi'i added that a brand manager position would still be necessary to organize the paperwork and manage the contracts once the initial negotiations were completed. The sports consultant would also work with the HTA to develop and complete the sports strategy. The last sports strategy had been developed in 2022. The HTA needed to take a closer and more global look at sports and entertainment to identify and target markets and organizations as much as were done for other sales and conventions. The sports consultant would also work with Meet Hawai'i because there would be many packaging and group sales opportunities. Such a campaign had not previously been conducted. Mr. Nāho'opi'i stated that on the assessment of marketing research, \$100,000 would be the maximum overall cost, including expenses such as travel to events and conferences.

Mr. Nāho'opi'i stated that the Board was asked to approve a total expenditure for sports of \$3.605,850 from FY25 funds for the budget line items summarized as follows:

Partnership	Amount	Budget Line Item
2024 HTA x L.A. Clippers	\$750,000	376
2024 PGA Tour Events	\$2,038,850	312
LPGA Lotte Championship	\$250,000	343
World Surf League	\$300,000	374
UH–Big West Tournament Partnership	\$167,000	378
HTA Sports Consultant	\$100,000	346
Total	\$3,605,850	

Chair Miyasato proposed a motion to ask the HTA Board to approve expenditures of \$3,605,850 from FY25 funds for the corresponding budget line items previously detailed. Vice-Chair Paishon seconded the motion.

Mr. Miyasato added that hiring a sports consultant would be a way to develop synergy between local, national, and international sports. Mr. Nāho‘opi‘i added that including youth sports was an example of focusing on destination stewardship.

Mr. Miyasato mentioned that, in his opinion, the partnership with the LA Clippers was a solid example of this. Although this was a national team, it visited Hawai‘i to give back to the community. He hoped this relationship could be replicated with other sports teams.

Mr. Nāho‘opi‘i added that minimum guidelines for evaluating proposals must now include a community contribution in terms of dollar amount and community impact.

Dir. Tokioka informed Board members that he had accompanied the Lieutenant Governor on a visit to Korea the previous week. During this visit, they met with Chairman Shin from Lotte, who informed them that the Lotte LPGA event on West O‘ahu would be extended for three more years.

Chair Hannemann responded that after the former sports consultant had left the HTA, his desk had held a stack of proposals from all over the world for sports events in Hawai‘i. It was an appropriate time for a consultant to help review these proposals. The HTA staff had many good ideas and experience in hosting events, but in-house expertise was necessary. The HTA had to be on the lookout for new sporting activities, such as Pickleball.

Mr. Gionson conducted the roll call vote, and the motion was carried unanimously.

**b. Presentation and/or Discussion Regarding Destination Management Application and Relation to Branding and Marketing**

Mr. Miyasato had requested that this agenda item consider the Gohawaii app, major discussions about the digital Ag form, and the “Quinlan initiative,” which concerned the app for destination management. Mr. Miyasato hoped that the Board would carefully consider the use

of resources now that the Gohawaii app was to be revamped. This would be an appropriate time to discuss amalgamating everything by joining this with the app, which has now been approved and budgeted.

Mr. Miyasato stated that he was not proposing a motion but was suggesting that the discussion should be sent back to the Branding Standing Committee to find a proprietor for the amalgamated app and a clear definition of what it was to achieve. The proprietor would then be given the autonomy to develop the app, and the Board would line up behind the initiative.

Mr. Arakawa commented that this was a great concept and a way to view situations as opportunities. He favored this approach whereby an existing contract or program was modified slightly to benefit from the change in opportunity. He looked forward to seeing the progress of this concept.

Referring to the Ag form, Dir. Tokioka pointed out that different sectors of government were involved. The Department of Agriculture needed the form, and the HTA needed the information. Groups had been meeting both separately and collectively. Dir. Tokioka did not know whether the HTA had been involved in any of the meetings. He attended the meetings that pertained to him. He would ensure that the Department of Agriculture and DBEDT would invite the HTA to meetings so that they could communicate. Dir. Tokioka added that he often spoke with Ms. Chun.

Mr. Nāho'opi'i responded that he also often spoke with Ms. Chun. During the previous week, an IBM AI conference involving Senator Wakai took place, and discussions were held about issues related to digitization.

Dir. Tokioka emphasized the importance of having everyone at the same table. The Lieutenant Governor had spearheaded some of this work, and several departments hoped to discontinue using paper forms.

Mr. Miyasato repeated his assertion that the new system had to have a proprietor.

Dir. Tokioka responded that it was unfortunate that different project pieces were moving in different directions.

## **12. Presentation and Discussion of Current Market Insights and Conditions in Hawai'i and Key Major Hawai'i Tourism Markets**

Chair Hannemann reconvened the meeting and called members to order. He invited the Director of Tourism Research, Ms. Jennifer Chun, to make a presentation.

Ms. Chun explained that the package contained so much information that she would present only highlights. She stated that, as Mr. Nāho'opi'i had said, the annual visitor research report for 2023 had just been published. She pointed out that some statistics might have changed because the previous reports were preliminary, and the present reports were final.

Ms. Chun presented graphics comparing visitor arrivals and expenditures for July 2024 with July 2023 and July 2019. She noted that there had been a small increase in expenditure compared with the previous July. Still, the decrease in the number of monthly arrivals for July 2024 reflected ongoing market softness. There had been an increase in expenditure for visitors from the U.S. West but not from other markets. Japan had continued to improve, but the figures were still much lower than pre-pandemic figures.

Ms. Chun reported that spending for both West and East U.S. markets had increased slightly, but Japanese visitors' spending was still flat compared to previous years. However, she noted that the average daily census for visitors from Japan was about 3000 more than the previous July.

Ms. Chun stated that the island trend is as much as usual, with O'ahu doing well, Kaua'i and Hawai'i Island doing better, but Maui, Molokai, and Lanai are still lagging behind.

The airport throughput statistics supplied by the Transportation Security Authority increased during July but decreased slightly. Ms. Chun stated that July was usually a peak for tourism, but the load factors for domestic and international travel were slightly lower than those for 2023. Regarding lodging, the occupancy level had been slightly higher than the previous year. Still, the average daily rate (ADR) was lower than the previous July, so the Revenue Per Available Room (RevPAR) was also lower.

There had been lower occupancy for the vacation rental market but a slightly higher rate than in 2023. Most visitors stayed at hotels rather than rentals.

Ms. Chun's report contained detailed information about the markets, but she repeated Mr. Nāho'opii's statement that the international market needed to recover.

Charts of the Japan outbound market from 2010 to 2032, as forecast by Oxford Economics, showed the impact of the pandemic and predicted the recovery of the Japan market in 2025. Japanese travelers preferred nearby destinations such as China, Korea, and Taiwan. The U.S. was down on the preference scale, but growth was good compared to the previous year. In 2014, Hawai'i represented 9.2% of the international destinations of Japanese travelers, but in 2023, it had dropped to 5.8%. In 2014, Hawai'i represented over a third of U.S. destinations for the Japan market at 34.9%, but in 2023, this share had reduced to 32.1%.

Corresponding data for the Canada market showed that recovery from the impact of the pandemic was expected during 2024. The top destination for the Canada market was the USA. During 2014, Hawai'i represented 1.6% of all international destinations, but in 2023, this had dropped to 1.5%. Hawai'i represented 1.7% of all U.S. destinations in 2014 and 1.8% of all U.S. destinations in 2023. Ms. Chun commented that these figures appeared small because although the USA was a top destination for Canadians, they visited Hawai'i less. There had been a slight improvement in 2023 for Hawai'i.

Oxford Economics expected that the Korean outbound market would recover in 2025. Korean travelers also preferred nearby destinations such as Japan and China. Hawai'i's market share of all international travel from Korea had been 1.1% in 2014 and 0.8% in 2023. However, Hawai'i's share of U.S. travel from Korea had been 9.0% in 2014 and 9.1% in 2023. The reduction in Hawai'i's share of international travel during 2023 resulted from the increase in Korean outbound travel while the U.S. market share remained steady.

For outbound travel from the Australia market, recovery was expected during 2024. Australian travelers also preferred to visit nearby destinations but would make longer journeys to visit the U.K. The U.S. was midway in the ranking of international travel for the Australia market. Hawai'i's market share of all international travel was 3.3% in 2014 and 1.8% in 2023. Hawai'i's market share of U.S. travel had been 10.7% in 2014 and had held steady at 10.5% in 2023.

Outbound travel from China was expected to recover in 2025. Chinese travelers preferred to visit nearby destinations such as Hong Kong, Macau, Thailand, Japan, and Korea. Ms. Chun explained that she had chosen 2014 as the comparison year because there had been no direct service then. Chinese travelers' travel to Hawai'i was now more difficult because they had to pass through the U.S. before visiting Hawai'i. The China team hoped that more direct flights would be scheduled. Hawai'i's share of China's international market was 0.3% in 2014 and 0.1% in 2023. Hawai'i's share of U.S. travel had been 4.0% in 2014 and 2.0% in 2023.

Ms. Chun explained that China had the largest international outbound, but Hawai'i represented a very small share of the market. Compared to China, Korea, Australia, and Japan had greater potential for visitors, although actual arrivals were very different.

The six-month outlook still lagged behind pre-pandemic levels, although the U.S. market lagged less than other markets. Japan was far behind, but Canada was ahead for November, while Korea was forecast to perform well in January compared with pre-pandemic levels.

Ms. Chun's report gave detailed six-month forecasts for Japan, Canada, Korea, Australia, China, and New Zealand.

Regarding the islands, O'ahu seemed to be doing well in all markets. Kaua'i and Hawai'i Island were also holding steady, while Maui remained at a reduced level.

Mr. Nāho'opi'i expressed the hope that Ms. Chun would report to the Board every month.

Mr. Miyasato referred to Ms. Chun's mentioning an additional 3000 daily visitors from Japan. He observed that the market had flipped from more inbound Japan to more outbound Hawai'i during the downturn.

Studying the daily census of the average number of people in the State at any given time, Ms. Chun noted that during July 2024, there had been a daily average of 13,000 visitors from Japan in the State, compared with 10,000 at the same time the previous year. However, although July was expected to be a good month for tourism, in 2019, the daily average for July was 25,740,



almost twice the present number. There had been anecdotal accounts of a larger number of Japanese visitors during July 2024, which seemed true.

Mr. Miyasato mentioned that the statistics appeared to demonstrate that the additional funding allocated to the Japan market had been justified.

Ms. Chun responded that there had been 16000 more arrivals from Japan during 2024 than the previous year.

Mr. Nāho'opi'i referred to insights from his recent visit to Korea that seasonality seemed to be about to change, with more bookings in January than previously. This was why the Lotte Championship was now scheduled for November, which the sponsors felt was a better time than February or March. The target market was the luxury outbound traveler, and the advantage of the November period was that this did not conflict with the summer peak season. Mr. Nāho'opi'i noted that there had been many Chinese visitors on his flight. The plane was full, and many one-stop visitors from China were using the service. The HTA staff had been working with the China marketing team to encourage one-stop travel, transiting through Haneda, Narita, or Seoul, with convenient flight times.

Chair Hannemann responded that the Korea market seemed to be holding steady. He knew that from a national perspective, there was an emphasis on Japanese travel, so arranging additional incentives for Japanese visitors should be possible. The very active Hawai'i campaign in Japan should have an impact. Six legislative leaders were to travel to Japan in September, which would allow them to hold discussions with Hawai'i travel partners there. There was a big push for Chinese travel to the U.S. at the national level, and the figures were encouraging. The Chair thanked Ms. Chun for her report.

Dir. Tokioka stated that Mr. Nāho'opi'i would agree that the Governor of Jeju Island in Korea considered Jeju the Hawai'i of Asia. Hawai'i was much appreciated in Jeju and there were "Aloha" signs in stores showing that residents felt connected to Hawai'i. The Jeju Governor had been very insightful about the visitor industry. The Governor had explained that young people in Korea and Jeju could not travel far because of the currency's weakness, but it was everyone's dream to visit Hawai'i. Dir. Tokioka had discussed marketing dollars, and the Governor explained that the association raised money. Regarding Chinese travel, Director Ed Sniffen worked hard to arrange a direct flight from Hainan (China) to Hawai'i. The Governor of Hainan had met with Dir. Sniffen three months earlier and was focusing on direct travel. However, this could only be arranged at the Federal level. Dir. Tokioka thanked Ms. Chun for her report.

Dir. Tokioka noted that on his own Korean Airlines flight, the front of the plane was full, but the back was only half full. This showed that wealthy visitors traveled, but those without money were not. He noted that Mr. Nāho'opi'i and his team had flown with Hawaiian Airlines.

Ms. Iona mentioned speaking with some entertainers on Kaua'i, and she reminded Board members that the HTA supported the Merrie Monarch. The Chair added that this would be a

good opportunity for the Branding committee. Both Jeju and Hainan loved Hawai'i. The Chair would appreciate a Korean drama series being filmed in Hawai'i.

Mr. Miyasato pointed out that he hoped the Branding Committee would take advantage of opportunities to leverage all resources and drive a budget based on connections. Chair Hanneman replied that Korea was a perfect place, and their liking for Hawai'i was shown by their renaming a location Aikiki after Waikiki.

Mr. Miyasato stated that certain brands created magic in deference to Ms. Agas. He had visited Hiroshima, and the result of the trip was that 50 people were to visit Hawai'i Island the following month. Replicating that friendship would create memorable moments. He noted that the Branding Standing Committee had an excellent opportunity to harness all ideas.

Chair Hannemann suggested going on to Agenda Items 13b and c. Mr. Arakawa agreed, stating that some aspects of Agenda Item 13a would be discussed in the Executive Session because they involved contracts and other sensitive issues.

**13. Report and Update by the BUDGET, FINANCE, AND CONVENTION CENTER STANDING COMMITTEE of their Meetings Held on August 6, 2024, August 20, 2024, and August 26, 2024**

**a. Discussion and Action on HTA's Fiscal Year 2026 and 2027 Legislative Budget Proposal, Process, Issues, and Request**

This item was deferred after items 13a and 13b, and will be discussed in the Executive Session.

**b. Discussion and Action on HTA's Financial Report for July 2024**

Mr. Arakawa introduced this item and stated that the BFCC committee had not reviewed it, so this would be the first time it had been considered. He stated that Mr. Kishi, the Budget and Fiscal Officer for the HTA, would present the Financial Report.

Mr. Kishi pointed out that July was usually a slow month because of the close of the previous fiscal year. He usually advised vendors that payments were likely to be postponed at this time so that the books could be closed. This advice would enable vendors to plan accordingly.

He stated that the budget for FY24 had been \$60 million, and the HTA was on track to spend \$59.4 million as of July 31. \$6.9 million was still encumbered, comprising \$1 million in branding and \$5.2 million in destination management. \$639,000 was unspent and unencumbered, comprising about \$227,000 in branding and \$365,000 in salaries. During July, a major MMA contractor had been paid \$1.8 million.

Mr. Kishi stated that the balance sheet showed \$64 million remaining from the tourism general fund, including FY25 funds that had not yet been allotted as of July. The tourism special fund contained \$8.4 million, but those funds were restricted. The balance sheet also showed \$2 million in the HCC general fund and another \$47.7 million in the HCC enterprise special fund.

The 2024 legislature had permitted to spend \$34 million for FY25 operations, repairs, and maintenance. \$14.6 million had been allocated for the HCC roof repair project, comprising about \$900,000 encumbered, and \$13.7 million for other roof-related repairs. In the EDA ARPA tourism grant, about \$9 million remained, split between the outdoor recreation program organized in partnership with the DLNR and other HTA programs connected with that. Lastly, \$772,000 remained in the tourism emergency general fund, most of which has been spent on Maui recovery efforts.

Mr. Kishi invited questions.

Mr. McCully asked when the emergency fund was to be topped up again. Mr. Kishi explained that he had been investigating this issue but had not received a definite answer, having asked DBEDT, B&F, and even DAGS. One suggestion had been to request the Legislature. Mr. Isaac Choy, the Vice President of Finance, advised discussing this situation with the staff of DOTAX (Dept. of Taxation) or B&F. VP Choy believed it should be possible to replenish the fund when requested. It was important to solve this problem because the statute required the emergency fund to be maintained at \$5 million. Mr. McCully felt that it should not be necessary to request the Legislature. However, just in case, he would include it in the legislative request, but at the same time, he would speak with staff at DOTAX so that the fund could be replenished immediately. He asked whether Attorney Cole had recalled any discussion on this subject from the previous year.

AG Cole responded that the emergency fund was mentioned in the statute defining the distribution of transient accommodations tax (TAT). The statute stated that the emergency fund should be maintained at \$5 million, but the timing was unclear. AG Cole promised to work this out with B&F.

Mr. McCully stated that he recalled the Maui situation and the expectation of immediate replenishment of the emergency fund. However, some said that it would be an annual top-up. Ms. Paishon replied that there had been discussion about this issue.

Mr. McCully pointed out that the HTA would be remiss and unprepared for possible emergencies if the emergency funds were not replenished.

Mr. Nāho'opī'i responded that he had asked Mr. Kishi to follow up, but because this was the first time the emergency fund had been deployed, the State seemed unsure how to replenish it. The HTA staff had been working diligently over the past couple of months because of emergencies that had recently occurred, and it was important to be sure that the money would be immediately available for the next emergency.

Mr. McCully commented that he would be concerned about suggesting that replenishing the emergency fund would require legislative action or appropriation when the statutory language did not prescribe this. This prerogative should not be conceded to the legislature.

Mr. Nāho'opi'i suggested that the question could be posed to Director Salaveria during his visit to the Board.

Mr. Arakawa stated that a process had been set up whereby the Board would vote to declare an emergency, their recommendation would be submitted to the Governor, and the Governor would sign a declaration of an emergency, thus opening up the fund for use by the HTA. It seemed reasonable to Mr. Arakawa that the process would work as Mr. McCully had outlined. He noted that now would be a good time to clarify this in light of the hurricanes approaching Hawai'i.

Dir. Tokioka explained that he had recently discussed with his peers at the various State departments and agencies. However, VP Choy strongly believed that the emergency fund could be replenished whenever the request was made, and this would be a top priority.

Mr. Arakawa proposed a motion to approve the HTA's Financial Report for Fiscal 2024. Mr. McCully seconded the motion. There were no questions either from Board members or online.

Mr. Gionson conducted the roll call vote, and the motion was carried unanimously.

**c. Discussion and Action on the Hawai'i Convention Center's July 2024 Financial Report and Update on the Hawai'i Convention Center's 6-Year Repair and Maintenance Plan**

Mr. Arakawa proposed a motion to approve the HCC July 2024 Financial Report and Update on the HCC 6-year Repair and Maintenance Plan. Vice-Chair Paishon seconded the motion.

This item had been discussed at the previous BFCC meeting.

Mr. Arakawa asked the General Manager of the HCC, Ms. Terri Orton, to present the report.

Ms. Orton noted that July had been the first month of the new fiscal year. HCC had hosted 18 events in July, one more than budgeted. These events included one Citywide event, the International Indoor Air Convention, and seventeen local events; some were new and repeat events. Four events outperformed the budgeted food and beverage expectations, giving total facility revenue for July \$1.7 million, exceeding the budget by about \$300,000. This resulted in a net loss of \$309,100, \$223,000 less than the budgeted amount.

Ms. Orton believed that HCC had off to a good start, and the reforecast for this year showed a strong top line and bottom line. About 18 Citywide events were scheduled for the current fiscal year, slightly less than the previous year, but a strong finish for FY25 was expected.

The report for the first month showed that for every dollar spent, the center had returned \$2.36 to the State. Ms. Orton noted that for FY24, the return on investment (ROI) had been \$14.64 with 21 Citywide's, while for FY23, the ROI had been \$4.19 with seven Citywide's. This showed the importance of Citywide events to overall economic impact and tax generation. With 18 Citywide events scheduled in FY25, about \$355 million in economic impact and \$41 million in tax generation was expected. Ms. Orton believed there was a strong year ahead.

Ms. Orton highlighted some recent local events, including the return of Nā Hōkū Hanohano Awards in August. The International Pokémon Convention had brought in nearly 70,000 people, and Ms. Orton noted that the event was very well organized. The HCC staff had learned a lot from the organizers, particularly about organizing crowd control. This had been a very successful and lucrative event.

The Made in Hawai'i Festival attracted about 70,000 visitors, and many vendors said this was their event of the year. Some vendors sold out on day one, caught unprepared by the unexpectedly high sales volume. This was an example of local residents supporting local residents.

At least 50,000 participants were expected at the forthcoming Okinawan Festival. Ms. Orton informed Board members that, for the first time, HCC had created an Awamori Garden. The engineering department had been very busy making the 50- by 70-foot booth resemble a garden with hedges. The Okinawan Festival had partnered with some Honolulu breweries, and the Awamori Garden would be marketing craft beers, including Li Hing Saltzer, as well as serving specialty cocktails,

Ms. Orton informed Board members that Comic Con was a repeat event, and this was the smaller of the two Comic Cons that this organizer planned with HCC and Kawaii Kon being the larger. The meeting of the American Fishery Society was a Citywide event scheduled for mid-September. Ms. Orton's report highlighted events scheduled for the following three months and reproduced a press release highlighting HCC's banner year.

Ms. Orton assured Board members that the HCC staff would work hard to replicate the good results of the previous year and that they would be confident that they could finish with another strong year.

The report listed events that had participated in the center's carbon offset program in which a total of 371 legacy trees had been planted to date, equivalent to the absorption of 359.31 metric tonnes of CO<sub>2</sub>.

Ms. Orton pointed out that Board members must have seen the new paint in which color accents had been added to the exterior of the building. All the lights in the center were being changed to LED lights, which would reduce utility costs. The flooring of the main kitchen was to be replaced, and this was done one section at a time while waiting for a period when the center would be less busy. A major project was the repair of the waterproofing of the planters on the third floor and along the grand staircase, a process involving the excavation of all these planters.

The report contained a list of current repair and maintenance projects, broken down into those providing better guest experience and those providing greater department efficiency.

Regarding upcoming projects, the modernization of the escalator would probably be scheduled

for 2026, when the center would be partially closed for construction. The Board information packet listed the six-year capital improvement projects.

Ms. Orton highlighted some forthcoming homegrown events, beginning with the center's first pickleball tournament, scheduled for November 1 – 3. The pickleball courts were to be blessed on Wednesday, October 30, and all Board members would be invited. Invitations were to be sent out, and the Chair hoped to invite some legislators. The second pickleball tournament was scheduled for April, and three inquiries had been received about future pickleball events. Ms. Donna Ching, the President of the O'ahu Pickleball Association, had been featured on the front page of Midweek and had mentioned the forthcoming tournament. The center was to partner with Ms. Ching and the O'ahu Pickleball Association to manage open play events, for which courts would be laid down in the exhibition hall.

Another homegrown event, "Twas the Light before Christmas," was scheduled from Black Friday to January 1, 2025, and would be the HCC's and the HTA's first immersive experience. All the equipment for immersive shows had been purchased, and the intention was to mount at least two per year. Ms. Orton believed that this event would be spectacular. Creative planning was still in progress, in partnership with Paquin Entertainment, the company that did "Beyond Monet" and "Beyond Van Gogh" a few years ago. This was a true partnership in which ticket sales would be shared.

Chair Hannemann thanked Ms. Orton for her wonderful report. Recalling the Intuit Arena, he asked about the maximum capacity for a first-class concert in the HCC.

Ms. Orton replied that concerts could be held in the HCC and that staff from the corporate office's live entertainment division had looked into the possibility. Not many concerts were held in convention centers because they were not designed for that and usually had poor acoustics. EDM concerts were popular in convention centers. Ms. Orton stated that up to 15,000 seated guests had been fitted into the facility, and there could also be a standing room. For the American Dental Association, they had seated 14,000 participants with screens throughout. She pointed out that the sound quality was not ideal but could be improved by laying carpet, although this was very expensive.

Chair Hanneman asked whether movies had previously been shown on the rooftop. Ms. Orton replied that because of inclement weather, the movie shows had been moved into the ballroom, and the air-conditioning made clients prefer the ballroom.

Mr. Arakawa invited questions and comments and, on receiving none, asked Mr. Gionson to conduct the roll call vote.

Mr. Gionson conducted the roll call vote on the motion, which was carried unanimously.

Chair Hannemann declared a recess.

[Executive Session]

#### **14. Adjournment**

After returning from the Executive Session, Mr. Ka'anā'anā wished Ms. Kaho'ohanohano, the Senior Brand Manager, a happy birthday. He congratulated Ms. Agas' managed hotel, Disney Aulani Resort and Spa, for a happy 13<sup>th</sup> anniversary.

Mr. Arakawa, the Budget, Finance, and Convention Center (BFCC) Standing Committee chair, would like to defer agenda item 13A to the next meeting. It is to allow the staff and all the committee members more time to review the budgets, and it is with the understanding of the budget deadline of mid-September. Committee members should be aware of the upcoming meetings before September 15. Chair Hannemann agreed with the agenda deferral.

The meeting adjourned at 2:30 p.m.

Respectfully submitted,



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Sheillane Reyes  
Recorder



Ke'ena Kuleana Ho'opipa O Hawai'i  
1801 Kalākaua Avenue  
Honolulu, Hawai'i 96815  
**kelepona** tel 808 973 2255  
**kelepa'i** fax 808 973 2253  
hawaiiauthority.org

**SPECIAL BOARD MEETING  
HAWAII TOURISM AUTHORITY  
Friday, September 13, 2024, 8:30 a.m.**

**Hybrid In-Person & Virtual Meeting**

**Hawai'i Convention center**  
Parking Level | Executive Boardroom A  
1801 Kalākaua Avenue  
Honolulu, Hawai'i 96815

**MINUTES OF THE SPECIAL BOARD MEETING**

**MEMBERS PRESENT:**

Mufi Hannemann (Chair), Mahina Paishon (Vice Chair), Kimberly Agas (Zoom), David Arakawa, Stephanie Iona, James McCully (Zoom), Blaine Miyasato, Roy Pfund, James Tokioka (Ex Officio, DBEDT Director), Mike White

**MEMBERS NON-PRESENT:**

Chris West

**HTA STAFF PRESENT:**

Daniel Nāho'opi'i, Kalani Ka'anā'anā, Isaac Choy, Caroline Anderson, Iwalani Kūali'i Kaho'ohanohano, Talon Kishi, Carole Hagihara, Lindsay Sanborn

**GUESTS:**

Tyler Gomes, Laci Goshi, Krislyn Hashimoto, Kūhiō Lewis, Kumu Mina, Teri Orton, Alison Schaeffers, Mari Tait, Angela Vento (Zoom), Mr. Keith Vieira, Josh Hargrove (Zoom)

**LEGAL COUNSEL:**

John Cole

**1. Call to Order**



Chair Hannemann called the meeting to order at 8:37 a.m.

**2. Roll Call to Announce Name of Participating Board Members and to Identify Who Else is Present with Board Member if Location is Nonpublic**

Ms. Sanborn conducted the roll call, and all Board members except for Chris West were in attendance. Members who attended via Zoom were by themselves.

**3. Opening Protocol**

Mr. Ka'anā'anā conducted the opening cultural protocol with a chant.

**4. Report of Permitted Interactions at Informational Meetings or Presentations Not Organized by the Board Under HRS section 92-2.5(e)**

There was no input on Permitted Interaction

Chair Hannemann had invited some guests to share their *mana'o* about the budget process with both Board members and members of the public viewing this Board meeting. He stated that the first guest would be Mr. Keith Vieira.

Mr. Vieira introduced himself as the Principal of KV and Associates Hospitality Consulting. He stated that his work consisted of reconstructing the visitor experience in Hawai'i, collaborating primarily with larger landowners, schools, and private equity companies. During his 40 years in the visitor industry, living and working in Waikīkī, he experienced numerous challenges and noticed that people and communities immediately came together during difficult times. For instance, within four days after the 9/11 attacks, three gas station owners in the State capital noticed that visitor numbers had decreased by 30%. They had not previously realized that visitors refueled at their stations. Although a 30% decrease might seem minor, with their profits based on the top 15-20% of sales, they experienced a significant income drop.

Mr. Vieira stated that spending appeared to have decreased by 10% and 15%, representing a loss from which small businesses would find it difficult to recover. He noted that Waikīkī was attracting more visitors from the West Coast and fewer higher-spending travelers from Asia, which harmed small businesses.

Mr. Vieira pointed out that for many years, spending on marketing had been approximately \$100 million, including that for the HCC. In 2009, revenue from Transient Accommodations Tax (TAT) had been about \$110 million, increasing to a billion dollars by 2019. He believed that it was logical to allocate between 10% and 15% of resources for marketing.

Marketing received \$100 million in 2019, and the current target was \$80 million. After deducting the amount allocated to destination management, approximately \$50 million remained. However, marketing costs had increased by about 63% compared to 2019. This indicated that the amount available at present to drive visitor spending was only 20% of the amount previously allocated.

Mr. Vieira added that during the following week, he was to travel to Los Angeles for an activation campaign. This increase in marketing efforts was intended to ensure that Hawai'i would be visible in the marketplace. Many Hawai'i residents were unaware of the amount of money required for such campaigns. However, he added that if \$10 million had been allocated for publicity in the Bay Area, for instance, industry partners would typically add about nine times that amount by promoting a Hawai'i special or contacting higher-spending travelers. Hotels in the Bay Area might also offer Hawai'i specials, turning the \$10 million into \$90 million.

Mr. Vieira believed that an investment of \$10 million in marketing would drive approximately \$80 million in visitor spending. If this amount had been entirely on the hotel side, it would have generated \$16 million in TAT to replace the initial \$10 million investment. This type of spending generated more tax dollars, and all the TAT was paid into the general fund to benefit the entire community.

One of Mr. Vieira's significant disappointments had been the lack of benchmarks relating spending to tax dollars. For instance, the benchmark could have been 15% of the TAT, with the requirement for an annual increase of this figure. This was measurable, and if not achieved, either the responsible individuals should be dismissed or the benchmark should be reduced.

Mr. Vieira stated that goals had to be attained in the private sector, focusing on visitor spending rather than on visitor arrivals. Increased spending did sometimes result from more arrivals, but the aim should be to attract wealthier travelers who would spend more money upon arrival.

He clarified that he aimed not to exclude low-budget travelers since first-time low-budget travelers often became repeat visitors, maintaining a balance in the market. However, in today's world, even the smallest competitor in Mauritius could share online stories about their visitors, which was a factor to consider.

Mr. Vieira urged Board members to vote for the additional \$10 million. He also called on the visitor industry to increase their contributions to tourism in Hawai'i. He had been gratified by the assistance offered by the Marriott group. Their experience had made it easier to focus on Maui, but the issue affected the entire state. Maui, the price leader for luxury travelers, could not benefit from taking a share from the Big Island. Instead, the goal was to expand the overall market.

Chair Hannemann asked Mr. Vieira to share with Board members his information about the number of room nights for which Maui businesses were to be compensated due to loss in TAT.

Mr. Vieira responded that Maui had been helped to endure their nightmare due to the residents, the Army Corps of Engineers, and the builders. Approximately 260,000 room nights were generated between January 24 and June 10, 2024, when most residents left the hotels. Small groups of the Army Corps of Engineers had remained in each hotel, probably about 200 per day, but they would all have left by the end of the year. Thus, in addition to Maui having to start from zero, they had to make up those 260,000 room nights just to get back to the previous level. The room rates were not high, although the hotels provided food, usually by running it out of their kitchens like takeout, which was less costly. Most hotels were cleaning every third day, helping the hotel stay alive but not assisting the employees who needed to work. Visitors needed to be brought back so that employees could work every day. In one way, Maui had been fortunate to receive these room nights, but in another way, the community deserved a break.

Mr. Vieira mentioned that although the beach protesters had been peaceful, they had made people reluctant to visit Maui. The Mayor of Maui was urged to announce the following week that it was not just “okay” to visit Maui but that visitors were welcome to come and celebrate without offending. It was important to respect the tragedies that Maui had undergone, but no visitor wanted to feel that they had to walk on eggshells.

Ms. Iona thanked Mr. Vieira and recalled being present about management and marketing techniques at his presentation. He had delivered the acute message that today’s failure to conduct marketing would affect the future.

Mr. Vieira stated that Hawai’i was about 93% a leisure destination, and booking pace was of vital importance. The booking pace in any hotel for the next three months would enable him to predict the occupancy of the following year. Increasing the booking pace was essential. The fact that traveling to Hawai’i was expensive meant that extra work had to be done to target the right pockets.

Industry partners, such as credit card companies or frequent flyer programs, knew the exact amounts customers spend on overseas travel, lodging, and food and beverages. Marketing partnerships were important for the HTA because while the State contributed a certain amount, the partners contributed a larger amount.

Mr. Vieira suggested that the HTA could approach Marriott and propose partnering with MasterCard and Visa to target the Bay Area in a similar program to the activation in Los Angeles the following week. He pointed to the necessity for a major marketing effort in the Pacific Northwest. San Francisco and Los Angeles were major markets.

Mr. Vieira advised that marketing campaigns should be rolled out across other major markets directly tied to airline airlift, such as Atlanta, Dallas, New York, etc. Unless these programs were continually pushed, the booking pace would not be achieved.

He explained that the summer and fall would also be lost if the booking pace did not pick up in the first quarter. The situation of some hotels in Maui whose guests were all Hawai'i residents was undesirable. A change of approach was needed. Visits to Maui or West Maui by \$200 travelers were not helpful because these people would not visit all the 200 destinations presently available. Maui had to attract the \$600 spender, and Wailea had to attract the \$800 spender to match the programs in place.

Mr. Vieira pointed out that TAT revenues had increased by 1000% between 2009 and 2019, not because of more visitors, although that was a major aspect, but because of increased spending by visitors.

Mr. Vieira stated that in 2009, there had been 68,000 hotel rooms, timeshares, apartment condominiums, and a rental pool. In 2019, the total number was still 68,000, but the number of visitors had increased from 6.3 million in 2009 to 10.4 million in 2019, with many staying in short-term rentals (STRs). He acknowledged that while there were some positive aspects to this, there were also significant negative aspects.

For instance, a resident might have built a house in their backyard for their daughter and her children. Renting the house to visitors could provide an excellent experience of living with a local family for the visitors. However, it would be inappropriate for a group of five businesspeople to buy 50 condominiums in a new building in Koneyoi and list them on Airbnb. The condominiums were not intended for short-term rentals, and these should be in resort areas or similar locations. Mr. Vieira reminded Board members that the current situation could not continue due to the massive numbers involved, but he believed that a solution would eventually be reached.

Mr. Vieira recounted the experience of an acquaintance who had formerly rented out her property to a Canadian couple for \$1,200 a month. In the present market, she could rent it for \$750 a night, potentially earning \$21,000 instead of \$1,200. Naturally, she would prefer the higher amount she could use to support her grandchildren's college education. Mr. Vieira pointed out that this emphasized the need to regulate and manage the STR market. He also believed that the owners of many illegal STR were not paying TAT, or alternatively, their customers were paying it, but the owners were not remitting it.

Mr. McCully stated that he had read many of Mr. Vieira's writings over the years and observed that Mr. Vieira seemed to be addressing two subject areas: the HTA brand and management of the tourism industry and the political process. He inquired if Mr. Vieira could provide data to support the HTA's efforts to secure a \$150 million budget to support the Hawai'i tourism industry. Such data would enable multiple points of support for the return on investment (ROI) to be presented to the legislature, which required tangible evidence of the need for industry and community funding.

Mr. Vieira advised against approaching the legislature without data. He mentioned that Ms. Chun had information on past expenditures. He explained that if the impact of expenditure could be quantified, particularly through social media or online marketing, specific ROIs could be obtained, whether in terms of touches, views, or actual bookings. Hotels have already conducted such processes to determine where and when money is most effectively spent. A hotel could see that certain expenditures with a particular wholesaler would drive a specific percentage of revenue. It was important for the HTA to set goals to demonstrate the effectiveness of their spending. Data was available, and if goals were not being achieved, then the leaders should not be in their positions.

Mr. McCully responded that he firmly believed that multiple sources of information would be necessary, not just the internal information generated by government departments. While this information was credible, data supported by the industry had a significant impact. Everyone at the HTA shared the goal of securing funding to return to the levels of support of 2009 or earlier. However, Mr. McCully believed that Mr. Vieira knew the political reality that the HTA was separated from TAT revenues. The HTA was dependent upon the release of government funds based on a funding amount agreed by the legislature. The HTA was no longer a governing board but a policy board that made recommendations. Mr. McCully appreciated Mr. Vieira's attendance and emphasized the importance of his support.

Mr. Pfund, following up on the need for credible financial information, mentioned that he was a member of the Hawai'i Business Round Table Tourism Committee. He had been advocating for the HTA to do exactly what Mr. Vieira suggested: to produce more precise numbers. Understanding how gross expenditure was distilled into tax revenue for the State was essential. The Chair of the Hawai'i Business Round Table, Mr. Bob Harrison, had stated the previous day that the association intended to develop an economic study model that would determine the total amount of visitor spending and how it filtered down into the economy through multiple layers. Visitors bought goods and services, and businesses bought goods and services, all contributing to income tax.

Additionally, fee income generated by the visitor industry and paid to the Department of Transportation, such as airline landing, concession, and harbor fees, needed to be incorporated. This approach would encompass multiple areas where tourism generated income. This included the provision of jobs, which was the focus of destination management. The Round Table survey would support any legislative or administrative request.

Mr. Vieira mentioned that Hawai'i had relied on wholesalers for marketing for years, and they had done an excellent job. However, he believed that future segmentation would involve consortia, direct marketing, and online travel agents. The HTA needed to adapt to these methods, whose unique aspect was the ability to measure response. The challenge was that this was expensive. Nevertheless, Mr. Vieira believed that social media were ideally suited to convey Hawai'i's beauty, experiences, and uniqueness. At present, the worst aspects of social

media have been allowed to dominate, focusing on foolish actions or inappropriate comments or people who swam at Lahaina. There had been a failure to use influencers to leverage the positive and to take advantage of visitors' incredible memories of Hawai'i.

Mr. Vieira recalled that during the floods in previous years, visitors had been taken in by local families. He remarked that circumstances had changed, and people needed to act more sensibly, acknowledging that while it was possible to manage the situation, it would incur costs.

Dir. Tokioka mentioned that Mr. Vieira had raised the issue of hotel rates on Maui. Dir. Tokioka and the Lieutenant Governor had recently visited Korea and Japan to generate increased business from those countries. Representatives from both countries had expressed their desire to support Maui and restart their businesses in Hawai'i. JTB, JCB, and JAL were to collaborate to bring visitors back. However, the primary concern was the high rates, which the free independent travelers (FITs) and the leisure market could not afford. The representatives had requested that this concern be communicated to the Hawai'i visitor industry. Dir. Tokioka intended to address this at the forthcoming Hotel Round Table and inquired whether there were opportunities for promotions specifically targeted at Asian travelers, who were high spenders when they arrived in Hawai'i.

Mr. Vieira agreed that this was an excellent point and highlighted the dollar's strength against the yen. He had recently reviewed hotel rates in Japan, noting that there was nothing available for under \$500, even considering the yen decline of the yen. Hawai'i would never be a low-cost destination, and it was important to demonstrate to the Japanese market that it offered added value. Some destinations' advantages were the availability of local experiences, such as street vendors. Mr. Vieira acknowledged that rates had increased significantly and urged that the message should be that, while Hawai'i would never be cheap, it could offer much better value.

Dir. Tokioka agreed with this statement and mentioned that he had used artificial intelligence (AI) to analyze room rates on Maui, pre-COVID, post-COVID, and present. He intended to share these findings at the Hotel Round Table. However, he noted that occupancy percentages had increased significantly after COVID. He thanked Mr. Vieira for his *mana'o* on the visitor industry.

Chair Hannemann noted that Mr. Vieira had strongly supported the HTA saturation campaign in Southern California, followed by a Japan campaign to encourage visitors to return. The Chair also mentioned that even if funding had not reached the desired level, these campaigns would encourage the type of major cooperative partnerships that had taken place in the past. He asked whether there were other areas where saturation should be implemented.

Mr. Vieira responded that no West Coast resident was unaware of Hawai'i, but merely running an advertisement in the Sunday paper or on social media did not necessarily motivate travelers. What was effective was an industry-wide, state-wide cooperative effort. Mr. Vieira gave the example that the HTA could partner with Macy's for a fashion show featuring Hawaiian music and talented Hawaiian designers while simultaneously promoting Hawai'i or Maui during a

Rams football game. The HTA could also advertise in the *LA Times* or sponsor an editorial about the great hiking trails in Hawai'i, with the industry contributing four pages to give six pages about Hawai'i. Additionally, a Hawai'i campaign by the Southern California branch of AAA, with 59 million members, could promote a special Hawai'i month, while hotel chains could run promotions with their frequent travelers. This comprehensive approach would be effective and would be similar to the marketing methods used by the Caribbean and Mexico.

Mr. Vieira emphasized that there was a special reaction when people traveled and mentioned they were from Hawai'i, which was different from when travelers mentioned that they were from Mexico. The aim was to trigger that special emotion.

Mr. Vieira stated that spending was more important than the number of visitors. He emphasized that Hawai'i's problem could not be solved by increasing the number of visitors to 20 million. On the other hand, eliminating STRs might help achieve a balanced spending level. STR visitors typically bought steaks at Costco and sandwiches at the beach, which did not align with the targeted visitor profile. He argued that increasing visitor numbers was not feasible; instead, visitor spending should be increased. Hotels might raise their rates and create clubs, usually employing around 30 people in the bar and other areas. This would elevate average daily expenditure and increase working hours, thus benefiting Hawai'i.

Chair Hannemann commented that Mr. Vieira appeared to be advocating for an \$80 million budget, while Mr. Vieira clarified that he was urging for a \$150 million budget. The Chair explained that the Board was faced with two proposals: one for an \$80 million base budget and the other for a \$70 million base budget with additional supplements. The Chair asked whether private industry would support an \$80 million base budget rather than a \$70 million base budget.

Mr. Vieira responded that he wholeheartedly favored the larger figure and stated that he would make private industry accountable by "holding their feet to the fire." However, he questioned how much the HTA was doing to justify the additional \$10 million. Mr. Vieira suggested that another \$15 million should be contributed by private industry spending if the State were to spend an additional \$10 million. He reminded the Board that they were comparing current amounts with those spent on marketing in the early 2000s when there were 4 million visitors. He was concerned about finding ways to get people back to work. During the previous year, hotels had informed him that the average union salary was \$96,000 without tips. Mr. Vieira emphasized that those employees deserved every penny and needed to be put back to work. He recalled that his family had come off the plantation, and everything his parents did had been aimed at sending their children to college.

Mr. Vieira recalled that two weeks after the Maui fire, he had attended a West Maui employee meeting attended by 425 out of the total 550 employees. Ninety percent of them were Filipinos, with an average age of 68. The employees had expressed their desire to return to

work as their families needed the money. He was shocked when he saw how hard hotel employees worked. He recalled that maids had received very small tips in the past, but he was glad to say that the amount had now increased to \$9,000. Mr. Vieira continued to stress the importance of putting people back to work.

Mr. Miyasato underscored the discussion about funding, highlighting Mr. Vieira's unparalleled experience. He noted that some branding and marketing initiatives were intangible and involved feelings. He regarded Mr. Vieira as the State subject matter expert and advised Board members to take his comments seriously. He asked Mr. Vieira if it was true to say, "It takes money to make money."

Mr. Vieira responded that in today's market, it took *targeted* money. It was important to target cities from which people traveled to Hawai'i, focusing on the shortest air journeys and the high-spending visitors. There were various methods of targeted marketing to identify these visitors. Mr. Vieira agreed that the visitor industry understood the issues the legislature and administration faced. He recalled a period when the HTA Board consisted solely of industry people, with no outsiders. During the 1990s, destination management had not been an issue. He emphasized the need to create demand, especially since the pandemic and the Maui fires. Issues created by the fires had been different, as visitors stayed away to avoid upsetting residents. Consequently, their next trip might be to Tahiti.

Mr. Vieira noted that the shortfall was not unique to Hawai'i. Other destinations also saw 10% reductions. Advance bookings did not look promising, and destinations were not adding new products. He suggested that if the HTA received more money, the visitor industry would contribute more and allocate it where needed.

Mr. Miyasato remarked that marketing was a *kāko'o* thing, and he believed that marketing and branding were more art than science. He emphasized the importance of emotion in the marketing strategy connecting people to the destination. He stated that if a location were targeted, everyone should be involved, and an analysis should finally be conducted to determine the strategy's effectiveness.

Mr. Vieira replied that the hotel industry conducted monthly operating reviews to assess the results of marketing spending. He repeated that booking pace was a key indicator. For instance, on the Monday following the Sunday of the Hawaiian Open, usually around January 11 or 12, travel operators expected a 700% increase in bookings. If this did not occur, it indicated a problem. East Coast customers, having watched the blue skies of the golf tournament, were eager to experience good weather in Hawai'i.

Mr. Miyasato pointed out that the major budget components submitted by the Branding Standing Committee included targeted installations, cooperatives, and coalitions. He agreed that "desperate times called for desperate measures."



Mr. Vieira remarked that the HTA was fortunate to have the best brand in the world from a marketing standpoint.

Mr. Arakawa thanked Mr. Vieira for taking his calls and answering his questions. He admired Mr. Vieira's presentation and his knowledge of tourism and the Hawai'i market. He was interested in hearing Mr. Vieira say that the HTA could use \$150 million. Mr. Arakawa understood that Mr. Vieira was present to advocate for the \$80 million base budget and inquired if he was aware of a proposal for up to \$90 million, consisting of \$70 million plus two additional \$10 million increments. The overall cap was to be \$84.3 million; from his standpoint, more funding was preferable.

Mr. Vieira agreed that more funding was necessary. While not wishing to appear greedy, he emphasized that the HTA had many responsibilities, as did the legislature. He pointed out that tourism was one of the few investments made by the State where the return on investment could be clearly seen. If an investment did not yield returns, then either the people in charge needed to be replaced or the approach needed to be changed. He believed it was straightforward to review what worked and what did not. Mr. Vieira also encouraged the visitor industry to join in and increase the total investment to \$900 million.

The key point was that with sufficient funding, efforts could be targeted more effectively. He highlighted the success of cooperatives like Pleasant Hawai'i and Costco, which were significant players in the wholesale market and catered directly to consumers. This direct approach had changed the travel landscape, as travelers now preferred to book directly through Costco rather than through a retail travel agent.

Mr. Arakawa asked Mr. Vieira to share his opinion about the main priorities to be targeted in the budget.

Mr. Vieira identified consistency as the missing element. During the pandemic, investing money without possibly a return did not make sense. However, it had become clear over time that consistent efforts were crucial. For example, the HTA should target Los Angeles every September and explore beyond the usual venues, looking at the Dodgers, the California Angels, and South Coast Plaza, located in one of the wealthiest areas on the West Coast. There should be an annual program with these entities.

Mr. Vieira recalled that when he had participated in the HTA Hawai'i Revised Economic Council, the visitor industry had requested a three-year funding mechanism to enable long-term deals. This approach allowed for consistent marketing efforts. For instance, when Jack Richards planned a Pleasant Hawai'i schedule for September and discussed it with AAA, their plans could be aligned for simultaneous marketing. Mr. Vieira believed that consistency and repeated engagement with major metropolitan areas were essential for driving Hawai'i's business.

Mr. Arakawa expressed his gratitude and referred to the importance of consistency. He noted that Mr. Vieira worked with several major hotels and represented the owners. Mr. Arakawa

mentioned that the fall was the “shoulder season” for the West Coast. Hotel owners had complained about the poor summer performance. Mr. Arakawa asked staff to prepare a program to address this issue and created an incremental fund. The HTA’s presence at Rams events was due to hotel owners’ suggestions. They recognized the need to prepare for the shoulder season. Mr. Arakawa thanked Mr. Vieira for his suggestions and asked if he had other tips for the visitor industry apart from consistency and targeted markets.

Mr. Vieira responded that the Hawai’i brand was very strong. An example was the hula show organized by the Council for Native Hawaiian Advancement (CNHA). People had lasting memories from attending such events. Mr. Vieira also mentioned events on neighboring islands and vendors in Maui and Lahaina. More than 35,000 people attended the Made in Hawai’i Festival two weeks ago. Some vendors had told Mr. Vieira that they relied on such events for their livelihoods. He questioned why this could not be a year-round or six-month event. There was a demand for Made in Hawai’i products, which brought people together again. Mr. Vieira explained that this was exemplified by the involvement of local designers in the renovation of a hotel. He pointed out that the diversification of tourism created opportunities for residents to make money from the visitor industry, which would garner more support for the industry. Mr. Vieira recalled that during previous decreases in tourism, the CEO of the Bank of Hawai’i had led efforts to encourage visitors because he understood the business community’s needs.

Mr. Vieira’s previous discussions with the Japan Tourism Board and governors and mayors in Japan demonstrated the importance of the message that visitors wanted. He believed that everyone could share in the benefits of tourism by bringing more people to the table.

Mr. Arakawa summarized the discussion, highlighting the importance of consistent programs targeted at successful markets, building up the brand, and making the brand available. He asked whether Mr. Vieira knew that these priorities were included in the base budget. Mr. Vieira replied that he had not reviewed the budget proposals and was testifying at the Chair’s request.

Mr. Vieira suggested that the upcoming Maui Classic, the best pre-season basketball tournament in the US, should be extended beyond a three-day event. He suggested that it could be a two-week event since no one visited Maui for just three days. Mr. Vieira proposed a one-week Maui vendors’ campaign and suggested filming the artisans and their creations during the basketball tournament. It was important to provide startup or marketing money to support such initiatives. Mr. Vieira suggested that products sold at the Made in Hawai’i event should be available at every event, such as golf tournaments and basketball tournaments, to enhance the experience. He compared this to Tahiti, where the purchase of local products made visitors feel they were supporting residents.

Mr. Arakawa pointed out that events held at the Hawai'i Convention Center, such as a recent ethnic festival, usually incorporated sales of food and beverages. Mr. Arakawa asked whether the HTA had consulted Mr. Vieira and recommended that this be a good practice.

Mr. Vieira observed that there were opportunities for other community members to benefit financially from tourism, thereby challenging the notion that an influx of visitors was "a necessary evil." He believed that while most of the community supported tourism, this support should not be based on relatives working as maids and requiring income. Instead, he contended that tourism should be endorsed because it provides benefits to everyone in the community.

Mr. Arakawa commented that Mr. Vieira had not been consulted about the budget. He believed that the HTA needed to make more effort to hear new ideas.

Chair Hannemann responded that Mr. Vieira had received more than his fair share of telephone calls.

Mr. Arakawa did not want to cut off anyone else but was trying to ensure that Mr. Vieira's suggestions would form part of the budget so that next year, they would be better prepared. Mr. Vieira mentioned the importance of adding value, which could be discussed later. Mr. Vieira had also mentioned targeting programs and "holding the feet of private industry to the fire." Mr. Arakawa asked Mr. Vieira to explain what he had meant by this expression.

Mr. Vieira stated that any investment should yield a return, and the HVCB and other vendors should be aware of this. He had always considered it illogical to separate Japan from other Asian regions since managing one large entity was more efficient than managing four or five smaller ones. Additionally, the reallocation of funds was simpler within a single entity. If Japan were to face challenges due to the low value of the yen, it would become more difficult to reallocate funds from one country to another. During Mr. Vieira's tenure at the HTA, there had been five staff members, and at that time, it had been easier to hold the HVCB accountable, and not just for marketing. Everyone desired the HVCB's success, but Mr. Vieira was uncertain about their current accountability for the programs that they managed. Furthermore, accountability for smaller sums of money was more challenging.

Mr. Arakawa expressed his gratitude to Mr. Vieira. During the visit to the previous Board meeting by Dir. Salaveria of the Department of Budget and Finance (DBF) raised the ROI issue, and an emphasis was placed on justifying expenses.

Mr. Vieira remarked that determining the ROI was easier today than in the past.

Mr. Miyasato, in deference to Mr. Arakawa, clarified that Mr. Vieira was not testifying to Board members but rather educating them, and his presence was a tangible example of his educational role.

Chair Hannemann announced that Mr. Vieira was excused.

Chair Hannemann then invited Mr. Kūhiō Lewis, President and CEO of the Council for Native Hawaiian Advancement (CNHA), to share his *mana'o* in person. He remarked that Board members had just taken part in an extensive discussion on destination marketing. Mr. Lewis would provide updates on the need for destination stewardship and destination management. The CNHA convention was scheduled for the coming week, with most of his staff departing the following day. Traditionally, conventions had focused on issues related to Hawaiian culture, but in recent years, tourism has been incorporated into the agenda. The focus was to envisage all aspects of tourism from a community perspective.

Mr. Lewis mentioned that the forthcoming convention would feature an opening ceremony for which, for the first time in history, all of the six Hawai'i Island *moku* would come together. This would be the CNHA's inaugural convention on the island. Mr. Lewis highlighted this because these voices would be integral to the discussions on tourism. Historically, Hawaiians were only seen marching in protest, but this proactive approach reflected the capacity that the CNHA had brought to the HTA table. Mr. Lewis intended to continue to support and elevate this work. He expressed gratitude for the opportunity to participate in this Board meeting.

Mr. Lewis noted that it had been a year since the CNHA had been given the contract granting them destination stewardship responsibilities. This had been a compromise aimed at making progress and resolving issues. He knew numerous blessings and opportunities to strengthen the *kuleana* of the CNHA had emerged from this arrangement.

Mr. Lewis stated that, in many ways, the CNHA's potential and capacity had been underutilized by the HTA. Many of the most visible activities of the CNHA, such as the show at the Waikīkī Shell or working with the Honolulu City Council to revamp the beach, were not funded by the HTA but by the CNHA itself, which spent about \$300,000 a month to support such activities. Other resources could have been utilized but were not permitted by their contracts. The CNHA hoped for an opportunity to discuss and recalibrate how they could move ahead.

The CNHA, like the HTA, allocated 7% of its budget to support the community and some smaller programs. The CNHA's other *kuleana* was messaging. They had been allocated \$60,000 for marketing at airports, compared to when HVCB was controlling it. They did not have a way to convey a meaningful message.

Ms. Anderson pointed out that the feed from the HTA boardroom had frozen.

Mr. Lewis appealed to the HTA for support for destination stewardship and management.

Mr. Ka'anā'anā asked for a technical pause for a few minutes because some members on Zoom had no feed.

Chair Hannemann thanked Mr. Lewis for his presence at the Board meeting and asked him to elaborate on where more resources for destination stewardship should be added to the budget.

Mr. Lewis believed the Visitor Education Post-Arrival Marketing (VEPAM) budget needed to be increased significantly. Feedback from visitors and residents showed that the contract was insufficient to communicate effectively with visitors. The available finances limited the program to messaging in the airport baggage claim area. The budget was tight, and creativity was needed to stretch across a market as large as Hawai'i.

Mr. Lewis explained that, in the simplest form, the HVCB brought in visitors, and once they arrived, the CNHA assisted with hospitality and messaging. However, the CNHA lacked the funds to be effective, so they requested more VEPAM funds.

Chair Hannemann acknowledged the challenge before them and noted that the legislature had codified destination management as part of the HTA's responsibilities. This meant that the legislature would closely examine the HTA's activities, and destination marketing could not be the agency's sole focus. The next House speaker strongly advocated for destination stewardship and intended to speak on this topic at the forthcoming Hawai'i Tourism Conference.

Mr. Lewis emphasized that community projects needed technical assistance to support their brands. He regretted that this had been cut from the CNHA budget.

Vice-Chair Paishon thanked Mr. Lewis for his presentation and expressed her agreement with his statements. Technical capacity had to be improved to develop new experiences and products, particularly for startup businesses and businesses that were pivoting. Vice-Chair Paishon added that this aligned well with Mr. Vieira's comments.

She also noted that coordination with operators and business owners across the business environment was important. As a small business owner herself and a member of several chambers of commerce, she understood that small businesses required technical support to build their capacity. She regretted that the CNHA budget had been cut, but despite the cuts, the CNHA had generated a strong impact.

Vice-Chair Paishon referred to preceding discussions of ROI and noted the importance of increased investment in robust data systems. Assessing the return on investment was important, especially at the community and county levels. She asked Mr. Lewis to share the results that the present CNHA contract had brought to the visitor industry as a whole.

Mr. Lewis stated that the present contract had conferred many benefits on the islands. He noted that the grant program was not intended to be a perpetual initiative but was aimed at enabling businesses to become self-sufficient, even though this was not always possible. Technical resources were needed to assist grantees so that they did not keep returning for more funds but instead developed and diversified.

Mr. Lewis reminded Board members that the CNHA had developed the Curator quality assurance program, which successfully ensured that certified businesses had direction and brand control. DBEDT was to join that effort to help drive the HTA's direction going forward.

The CNHA contract also enabled engagement with communities across the islands. This positive outcome had been exemplified by communication with community members who formerly opposed the existence of the HTA.

Mr. Lewis also commented that the CNHA contract had permitted capacity building by contractors whose growth had previously been limited. The existing contract limited the CNHA's other activities.

Ms. Paishon asked how the CNHA would use an increase in their budget if an \$80 million budget were approved for the HTA.

Mr. Lewis responded that an increase in the CNHA budget would provide a greater ability to communicate with visitors after their arrival and an opportunity to recalibrate their contract. Some changes had elapsed since the contract was instituted. There were possibilities for a better synergy between the HVCB and the CNHA, and a more logical budget could be created.

Mr. Ka'anā'anā added that much had been learned during the previous year. He reflected on the stewardship framework that had been developed from the initial request for proposal (RFP). Mr. Ka'anā'anā called the Board's attention to two line items that were to be recommended for FY26:

- The community tourism collaboratives (CTCs) for which the HTA staff had originally requested \$2.5 million were to be reduced to \$1 million in the present budget request.
- The VEPAM for which \$2.2 million had originally been requested but was now reduced to \$1.2 million.

Mr. Ka'anā'anā understood that everyone had to make sacrifices. He referred to these line items to facilitate discussion later in the meeting.

Mr. Miyasato thanked Mr. Lewis for his thorough presentation and observed that enhancing the HTA brand within the community through the work of the CNHA was immeasurable and priceless. This discussion took place in relation to the value of the CNHA's original contract and its present value. Mr. Miyasato considered that budgeting was the end product of a plan, and it was driven by a strategy in which partners were consulted. He hoped that this open discussion of the FY26/FY27 budget would avoid previous errors. He thanked Mr. Lewis again for his timely presentation.

Mr. Arakawa thanked Mr. Lewis and appreciated his response to Mr. Arakawa's calls and questions. Mr. Arakawa was aware of several priorities, including airport advertising, destination stewardship and management in Waikīkī, and creating new venues to which visitors could be directed. He asked Mr. Lewis to explain what he meant by "new content."

Mr. Lewis explained that there was a need to create messaging to address two audiences. The right message had to be developed, which required capacity and the ability to contract the right

people. Good messaging was not free, and the CNHA's ability to create the right content in collaboration with the HTA required resources. Up to the present, the CNHA has not had the opportunity to recruit creative talent to build up the brand by developing appropriate messaging.

Mr. Arakawa asked Mr. Lewis to explain what was entailed in diversifying offerings and whether the CNHA was engaged in this activity at present or planned to do so in the future.

Mr. Lewis responded that he did not envisage that the CNHA would conduct these activities directly but would rather assist other entities in building their capacity to do so. An example of this would be seen at the CNHA convention, which was to be transformed into a mini-experience. Curated bus tours would enable participants to experience Hawai'i Island from an intimate and authentic perspective, enriched by the presence of guides. He believed that visitors were eager to experience fishponds and Mālama 'Āina projects. The challenge was how to develop such experiences and integrate them into the industry so that they became offerings. The practitioner and the farmer would form part of the ecosystem. Creation of such experiences within Waikīkī and other visitor industry areas would require resources and capacity building.

Mr. Arakawa referred to the CNHA's current contract and mentioned that some Board members had been drafting the HVCB and the CNHA contracts. He inquired whether broadening or revisiting those contracts would allow the CNHA to conduct their projects more effectively.

Mr. Lewis concurred and, referring to Mr. Ka'anā'anā's point, he noted that the CNHA had learned a great deal during the course of the present contract. The most important aspect was the possibility of participating in discussions about ineffective activities. He pointed out that any necessary adjustments could be made after such evaluations. He believed that revisiting and expanding the scope of the present contract would improve the CNHA's ability to fulfill its mission.

Mr. Arakawa understood that Mr. Lewis, like Mr. Vieira, was present at the Board meeting to recommend requesting a budget of \$80 million. Still, he asked whether Mr. Lewis knew a budget of up to \$90 million was possible.

Mr. Lewis responded that he had not been aware of this possibility and was not necessarily advocating for any specific amount but wished to inform the Board that more resources were needed.

Mr. Arakawa informed Mr. Lewis, Mr. Vieira, and the listening public that the budget committee believed that the HTA staff had recommended any cuts. The staff had been asked to recommend high-priority projects to be included in the base budget of \$70 million, mid-priority projects to be included in Supplemental 1 of \$10 million, and lower-priority projects in Supplemental 2 of \$10 million. The 70,10,10 proposal was a recommendation, and any cuts

made had been based on the advice of the HTA staff, not that of Board members. Mr. Arakawa emphasized the need for better communication and possible reevaluation of the scope of existing contracts.

Mr. Lewis responded that he realized that the CNHA would benefit from his more frequent attendance and information-sharing at the Board. The Board needed to know more about the activities of the CNHA, such as their present collaboration with the City and County of Honolulu to renovate Kuhio Beach. Mr. Lewis committed himself to updating the HTA Board more regularly.

Mr. Arakawa acknowledged that the HTA staff had worked hard with limited resources and time. The destination stewardship, marketing, planning, and administrative staff collaborated diligently on the budget. He stated that the budget committee would endeavor to discuss with Mr. Lewis, Mr. Vieira, and others in the industry to improve its focus on particular issues. If the current 70, 10, 10 proposals were submitted to the legislature, additional items could be requested. As the budget submission process continued, additional projects suggested by Mr. Vieira and Mr. Lewis could be added.

Ms. Iona reminded Board members that Mr. Lewis had “walked the walk” on several projects. She asked him to share with the Board the information that he had shared at the previous year’s convention about the success of popup Mākeke.

Mr. Lewis expressed his gratitude for the grant from the HTA, which had benefited the popup Mākeke project. Mr. Ka’anā’anā mentioned that \$100,000 had been received during the pandemic. 600,000 products have been distributed worldwide, and the CNHA continued to help businesses with products and branding. Products had been brought to Waikīkī, and the popup had expanded into a significant asset, which was still generating funds. The customer base was mainly outside Hawai’i, and the project had been of great assistance.

Mr. Miyasato commented that, from a budget perspective, he noted that Mr. Arakawa had mentioned a \$70 million base, \$10 million in Supplemental 1, and \$4.3 million in Supplemental 2. However, the Branding and Marketing and Ho’okahua Standing Committees, the subject matter committees, recommended an \$80 million base budget. He clarified that he did not suggest that every project was not important, but he wished to compare the 70, 10, 10 proposals with the \$80 million proposal.

Mr. Lewis responded that he tried to stay out of policy discussions. However, he realized that the HTA was now in a better condition than when he had first been involved in it.

Mr. Miyasato agreed that he did not want to drag Mr. Lewis into policy discussions, but he wanted Mr. Lewis to be aware of the facts.

Chair Hannemann stated that he constantly communicated with Mr. Lewis and Mr. Vieira to obtain their points of view. This was vital because the HTA was now mandated to conduct



destination management and marketing. He recalled that when Mayor Bissen requested recommendations from members of an advisory committee to help recover from the wildfires, Mr. Lewis was the first person that Chair Hannemann had suggested. The Chair and Vice-Chair Paishon knew Mr. Lewis's previous work in that area.

Mr. Lewis promised to speak with Archie Kalepa regarding social influencers to request his assistance. He also reminded Board members that the CNHA and Kilohana needed financial resources to fulfill their missions, which was related to the ROI. He thanked Board members and assured them that the CNHA maximized and leveraged all the funds they received from the HTA to make the most of the funding and secure additional resources.

Mr. Vieira applauded the HTA's efforts to unite people. The collaboration with the CNHA over the previous year highlighted the successes of the HTA and Mr. Lewis's team. He noted that the visitor industry often felt that a dollar for destination stewardship was a dollar away from marketing. However, it was important to communicate to the industry that destination stewardship was now part of the HTA charter. The HVCB had formerly funded many projects, but now everyone understood.

Chair Hannemann responded that dialogue was vital, and the HTA continued participating. He emphasized Mr. Vieira's point that both sides needed to understand how a partnership between the strengths of stewardship and marketing would benefit the whole of Hawai'i. He thanked both Mr. Vieira and Mr. Lewis for their contributions.

Dir. Tokioka reminded the Chair that he, Mr. Arakawa, and Ms. Agas, as well as some staff members, would have to leave the meeting at 10:30 a.m. to deliberate on an RFP with members from other state agencies.

Chair Hannemann asked the remaining guests to limit the duration of their remarks to three minutes.

Chair Hannemann introduced Ms. Angela Vento, the General Manager of Waimea Beach Resort, part of the Marriott family of hotels.

Ms. Vento stated that she knew some Board members very well, although she had not previously met others. She moved to Hawai'i 35 years ago and held various roles in sales and marketing, working with many hotel companies, including Starwood and Marriott. She noted that she had been the Director of Sales and Marketing when the first conference of the Native Hawaiian Association had taken place. She recalled the impact of that event in emphasizing the importance of a healthy future for tourism.

Her hotel employed about 600 people and had a significant island inventory. She provided statistics during regular quarterly meetings with the mayor. These figures had recently been sobering. A report from the HVCB projected double-digit declines in leisure destination bookings between 2023 and 2025, with the airlift to the islands down 9% at the start of 2025.

Group business was also declining. Ms. Vento emphasized that a destination was healthiest when it was not fully reliant on individual travel.

The Marriott group had been working hard to build 20%–25% of their large convention hotels on group business, hosting events like IMEX. Mr. Vieira also mentioned some of Marriott's initiatives. The Marriott CEO, Mr. Tony Capuano, had moved the meeting of his senior leadership team from Tokyo to Maui, and the Board of Directors' meeting was to take place there in February 2025. Several other key events were to take place in Maui.

As a company, Marriott had invested in these choices and was involved in the Los Angeles saturation program. They had also invested in digital media, and on the Marriott Bonvoy app, Maui and Hawai'i were amplified on every single search, with special offers and collaborations on marketing, digital media, and elite and membership programs.

Ms. Vento mentioned that CEO Capuano had recently spoken about Maui as a destination to 100,000 Marriott employees, and he had also appeared on Bloomberg TV to discuss the American economy, the Chinese economy, Maui, and cruises. Marriott invested all their resources in Hawai'i's recovery as a company. Wise investment required accountability and would generate revenue for stimulation and support, leading to an increased budget.

Ms. Vento recalled that Mr. McCully had asked Mr. Vieira for data, and Ms. Vento mentioned that with 9,000 hotels in 128 countries, she could obtain data through Marriott channels. Ms. Vento acknowledged that even a \$90 million budget was not enough.

She believed that a strategic campaign targeting Los Angeles should be of longer duration, and it might cost Marriott between \$8 million and \$10 million. Key cities for a strategic campaign would be Los Angeles, San Francisco, and possibly Dallas. These were markets where demand could be created. She commented that she had taken 16 trips since the beginning of the year, and formerly, airlines had operated larger planes with redeye flights. However, United Airlines is currently flying a 737 to Los Angeles with no redeye flights. The major markets were places where demand could be generated, allowing flight access to be added.

Ms. Vento believed that an investment of \$8 million to \$10 million was needed for a market saturation campaign with at least four regular campaigns. Marketing efforts were business-to-business and business-to-consumer. She and her colleagues from Marriott and other colleagues on Maui were concerned about advocating for increased funding to support associates challenged by housing costs and work opportunities.

Chair Hannemann thanked Ms. Vento. She responded that she had tried to be succinct but was always available to answer specific questions.

Chair Hanneman introduced the next guest, Mr. Josh Hargrove, the General Manager of Western Maui Resort and Spa, and requested him to limit his testimony to three minutes.

Mr. Hargrove thanked the HTA Board for their diligent work and the productive discussions during the meeting. He expressed his support for the \$150 million budget option or, alternatively, the \$90 million budget option. Mr. Hargrove had traveled extensively since the fires on Maui. He had accompanied Ms. Vento on numerous trips to key markets, such as Los Angeles, San Francisco, Portland, Seattle, and Chicago, to convey the message that it was safe to travel to Maui.

In all these markets, he had encountered similar feedback that the media had initially covered the wildfires and the ensuing tragedy but then shifted focus to other global tragedies. There had been a lack of messaging from Hawai'i about welcoming visitors, and this was unlike marketing by other regions such as Mexico, the Caribbean, Europe, and Asia, which had well-designed and well-funded plans. Hawai'i lacked visibility. Customers in the cities visited by Mr. Hargrove had inquired about the current situation and messaging. Despite Marriott's efforts, which represented the hotel rather than the destination, there was a need for collective action to communicate Maui's readiness to welcome visitors effectively.

Mr. Hargrove had been tirelessly working to help Maui residents regain their jobs. Still, his experience of walking through an empty airport, parking in an empty lot, and boarding a half-empty plane highlighted Maui's dire situation. He appreciated the opportunity to advocate for any support available. Maui's occupancy was around 40% to 50%, with no signs of improvement.

Mr. Hargrove had understood from the previous speakers that the HTA budget was projected at \$70 million, from which, after the removal of destination stewardship funds, about \$40 million to \$50 million would remain for marketing. Even at 60% of \$90 million, compared with the previous \$100 million budget, this was far from the \$150 million needed. Marriott properties on Maui had allocated a combined \$30 million for sales and marketing. Mr. Hargrove believed that collectively, across Maui, there was an annual marketing budget of approximately \$100 million. Increased contributions were necessary to help people return to work, and support from the HTA was crucial to attracting visitors back to the island.

When visitors return, rates could be increased, and all the programs needed for destination stewardship could be created. However, a revenue stream was needed so that people could return to work, earn a livelihood, and take care of their families.

Mr. Hargrove appreciated the work being done by the HTA and hoped that sufficient funding would be provided.

Chair Hannemann expressed gratitude for Mr. Hargrove's efforts.

Dir. Tokioka recalled that he had collaborated with Mr. Hargrove on various projects during the initial days of the fire and relocation, and he thanked the Board, the government, and the State for their promotional efforts. Dir. Tokioka asked for clarification about the current messaging, given that \$5 million had been allocated from the emergency budget for marketing.

Mr. Hargrove explained that customer feedback indicated that messaging had not penetrated as intended as other destinations. Customers were generally reluctant to visit Maui, believing it was still closed. Mr. Hargrove emphasized that while the Board's efforts were commendable, the message did not reach the intended audience effectively. Maui's current occupancy rate was 50%, which should prompt a reevaluation of the HTA's strategies.

Dir. Tokioka concluded that resources should not be wasted on ineffective measures and that a reassessment of the marketing approach was necessary. He thanked Mr. Hargrove for his insights.

Chair Hannemann thanked Mr. Hargrove for his presentation.

#### **5. Discussion and Action on Fiscal Year 2025 Budget BED 116 – Destination Management – DMAP (Destination Management Action Plans) Implementation Use**

The Chair moved on to Agenda Item 5. He explained that this matter had already passed through two committees, and all that was needed was for Ms. Anderson to formulate the motion.

Ms. Anderson stated that the HTA staff was asking for approval to make expenditures for FY25 from line item BD116 to conduct activities such as community meetings, gathering input, and developing plans for DMAPs and other plans to be conducted by the HTA.

Vice Chair Paishon proposed the motion to approve the expenditure of \$400,000 from BED 116, Destination Management Implementation, towards activities described in item 2. Ms. Iona seconded the motion.

There was no discussion.

The Chair asked Ms. Sanborn to conduct the roll call vote, and the motion was carried unanimously.

Chair Hannemann announced that they would be moving to Agenda Item 6 and proposed going into Executive Session because some budget-related matters concerned personnel and contracts. He asked Atty. Cole to provide his input.

Atty. Cole responded that the Executive Session was to take place pursuant to Sections 92-5(a)(8) and 201B-4(a)(2) to discuss information that should be confidential as a matter of law and which also needed to be confidential to protect Hawai'i's competitive advantage in the tourism industry.

Chair Hannemann asked for a motion, and Vice Chair Paishon proposed a motion to move into Executive Session. Ms. Iona seconded the motion.

Ms. Sanborn conducted the roll call vote, and the motion was carried unanimously.

## **6. Discussion and Action on HTA's Fiscal Year 2026 and 2027 Legislative Budget Proposal, Process, Issues, and Request**

Chair Hannemann resumed the meeting, stating that nine members were present, thus establishing a quorum. He called Mr. McCully back and announced that there would be no executive session, but instead an open session.

Dir. Tokioka asked a clarifying question regarding whether the Board would return to the executive session after briefly entering it before some members left to attend the RFP meeting. Chair Hannemann confirmed that the Board would remain in open session.

Mr. McCully returned to the session, and Chair Hannemann repeated that a quorum was present. Moving on to Agenda Item 6, the Chair announced that they would remain in open session and were ready to vote. During their meeting the previous day, he called upon Mr. Arakawa to propose the motion approved by the Budget, Finance, and Convention Center (BFCC) Standing Committee.

Mr. Arakawa stated that the motion recommended by the BFCC was for a base budget of up to \$70 million, with Supplemental 1 of up to \$10 million and Supplemental 2 of up to \$10 million, with all updates approved by the Branding and Ho'okahua Standing Committees. Mr. McCully seconded the motion.

Mr. Miyasato asked for clarification since he believed that Supplemental 2 was \$4.8 million.

Mr. Arakawa clarified that it was approximately \$4.3 million, but in light of the discussions earlier in the Board meeting, it could be increased to \$10 million. He explained that the submission process from DBEDT to DBF, to the Governor, and the legislature allowed for possible changes. Supplemental 2 of \$10 million allowed the staff to add to the existing amount during the submission process based on the discussions of the present meeting and other developments.

Mr. Miyasato expressed concern about semantics, noting that both the Branding and Marketing and the Ho'okahua Standing Committees had approved a base budget of \$80 million. He highlighted the distinction between the base budget of \$80 million and the 70, 10, 10 proposals to be voted upon. There was no disagreement about the need for a substantial budget. Still, Mr. Miyasato was concerned that Supplementals 1 and 2 did not reflect the requested figure and would make it easier to reduce the budget request.

Mr. Arakawa explained that information received the previous day from DBEDT and DBF indicated that it was permissible for Form A to include the entire amount, encompassing the base budget and the two Supplementals. It provides flexibility for adjustments as the process continues.

Mr. Miyasato continued to express his concerns, emphasizing the importance of accurately reflecting the budget in Form A. He explained that history had shown that whatever was requested on Form A had to be maintained. He asked Mr. Kishi how the budget would appear on Form A and whether Supplementals 1 and 2 could be listed along with the \$70 million base budget.

Mr. Kishi confirmed that if \$70 million were decided upon, it would be listed as such, with Supplementals 1 and 2 of \$10 million each in parentheses. Boxes were available on Form A for further justification and explanation about the budget and its components. Mr. Kishi reassured Mr. Miyasato that Form A did not comprise just a single number.

Mr. Arakawa acknowledged Mr. Miyasato's excellent question and reiterated that Form A would include both the base budget and the Supplementals. He referred to page 51, which showed \$69.9 million. He noted that Form B would also include the additional \$9.9 million shown on page 52, Supplemental 2 \$4.3 million and potentially up to \$10 million on page 53, depending on approval by DBEDT and the Governor.

Mr. Miyasato asked for confirmation that the Board would vote for a base budget of \$70 million along with Supplemental 1 of \$10 million and Supplemental 2 of 10 million. Mr. Arakawa confirmed it.

Ms. Iona asked for further clarification, noting that if she submitted a base budget to her boss, this would be what she clearly needed. If she then asked him for a supplemental budget or wish list, it would not reflect what was essential. She believed that the legislature would perceive the \$70 million base budget to comprise all that was actually needed. She wondered whether it was smart to ask for \$70 million and hope for \$10 million more.

Mr. Arakawa reminded Board members that they had submitted a request for \$60 million the previous year and received \$63 million.

Chair Hannemann corrected Mr. Arakawa that the HTA had requested \$70 million, but the Governor and the legislature had awarded only \$60 million. Afterwards, the Senate increased the amount by \$3 million.

Mr. Arakawa agreed that when the Governor's budget reached the legislature, \$60 million would be awarded.

Chair Hannemann repeated that the initial request was \$70 million the previous year, and the Governor responded with \$60 million, so the final budget was \$10 million less than the initial request.

Mr. Arakawa responded that his point was proven. The HTA requested \$90 million, and a request for \$90 million should be sent to the Governor.

Chair Hannemann suggested that the base should be set at \$90 million.

Mr. Arakawa stated that the HTA staff had worked diligently. He referred to Dir. Salaveria's presentation was at the previous Board meeting.

Ms. Iona asked Mr. Arakawa to confirm that the dialogue for this budget would be that the HTA needed \$90 million, with \$70 million as the base plus an additional \$20 million.

Mr. Arakawa responded that the request would be \$70 million plus \$10 million plus \$10 million, which would appear on Form A.

Mr. Miyasato replied that Form A was the issue. The previous year, the HTA requested \$70 million for Form A. There had been much discussion about requesting \$60 million, but VP Choy insisted on \$70 million. Using that same logic for Form A, Mr. Miyasato wanted to ensure that a base budget of \$70 million and Supplementals 1 and 2 of \$10 million each would not be interpreted the opposite way. He understood the base budget to imply the amount needed to conduct the agency's functions.

Chair Hannemann addressed Mr. Miyasato, stating that based on his experience with several budgets, the base amount was typically used as the foundation, with supplemental funds added in the second year if the initial request was not fully granted. He suggested that if the goal were \$90 million, it should be used as the base amount. If a supplement were needed, it should be requested when the base was reduced.

The Chair noted that when the staff of both the Branding and Ho'okahua Committees were asked which budget they preferred or which would enable them to achieve the Board's objectives, they clearly indicated a preference for an \$80 million base rather than starting with \$70 million and requesting additions. He concurred with Mr. Arakawa that the staff deserved commendation for their hard work.

Mr. Pfund remarked that while \$70 million plus \$10 million plus \$10 million was one approach, it might be more logical to request \$90 million as the base and then attach a schedule to prioritize it if the Governor or the legislature decided to reduce the amount. From a practical standpoint, starting with \$90 million and prioritizing seemed more logical. He emphasized that this was a biennial budget, and the motion covered two years, not being tied to exact motion numbers.

Dir. Tokioka pointed out that present decisions could not bind future legislatures.

Mr. Arakawa explained that the initial draft budget had been prepared about a month previously and submitted for guidance to DBF Dir. Salaveria and DBEDT Dir. Tokioka. Following that, the staff separated the budget into indispensable projects and lower-priority projects. They followed the advice of the DBF and DBEDT directors regarding priority items, categorizing them as high priority (\$70 million), medium priority (\$10 million), and lower priority (\$10 million).

Mr. Miyasato was reluctant to argue but emphasized the importance of being factual. He noted that there was a difference between instructions to fit the budget into \$70 million and taking advice from subject matter committees to build a plan based on requirements followed by submission of the necessary amount. Mr. Miyasato stated that the HTA staff had been instructed to “shoehorn” the budget into \$70 million.

Chair Hannemann then called on Acting CEO Daniel Nāho‘opi‘i.

Mr. Nāho‘opi‘i explained that during budget development over three weeks, the staff had been asked to comply with the BFCC’s recommendation of \$70 million. They had prioritized accordingly. However, after listening to presentations from DBF Dir. Salaveria, at the previous Board meeting, felt it was important to be honest about their needs, which led to the conclusion that \$80 million was the critical amount required.

Without the final \$10 million, the HTA could not conduct the saturation programs to stimulate bookings requested by the visitor industry. They could also not continue airport greetings, develop sports tourism, increase presence at major trade shows, and enhance workforce development. These programs, though initially prioritized lower, were realized to be critical.

Mr. Nāho‘opi‘i suggested starting with \$80 million and then adding \$10 million. The return on the additional \$10 million was estimated to be about \$220 million in tax revenue based on campaign effectiveness studies and trade show returns. He reminded everyone that in FY24, the budget was only \$56.7 million, despite the request for \$70 million, resulting in their working at a deficit with limited programming. This was why major programs and campaigns had to be eliminated, making it difficult to induce recovery in bookings. As Mr. Vieira had mentioned, significant effort was needed both in the U.S. market and in redeveloping international markets.

Chair Hannemann then called on Mr. White.

Mr. White expressed his encouragement, noting that the budget proposals were significantly higher than their previous levels. However, what truly mattered was the outcome at the end of the legislative session. He highlighted the need for a concerted effort by the HTA, the visitor industry, and the community to present a unified case to the legislature.

Mr. White had observed two key points in Mr. Vieira’s comments. Firstly, he noted Hawai‘i’s apparent lack of visibility at trade shows. Even with an \$80 million budget, Hawai‘i was still being outspent by other destinations, such as Puerto Rico, which had impressive trade show displays. Mr. White reminded Board members that trade shows were crucial to allowing Hawai‘i to communicate directly with those selling the destination. He commented that two members of the Maui County Council, who had initially been unsupportive of the Maui Visitors’ Bureau’s expenditures, had been impressed after attending trade shows and witnessing the efforts required to generate business.



Mr. White's second point referred to the saturation marketing campaign in Los Angeles. While the HTA could ask the industry to participate, the HTA itself was the campaign's core. He emphasized the need to communicate these efforts to the legislature and better demonstrate the return on investment from marketing campaigns. He assumed that the results of the saturation campaign in Los Angeles would be tracked. Combining data from previous marketing campaigns with current information could justify a more robust budget as long as the State could afford it. He expressed confidence that the legislature would allocate the necessary funds, focusing on the final outcome rather than the starting point. Finally, Mr. White stated that he hoped for a unanimous vote on the budget proposal.

Mr. Miyasato acknowledged the importance of Mr. White's point, noting the Senate Ways and Means Committee.

Ms. Anderson commented that members were now requesting \$150 million.

Mr. Ka'anā'anā reminded members that the session was public, and Mr. Arakawa thanked him for this timely reminder.

Mr. Nāho'opi'i re-emphasized the importance of ROI, citing a campaign effectiveness study. He estimated that the investment of \$4.4 million for the U.S. market and \$722,000 for Japan, along with the IMEX booths, would collectively generate \$220 million in State tax revenue.

Mr. McCully asked for confirmation of the amount mentioned by the previous speaker. Mr. Nāho'opi'i confirmed that he had cited a total of \$5.15 million and added that this contribution would yield a 43 to 1 return in State tax revenue. At the same time, actual visitor expenditure would exceed the generated tax revenue.

Mr. McCully asked about contributions from industry partners such as airlines and hotels. Mr. Nāho'opi'i explained that, while exact figures for matching cooperatives were not available, partners' contributions were typically in the range from 3:1 to 5:1, either in finance or in kind.

Mr. McCully expressed his confidence that the legislature would understand these figures, while Mr. Nāho'opi'i stated the determination of the HTA staff to develop and report these statistics.

Mr. McCully responded that the current situation was an improvement, as it was now possible to track the effectiveness of marketing expenditures, unlike in the past when it was unclear which efforts had yielded results.

Dir. Tokioka stated that they had encountered this situation before. He emphasized that his position differed from that of the Board members because the final decision would ultimately come to him. His directive came from the Governor and Dir. Salaveria of DBF, who had addressed the Board at the previous meeting. Although there were different interpretations of the directive, it was clear that the administration, including all 17 agencies under DBEDT and other State government departments, the legislature, and the Ways and Means and Finance

Committees, were urging fiscal responsibility. The Governor's main priority was housing, managed by the Hawai'i Housing Finance & Development Corporation (HHFDC) under DBEDT. The question was whether to provide substantial funds for HHFDC, which focused on housing for local residents or to allocate an additional \$16 million to the HTA to increase revenues.

While acknowledging Ms. Chun's excellent work, Dir. Tokioka noted the difficulty in reliably demonstrating the ROI for certain expenditures, a point raised by Mr. Miyasato. Dir. Tokioka's background was in the hotel industry, in which he had risen from a busboy to a general manager. Despite criticism, he had consistently supported the visitor industry at the State Capitol. However, he recognized that the current situation required adherence to his superior's directives.

Dir. Tokioka did not enjoy opposing a budget higher than the one that he had supported in the BFCC committee, but he appreciated Mr. White's remarks. Industry stakeholders wanted clear explanations of the goals of the HTA. Income tax relief needed to be funded, and revenue shortfalls had to be addressed. The Maui wildfires had resulted in expenditure of \$480 million. Additionally, the State has not yet been reimbursed by the Federal Emergency Management Authority (FEMA) for the volcanic eruption that occurred in May 2018. The State would have to cover the costs for Maui, with potential reimbursement or de-obligation for Hawai'i. Dir. Salaveria was responsible for a five-year plan, and these were all important considerations for him.

Dir. Tokioka explained that while the fund balance was currently high, it would decrease after covering these expenses. He regretted that his responsibilities precluded him from being able to support a larger budget. He referred to the testimony from Mr. Hargrove, who reported not hearing any effective messaging despite the funds spent on programs. It was important to identify which programs were effective.

He and Mr. Nāho'opi'i had observed good programs during their visits to Korea and Japan, but it was necessary to determine which actions were most effective. He appreciated the Board members' time and did not want to prolong the discussion, acknowledging that everyone was in the same situation. Still, he had to explain that his own perspective was different. He wished he could support a larger budget but had different responsibilities.

Mr. Pfund gave his opinion that the primary duty of HTA Board members was to the HTA and the visitor industry. Their focus must be on a budget that would support the industry. He agreed that there were external concerns regarding the overall state budget, but he believed that the first duty of Board members was to the organization. In his opinion, a higher budget amount was appropriate.

Mr. Arakawa expressed his concern about two issues. The first was that Mr. Nāho'opi'i had begun expressing support for the \$80 million budget with the phrase "to be honest." Mr. Arakawa had spoken with Mr. Nāho'opi'i on the morning of the Branding committee meeting,

and they had agreed on the 70, 10, 10 staff recommendations. Mr. Arakawa was surprised to hear about the \$80 million figure afterward. The staff worked on high, medium, and low priorities for three weeks, which then changed within a couple of days.

Mr. Arakawa's second issue concerned page 4 of the minutes from the previous Executive Session, which included testimony from Dir. Salaveria about the poor financial outlook for FY26/27 and lower tax collections.

Atty. Cole interrupted Mr. Arakawa on a point of order regarding the confidential nature of the Executive Session and its minutes.

Mr. Arakawa responded that everyone who quoted Dir. Salaveria referred to the same meeting. However, he agreed not to refer to the minutes. He recalled that Dir. Given the State's financial problems, Salaveria had discussed several financial issues and indicated that a \$63 million base budget would be a significant advantage, given the State's financial problems. Mr. Arakawa reminded Board members that some had been called to the fifth floor and advised them that trust was an issue. He suggested that if members' allegiance were solely to the tourism industry and not to the State, their request should be for \$150 million. He recalled being told that Board members' loyalty should be to the State of Hawai'i, the administration, the legislature, and the counties, not just the tourism industry.

Mr. Pfund remarked that steps had to be taken to demonstrate the HTA's ability to generate returns using the requested funds. Comparing the tourism industry to other departments, he noted that while other departments primarily used funds, the tourism industry generated tax revenues, income taxes from employees, and fees for airports, harbors, and highways. This revenue could help other departments and address shortfalls in State finances. He hoped that over time, the budget request could be increased.

Mr. Nāho'opi'i responded to the issue of staff recommendations for the budget. He explained that after the previous board meeting, staff had consulted with each subject matter committee to determine the critical level of funding needed. The Branding and Ho'okahua Committees had indicated that they required additional amounts. On the previous Wednesday, the staff had met again with leadership and managers. Based on what they had heard at the previous Board meeting, they decided that the base budget should be \$80 million, possibly adding another \$10 million.

Mr. Miyasato asked Mr. Nāho'opi'i whether it was true that all the items discussed, including cooperation with other partners, were included in Supplemental 1 of \$10 million. Mr. Miyasato noted that partners' contributions would be evaluated upon the team's return from the Los Angeles saturation campaign. A significant part of the Branding and Marketing budget was to facilitate such cooperation, in which the HTA would provide \$10 million. In comparison, industry partners would match this with a \$20 million contribution, which was not part of the

base budget of \$70 million. This supported a base budget of \$80 million because base components were included within that range.

Mr. Nāho'opi'i stated that it was necessary to maintain a base budget of \$70 million for the U.S. market so that general brand awareness would continue at the same level as the present year. \$1.5 million had been requested for an activation. Mr. Nāho'opi'i believed that if regular activations were to be conducted, as Mr. Vieira had suggested, they should be financed from the base budget. Maintenance of the same level of brand awareness appeared not to have been effective over the previous year.

Chair Hannemann recalled that votes for special budget requests were not always carried unanimously by the Board. Including the necessary funds in the base budget would facilitate this issue.

The Chair emphasized that no one had a greater appreciation for the work of the director of DBEDT than himself, having previously held that position. He also understood the responsibilities of a chief executive, having served as a mayor. He acknowledged the competing interests and priorities that needed to be considered. In all his conversations with the Governor regarding the HTA budget, the Governor never suggested requesting a lesser amount. Both Gov. Green and Dir. Salaveria had indicated that the HTA should ask for the funds they required. Chair Hannemann concluded that the Governor and the legislature should be left to decide whether funds should be allocated to housing or tourism.

Chair Hannemann continued by stating that the responsibility of the HTA was to promote and support the State's largest industry, which had the greatest potential to generate revenue in both the short and the long term. This was why he would support a base budget of \$90 million if presented. It was well understood that the initial budget request was likely to be reduced by the legislature, which had the authority either to increase or decrease the budget. While Chair Hannemann would have liked to follow the advice of Dir. Tokioka of DBEDT had to acknowledge the recommendation of the HTA staff. He stated that it was clear that without a budget of \$80 million, none of the programs mentioned by Mr. Vieira and Mr. Lewis would be implemented.

Chair Hannemann called for the vote.

Mr. Arakawa proposed the motion to recommend the approval of the proposal of the BFCC Standing Committee, with a base budget of up to \$70 million, Supplemental 1 of an additional \$10 million, and Supplemental 2 of up to \$10 million, to include the updates approved by both the Branding and the Ho'okahua Standing Committees.

Dir. Tokioka seconded the motion.

Ms. Sanborn conducted the roll call vote as follows:

Chair Hannemann, Nay

Vice-Chair Paishon, Nay

Ms. Agas, Aye  
Mr. Arakawa, Aye  
Ms. Iona, Nay  
Mr. McCully, Aye  
Mr. Miyasato, Nay  
Mr. Pfund, Nay  
Dir. Tokioka, Aye  
Mr. West was excused  
Mr. White, Nay

Ms. Sanborn tallied the votes and announced that there were four Aye votes and six Nay votes. The motion was not carried.

Mr. Arakawa stated that there was no second motion.

Chair Hannemann proposed a motion to approve a base budget of \$80 million, including the increases that the Branding Standing Committee had approved for marketing and Ho'okahua Standing Committee for destination management.

Vice-Chair Paishon seconded the motion.

Chair Hannemann called for the roll call vote.

Ms. Sanborn conducted the roll call vote as follows:

Chair Hannemann, Aye  
Vice-Chair Paishon, Aye  
Ms. Agas, Nay  
Mr. Arakawa, Nay  
Ms. Iona, Aye  
Mr. McCully, Aye  
Mr. Miyasato, Aye  
Mr. Pfund, Aye  
Dir. Tokioka, Nay  
Mr. West was excused  
Mr. White, Aye

Ms. Sanborn tallied the votes and announced that there were seven Aye votes and three Nay votes. The motion was carried.

Chair Hannemann announced that the Hawai'i Tourism Conference was scheduled from September 30 to October 2. He asked Board members to encourage associates, workers, and friends to sign up, highlighting it as a great opportunity to unite everyone. The Governor, members of the legislature, and other leaders will be in attendance.

Secondly, the saturation campaign in Los Angeles was to begin shortly, with participation from Gov. Green and Mayor Bissen of Maui and several members of the State legislature.

A group of legislators was to travel to Japan as part of the HTA's efforts to redevelop the Japan market.

Mr. Miyasato expressed his appreciation for the honesty among Board members and extended his respect to those who supported the motion that was not carried out. He believed that the Board members collaborated well as a team.

Chair Hannemann requested members to consider suggesting slates for the Standing Committees, noting that when the committee had only four members, the absence of one member prevented the establishment of a quorum.

With no further business, the meeting was adjourned.

## **7. Adjournment**

The meeting adjourned at 12:25 p.m.

Respectfully submitted,



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Sheillane Reyes  
Recorder

9

**Presentation and Discussion of Current  
Market Insights and Conditions in Hawai'i and  
Key Major Hawai'i Tourism Updates**

# HTA REGULAR BOARD MEETING

Thursday, October 3, 2024

*Hō‘ike ‘Ikepili Noi‘i ‘Oihana Ho‘omāka‘ika‘i*

Presentation and Discussion of Current Market Insights and Conditions in Hawai‘i and Key Major Hawai‘i Tourism Markets, including the United States, Japan, Canada, Oceania, and Cruise

Jennifer Chun

Director of Tourism Research



STATE OF HAWAII • DEPARTMENT OF BUSINESS,  
ECONOMIC DEVELOPMENT & TOURISM

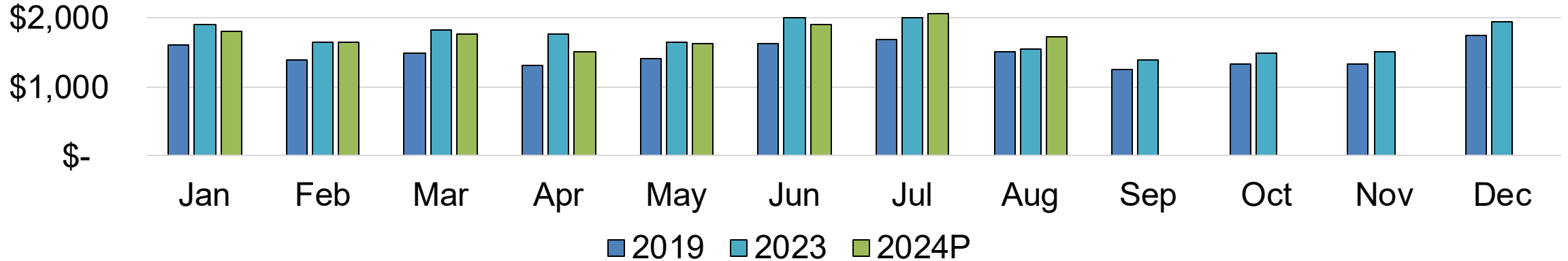


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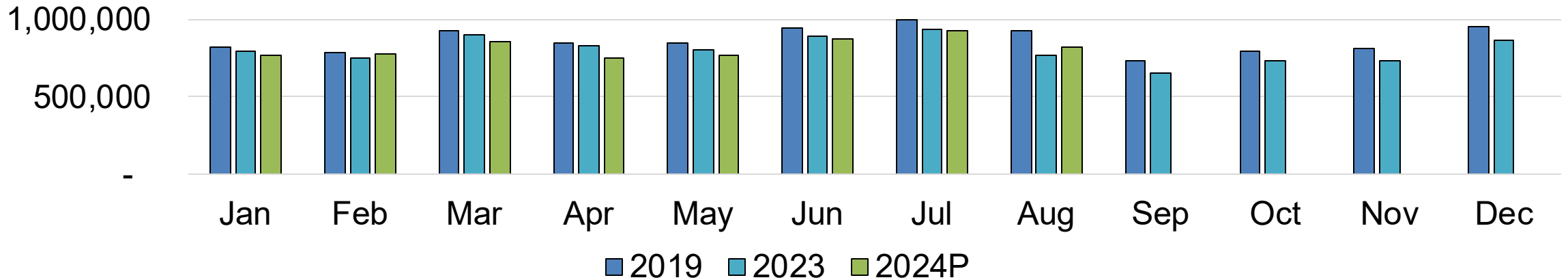
- Annual Visitor Research Reports
- Monthly Highlights
  - Visitor Expenditures and Visitor Arrivals
  - Highlights by Market and Island
  - Purpose of Trip
  - Accommodation Choice
  - Hawai'i Airport Throughput
  - Load Factors
  - Lodging Performance
  - Air Seat Outlook
- Market Trends and Insights
  - Skift Travel Health Index
  - US Travel Association Dashboards
- Market Sizing
- Air Ticket Booking Trends

# August 2024 Highlights – Expenditures and Arrivals

## Monthly Visitor Expenditures (\$millions)



## Monthly Visitor Arrivals



Note: 2024 figures are preliminary.

# August 2024 Highlights by Market

EXPENDITURES (\$mil.)	2024P	2023	2019
TOTAL (AIR)	1,723.1	1,546.0	1,502.9
U.S. West	793.8	679.6	579.3
U.S. East	468.7	435.3	379.1
Japan	95.6	123.4	236.9
Canada	56.6	57.9	57.2
All Others	308.3	249.8	250.3

PPPD SPENDING (\$)	2024P	2023	2019
TOTAL (AIR)	248.3	232.5	191.7
U.S. West	230.1	211.5	167.4
U.S. East	264.5	249.5	205.7
Japan	231.3	234.0	228.4
Canada	236.9	224.7	178.2
All Others	289.8	276.2	212.2

VISITOR ARRIVALS	2024P	2023	2019
TOTAL (AIR)	819,152	766,573	926,417
U.S. West	432,919	392,704	420,750
U.S. East	192,398	183,226	199,659
Japan	63,964	77,090	160,728
Canada	24,509	23,382	28,672
All Others	105,362	90,172	116,608

AVERAGE DAILY CENSUS	2024P	2023	2019
TOTAL (AIR)	223,841	214,452	252,916
U.S. West	111,313	103,674	111,617
U.S. East	57,172	56,286	59,441
Japan	13,335	17,019	33,458
Canada	7,708	8,308	10,358
All Others	34,313	29,166	38,042

Note: 2024 figures are preliminary.

# August 2024 Highlights by Island

EXPENDITURES (\$mil.)	2024P	2023	2019
O'ahu	916.0	813.5	732.0
Maui	366.0	242.3	404.7
Moloka'i	1.2	2.0	1.7
Lāna'i	8.0	6.0	12.4
Kaua'i	209.8	234.7	159.0
Hawai'i Island	222.1	247.4	193.1

PPPD SPENDING (\$)	2024P	2023	2019
O'ahu	256.4	224.2	187.1
Maui	247.2	270.2	202.2
Moloka'i	158.8	150.2	105.3
Lāna'i	517.2	434.3	512.8
Kaua'i	250.8	248.4	190.9
Hawai'i Island	216.4	215.0	183.2

VISITOR ARRIVALS	2024P	2023	2019
O'ahu	512,661	507,521	575,070
Maui	204,596	113,771	273,638
Moloka'i	1,975	2,101	4,860
Lāna'i	4,420	4,476	7,739
Kaua'i	118,608	129,853	120,030
Hawai'i Island	145,101	154,739	157,544

AVERAGE DAILY CENSUS	2024P	2023	2019
O'ahu	115,233	117,047	126,206
Maui	47,766	28,927	64,553
Moloka'i	241	435	523
Lāna'i	497	448	779
Kaua'i	26,993	30,473	26,865
Hawai'i Island	33,111	37,123	33,989

Note: 2024 figures are preliminary.

# August 2024 Highlights – Purpose of Trip

PURPOSE OF TRIP - % Total	Total by Air		US West		US East		Japan		Canada	
	2024P	2019	2024P	2019	2024P	2019	2024P	2019	2024P	2019
Pleasure (Net)	84.2%	87.5%	83.9%	86.3%	80.2%	83.7%	87.9%	92.8%	90.6%	96.0%
Honeymoon/Get Married	3.4%	4.3%	2.8%	3.3%	4.1%	5.0%	4.9%	5.8%	3.0%	4.4%
Honeymoon	2.9%	3.8%	2.2%	2.7%	3.6%	4.5%	4.8%	5.4%	2.5%	3.9%
Get Married	0.6%	0.7%	0.6%	0.7%	0.7%	0.8%	0.6%	0.9%	0.6%	0.5%
Pleasure/Vacation	81.3%	83.7%	81.6%	83.5%	76.6%	79.4%	83.8%	87.4%	88.3%	92.1%
Mtgs/Conventions/Incentive	3.3%	2.7%	2.1%	1.9%	3.9%	3.8%	10.6%	3.7%	2.7%	0.8%
Conventions	1.8%	0.9%	1.4%	0.8%	2.8%	1.3%	0.2%	0.2%	1.4%	0.4%
Corporate Meetings	0.6%	0.7%	0.6%	0.8%	0.9%	1.3%	0.2%	0.2%	0.2%	0.1%
Incentive	1.1%	1.2%	0.2%	0.5%	0.4%	1.6%	10.3%	3.3%	1.1%	0.3%
Other Business	2.4%	2.2%	2.8%	3.0%	3.3%	3.1%	0.3%	0.3%	0.5%	0.5%
Visit Friends/Rel.	9.7%	7.4%	10.7%	9.3%	11.9%	9.8%	1.6%	1.4%	5.1%	2.8%
Gov't/Military	1.3%	0.9%	0.9%	0.7%	3.0%	2.2%	0.1%	0.1%	0.2%	0.1%
Attend School	0.8%	0.7%	0.8%	0.7%	0.6%	0.5%	0.8%	1.0%	0.4%	0.1%
Sport Events	1.4%	0.9%	1.6%	1.2%	1.0%	0.7%	0.3%	0.1%	2.5%	1.4%
Other	3.4%	3.2%	3.6%	3.3%	4.0%	3.3%	2.4%	3.5%	3.1%	1.8%

Note: 2024 figures are preliminary.

# August 2024 Highlights – Accommodation Choice

ACCOMMODATIONS - % Total	Total by Air		US West		US East		Japan		Canada	
	2024P	2019	2024P	2019	2024P	2019	2024P	2019	2024P	2019
Plan to stay in Hotel	61.1%	61.1%	55.8%	52.8%	60.7%	60.6%	75.0%	76.7%	65.4%	51.3%
Plan to stay in Condo	12.7%	16.1%	13.8%	17.7%	11.0%	12.5%	15.9%	16.8%	17.3%	28.4%
Plan to stay in Timeshare	8.5%	8.7%	9.7%	10.0%	7.9%	8.0%	12.7%	10.3%	6.6%	6.9%
Cruise Ship	1.4%	1.4%	0.6%	0.6%	3.4%	3.2%	0.1%	0.2%	1.6%	1.8%
Friends/Relatives	10.1%	8.3%	11.2%	10.3%	12.0%	10.8%	1.4%	1.6%	5.4%	4.8%
Bed & Breakfast	0.9%	1.1%	0.8%	1.1%	0.9%	1.3%	0.1%	0.0%	1.0%	2.1%
Rental House	10.3%	10.1%	11.3%	12.3%	11.7%	11.8%	0.2%	0.7%	10.2%	15.9%
Hostel	0.8%	0.7%	0.5%	0.6%	0.7%	0.7%	0.0%	0.1%	1.0%	2.2%
Camp Site, Beach	0.4%	0.5%	0.4%	0.5%	0.5%	0.6%	0.0%	0.2%	0.6%	1.6%
Private Room in Private Home**	1.2%	1.3%	1.0%	1.2%	0.9%	1.4%	0.3%	0.1%	1.2%	2.2%
Shared Room/Space in Private Home**	0.3%	0.5%	0.3%	0.5%	0.3%	0.9%	0.1%	0.0%	0.2%	0.8%
Other	1.9%	1.5%	2.1%	2.0%	2.5%	1.9%	0.2%	0.1%	1.5%	1.7%

Note: 2024 figures are preliminary.

# August 2024 Highlights – Hawai‘i Airport Throughput

## Throughput by Week

State: Hawaii; Airport: All



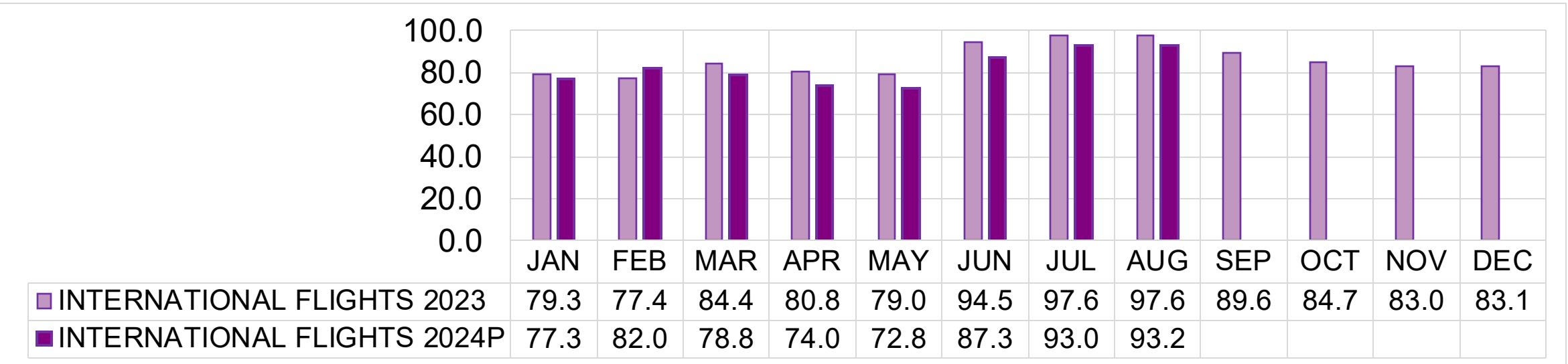
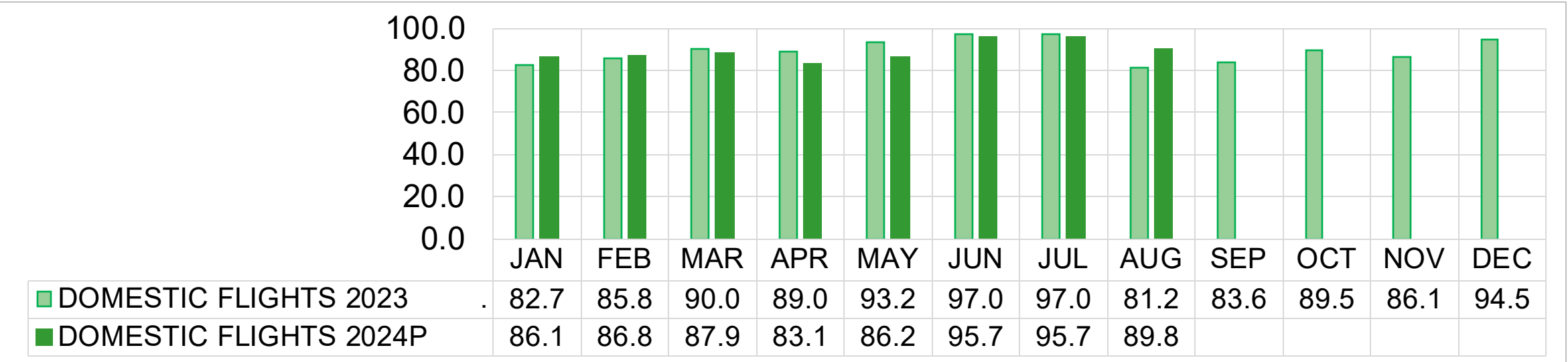
## Hawaii Airports

Throughput for the last 6 months, % change compared to 2023

	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24
All Airports	-3%	-4%	-4%	-4%	-2%	4%
Daniel K. Inouye International Airport	5%	3%	2%	2%	4%	4%
Kahului	-20%	-20%	-19%	-19%	-19%	18%
Ellison Onizuka Kona International Airport	-5%	-3%	-5%	-5%	-2%	-5%
Lihue	-1%	-6%	-5%	-1%	-1%	-6%
Hilo International	0%	7%	1%	-2%	4%	-1%

Source: Transportation Security Administration by Tourism Economics

# August 2024 Highlights – Load Factors



Note: 2024 figures are preliminary.



# August 2024 Highlights - Lodging

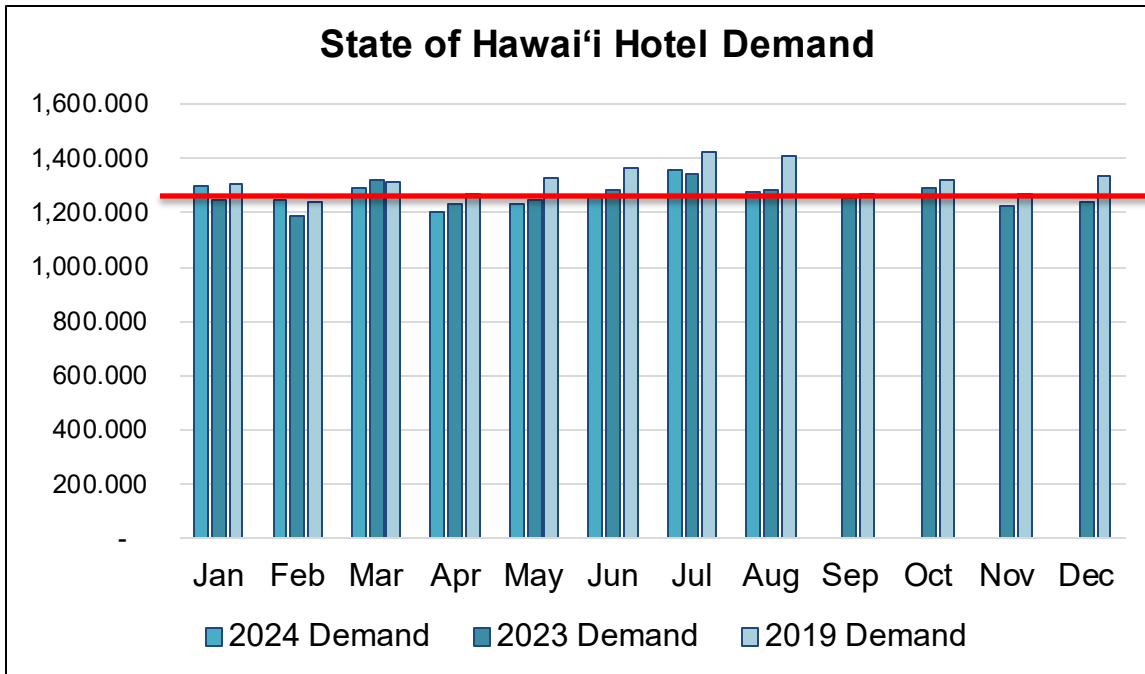
## State of Hawai'i Hotel Performance

	2024	2023	2019
Occupancy	73.6%	74.1%	84.1%
ADR	\$362	\$373	\$290
RevPAR	\$266	\$276	\$244

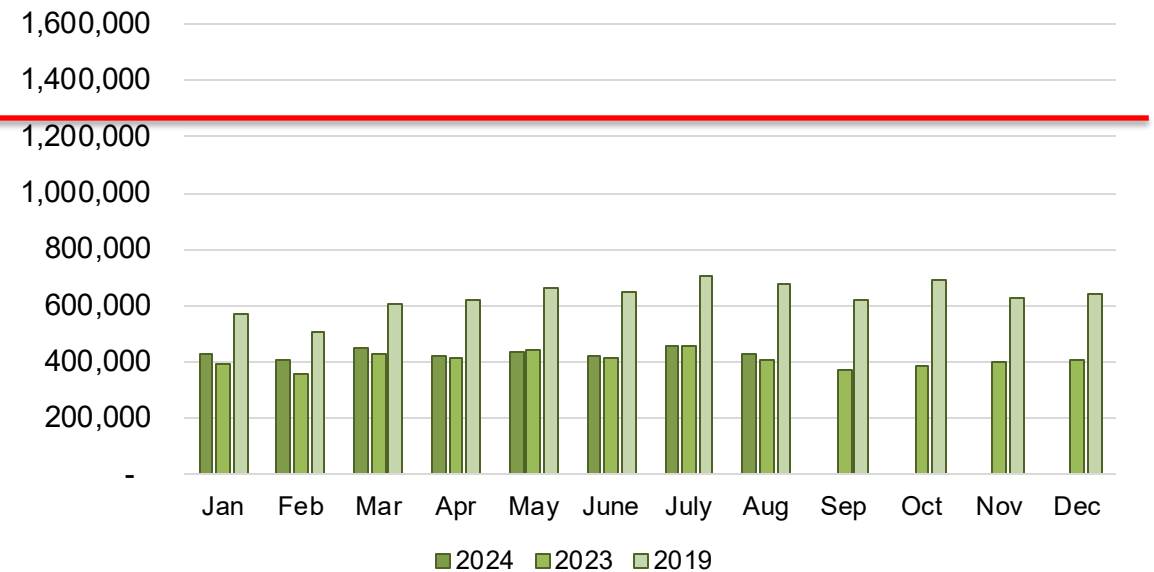
## State of Hawai'i Vacation Rental Performance

	2024	2023	2019
Occupancy	49.8%	54.4%	74.3%
ADR	\$319	\$279	\$204

### State of Hawai'i Hotel Demand



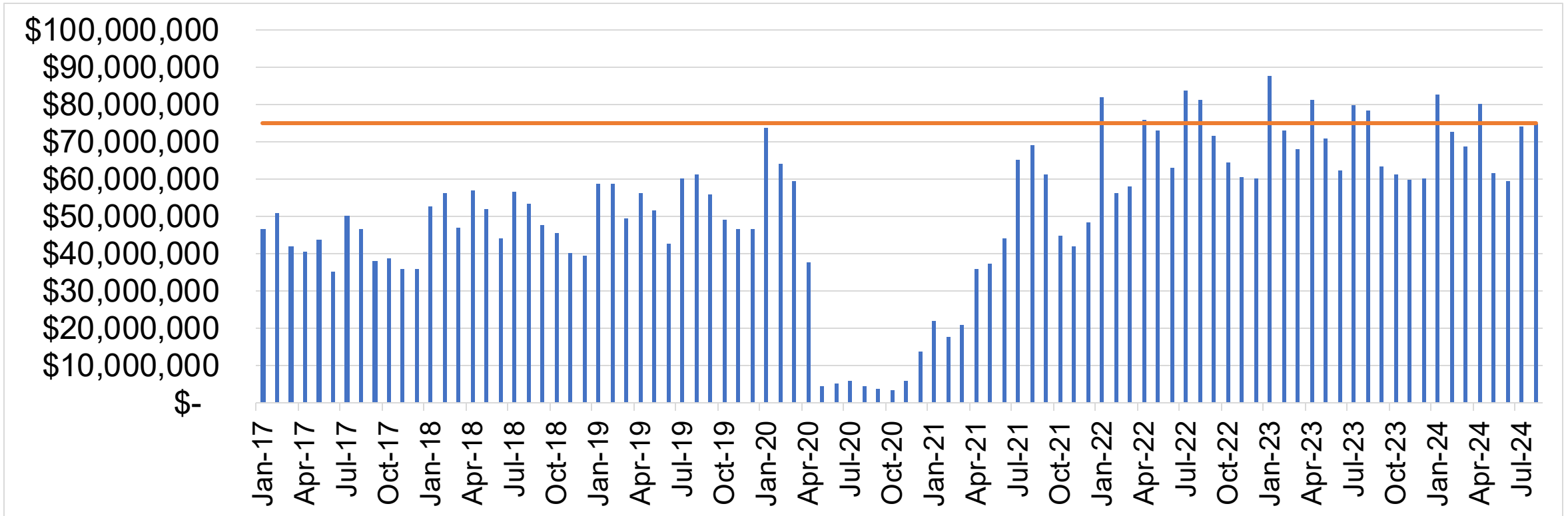
### State of Hawai'i Vacation Rental Demand



Source: STR, Inc. © Copyright 2024 Hawai'i Tourism Authority; Transparent Intelligence, Inc. © Copyright 2024 State of Hawai'i Department of Business, Economic Development & Tourism

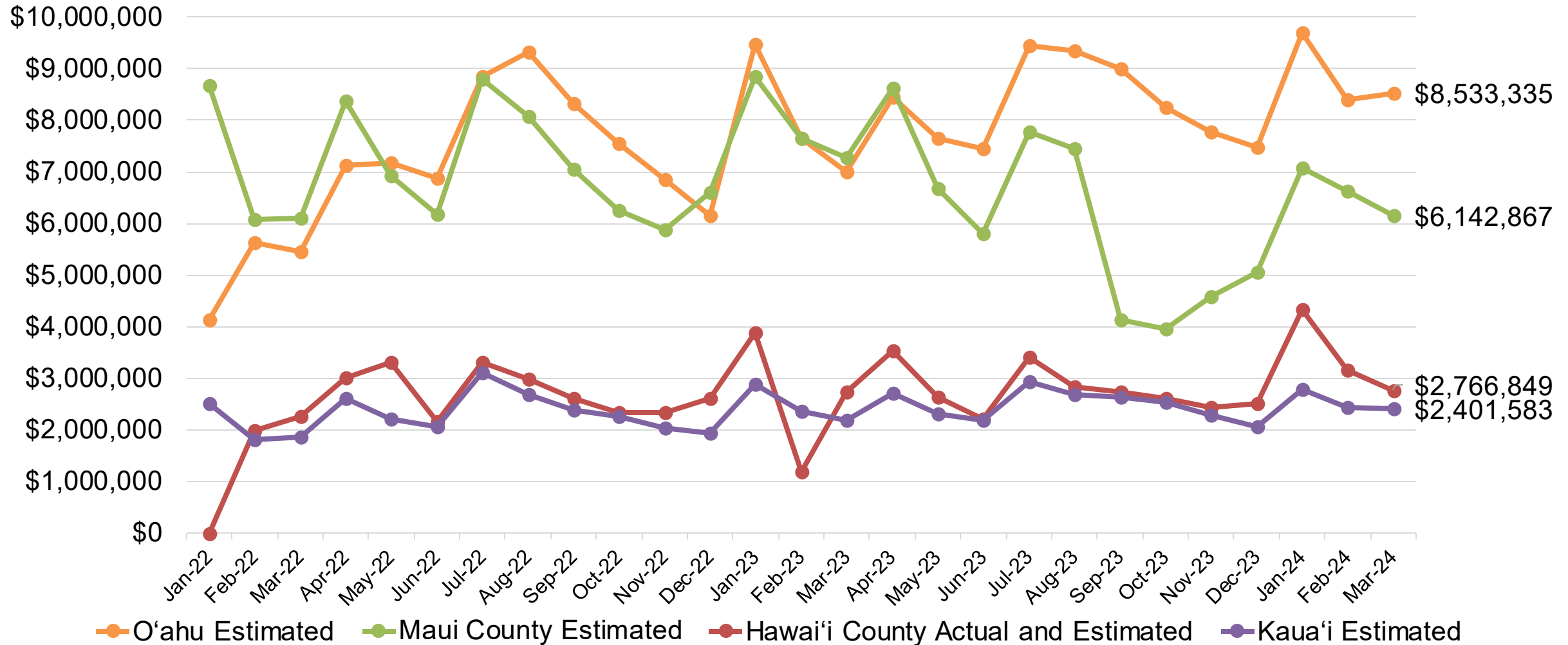
# August 2024 Highlights - State TAT Collections

- Preliminary August 2024 TAT Collections: \$74.9 million
- Preliminary YTD Fiscal 25 TAT Collections: \$149.1 million (-4.3%)
- YTD Fiscal 24 TAT Collections: \$158.2 million (-9.1 million)



Source: Department of Taxation

# Estimated County TAT Collections (no update available)



Source: Department of Taxation Transient Accommodation Tax Base



# Scheduled Nonstop Seats to Hawai'i by Port Entry

August	Total			Domestic			International		
	2024	2023	2019	2024	2023	2019	2024	2023	2019
STATE	996,359	961,818	1,006,682	794,767	780,728	711,856	201,592	181,090	294,826
HONOLULU	646,591	628,998	660,257	448,827	452,894	382,095	197,764	176,104	278,162
KAHULUI	181,692	160,238	204,791	177,864	155,252	197,711	3,828	4,986	7,080
KONA	95,472	101,423	74,540	95,472	101,423	64,956	0	0	9,584
HILO	0	0	3,486	0	0	3,486	0	0	0
LIHU'E	72,604	71,159	63,608	72,604	71,159	63,608	0	0	0

September	Total			Domestic			International		
	2024	2023	2019	2024	2023	2019	2024	2023	2019
STATE	996,359	961,818	1,006,682	794,767	780,728	711,856	201,592	181,090	294,826
HONOLULU	646,591	628,998	660,257	448,827	452,894	382,095	197,764	176,104	278,162
KAHULUI	181,692	160,238	204,791	177,864	155,252	197,711	3,828	4,986	7,080
KONA	95,472	101,423	74,540	95,472	101,423	64,956	0	0	9,584
HILO	0	0	3,486	0	0	3,486	0	0	0
LIHU'E	72,604	71,159	63,608	72,604	71,159	63,608	0	0	0

Source: DBEDTREAD analysis based on scheduled flights from Diio Mi flight schedules as of September 23, 2024, subject to change



# Scheduled Nonstop Seats to Hawai'i by Port Entry

October	Total			Domestic			International		
	2024	2023	2019	2024	2023	2019	2024	2023	2019
<b>STATE</b>	1,036,058	1,010,065	1,057,045	828,509	817,167	760,985	207,549	192,898	296,060
<b>HONOLULU</b>	668,569	660,325	673,909	467,592	475,470	399,574	200,977	184,855	274,335
<b>KAHULUI</b>	185,388	165,647	222,366	179,845	158,916	211,816	5,543	6,731	10,550
<b>KONA</b>	104,235	112,350	83,243	103,380	111,386	72,590	855	964	10,653
<b>HILO</b>	0	0	4,648	0	0	4,648	0	0	0
<b>LIHU'E</b>	77,866	71,743	72,879	77,692	71,395	72,357	174	348	522

November	Total			Domestic			International		
	2024	2023	2019	2024	2023	2019	2024	2023	2019
<b>STATE</b>	1,062,325	1,044,882	1,066,503	834,902	815,496	764,288	227,423	229,386	302,215
<b>HONOLULU</b>	677,156	673,275	656,979	476,304	474,908	395,176	200,852	198,367	261,803
<b>KAHULUI</b>	199,118	188,691	231,519	182,390	169,661	209,739	16,728	19,030	21,780
<b>KONA</b>	107,023	113,970	93,017	99,442	104,765	78,213	7,581	9,205	14,804
<b>HILO</b>	0	0	3,818	0	0	3,818	0	0	0
<b>LIHU'E</b>	79,028	68,946	81,170	76,766	66,162	77,342	2,262	2,784	3,828

Source: DBEDTREAD analysis based on scheduled flights from Diio Mi flight schedules as of September 23, 2024, subject to change



# MARKET TRENDS AND INSIGHTS



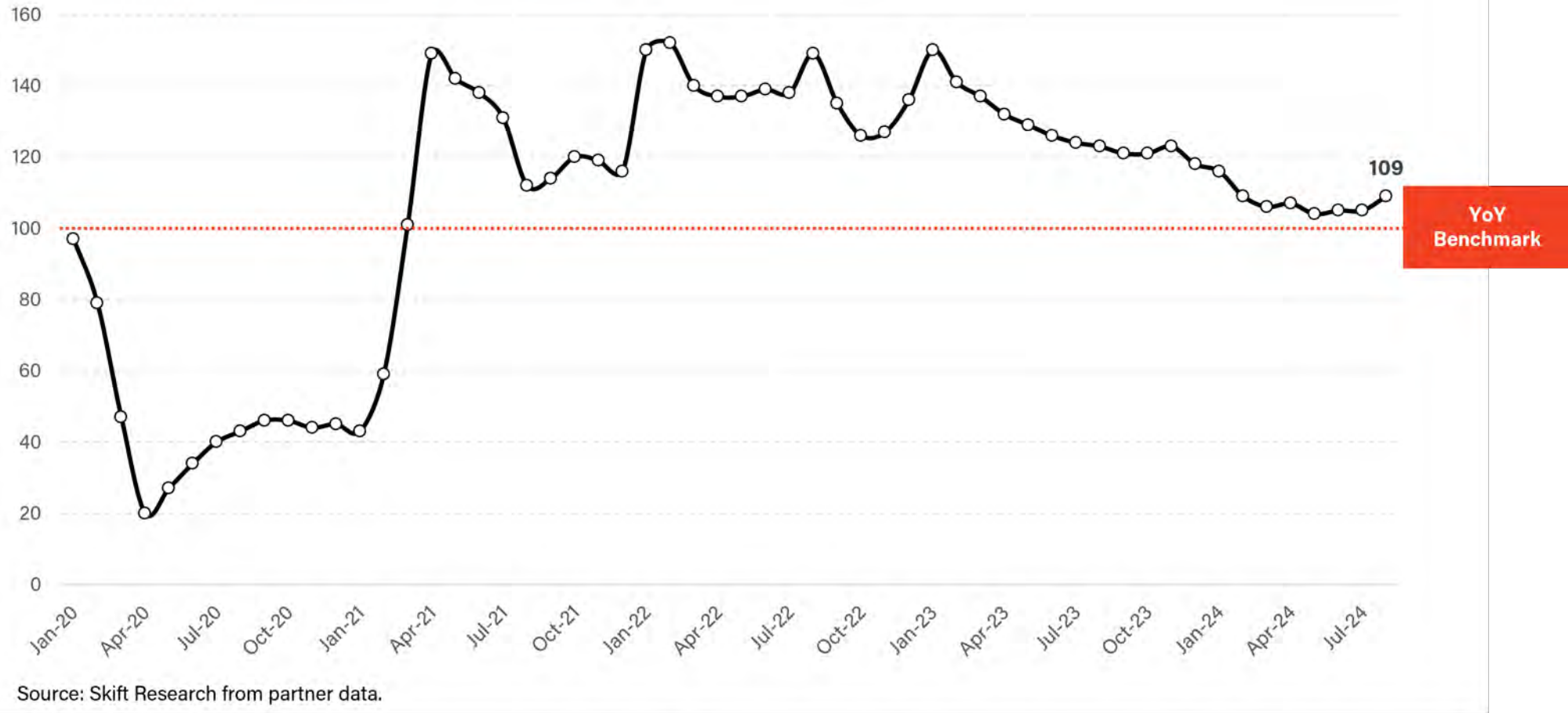
STATE OF HAWAII • DEPARTMENT OF BUSINESS,  
ECONOMIC DEVELOPMENT & TOURISM



# Skift Travel Health Index = 109

## The Global Travel Health Index Has Grown 9% Compared to August 2023

Weighted Average (Index Benchmarked to the Same Month in the Previous Year)



Source: Skift Research

# National Travel Indicators

July, 2024

Compare to Prior Year or 2019  
Previous Year



## Travel Spending\*

(Tourism Economics)

**\$115.8B**

↗ +1.6%

July vs. Previous Year

↗ +2.3%

YTD vs. Previous Year



## Air Passengers

(TSA)

↗ +5.2%

July vs. Previous Year

↗ +6.8%

YTD vs. Previous Year



## Overseas Arrivals

(NTTO)

↗ +9.2%

July vs. Previous Year

↗ +16.7%

YTD vs. Previous Year



## Hotel Demand

(STR)

**0.0%**

July vs. Previous Year

↗ +0.1%

YTD vs. Previous Year



## Short-term Rental Demand

(AIRDNA)

↗ +8.7%

July vs. Previous Year

↗ +7.8%

YTD vs. Previous Year

## Insights

Air passenger volume continued to expand, growing 5% year-over-year in July after posting 6% growth in June.

Overseas arrivals continued to make gains, growing 9% in July after 14% in June. Overseas arrivals for the year through July have recovered to 85% of 2019 volumes.

Hotel room demand in July matched last year with no growth.

Group room demand for the top 25 markets grew 6% year-over-year after flattening 2% growth in June.

Short-term rental demand continued to grow at a modestly slower pace in July (+9%) compared to June (+10%).

## Travel Indicators

% change relative to same month vs. Previous Year

	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Travel Spending (Tourism Economics)	7.1%	7.7%	5.1%	5.6%	4.7%	1.3%	2.2%	0.8%	2.9%	4.8%	2.5%	1.6%
Air Passengers (TSA)	11.1%	10.4%	11.7%	10.6%	9.7%	5.8%	10.7%	7.3%	5.1%	7.7%	6.3%	5.2%
Overseas Arrivals (NTTO)	27.2%	28.0%	21.4%	23.9%	23.7%	24.0%	25.8%	25.4%	9.2%	17.5%	13.7%	9.2%
Hotel Demand (STR)	-0.1%	-0.2%	-1.3%	-0.8%	-1.2%	-1.2%	-0.8%	-1.9%	1.7%	2.0%	0.3%	0.0%
Top 25 Group Hotel Demand** (STR)	3.1%	-0.8%	2.1%	2.3%	-8.2%	9.2%	9.8%	-4.3%	11.3%	6.2%	1.6%	5.7%
Short-term Rental Demand (AIRDNA)	-1.1%	1.6%	4.1%	5.3%	2.8%	0.1%	11.5%	10.5%	0.4%	11.5%	10.0%	8.7%
National Park Visits (National Park Service)	3.7%	2.3%	3.6%	1.4%	-4.9%	-6.8%	-0.6%	9.4%	0.4%	-5.1%	2.9%	-2.8%

-8.2% 28.0%



Compare to Previous Year

## Insights

Mixed data at the start of Q3 point to a gradual slowdown, but nothing worse. Pay and job growth are slowing but with household balance sheets strong, consumers are expected to keep spending at a steady pace over the rest of the year. The small rise in consumer sentiment in August was driven by improving expectations for the economy. However, there are signs that the softening of the labor market is causing spending by more vulnerable consumers to slow.

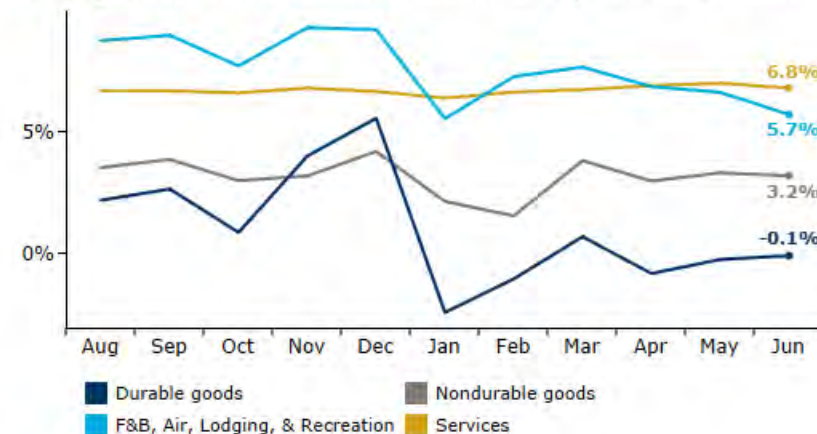
Concerns that downward revisions to job growth and a rising unemployment rate are the beginning of something much worse are misplaced. Seasonal factors and a surge in labor supply are driving unemployment higher, while layoffs remain low.

Shelter inflation remains sticky, but disinflation has resumed in other services prices while goods prices continue to decline, keeping inflation easing steadily toward 2%. Meanwhile, a weaker decline in transportation prices helped TPI inflation rise slightly in July to 0.6% year-over-year from 0.4% the month prior.

Real income growth is moderating as both pay and job growth slows but should remain strong enough to support spending. The solid state of households' balance sheets, with households carrying less debt than pre-pandemic while wealth has risen sharply, continues to underpin spending, particularly among higher-income households. The ongoing resilience of consumer spending should ease recession fears and lower interest rates should boost spending next year.

## Consumer Spending

% change relative to same month vs. Previous Year, prior 12-month trend



Source: BEA

## Consumer Confidence & Sentiment Index

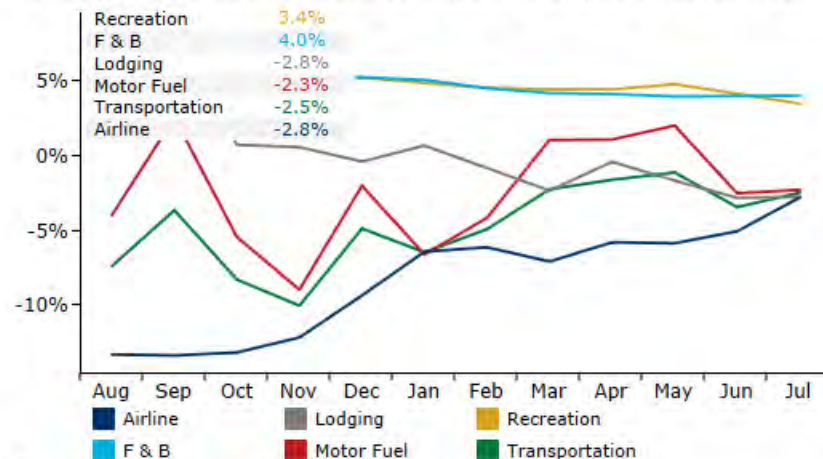
Index, 1985=100, prior 5-years



Source: Conference Board and University of Michigan

## Travel Price Index, Major Components

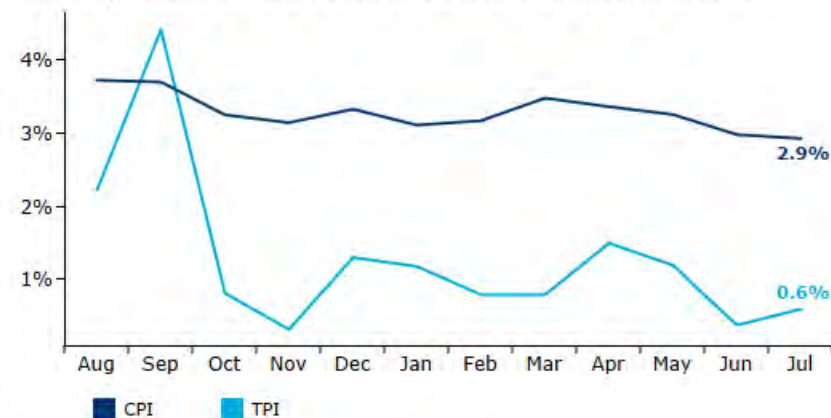
% change relative to same month vs. Previous Year, prior 12-month trend



Source: Tourism Economics

## Travel (TPI) and Consumer (CPI) Price Indices

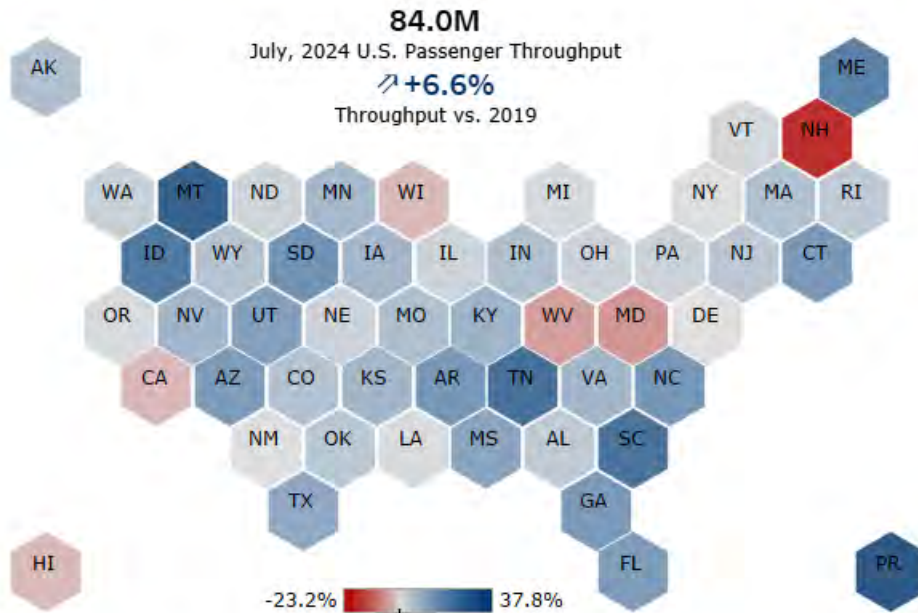
% change relative to same month vs. Previous Year, prior 12-months



Source: BLS (CPI); and Tourism Economics (TPI)

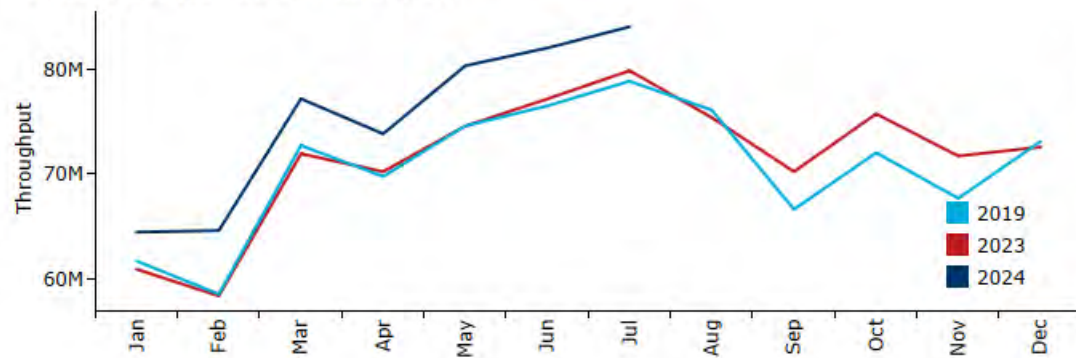
## July, 2024 Passenger Throughput by State

All passengers (domestic + international), % change vs. 2019



## U.S. Monthly Passenger Throughput

All passengers (domestic + international)



## Passenger Throughput Trend Comparison

All passengers (domestic + international), Index (2019=100)

State/Territory Name  
Multiple values

	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24
Arizona	110	110	117	119	116	108	120	122	115	122	123	118	116
California	92	90	95	97	97	91	97	98	96	93	97	96	96
Colorado	100	98	104	106	106	98	113	112	107	110	107	107	106
Hawaii	98	89	95	96	97	92	103	104	99	99	94	95	96
Illinois	95	93	98	98	98	93	102	100	96	97	102	102	103
Indiana	100	100	109	109	106	98	114	114	108	112	110	112	107
Kentucky	106	99	109	106	109	102	112	115	108	112	113	110	110
Massachusetts	98	97	101	104	103	94	107	104	101	102	104	105	107
Michigan	96	96	101	98	102	92	103	107	97	102	102	105	101
Minnesota	97	96	100	100	102	93	105	107	100	105	106	107	109
Missouri	103	100	104	102	105	97	103	108	103	107	106	107	107
Montana	118	120	132	130	125	108	134	133	126	125	131	139	134
Nevada	107	104	106	116	107	109	112	117	111	111	112	110	110
New Jersey	102	104	106	105	108	99	111	114	109	106	108	105	105
New York	91	91	92	96	101	95	102	102	101	96	95	99	101
North Carolina	108	103	111	110	110	103	121	120	121	112	118	117	117
Oregon	94	93	97	100	102	91	96	102	97	101	101	102	101
Pennsylvania	93	93	98	96	98	90	102	104	104	99	102	104	103
Puerto Rico	129	138	128	130	129	115	129	136	126	128	141	141	138
South Dakota	107	109	113	112	117	104	131	132	129	127	119	121	119
Texas	108	108	115	114	116	108	122	119	116	120	120	116	112
Virginia	107	103	111	107	109	101	113	114	112	105	110	107	109
Washington	99	97	101	101	103	91	103	107	99	100	102	104	103
United States	101	99	105	105	106	99	104	110	106	106	108	107	107

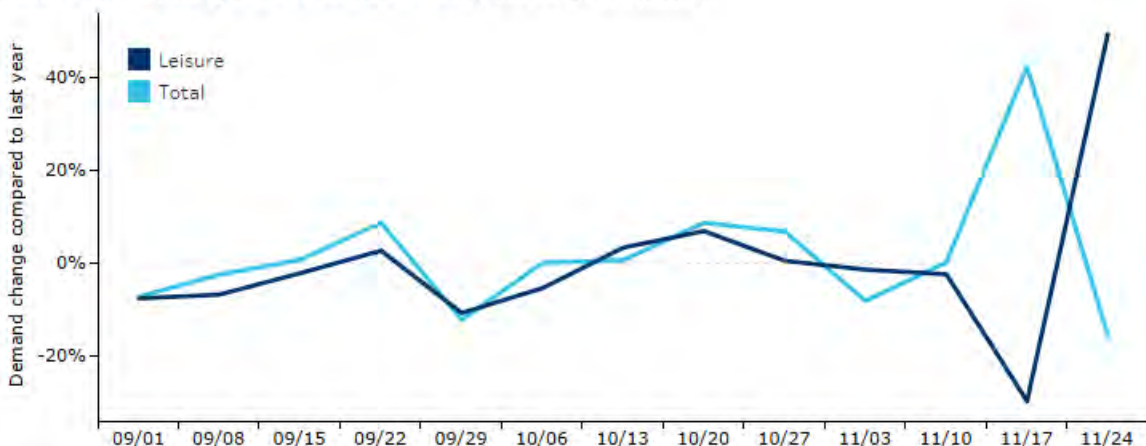
89 141

# Domestic Leisure Travel

July, 2024

## U.S. Hotel Leisure Demand Pace

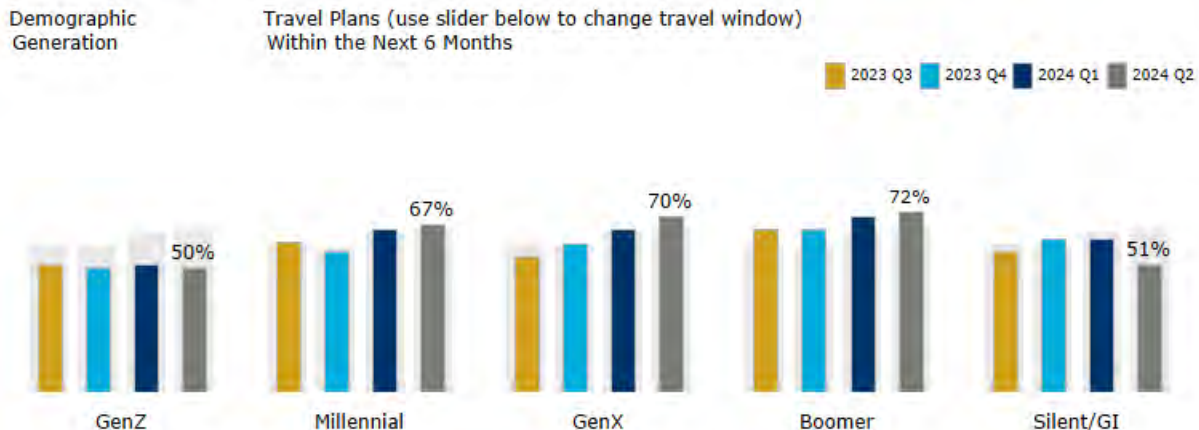
Leisure hotel booking pace vs same time last year, as of 8/15/2024



Source: Amadeus

## Planning Leisure Travel Within the Next 6 Months

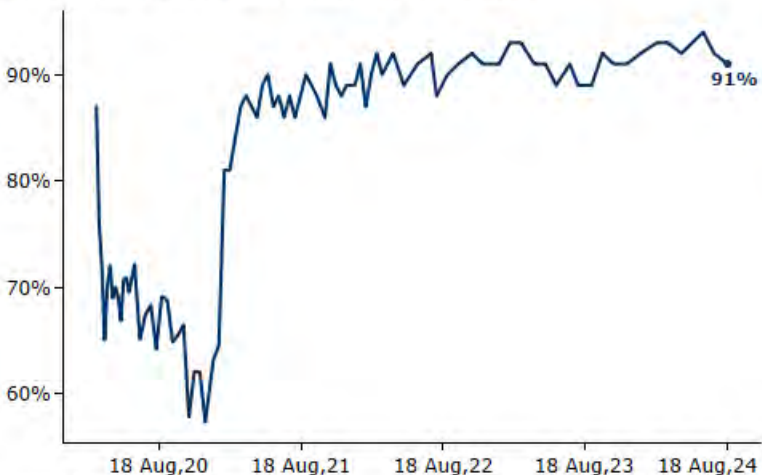
% of American Travelers



Source: MMGY Global's Portrait of American Travelers (released Q1 2024)

## Consumer Travel Sentiment

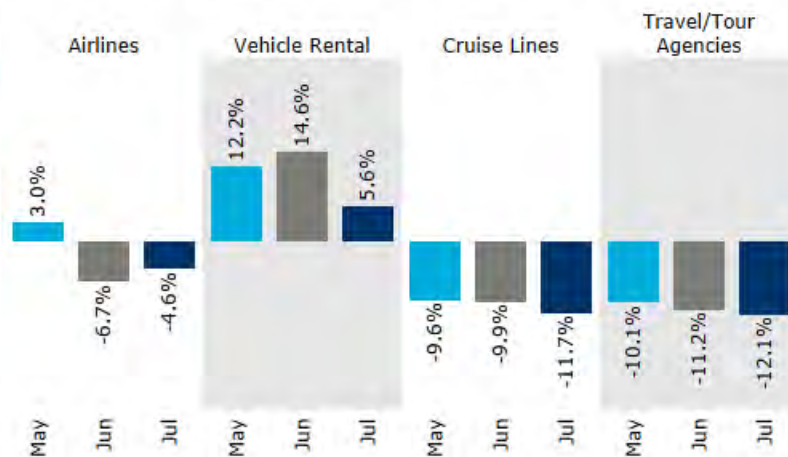
Travelers with Travel Plans in the Next Six Months



Source: Longwoods International

## US Consumer Credit Card Spend

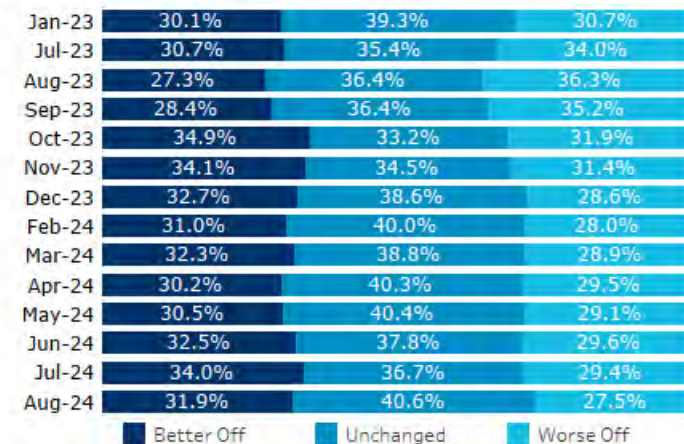
3-month trend, % change YOY (Mar 2024-May 2024)



Source: TransUnion

## Consumer Travel Sentiment

Are you worse or better off financially than you were a year ago?



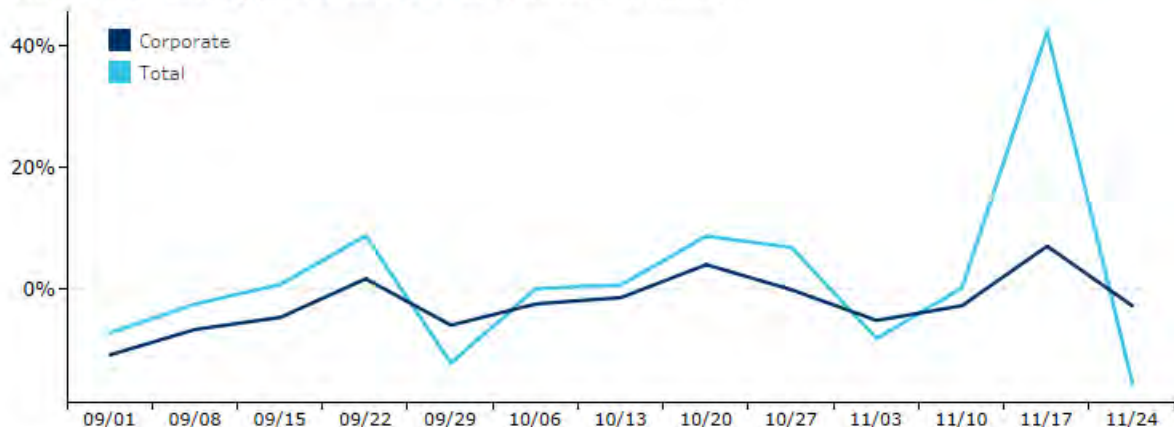
Source: Future Partners

# Domestic Business Travel

July, 2024

## U.S. Hotel Business Demand Pace

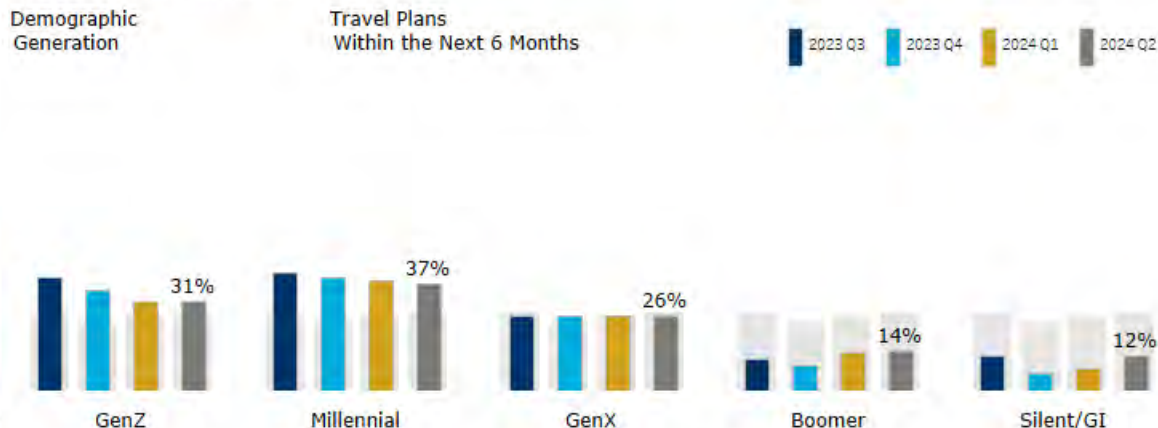
Business hotel booking pace vs same time last year, as of 8/15/2024



Source: Amadeus

## Planning Business Travel Within the Next 6 Months

% of American Consumers



Source: MMGY Global's Portrait of American Travelers (released Q1 2024)

## Business-related Overnight Trips

How many overnight business trips have you taken the past month?



Source: Future Partners

## Business-related Overnight Trips

Percent of all travelers that have taken an overnight business trip in the past month



Source: Future Partners

# Domestic Group Travel

July, 2024

## Insights

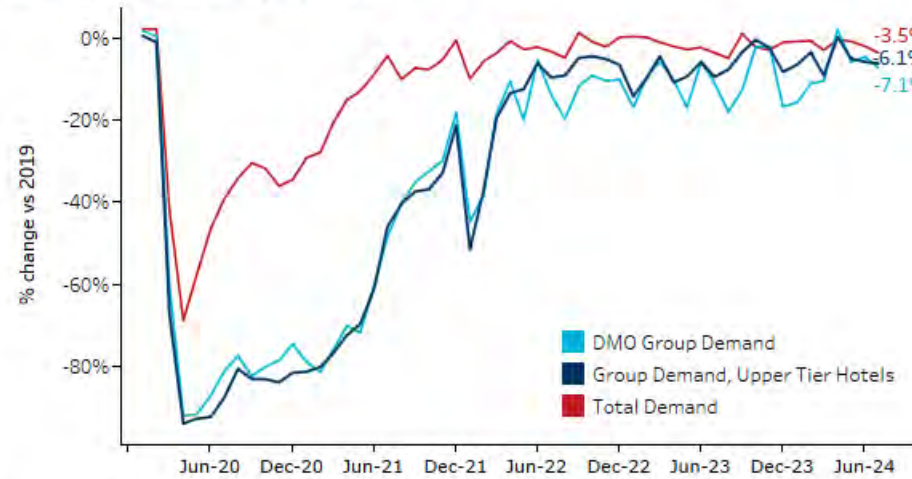
DMO group demand in July slipped to 7% below 2019 levels, compared to 4% below 2019 levels in June.

DMO/CVB pace for room nights on the books as of August 2024 improved from the July readings for the final quarter of 2024.

Fewer meeting planners were less optimistic about the outlook for recovery in July (11%) than in May (15%).

## Total U.S. Hotel Demand vs Group Demand

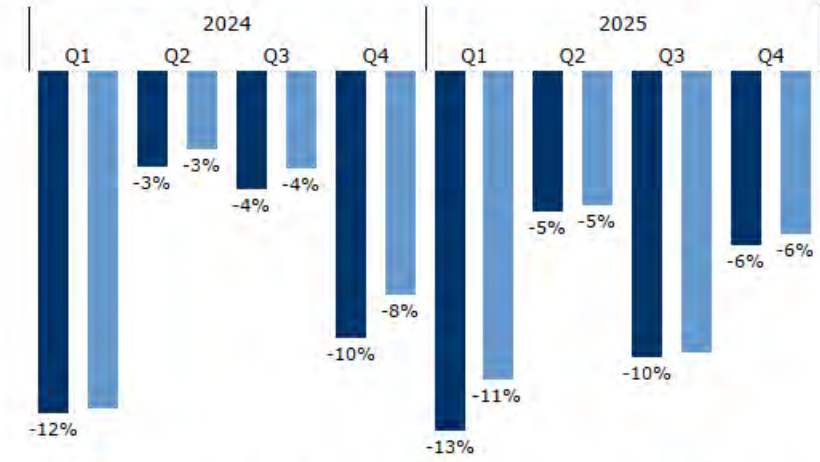
Group demand, % change vs 2019



Source: STR (total demand and top-tier group demand), Simpleview CRM (250+ U.S. DMOs)

## DMO/CVB Room Nights on the Books

Pace for future dates, relative to the same period in 2019

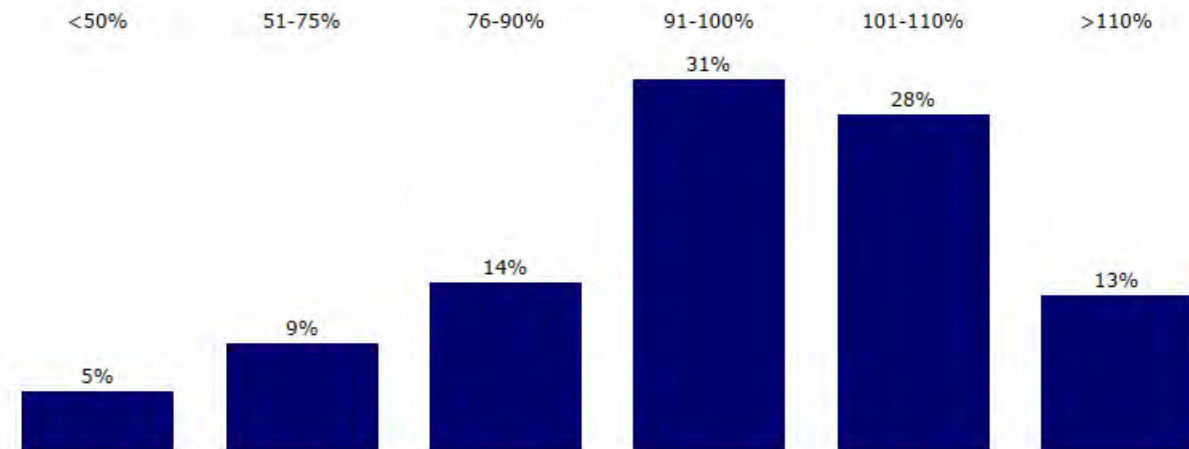


Source: Simpleview CRM (250+ U.S. DMOs)

As of Date  
 Jul 8, 2024  
 Aug 5, 2024

## Value of Face-to-Face Meetings

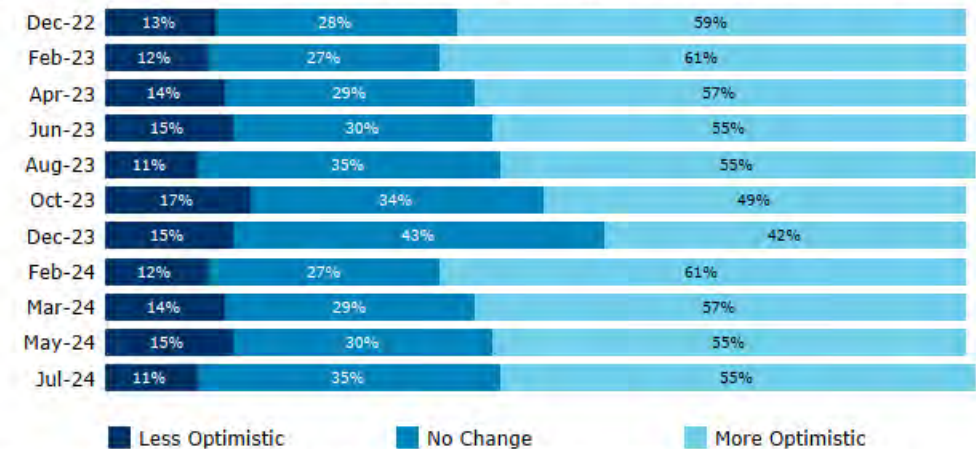
How many in-person attendees do you expect in this year vs prior year results?



Source: Northstar Meetings Group and Cvent (Meetings industry PULSE survey), as of May 2024

## Meeting Planner Outlook

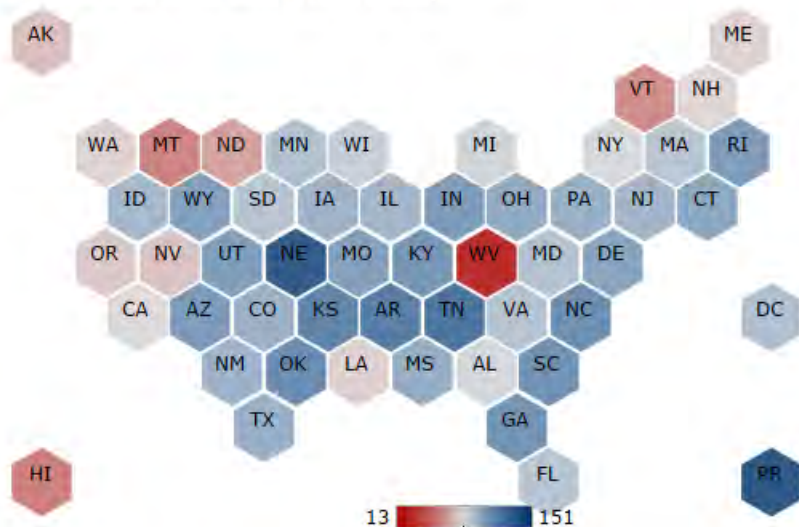
How the outlook for recovery has changed among meeting planners the past six weeks



Source: Northstar Meetings Group and Cvent (Meetings industry PULSE survey), as of July 2024

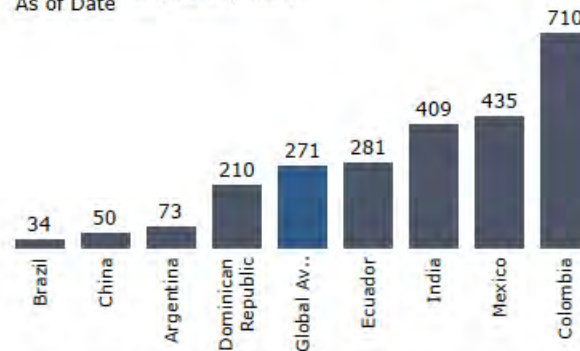
## Overseas Arrivals to U.S. by State (+PR)

Visitor arrivals for July, 2024, Index (2019 = 100)



## Visa Interview Wait Times, Avg. Days

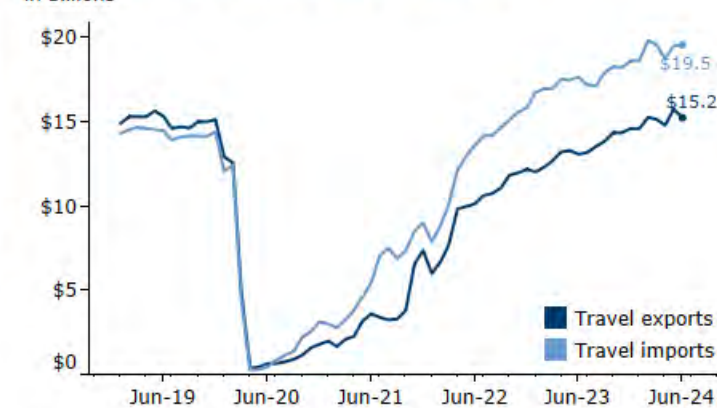
As of Date August 27, 2024



Top-8 inbound markets for tourist visa required countries. Weighted average by 2019 consulate visa issuance. Global Average includes China. Source: Tourism Economics

## Nominal US Export and Imports

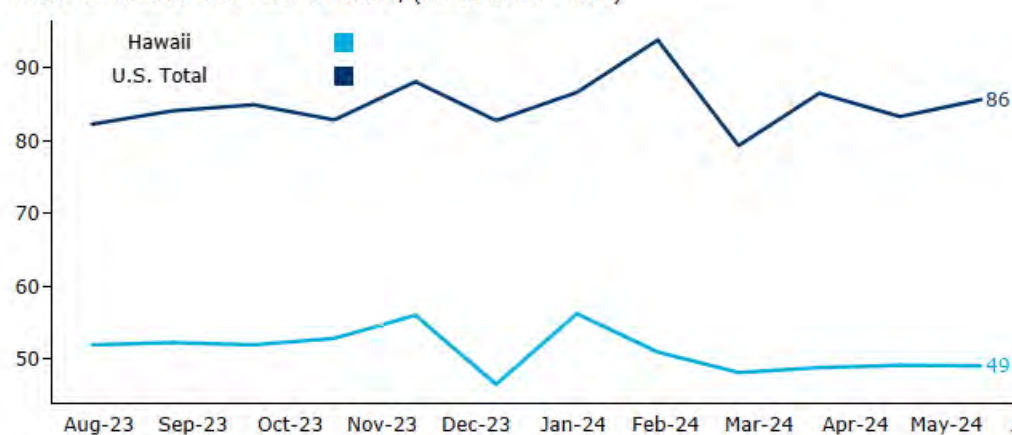
in billions



Source: NTTO

## Overseas Arrivals to U.S. Total & Hawaii

Visitor arrivals to U.S. Total & Hawaii, (Index 2019 = 100)



## International Arrivals to U.S. Total

Visitor arrivals to U.S. Total, (Index 2019 = 100)

	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24
Total Overseas	82	84	85	83	88	83	87	94	79	86	83	86
Brazil	83	94	96	83	89	79	89	78	85	95	85	91
Canada	90	90	104	99	91	106	106	101	96	102	95	
Canada (air)	111	107	113	105	101	113	111	108	109	116	104	
France	87	87	93	90	103	95	99	93	101	94	81	81
Germany	101	92	94	89	94	91	94	122	84	102	81	95
India	154	136	136	130	149	153	161	159	141	131	135	143
Mexico	89	86	84	81	78	97	92	85	79	88		
Mexico (air)	122	115	121	115	117	120	127	158	91	118	117	119
UK	85	81	84	84	91	89	84	98	73	80	75	84
China	47	48	50	58	58	45	50	60	54	53	52	55
Colombia	106	107	108	107	119	112	104	137	76	110	115	118
Dominican Republic	102	105	97	105	109	123	114	155	87	115	108	113

45 161

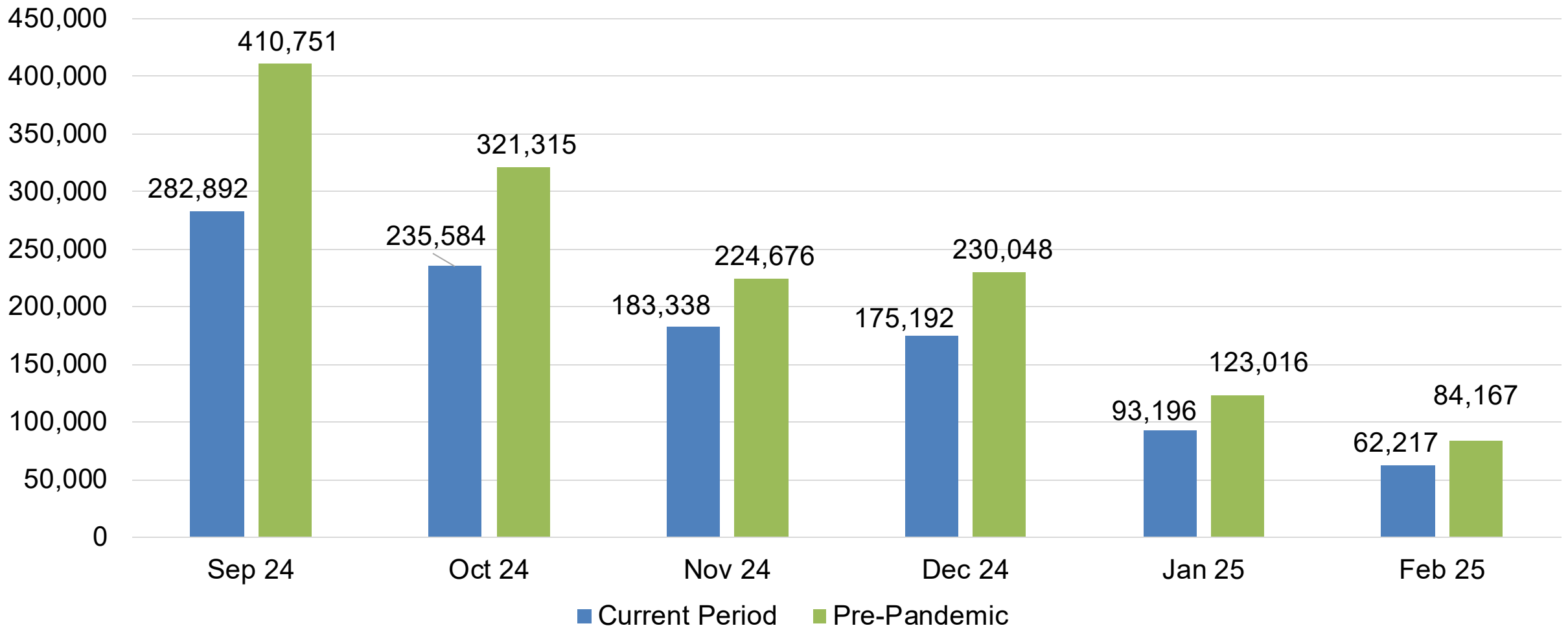
# ARC/FORWARDKEYS DESTINATION GATEWAY AIR BOOKING TRENDS



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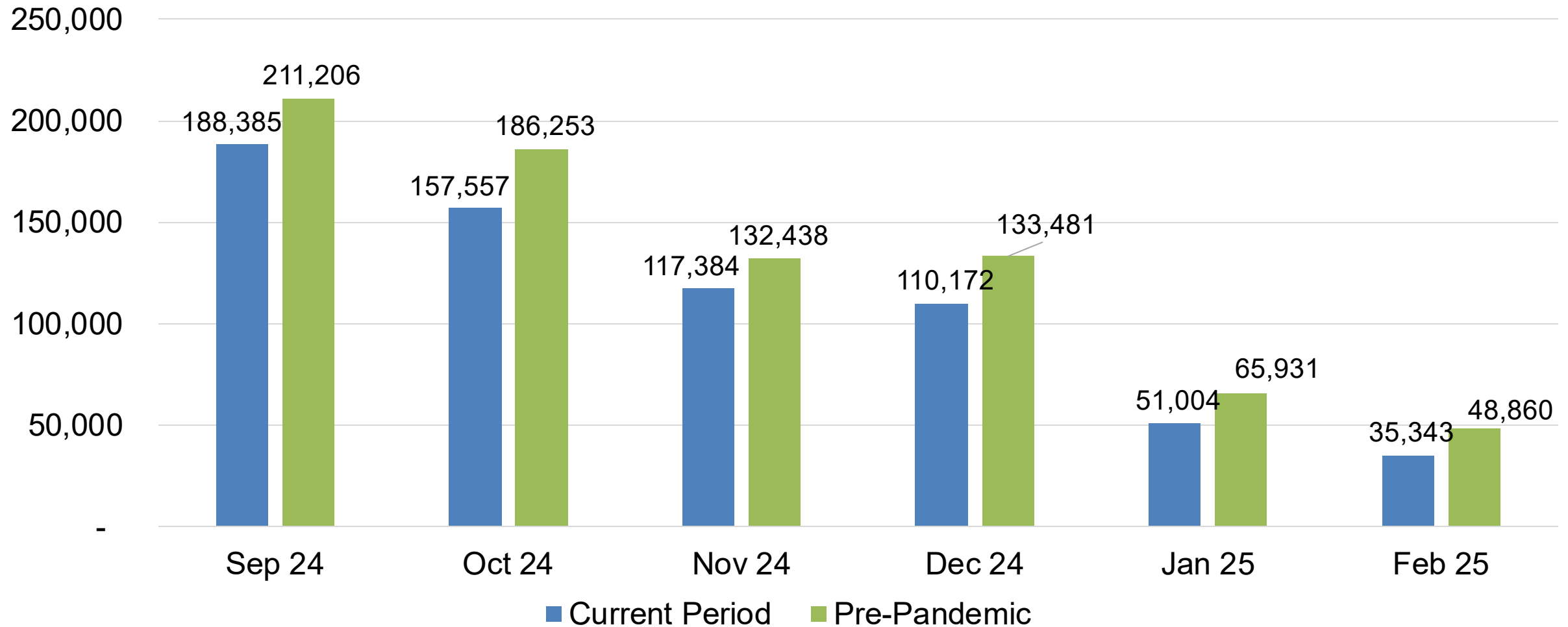
# Six Month Outlook: All Markets



Source: ARC/ForwardKeys Destination Gateway

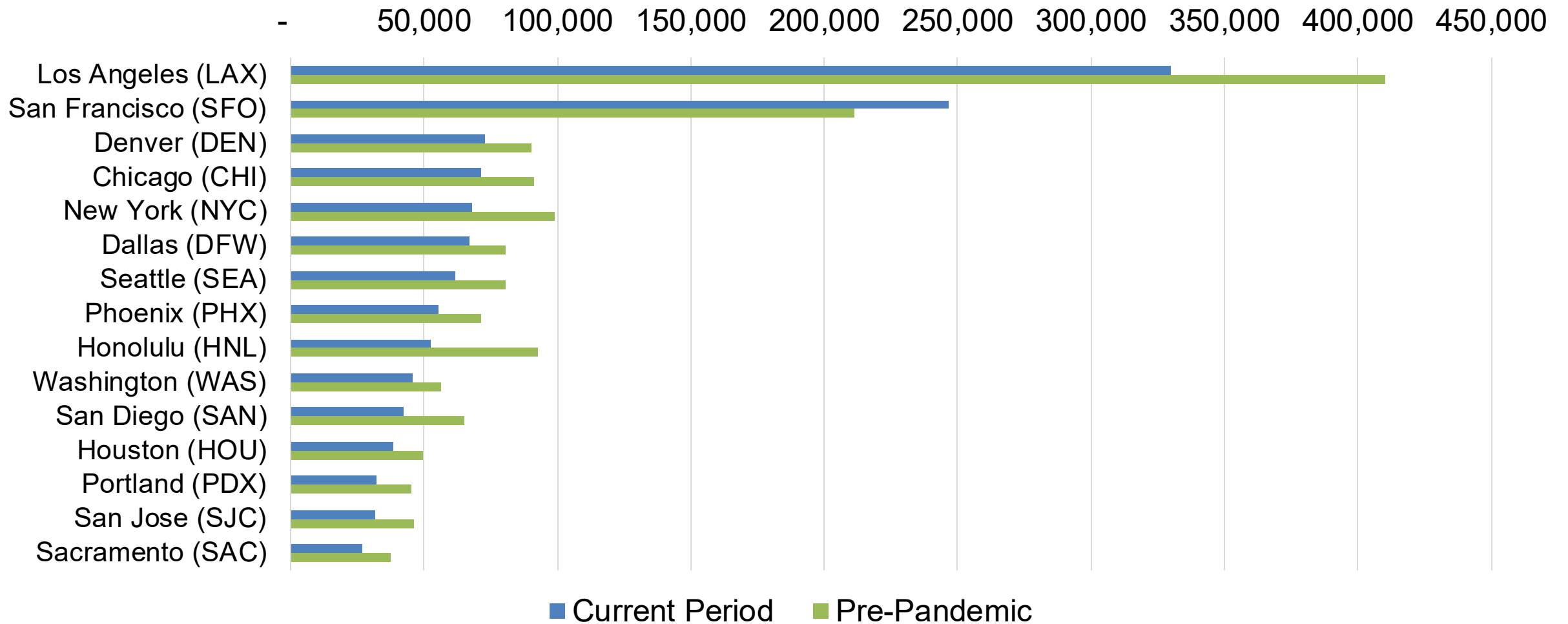


# Six Month Outlook: United States



Source: ARC/ForwardKeys Destination Gateway

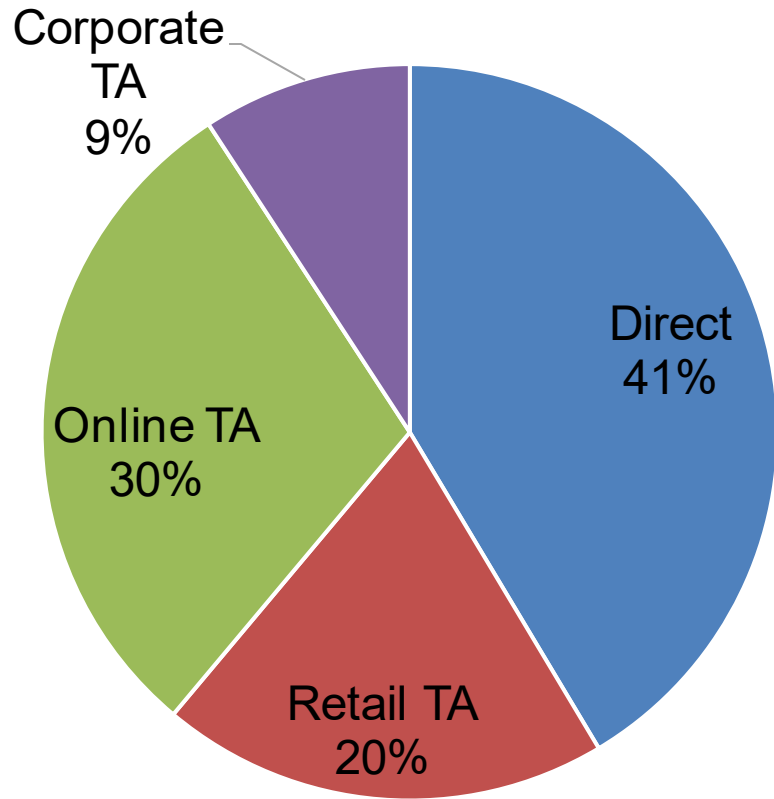
# Trip Origins: United States



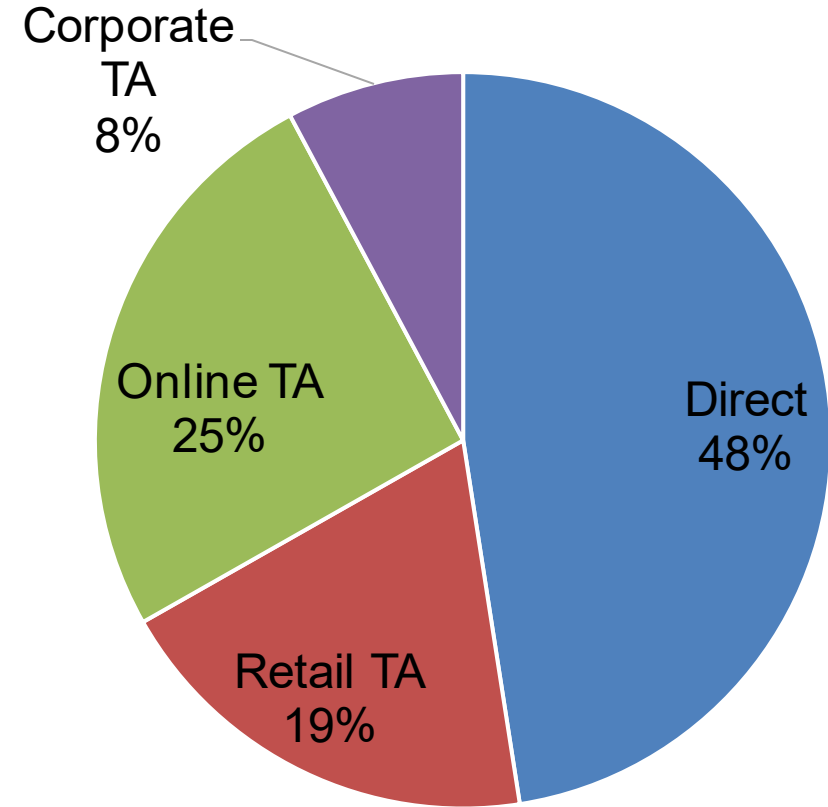
Source: ARC/ForwardKeys Destination Gateway

# Distribution Channel: United States

## Pre-Pandemic



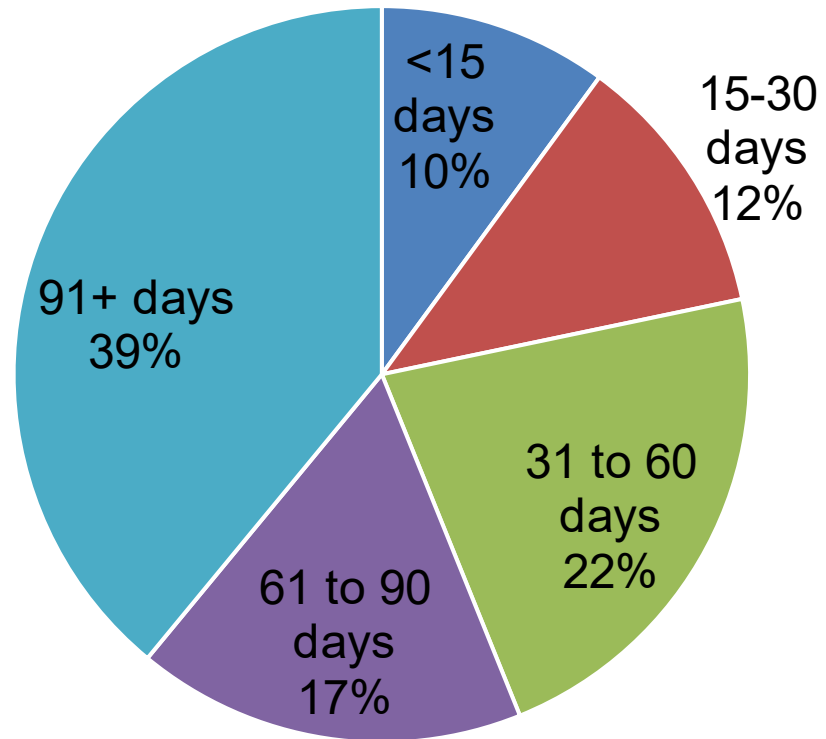
## Current Period



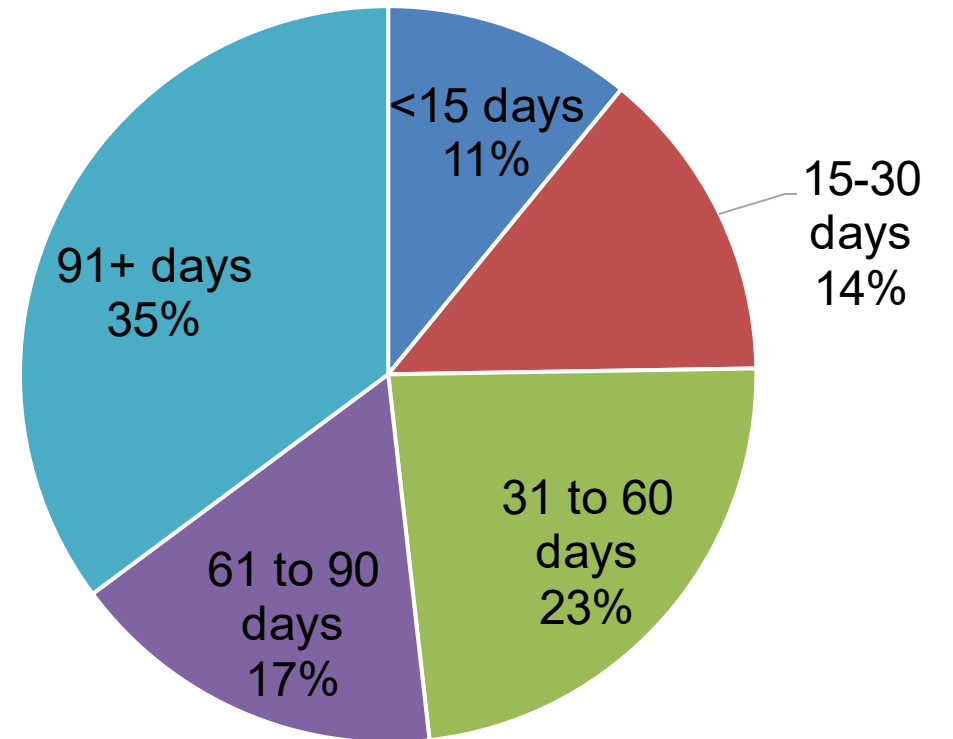
Source: ARC/ForwardKeys Destination Gateway

# Lead Time: United States

## Pre-Pandemic

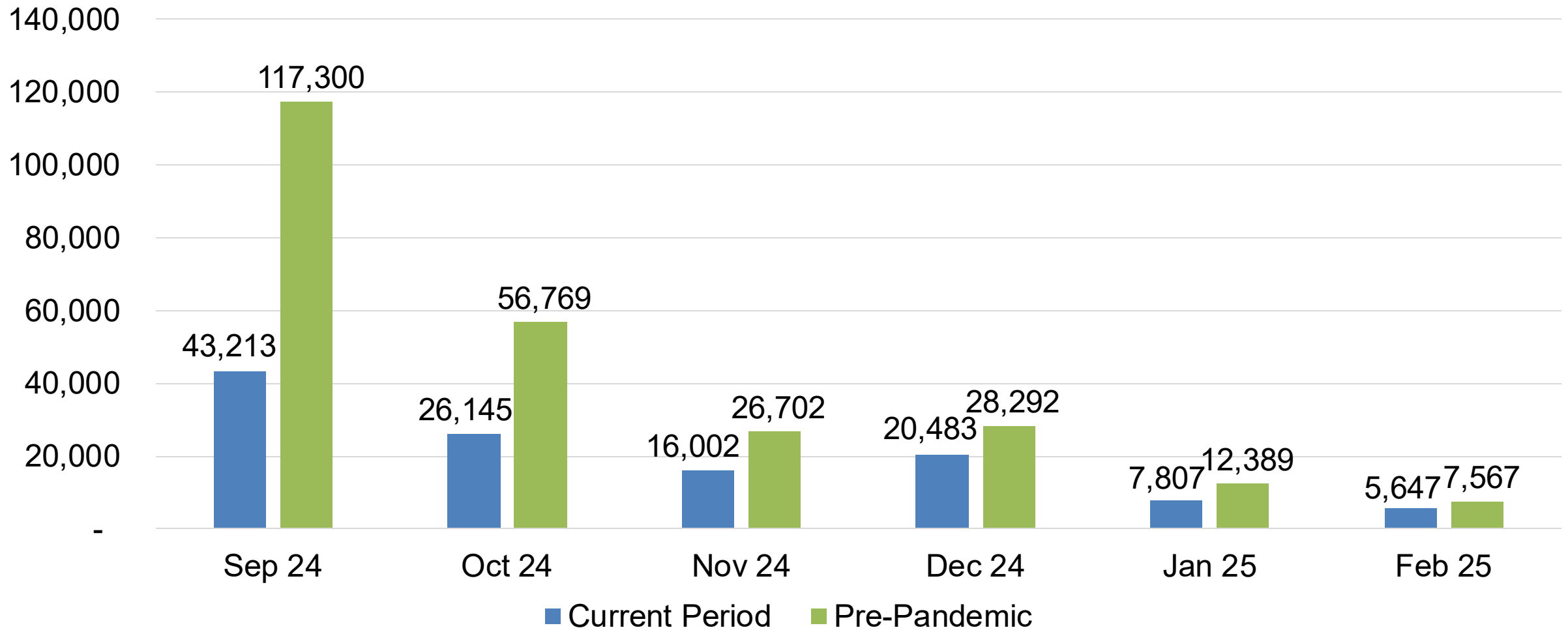


## Current Period



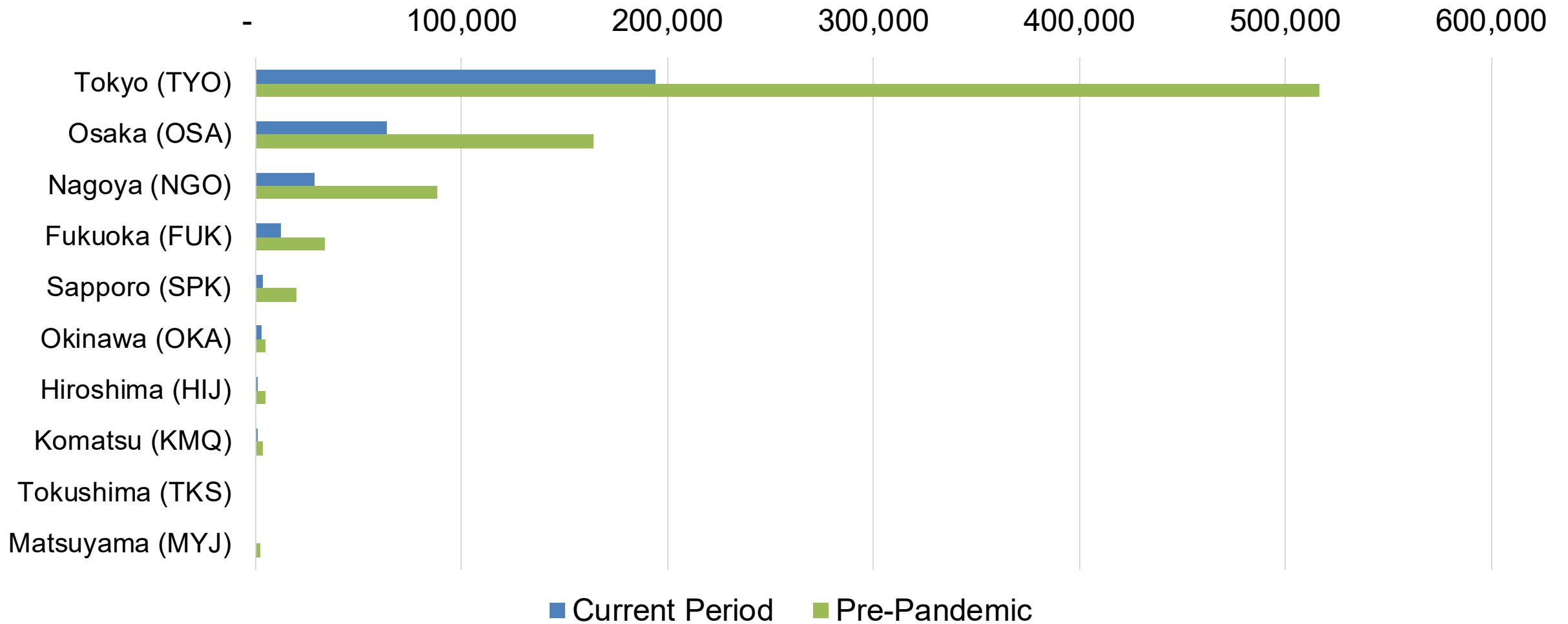
Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: Japan



Source: ARC/ForwardKeys Destination Gateway

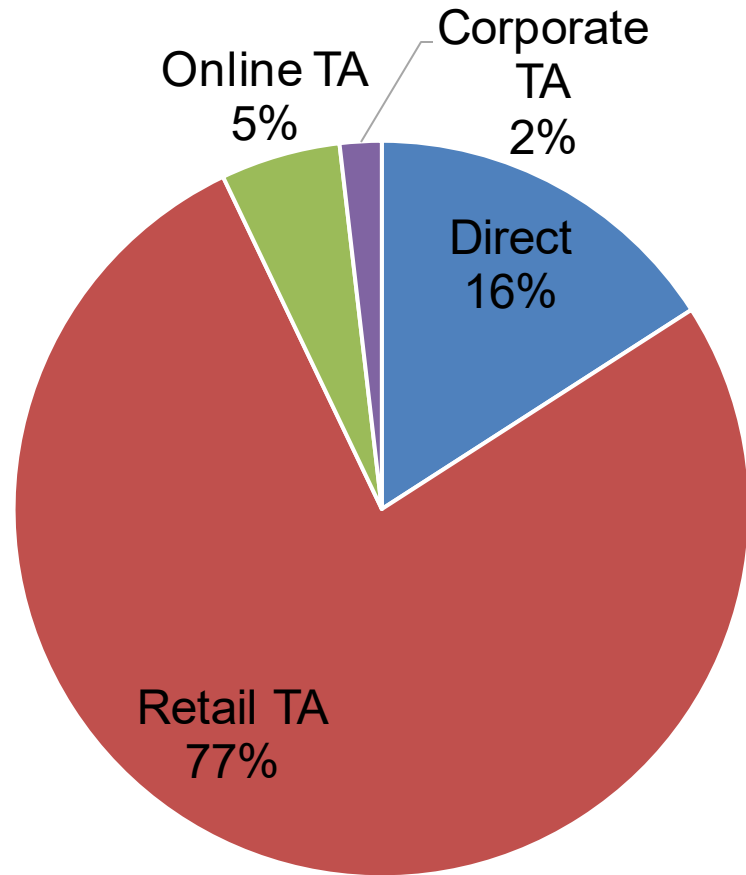
# Trip Origins: Japan



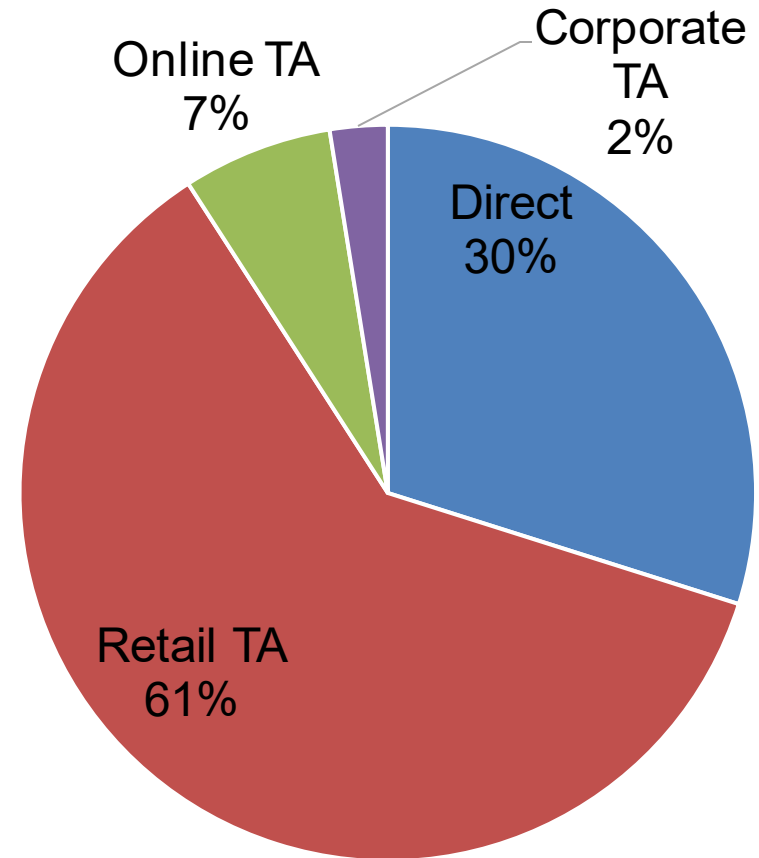
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# Distribution Channel: Japan

## Pre-Pandemic



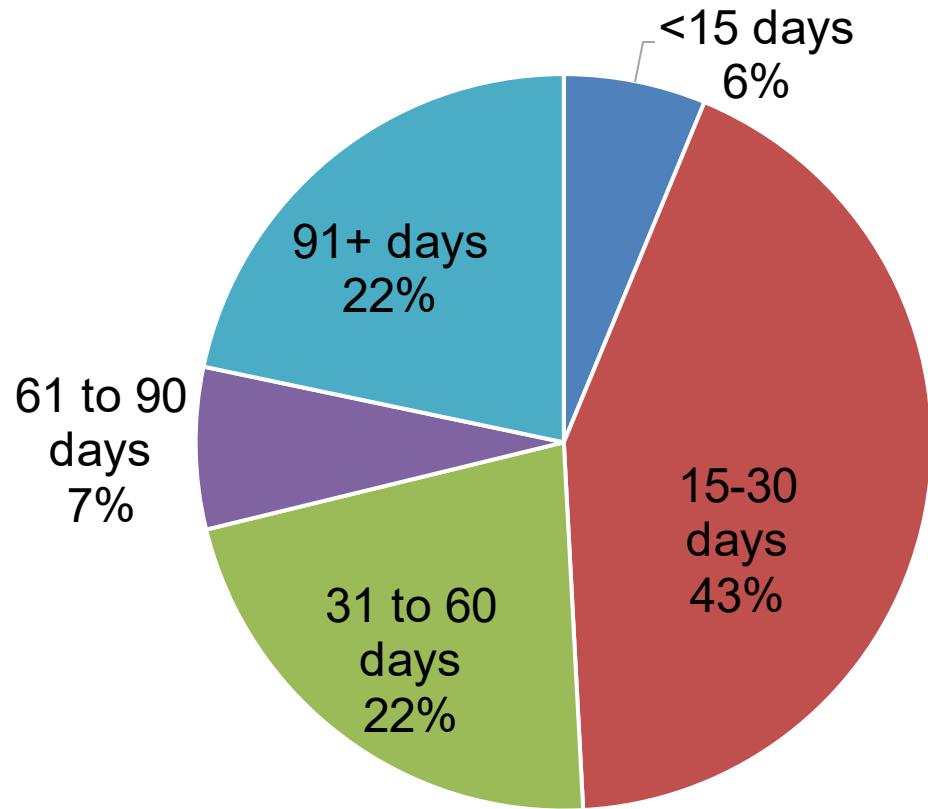
## Current Period



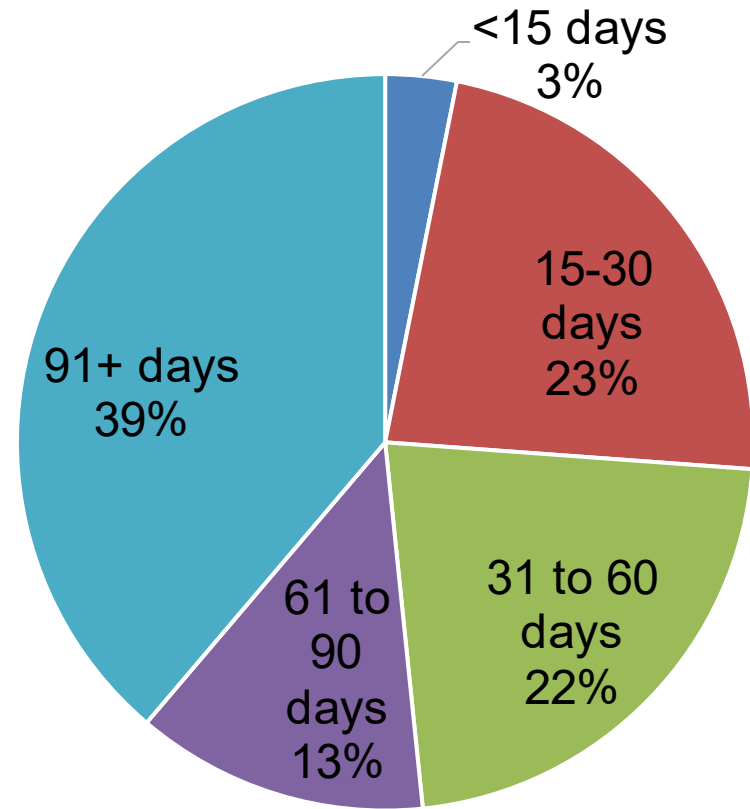
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# Lead Time: Japan

## Pre-Pandemic



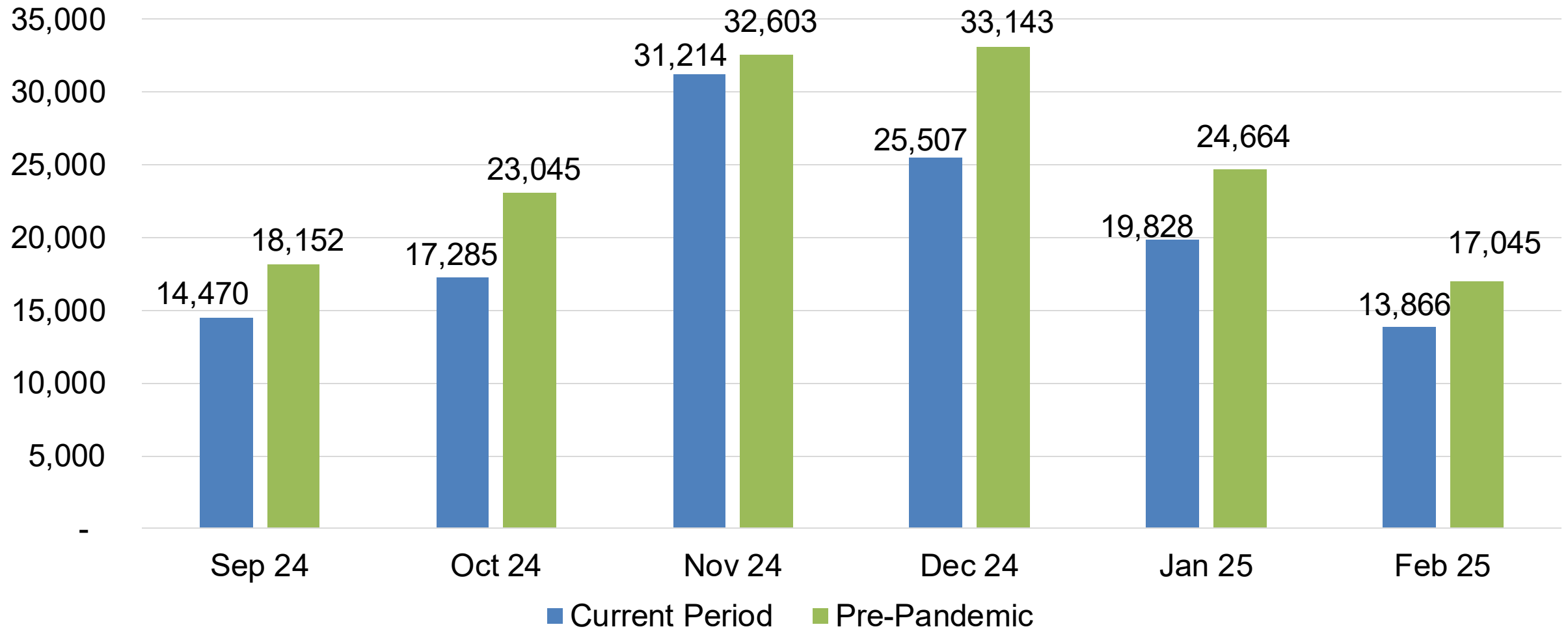
## Current Period



Source: ARC/ForwardKeys Destination Gateway

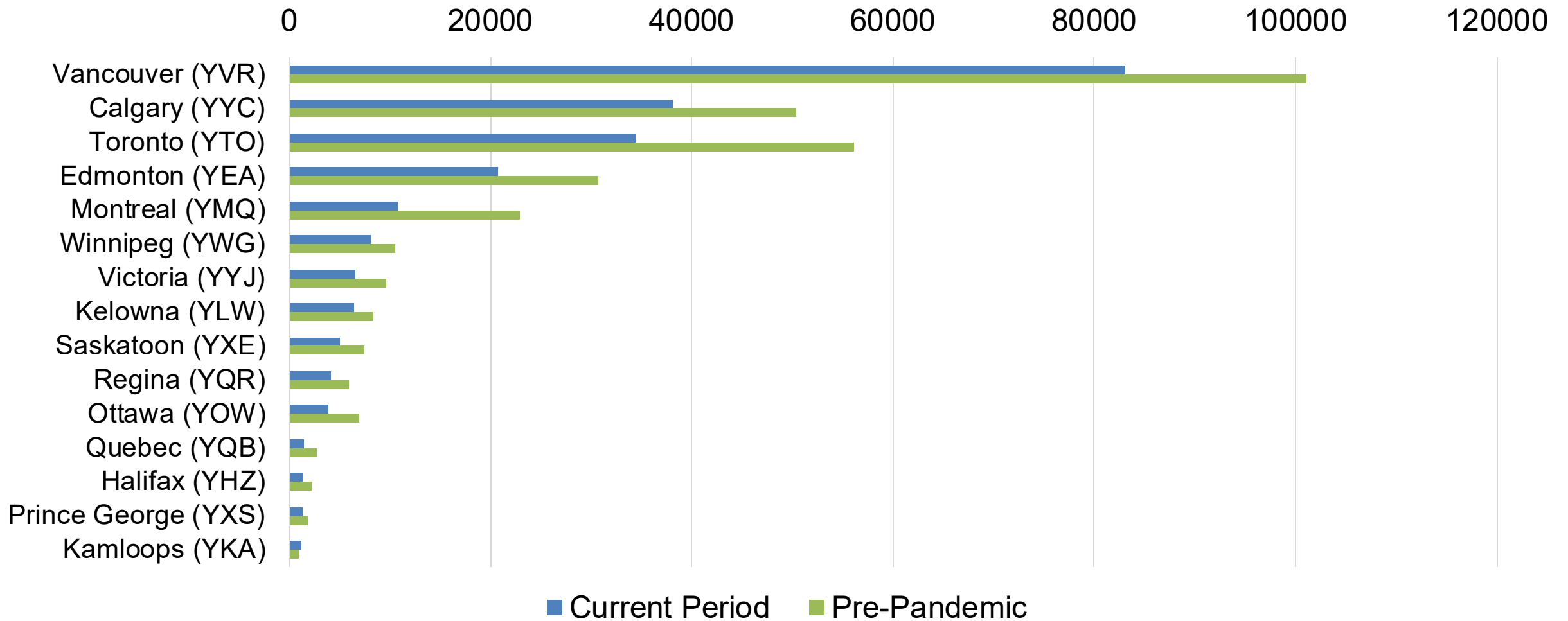


# Six Month Outlook: Canada



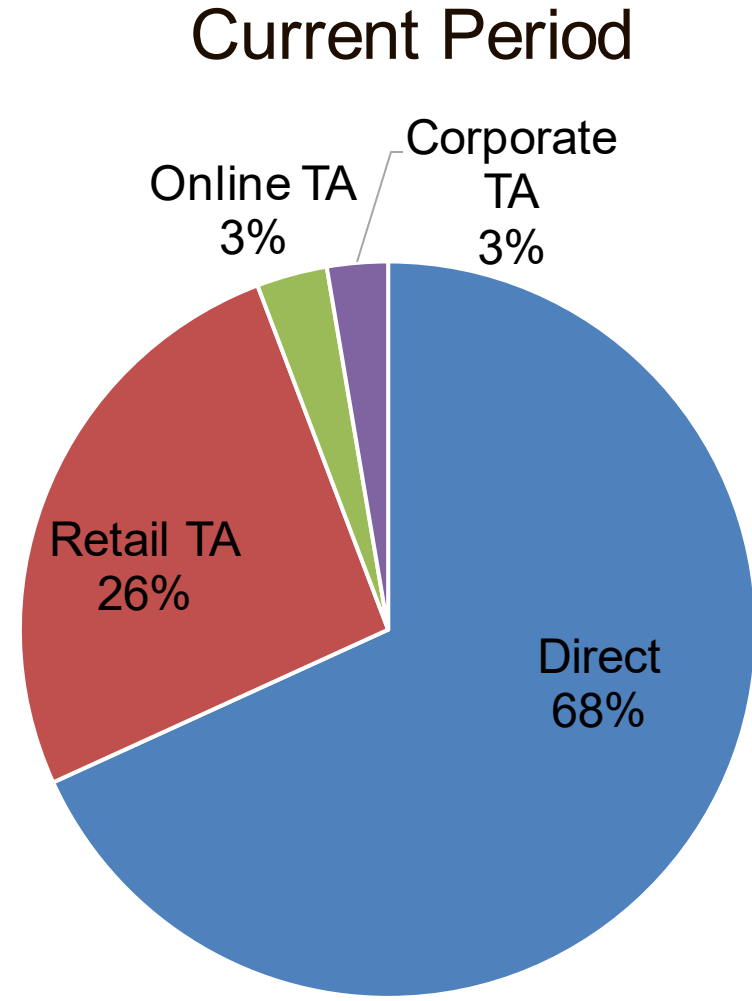
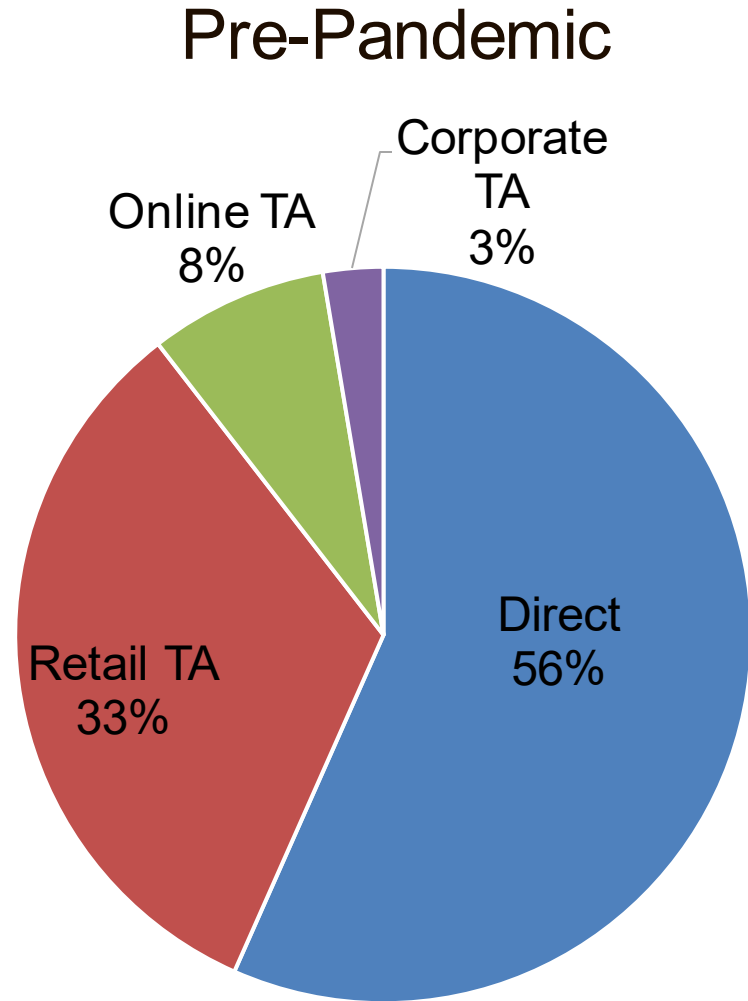
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# Trip Origins: Canada



Source: ARC/ForwardKeys Destination Gateway

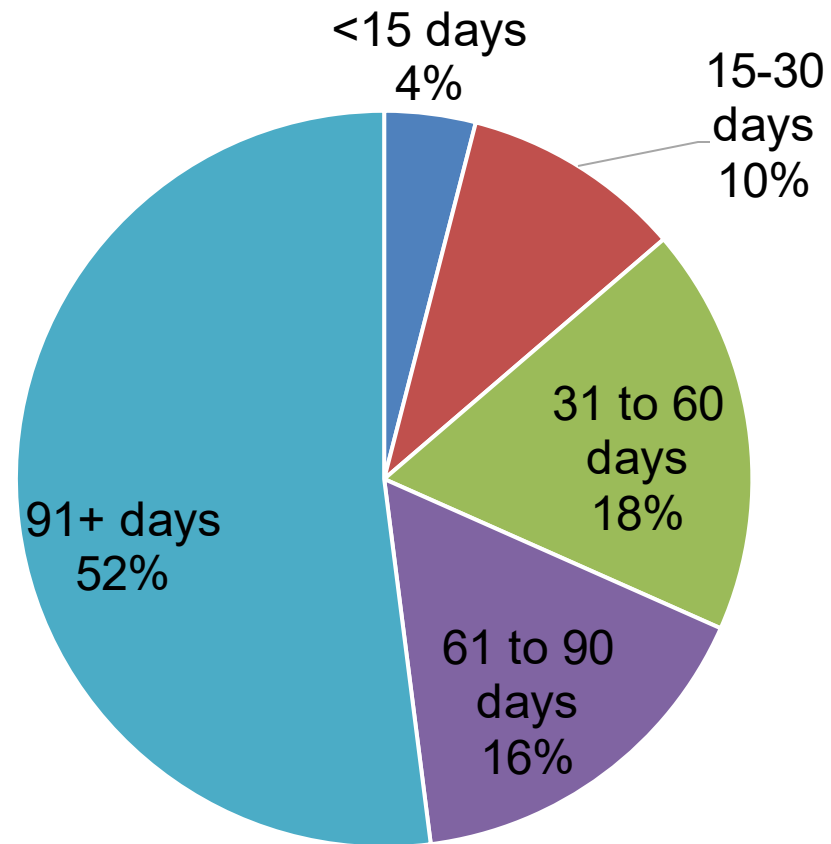
# Distribution Channel: Canada



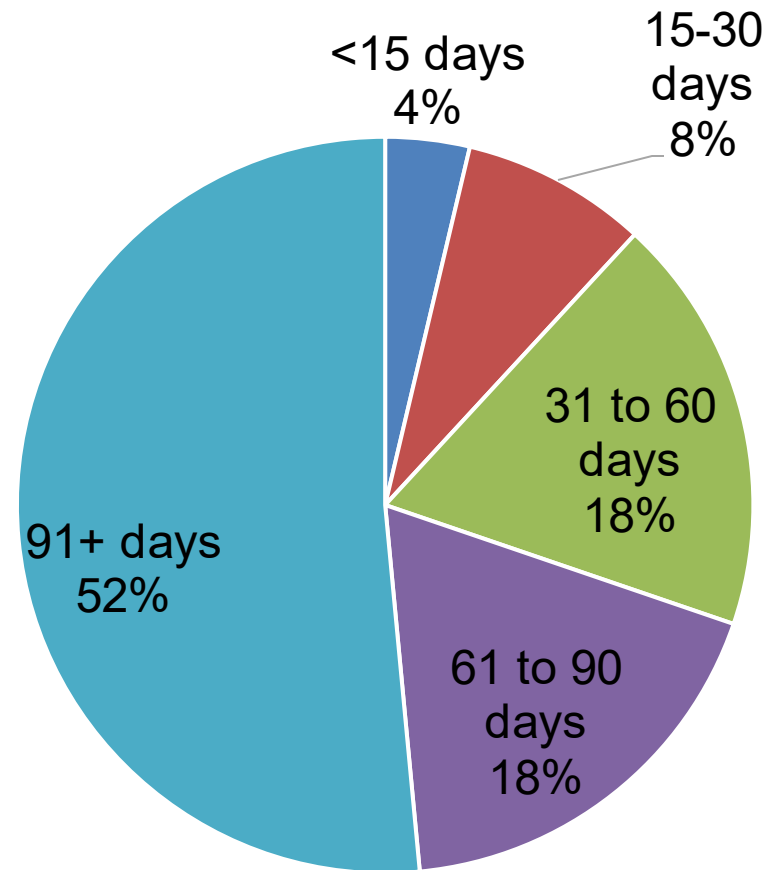
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# Lead Time: Canada

## Pre-Pandemic

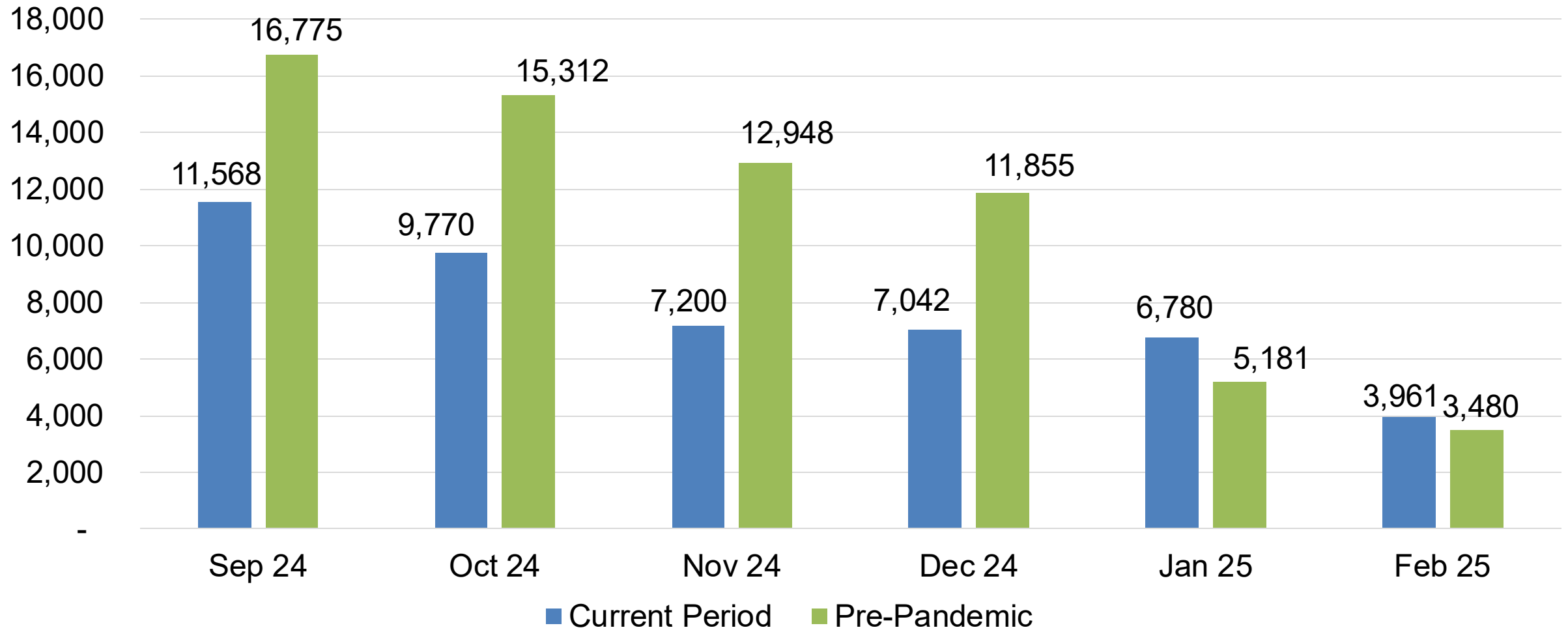


## Current Period



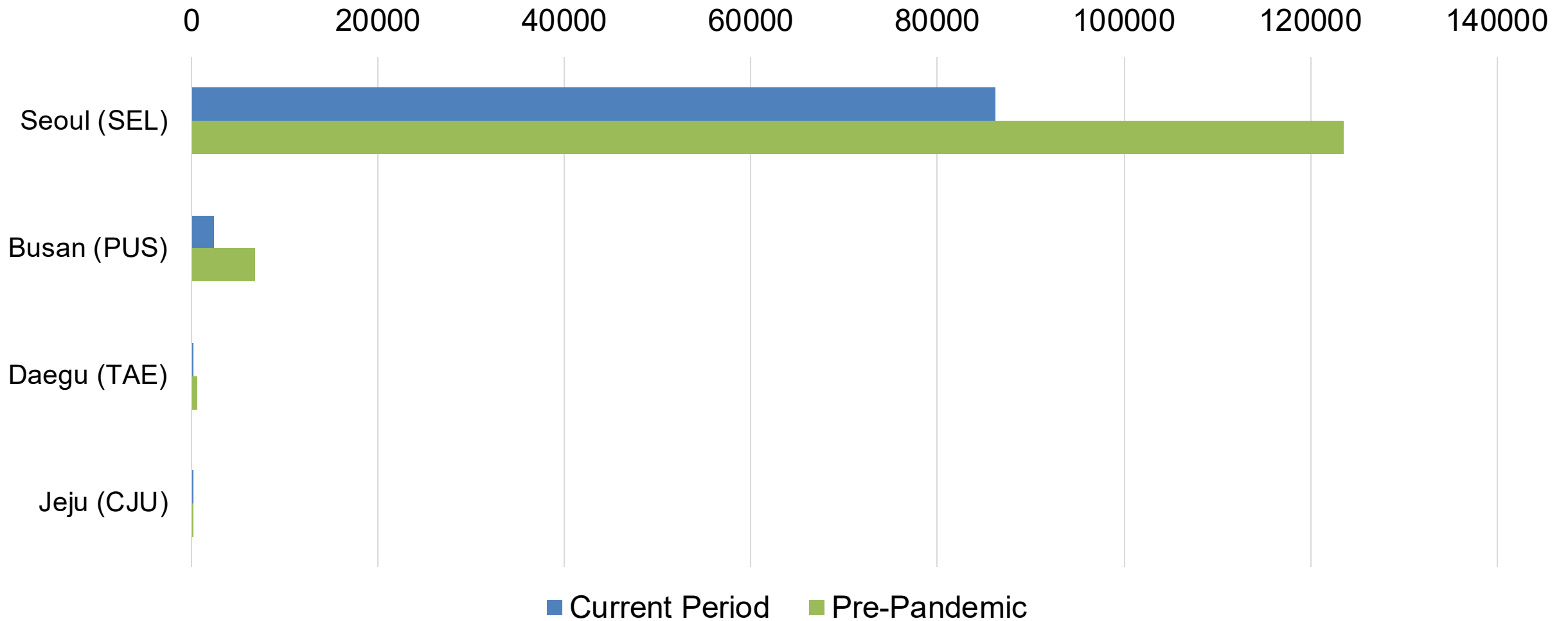
Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: Korea



Source: ARC/ForwardKeys Destination Gateway

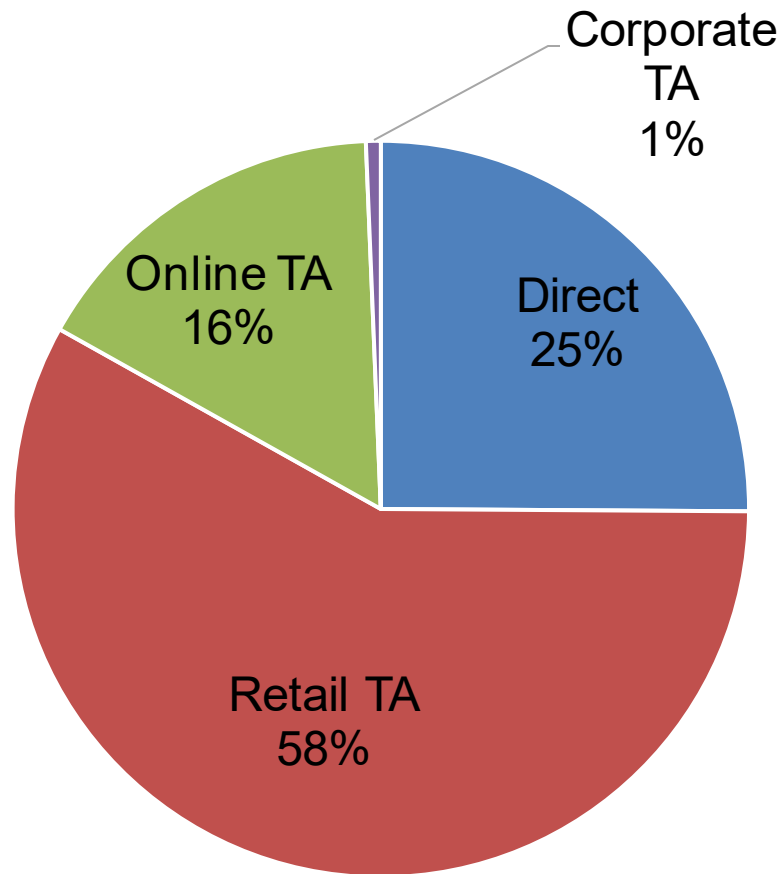
# Trip Origins: Korea



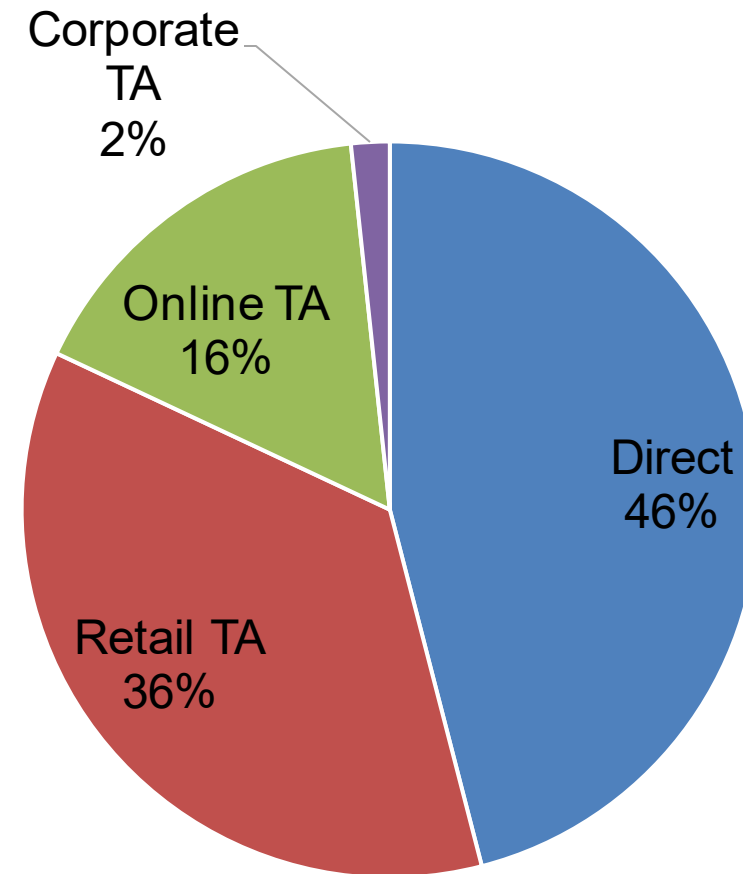
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# Distribution Channel: Korea

## Pre-Pandemic



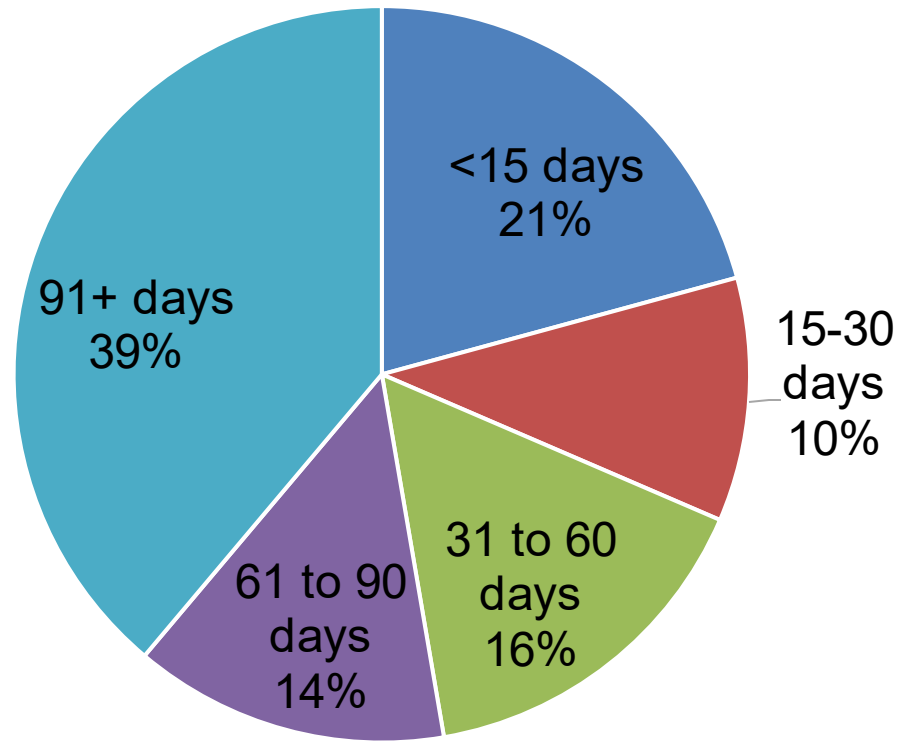
## Current Period



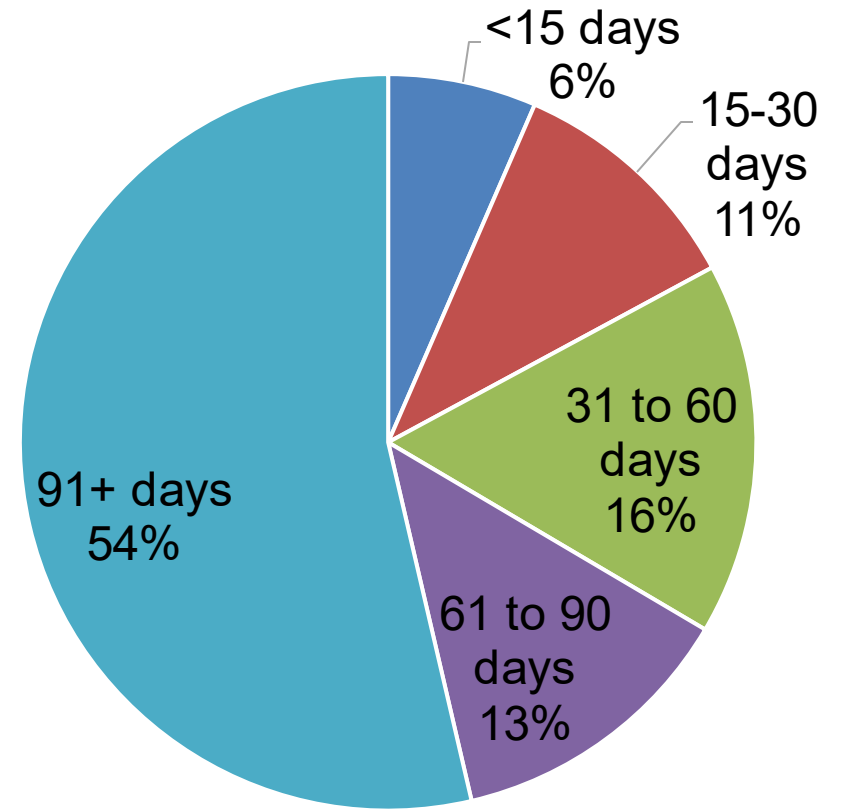
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# Lead Time: Korea

## Pre-Pandemic



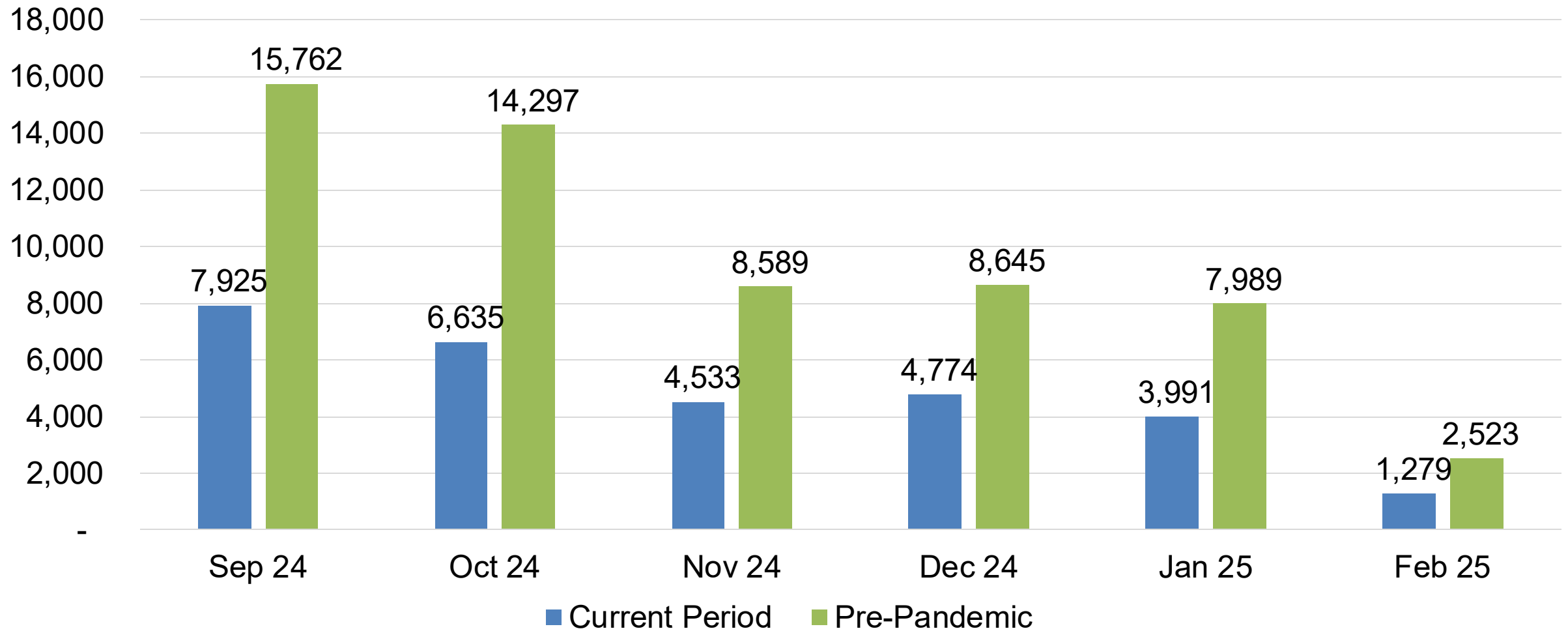
## Current Period



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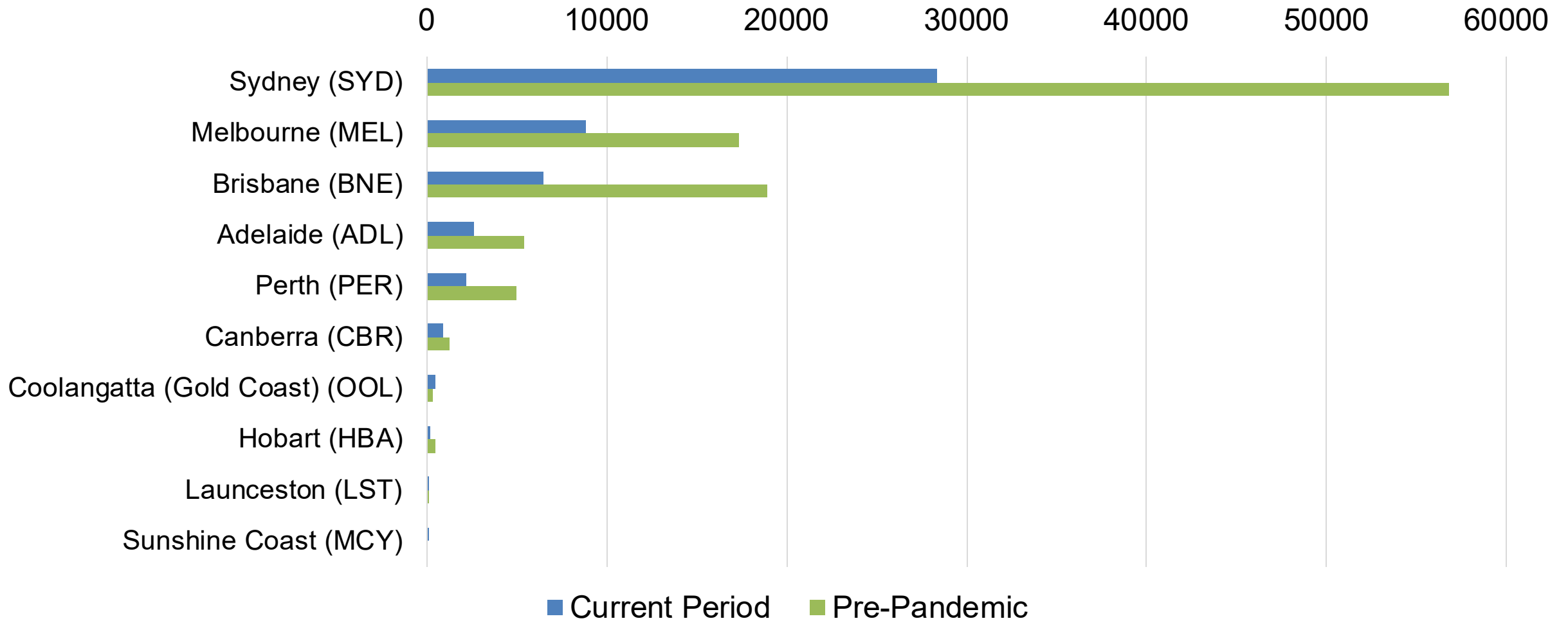


# Six Month Outlook: Australia



Source: ARC/ForwardKeys Destination Gateway

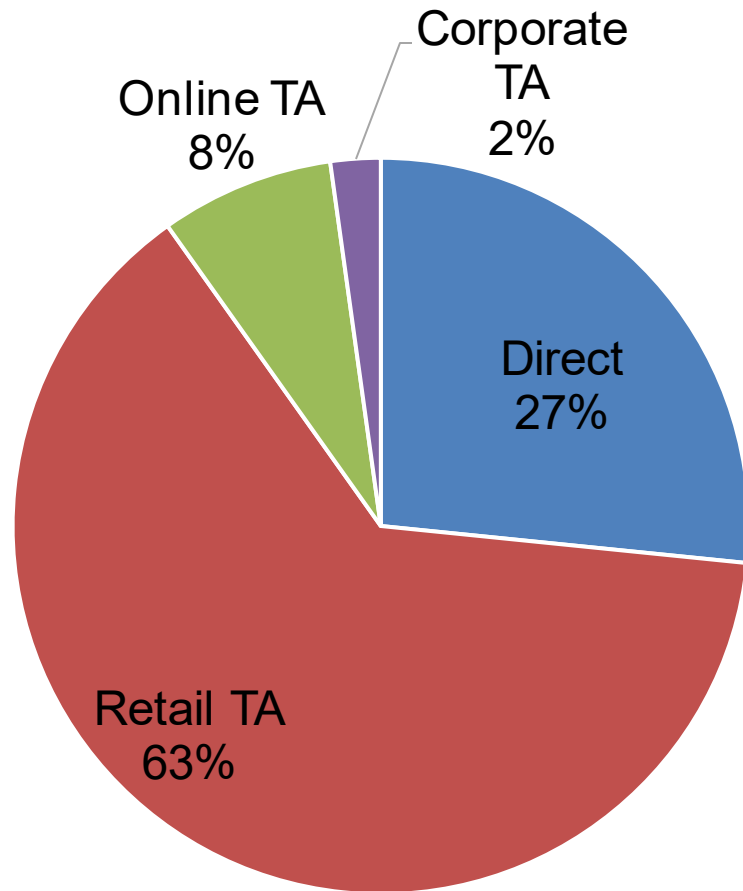
# Trip Origins: Australia



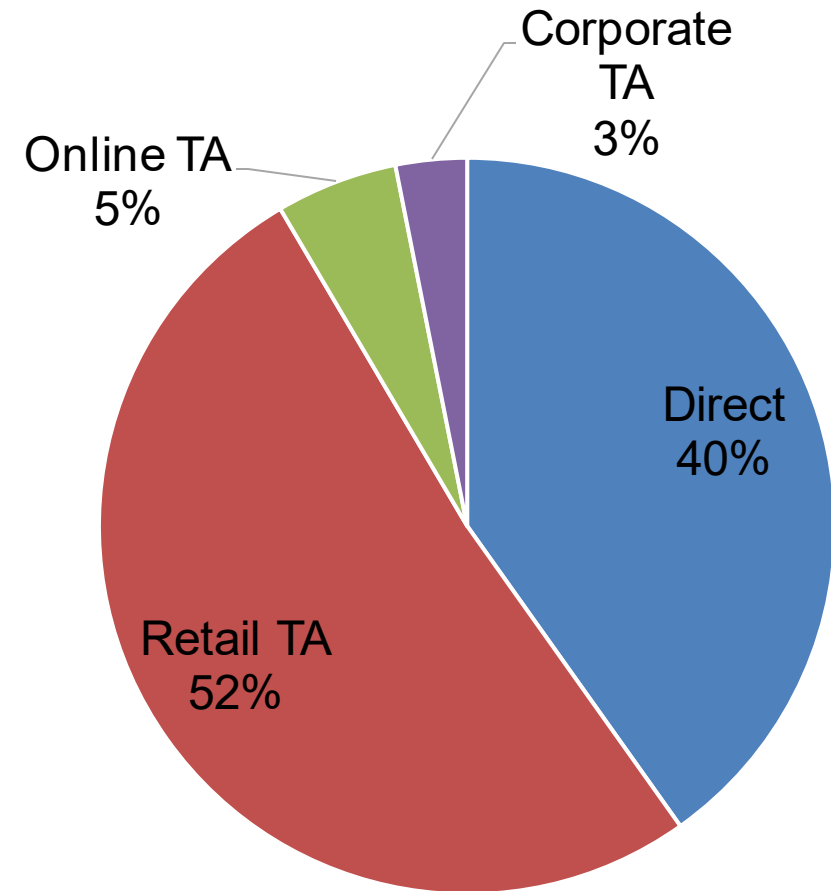
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# Distribution Channel: Australia

## Pre-Pandemic



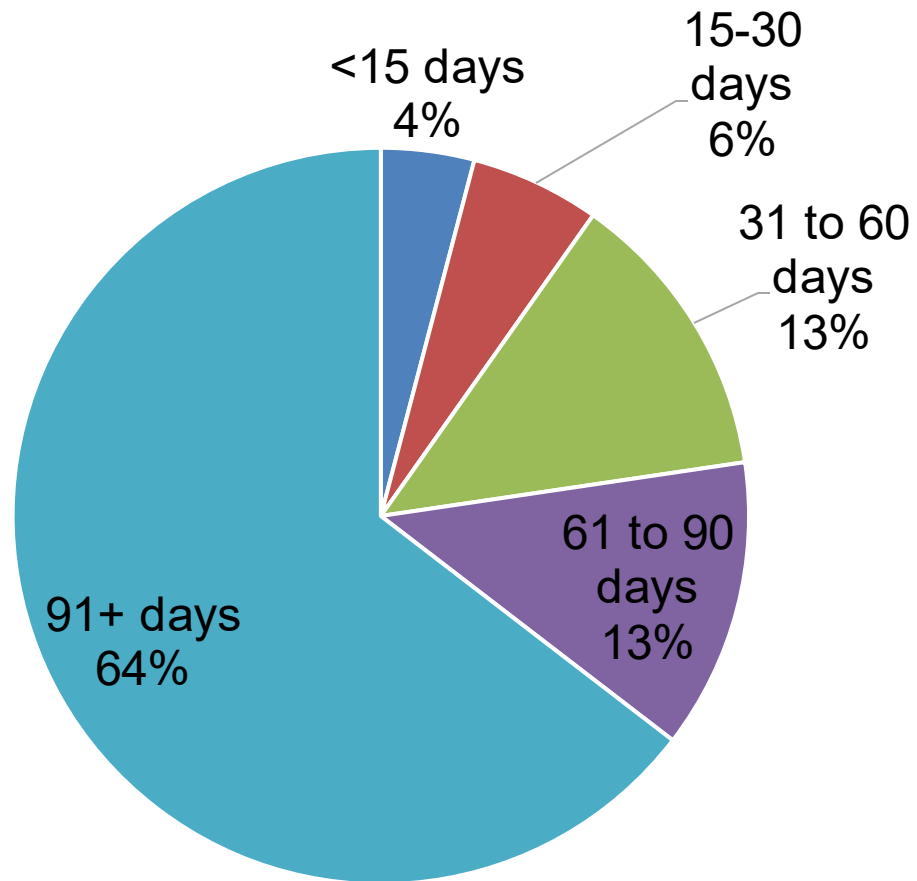
## Current Period



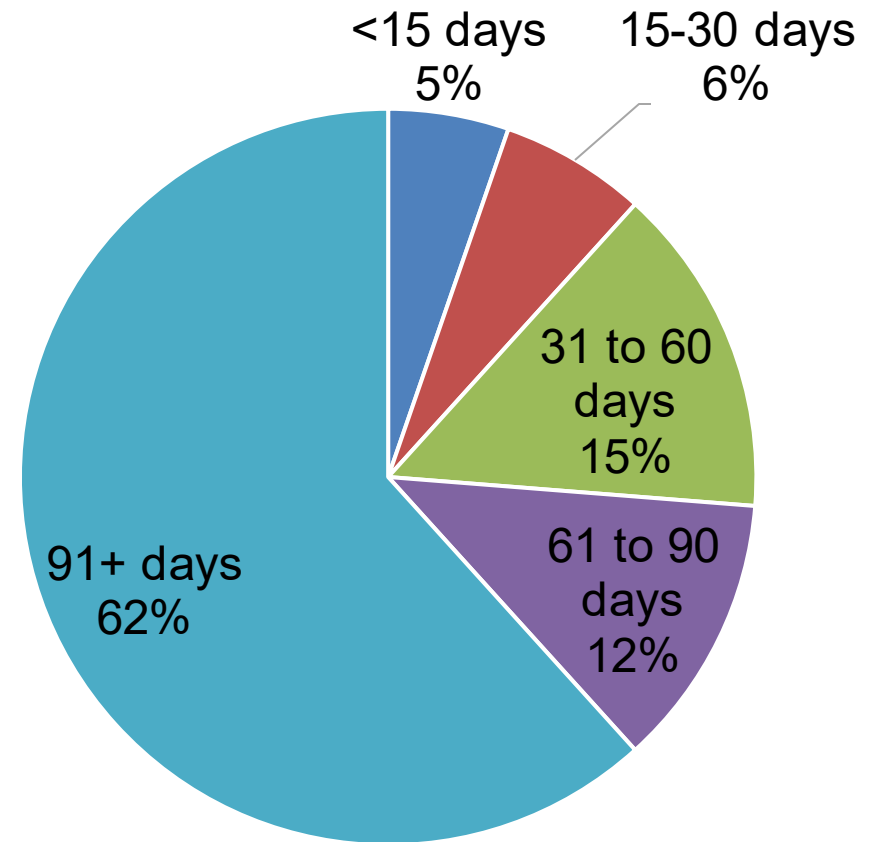
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# Lead Time: Australia

## Pre-Pandemic

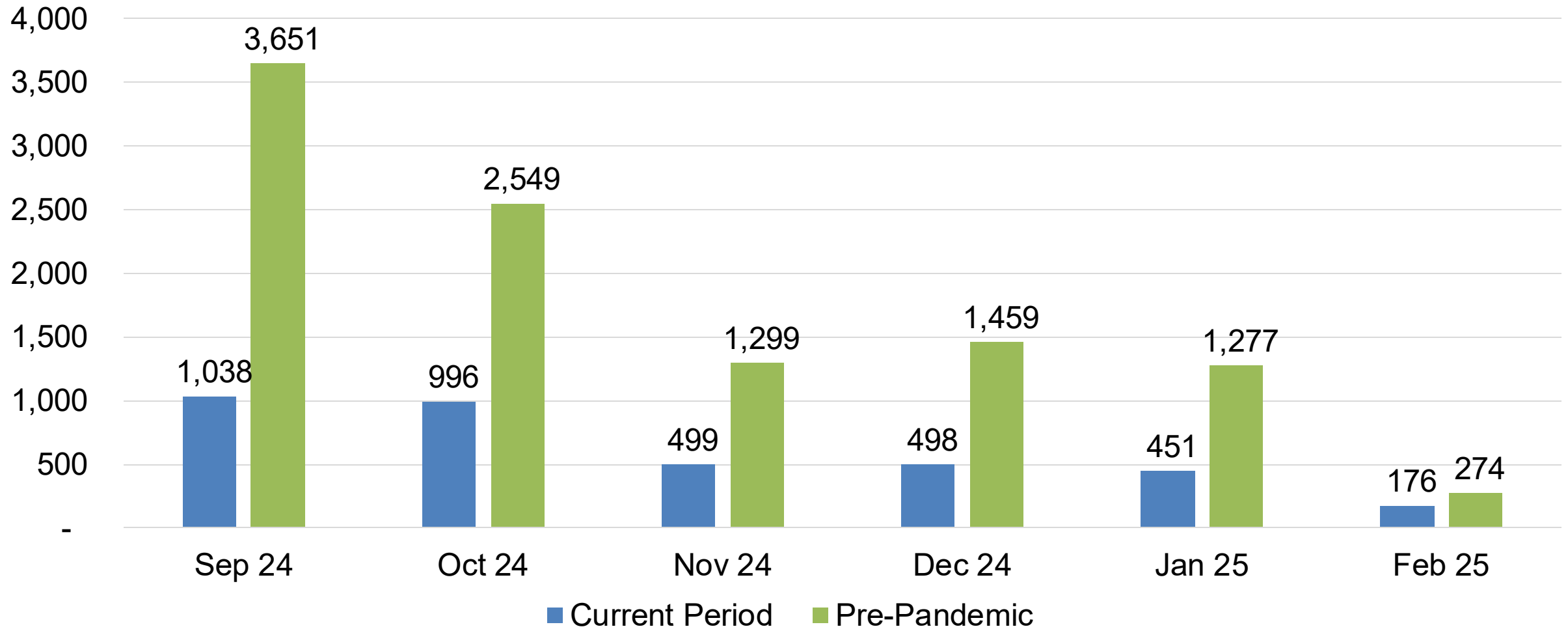


## Current Period



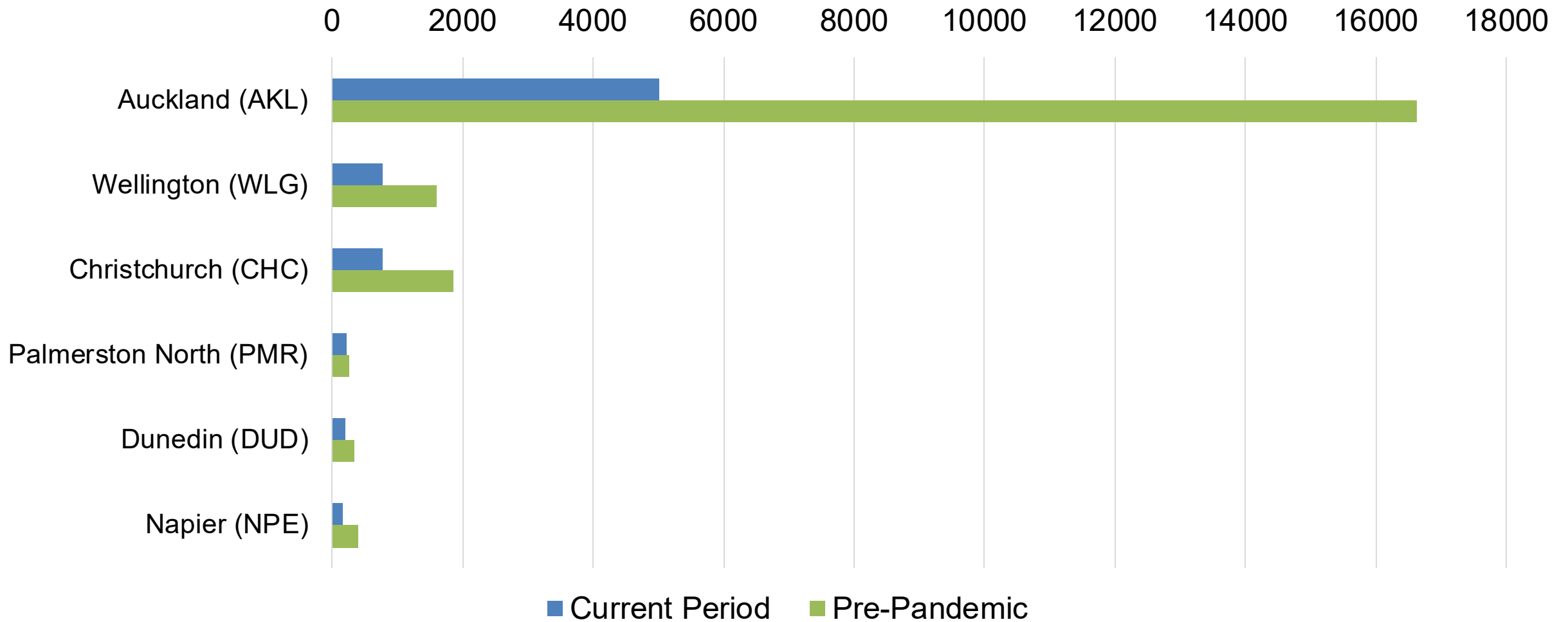
Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: New Zealand



Source: ARC/ForwardKeys Destination Gateway

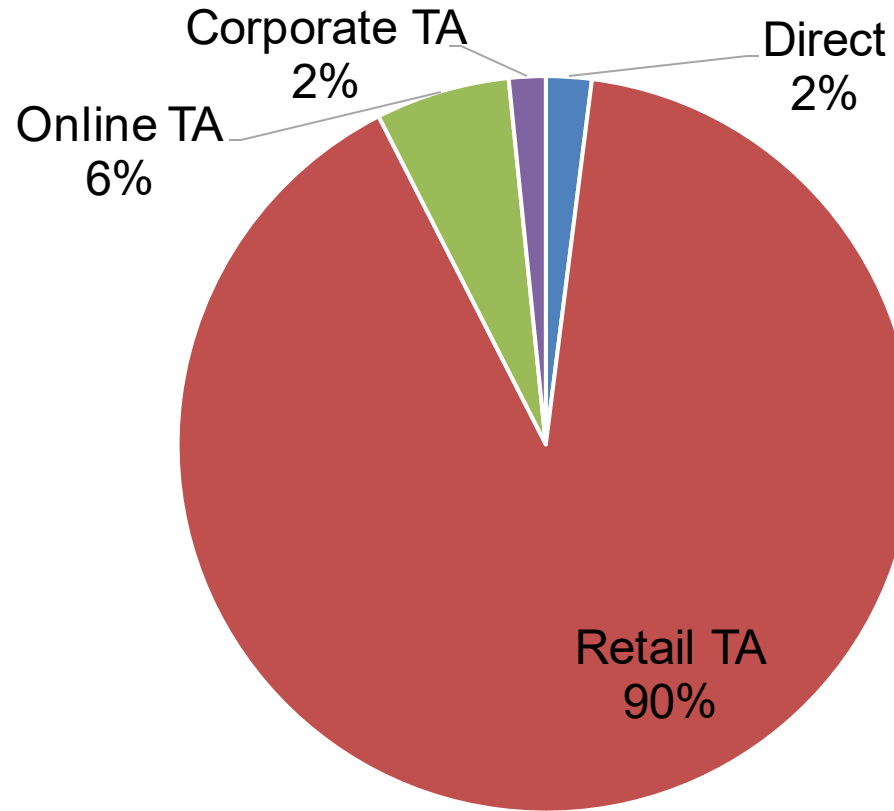
# Trip Origins: New Zealand



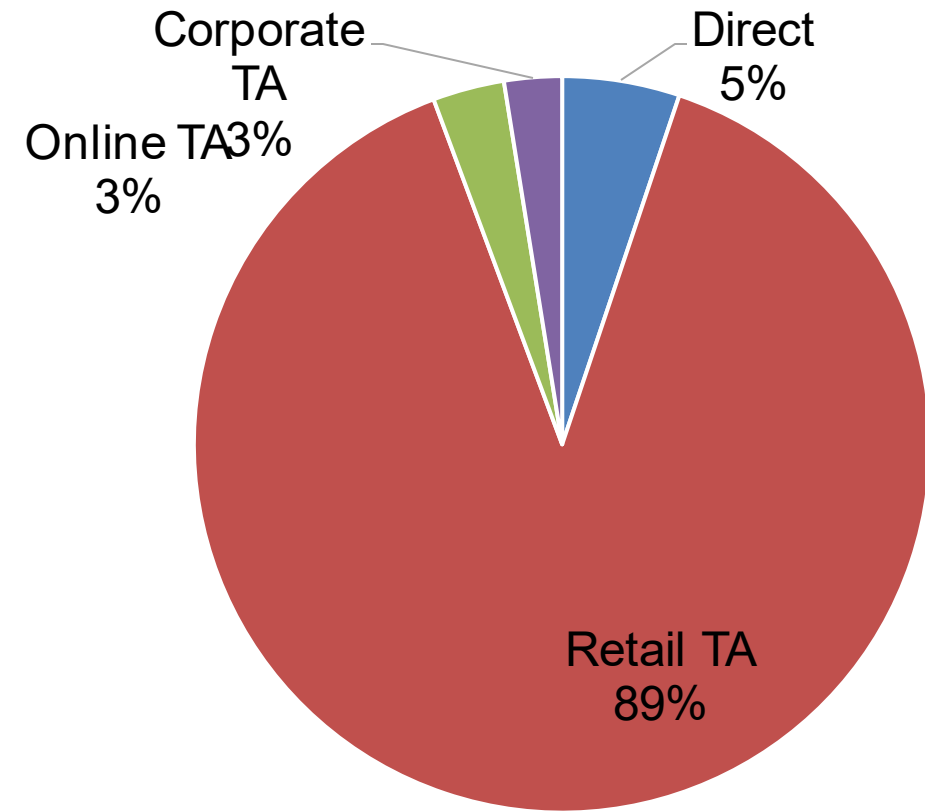
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# Distribution Channel: New Zealand

## Pre-Pandemic



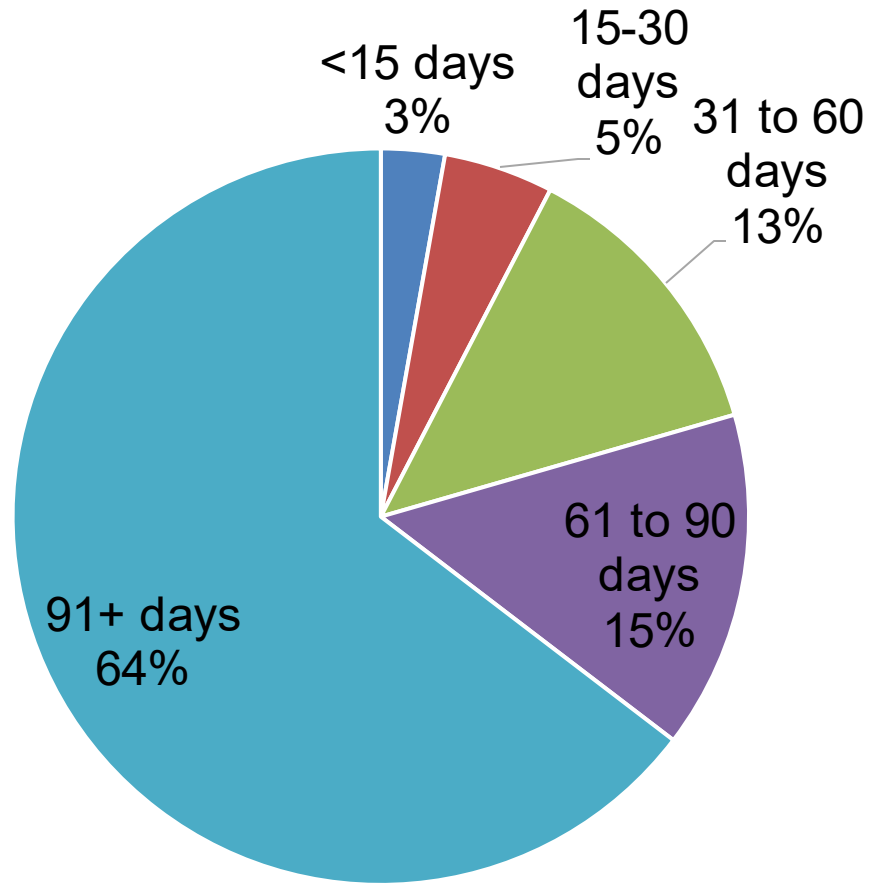
## Current Period



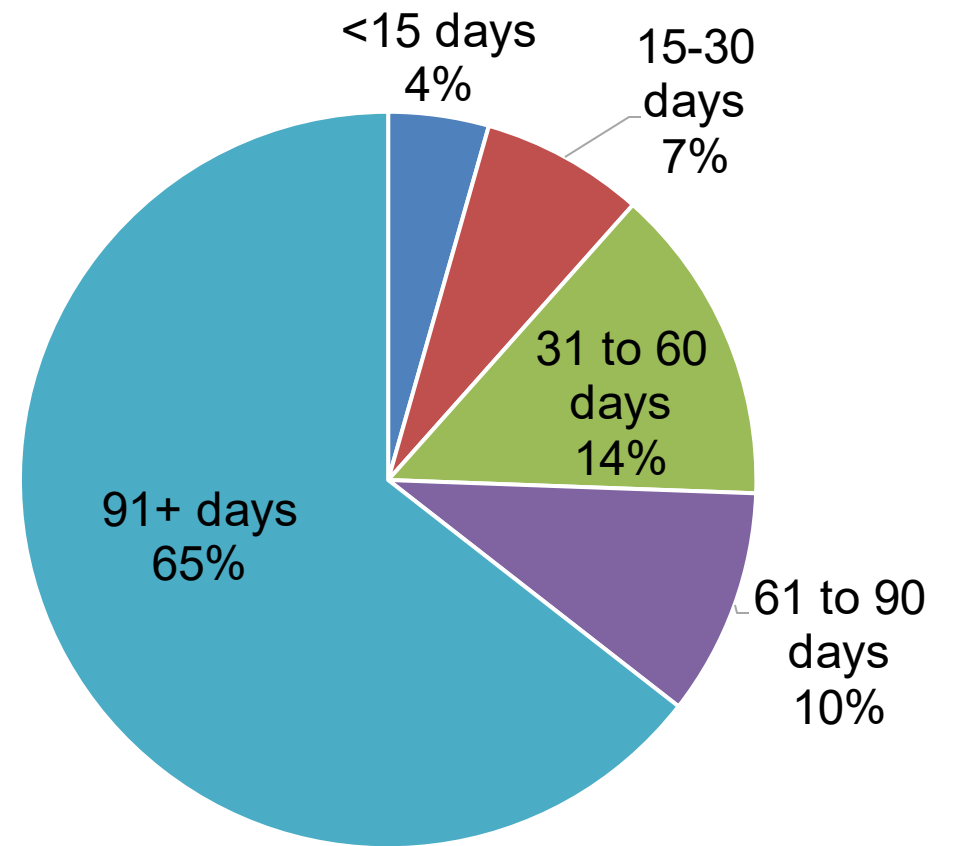
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# Lead Time: New Zealand

## Pre-Pandemic



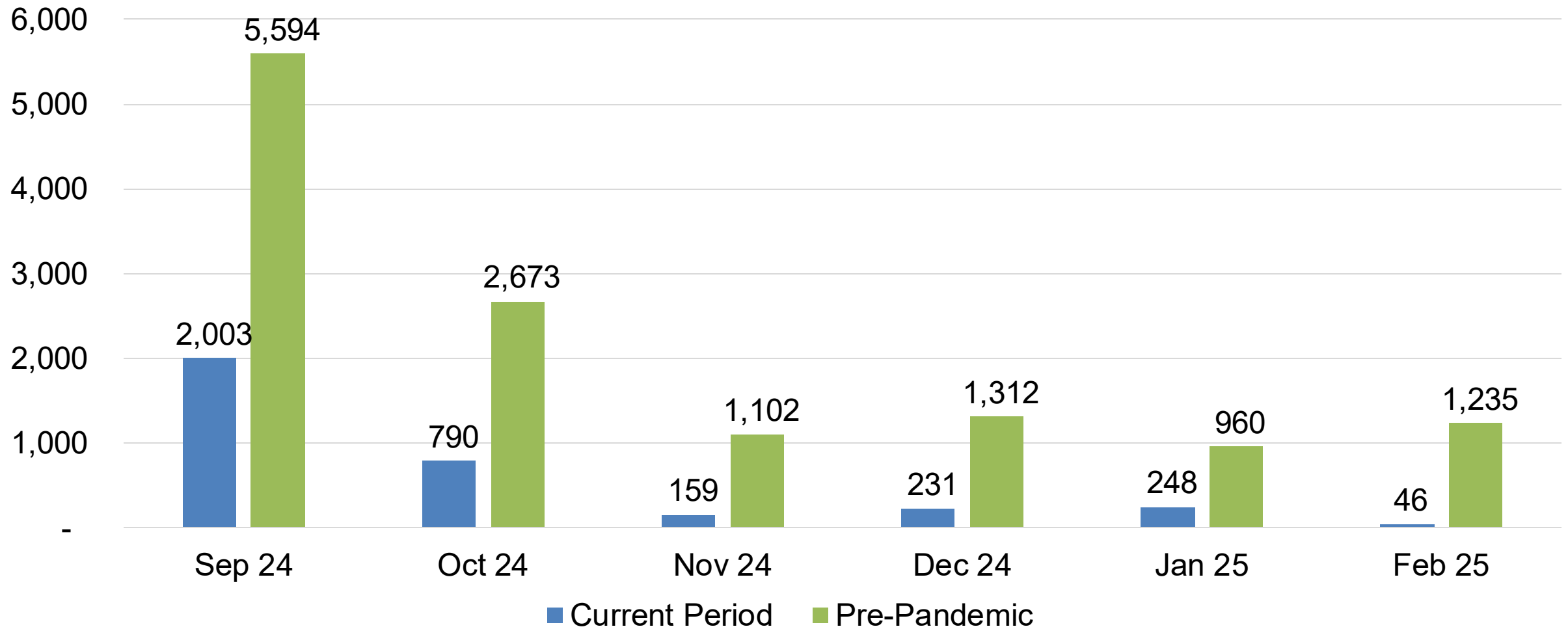
## Current Period



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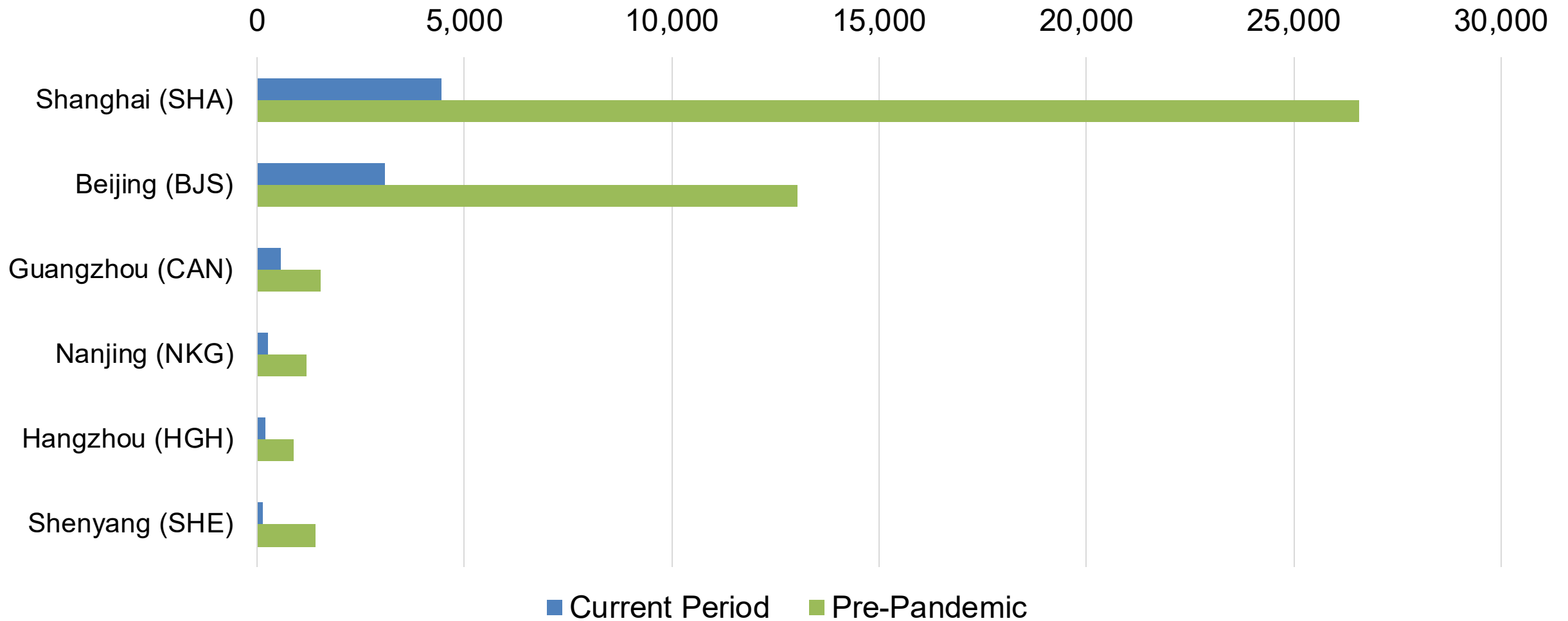


# Six Month Outlook: China



Source: ARC/ForwardKeys Destination Gateway

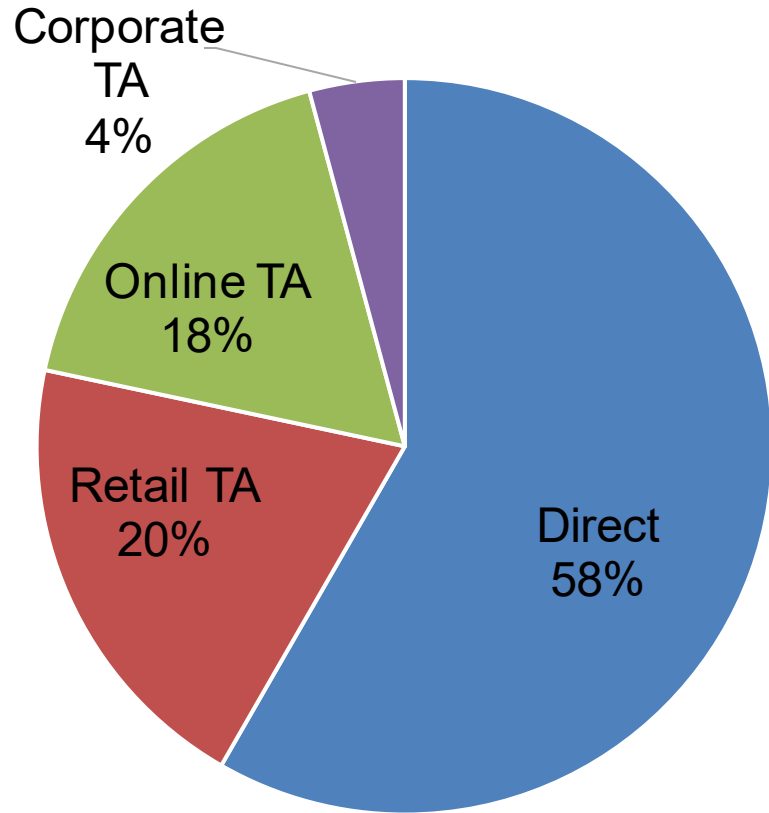
# Trip Origins: China



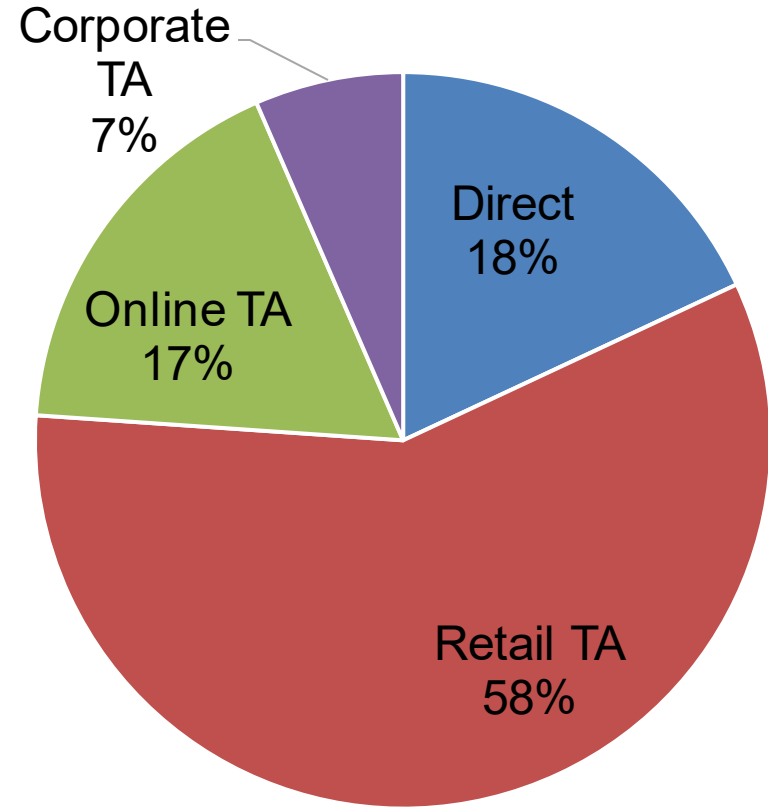
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# Distribution Channel: China

## Pre-Pandemic



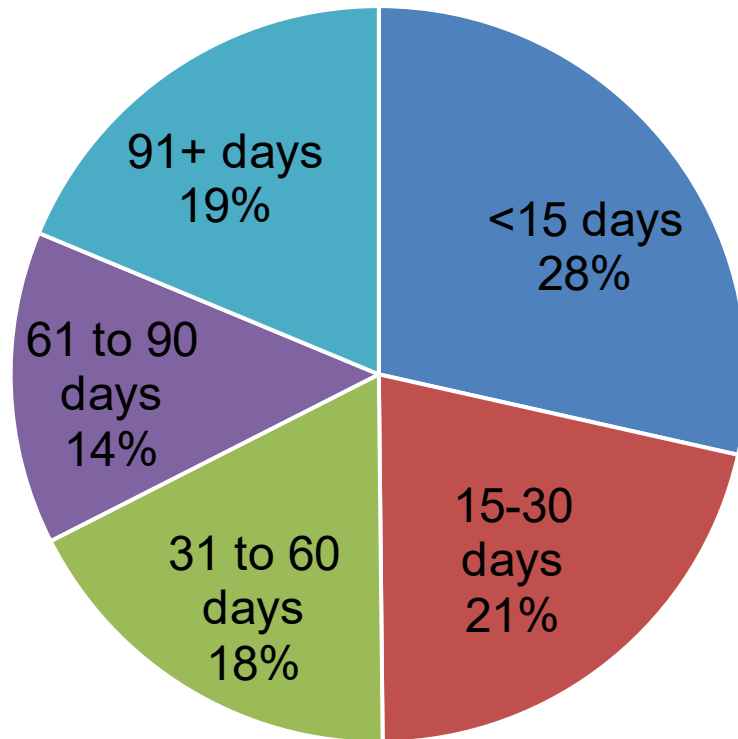
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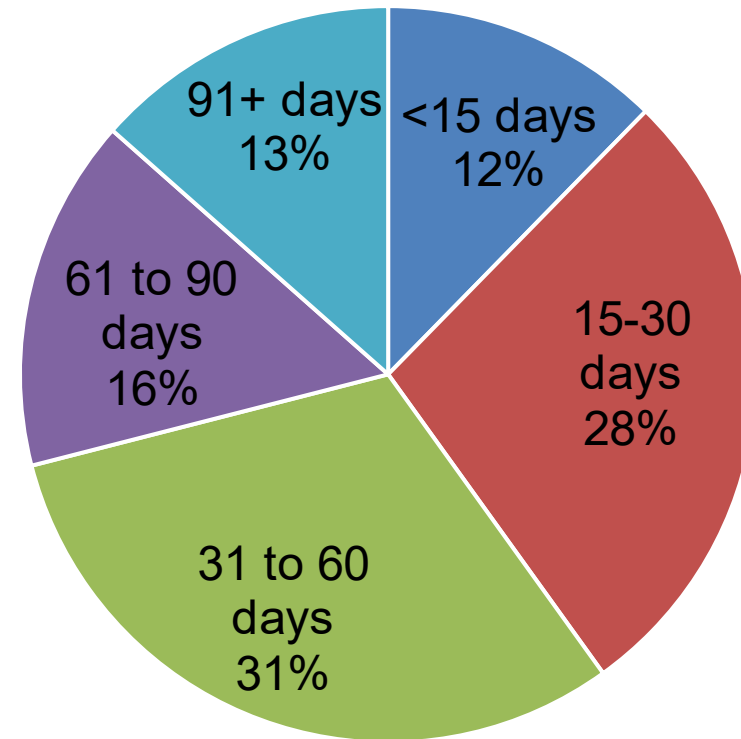
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# Lead Time: China

## Pre-Pandemic

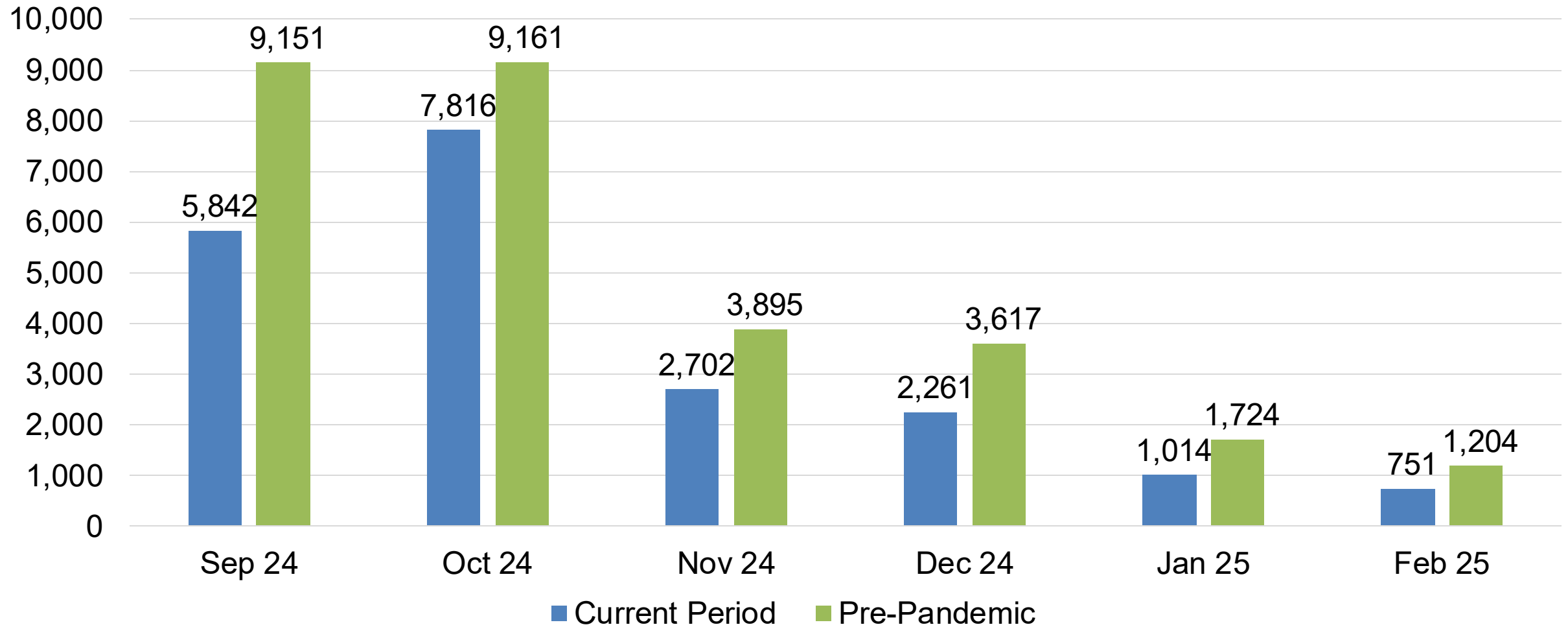


## Current Period



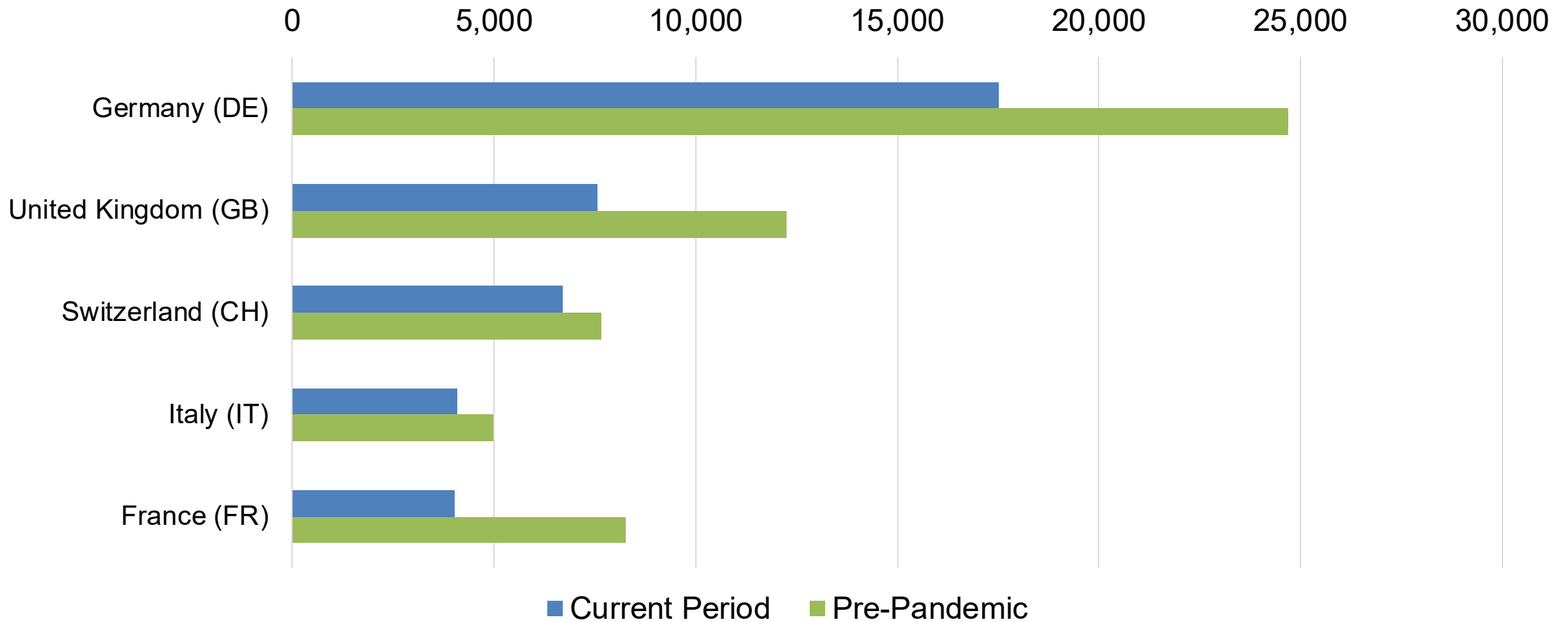
Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: Europe



Source: ARC/ForwardKeys Destination Gateway

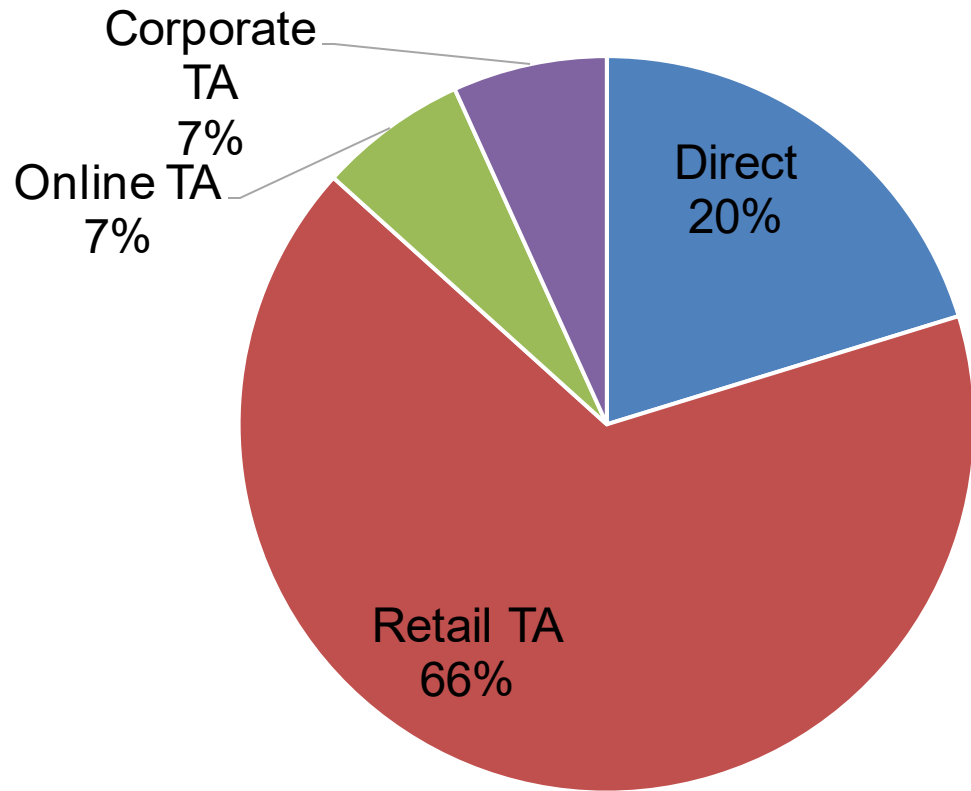
# Trip Origins: Europe



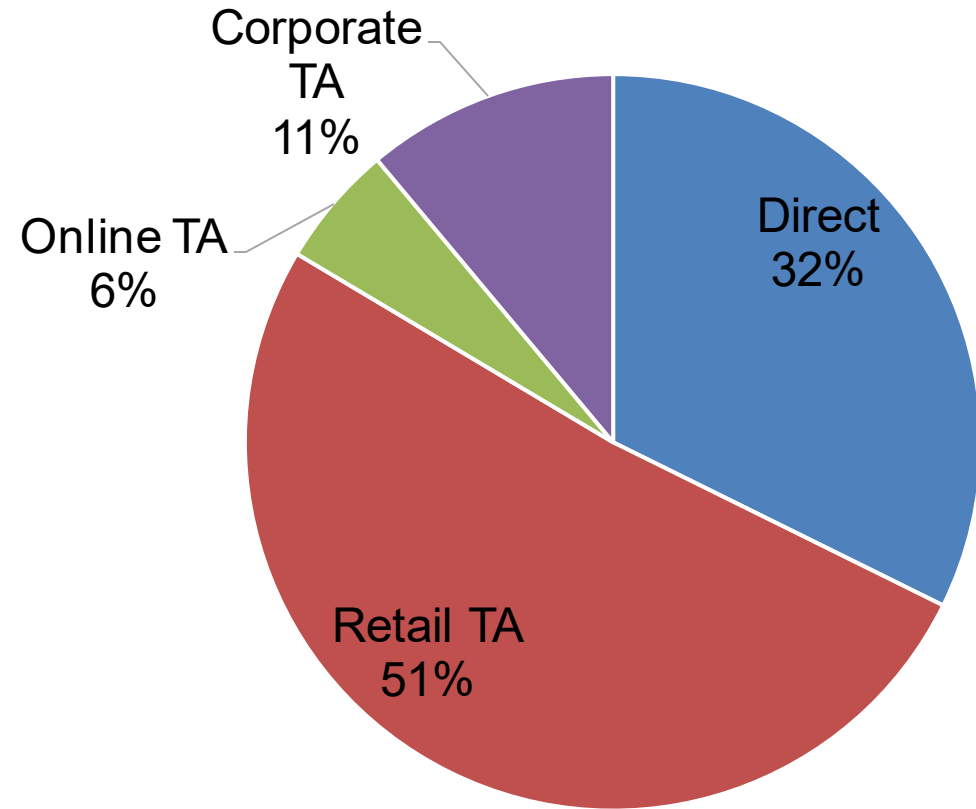
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# Distribution Channel: Europe

## Pre-Pandemic



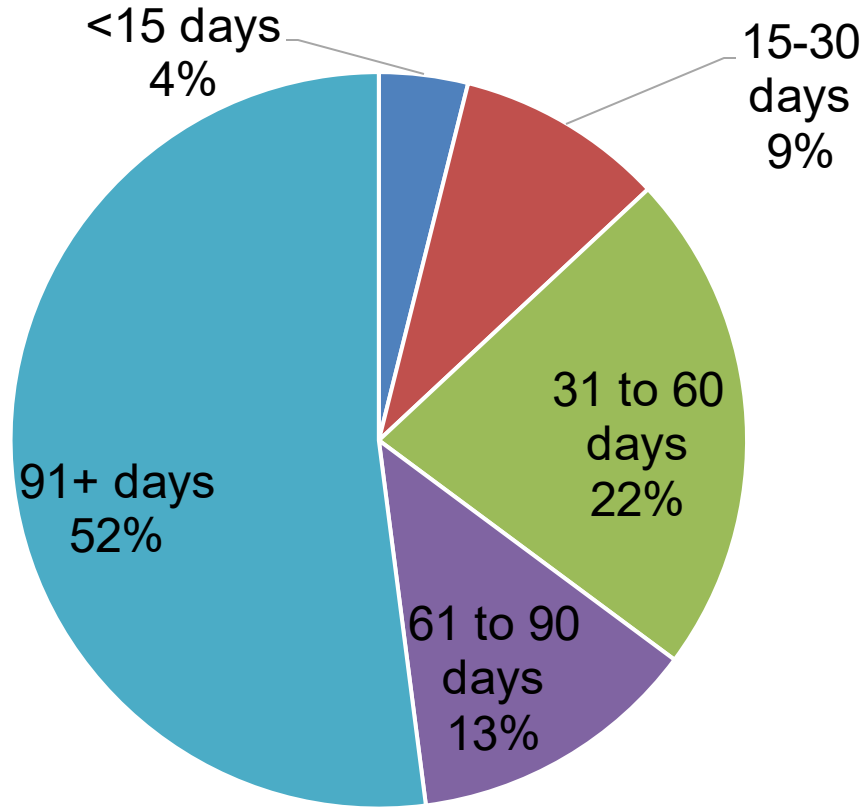
## Current Period



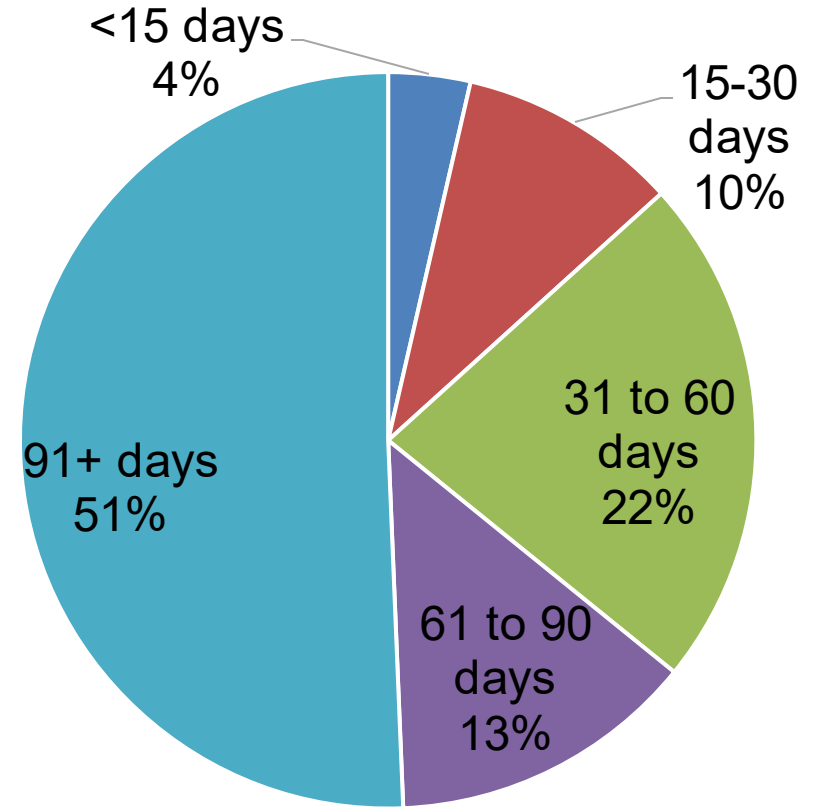
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# Lead Time: Europe

## Pre-Pandemic



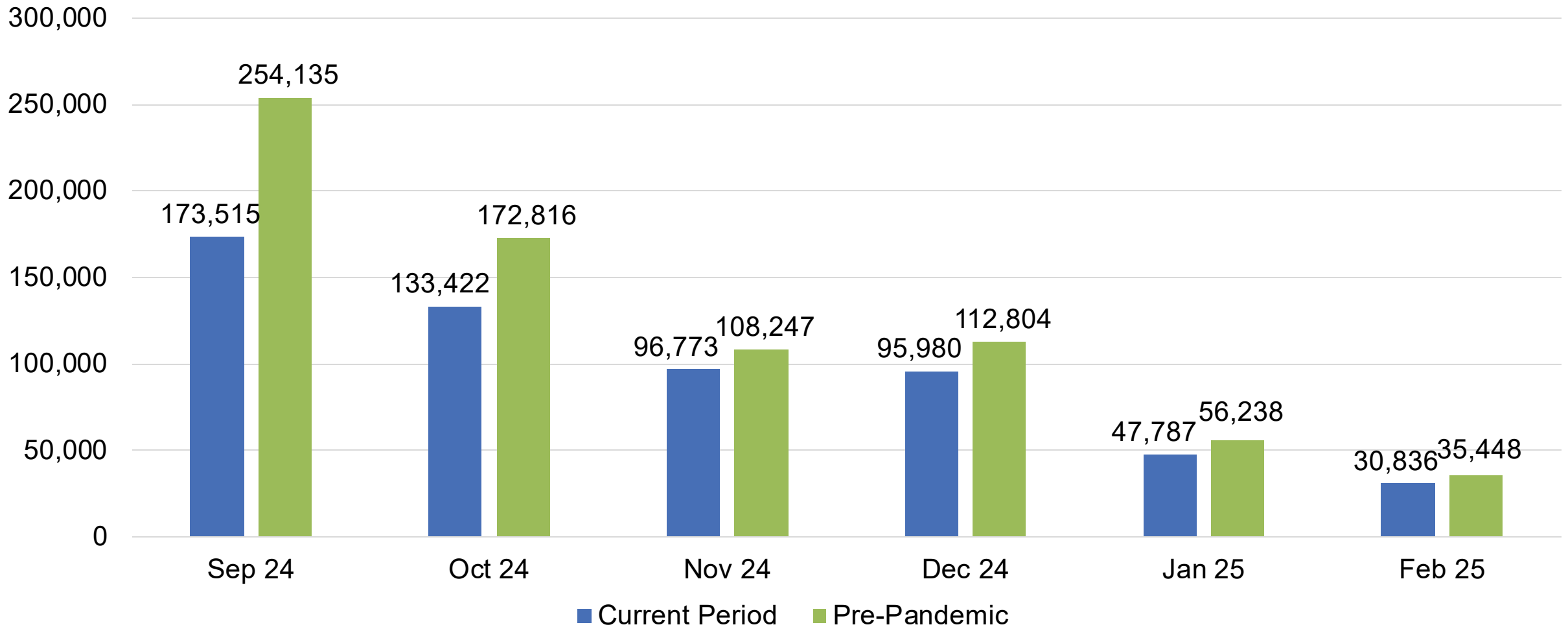
## Current Period



Source: ARC/ForwardKeys Destination Gateway

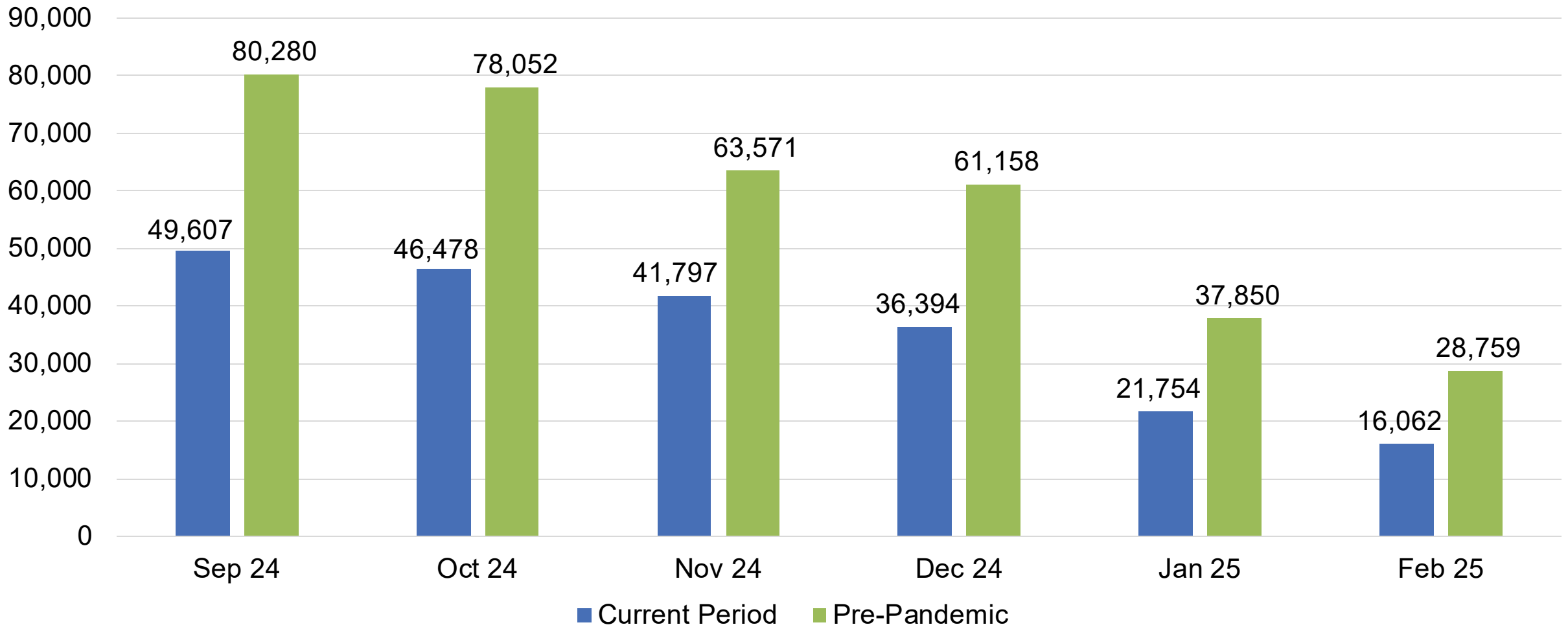


# Six Month Outlook: All Markets to O'ahu



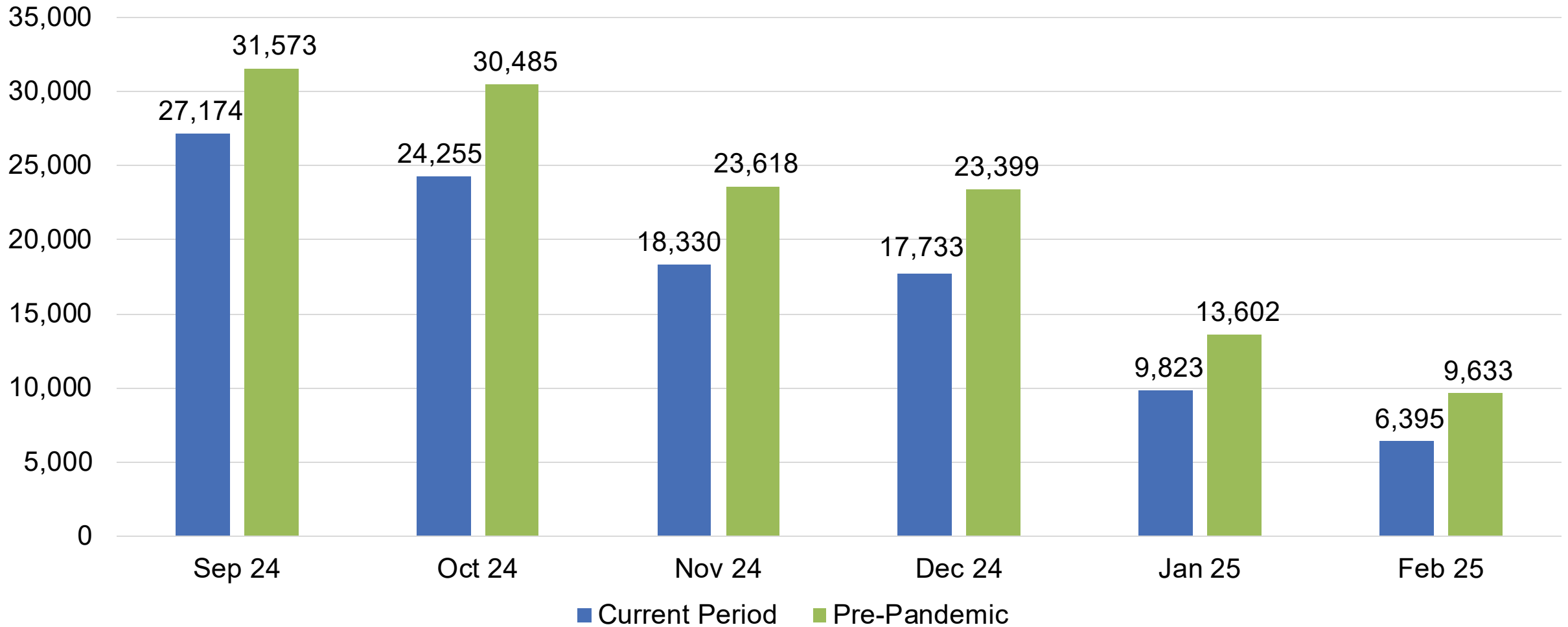
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# Six Month Outlook: All Markets to Maui



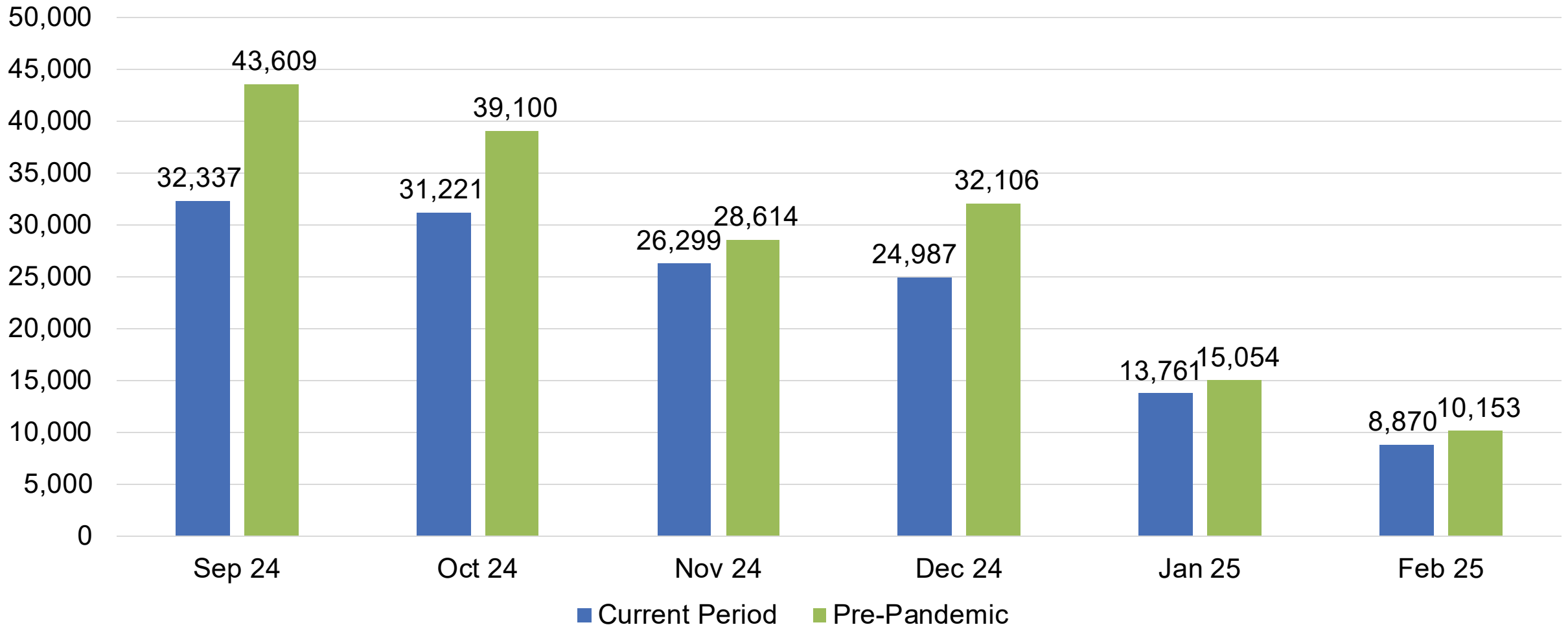
Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: All Markets to Kaua'i



Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: All Markets to Hawai'i Island



Source: ARC/ForwardKeys Destination Gateway

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AUTHORITY



# Market Insights – August 2024

The HTA Monthly Market Insights reports on the most recent key performance indicators that the Hawai'i Tourism Authority (HTA) uses to measure success. The following measures provide indicators of the overall health of Hawai'i's visitor industry and help to gauge if the HTA is successfully attaining its goals.

## Report on Economic Impact<sup>1</sup>

For the first eight months of 2024, Hawai'i's tourism economy experienced:

- Total visitor spending: \$14.06 billion, down from \$14.39 billion (-2.3%) in the first eight months of 2023, but higher than \$12.06 billion (+16.6%) in the first eight months of pre-pandemic 2019.
- Visitor arrivals: 6,526,015 visitors, compared to 6,671,951 visitors (-2.2%) in the first eight months of 2023 and 7,092,809 visitors (-8.0%) in the first eight months of 2019.
- Statewide average daily census<sup>2</sup>: 234,802 total visitors, compared to 246,069 visitors (-4.6%) in first eight months of 2023 and 254,988 visitors (-7.9%) in first eight months of 2019.
- Air service: 40,470 transpacific flights with 8,994,009 seats, compared to 40,913 flights (-1.1%) with 8,966,051 seats (+0.3%) in the first eight months of 2023 and 41,879 flights (-3.4%) with 9,217,268 seats (-2.4%) in the first eight months of 2019.
- For FY2025 (July 2024 - August 2024), the state collected \$149.1 million in TAT, compared \$158.2 million (-5.7%) collected in FY 2024 (July 2023 – August 2023), and \$121.3 million (+22.9%) collected in FY 2020 (July 2019 – August 2019) (Preliminary data from Dept of Taxation).

**Table 1: Overall Key Performance Indicators – Total (Air + Cruise) – Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2023**

		YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	📉	-2.3%	14,385.7	14,055.9	20,593.7
Daily Spend (\$PPPD)	📈	2.4%	239.6	245.3	244.0
Visitor Days	📉	-4.6%	60,040,776	57,291,798	84,392,803
Arrivals	📉	-2.2%	6,671,951	6,526,015	9,564,557
Daily Census	📉	-5.0%	247,081	234,802	230,581
Airlift (scheduled seats) <sup>^</sup>	📈	0.3%	8,936,164	8,963,440	13,290,542

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of September 17, 2024, subject to change.

**Table 2: Overall Key Performance Indicators – Total (Air + Cruise) – Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2019**

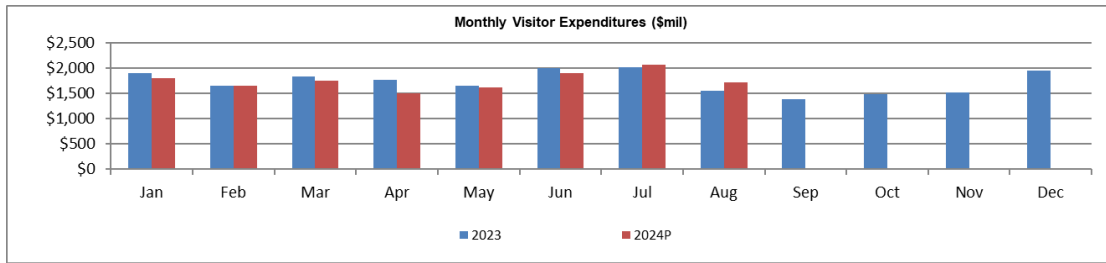
		YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	📈	16.6%	12,055.8	14,055.9	20,593.7
Daily Spend (\$PPPD)	📈	26.1%	194.6	245.3	244.0
Visitor Days	📉	-7.5%	61,961,974	57,291,798	84,392,803
Arrivals	📉	-8.0%	7,092,809	6,526,015	9,564,557
Daily Census	📉	-7.9%	254,988	234,802	230,581
Airlift (scheduled seats) <sup>^</sup>	📉	-2.1%	9,153,498	8,963,440	13,290,542

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of September 17, 2024, subject to change.

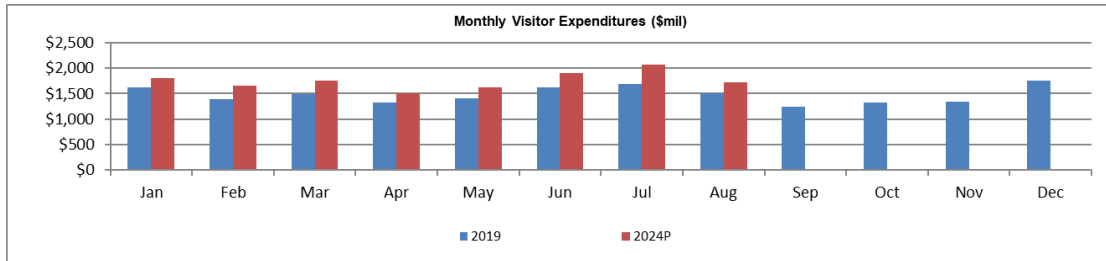
<sup>1</sup> 2024P visitor data are preliminary. 2023 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

<sup>2</sup> Average daily census measures the number of visitors present on any given day.

**Figure 1: Monthly Visitor Expenditures (\$mil) – Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2023**



**Figure 2: Monthly Visitor Expenditures (\$mil) – Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2019**



## Major Market Areas (MMAs)

### USA

**Table 3: Key Performance Indicators - U.S. Total (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2023)**

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	👇 -2.9%	11,182.6	10,861.6	15,794.7
Daily Spend (\$PPPD)	👆 3.0%	238.8	245.9	244.2
Visitor Days	👇 -5.7%	46,822,940	44,170,850	64,673,205
Arrivals	👇 -4.7%	5,249,278	5,003,214	7,268,850
Daily Census	👇 -6.1%	192,687	181,028	176,703
Airlift (scheduled seats)^	👇 -3.0%	7,381,399	7,162,278	10,600,428

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diao Mi flight schedules as of September 17, 2024, subject to change.

**Table 4: Key Performance Indicators - U.S. Total (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2019)**

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	👆 36.0%	7,984.9	10,861.6	15,794.7
Daily Spend (\$PPPD)	👆 32.0%	186.3	245.9	244.2
Visitor Days	👆 3.1%	42,851,073	44,170,850	64,673,205
Arrivals	👆 4.9%	4,771,257	5,003,214	7,268,850
Daily Census	👆 2.7%	176,342	181,028	176,703
Airlift (scheduled seats)^	👆 8.3%	6,611,400	7,162,278	10,600,428

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diao Mi flight schedules as of September 17, 2024, subject to change.

- The U.S. labor market added 142,000 jobs in August 2024, the U.S. Bureau of Labor Statistics reported. The unemployment rate rose to 4.3 percent in August.
- Despite financial market volatility and softer economic data, economic momentum remains positive and the U.S. is moving forward at a moderate pace. It is expected that GDP growth will average 2.4 percent for the remainder of 2024.

- The Conference Board Consumer Confidence Index rose in August 2024 to 103.3 (1985=100), from 101.9 in July. The Present Situation Index—based on consumers’ assessment of current business and labor market conditions—improved to 134.4 in August 2024 from 133.1 in July. The Expectations Index—based on consumers’ short-term outlook for income, business, and labor market conditions—also improved in August 2024 to 82.5. August marked the second consecutive month of the Index being above 80. (A reading below the threshold of 80 usually signals a recession ahead.)
- Despite a significant decline in the rate of inflation in the U.S. the past couple of years, according to the latest Longwoods International tracking study of American travelers, 57 percent of them report that inflation is still impacting their decision to travel in the next six months. And the percentage of travelers who say that inflation will greatly impact their travel decisions in the next six months jumped from 24 percent in July to 30 percent in August, the highest level in 2024.
- HTA Airline Seat Capacity Outlook for September-November 2024 was updated on Sept. 3rd. The forecast for domestic scheduled nonstop air seats to Hawai’i during this period will be up 1.8 percent compared to the same period in 2023. This projection is based on flights appearing in Diio Mi. An increase in seats is expected from U.S. West (+2.1%) with a small decrease from the U.S. East (-0.6%).

## US WEST

**Table 5: Key Performance Indicators - U.S. West (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2023)**

		YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	📉	-1.6%	6,704.1	6,598.6	9,606.9
Daily Spend (\$PPPD)	📈	3.8%	225.3	233.8	232.1
Visitor Days	📉	-5.1%	29,755,398	28,228,265	41,385,615
Arrivals	📉	-4.1%	3,503,091	3,360,563	4,880,379
Daily Census	📉	-5.5%	122,450	115,690	113,075
Airlift (scheduled seats) ^	📉	-2.5%	6,515,682	6,353,810	9,400,915

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of September 17, 2024, subject to change.

**Table 6: Key Performance Indicators - U.S. West (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2019)**

		YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	📈	40.8%	4,685.8	6,598.6	9,606.9
Daily Spend (\$PPPD)	📈	35.1%	173.0	233.8	232.1
Visitor Days	📈	4.2%	27,089,212	28,228,265	41,385,615
Arrivals	📈	7.0%	3,141,739	3,360,563	4,880,379
Daily Census	📈	3.8%	111,478	115,690	113,075
Airlift (scheduled seats) ^	📈	10.0%	5,777,523	6,353,810	9,400,915

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of September 17, 2024, subject to change.

- In the first eight months of 2024, there were 3,360,563 visitors from the U.S. West, compared to 3,503,091 visitors (-4.1%) in the first eight months of 2023 and 3,141,739 visitors (+7.0%) in the first eight months of pre-pandemic 2019. U.S. West visitors spent \$6.60 billion in the first eight months of 2024, compared to \$6.70 billion (-1.6%) in the first eight months of 2023 and \$4.69 billion (+40.8%) in the first eight months of 2019.
- In the first eight months of 2024, 30,524 scheduled flights with 6,353,810 seats serviced Hawai’i from U.S. West. In the first eight months of 2023, there were 31,540 scheduled flights (-3.2%) with 6,515,682 seats (-2.5%). In the first eight months of 2019 there were 28,819 scheduled flights (+5.9%) with 5,777,523 seats (+10.0%).



## US EAST

**Table 7: Key Performance Indicators - U.S. East (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2023)**

		YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	👉	-4.8%	4,478.5	4,263.0	6,187.8
Daily Spend (\$PPPD)	👉	1.9%	262.4	267.4	265.7
Visitor Days	👉	-6.6%	17,067,542	15,942,585	23,287,590
Arrivals	👉	-5.9%	1,746,187	1,642,651	2,388,471
Daily Census	👉	-7.0%	70,237	65,338	63,627
Airlift (scheduled seats) <sup>^</sup>	👉	-6.6%	865,717	808,468	1,199,513

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of September 17, 2024, subject to change.

**Table 8: Key Performance Indicators - U.S. East (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2019)**

		YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	👆	29.2%	3,299.0	4,263.0	6,187.8
Daily Spend (\$PPPD)	👆	27.8%	209.3	267.4	265.7
Visitor Days	👉	1.1%	15,761,860	15,942,585	23,287,590
Arrivals	👉	0.8%	1,629,517	1,642,651	2,388,471
Daily Census	👉	0.7%	64,864	65,338	63,627
Airlift (scheduled seats) <sup>^</sup>	👉	-3.0%	833,877	808,468	1,199,513

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of September 17, 2024, subject to change.

- In the first eight months of 2024, 1,642,651 visitors arrived from the U.S. East, compared to 1,746,187 visitors (-5.9%) in the first eight months of 2023 and 1,629,517 visitors (+0.8%) in the first eight months of 2019. U.S. East visitors spent \$4.26 billion in the first eight months of 2024, compared to \$4.48 billion (-4.8%) in the first eight months of 2023 and \$3.30 billion (+29.2%) in the first eight months of 2019.
- In the first eight months of 2024, 3,035 scheduled flights with 808,468 seats serviced Hawai'i from U.S. East. In the first eight months of 2023, there were 3,141 scheduled flights (-3.4%) with 865,717 seats (-6.6%). In the first eight months of 2019 there were 2,913 scheduled flights (+4.2%) with 833,877 seats (-3.0%).

## JAPAN

**Table 9: Key Performance Indicators – Japan (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2023)**

		YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	👆	27.8%	530.7	678.3	1,070.5
Daily Spend (\$PPPD)	👉	0.3%	237.2	237.8	241.9
Visitor Days	👆	27.5%	2,237,219	2,852,350	4,424,958
Arrivals	👆	37.6%	332,222	457,081	717,173
Daily Census	👆	27.0%	9,207	11,690	12,090
Airlift (scheduled seats) <sup>^</sup>	👆	44.4%	645,805	932,484	1,384,543

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of September 17, 2024, subject to change.

**Table 10: Key Performance Indicators – Japan (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2019)**

		YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	👇	-53.4%	1,455.9	678.3	1,070.5
Daily Spend (\$PPPD)	👉	0.0%	237.8	237.8	241.9
Visitor Days	👇	-53.4%	6,121,180	2,852,350	4,424,958
Arrivals	👇	-55.6%	1,029,549	457,081	717,173
Daily Census	👇	-53.6%	25,190	11,690	12,090
Airlift (scheduled seats) <sup>^</sup>	👇	-29.7%	1,326,446	932,484	1,384,543

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of September 17, 2024, subject to change.

- In the first eight months of 2024, there were 457,081 visitors from Japan, compared to 332,222 visitors (+37.6%) in the first eight months of 2023 and 1,029,549 visitors (-55.6%) in the first eight months of pre-pandemic 2019. Visitors from Japan spent \$678.3 million in the first eight months of 2024, compared to \$530.7 million (+27.8%) in the first eight months of 2023 and \$1.46 billion (-53.4%) in the first eight months of 2019.
- In the first eight months of 2024, 3,190 scheduled flights with 932,484 seats serviced Hawai'i from Japan. In the first eight months of 2023, there were 2,361 scheduled flights (+35.1%) with 645,805 seats (+44.4%). In the first eight months of 2019 there were 5,195 scheduled flights (-38.6%) with 1,326,446 seats (-29.7%).
- Japan's economy grew at an annualized rate of 3.1 percent in the second quarter (April-June) of 2024, rebounding from a contraction in the previous quarter. This growth was driven by increased consumption of automobiles and other durable goods. The GDP growth exceeded the average economist forecast of 2.3 percent, according to QUICK.
- The Japan National Tourism Organization estimates that 1,048,800 Japanese traveled abroad in July 2024, representing 61.2 percent of the figures from July 2019. This is a 2 percentage point increase compared to June 2024.
- Research by Euromonitor reveals that Japan has the highest percentage of solo travelers, with 19.2 percent of Japanese respondents reporting that they often travel alone for vacations, either domestically or internationally. This contrasts with 7.2 percent globally. The proportion of solo travelers in Japan has nearly doubled over the past five years, from 10.4 percent in 2019.
- On August 20, 2024, the ANA Group announced a reduction in flights on the Narita-Honolulu route starting January 2025. The service will decrease from 14 roundtrips per week (2 daily flights) to 10 roundtrips per week starting January 11, 2025. The reduction will affect the second daily flight, NH182/181, cutting it from 7 to 3 roundtrips per week. The first flight, NH184/183, will continue to operate 7 roundtrips per week.

## CANADA

Table 11: Key Performance Indicators – Canada (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2023)

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -14.1%	817.4	702.2	1,093.6
Daily Spend (\$PPPD)	↔ 2.0%	216.9	221.2	223.7
Visitor Days	↓ -15.8%	3,769,217	3,174,511	4,887,902
Arrivals	↓ -11.1%	321,569	285,842	432,558
Daily Census	↓ -16.1%	15,511	13,010	13,355
Airlift (scheduled seats) <sup>^</sup>	↓ -11.1%	319,009	283,546	420,651

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diiio Mi flight schedules as of September 17, 2024, subject to change.

Table 12: Key Performance Indicators – Canada (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2019)

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↔ -6.4%	750.1	702.2	1,093.6
Daily Spend (\$PPPD)	↑ 33.0%	166.3	221.2	223.7
Visitor Days	↓ -29.6%	4,510,009	3,174,511	4,887,902
Arrivals	↓ -23.0%	371,146	285,842	432,558
Daily Census	↓ -29.9%	18,560	13,010	13,355
Airlift (scheduled seats) <sup>^</sup>	↓ -17.0%	341,447	283,546	420,651

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diiio Mi flight schedules as of September 17, 2024, subject to change.

- In the first eight months of 2024, there were 285,842 visitors from Canada, compared to 321,569 visitors (-11.1%) in the first eight months of 2023 and 371,146 visitors (-23.0%) in the first eight months of pre-pandemic 2019. Visitors from Canada spent \$702.2 million in the first eight months of

2024, compared to \$817.4 million (-14.1%) in the first eight months of 2023 and \$750.1 million (-6.4%) in the first eight months of 2019.

- In the first eight months of 2024, 1,568 scheduled flights with 283,546 seats serviced Hawai'i from Canada. In the first eight months of 2023, there were 1,751 scheduled flights (-10.5%) with 319,009 seats (-11.1%). In the first eight months of 2019 there were 1,816 scheduled flights (-13.7%) with 341,447 seats (-17.0%).
- The overall unemployment rate is rising and is causing concern. It has increased to 6.6 percent in August 2024, which is the highest rate in 7 years. The government is adjusting immigration and temporary work visa policies as a result.
- During August, 2024, the Bank of Canada lowered its policy interest rate by a second straight 25 basis points (after a 25 basis point decrease in July, 2024), taking the rate to 4.25 percent. This was anticipated and is seen to be good news for the economy and consumer confidence overall.
- More than 9.9 million Canadians returned home from an overnight transborder trip to the U.S. in the first half of 2024, a lower level of activity than last year (-3.2%) but a larger volume than recorded in 2019 (+3.3%). Trips by air surpassed 5.26 million during the period, a larger volume than reported in 2019 (+16.7%) but a 12 percent drop versus last year. In contrast, the volume of trips by auto has grown 8.8 percent compared to last year but remains below the level seen in 2019 (-7.6%).
- For the full winter season, WestJet has increased average air capacity to O'ahu by 4 percent, Kaua'i by 27 percent, and Hawai'i Island by 9 percent year-over-year, while Maui has decreased by 23 percent. Worth noting is that this year-over-year comparison is to the reduced schedule utilized last winter season.

## OCEANIA

**Table 13: Key Performance Indicators – Oceania (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2023)**

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -14.8%	399.9	340.8	545.8
Daily Spend (\$PPPD)	↔ 0.4%	292.7	293.9	297.1
Visitor Days	↓ -15.1%	1,366,342	1,159,640	1,837,054
Arrivals	↓ -13.5%	152,281	131,769	208,756
Daily Census	↓ -15.5%	5,623	4,753	5,019
Airlift (scheduled seats) <sup>^</sup>	↓ -11.0%	219,427	195,326	296,106

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diiio Mi flight schedules as of September 17, 2024, subject to change.

**Table 14: Key Performance Indicators – Oceania (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2019)**

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -42.0%	587.3	340.8	545.8
Daily Spend (\$PPPD)	↑ 11.1%	264.5	293.9	297.1
Visitor Days	↓ -47.8%	2,220,599	1,159,640	1,837,054
Arrivals	↓ -43.9%	234,869	131,769	208,756
Daily Census	↓ -48.0%	9,138	4,753	5,019
Airlift (scheduled seats) <sup>^</sup>	↓ -41.0%	331,065	195,326	296,106

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diiio Mi flight schedules as of September 17, 2024, subject to change.

- In the first eight months of 2024, 131,769 visitors arrived from Oceania (Australia and New Zealand) and visitor spending was \$340.8 million. There were 152,281 visitors (-13.5%) in the first eight months of 2023 and visitor spending was \$399.9 million (-14.8%). In the first eight months of pre-pandemic 2019, 234,869 visitors (-43.9%) arrived from this market and visitor spending was \$587.3 million (-42.0%).
- In the first eight months of 2024, there were 533 scheduled flights with 155,418 seats from Melbourne and Sydney compared to 521 flights (+2.3%) with 157,302 seats (-1.2%) in the first eight months of

2023. Air capacity remained below the first eight months of 2019 level (779 flights, -31.6% with 245,919 seats, -36.8%) with service from Brisbane, Melbourne, and Sydney.

- There were 137 scheduled flights with 39,908 seats from Auckland in the first eight months of 2024, compared to 215 flights (-36.3%) with 62,125 seats (-35.8%) in the first eight months of 2023 and 295 flights (-53.6%) with 85,146 seats (-53.1%) in the first eight months of 2019.
- In Australia, research by Roy Morgan showed that households' confidence in their future financial situation jumped to a five-month high during August 2024 and is now back in 'positive' territory. The positive shift may be linked to monthly inflation data, which showed a fall in inflation to under 4 percent.
- In New Zealand there is more good news with the Reserve Bank of New Zealand (RBNZ) cutting interest rates by 0.25 percent to 5.25 percent. This was the RBNZ's first cut to interest rates for over four years since March 2020.
- During August 2024, both the AUD and NZD increase in value against the USD reaching the highest level this year to AUD 68.2cents and NZD 62.9cents.
- According to the Australian Bureau of Statistics, in June 2024 a total of 863,950 short-term trips were recorded, an increase of 134,410 compared with the corresponding month of the previous year. The number of trips was 2.6 percent higher than the pre-COVID level in June 2019. New Zealand-resident trips were 235,000 in June 2024, increasing by 22,800 from the June 2023.
- July 2024 arrivals to Hawai'i from Australia/NZ were down 16.9 percent. Since April 2024, this decrease can be largely attributed to the withdrawal of Auckland flights by Hawaiian Airlines who are now operating only seasonal service. The New Zealand market had been 23 percent up for the first quarter, but is now down 26 percent year-to-date.
- Qantas announced that beginning in May 2025, they will commence three weekly flights between Melbourne and Honolulu. This will replace the current service by Qantas' low-cost subsidiary, Jetstar, who currently operate twice a week. It is positive news for Hawai'i as the change will target and capture the Qantas higher-spend demographic.

## OTHER ASIA

**Table 15: Key Performance Indicators – Other Asia (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2023)**

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -14.2%	378.0	324.5	NA
Daily Spend (\$PPPD)	↔ 2.2%	311.0	317.7	NA
Visitor Days	↓ -16.0%	1,215,706	1,021,411	NA
Arrivals	↓ -13.1%	139,404	121,179	NA
Daily Census	↓ -16.3%	5,003	4,186	NA
Airlift (scheduled seats)^	↔ 3.2%	186,229	192,221	277,962

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of September 17, 2024, subject to change.

**Table 16: Key Performance Indicators – Other Asia (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2019)**

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -42.1%	560.6	324.5	NA
Daily Spend (\$PPPD)	↔ 9.8%	289.2	317.7	NA
Visitor Days	↓ -47.3%	1,938,104	1,021,411	NA
Arrivals	↓ -50.0%	242,458	121,179	NA
Daily Census	↓ -47.5%	7,976	4,186	NA
Airlift (scheduled seats)^	↓ -41.9%	331,035	192,221	277,962

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of September 17, 2024, subject to change.

## KOREA

**Table 17: Key Performance Indicators – Korea (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2023)**

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↗ 1.7%	281.4	286.2	440.7
Daily Spend (\$PPPD)	↗ 1.1%	310.4	313.9	319.6
Visitor Days	↗ 0.6%	906,588	911,983	1,378,778
Arrivals	↗ 1.9%	104,988	106,948	162,209
Daily Census	↗ 0.2%	3,731	3,738	3,767
Airlift (scheduled seats)^	↗ 3.2%	186,229	192,221	277,962

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diao Mi flight schedules as of September 17, 2024, subject to change.

**Table 18: Key Performance Indicators – Korea (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2019)**

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↘ -9.3%	315.5	286.2	440.7
Daily Spend (\$PPPD)	↗ 15.3%	272.2	313.9	319.6
Visitor Days	↘ -21.3%	1,159,169	911,983	1,378,778
Arrivals	↘ -27.9%	148,233	106,948	162,209
Daily Census	↘ -21.6%	4,770	3,738	3,767
Airlift (scheduled seats)^	↘ -11.9%	218,242	192,221	277,962

\*DBEDT 2023 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diao Mi flight schedules as of September 17, 2024, subject to change.

- In the first eight months of 2024, 106,948 visitors arrived from Korea and visitor spending was \$286.2 million. There were 104,988 visitors (+1.9%) in the first eight months of 2023 and visitor spending was \$281.4 million (+1.7%). In the first eight months of pre-pandemic 2019, 148,233 visitors (-27.9%) arrived from this market and visitor spending was \$315.5 million (-9.3%).
- In the first eight months of 2024, 627 scheduled flights with 192,221 seats serviced Hawai'i from Korea. In the first eight months of 2023, there were 604 scheduled flights (+3.8%) with 186,229 seats (+3.2%). In the first eight months of 2019 there were 680 scheduled flights (-7.8%) with 218,242 seats (-11.9%).
- In August 2024, the South Korean won appreciated to 1,352.19 KRW/USD from 1,383.09 KRW/USD in July 2024.
- In July 2024, there were 2,501,969 outbound Korean travelers, representing a 16.2 percent year-over-year increase from 2,153,857 departures in the same month last year.
- During the first half of 2024, South Korean outbound travel totaled 14,023,382, reflecting a 93.4 percent recovery compared to the same period in 2019. The top 10 destinations for South Korean travelers were Japan, Vietnam, Thailand, the United States, the Philippines, Taiwan, Hong Kong, Singapore, Macau, and Guam.
- Typically, summer (July-August) and winter (January-February) are peak travel seasons in Korea. However, this summer has been unusually quiet. Increased consumer anxiety about third-party platforms, particularly following current issues with TMON, has led more people to book directly with suppliers or avoid travel altogether, weakening travel agencies. Additionally, changing consumer attitudes toward spending have also dampened travel enthusiasm.
- The Chuseok holiday runs from September 14 to 18, 2024, with many extending their break to include the weekends, resulting in a rare nine-day vacation. According to Hana Tour, overseas travel bookings for departures between September 13 and 15 increased by 10 percent compared to bookings for the first three days of last year's Chuseok holiday.
- Airlift: In August 2024, Korean Air operated daily flights, Asiana Airlines and Hawaiian Airlines each operated 5 weekly flights.

## CHINA

**Table 19: Key Performance Indicators – China (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2023)**

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -61.3%	67.1	26.0	NA
Daily Spend (\$PPPD)	↔ -3.2%	363.9	352.2	NA
Visitor Days	↓ -60.0%	184,299	73,726	NA
Arrivals	↓ -52.4%	21,574	10,275	NA
Daily Census	↓ -60.2%	758	302	NA
Airlift (scheduled seats) <sup>^</sup>	N/A	N/A	N/A	N/A

\*DBEDT 2023 annual forecast (Quarter 3, 2024) N/A=Not available.

**Table 20: Key Performance Indicators – China (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2019)**

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -85.7%	182.1	26.0	NA
Daily Spend (\$PPPD)	↔ 8.5%	324.7	352.2	NA
Visitor Days	↓ -86.9%	560,682	73,726	NA
Arrivals	↓ -85.2%	69,626	10,275	NA
Daily Census	↓ -86.9%	2,307	302	NA
Airlift (scheduled seats) <sup>^</sup>	N/A	86,171	N/A	N/A

\*DBEDT 2023 annual forecast (Quarter 3, 2024). N/A=Not available

- In the first eight months of 2024, 10,275 visitors arrived from China and visitor spending was \$26.0 million. There were 21,574 visitors (-52.4%) in the first eight months of 2023 and visitor spending was \$67.1 million (-61.3%). In the first eight months of pre-pandemic 2019, 69,626 visitors (-85.2%) arrived from this market and visitor spending was \$182.1 million (-85.7%).
- There have been no direct flights from China to Hawai'i since service ended in early February 2020. There were 315 flights with 86,171 seats in the first eight months of 2019 with service to Shanghai (52,560 seats), Beijing (22,334) and Hangzhou (786).
- In August 2024, the exchange rate for the Chinese Yuan (CNY) versus the USD was 7.13, unchanged from July 2024 but slightly improved from 7.18 in August 2023.
- China's annual inflation rate rose to 0.6 percent in August 2024, up from 0.5 percent in July but less than the market forecast of 0.7 percent.
- China's unemployment rate for July 2024 was 5.2 percent, consistent with the previous month's figure.
- Favorable policies, including visa-free entry and 144-hour transit visa exemptions, have led to a significant increase in cross-border travel this summer. In July and August 2024, China's border control agencies processed 110 million inbound and outbound trips, averaging 1.78 million per day, a 30 percent increase from the same period last year. The daily peak occurred on August 24, with nearly 2.24 million travelers, reaching 97.2 percent of the historical high, according to the National Immigration Administration.
- On August 30, 2024, United Airlines resumed its direct flight from Shanghai to Los Angeles (flight UA199), marking a significant step in reconnecting China and the US. This resumption is anticipated to boost Chinese tourism to Los Angeles. At the gala event, Rofia Larsson, VP of Global Tourism Development at Tourism Los Angeles, emphasized the route's importance in linking Shanghai and Los Angeles, facilitating easier travel for both Chinese and American tourists. Los Angeles remains committed to the Chinese market, introducing new attractions and experiences to welcome visitors.
- Data from the US International Trade Administration shows that only 1.2 million people flew between the US and China in the first seven months of 2024, compared to 5.1 million during the same period five years ago. The closure of Russian airspace to US airlines but not to Chinese carriers has provided a competitive advantage in cost and time for Chinese airlines. The share of Americans flying

between the two countries was three percentage points lower in the first seven months of 2024 compared to 2019, while the number of foreign travelers, primarily Chinese nationals, has increased accordingly.

## EUROPE

**Table 21: Key Performance Indicators – Europe (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2023)**

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -32.0%	247.7	168.4	261.9
Daily Spend (\$PPPD)	↓ -11.7%	242.6	214.2	227.5
Visitor Days	↓ -23.0%	1,020,834	786,230	1,150,933
Arrivals	↓ -24.5%	79,232	59,810	85,571
Daily Census	↓ -23.3%	4,201	3,222	3,145
Airlift (scheduled seats) <sup>^</sup>	N/A	N/A	N/A	N/A

\*DBEDT 2023 annual forecast (Quarter 3, 2024). N/A=Not available

**Table 22: Key Performance Indicators – Europe (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2019)**

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↔ -8.7%	184.4	168.4	261.9
Daily Spend (\$PPPD)	↑ 34.2%	159.6	214.2	227.5
Visitor Days	↓ -31.9%	1,155,110	786,230	1,150,933
Arrivals	↓ -33.2%	89,559	59,810	85,571
Daily Census	↓ -32.2%	4,754	3,222	3,145
Airlift (scheduled seats) <sup>^</sup>	N/A	N/A	N/A	N/A

\*DBEDT 2023 annual forecast Quarter 3, 2024). N/A=Not available

- In the first eight months of 2024, 59,810 visitors arrived from Europe (including United Kingdom, France, Germany, Italy, and Switzerland) and visitor spending was \$168.4 million. There were 79,232 visitors (-24.5%) in the first eight months of 2023 and visitor spending was \$247.7 million (-32.0%). In the first eight months of pre-pandemic 2019, 89,559 visitors (-33.2%) arrived from this market and visitor spending was \$184.4 million (-8.7%).
- In August 2024, the British Pound remained stable against the US Dollar at 1.29 USD per Pound. The Euro averaged 1.09 USD, showing a slight increase from July 2024. The CHF/USD exchange rate averaged 1.15 USD, indicating a modest strengthening compared to the previous month.
- According to Globetrender, Global Data forecasts that UK departures will reach 86.9 million by 2024, surpassing the 84.7 million recorded in 2019, despite the economic downturn in Europe. This marks a shift from the "fly less, stay longer" trend of 2021. BA Holidays reports that the most searched package holiday destinations for UK consumers in 2024 include New York, Orlando, Dubai, Barbados, Cancun, Maldives, Las Vegas, Tenerife, Dominican Republic, and St Lucia.
- As of August 2024, outbound travel from Germany continues to show significant growth, with international departures rebounding strongly. Euromonitor International projects that approximately 122 million Germans will travel abroad in 2024, surpassing the pre-pandemic high of 116.1 million in 2019.
- Audley Travel reports that discerning UK travelers are increasingly seeking alternative, less-crowded experiences, elevating less-visited but equally appealing destinations on their travel wish lists.
- TUI indicates that autumn 2024 is set to be the strongest season ever for autumn travel. Germans are showing high demand for Mediterranean destinations such as Turkey, Spain, Greece, and Egypt. Long-haul travel trends also reveal strong interest in destinations including the USA, UAE, Thailand, Maldives, and Mauritius.
- A notable shift towards sustainable travel is emerging among German and Swiss travelers, with many opting for eco-friendly accommodations and transport options. This trend underscores a growing

commitment to environmental responsibility as travel demand rebounds, with German-speaking travelers increasingly prioritizing sustainability.

- Swiss travelers are increasingly exploring international destinations, fueled by the strong Swiss franc. There is notable interest in long-haul travel to the United States, Japan, and Australia, alongside traditional favorites such as France, Italy, and Spain.

## LATIN AMERICA

**Table 23: Key Performance Indicators – Latin America (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2023)**

		YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓	-19.9%	60.8	48.7	NA
Daily Spend (\$PPPD)	↓	-20.2%	306.2	244.5	NA
Visitor Days	↔	0.3%	198,428	199,019	NA
Arrivals	↔	0.4%	18,882	18,962	NA
Daily Census	↓	-0.1%	817	816	NA
Airlift (scheduled seats)^		N/A	N/A	N/A	N/A

\*DBEDT 2023 annual forecast (Quarter 3, 2024). N/A=Not available

**Table 24: Key Performance Indicators – Latin America (Year-to-Date Aug. 2024P vs. Year-to-Date Aug. 2019)**

		YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↑	20.8%	40.3	48.7	NA
Daily Spend (\$PPPD)	↑	12.8%	216.8	244.5	NA
Visitor Days	↔	7.1%	185,792	199,019	NA
Arrivals	↔	8.7%	17,441	18,962	NA
Daily Census	↔	6.7%	765	816	NA
Airlift (scheduled seats)^		N/A	N/A	N/A	N/A

\*DBEDT 2023 annual forecast (Quarter 3, 2024). N/A=Not available

## ISLAND VISITATION:

- **O'ahu:** In the first eight months of 2024, there were 3,933,882 visitors to O'ahu, compared to 3,772,745 visitors (+4.3%) in the first eight months of 2023 and 4,199,292 visitors (-6.3%) in the first eight months of 2019. For the first eight months of 2024, total visitor spending was \$6.28 billion, which was higher than \$6.04 billion (+3.9%) in the first eight months of 2023 and \$5.51 billion (+14.0%) in the first eight months of 2019.
- **Maui:** In the first eight months of 2024, there were 1,574,325 visitors to Maui, compared to 1,907,527 visitors (-17.5%) in the first eight months of 2023 and 2,104,005 visitors (-25.2%) in the first eight months of 2019. For the first eight months of 2024, total visitor spending was \$3.52 billion, compared to \$4.41 billion (-20.3%) in the first eight months of 2023 and \$3.52 billion (0.0%) in the first eight months of 2019.
- **Hawai'i Island:** In the first eight months of 2024, there were 1,182,579 visitors to Hawai'i Island, compared to 1,212,746 visitors (-2.5%) in the first eight months of 2023 and 1,211,805 visitors (-2.4%) in the first eight months of 2019. For the first eight months of 2024, total visitor spending was \$2.15 billion, compared to \$1.96 billion (+9.5%) in the first eight months of 2023 and \$1.57 billion (+36.9%) in the first eight months of 2019.
- **Kaua'i:** In the first eight months of 2024, there were 936,477 visitors to Kaua'i, compared to 964,000 visitors (-2.9%) in the first eight months of 2023 and 945,726 visitors (-1.0%) in the first eight months of 2019. For the first eight months of 2024, total visitor spending was \$1.97 billion, compared to \$1.82 billion (+7.9%) in the first eight months of 2023 and \$1.32 billion (+48.4%) in the first eight months of 2019.



HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **OVERALL**

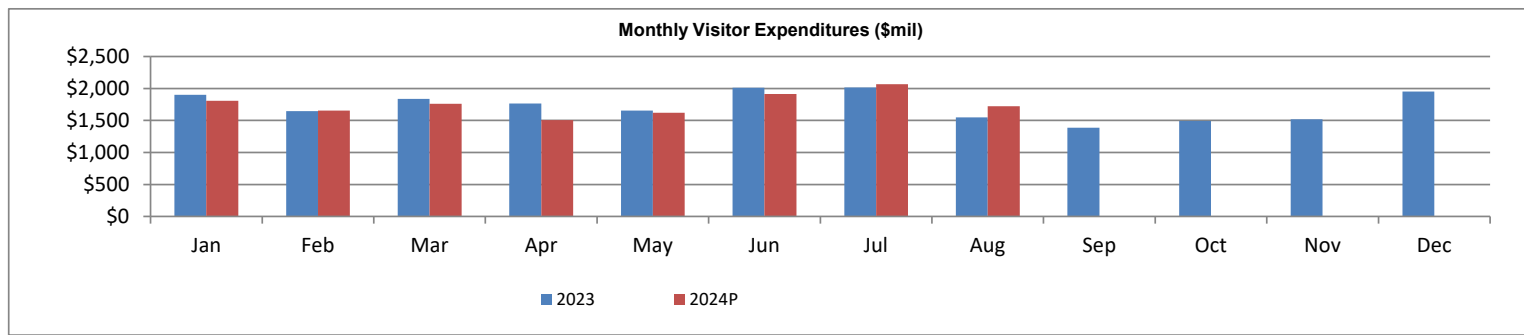
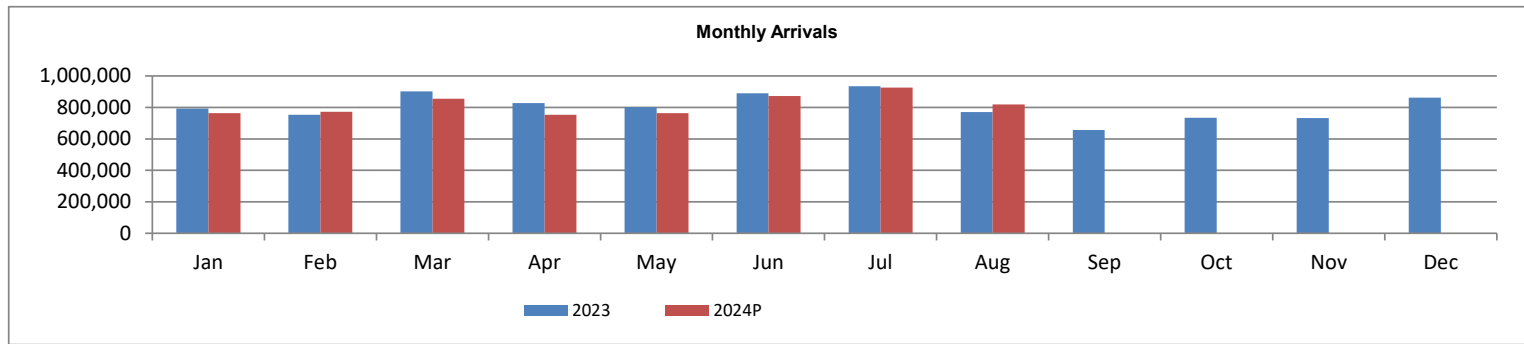
Key Performance Indicators

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	🔻	14,385.7	14,055.9	20,593.7	O'ahu	4.3%	3,933,882
Daily Spend (\$PPPD)	🔻	239.6	245.3	244.0	Maui	-17.5%	1,574,325
Visitor Days	🔻	60,040,776	57,291,798	84,392,803	Moloka'i	-2.6%	22,300
Arrivals	🔻	6,671,951	6,526,015	9,564,557	Lāna'i	-17.8%	32,238
Daily Census	🔻	247,081	234,802	230,581	Kaua'i	-2.9%	936,477
Airlift (scheduled seats)^	🔻	8,936,164	8,963,440	13,290,542	Hawai'i Island	-2.5%	1,182,579

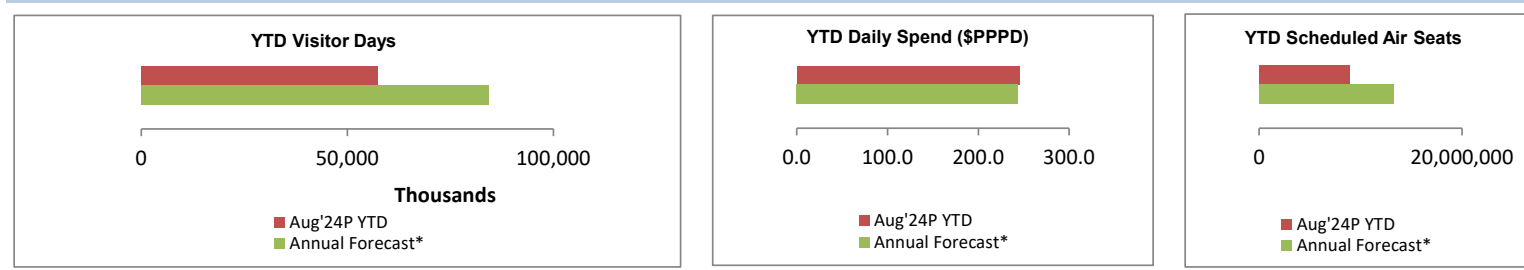
\* DBEDT Annual Forecast as of Q3 2024.

^ DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **U.S. TOTAL**

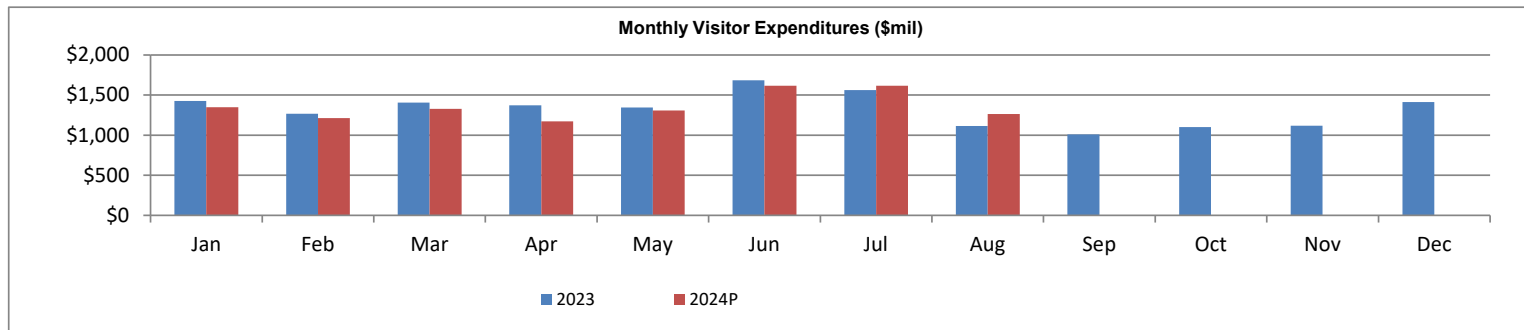
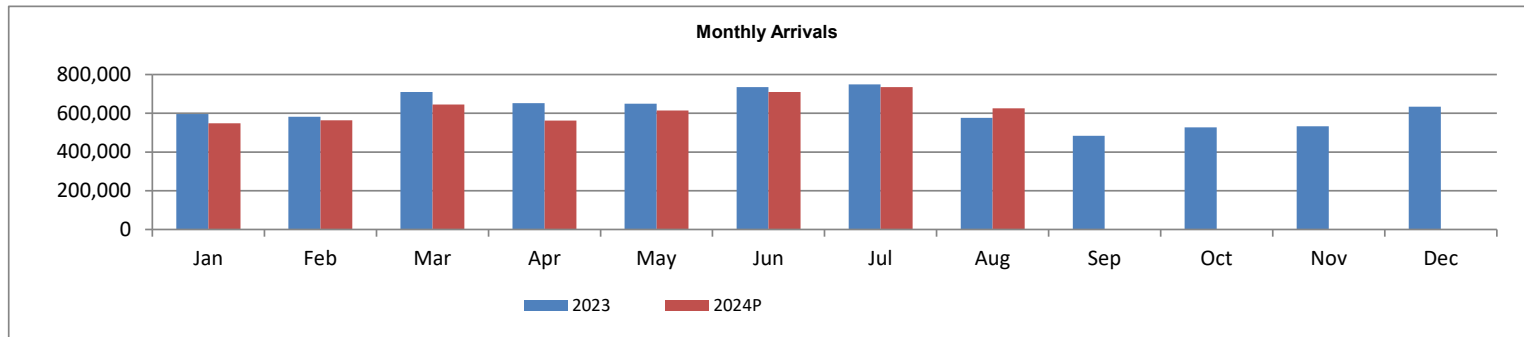
Key Performance Indicators

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↘ -2.9%	11,182.6	10,861.6	15,794.7	O'ahu	0.4%	2,715,290
Daily Spend (\$PPPD)	↘ 3.0%	238.8	245.9	244.2	Maui	-16.7%	1,341,562
Visitor Days	↘ -5.7%	46,822,940	44,170,850	64,673,205	Moloka'i	-2.4%	16,263
Arrivals	↘ -4.7%	5,249,278	5,003,214	7,268,850	Lāna'i	-14.6%	24,491
Daily Census	↘ -6.1%	192,687	181,028	176,703	Kaua'i	-2.8%	830,492
Airlift (scheduled seats) <sup>^</sup>	↘ -3.0%	7,381,399	7,162,278	10,600,428	Hawai'i Island	-4.0%	973,680

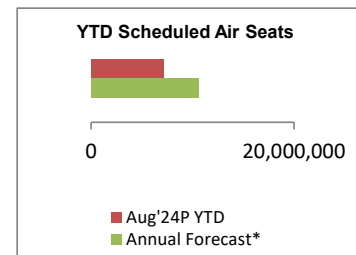
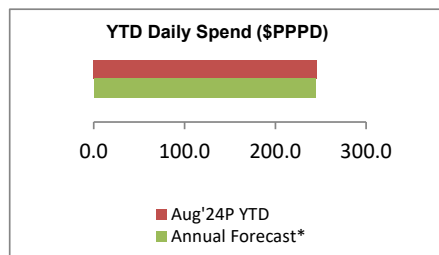
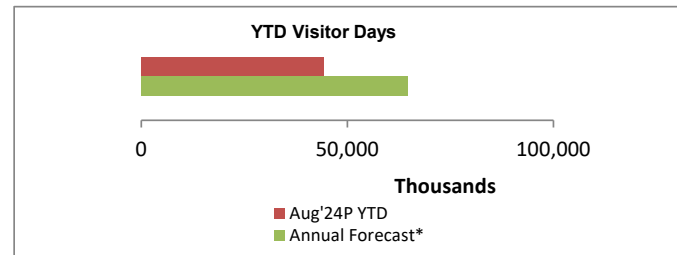
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **U.S. WEST**

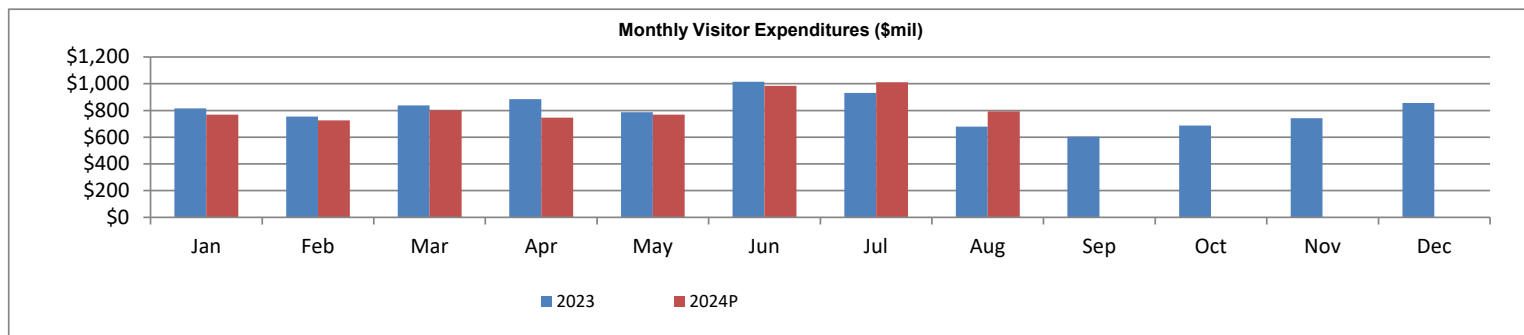
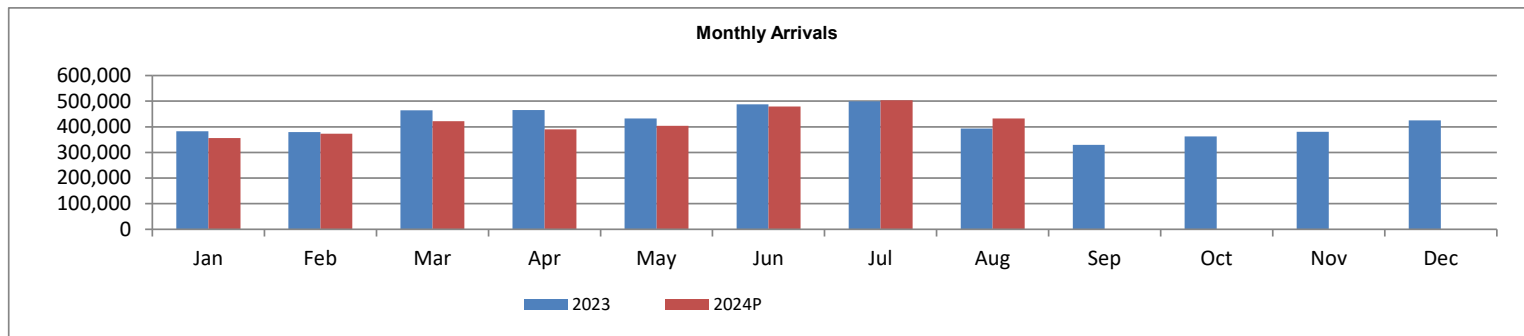
Key Performance Indicators

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↘ -1.6%	6,704.1	6,598.6	9,606.9	O'ahu	1.9%	1,702,153
Daily Spend (\$PPPD)	↘ 3.8%	225.3	233.8	232.1	Maui	-15.6%	870,260
Visitor Days	↘ -5.1%	29,755,398	28,228,265	41,385,615	Moloka'i	1.4%	9,583
Arrivals	↘ -4.1%	3,503,091	3,360,563	4,880,379	Lāna'i	-11.3%	13,555
Daily Census	↘ -5.5%	122,450	115,690	113,075	Kaua'i	-3.0%	532,655
Airlift (scheduled seats) <sup>^</sup>	↘ -2.5%	6,515,682	6,353,810	9,400,915	Hawai'i Island	-3.8%	609,542

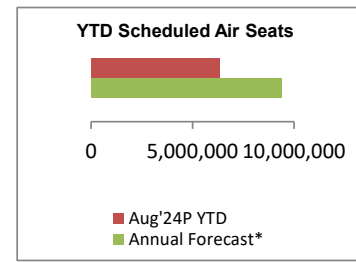
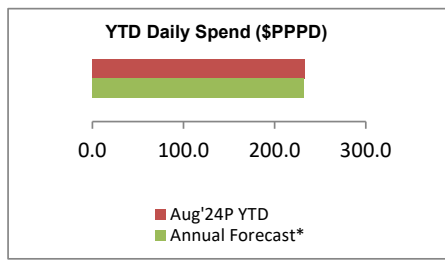
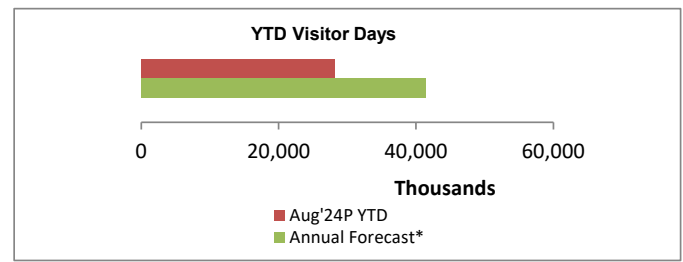
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **U.S. EAST**

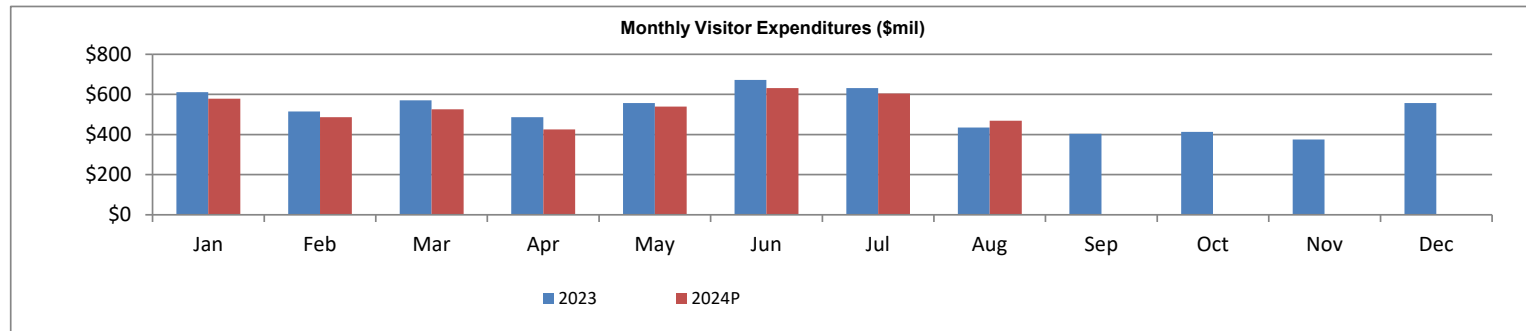
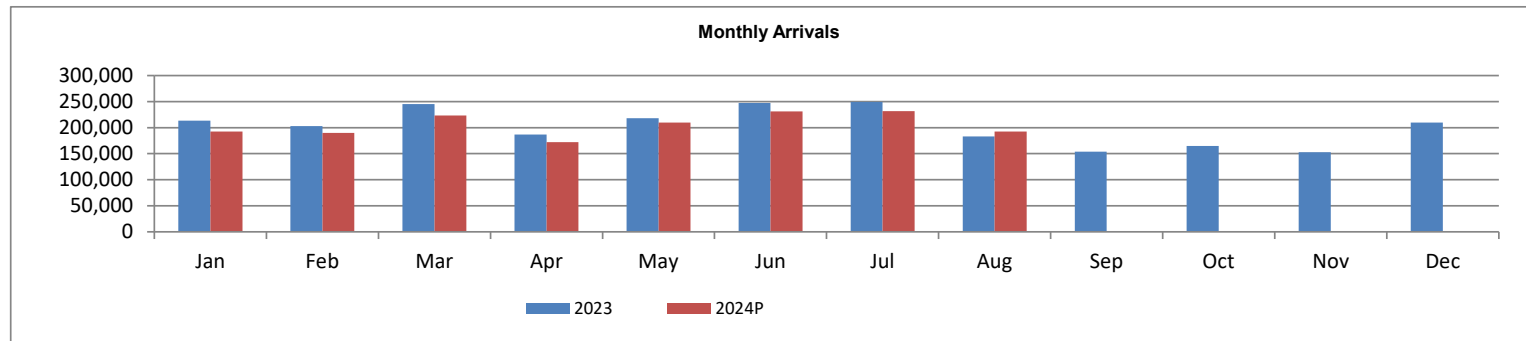
Key Performance Indicators

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	🔻	4,478.5	4,263.0	6,187.8	O'ahu	-2.2%	1,013,137
Daily Spend (\$PPPD)	🔻	262.4	267.4	265.7	Maui	-18.8%	471,301
Visitor Days	🔻	17,067,542	15,942,585	23,287,590	Moloka'i	-7.4%	6,680
Arrivals	🔻	1,746,187	1,642,651	2,388,471	Lāna'i	-18.3%	10,936
Daily Census	🔻	70,237	65,338	63,627	Kaua'i	-2.5%	297,837
Airlift (scheduled seats) <sup>^</sup>	🔻	865,717	808,468	1,199,513	Hawai'i Island	-4.3%	364,139

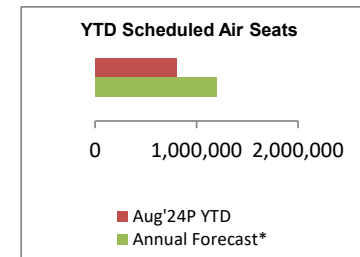
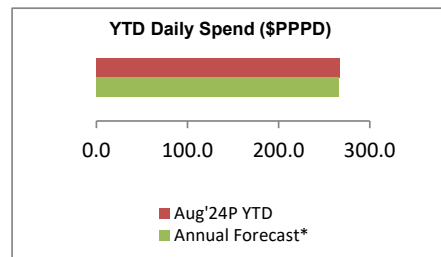
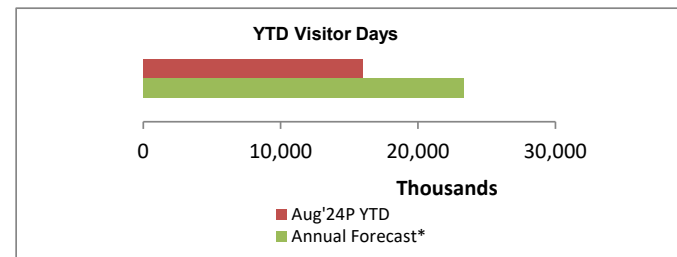
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **JAPAN**

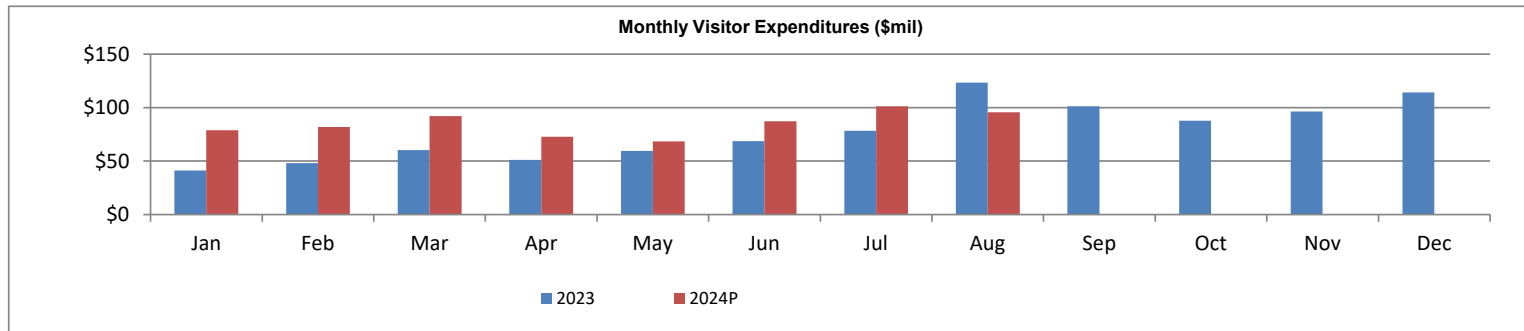
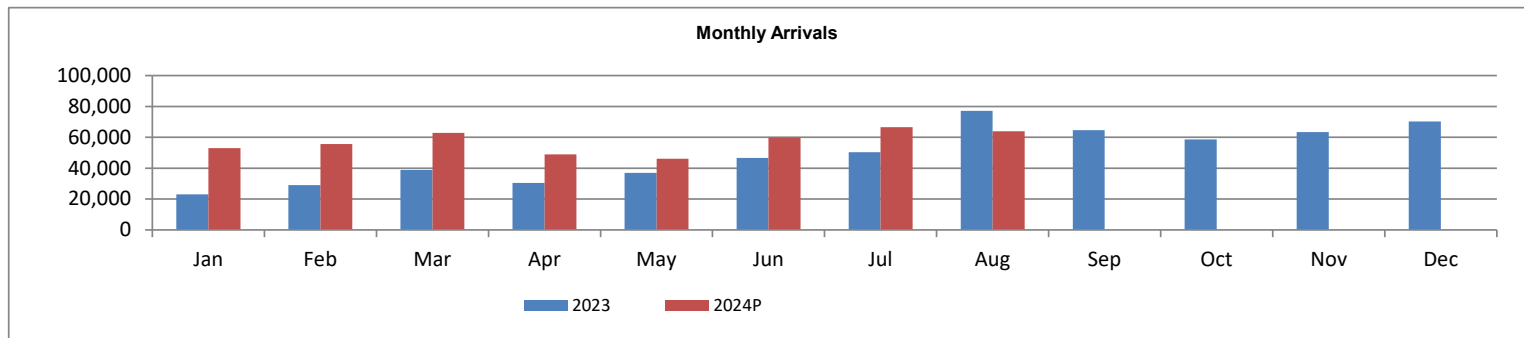
Key Performance Indicators

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↑ 27.8%	530.7	678.3	1,070.5	O'ahu	38.8%	446,767
Daily Spend (\$PPPD)	↔ 0.3%	237.2	237.8	241.9	Mauī	27.0%	8,849
Visitor Days	↑ 27.5%	2,237,219	2,852,350	4,424,958	Moloka'i	39.7%	504
Arrivals	↑ 37.6%	332,222	457,081	717,173	Lāna'i	5.2%	311
Daily Census	↑ 27.0%	9,207	11,690	12,090	Kaua'i	22.3%	4,385
Airlift (scheduled seats) <sup>^</sup>	↑ 44.4%	645,805	932,484	1,384,543	Hawai'i Island	17.8%	32,383

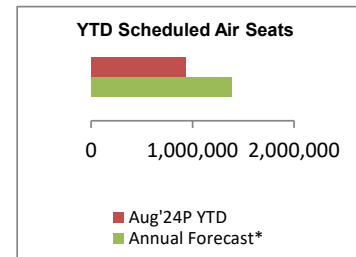
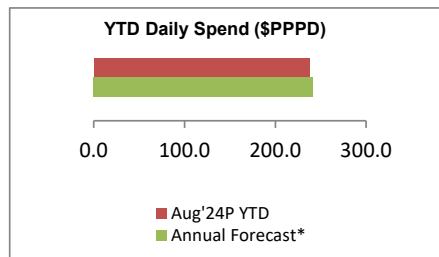
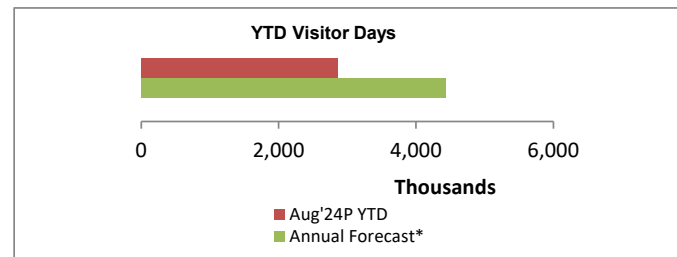
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **CANADA**

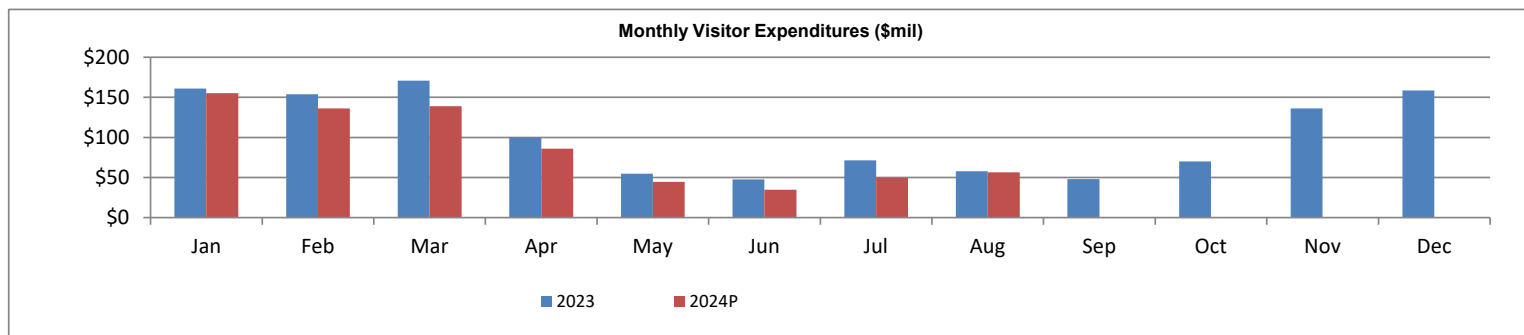
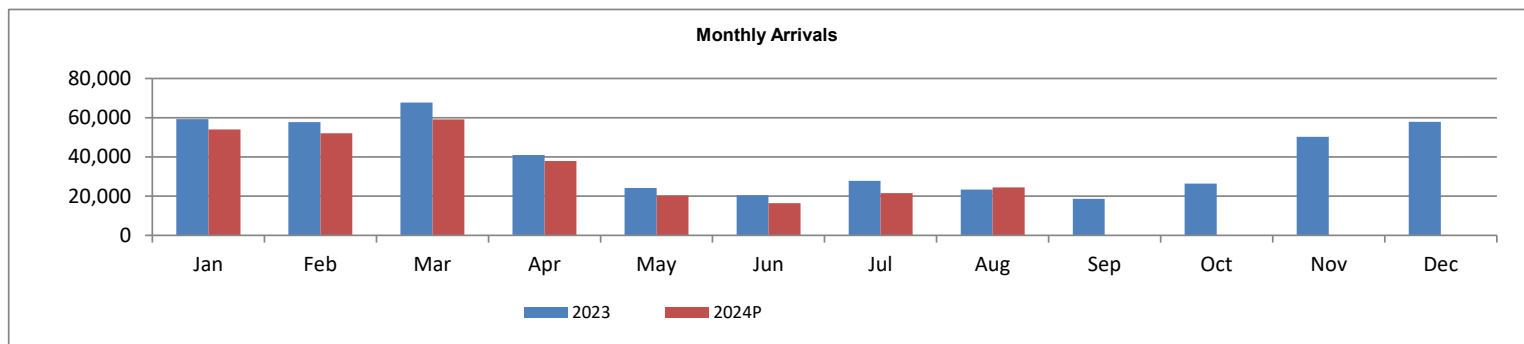
Key Performance Indicators

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -14.1%	817.4	702.2	1,093.6	O'ahu	-0.7%	161,750
Daily Spend (\$PPPD)	↔ 2.0%	216.9	221.2	223.7	Mauī	-32.4%	105,765
Visitor Days	↓ -15.8%	3,769,217	3,174,511	4,887,902	Moloka'i	-14.9%	1,681
Arrivals	↓ -11.1%	321,569	285,842	432,558	Lāna'i	-52.2%	1,402
Daily Census	↓ -16.1%	15,511	13,010	13,355	Kaua'i	-17.4%	30,274
Airlift (scheduled seats) <sup>^</sup>	↓ -11.1%	319,009	283,546	420,651	Hawai'i Island	-14.1%	49,702

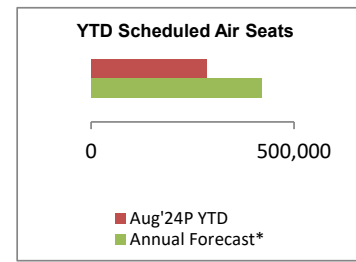
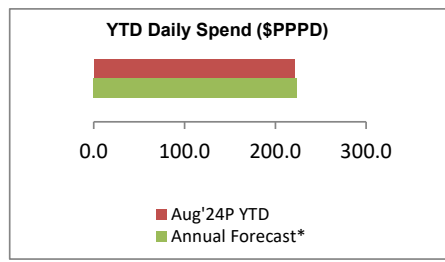
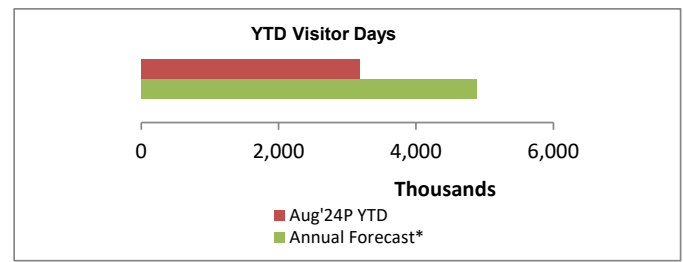
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **OCEANIA**

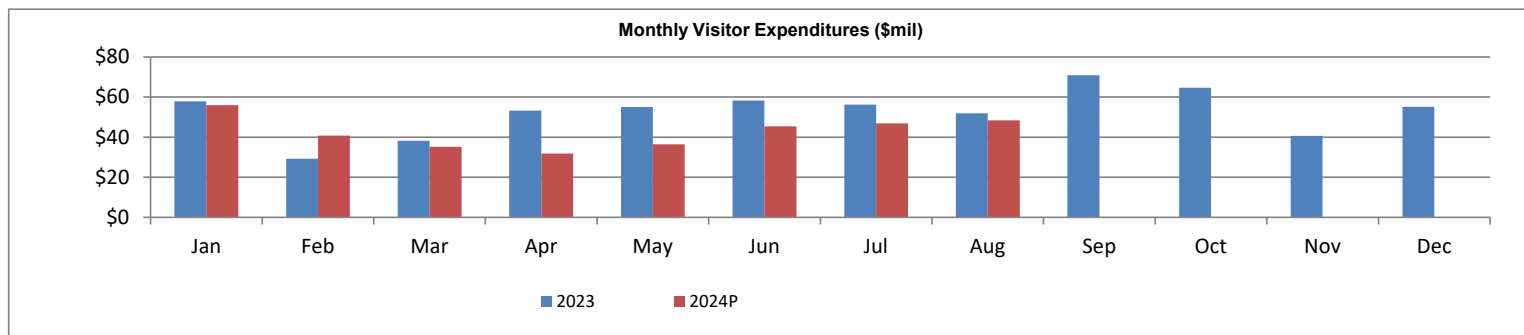
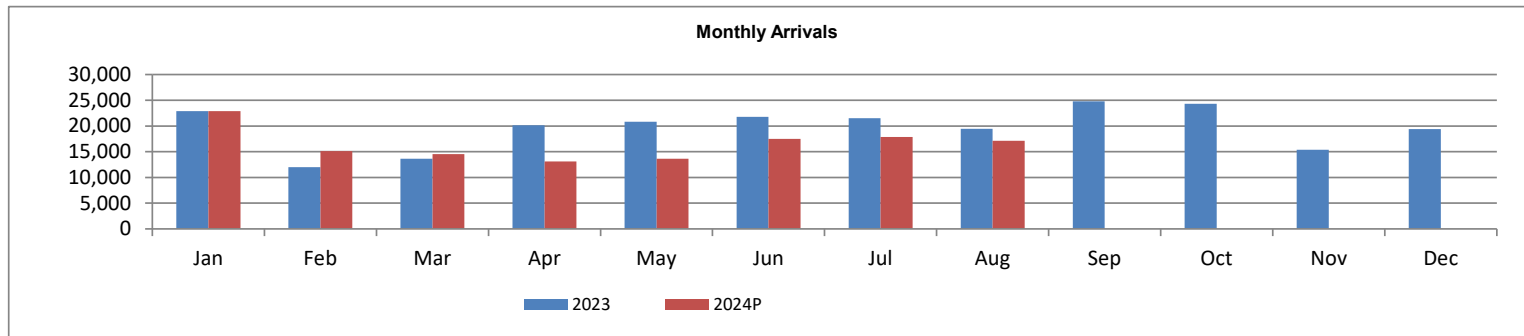
Key Performance Indicators

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -14.8%	399.9	340.8	545.8	O'ahu	-13.8%	128,971
Daily Spend (\$PPPD)	↔ 0.4%	292.7	293.9	297.1	Mauī	-22.4%	13,271
Visitor Days	↓ -15.1%	1,366,342	1,159,640	1,837,054	Moloka'i	11.0%	1,220
Arrivals	↓ -13.5%	152,281	131,769	208,756	Lāna'i	-1.1%	1,348
Daily Census	↓ -15.5%	5,623	4,753	5,019	Kaua'i	8.9%	9,812
Airlift (scheduled seats) <sup>^</sup>	↓ -11.0%	219,427	195,326	296,106	Hawai'i Island	-5.6%	13,693

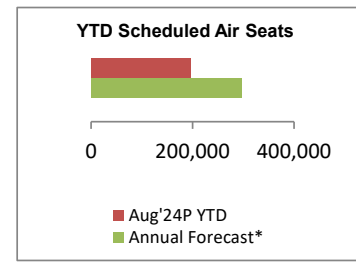
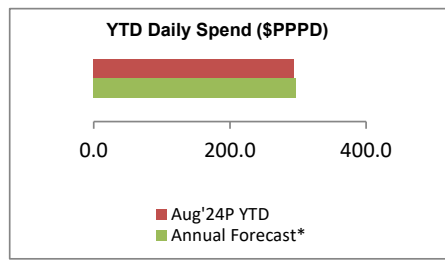
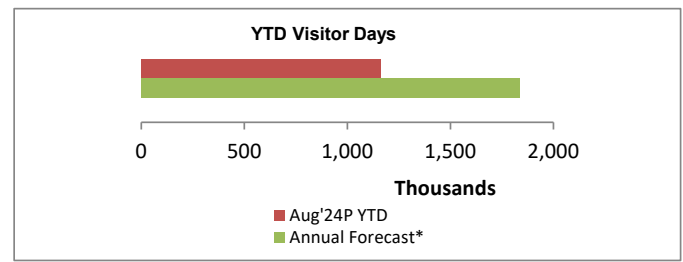
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **OTHER ASIA**

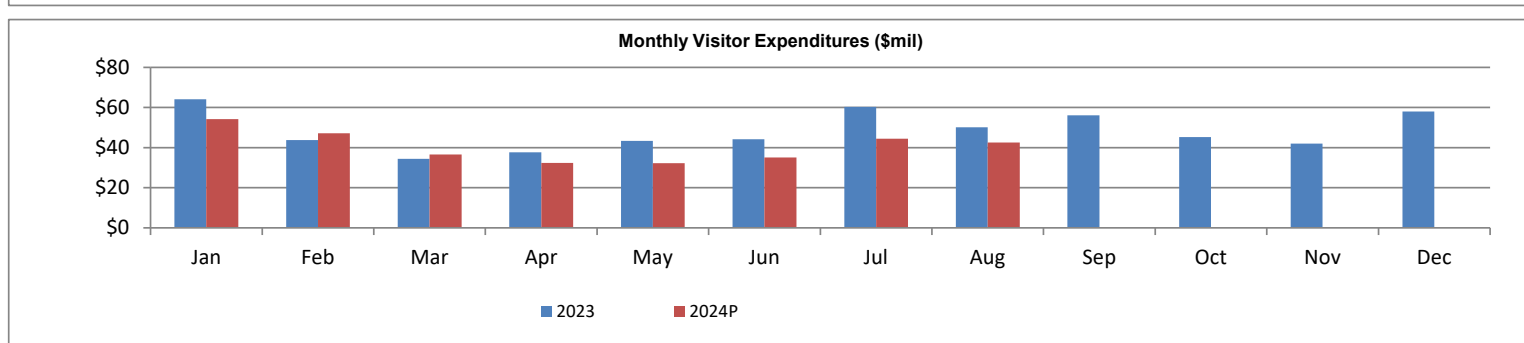
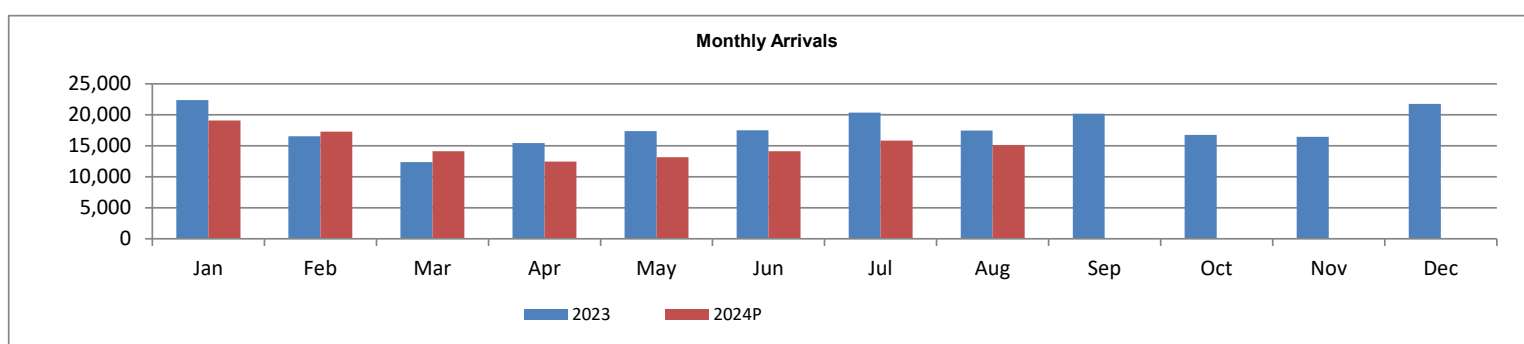
Key Performance Indicators

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -14.2%	378.0	324.5	NA	O'ahu	-13.5%	116,722
Daily Spend (\$PPPD)	↔ 2.2%	311.0	317.7	NA	Mau	-57.3%	6,632
Visitor Days	↓ -16.0%	1,215,706	1,021,411	NA	Moloka'i	26.3%	308
Arrivals	↓ -13.1%	139,404	121,179	NA	Lāna'i	-43.1%	305
Daily Census	↓ -16.3%	5,003	4,186	NA	Kaua'i	-11.2%	4,448
Airlift (scheduled seats) <sup>^</sup>	↔ 3.2%	186,229	192,221	277,962	Hawai'i Island	-8.1%	23,459

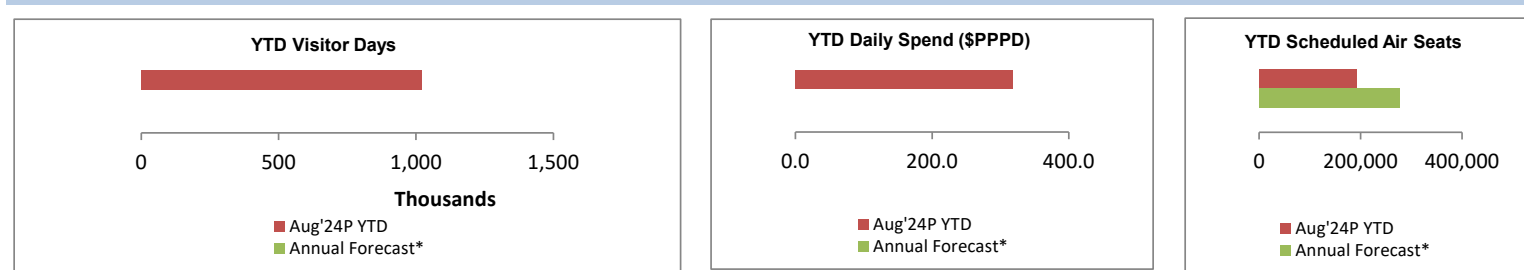
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures



HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **KOREA**

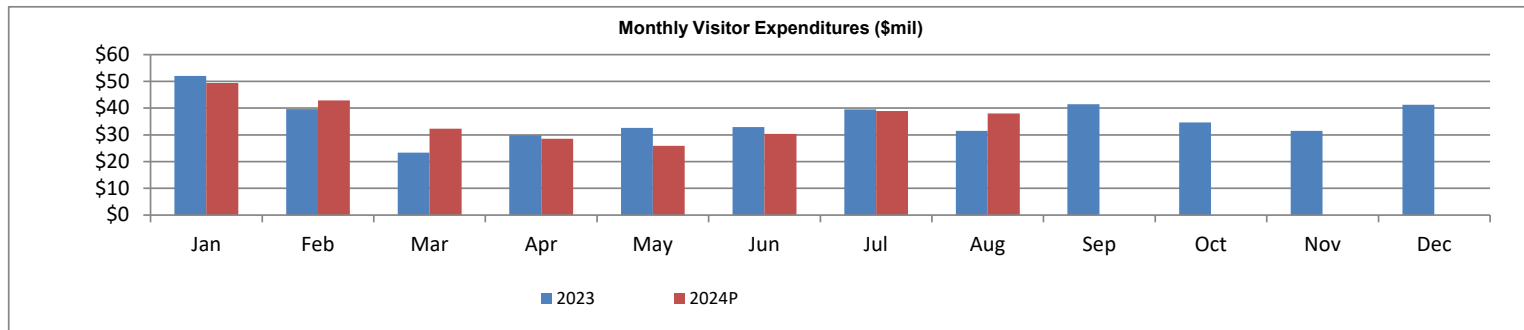
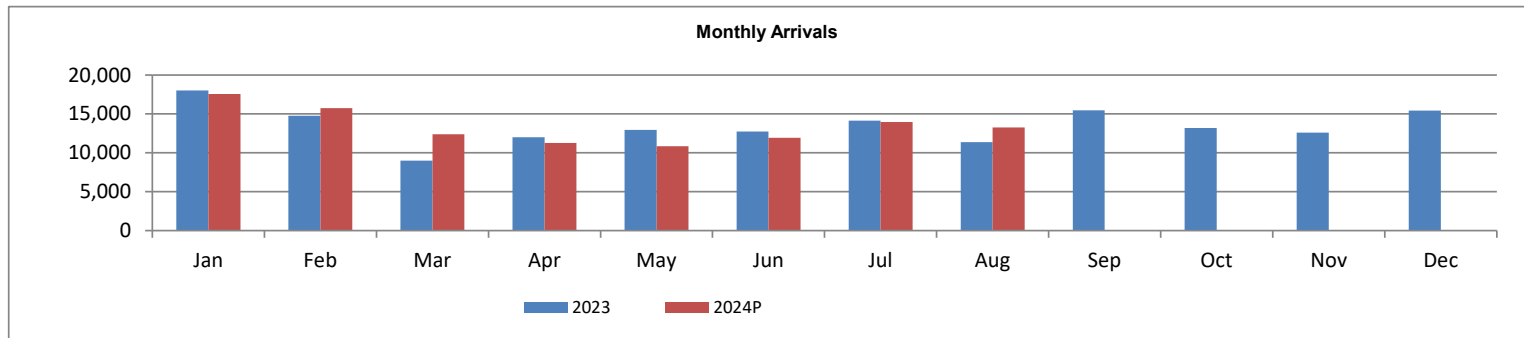
Key Performance Indicators

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↗	281.4	286.2	440.7	O'ahu	1.2%	104,848
Daily Spend (\$PPPD)	↗	310.4	313.9	319.6	Mau	-48.9%	4,563
Visitor Days	↗	906,588	911,983	1,378,778	Moloka'i	77.1%	256
Arrivals	↗	104,988	106,948	162,209	Lāna'i	-63.1%	171
Daily Census	↗	3,731	3,738	3,767	Kaua'i	0.4%	3,444
Airlift (scheduled seats) <sup>^</sup>	↗	186,229	192,221	277,962	Hawai'i Island	12.1%	19,845

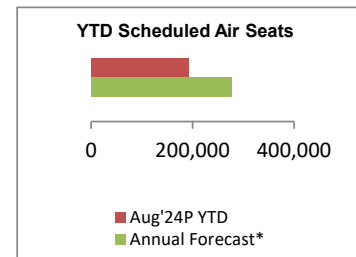
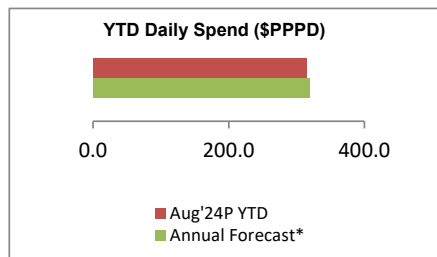
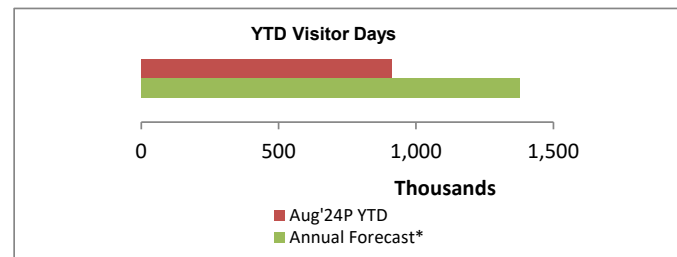
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **CHINA**

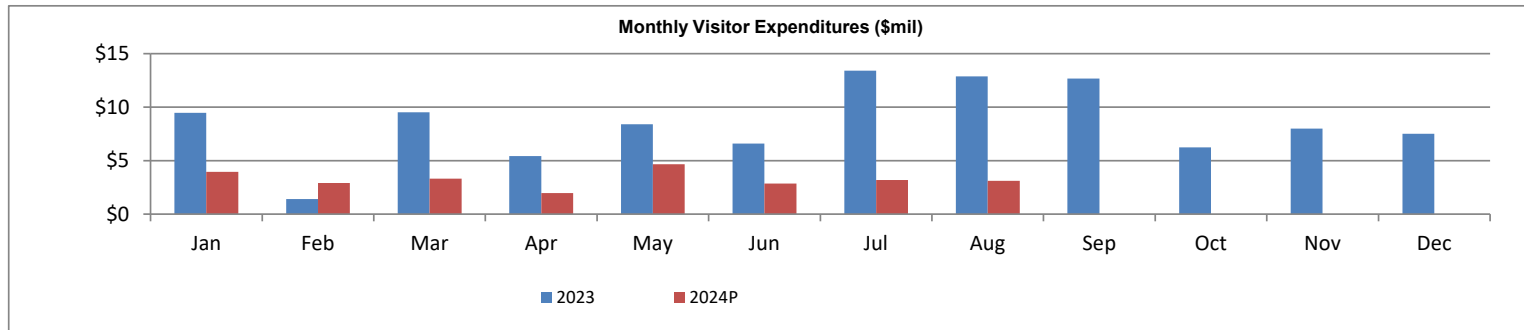
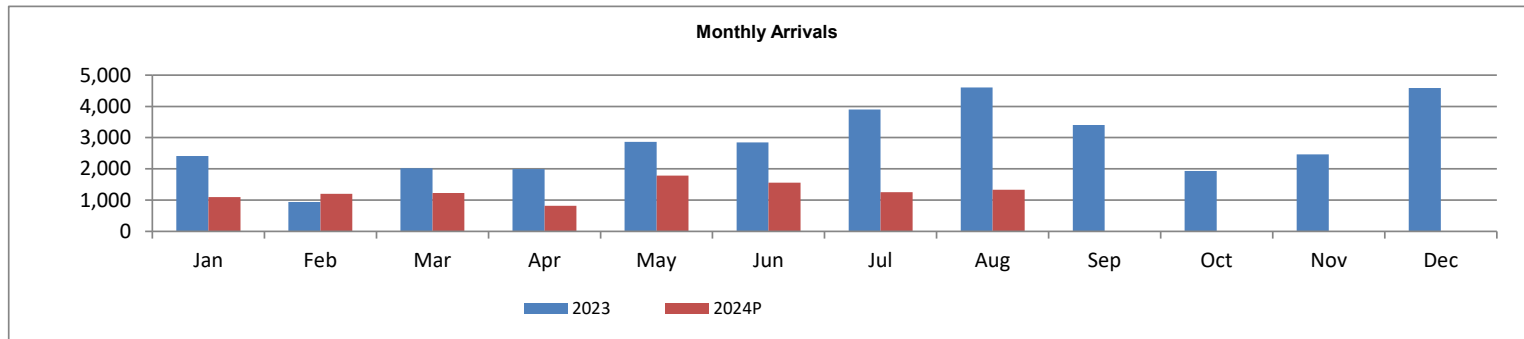
Key Performance Indicators

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -61.3%	67.1	26.0	NA	O'ahu	-55.0%	8,985
Daily Spend (\$PPPD)	↔ -3.2%	363.9	352.2	NA	Maui	-71.0%	1,306
Visitor Days	↓ -60.0%	184,299	73,726	NA	Moloka'i	94.9%	35
Arrivals	↓ -52.4%	21,574	10,275	NA	Lāna'i	98.2%	108
Daily Census	↓ -60.2%	758	302	NA	Kaua'i	-32.8%	602
Airlift (scheduled seats) <sup>^</sup>	N/A	N/A	N/A	N/A	Hawai'i Island	-48.7%	2,809

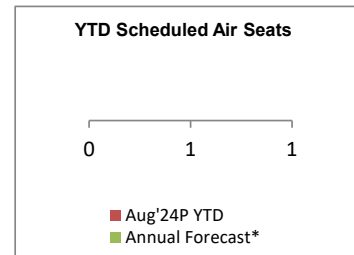
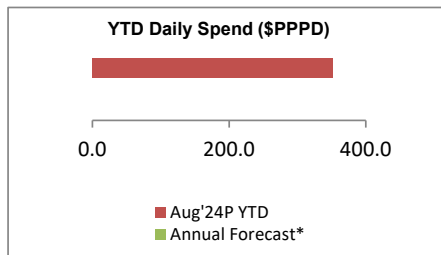
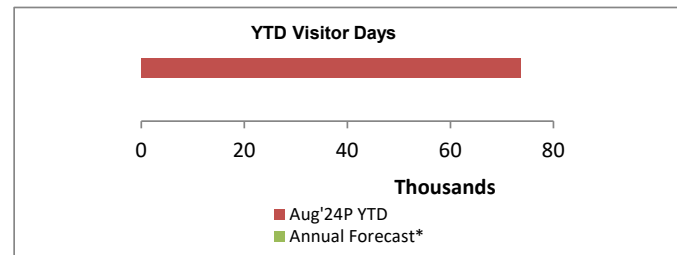
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **EUROPE**

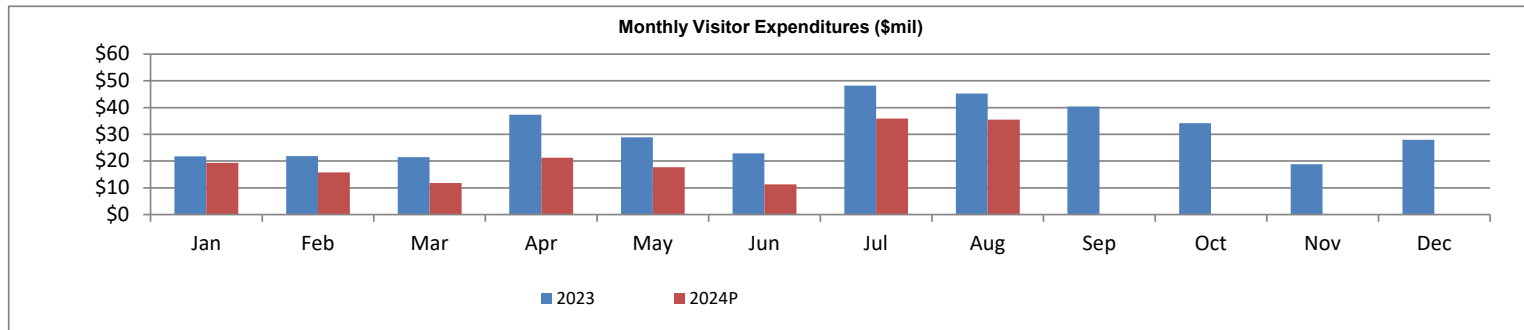
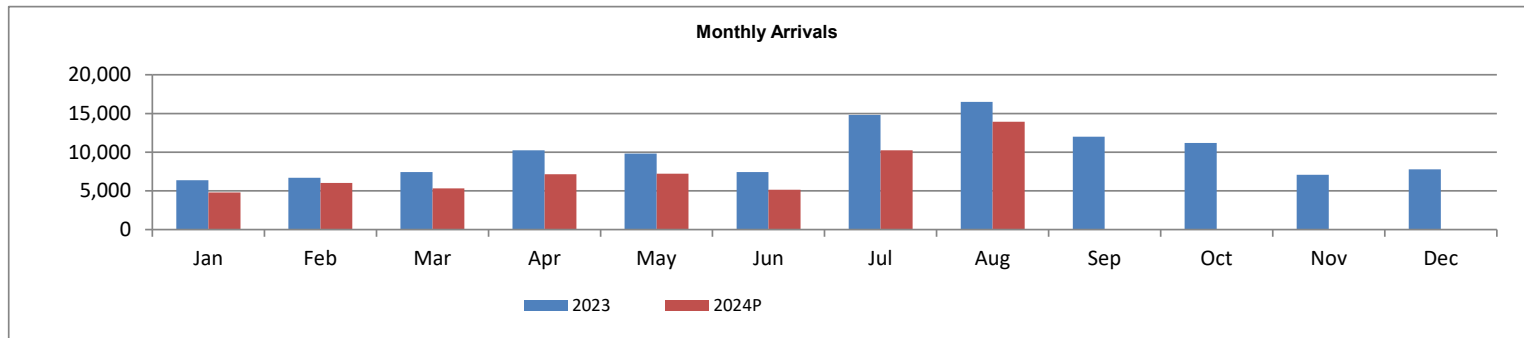
Key Performance Indicators

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -32.0%	247.7	168.4	261.9	O'ahu	-25.0%	46,585
Daily Spend (\$PPPD)	↓ -11.7%	242.6	214.2	227.5	Maui	-32.2%	19,648
Visitor Days	↓ -23.0%	1,020,834	786,230	1,150,933	Moloka'i	-43.9%	397
Arrivals	↓ -24.5%	79,232	59,810	85,571	Lāna'i	-75.3%	267
Daily Census	↓ -23.3%	4,201	3,222	3,145	Kaua'i	-19.7%	14,710
Airlift (scheduled seats) <sup>^</sup>	N/A	N/A	N/A	N/A	Hawai'i Island	-21.9%	18,747

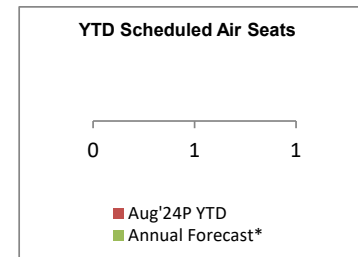
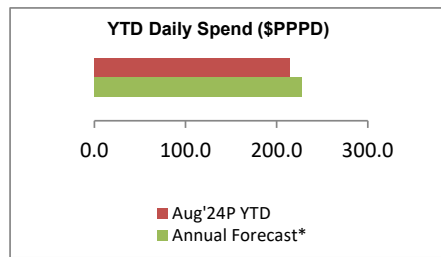
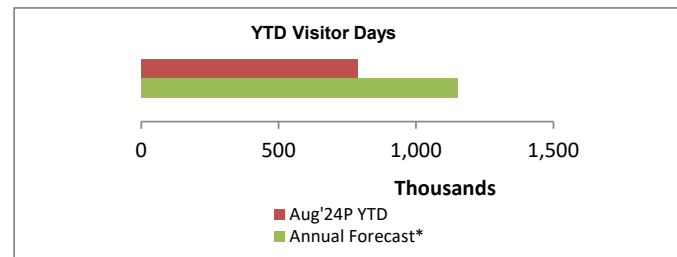
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **LATIN AMERICA**

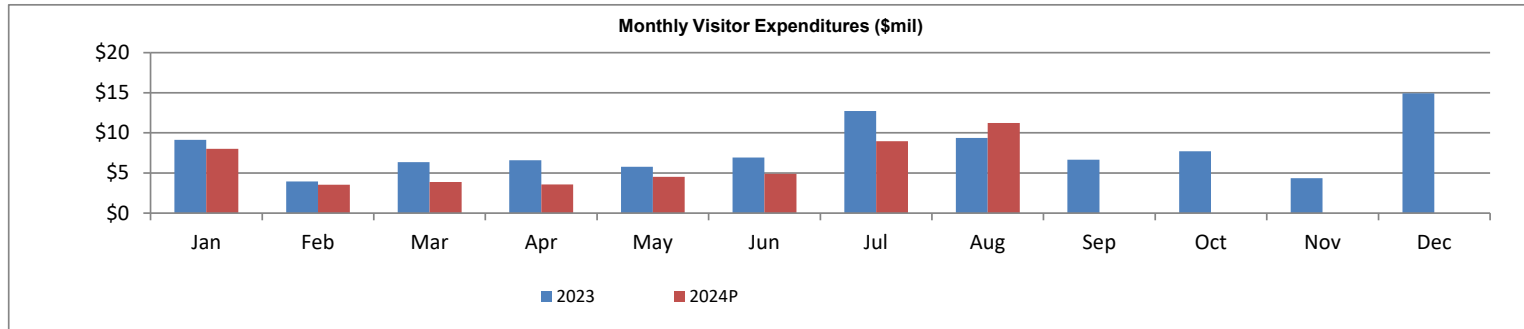
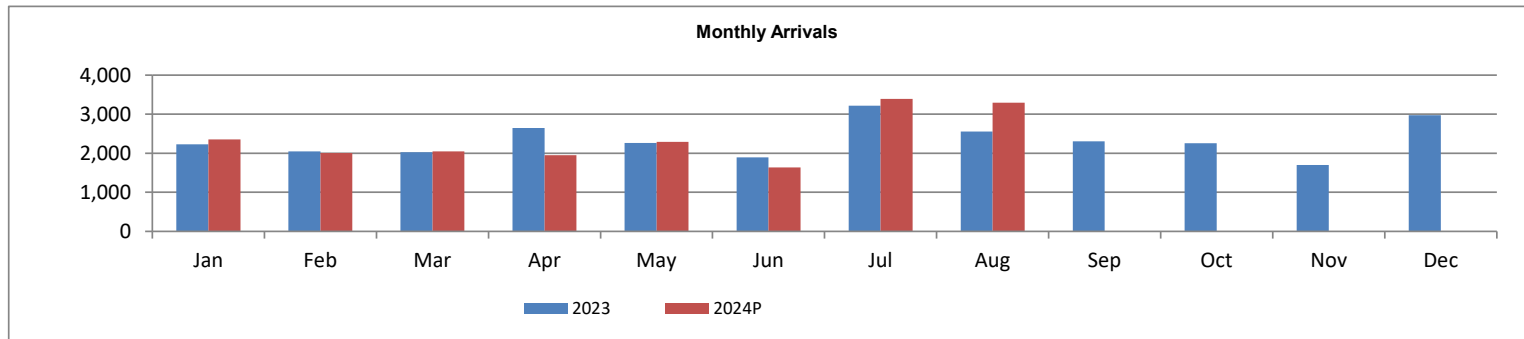
Key Performance Indicators

	YOY Rate	Aug'23 YTD	Aug'24P YTD	Annual Forecast*		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓	-19.9%	60.8	48.7	NA	O'ahu	2.4%	14,165
Daily Spend (\$PPPD)	↓	-20.2%	306.2	244.5	NA	Maui	-13.8%	5,441
Visitor Days	↔	0.3%	198,428	199,019	NA	Moloka'i	-26.4%	74
Arrivals	↗	0.4%	18,882	18,962	NA	Lāna'i	-69.3%	107
Daily Census	↘	-0.1%	817	816	NA	Kaua'i	-0.9%	2,286
Airlift (scheduled seats) <sup>^</sup>		N/A	N/A	N/A	N/A	Hawai'i Island	2.7%	4,052

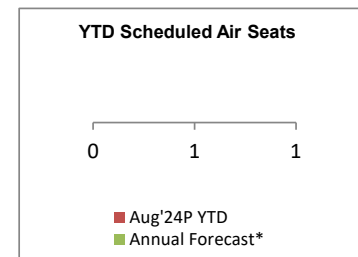
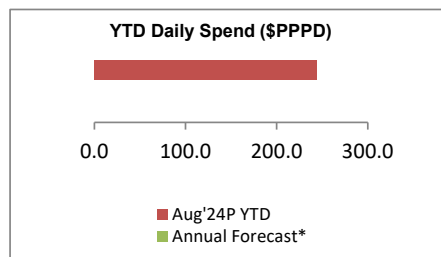
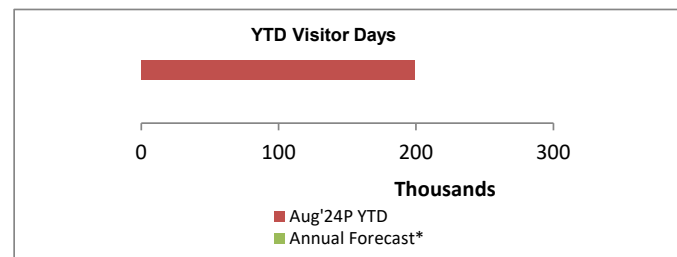
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **OVERALL**

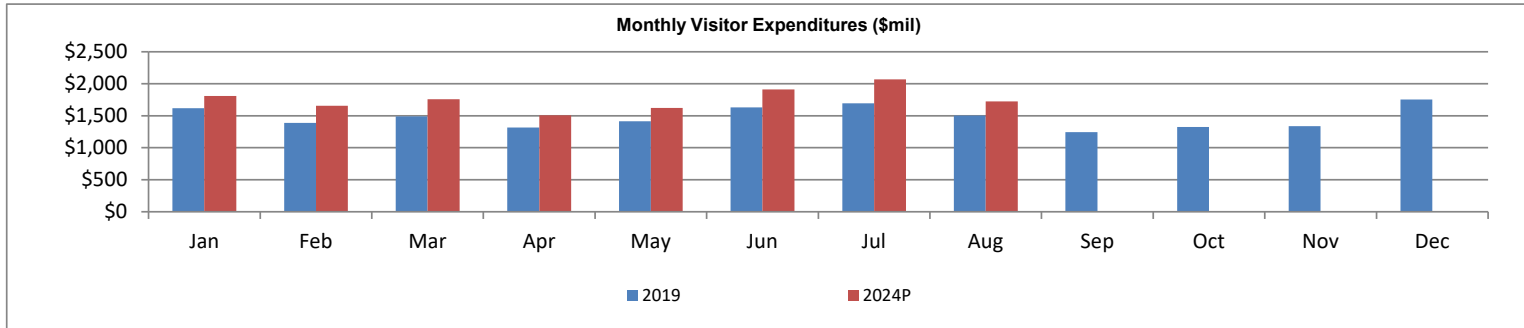
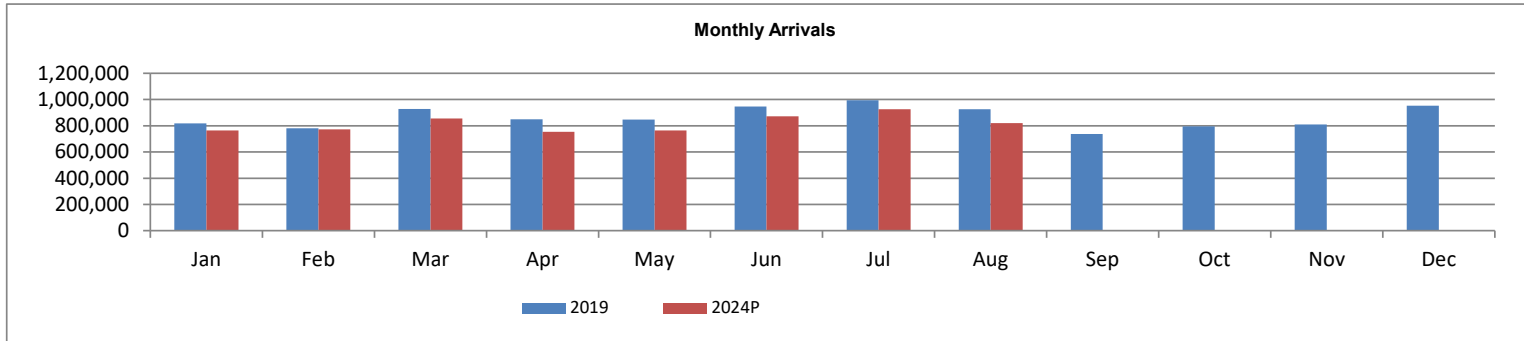
Key Performance Indicators

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↑ 16.6%	12,055.8	14,055.9	20,593.7	O'ahu	-6.3%	3,933,882
Daily Spend (\$PPPD)	↑ 26.1%	194.6	245.3	244.0	Maui	-25.2%	1,574,325
Visitor Days	↓ 7.5%	61,961,974	57,291,798	84,392,803	Moloka'i	-47.9%	22,300
Arrivals	↓ -8.0%	7,092,809	6,526,015	9,564,557	Lāna'i	-45.8%	32,238
Daily Census	↓ -7.9%	254,988	234,802	230,581	Kaua'i	-1.0%	936,477
Airlift (scheduled seats)^	↓ -2.1%	9,153,498	8,963,440	13,290,542	Hawai'i Island	-2.4%	1,182,579

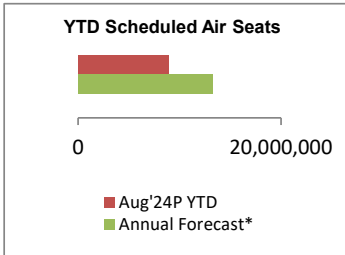
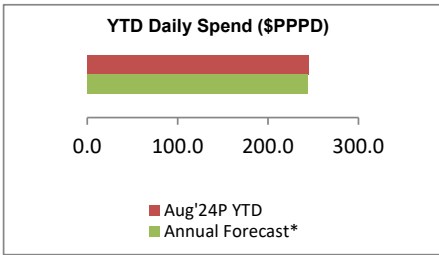
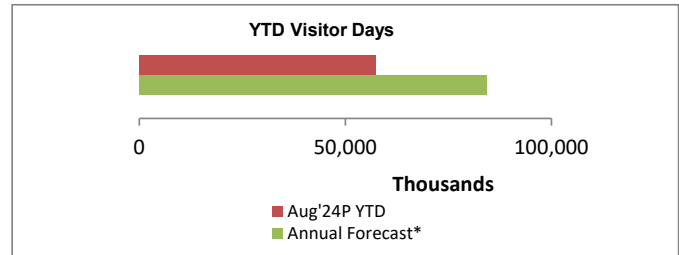
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^ DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **U.S. TOTAL**

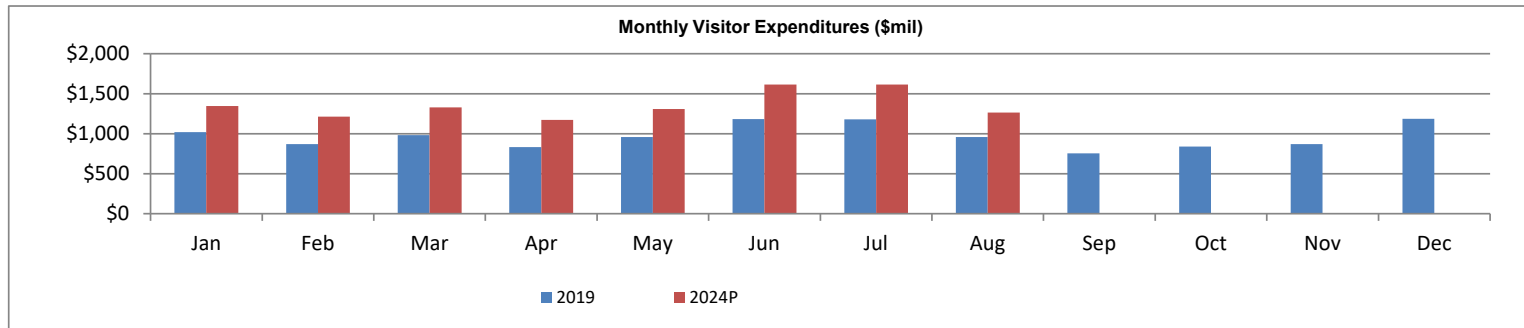
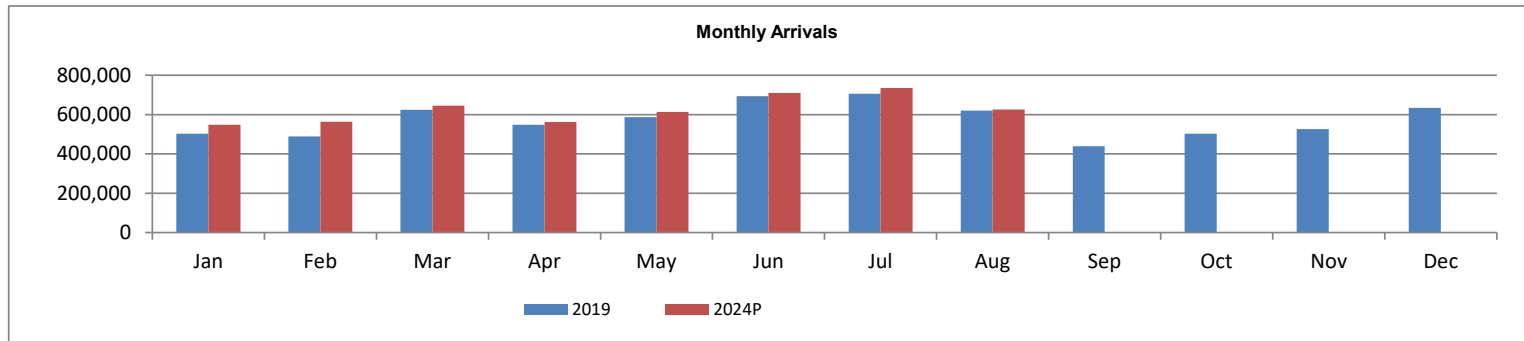
Key Performance Indicators

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↑ 36.0%	7,984.9	10,861.6	15,794.7	O'ahu	17.2%	2,715,290
Daily Spend (\$PPPD)	↑ 32.0%	186.3	245.9	244.2	Maui	-20.6%	1,341,562
Visitor Days	↔ 3.1%	42,851,073	44,170,850	64,673,205	Moloka'i	-45.0%	16,263
Arrivals	↔ 4.9%	4,771,257	5,003,214	7,268,850	Lāna'i	-41.1%	24,491
Daily Census	↔ 2.7%	176,342	181,028	176,703	Kaua'i	5.5%	830,492
Airlift (scheduled seats) <sup>^</sup>	↔ 8.3%	6,611,400	7,162,278	10,600,428	Hawai'i Island	11.7%	973,680

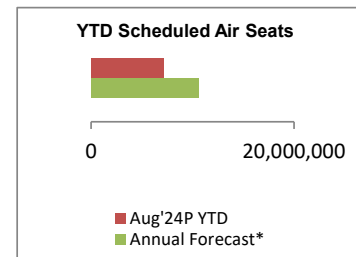
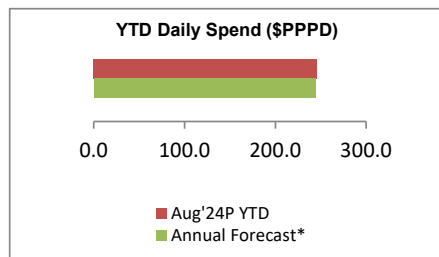
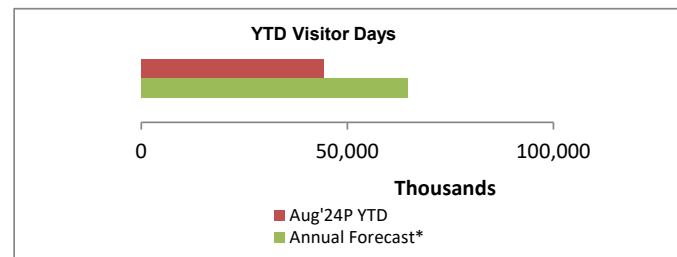
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DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **U.S. WEST**

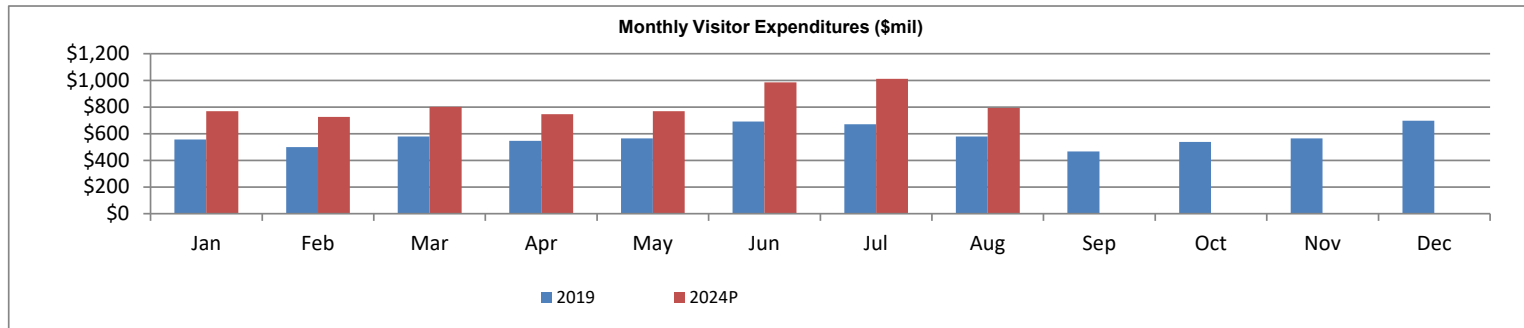
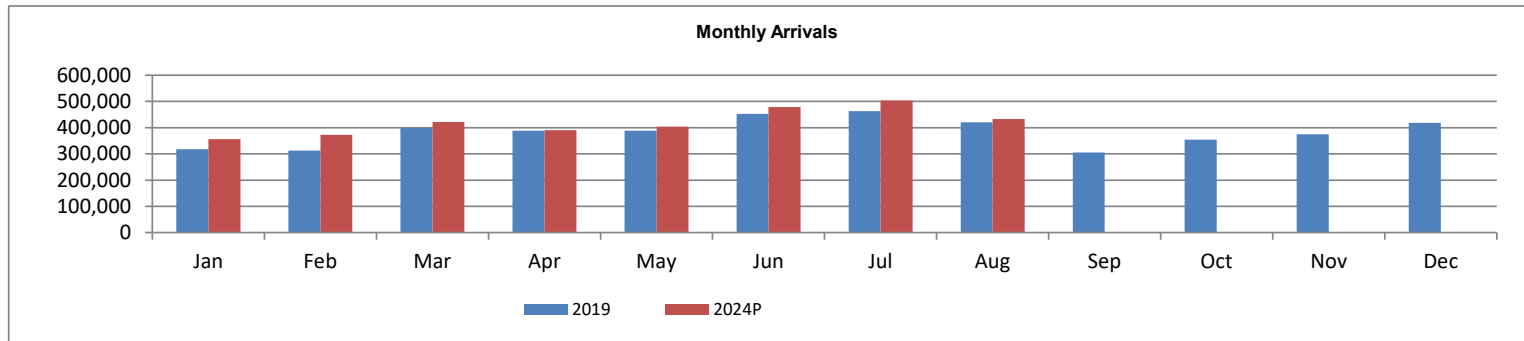
Key Performance Indicators

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↑ 40.8%	4,685.8	6,598.6	9,606.9	O'ahu	23.8%	1,702,153
Daily Spend (\$PPPD)	↑ 35.1%	173.0	233.8	232.1	Maui	-20.4%	870,260
Visitor Days	↔ 4.2%	27,089,212	28,228,265	41,385,615	Moloka'i	-45.4%	9,583
Arrivals	↔ 7.0%	3,141,739	3,360,563	4,880,379	Lāna'i	-35.3%	13,555
Daily Census	↔ 3.8%	111,478	115,690	113,075	Kaua'i	7.1%	532,655
Airlift (scheduled seats) <sup>^</sup>	↔ 10.0%	5,777,523	6,353,810	9,400,915	Hawai'i Island	13.3%	609,542

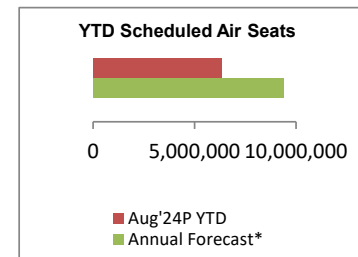
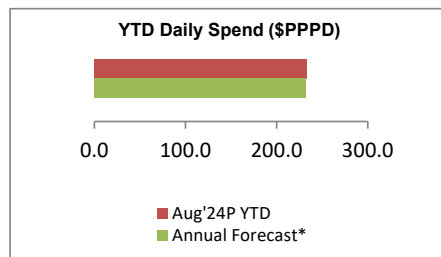
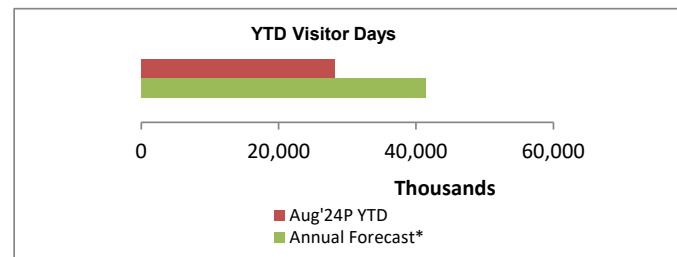
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DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **U.S. EAST**

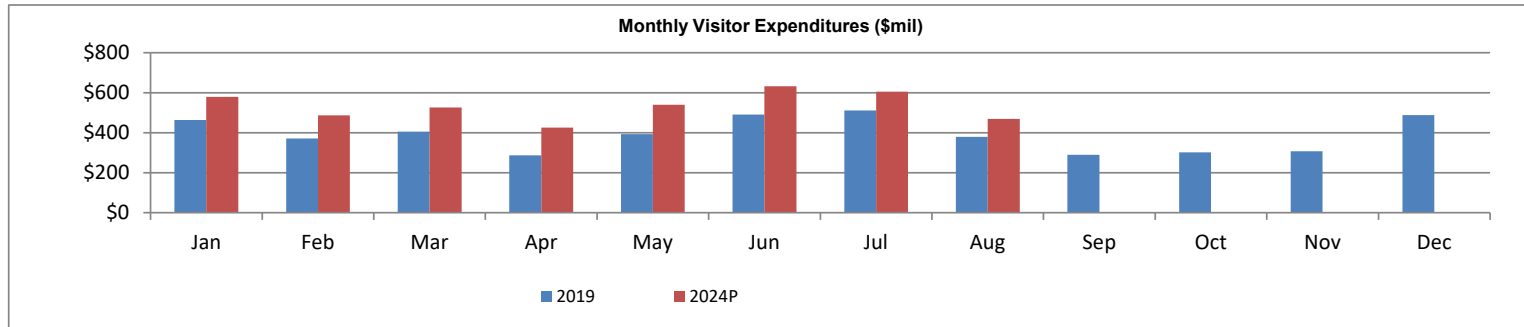
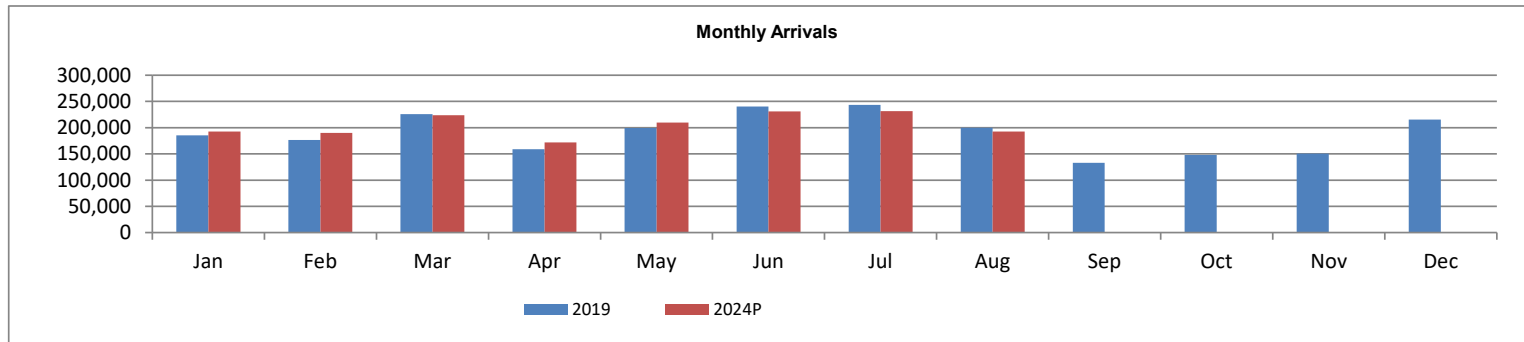
Key Performance Indicators

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↑ 29.2%	3,299.0	4,263.0	6,187.8	O'ahu	7.5%	1,013,137
Daily Spend (\$PPPD)	↑ 27.8%	209.3	267.4	265.7	Mauī	-20.9%	471,301
Visitor Days	↔ 1.1%	15,761,860	15,942,585	23,287,590	Moloka'i	-44.6%	6,680
Arrivals	↔ 0.8%	1,629,517	1,642,651	2,388,471	Lāna'i	-47.0%	10,936
Daily Census	↔ 0.7%	64,864	65,338	63,627	Kaua'i	2.6%	297,837
Airlift (scheduled seats) <sup>^</sup>	↓ -3.0%	833,877	808,468	1,199,513	Hawai'i Island	9.1%	364,139

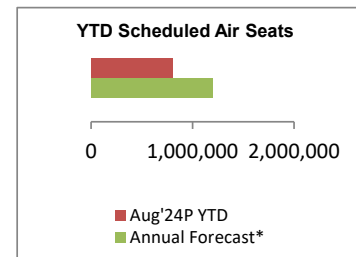
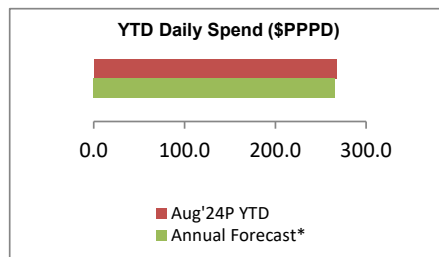
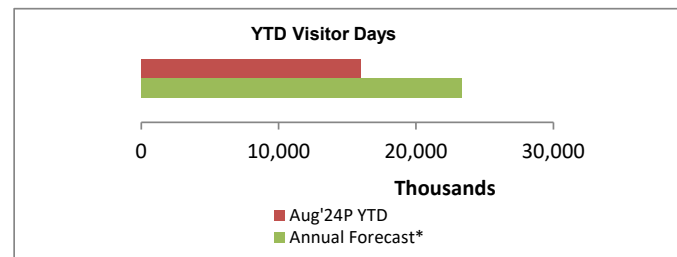
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures



HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **JAPAN**

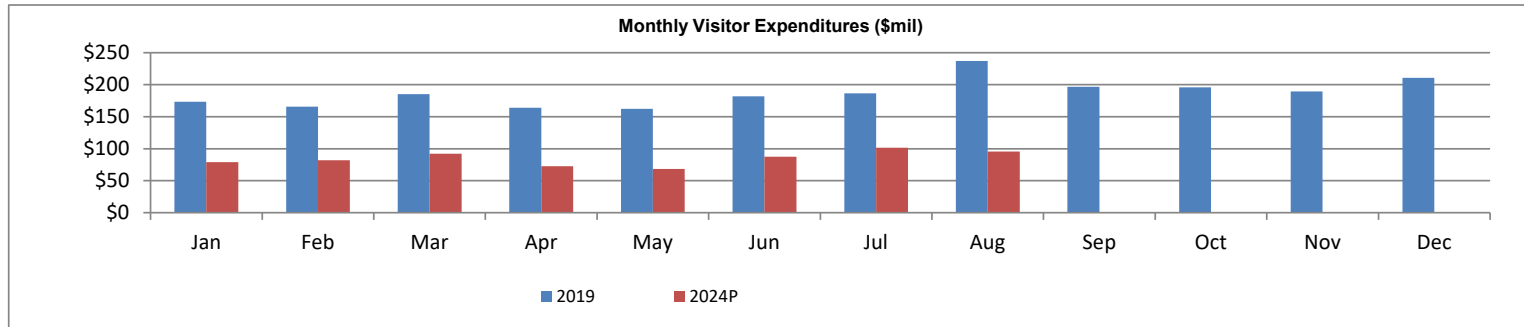
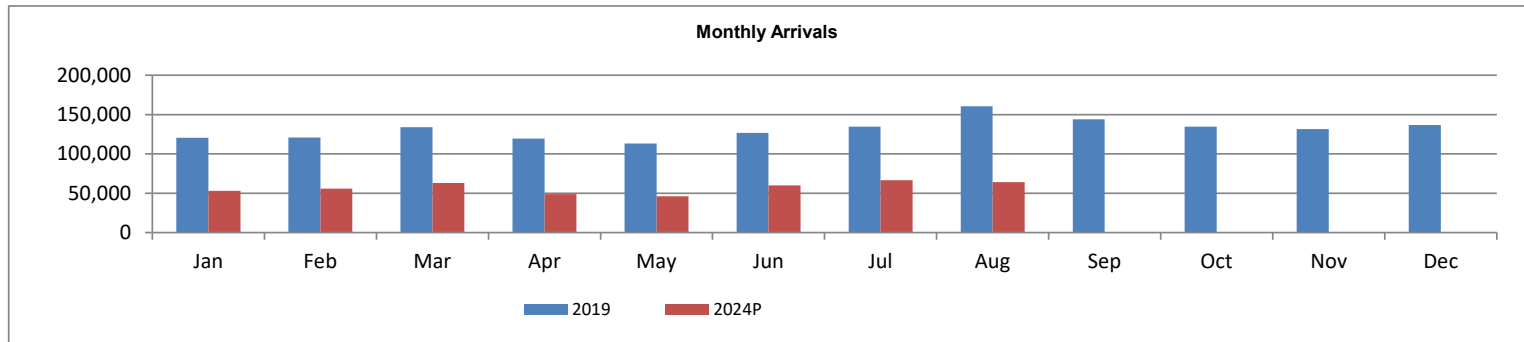
Key Performance Indicators

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -53.4%	1,455.9	678.3	1,070.5	O'ahu	-54.2%	446,767
Daily Spend (\$PPPD)	→ 0.0%	237.8	237.8	241.9	Maui	-72.3%	8,849
Visitor Days	↓ -53.4%	6,121,180	2,852,350	4,424,958	Moloka'i	-53.6%	504
Arrivals	↓ -55.6%	1,029,549	457,081	717,173	Lāna'i	-79.8%	311
Daily Census	↓ -53.6%	25,190	11,690	12,090	Kaua'i	-72.2%	4,385
Airlift (scheduled seats) <sup>^</sup>	↓ -29.7%	1,326,446	932,484	1,384,543	Hawai'i Island	-69.6%	32,383

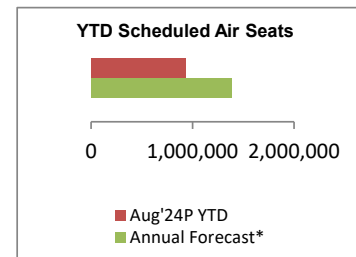
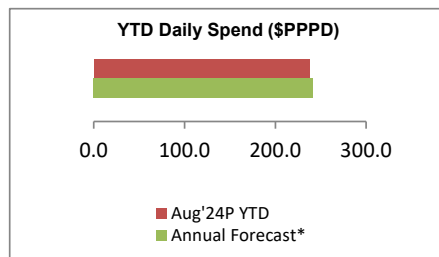
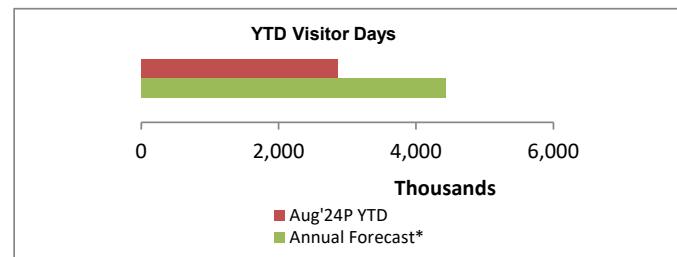
\* DBEDT Annual Forecast as of Q3 2024.

DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **CANADA**

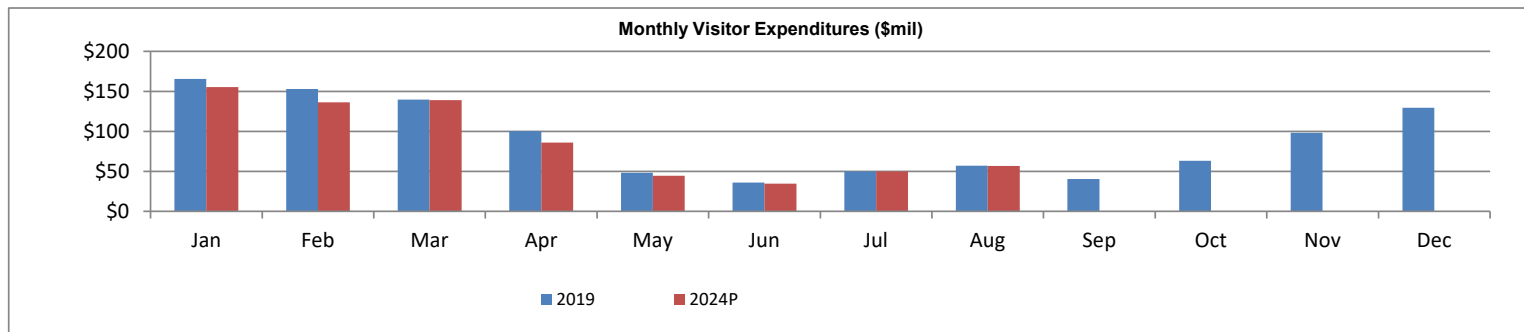
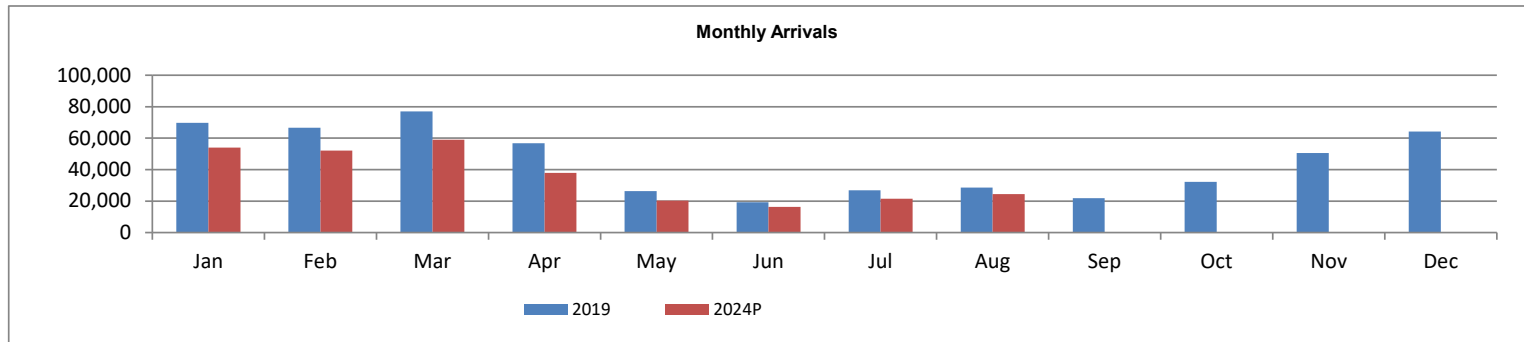
Key Performance Indicators

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	👉 -6.4%	750.1	702.2	1,093.6	O'ahu	1.0%	161,750
Daily Spend (\$PPPD)	👈 33.0%	166.3	221.2	223.7	Maui	-43.3%	105,765
Visitor Days	👇 -29.6%	4,510,009	3,174,511	4,887,902	Moloka'i	-52.8%	1,681
Arrivals	👇 -23.0%	371,146	285,842	432,558	Lāna'i	-65.5%	1,402
Daily Census	👇 -29.9%	18,560	13,010	13,355	Kaua'i	-42.6%	30,274
Airlift (scheduled seats) <sup>^</sup>	👇 -17.0%	341,447	283,546	420,651	Hawai'i Island	-24.4%	49,702

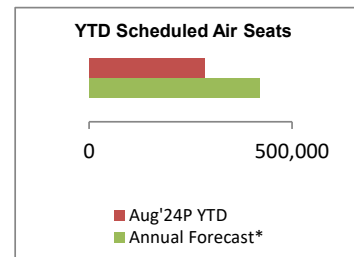
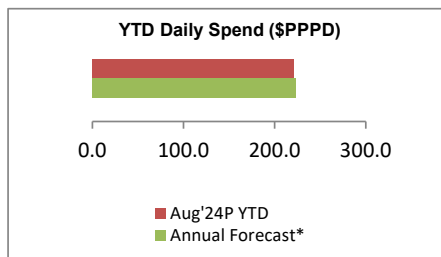
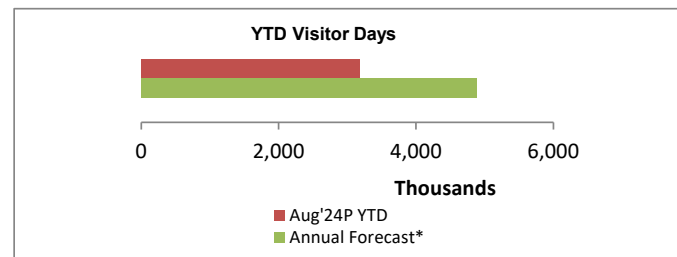
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Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **OCEANIA**

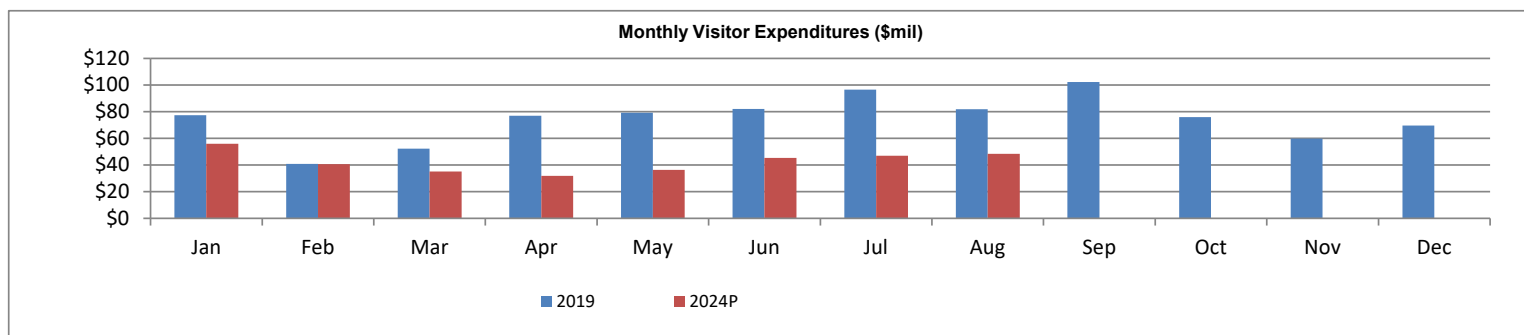
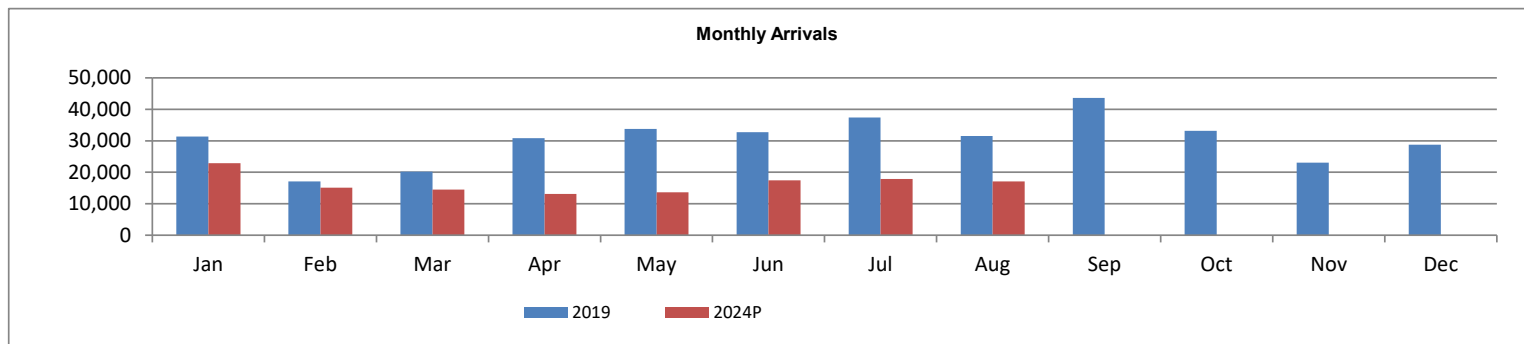
Key Performance Indicators

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -42.0%	587.3	340.8	545.8	O'ahu	-44.0%	128,971
Daily Spend (\$PPPD)	↑ 11.1%	264.5	293.9	297.1	Mauī	-66.8%	13,271
Visitor Days	↓ -47.8%	2,220,599	1,159,640	1,837,054	Moloka'i	-62.3%	1,220
Arrivals	↓ -43.9%	234,869	131,769	208,756	Lāna'i	-68.6%	1,348
Daily Census	↓ -48.0%	9,138	4,753	5,019	Kaua'i	-53.4%	9,812
Airlift (scheduled seats) <sup>^</sup>	↓ -41.0%	331,065	195,326	296,106	Hawai'i Island	-53.0%	13,693

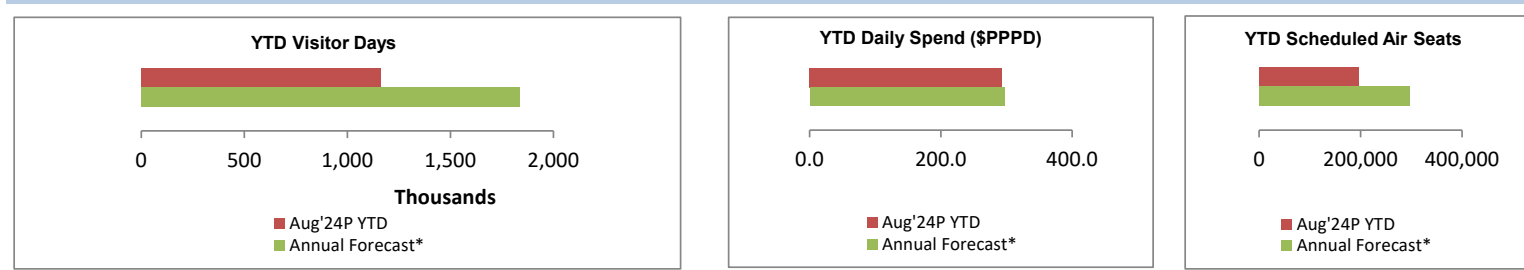
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Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **OTHER ASIA**

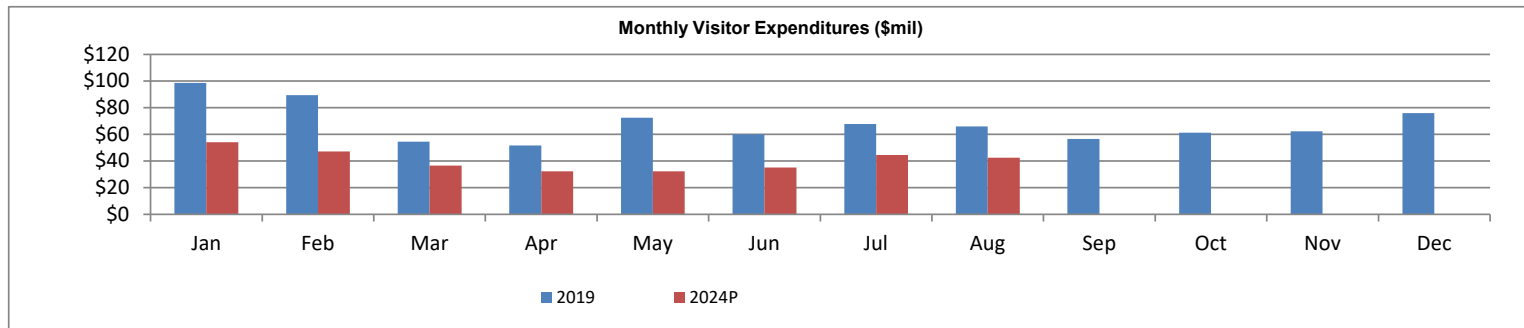
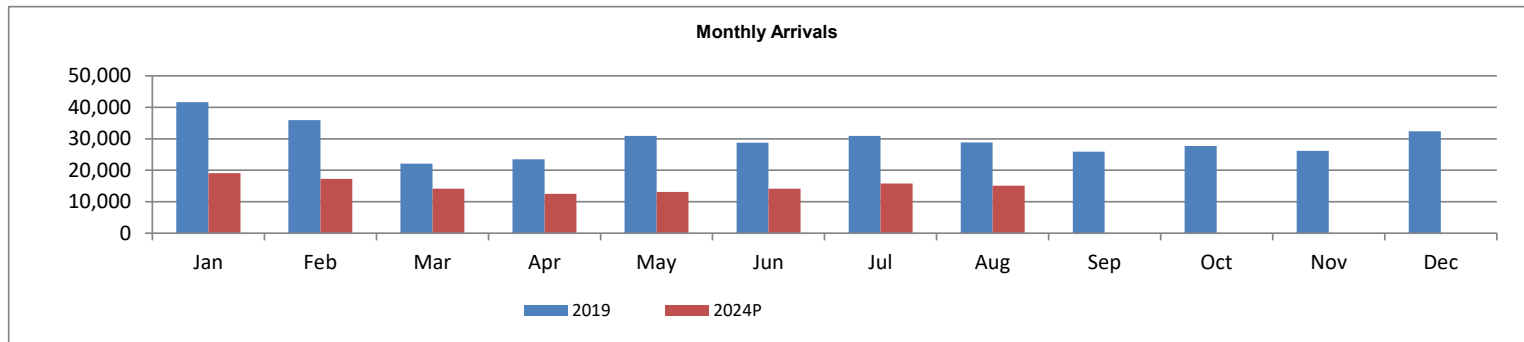
Key Performance Indicators

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -42.1%	560.6	324.5	NA	O'ahu	-50.6%	116,722
Daily Spend (\$PPPD)	↔ 9.8%	289.2	317.7	NA	Maui	-83.0%	6,632
Visitor Days	↓ -47.3%	1,938,104	1,021,411	NA	Moloka'i	-68.1%	308
Arrivals	↓ -50.0%	242,458	121,179	NA	Lāna'i	-75.0%	305
Daily Census	↓ -47.5%	7,976	4,186	NA	Kaua'i	-49.4%	4,448
Airlift (scheduled seats) <sup>^</sup>	↓ -41.9%	331,035	192,221	277,962	Hawai'i Island	-53.4%	23,459

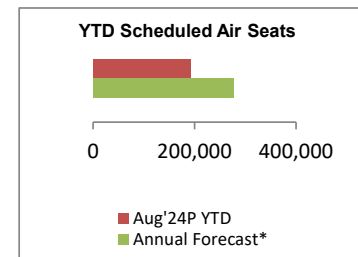
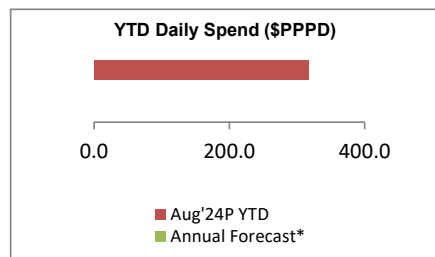
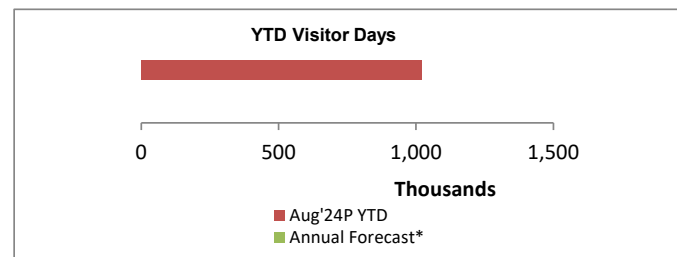
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of September 17, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **KOREA**

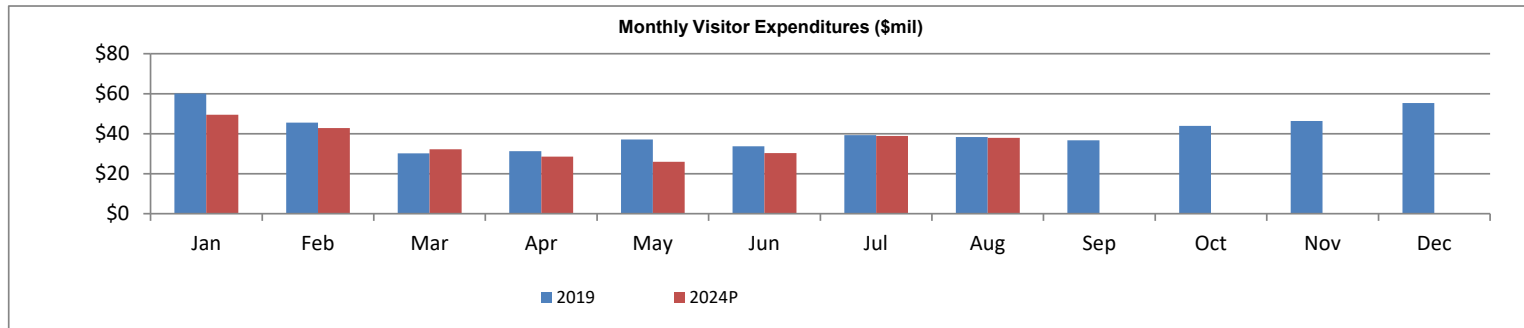
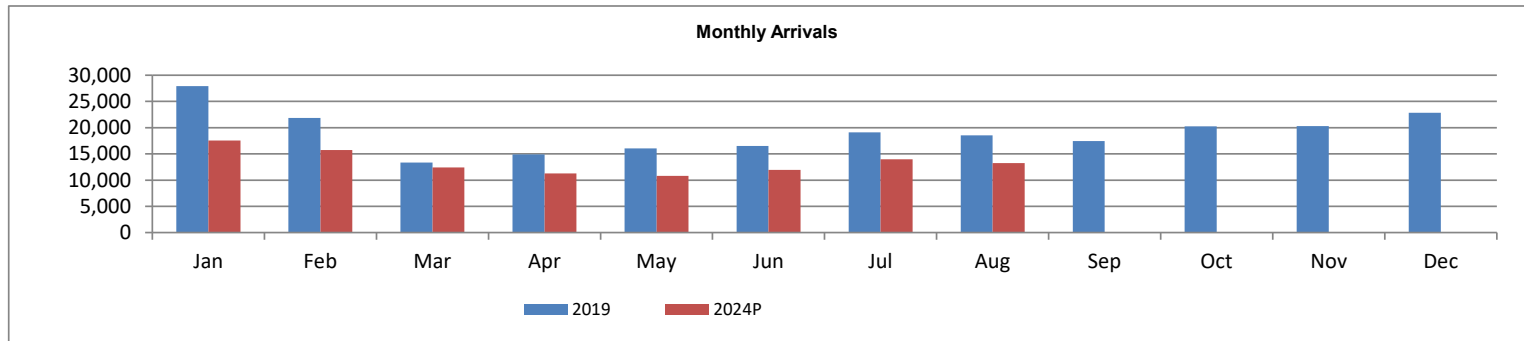
Key Performance Indicators

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	👉 -9.3%	315.5	286.2	440.7	O'ahu	-28.1%	104,848
Daily Spend (\$PPPD)	👈 15.3%	272.2	313.9	319.6	Mau	-76.0%	4,563
Visitor Days	👇 -21.3%	1,159,169	911,983	1,378,778	Moloka'i	-40.3%	256
Arrivals	👇 -27.9%	148,233	106,948	162,209	Lāna'i	-55.8%	171
Daily Census	👇 -21.6%	4,770	3,738	3,767	Kaua'i	-27.4%	3,444
Airlift (scheduled seats) <sup>^</sup>	👇 -11.9%	218,242	192,221	277,962	Hawai'i Island	10.2%	19,845

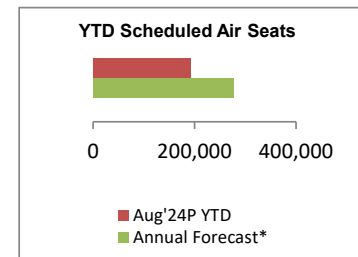
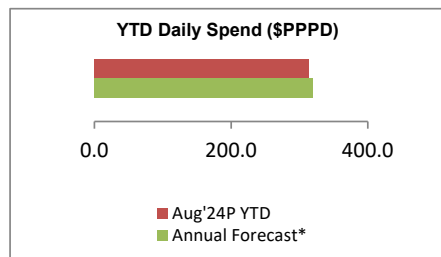
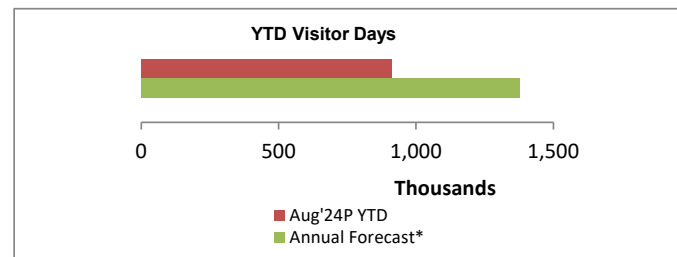
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Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **CHINA**

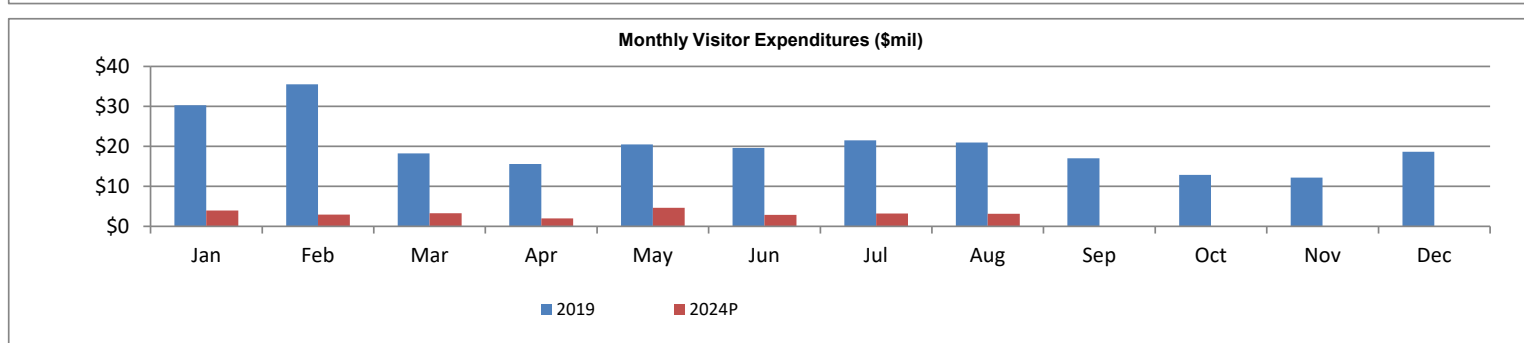
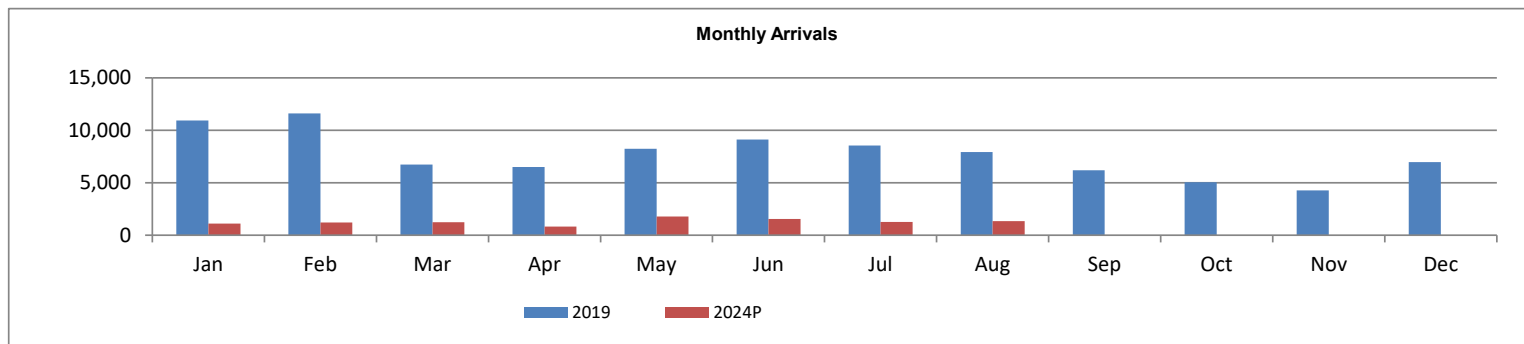
Key Performance Indicators

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -85.7%	182.1	26.0	NA	O'ahu	-86.6%	8,985
Daily Spend (\$PPPD)	↔ 8.5%	324.7	352.2	NA	Mauī	-91.5%	1,306
Visitor Days	↓ -86.9%	560,682	73,726	NA	Moloka'i	-92.9%	35
Arrivals	↓ -85.2%	69,626	10,275	NA	Lāna'i	-83.9%	108
Daily Census	↓ -86.9%	2,307	302	NA	Kaua'i	-79.1%	602
Airlift (scheduled seats) <sup>^</sup>	N/A	86,171	N/A	N/A	Hawai'i Island	-89.5%	2,809

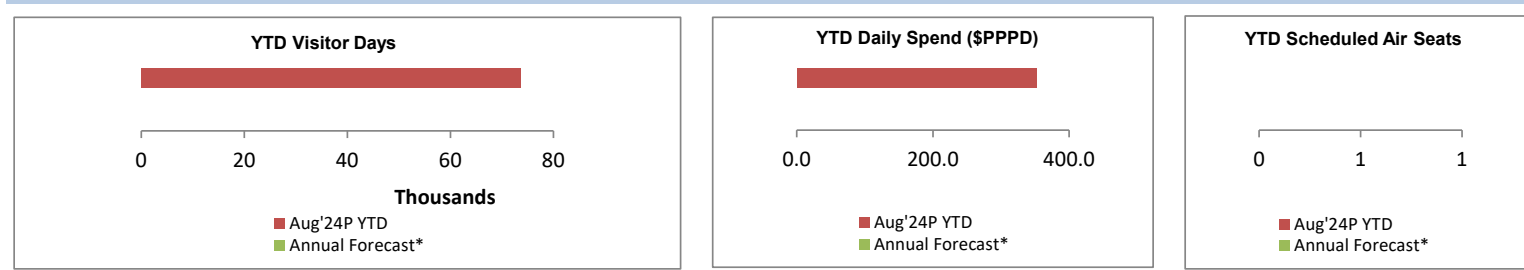
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Monthly Indicators



Annual Indicators



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HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **EUROPE**

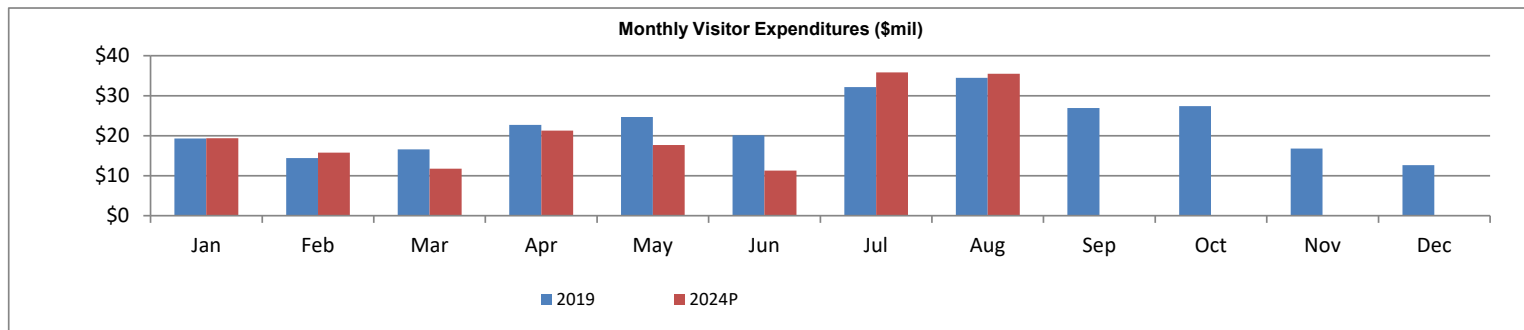
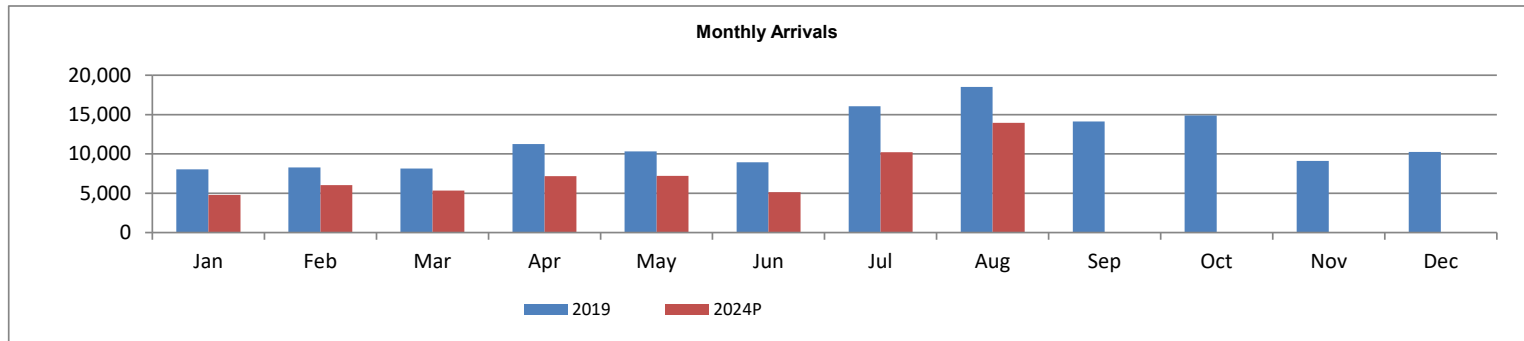
Key Performance Indicators

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	👉 -8.7%	184.4	168.4	261.9	O'ahu	-30.2%	46,585
Daily Spend (\$PPPD)	👈 34.2%	159.6	214.2	227.5	Maui	-51.2%	19,648
Visitor Days	👇 -31.9%	1,155,110	786,230	1,150,933	Moloka'i	-65.1%	397
Arrivals	👇 -33.2%	89,559	59,810	85,571	Lāna'i	-76.6%	267
Daily Census	👇 -32.2%	4,754	3,222	3,145	Kaua'i	-34.9%	14,710
Airlift (scheduled seats) <sup>^</sup>	N/A	N/A	N/A	N/A	Hawai'i Island	-30.9%	18,747

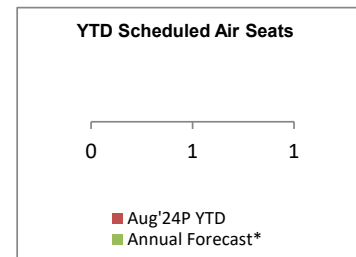
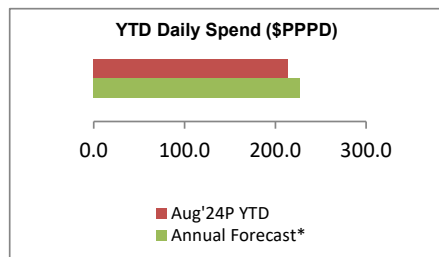
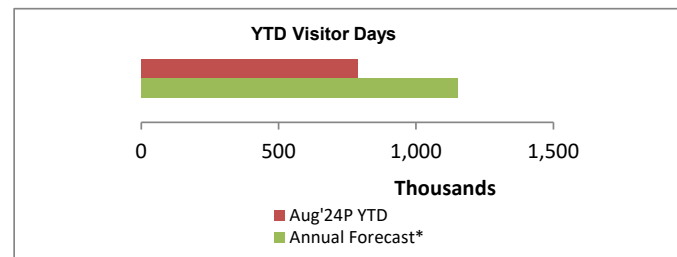
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Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Aug-24** Preliminary

Visitor Industry Performance Measures

Market: **LATIN AMERICA**

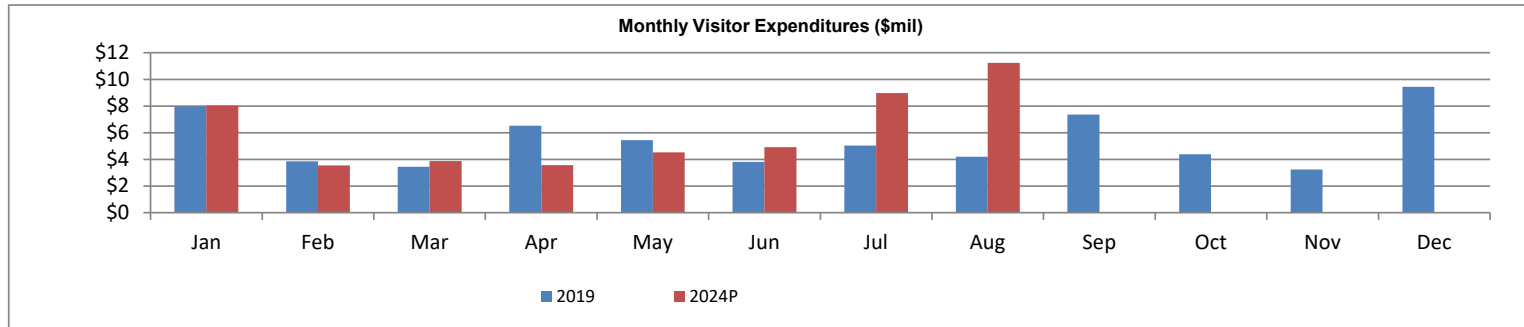
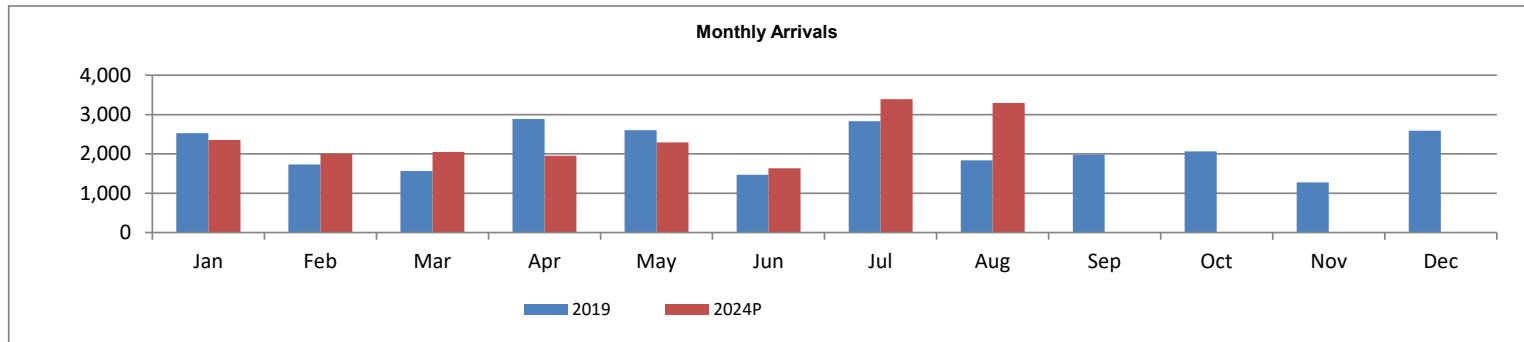
Key Performance Indicators

	YOY Rate	Aug'19 YTD	Aug'24P YTD	Annual Forecast*		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↑ 20.8%	40.3	48.7	NA		O'ahu	6.2%	14,165
Daily Spend (\$PPPD)	↑ 12.8%	216.8	244.5	NA		Maui	-9.0%	5,441
Visitor Days	↔ 7.1%	185,792	199,019	NA		Moloka'i	-45.5%	74
Arrivals	↔ 8.7%	17,441	18,962	NA		Lāna'i	-70.1%	107
Daily Census	↔ 6.7%	765	816	NA		Kaua'i	-0.8%	2,286
Airlift (scheduled seats) <sup>^</sup>	N/A	N/A	N/A	N/A		Hawai'i Island	16.0%	4,052

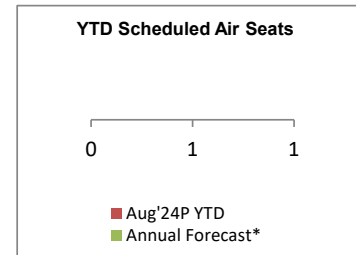
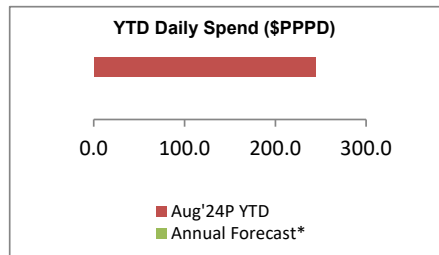
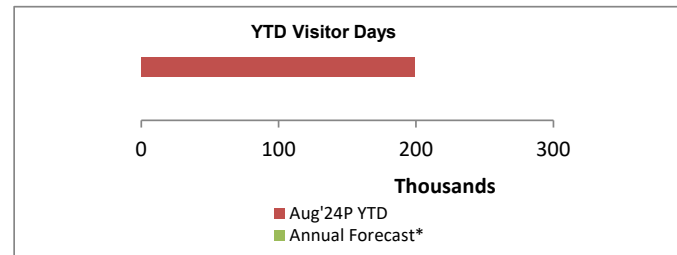
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Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures



**Presentation, Discussion, and/or Action on  
CY2025 Brand Marketing Plans**

- a. Meet Hawaii**
- b. Hawai'i Tourism USA**
- c. Hawai'i Tourism Japan**
- d. Hawai'i Tourism Canada**
- e. Hawai'i Tourism Oceania**
- f. Hawai'i Tourism Europe**
- g. Hawai'i Tourism Korea**
- h. Hawai'i Tourism China**

10a

**Meet Hawaii**



Hawai'i Visitors & Convention Bureau – Meet Hawai'i

# HTA Board Meeting

Thursday, 10/3/2024

# Meet Hawai'i

Meet Hawai'i is a collaboration of the Hawai'i Visitors and Convention Bureau (HVCB) and Hawai'i Convention Center (HCC) to reinforce the brand of the Hawaiian Islands as a world-class destination for business meetings, conventions, and incentive programs.

Meet Hawai'i is overseen by the Hawai'i Tourism Authority (HTA). Our mission aligns with HTA's four pillars:

- Natural Resources
- Hawaiian Culture
- Community
- Brand Marketing



**City-wide Events and  
Single Property  
Meetings**



**Center Operations,  
Local Sales &  
Community Events**

# MEET HAWAI'I TEAMS



## SINGLE PROPERTY SALES TEAM



**Laurie Wong Ihara**  
SENIOR DIRECTOR OF  
SALES



**Kathy Dever**  
REGIONAL DOS  
US MIDWEST, CANADA



**Meredith Parkins**  
REGIONAL DOS  
US EAST, EUROPE



**Marykay Lui**  
REGIONAL DOS  
US WEST & CENTRAL



**Debbie Zimmerman**  
'ELELE DIRECTOR

## CITYWIDE SALES TEAM



**Adrienne Nudo**  
SENIOR DIRECTOR  
US MIDWEST



**Tom Casademont**  
SENIOR DIRECTOR  
SE, CENTRAL, EUROPE



**Trevor Newman**  
DIRECTOR  
US WEST



**Susanna Flores**  
NATIONAL DIRECTOR  
CORPORATE, NE

## SUPPORT SERVICES



**Josette Murai**  
SENIOR MANAGER  
SALES ADMINISTRATION



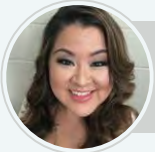
**Stancen Abbey**  
SENIOR SALES OPERATIONS  
ANALYST



**Jona Caamal**  
SALES COORD  
CITYWIDE SALES



**Karla Sison**  
SALES COORD  
SINGLE PROPERTY



**Christina Jeremiah**  
SALES COORD  
DATA

## CLIENT SERVICES



**Lee Conching**  
DIRECTOR CLIENT  
SERVICES



**Bri Leite-Ah Yo**  
COORDINATOR CLIENT  
SERVICES



**Lynn Whitehead**  
VP MCI GLOBAL SALES &  
MARKETING



**Laurie Wong Ihara**  
SENIOR DIRECTOR OF SALES  
SINGLE PROPERTY

## MEET HAWAI'I TEAMS - ASIA, OCEANIA



**Hiroyuki Hachiya**  
COUNTRY DIRECTOR  
JAPAN



**Kris Phadungkiatipong**  
COUNTRY DIRECTORS  
OCEANIA



**Emily Kim**  
COUNTRY DIRECTOR  
KOREA



**Martin Lee**  
ACCOUNT DIRECTOR  
KOREA



**Josephine Lee**  
MANAGER  
ASIA/OCEANIA



**Andrew Koh**  
EXECUTIVE DIRECTOR  
ASIA/OCEANIA

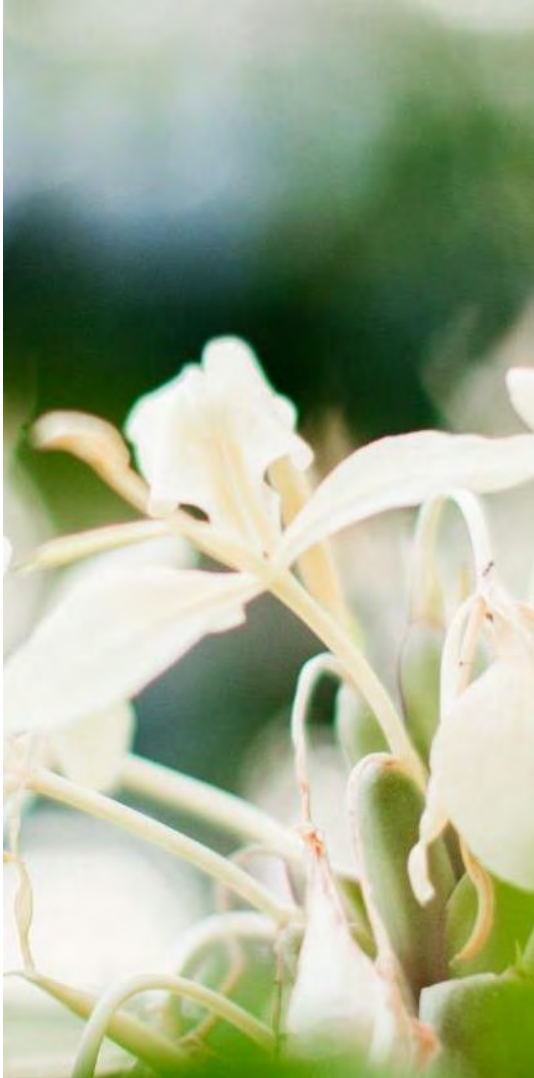
# Market Situation And Industry Insights



## General Overview

- The global MCI industry is anticipated to grow from approximately \$870 billion in 2024 to around \$1.47 trillion by 2030 with a CAGR of 9.1% during the forecast period.
- Incentive meetings are the fastest growing segment in the market segmented by event type at a CAGR of 9.8% during 2023-2028.
- According to recent DBEDT MCI Reports (Aug 2024) visitor spending increased 233M from 2023 to 2024, a 28.8% increase YOY.
- Slowdown in leisure is placing heavier emphasis on attracting MCI business; competition is offering increased incentives in order to close the deal.
- 2025 – 2026: Group demand relative to 2019 shows slow growth over the next two years. *2Synergize FuturePace; Tourism Economics*

## Market Situation And Industry Insights



### Single Property

- Booking cycle continues to be under 2 years.
- Incentive and Corporate meetings continue to be focus for all islands.
- Hotel chains will see strongest demand for new business.
- Association and corporate meetings are sourcing smaller room blocks to avoid attrition penalties.
- Maui updates are included in all conversations.



## Market Situation And Industry Insights



### Citywide

- Refreshed building and repaired roof to be complete by 2027.
- Short term booking cycle continues to be strong. We are on pace for 2027; 2026 building will be closed.
- Full time seller dedicated to Corporate market segment.
- Regenerative Tourism, HCC Carbon offset program and Hawai'i's commitment to equity and inclusivity are important to attracting MCI business.

## Market Situation And Industry Insights



### Asia/Oceania

- Appreciation of the Yen! 15% increase from mid-Jul to mid-Sep.
- JTB and HIS consider Hawai'i as the most important group destination for 2025.
- Korea market remains challenging due to weak group landscape and the reduction in air seats.
- Qantas Launching Melbourne – Honolulu Flight starting May 2025, 3 times weekly.
- Visa still a main issue for Chinese Groups.
- Competition is investing heavily in source markets to attract MCI Group business. Cash incentives more common.

# Target Audience

## REGIONS

United States

Japan

Canada

Oceania

Korea



# Meet Hawai'i Brand Highlights

- Global Accessibility
- Increased Attendance
- 'Elele Program – Connection to community
- Commitment to sustainability and regenerative tourism
- Diversity
- Culture
- Maui is part of every conversation



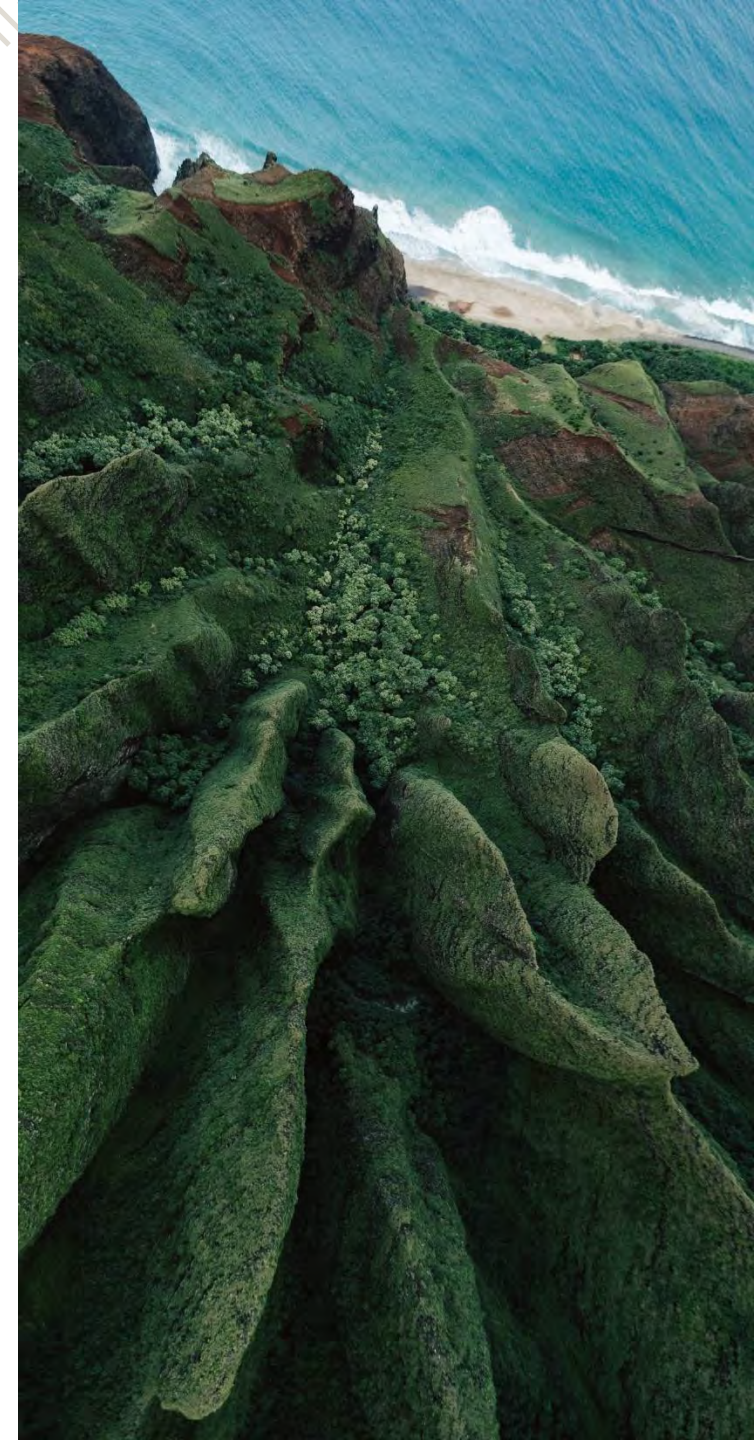
## Citywide Strategies

- **2027 Refresh** - talking story to re-engage potential and repeat customers with our refreshed building in 2027
- **Collaboration**
  - Need Months/Years
  - Target preferred market mix for each year
  - Continue to evaluate every opportunity to ensure the EI is maximizing revenue for the state while providing the right group for Hawai'i
- Clearly define our sports strategy
- **Elevate** our presence in the **Corporate** market segment



## Single Property Strategies

- **Island Ambassadors** - Need dates, updates, strategy for each island
- Customize incentives to drive business into need periods
- Remain agile and change strategy when market dictates
- Strategic Partnerships with key intermediaries
- Leveraging data to ensure our strategies are grounded in reliable insights



## Major Programs



### Citywide/Single Property

- IMEX America
- Professional Convention Management Association
- American Society of Association Executives (Los Angeles)
- Citywide and Single property Annual FAMs
- On-going direct sales calls and destination presentations in market
- Sales Missions in key markets targeting both citywide and single property customers – Bay Area, Chicago, Washington, DC and Northeast

## Major Programs



### Asia/Oceania

- Meet Hawai'i Japan Corporate Seminar and Aloha Reception
- Meet Hawai'i Japan Aloha Ambassador Program
- Strategic MOU with two major wholesalers in Japan
- Korea Sales Mission
- Oceania Sales Mission
- Associations Forum Australia
- Business Expo New Zealand



# Meet Hawai'i Website Redesign

- New and refreshed content
- Intuitive navigation
- CSR Opportunities
- Interactive maps for each island



The Picture-perfect Destination for Your Meeting, Convention, or Incentive

## WELCOME TO THE HAWAIIAN ISLANDS



The Six Hawaiian Islands

### QUICK FACTS:

A premier meeting space destination with amazing tropical landscapes and incomparable hospitality, Hawai'i is the perfect spot. Allow Meet Hawai'i to guide you and have access to the best resources available. [Learn More](#)

Nonstop Service From Hawai'i

**40+**  
global gateway cities

Number of Resort Areas

**18**

Unique, Offsite & Outdoor Venues Around The Islands

**50+**

**Island of Hawai'i**

Hawai'i Time  
Depending on Daylight Savings Time

Average Year Round Temperatures

**77°F**  
25° Celsius

Number of Hotels Around The Islands

**147**  
51,711 Overnight Rooms

Top Attractions Around The Islands

**22+**  
\*Whale watching (Dec-May)

### HAWAIIAN ISLANDS

EXPLORE: Kauai | Oahu | Molokai | Lanai | Maui | **Island of Hawai'i**

### Island of Hawai'i

OFFSITE VENUES

THINGS TO DO

#### Welcome to Hawai'i Island

Take a road trip into the great wide open on the youngest and largest of the Hawaiian Islands. Nearly twice as big as all of the other Hawaiian Islands combined, the island of Hawai'i's vast, isolated expanses are awe-inspiring. Your attendees can see some of the most pivotal sites in Hawaiian history and visit a volcano, while traveling through all but four of the world's different climate sub-zones. From the crystal blue waters of the Kona and Kohala Coasts to the black sands of Punaluu to the lush botanical gardens and waterfalls of the Hamakua Heritage Corridor, there is a world of diversity to experience on this rich, storied island that invites exploration, adventure and restoration.

Total Rooms: 4,500

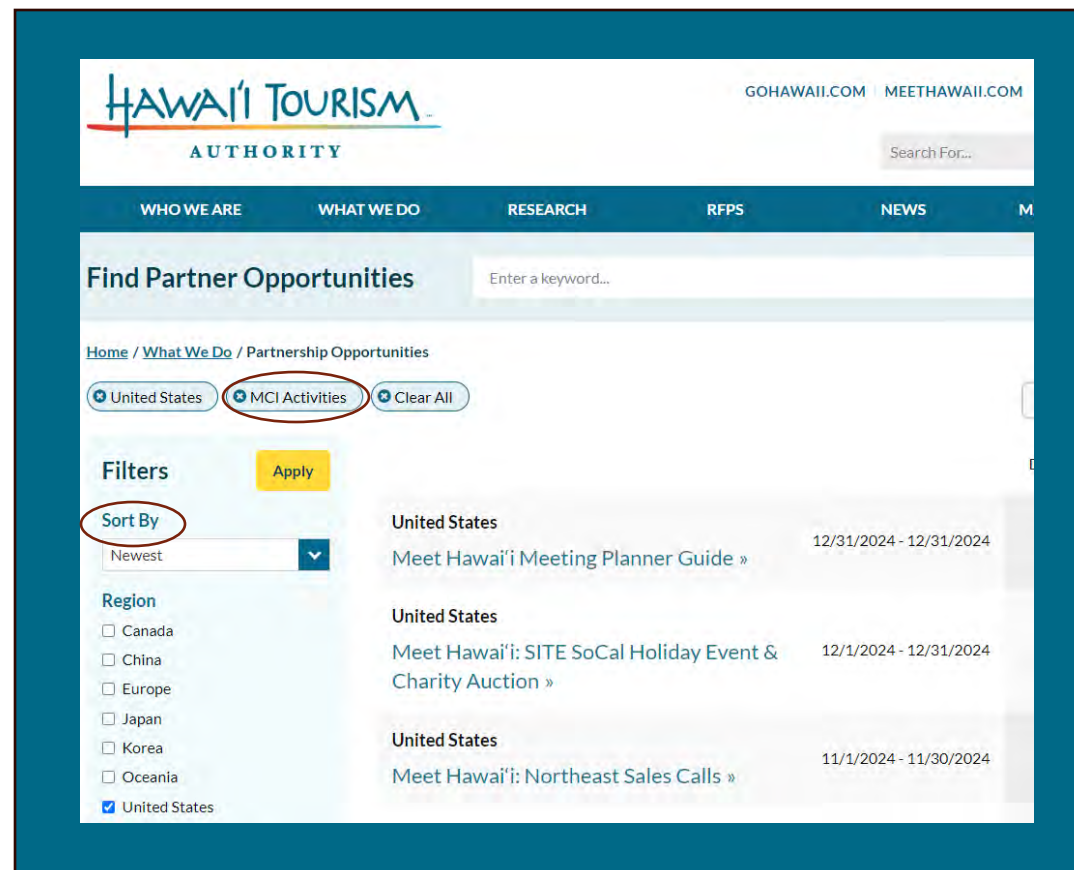
DISTANCE TO / FROM	
Oahu	60 min
Kauai	60 min
Maui	40 min
Lanai*	1.75hrs
Molokai**	3.25hrs

FLIGHTS TO / FROM:	
Los Angeles (LAX)	6.5hrs
San Francisco (SFO)	5hrs
Seattle (SEA)	6hrs
Chicago* (MDW)	11hrs

# Partnership Opportunities & Meet Hawai'i Communication

- Meet Hawai'i Partnerships on HTA Website
- Citywide Pace Reports (monthly)
- TravelClick Future Occupancy and PACE (weekly)
- TravelClick Group Report (monthly)
- MCI Newsletter
- Regular MCI Updates customized for each island





## Messaging

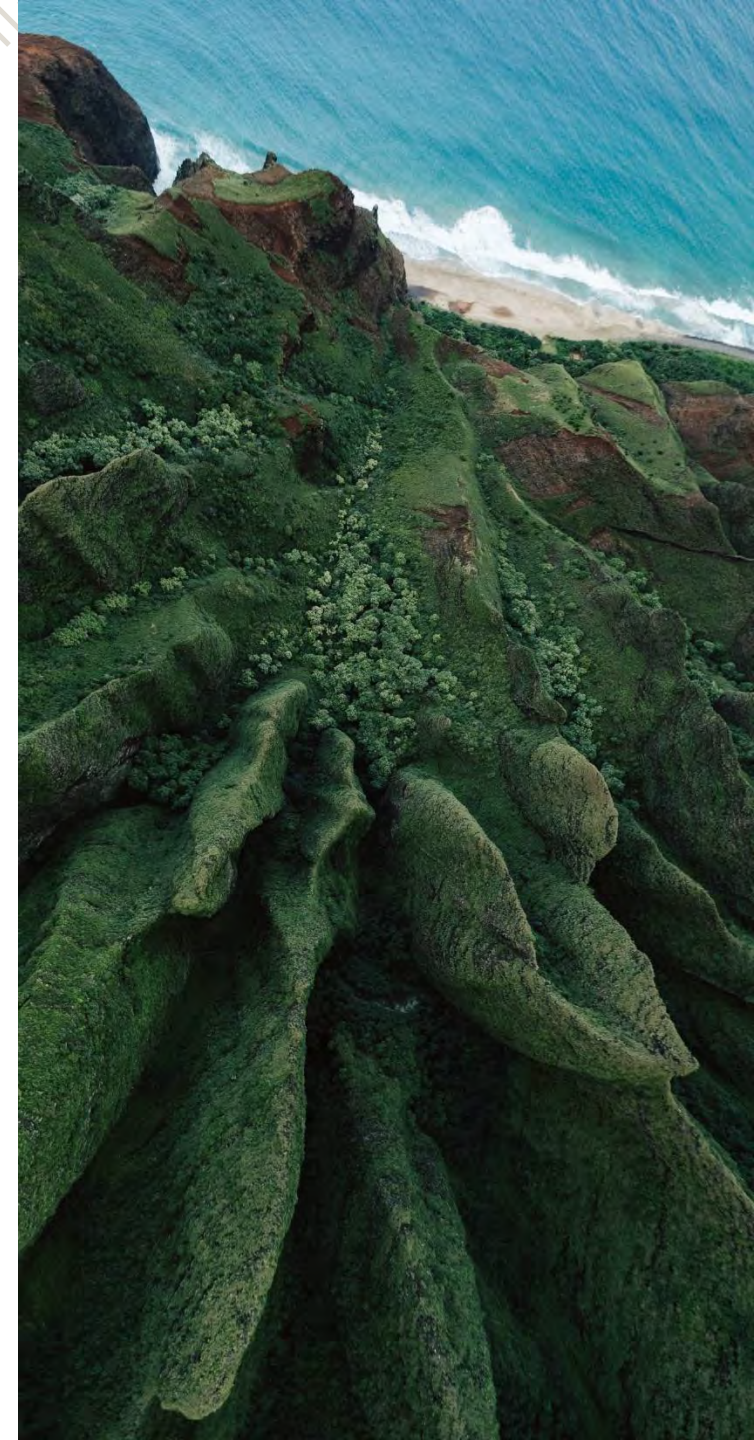
- Linked-in – premier platform for business networking and outreach to meeting planners



The screenshot shows the LinkedIn profile for Meet Hawaii. The profile picture is a banner image featuring a red flower and the Meet Hawaii logo. The bio states: "We are your 'google' information source for all things Hawaii! Hospitality · Honolulu, Hawaii · 1K followers". Navigation buttons include "Message", "Following", and a menu icon. The "Posts" tab is active, showing a post from "Meet Hawaii" (1,219 followers) dated "1d". The post text reads: "Los Angeles planners and friends! Join us and Māna Up Hawai'i this weekend for Aloha Market LA, a three-day immersive Hawai'i shopping experience taking place from September 20-22, 2024. Experience all that the Hawaiian Islands have ...more". Below the text is a promotional image for "Aloha Market" with the text "Coming to Los Angeles" and "aloha market". To the right of the main image is a smaller graphic titled "Event Features" with the subtext "Get excited for Aloha Market LA!" and several small images of event activities.

## Future Goals

- Re-introduce Strategic Partnerships Globally
- Add team member to strengthen client services
- Refreshed presence and booth at IMEX

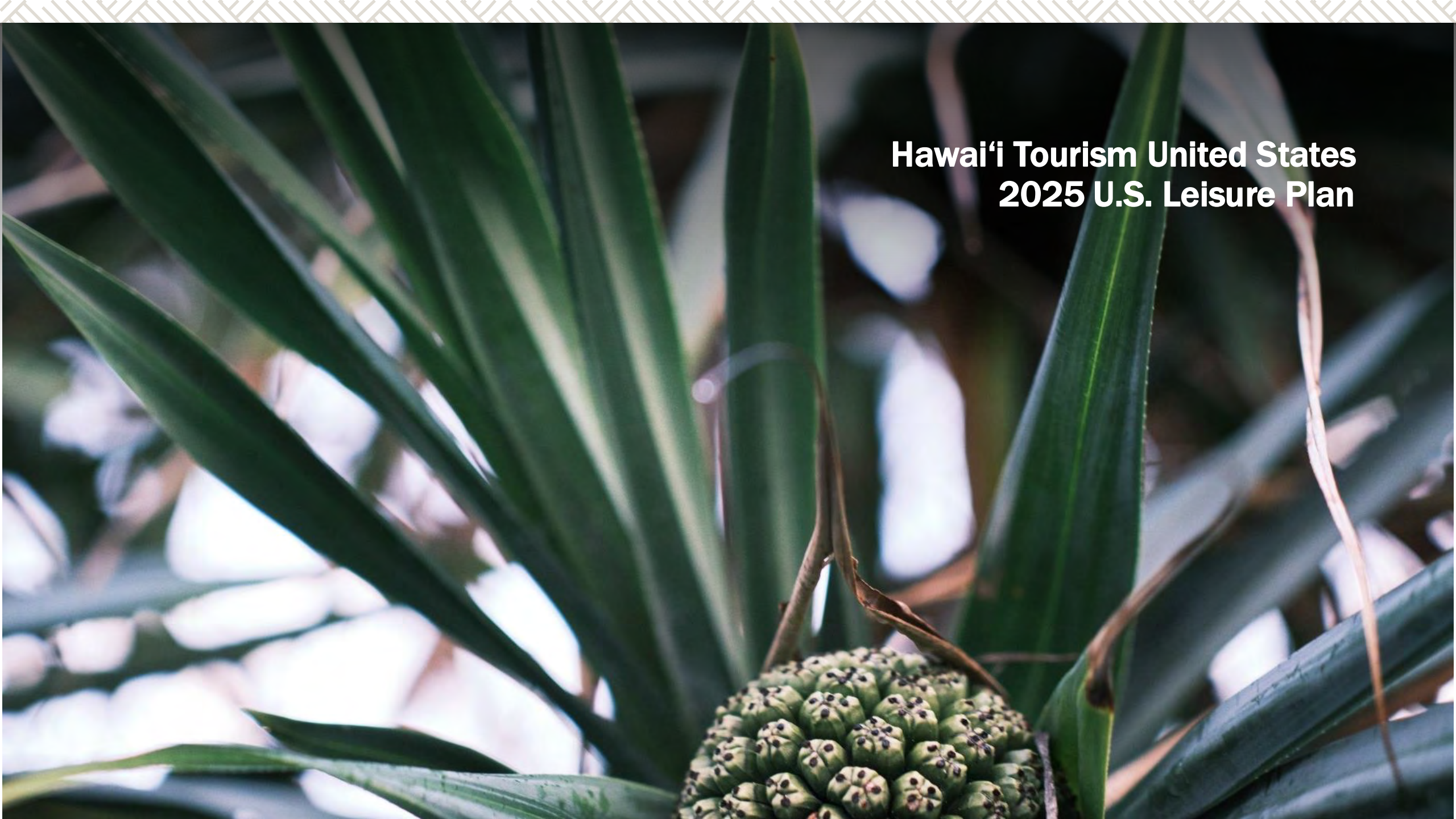


A close-up photograph of a green leaf, showing a network of veins. The central vein is the most prominent, with smaller veins branching off at regular intervals. The leaf's surface has a slightly textured appearance. The word "Mahala" is written in a white, cursive font across the lower-left portion of the leaf.

*Mahala*

10b

**Hawai'i Tourism USA**



**Hawai'i Tourism United States  
2025 U.S. Leisure Plan**

# Agenda



- Current Market Situation
- Target Audience
- Messaging
  - The People The Place The Hawaiian Islands
- Social Media
- Branded Content
- Public Relations
- Travel Trade
- Partnership Opportunities





**Market Insights**



# Market Insights

- GDP will continue to grow throughout the remainder of 2024 and then slow into 2025
- The U.S. MMA remains the primary source market for the Hawai'i visitor industry
- Transpacific airlift from the U.S. remains stable, Honolulu is the dominant destination for seats
- Maui continues to see softness for visitation and non-stop airlift
- Hotel booking pace trend for room nights is mixed. Maui, particularly West Maui continues to face declines in future bookings.

# U.S. Arrivals & Spending Increase 2024 Year-to-Date through August

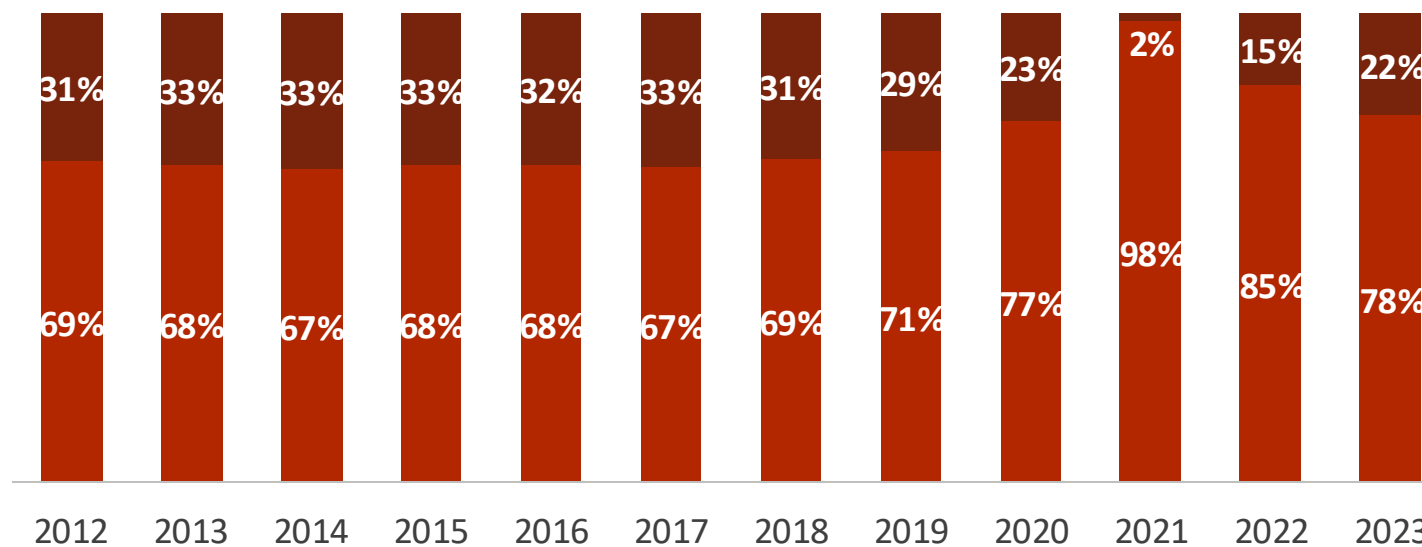
	Visitor Arrivals	Expenditures	\$PPPD
Total U.S.	5.00 million (-4.7%)	\$10.86 billion (-2.9%)	\$245.9 (+3.0%)
U.S. West	3.36 million (-4.1%)	\$6.59 billion (-1.6%)	\$233.8 (+3.8%)
U.S. East	1.64 million (-5.9%)	\$4.26 billion (-4.8%)	\$267.4 (+1.9%)

Source: HTUSA analysis of HTA data, YTD through August 2024P

# U.S. Share of Hawai'i Visitors Remains Strong

## Share of Visitor Arrivals by Year

■ US MMA ■ Other MMAs

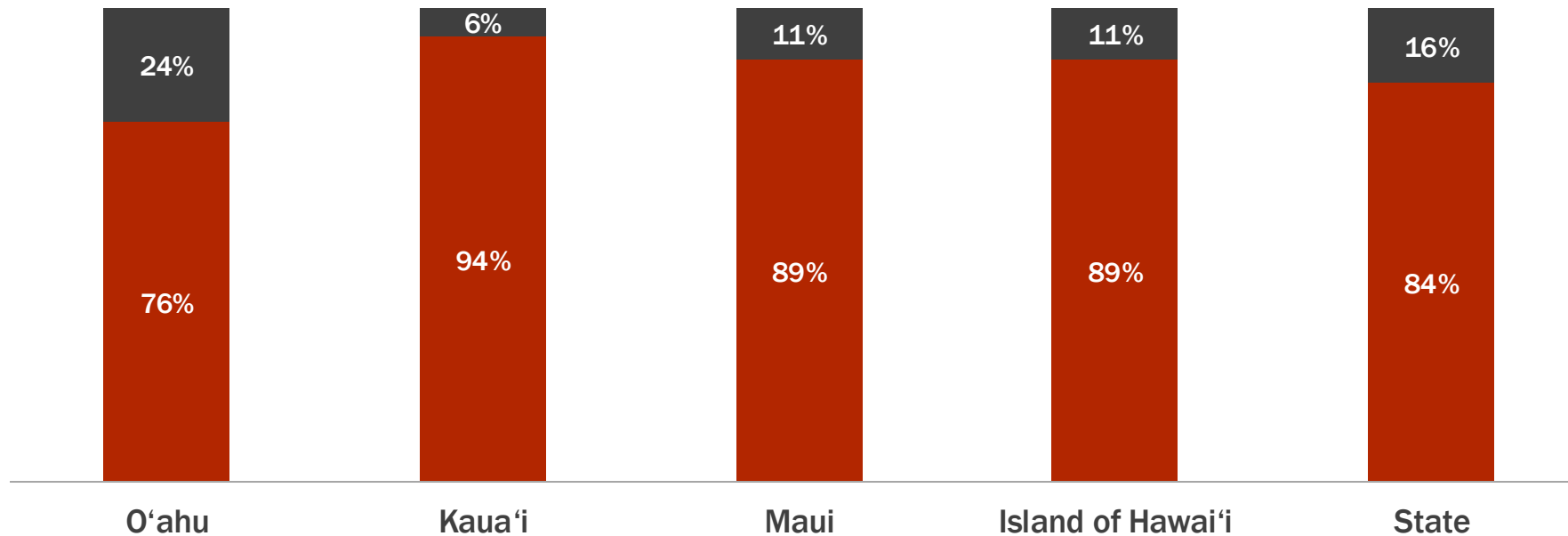


Source: HTUSA analysis of HTA 2023 data

# U.S. Market is Foundation of Hawai'i's Visitor Industry

Share of visitor arrivals by island in 2023

■ US MMA ■ Other MMAs



Source: HTUSA analysis of DBEDT 2023 data



**Looking Ahead to 2025**

# U.S. Economic Growth to Slow into 2025

U.S. GDP Growth Forecast



Source: HTUSA analysis of S&P Global Ratings data

# U.S. MMA Trans-Pacific Air Seat Synopsis

## October – December 2024 Projections

	# of SEATS 2022 Oct - Dec	# of SEATS 2023 Oct- Dec	# of SEATS 2024P Oct - Dec	% Change 24/22	% Change 24/23
O'ahu	1,376,751	1,474,203	1,490,951	8.3%	1.1%
Maui	727,461	540,648	569,966	-21.6%	5.4%
Kona	290,696	329,897	317,849	9.3%	-3.7%
Kaua'i	267,067	227,654	241,867	-9.4%	6.2%
Total	2,661,975	2,572,402	2,620,633	-1.6%	1.9%



# U.S. MMA Trans-Pacific Air Seat Synopsis

## January – April 2025 Projections as of September 2024

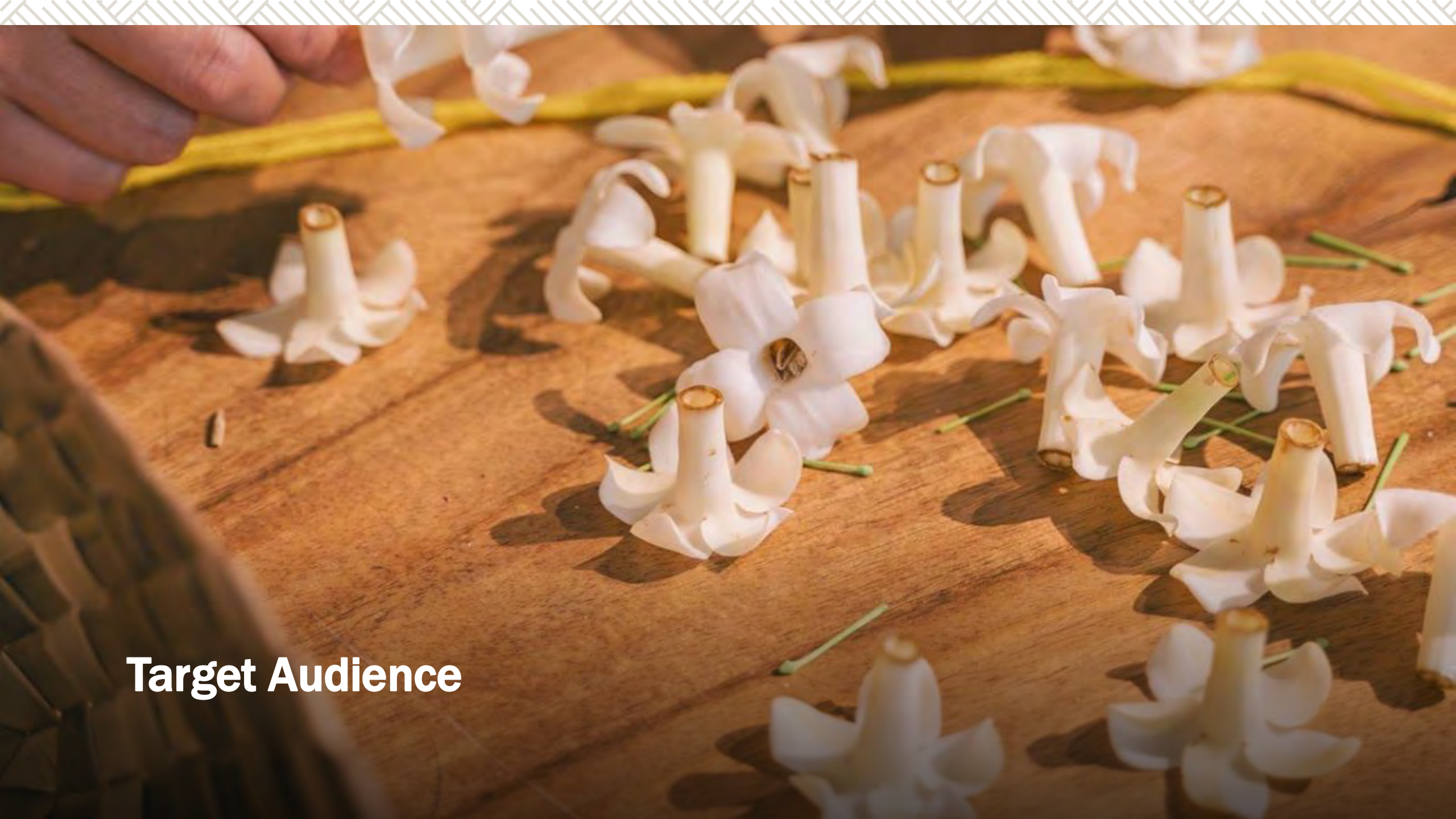
	# of SEATS 2023 Jan-April	# of SEATS 2024P Jan-April	# of SEATS 2025P Jan-April	% Change 25/23	% Change 25/24
O'ahu	1,916,361	1,964,880	1,978,095	3.2%	0.7%
Maui	1,017,760	783,533	765,413	-24.8%	-2.3%
Kona	430,274	410,945	413,525	-3.9%	0.6%
Kaua'i	339,117	303,396	307,072	-9.4%	1.2%
Total	3,703,512	3,462,754	3,464,105	-6.5%	0.0%

# Hawai'i (All Islands) Total Room Nights On The Books September 2024 – May 2025 CY vs 2YAGO as of September 15, 2024

Month	State of Hawai'i	O'ahu	Maui	West Maui	Kaua'i	Island of Hawai'i
September 2024	-2.7%	-1.8%	-19.1%	-29.9%	+34.2%	-6.3%
October 2024	-5.7%	-2.4%	-33.1%	-41.0%	+24.0%	-15.1%
November 2024	-9.4%	-8.2%	-48.1%	-56.1%	+1.0%	-4.5%
December 2024	+1.0%	+1.9%	-49.6%	-58.8%	+17.6%	+1.9%
January 2025	+6.0%	+4.7%	-11.5%	-	+30.2%	+30.8%
February 2025	+7.2%	+8.8%	-8.8%	-	+26.5%	+30.7%
March 2025	+10.3%	+14.2%	+1.0%	-	+23.9%	+6.7%
April 2025	+9.5%	+21.7%	-12.5%	-	+8.2%	+10.8%
May 2025	+14.7%	+20.7%	-13.0%	-	+38.5%	+43.4%

## West Maui Total Room Nights Booked & Consumed & On The Books January 2024 - December 2024 CY over 2022 as of September 15, 2024

Month	September 15, 2024	September 8, 2024	September 1, 2024
January 2024	+50.7%	+50.7%	+50.7%
February 2024	+44.9%	+44.9%	+44.9%
March 2024	+16.9%	+16.9%	+16.9%
April 2024	+4.3%	+4.3%	+4.3%
May 2024	+3.7%	+3.7%	+3.7%
June 2024	-19.1%	-19.1%	-19.1%
July 2024	-21.9%	-21.9%	-21.9%
August 2024	-29.7%	-29.7%	-29.8%
September 2024	-29.9%	-31.3%	-33.9%
October 2024	-41.0%	-46.6%	-50.4%
November 2024	-56.1%	-58.8%	-61.8%
December 2024	-58.8%	-61.8%	-64.4%



**Target Audience**

# Travel Marketing Continuum



# Audiences



HAWAII  
RESIDENT

## **Kaiaulu – Community Based**

Strongly connected to their local communities, prioritizing family, tradition, and mutual support.

## **Kumupa‘a – Culturally Rooted**

Deep respect for both Hawaiian and local traditions and practices, with a commitment to preserving cultural heritage.

## **Aloha ‘Āina - Environmental Stewards**

Passionate about protecting Hawaii's natural resources, advocating for sustainability and responsible tourism.

## **Kia‘i Aloha - Guardians of Aloha**

Strive to maintain the spirit of aloha.



HAWAII  
TARGET TRAVELER

## **Respectful Explorer**

Curious about Hawaii's unique beauty and traditions, and mindful of their impact on communities and the environment.

## **Culinary Enthusiast**

Travel to enjoy new cuisines, discover traditional dishes, and support local restaurants, farmers, ranchers, and fishers.

## **Cultural Curiosity**

Interested in Hawaiian culture; appreciate being enriched while learning about local traditions.

## **Soft Adventure**

Seek moderate outdoor activities like hiking and snorkeling as they explore during the day and come back to luxury at night.



**Messaging**

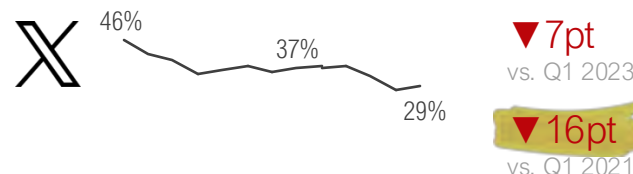
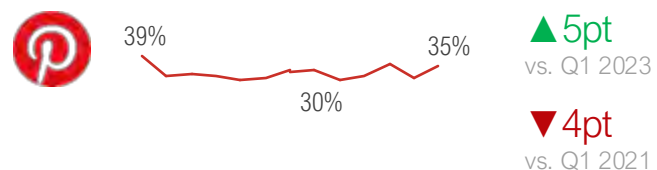
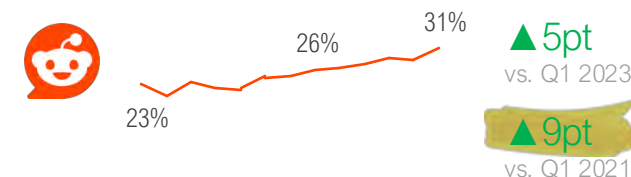
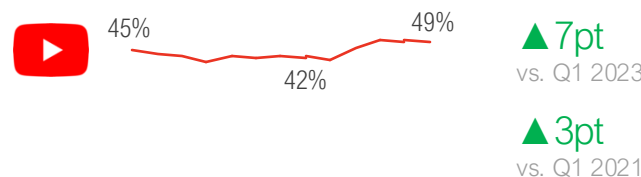
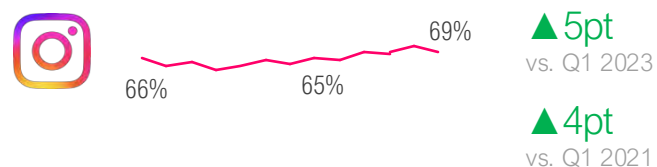
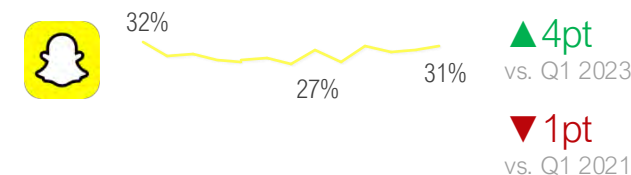
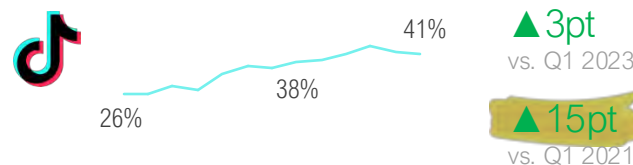
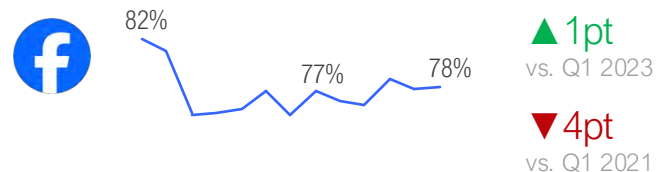


**The People  
The Place  
The Hawaiian Islands**





# Monitoring Social Media Engagement: Tracking Our Target Audience



# Shaping Strategy: How Social Media Attitudes Drive Content and Channel Choices

## % of HTT target who...

	<u>Δ vs. 2023</u>	<u>Δ vs. 2021</u>
Clicked on a promoted post or ad on IG (20%)	32%	41%
Searched for something on TikTok (14%)	37%	106%
Watched or Uploaded Content to IG Reels (35%)	23%	91%
Use YouTube Shorts Weekly or More (18%)	–	–

TikTok-style content continues to take hold among MHTTs across the social landscape

## Among top 3 reasons for using social media, % of HTT who chose...

Filling spare time (30%)	9%	40%
Posting about your life (17%)	4%	23%
Finding inspiration for things (e.g., places to visit, things to buy, etc.) (25%)	11%	40%

“Lean back” behavior is growing

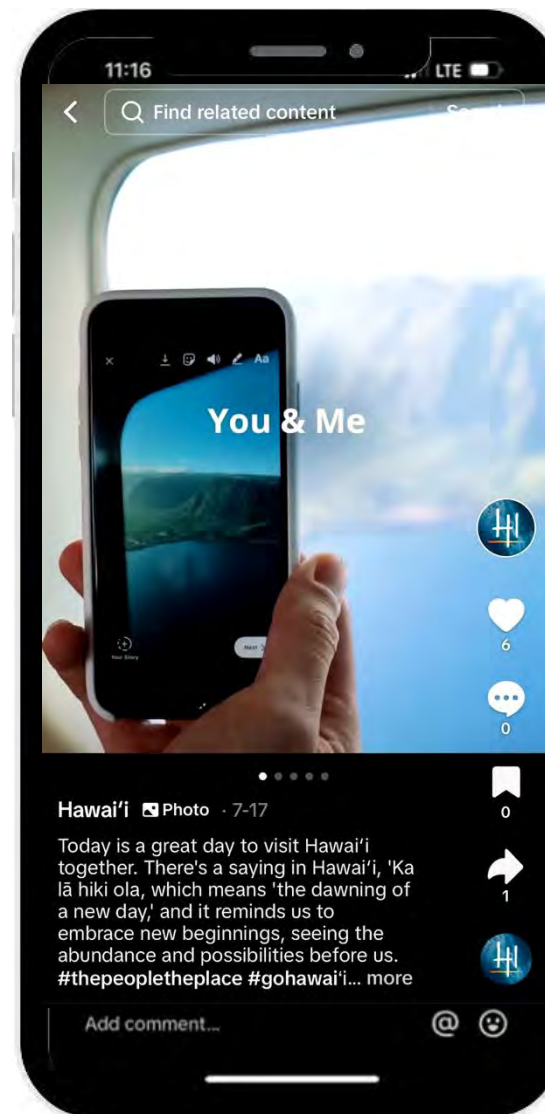
## % of HTT who say they hear about new products or services via...

“Social media posts” (47%)	12%	18%
“Ads on social media” (50%)	9%	24%
“Sponsored posts on social media” (32%)	31%	49%
“Recommendations from Friends/Family” (45%)	1%	20%

A combination of organic and paid social is critical for reaching and inspiring potential travelers



# Social Posts





**Branded Content**

# Branded Content Programs

## Condé Nast Traveler

Condé Nast  
**Traveler**

INSPIRATION DESTINATIONS PLACES TO STAY NEWS & ADVICE TRAVEL WELL SHOPPING CRUISE WOMEN WHO TRAVEL VIDEO

(De)tour by Condé Nast Mission Studio: Hawai'i  
Sponsored content by The Hawaiian Islands

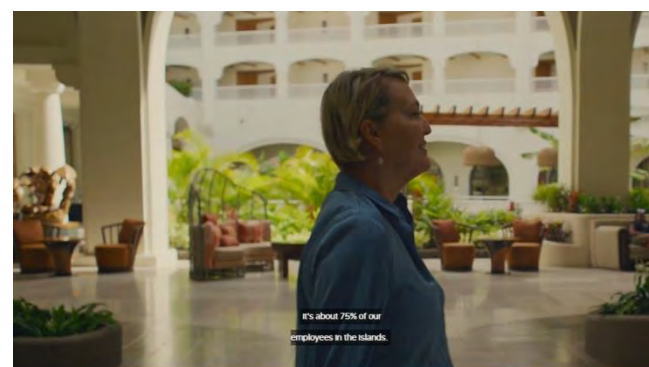
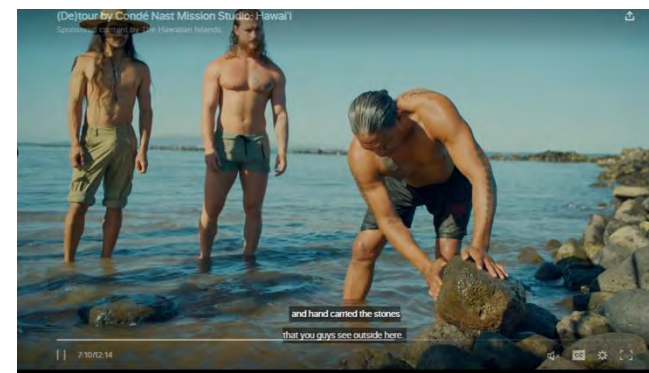
Produced by Condé Nast Traveler with The Hawaiian Islands

Condé Nast  
**Traveler**

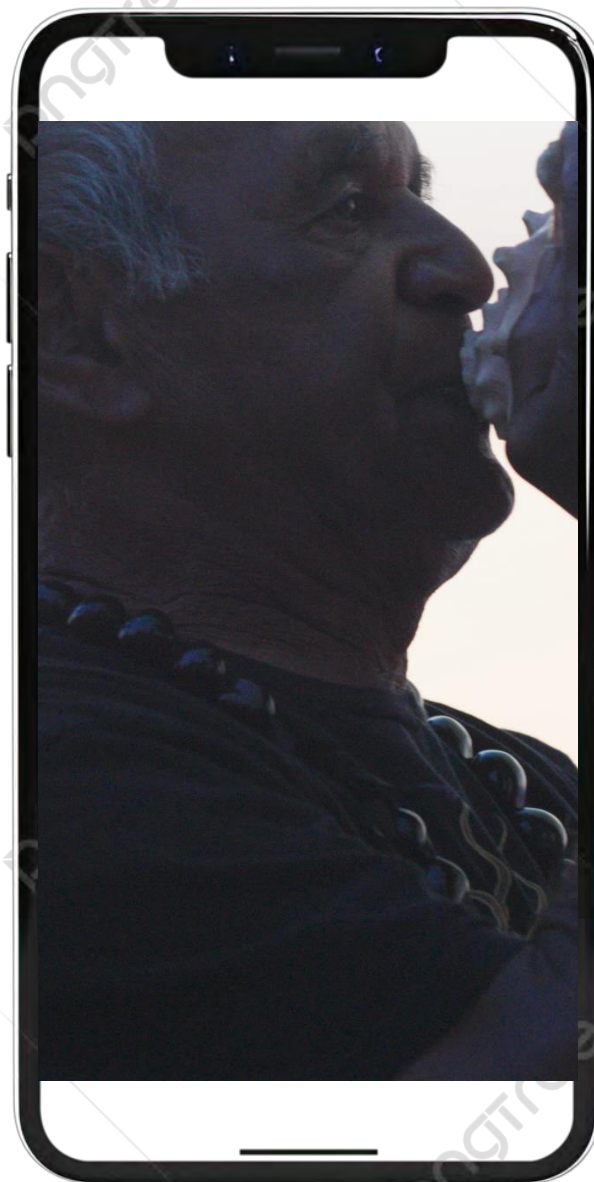
HAWAIIAN ISLANDS

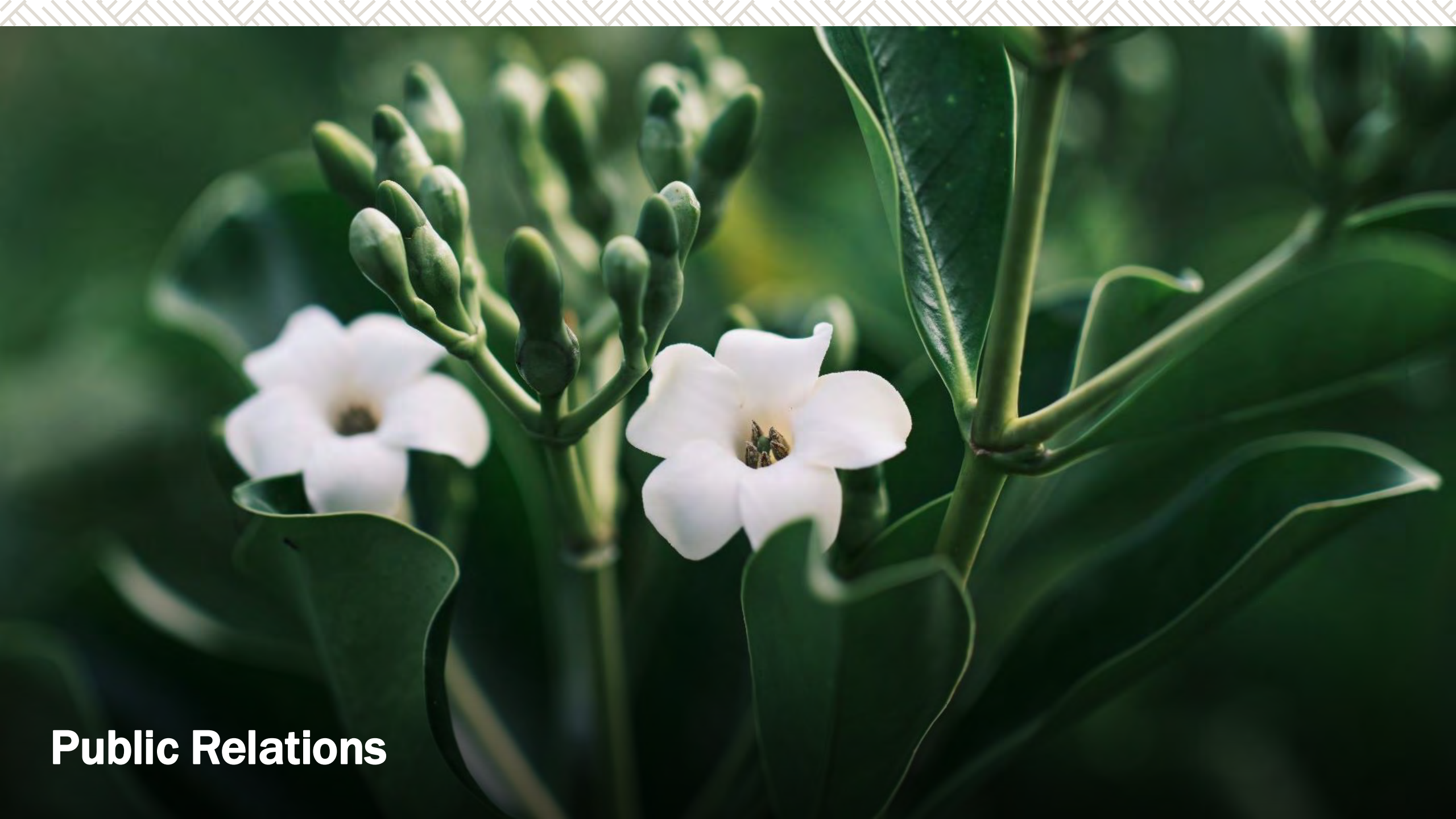
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(De)tour by Condé Nast Mission Studio: Hawai'i



## Branded Content Programs Matador Networks





**Public Relations**



# Public Relations

## Strategy

- Nurture and leverage key media relationships across the U.S. continent
  - New: Hot 100 List to include regional publications in key markets
- Keep Maui and the Hawaiian Islands top of mind
- Secure media visits highlighting the people and places that make Hawai'i special
- Focus: Stronger invitation to visit
  - Unique visitor experiences
  - Indigenous and local culture



# Public Relations

## Programs and Tactics

- Expanded Hawai'i presence at IMM
  - Jan. 22-23, 2025, New York
- Follow-up to 2024 LA Saturation
  - Coordinated with Travel Trade Educational Blitz
- Virtual Media Blitz
- Seek Broadcast opportunities
  - Confirmed for Q1: NBC's First Look (West Maui)





**Travel Trade**

# Travel Trade

HTUSA will leverage its influential travel trade relationships to deliver destination messaging and education to qualified travel advisors and their clients to keep Maui and The Hawaiian Islands top of mind. This will be accomplished through:

## Events and Training

- HTUSA Educational Blitz Events in the US
  - February – Key US West Markets
  - October – Key US East Markets
- Wholesale, Consortia, Industry Events
- Familiarization (FAM) Tours
  - HTUSA-led in-destination multi-island programs
  - Support for key partner-led programs



# Travel Trade

- Trade Marketing

- Paid Trade Media to drive website registrants and certification course completions

- Consortia Partnerships

- Signature Travel Network
- Travel Leaders Network
- Virtuoso

- Owned Database Communications to 45K+ active travel advisors

- Trade Content Development

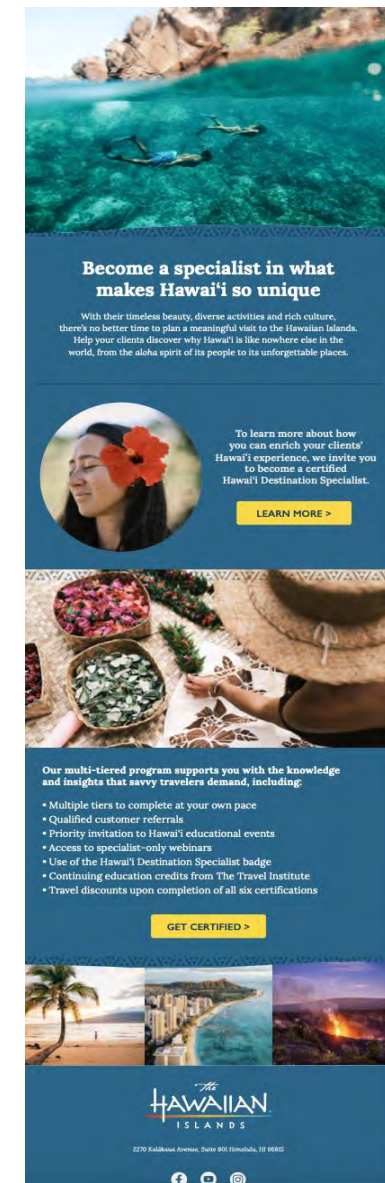
- Agents.GoHawaii.com
- Curriculum update of the Hawai'i Destination Specialist Program



### The People. The Place. The Hawaiian Islands.

Hawai'i is like nowhere else – and sharing the values of our people and encouraging visitors to experience our unique culture is what makes this place so special.

We invite your clients to see our islands' natural beauty in a new way, as the backdrop, while showcasing the beauty of our values as *kama'āina* (local residents). From the melodic sounds of Hawaiian music on Kauai to spreading *aloha* with fragrant *lei* on O'ahu. From the *malama* (care) of Native Hawaiian knowledge on the island of Hawai'i to using food to bring community together on Maui. We encourage visitors to seek engaging experiences when they come, which helps spread the benefits of tourism to broader communities throughout these islands.





# Partnership Opportunities

### 2025 PARTNERSHIP OPPORTUNITIES

HVCB Island Chapters Meet Hawai'i	ACTIVITY	DATE	DESCRIPTION	LOCATION	COST	CONTACT (Name & Email)
<b>CONSUMER PROMOTIONS</b>						
HVCB, KVB, OVB, MVCB, IHVB	Mālama Hawai'i Program – Volunteer Experiences	Ongoing	Visitors are encouraged to give back to the destination by participating in the Mālama Hawai'i Program. Volunteer opportunities are listed on gohawaii.com/malama via Kanu Hawai'i's dashboard.  Participate by offering a voluntourism activity.	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	\$0	Lei Field <a href="mailto:lfield@hvcb.org">lfield@hvcb.org</a>
HVCB, KVB, OVB, MVCB, IHVB	Mālama Hawai'i Program – Hotel Offers	Ongoing	In addition to promoting enriching volunteer experiences, hotel partners can build special Mālama Hawai'i packages to be listed on the Mālama Offers page.	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	\$0	Lei Field <a href="mailto:lfield@hvcb.org">lfield@hvcb.org</a>
HVCB	Hawai'i Statewide Visitors' Guide	Annual with mid-year updates	The Hawai'i Statewide Visitors' Guide (statewide with individual island sections for Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, and Island of Hawai'i) is published annually in digital format with dynamic listings. This is the official pre-arrival vacation planner for consumers. The guide receives targeted digital distribution modeled on Hawai'i first-party consumer data, as well as HVCB firmwide distribution and promotion throughout the year.  Various advertising opportunities are available.	U.S.	Varies	HVCB Membership Department: <a href="mailto:membership@hvcb.org">membership@hvcb.org</a>
HVCB, KVB, OVB, MVCB, IHVB	The Hawai'i Visitor Guidebooks: <i>Experience Kaua'i</i> <i>Experience O'ahu</i> <i>Experience Maui, Moloka'i, Lāna'i</i> <i>Experience Hawai'i Island</i>	Semi-Annual	The Hawai'i Visitor Guidebooks are the official post-arrival, island-specific guides for Kaua'i, O'ahu, Maui/Moloka'i/Lāna'i, and Island of Hawai'i. They are published semi-annually in print and digital formats for use in-destination to promote local activities, dining, shopping, products, and services. Distributed at airports and key strategic visitor locations on each island.  Various advertising opportunities are available.	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	Varies	HVCB Membership Department: <a href="mailto:membership@hvcb.org">membership@hvcb.org</a>
HVCB	Statewide Consumer Special Offers: GoHawaii App.	Ongoing	The GoHawaii app is a destination pre/post arrival tool to plan the most enriching Hawai'i vacation.  Partners submit consumer special offers.	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	Varies	HVCB Membership Department: <a href="mailto:membership@hvcb.org">membership@hvcb.org</a>
HVCB	Statewide Kama'āina Campaigns	Quarterly	Digital statewide campaign targeted to the kama'āina market, offering Hawai'i residents exclusive specials on accommodations, activities, attractions, shopping, dining, etc.  Partners provide kama'āina offers.	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	Varies	HVCB Membership Department: <a href="mailto:membership@hvcb.org">membership@hvcb.org</a>
HVCB	E-newsletter: <i>Islands of Aloha Express</i>	Monthly	The consumer e-newsletter offers partners an opportunity to reach up to 230,000 opted-in subscribers who have expressed an interest in traveling to the Hawaiian Islands. It includes stories about Hawai'i, a festivals and events calendar, travel planning tips, special offers, and downloadable wallpapers.	U.S.	Varies	HVCB Membership Department: <a href="mailto:membership@hvcb.org">membership@hvcb.org</a>



Mahala





# Los Angeles Market Activation

# Los Angeles Market Activation September



**Aloha Market with  
Mana Up**



**Long-term partnership  
meetings with L.A. Rams**

**Public/Private  
Media Blitz**

**Consumer Direct  
Coop Programs**



**The People, The Place, The Hawaiian Islands**

Organic & Paid Content

## Los Angeles Market Activation

PR Media Blitz: Sept. 17 – 19

- Objective:
  - Influence and inspire editorial coverage about the Hawaiian Islands
- Strategy:
  - HVCB: Brand building with destination trends and key updates
  - Partners: Keep Hawai'i top of mind, present media hosting opportunities
- Tactics:
  - One-on-one meetings with editors and freelancers in the LA area

**Outside** Los Angeles  
MAGAZINE

Los Angeles Times Forbes

JustLuxe TRAVEL+  
LEISURE

The New York Times USA  
TODAY

Fodor's Travel Smithsonian  
MAGAZINE

# Consumer Activation

## Aloha Market Pop-up: Sept. 20 – 22

- Mana Up Hawai'i partnership
- Heart of Abbot Kinney Boulevard, buzzy neighborhood with great foot traffic
- 6,000 sq. ft. of retail space featuring 50+ Hawai'i entrepreneurs
- Activations included workshops, demos and panels
- VIP Receptions excited media, influencers, travel advisors, MCI clients
- Local coverage on KTLA, ABC, FOX



10c

**Hawai'i Tourism Japan**



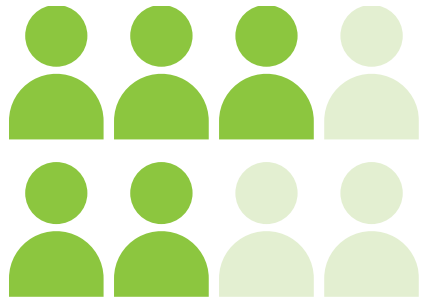
HAWAII TOURISM

JAPAN

2025 Brand Marketing Plan  
- Japan

Eric Takahata  
Managing Director

# JAPAN TRAVEL AND ECONOMIC RECOVERY



As of June, 61% of overseas trips from Japan have returned to pre-pandemic levels



Travel to Hawai'i is 44% of 2019 levels while maintaining a high, \$243 per-person, per-day spending



Japan's economy is expected to recover in the second half of 2024 with 1% projected growth in 2025



The yen's value continues to fluctuate, with forecasts ranging from 140 to 170 yen against the dollar

# EMERGING TRENDS

## CONSUMERS

Seeking eco-friendly products, personalized experiences, and health-conscious options

## DIGITAL/SNS

Use of AI is expanding to enhance personalized marketing

## MEDIA

Significant shift towards digital media with increased use of streaming services, social media, and subscription-based content replacing traditional TV and print

## TRAVEL TRADE

Short distance and domestic travel are gaining popularity, driven by economic factors, sustainability concerns, and demand for unique, eco-friendly travel experiences



Airline seat supply has recovered to 70% of pre-pandemic levels

Strong demand continues for premium and business class seats, while economy class still facing vacancies

Airlines are optimizing schedules and enhancing digital promotions to boost direct bookings, focusing on first-time travelers and group incentives

By 2025, airline seat capacity is expected to recover to 75% of 2019 levels, with strategic emphasis on attracting high-spending travelers to enhance overall market value

## AIRLINE TRENDS

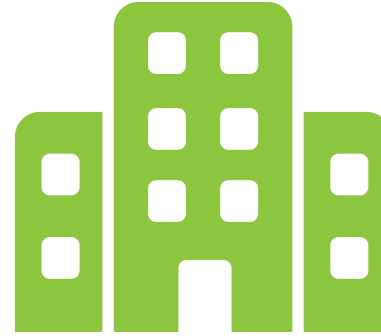
# COMPETITIVE LANDSCAPE



Okinawa is a main domestic competitor, while nearby international destinations like South Korea, Taiwan, and Guam vie for highly coveted Japanese travelers



Despite being the top desired destination by Expedia, Hawai'i ranks third in search interest and seventh in actual bookings



Hawai'i's hotel prices are significantly higher than Asia and Europe



To attract more travelers, Hawai'i must offer value-added services

# GEOGRAPHIC TARGETS



## MAJOR AREAS SERVED BY DIRECT FLIGHTS

- Kanto
- Kansai
- Nagoya (region)
- Fukuoka (region)

## SECONDARY AREAS WITH REGIONAL AIRPORTS

- Chugoku and Shikoku regions
- Tohoku
- Hokkaido (Sapporo)

## SISTER-CITIES

- Hokkaido
- Okinawa
- Fukuoka
- Hiroshima
- Yamaguchi
- Ehime

# TARGET AUDIENCE



Growth Experience  
Group (First Timers)



Partner Travelers  
(Couples)



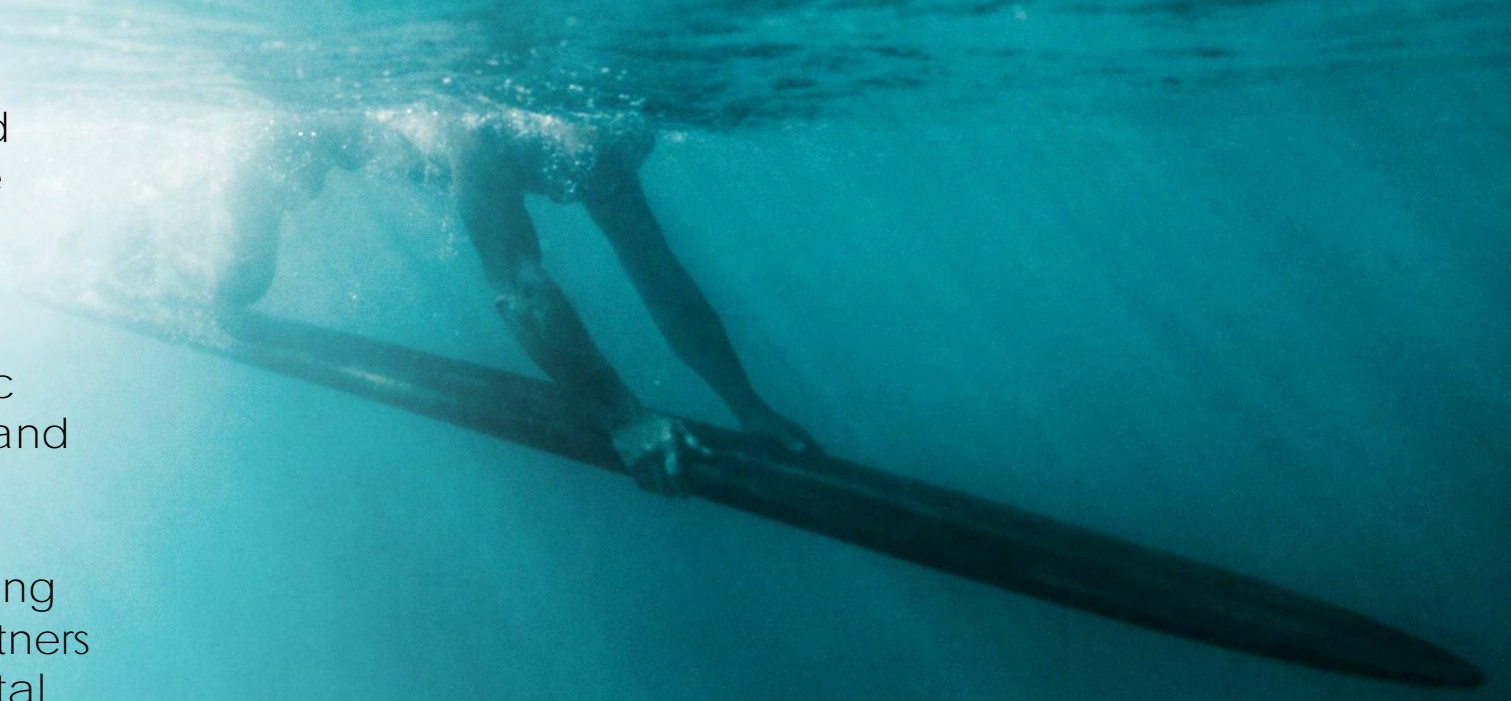
Power Families  
(Three-Generation)



Millennials  
(Young Adults)

# CONSUMER

- Address Hawai'i's drop in ranking by promoting value-added packages and experiences
- Create targeted campaigns emphasizing cultural, ethical and historical experiences to engage younger audiences
- Invest in storytelling and visual campaigns that depict authentic island life using digital platforms and owned media
- Strengthen island-specific branding by collaborating with media partners and increasing presence on digital platforms to drive bookings





## TRAVEL TRADE

- Collaborate with major wholesalers and OTAs to drive demand during off-peak periods
- Increase FAM trips, organize regular seminars and webinars, develop updated educational materials, and accelerate industry professional training initiatives
- Leverage airline partnerships for joint advertising and promotional activities to stimulate and expand travel demand



# PUBLIC RELATIONS

- Enhance media outreach efforts by proactively pitching tailored plans to targeted media and freelancers
- Strengthen owned media by developing specific messaging for each visitor audience and deliver personalized content to increase engagement
- Promote regenerative tourism and cultural sensitivity that supports responsible travel to Hawai'i



# ISLAND DISTRIBUTION

- Develop and share immersive videos and content highlighting each island's unique experiences
- Collaborate with airlines, travel agencies and OTAs to strengthen island branding, and create tailored products that showcase the distinct features of each island
- Work closely with the HTA and Island Chapters to align DMAP messaging across various communications channels





# RECOVERY CO-OP

Support promotional efforts of select airlines, wholesalers, OTAs and credit card companies to optimize resources and expand reach

**Ciao HIS HAWAII TOURISM JAPAN**  
パンフレット有効期間 2024.8.1-2024.10.31

## ハワイホノルル

東京発【成田・羽田】・大阪発・名古屋発・福岡発・札幌発・中四国発 全国各地からもご参加可能

- 1 HISだけの特別プラン**  
眺めのよい高層階指定プランと充実のホテルラインナップ
- 2 早めの予約がお得!**  
120日前までの予約で「ウルフキヤング・ステューブハウス」でのディナーと3つから選べる特典をご用意!
- HISの安心**  
HISの現地支店が24時間日本語サポート

「心算る」を好き放題 **HIS**

旅行代金は積み込み代金表をご参照ください

## ルックJTBでハワイへ

ハワイ州観光局からのメッセージ

ハワイの旅をもっと素敵に!  
ビーチもショッピングも両方楽しみたい!  
憧れのホテルに泊まりたい!  
旅のスタイルに合わせてホテルや過ごし方のアレンジも自由自在!

アロハ! ハワイは、美しい自然や独自の文化、ショッピング、グルメ、アクティビティなどの多様な観光資源が揃い、若者男女が安心して解放的になれる、昔も今も変わらず最高の楽しみ方を見つけることができる海外旅行先です。暑さや汗のための三世代旅行、30代前後でできなかったハネムーンや海外旅行、もう一度思い高い時を過ごすための記念日旅行、頑張った自分へのご褒美旅行など、大切な人と特別な時間をぜひハワイでお過ごしください。皆さまのご来店を心よりお待ちしております。

ハワイの基本情報

- 日本との時差は+19時間
- 年間を通して平均気温は25度前後で気候も安定しており過ごしやすい。

**KAUAI** カウアイ島  
何百万年もの歳月を費やして自然が磨き出した、透き通るようなブルーの海。

**O'AHU** オアフ島  
ビーチショッピング、グルメに大自然とすべてが揃ったリゾートアイランド。人気のワイキキエリアだけでなく、観光のバリエーションも広々としたビーチなども魅力。

**MAUI** マウイ島  
美しいビーチやオアフのハワイの魅力を倍楽しむなど、自然との触れ合いが楽しめる島。

**HAWAII** ハワイ島  
ハワイ諸島最大の島で、キラウエア火山と自然の奇蹟を体験。

オアフ島 MAP

35 フォーシーズンズリゾート オアフアウトコスタ

34 アウラニディズニーリゾート&スパオホリナハワイ

33 オカハマホテル&リゾート

旅、はじめるなら  
やっぱり  
HAWAII

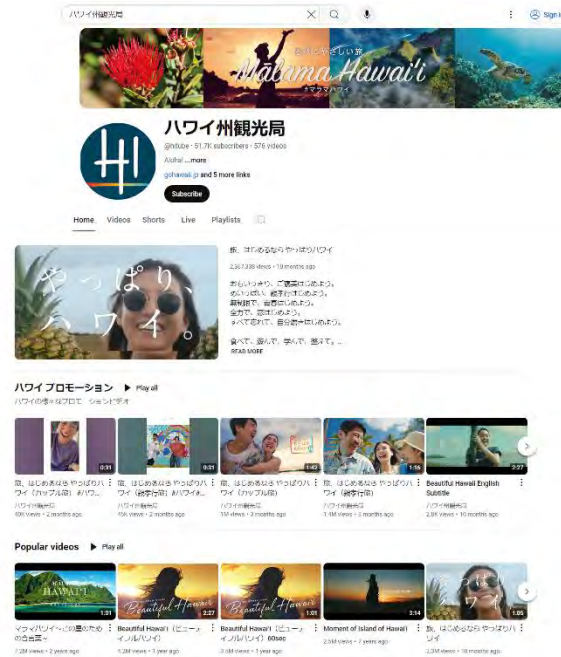
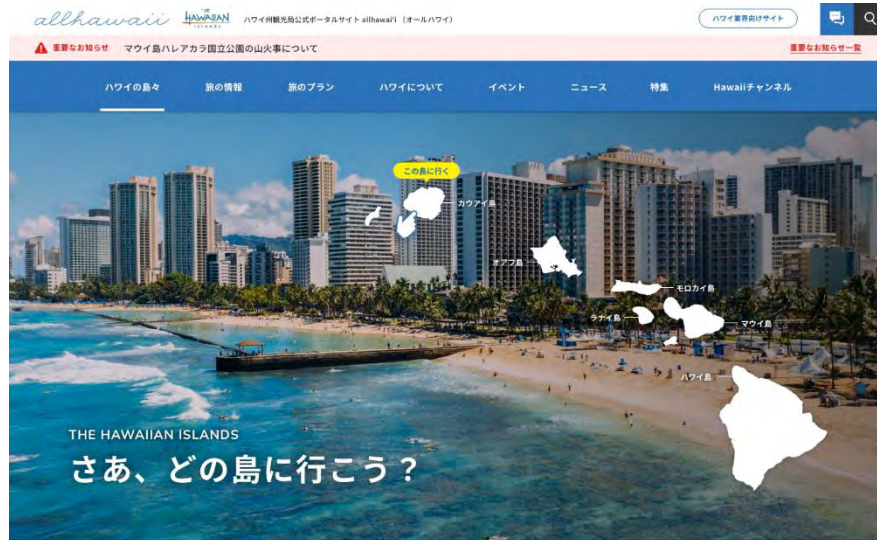
# BEAUTIFUL HAWAI'I - ISLAND BRANDING

Build on the momentum of the earlier campaign by delving deeper into the unique branding of each Hawaiian island, enhancing their distinct identities, and strengthening partnerships with industry partners



# DIGITAL MARKETING INITIATIVES

Redesign and launch allhawaii.jp, and assess and enhance social media channels



# PARTNERSHIP OPPORTUNITIES

<b>Opportunities</b>	<b>Date</b>	<b>Point of Contact</b>
Japan Summit	April	sales@htjapan.jp
Hawai'i EXPO	May	hawaiiexpo@htjapan.jp
Media Event	September	prhtj@htjapan.jp
FAM Tour	Throughout the year	sales@htjapan.jp
Press Tour	Throughout the year	prhtj@htjapan.jp

MAHALO!

HAWAII TOURISM™

JAPAN

10d

**Hawai'i Tourism Canada**



## **2025 Brand Marketing Plan**

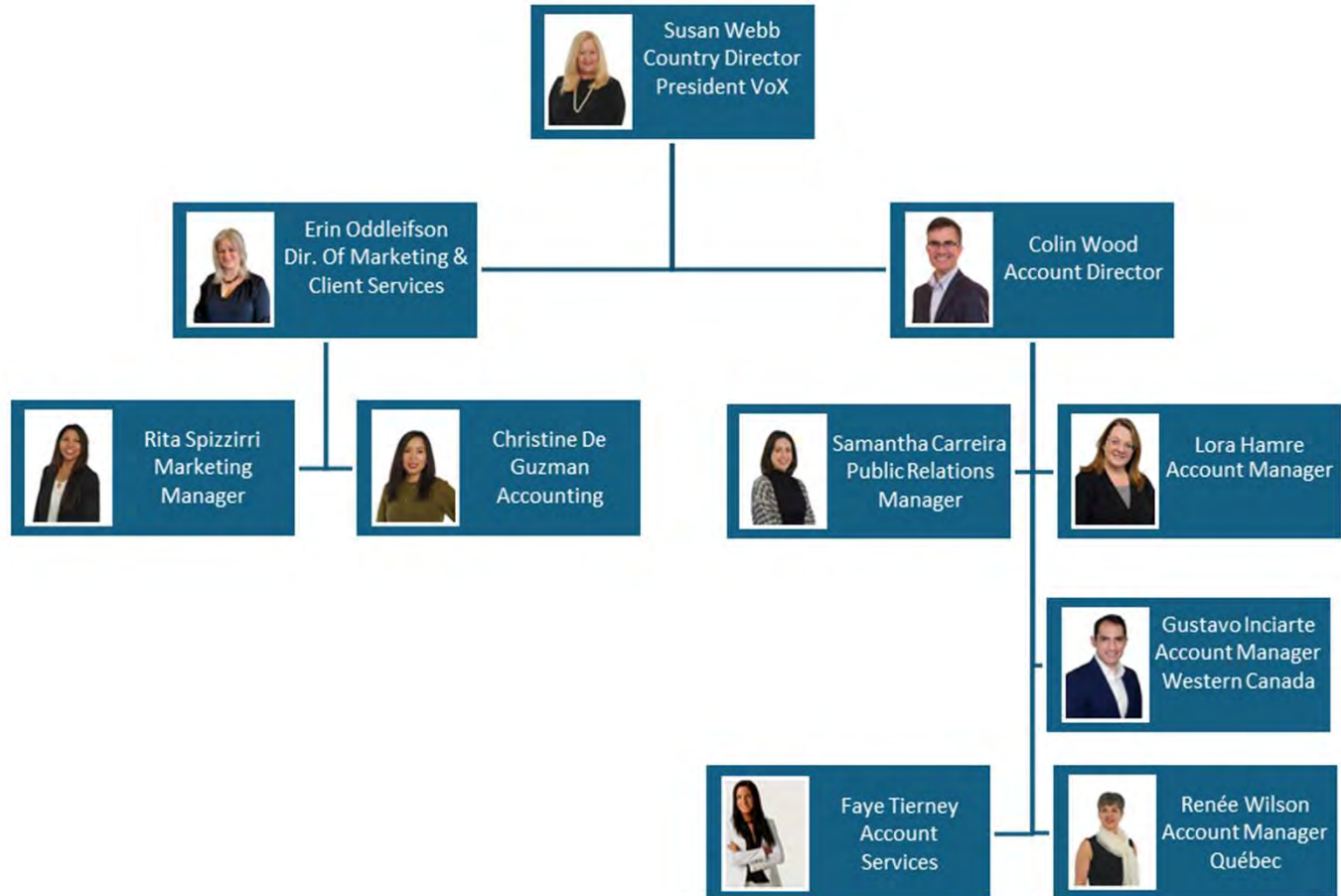


Susan Webb – President  
Colin Wood – Account Director





# HAWAI'I TOURISM CANADA TEAM





# MARKET SITUATION

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HAWAII TOURISM  
CANADA



# CANADIAN MARKET SNAPSHOT

- Consumer confidence slowly improving
- Unemployment rate 6.6% (highest in seven years)
- Interest rates fallen to 4.25% and predicted to drop further
- CAD \$0.74 USD still a concern (\$0.77 two years ago)

That said...





# COMPETITIVE ENVIRONMENT

## Canadians are really traveling!

- First half of 2024 up 11% YOY (16.8M)
- Now 97% of 2019 outbound travel
- Europe & UK up 10% YOY
- Asia & Oceania up 30% but still only 83% of 2019 visits
- Caribbean, Mexico, Central America up 9% YOY and 2% increase over 2019



\*Conference Board of Canada August 2024  
Outbound Report Data



## KEY CANADIAN STATS

### January to July 2024

- Second largest international market: 261k visitors
- Length of stay: 11.23 days
- Visitor Expenditure: \$645M
- Per Person Per Trip: \$2,470
- First Time: 34.6%
- Leisure: 91%



\*HTA July 2024 Data



## January to July 2024

- By Island
  - O'ahu 146k
  - Maui County 97k
  - Island of Hawai'i 46k
  - Kaua'i 28k
- Average Age: 48
- Average Party Size: 2.3

\*HTA July Data

## KEY CANADIAN STATS





# TODAY'S CANADIAN TRAVELER

## About Us

- 67% with passport vs 46% of Americans
- Second highest global market for anticipated average leisure travel spending annually\*
- Longer trips than the global average but...

Looking for value and travel hacks to save money.



\*AMEX 2024 Global Study



# TODAY'S CANADIAN TRAVELER

- Prioritizing spontaneous, bucket list, and once in a lifetime vacations
- Trend back towards travel agents for multi-element travel
- Solo travel, self-fulfillment, and sustainable travel segments are trending





## AIR OVERVIEW - SEATS

Route	Frequency	Season
YVR-HNL	1 / day	Year-round
	2 / day	Oct 27 – Apr 30
YYZ-HNL	2 / week	Dec 6 – Mar 28
YVR-KOA	3 -4 / week	Oct 27 – Apr 30
YVR-OGG	1 / day	Oct 27 – Mar 29



AIR CANADA

An overall reduced schedule from 2023.  
Toronto to Maui 1/wk cancelled.

Route	Frequency	Season
YVR-HNL	11-12 / week	Nov – April
YYC-HNL	3-4 / week	Nov – April
YEG-HNL	1 / week	Nov – April
YVR-KOA	2-4 / week	Oct – April
YYC-KOA	2-3 / week	Oct – April
YVR-LIH	2-4 / week	Oct – April
YVR-OGG	1-2 / day	Oct – April
YYC-OGG	3-4 / week	Oct – April
YEG-OGG	1-2 / week	Nov – April



For full winter season, WestJet has increased average capacity to O'ahu by 4%, Kaula'i by 27%, and I of Hawaii'i by 9% YOY, while Maui has decreased by 23%.



# REMAINDER OF 2024 – LARGER INITIATIVES

## Travel Trade FAMs

- Air Canada Vacations - O'ahu & Maui

## Consumer Direct Media

- National Digital & Social executions

## Travel Trade Shows

- Air Canada Vacations & Maritime Travel

## Aloha Canada

- Vancouver, Toronto, Calgary - Oct 21-24
- Media Events Vancouver & Toronto
- 16 partners attending





# 2025 TARGET AUDIENCE

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HAWAII TOURISM  
CANADA

# TARGET AUDIENCE

- Experience Seekers
- Affluent Travelers
- Snowbird/Retirees
- 70% of visits come from British Columbia & Alberta, but Ontario over indexes with 36% of the desired audience

Age range 35-49; Income range \$100k+  
Took an international trip in the last 12 months

Age range 50- 64; Income range \$150k+  
Took an international trip in the last 12 months

Age range 35-64; Income range \$100k  
Took an international vacation by air in the last 12 months

Age range 64+; Income range \$100k+  
Most recent visited destination Hawai'i

Mindful Travelers

High spending traveler

High value traveler

Lifetime value traveler





# STRATEGY & TACTICS

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HAWAII TOURISM  
CANADA



# CONSUMER DIRECT STRATEGY

## Reinforce Hawai'i as...

- Warm, welcoming, beautiful, relaxing
- Incredible and unique experiences

## Incorporating...

- Mālama, Kuleana & Ho'okipa messaging

## And utilizing...

- People, Place, Culture resources, with an emphasis on video
- More direct CTA inclusions to increase targeted audience bookings





# CONSUMER DIRECT TACTICS

## Social Media

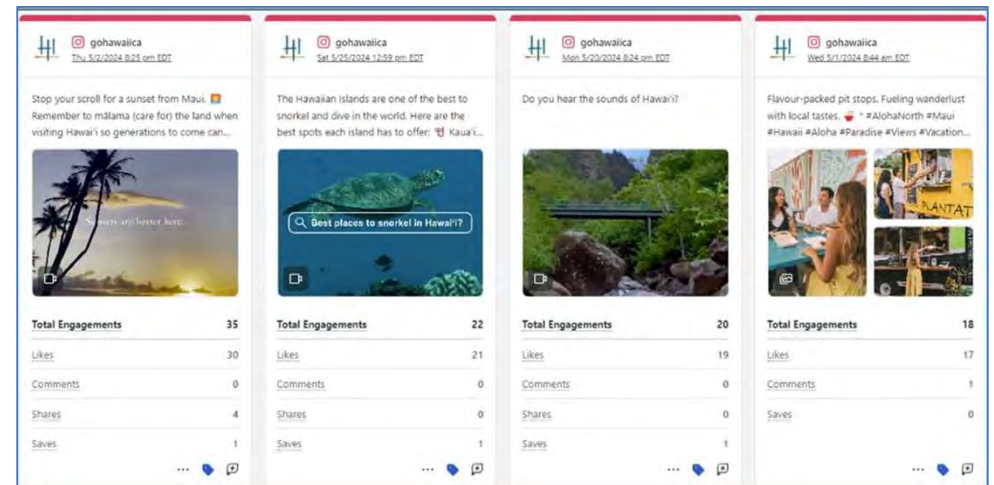
- Canadian channels
- Organic and paid media

## Digital Campaigns

- Online Video
- Connected TV
- Display Advertising

## Out Of Home

- Public Transit Activations
- Digital Billboards





## NEW in 2025

- o Greater inclusion of airline booking partners as a CTA option in consumer direct campaigns, promotions, and assets, driving lower into the booking funnel



# CONSUMER DIRECT TACTICS

**Maui moments await.**

Non-stop flights from Vancouver.

*The* HAWAIIAN ISLANDS

**WESTJET**

Photo credit: Hawaii Tourism Authority (HTA) / Tor Johnson







# PUBLIC RELATIONS

## 2025 Planned Activities

- Group Media FAM - Fall 2025
- Year-Round Individual Media Visits
- Press releases, media monitoring & ongoing pitching
- Discover America Canada Day 2025
- Aloha Canada Media Interviews & Reception
- More Broadcast Television Segments





# TRAVEL TRADE ACTIVITY

## 1. Communications

Utilize key travel trade media platforms to educate, inform, update Advisors and product decision makers

**TravelBlast**

**HAWAII**  
Hawaiian Paradise

LEARN, HAVE FUN, AND WIN!  
Become a Hawaii's Destination Expert for your chance to:

**WIN!**

**The Hawaii's Destination Specialist Training**  
It's simple, informative, and fast!

The award-winning seminar at 11am and 1pm provides you with the latest information on all that Hawaii has to offer and why it's the perfect place for your business. This is a chance to learn from the experts and meet with award-winning speakers to discuss your business.

**Exclusive for you:**

- Expert Insights
- Exclusive Access to Hawaii's Top Travel Experts
- Access to Exclusive Travel Packages
- Meet with Hawaii's Top Travel Experts
- Exclusive Access to Hawaii's Top Travel Experts
- Exclusive Access to Hawaii's Top Travel Experts

Complete the Hawaii's Destination Specialist Training and receive a complimentary Hawaii's Destination Specialist Training Kit.

1st prize \$500 | 2nd prize \$250 | 3rd prize \$100

[CLICK FOR MORE DETAILS](#)

Event organized by meeting.com prior to 2011, on all dates prior to 2011. For more details see registration. Please contact us for more details or visit us at www.hawaii.com/traveltrade.

**TravelBlast**

**MAUI**  
One of the HAWAIIAN ISLANDS

Maui Moments Await

Our communities are still healing from the disaster we have experienced. Respectfully visiting Maui right now means following all of the rules and regulations. Respectful travel during this time can include the following: participating in a volunteer experience to give back to the affected communities, donating time/money/resources to those affected, supporting and buying local while on Maui, and more. Mahalo and we look forward to seeing you soon!





## 2. Education / Training

Combination of webinars, in-person activities, and releasing bite-sized content.

- Destination Specialist Program
- Aloha Canada 2025
- Trade FAMs
- Partner Shows / Launches



# TRAVEL TRADE ACTIVITY





### 3. Partnerships

HTCAN's partners are crucial to booking results and traveler education

- Co-operative campaigns offering access to high probability strategically targeted travelers



## TRAVEL TRADE ACTIVITY





# TRAVEL TRADE ACTIVITY

## NEW Trade Partner Campaigns for 2025

- Costco Travel
  - Air Miles (Loyalty Program)
  - Flight Centre
- 
- Co-operative 1:3 Value
  - Required Traveler Education elements within all 3 campaigns





# PARTNERSHIP OPPORTUNITIES

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HAWAII TOURISM  
CANADA



# PARTNERSHIP OPPORTUNITIES

- Agent Focused Trade Shows
- Aloha Canada 2025
- Agent Focused FAMs
- Webinar Support
- Individual Press Trip Support
- Group Media FAM Support
- **New!** Social Media Posting Program

Please contact HTCAN for details.



**MAHALO!  
THANK YOU  
MERCI**





10e

**Hawai'i Tourism Oceania**



# **2025 Brand Marketing Plan**

Darragh Walshe  
Tourism Director, HTO

# HAWAI'I TOURISM OCEANIA TEAM



**Darragh Walshe**  
Tourism Director



**Jennifer Gaskin**  
Account Director



**Anna Riedel**  
PR & Trade Manager



**Maree Robinson**  
Marketing & Campaigns  
Specialist (NZ)

# **MARKET SITUATION**

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Jan - Jul 2024

Visitor \$  
**292.4M**

Length of stay  
**8.71**

Total Arrivals  
**114,654**

Flights  
**585**



# COMPETITIVE LANDSCAPE

## Australia

2019	2024
New Zealand	Indonesia ↑
Indonesia	New Zealand
USA	USA
UK	UK
China	Japan ↑

## New Zealand

2019	2024
Australia	Australia
USA	Fiji ↑
Fiji	USA
China	China
UK	UK

# STRATEGIES

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# KEY CAMPAIGN THEMES

**People,  
Place &  
Culture**

**Sustainable  
Destination**

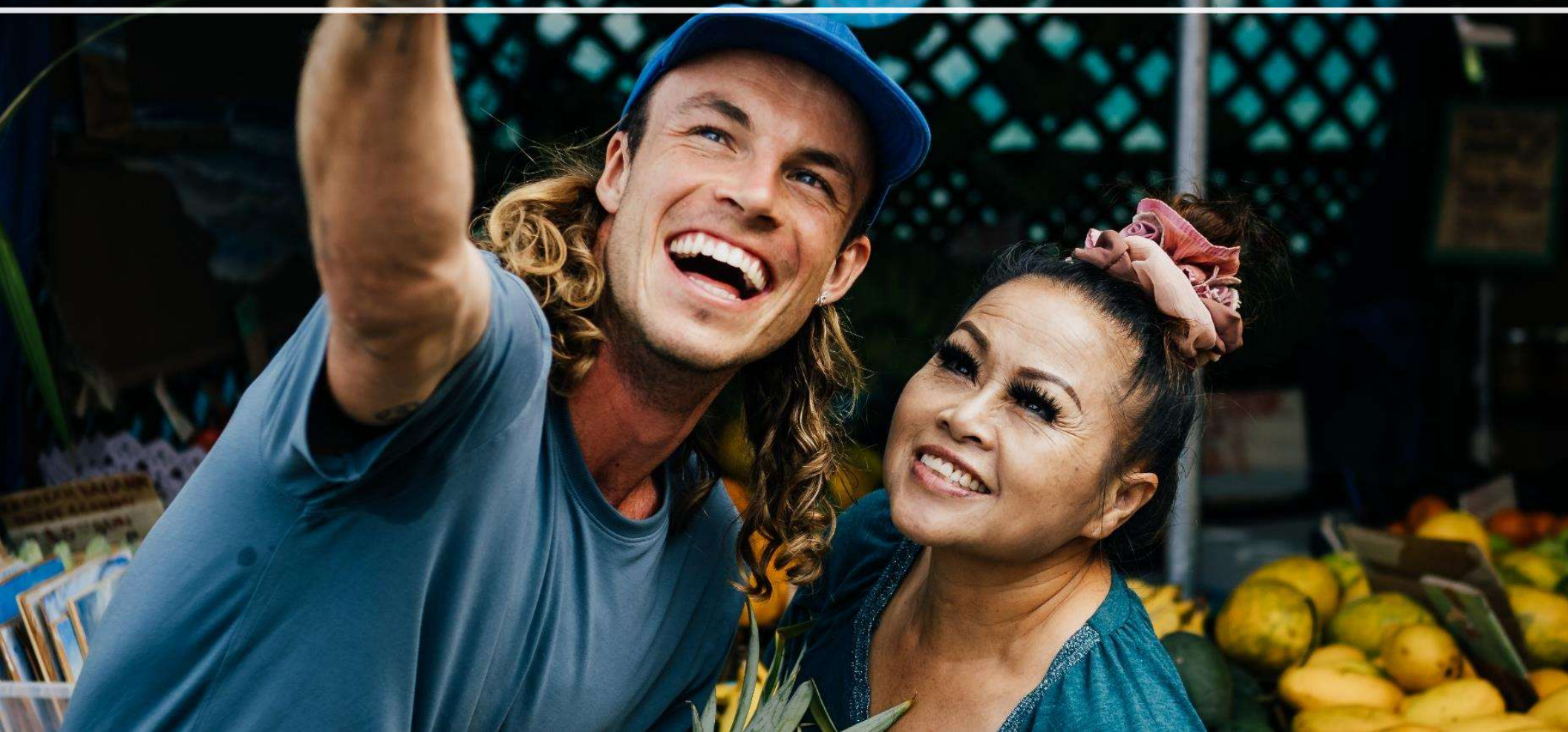
**Beautiful  
Scenery**

**Relaxation**

**New Things  
to Explore**

**Volunteer/  
Give Back**

**WE ARE EXPLORERS**





# MAJOR PROGRAMS

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# MAJOR PROGRAMS

## The People, The Place, The Hawaiian Islands

Using the assets created for this campaign, we will create a media plan to promote this campaign across a variety of media and locations, including:

- YouTube
- Native content placements and digital ads with online and print publications
- Paid social media
- Film festivals – Ocean Film Festival and Sunset Cinema
- Outdoor advertising
- Banner ads as part of co-op campaigns





# MAJOR PROGRAMS

## Month of Lei

We will execute our annual Month of Lei roadshow again in 2025. This is a series of trade training events with the Island Chapters throughout Australia and New Zealand. This gives travel agents the opportunity to hear directly from the Island Chapters, something they find incredibly valuable.

We will also launch an incentive famil campaign through trade media, giving five agents who book multi-island itineraries the chance to win a famil to Hawai'i.



# MAJOR PROGRAMS

## Aloha Down Under

Our main signature roadshow, Aloha Down Under will return in 2025. Events will take place in five cities across Australia and New Zealand, and will include trade, media and product manager events.





# MAJOR PROGRAMS

## Co-op Strategy

This year, we will increase the percentage of our budget spent on co-ops in order to drive incremental visitation and expenditure. We will focus on partners with the potential to target our ideal traveler and who are also able to work with us in sharing a responsible tourism message.

### Suggested partners are:

- Flight Centre (AU&NZ)
- Travel Associates
- MyHawaii
- Expedia
- House of Travel (NZ)
- Luxury Escapes
- Helloworld (AU&NZ)
- Qantas

**Travel IQ Hawaii**

**Aloha, Waikiki**  
Hawaii's most famous beach is a heady mix of sun, surf, the luxe life and simple family fun times.  
BY STACY BRIDLEY HOWELL

**DIAMOND HEAD STATE MONUMENT**  
There's a strong story in parts, to the top of Diamond Head, but there's a small fee for entry, but the reward is stunning views, local history and a taste of what's right about Hawaii. It's a popular and exposed to the elements, so be sure to bring a hat and sunscreen.

**US ARMY MUSEUM OF HAWAII**  
This new gift museum, in a 1951 defense building, has been built to honor the military service members who served in Hawaii during World War II. It's a place where you can learn about the history of the island and the role of the military.

**TASTES LIKE HOLIDAY**  
You can't spend all day on the beach in Waikiki, but there are some experiences you can't miss. This is the land of the pineapples, traditionally topped with hula, so hit a local supermarket for a pineapple, and you'll be in good luck.

**WAIKIKI HISTORIC TRAIL**  
Waikiki Historic Trail signs point the way on a free and guided walk of Waikiki history and culture, all day from 10 a.m. to 5 p.m. Along the route, meet a guide of Waikiki history, the "Land of Modern Hula," and a lot of other fun facts, maps to imagine that the way when someone were once traditional hula halls and fish trap ponds.

# MAJOR PROGRAMS

## Travel Agent Self Famil Program

We always receive a number of enquiries for travel agents who are traveling to The Hawaiian Islands and want to access trade discounts, Currently, we have a PDF document which is updated yearly and travel agents are able to access this and contact partners directly for discounts. However, we would like to expand this program to allow us to better measure who is accessing these discounts and collate feedback.

We will revamp the page to include itineraries, create Google maps that agents can use for inspiration and have a system for them to properly apply to access the discounts.



# MAJOR PROGRAMS

## Freshwater Event

Promote the legacy of Duke Kahanamoku and travel to Hawai'i to the Freshwater community through sponsorship of this annual event

We will sponsor this event in its second year of return since Covid. This is an important event honoring the place Duke Kahanamoku surfed in Australia. The multi-day event promotes the connection between Australian and Hawaiian cultures, especially around ocean sports and care for the environment.



# MAJOR PROGRAMS

## Ocean Swim 2025 – Swimcation event

We will bring the very successful Fiji Ocean Swim event to Hawai'i for the first time. An event which attracts a high-spend participant who has a passion and connection to the outdoors, in particular the ocean.

The Ocean Swim event (held in Fiji) attracts 250 people who travel to enjoy a vacation that centres around 3 days of swim experiences/social races. The event has a strong connection and partnership with the local community to help create an experience that combines a love for swimming and for the ocean with a chance to experience a new place and local experience. The average age of attendee is 54 years with 70% of them being women. The targeted countries are New Zealand, Australia, Asia, North America, Canada.



**MAHALO!**

1 Of

**Hawai'i Tourism Europe**



## 2025 Brand Marketing Plan



Andreas Schunck  
Account Director, HTE



GENERAL  
ECONOMY  
September  
2024

Unemployment  
UK  
4.2%

Unemployment  
DE  
3.7%

Unemployment  
CH  
2.1%

Inflation Rate  
UK  
2.2%

Inflation Rate  
DE  
1.9%

Inflation Rate  
CH  
1.7%

Exchange Rate  
UK  
1.32 USD

Exchange Rate  
DE  
1.11 USD

Exchange Rate  
CH  
1.17 USD





GENERAL  
ECONOMY  
September  
2024

GDP UK  
Annual growth  
rate 2024: 0.3%  
Expected rise  
to (early 2025):  
1.4%

GDP DE  
Annual growth  
rate 2024: 0.3%  
Expected rise  
to (early 2025):  
1.1%

GDP CH  
Annual growth  
rate 2024: 1.2%  
Expected rise  
to (early 2025):  
1.7%

GfK UK  
Consumer  
Confidence:  
-11  
(improved from -13 in  
Jul and highest level  
since Sep 2021)

GfK DE  
Consumer  
Confidence:  
-9.9  
(slight improvement  
due to rising income  
expectations)

SECO CH  
Consumer  
Confidence:  
- 35  
(improved from  
-41 driven by positive  
financial outlook)



## OUTBOUND TRAVEL EUROPE

Outbound travel from Europe continues to demonstrate significant growth.

- 86.2 million UK residents' travel abroad in 2023.
  - 92% of pre-Covid 2019 levels
- 122 million Germans are projected to travel abroad in 2024.
  - Surpassing the pre-pandemic high of 116.1 million in 2019.
- UK residents' overseas trips expenditure
  - £72.4 billion in 2023 (plus £13.9 billion from 2022)
- German residents' overseas trips expenditure:
  - **€86.9 billion in 2023** (€80.1 billion in 2022 & €73.1 billion in 2019).
- 2.12 million UK residents visited the US in the first half of 2024
  - 15.7% increase from 2023 and just 5.1% below the same period in 2019
- 888,880 Germans visited the US in the first half of 2024
  - 13.3% increase from 2023 and just 4.5% below the same period in 2019



## TRAVEL TRENDS EUROPE

- Increased demand for unique destinations: More unique, off-the-beaten-path destinations.
- Sabbatical and Workation Travel: Longer sabbaticals and workations, combining work, adventure, and relaxation.
- Experience-Driven Travel: Preference for cultural explorations, local experiences, and nature-based activities.
- Luxury and Wellness Travel: Rising demand for high-end resorts and wellness experiences focused on relaxation and well-being.
- Sustainability and Responsible Tourism: Increasing demand for eco-friendly destinations and sustainable travel options, including:
  - Voluntourism
  - Wildlife conservation
  - Responsible tourism initiatives



## COMPETITIVE LANDSCAPE EUROPE

- UK consumers are searching New York, Orlando, Dubai, Barbados, Cancun, Maldives, Dominican Republic, and St Lucia, according to BA Holidays.
- The German Travel Association (DRV) reports strong interest in long-haul destinations such as the US, UAE, Thailand, Japan, Maldives, and Mauritius.
- Swiss travelers, buoyed by the strong franc, are increasingly interested in long-haul destinations like the USA, Japan, and Australia.
- YE August 2024, the Maldives welcomed:
  - 106,161 tourists from the UK (+3% YOY)
  - 87,608 from Germany (+2.6% YOY)
  - 24,867 from Switzerland (+2.1% YOY)
- Fiji reported record visitor arrival and expenditure in July 2024:
  - Arrival growth from Europe +19% YOY (2,658 visitors)
  - UK +7% YOY (1,154 visitors)





## MARKET POTENTIAL EUROPE

- Economic recovery is projected for 2024 and 2025.
- Consumer confidence boost and increased (travel) spending power expected.
- Current record highs in overall spending and share of long-haul trips:
  - In 2023, long-haul travel among German travelers accounted for 9% of all trips aboard, up from 8% in 2019, marking an all-time high.
- Growing demand for luxury, sustainable holidays, beach vacations, and cultural experiences.
- Increase in air capacity to the US from Europe.
- **Hawai'i Tourism Europe's 2025 BMP**

A person is swimming in the ocean, with a large mountain range in the background. The text "2025 STRATEGY" is overlaid on the image.

# 2025 STRATEGY



## TARGET AUDIENCE EUROPE

- Mindful High Value Travelers:
  - Spend & disperse more
  - Stay longer
  - Eager to deepen their cultural understanding
- High-Value Travelers from the UK, Germany, and Switzerland:
  - Approx. 15-20 million
  - Earn a minimum of \$90,000 to \$110,000 p.a.
  - High-Net-Worth Individuals population approx.. 2.7 million
  - Spend between \$3,500 and \$5,500 per trip to the U.S.

# CONSUMER STRATEGY EUROPE

## Awareness Objectives:

- Enhance **Hawai'i's brand awareness**, build trust, credibility and recognition.
- Focus messaging on responsible tourism, diversity of **Hawai'i's** people and culture, natural beauty, and relaxation.
- Regain market share

## Consideration Objectives:

- Deliver personalized content to educate audiences on the Hawaiian Islands.
- Encourage planning and interaction.
- Drive traffic to **HTA's platforms** and increase data collection.

## Conversion Objectives:

- Partner with tour operators, airlines, and affinity brands to expand reach.
- Drive traffic to partner campaign pages and stimulate bookings.

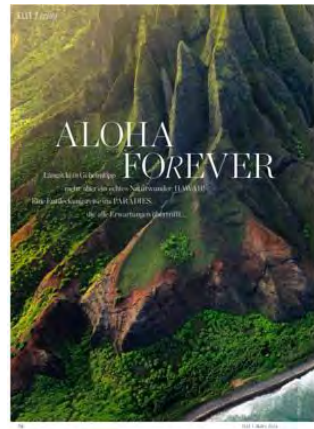






# PR STRATEGY EUROPE

- **Protect and enhance Hawai‘i’s brand** by highlighting its culture, environment, and preservation efforts.
- Engage with key traditional and digital media (consumer and travel trade).
- Share compelling news updates and destination stories.
- Educate audiences through:
  - Press releases & pro-active story pitching.
  - Media calls and networking events (e.g., Visit USA Media Marketplace 2025).
  - Individual and group press trips (2 x groups and 2 x individual in 2025).



# TRAVEL TRADE STRATEGY EUROPE

The travel trade is crucial in Europe:

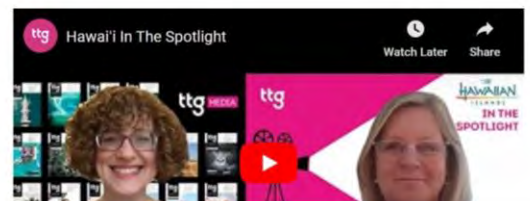
- Value of travel advisors for their expertise and financial protection.

Trade Communication & Engagement

- Foster relationships and attend trade and industry events.
- Communicate product news, events, voluntourism, and agritourism programs.

Trade Education

- Online & face-to-face training on Hawai'i's unique island brands.
- Increase **Hawai'i Destination Specialist Program** (HDSP) completions in 2025.
- Organize 2 x product manager and 2 x travel agent fam trips in 2025:
  - Incorporate multiple islands, **Mālama** and locally owned businesses.
- **'Traditional'** co-op marketing campaigns including B2B and B2C (two in 2025)



#### Hawai'i Webinarserie: Teil 3/3 am 19. April

Aloha! Im letzten und 3. Teil der Hawai'i Webinarreihe am 19. April um 11 Uhr erfahrt ihr alles über die aktuelle Situation der Insel Maui sowie deren Schwesterinseln Lāna'i und Moloka'i. Was versteht ihr unter respektvollem Reisen? In Hawai'i gibt es dafür ein Wort „Mālama“.

Meldet Euch jetzt zum Webinar an.



An underwater photograph showing a person's legs and feet on a surfboard. The water is a deep teal color, and sunlight filters through from above, creating a bokeh effect of bright, out-of-focus circles. The surfboard is dark and sleek, with the person's feet positioned on it. The overall mood is serene and dynamic.

IMPLEMENTATION

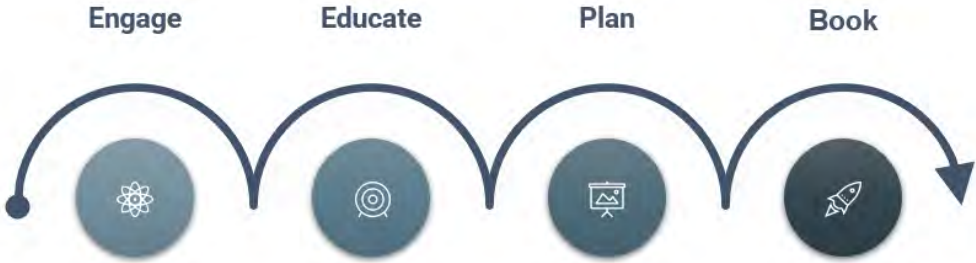
# MAJOR PROGRAMS 2025 EUROPE



## Mindful Hawai'i Integrated Campaign Jan – Dec 2025

- Mindful travelers seek inner balance and prioritize destinations that offer self-reflection and stress relief opportunities.

### Campaign Strategy



### Mindful Hawai'i Campaign Content



**VIDEO ASSETS**  
 Sunrise Serenity  
 Rainforest Retreat  
 Tranquil Tides

**AUDIO ASSETS**  
 Nature Soundscape  
 Ocean Harmony  
 Cultural Whisper

**MICROSITE**  
 User friendly, interactive and SEO optimized  
 Hosting content assets  
 Resource for planning

**APP BRAND PARTNERSHIP**  
 (e.g., Calm/Headspace)  
 Video and audio files will be made available  
 Promotion (social / EDM)

- Produce series of video and audio assets e.g., for guided meditation.
- Showcase Hawai'i as the perfect destination for mindful travelers, seeking peace, relaxation, and a deep connection with culture and nature.

# MAJOR PROGRAMS 2025 EUROPE



## Mindful **Hawai'i** Campaign Channels

- Video on Demand / Video Display / Social (Meta) / Brand Partnership Channels / Programmatic Audio / Out of Home / Dynamic Re-Targeting.



## Mindful **Hawai'i** Campaign Deliverables

## Partner Deliverables

KPI	DE	UK	CH
IMPRESSIONS	9,734,416	9,734,416	7,703,166
REACH	2,433,604	2,433,604	1,925,791
VIDEO / AUDIO VIEWS	1,605,714	1,605,714	1,180,714
VIDEO / AUDIO COMPLETES	802,857	802,857	590,357
CLICKS / INTERACTIONS WITH ASSETS	46,688	46,688	36,063
INTERACTION RATE %	1.71%	1.71%	1.64%
ARRIVALS TO MINDFUL HAWAI'I MICROSITE, GO HAWAI'I OR TOUR OPERATOR SITES	17,828	17,522	14,108

- Partners buy in through contra marketing activities.
- 2 tour operator / airline partners per country (6 in total).

# MAJOR PROGRAMS 2025 EUROPE

## Your Personal Aloha Campaign Sep – Dec 2025

- AI-powered Experience Builder using **Microsoft's Open.ai platform**

### Campaign Strategy / User Journey

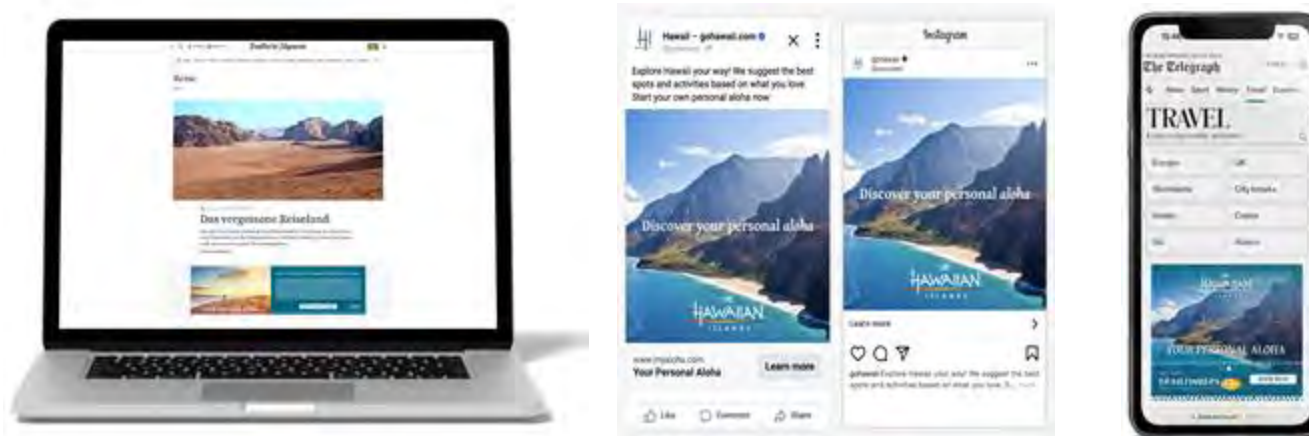
- Stage 1: Deliver the Your Personal Aloha AI Experience Builder via rich media ads to highly targeted users.
- Stage 2: Users enter their holiday preferences in the ad and press "Go."
- Stage 3: AI curates a list of Hawai'i experiences based on user preferences within the ad unit – itinerary can be shared via social or email.
- Stage 4: Users click through to the microsite to explore itineraries and deals.
- Stage 5: Engaged users are added to our data pool.
- Stage 6: Users in this data pool receive retargeting ads provided by participating tour operators.



# MAJOR PROGRAMS 2025 EUROPE

## Mindful **Hawai'i** Campaign Channels

- Interactive Display / Social (Meta) / Brand Partnership Channels / Dynamic Re-Targeting.



## Mindful **Hawai'i** Campaign Deliverables

KPI	DE	UK	CH
IMPRESSIONS	5,056,277	5,056,277	3,307,359
REACH	1,264,069	1,264,069	826,840
CLICKS / INTERACTIONS WITH ASSETS	151,688	151,688	99,221
INTERACTION RATE %	3%	3%	3%
ARRIVALS TO MINDFUL HAWAI'I MICROSITE, GO HAWAI'I OR TOUR OPERATOR SITES	9,113	9,113	5,661

## Partner Deliverables

- Partners buy in through contra marketing activities.
- 1 tour operator / airline partners per country (3 in total).



PARTNER-  
SHIP  
OPTIONS  
2025  
EUROPE

- Support 2 x Travel Agent Fam Trips (Islands TBC – Q1/Q2 + Q3/Q4).
- Support Product Manager Fam Trip (Islands TBC – Q3/Q4).
- Support 2 x Group Press Trips (UK: Kaua'i und Maui / Germany: O'ahu und Maui – Q2).
- Support 2 x Individual Press Trips (Islands TBC – Q3).
- Join trade trainings (in-person and webinars – ongoing).
- Support events in Europe (consumer/trade).
- Share your news for press releases and trade training.
- Support consumer and trade coop campaigns (Information, in-kind support and special offers for participating tour operator partners).





A woman in a purple lei is dancing in the foreground, her body angled towards the right. She is wearing a dark, flowing dress. The background is a bright sunset over a beach, with silhouettes of palm trees and a crowd of people. In the distance, there are several tall, thin structures with pointed tops, possibly part of a festival or event. The overall atmosphere is warm and celebratory.

Mahalo nui loa!

10g

**Hawai'i Tourism Korea**

# HAWAII TOURISM

KOREA



## 2025 Brand Marketing Plan

- Korea

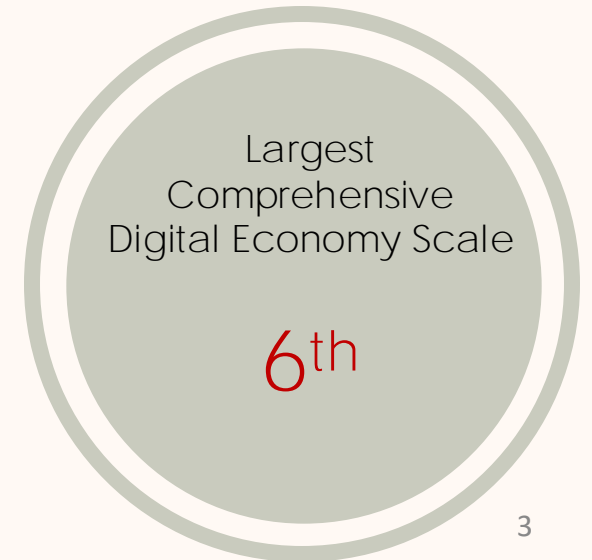
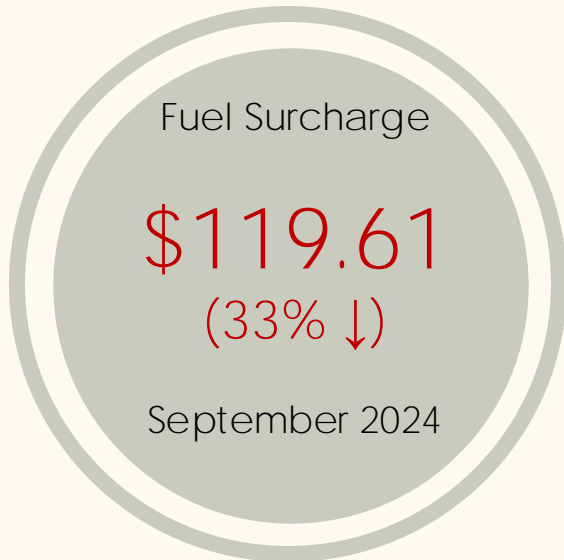
Irene Lee  
Korea Country Director

The background of the slide is a dense arrangement of various tropical leaves in shades of green, set against a dark teal background. The leaves include large, heart-shaped leaves with prominent veins, long, narrow palm fronds, and a fan-shaped leaf. The text 'MARKET SITUATION' is centered in white, uppercase letters. A white horizontal line is positioned below the text.

# MARKET SITUATION

---

# GENERAL ECONOMY



# KOREAN VISITOR STATS

## Visitor Expenditures (\$ M)

\$253.0M (2019 Jan – Jul)  
\$249.9M (2023 Jan – Jul )  
\$248.3M (2024 Jan – Jul)

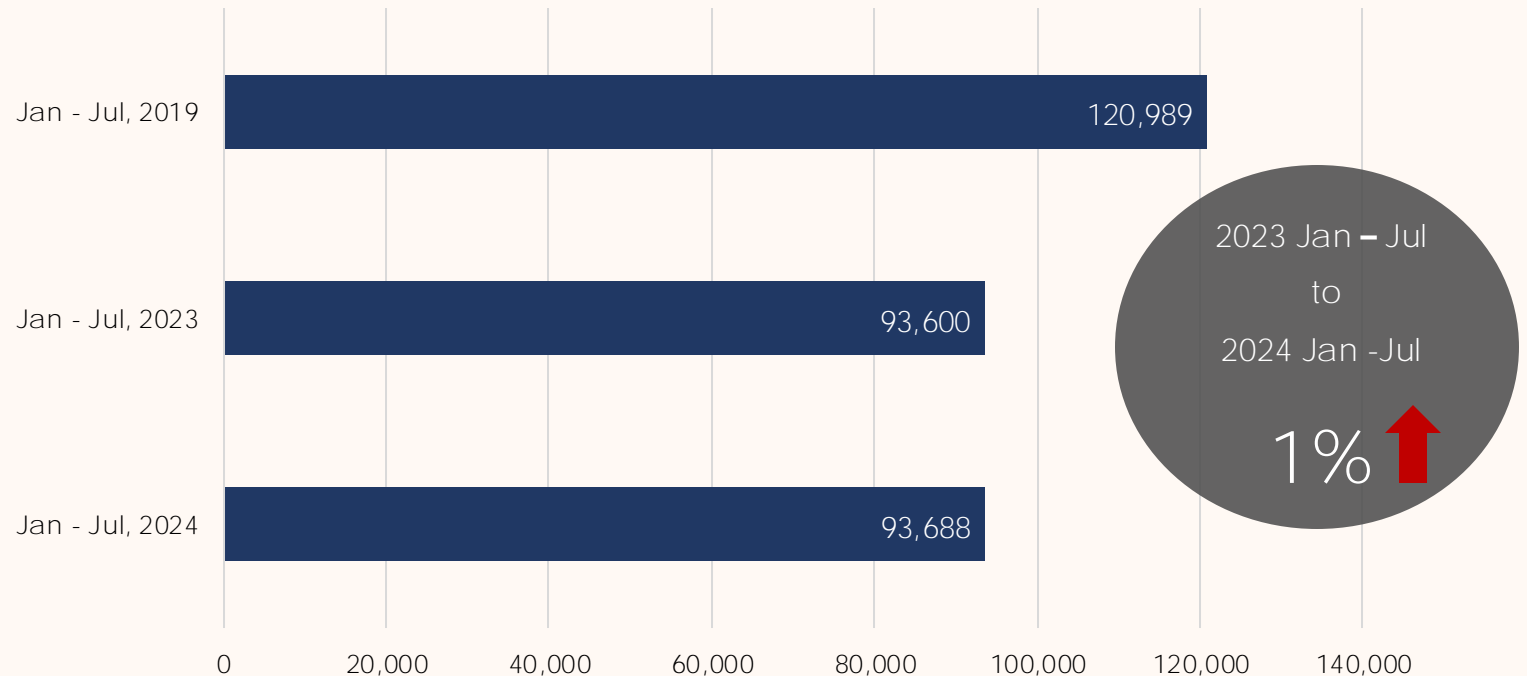
2019 to 2024  
Jan – Jul  
98.1% Recovered

## Per Person Per Day Spending (\$)

\$272.2 (2019 Jan – Jul)  
\$310.5 (2023 Jan – Jul)  
\$313.6 (2024 Jan – Jul)

2019 to 2024  
Jan – Jul  
15.2% ↑

## No. of Korean Visitors to Hawai'i



# AIRLIFT UPDATE

Korean Air & Asiana Airlines Merger Nears Completion

*U.S. approval pending*



Air Premia's Impressive Growth

*5 International routes*

*85.6% average load factor*



# AIR SEAT SYNOPSIS

## Current Flight Operations:

Airlines	Frequency	Seats (Aircraft)
 KOREAN AIR	7 weekly	291 (B777-300ER)
 ASIANA AIRLINES	5 weekly	301 (B777-200ER)
 HAWAIIAN AIRLINES	5 weekly	278 (Airbus A330)

## AIR PREMIA

Launch ICN-HNL in the first half of 2025

## Total Air Seats & Flights from Korea (Aug – Oct):

Year	Total Air Seats From Korea	Total Flights From Korea
2019 Aug - Oct	84,852	268
2023 Aug - Oct	65,392	225
2024 Aug - Oct	65,665	222
2023 vs 2024 % Increase	0.42%	- 1.3%
2019 vs 2024 % Recovery	77%	83%

\*Korean Air will operate a larger aircraft from December 2024 to March 2025, increasing the number of air seats by 11.7%.



The background of the slide is a dense arrangement of various tropical leaves in shades of green, set against a dark teal background. The leaves include large, heart-shaped leaves with prominent veins, palm fronds, and other broad-leafed plants. The text is centered over this background.

# 2025 MARKETING STRATEGY

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# STRATEGIC GOAL

Position  
**Hawai'i as a**  
Unique and  
irreplaceable  
destination

Immerse  
Travelers in  
Authentic  
**Hawai'i**  
Culture

Champion  
Regenerative  
Tourism

Cultivate  
Meaningful  
Connections

# BRANDING MESSAGE

The People.  
The Place.  
The Hawaiian  
Islands.



captures what makes this place special by sharing the stories of the Hawai'i people and encouraging visitors to experience our unique culture



Your One & Only  
**Hawai'i**

presents the Hawaiian Islands as the ultimate premium destination, offering a high-quality experience

# TARGET AUDIENCE

Mindful Korean travelers with household incomes of \$70,000+ and with double incomes of over \$120,000 are being targeted in Seoul Metropolitan Area and Busan-Gyeongnam Area.

## Mainstreamers

(30s – 60s)



- Family-oriented vacation
- Emphasis on Safety
- Interested in eco-tourism/Responsible travel

## Romantic Couples

(20s – 40s)



- Newlyweds
- Honeymooners
- Couples
- Romance

## Affluent Travelers

(40s – 70s)



- High purchasing power
- Prefer a luxury, exclusive, premium
- Prioritize comfort, quality

## FIT & SIT

(20s – 40s)



- Independent
- Passionate individuals with specific interest
- Seek unique, memorable experience

The background of the slide is a dense, dark green collage of various tropical leaves, including large monstera leaves, palm fronds, and other broad-leafed plants. The text is centered over this background.

# 2025 MAJOR CAMPAIGNS

---

# The People. The Place. The Hawaiian Islands. Campaign

- Position Hawai'i as a unique and captivating destination, emphasizing the value of its people and culture.
- The campaign aims to inspire meaningful experiences for Korean visitors through a three-pronged approach: The People. The Place. and The Hawaiian Islands.

# #1 The People

- Highlight signature Hawai'i festivals and events for Hawai'i people and Korean visitors
- Deepen understanding of Hawaiian authenticity by showcasing historical and cultural experiences



## PR/Consumer Programs:

- Launch a social media campaign to highlight Hawai'i's culture, history, and people
- Partner with media to share stories of Hawai'i's people

## Expected Outcome:

- Familiarize Korean audiences with authentic and sustainable Hawai'i travel practice
- 30 Hawai'i social content creation

## #2 The Place

- Encourage responsible tourism and mindful practices to preserve Hawai'i's natural beauty and cultural heritage
- Introduce agritourism and voluntourism programs as opportunities to connect with the Hawai'i community and environment

### Travel Trade:

- #MauiStrong promotion with trade partners
- Joint promotion with agencies supporting regenerative tourism
- Trade FAM tour with agritourism or voluntourism

### PR/Consumer:

- Create new neighbor island content for the Mālama Hawai'i 3D Showroom
- Promote regenerative tourism via HTK channels

### Expected Outcome

- Increase visitors who understand and support regenerative tourism
- Boost Neighbor Island visitation
- Attract mindful travelers and improve community satisfaction





## #3 The Hawaiian Islands

- Enhance brand recognition of the Hawaiian Islands as more than just a destination
- Showcase the unique characteristics and attractions of each Hawaiian island

### Travel Trade:

- Host the high-impact Hawai'i Travel Mission uniting Hawai'i partners with key trade leaders
- Co-op with airlines and trade partners to promote the neighbor islands
- Educate travel partners with in-depth information about Hawai'i through Hawai'i Specialist Program

### Expected Outcome

- A minimum 1.2M impressions through trade media channels
- 100+ trade education participants
- 200+ trade partners participation and over 12+ meetings in HTM



A photograph of a couple relaxing on lounge chairs by a swimming pool. The man is on the left, wearing a yellow bikini bottom and sunglasses, looking towards the woman. The woman is on the right, wearing a white lace top and a large straw hat, holding the man's hand. The background shows a pool, palm trees, and a building under a blue sky with clouds.

# Your One & Only Hawai'i Campaign

- Position the Hawaiian Islands as the ultimate premium and romantic travel destination
- Enhance visitor satisfaction by offering exceptional experiences
- Encourage extended stays and increased spending in Hawai'i

# #1 For Affluent Travelers

### Travel Trade:

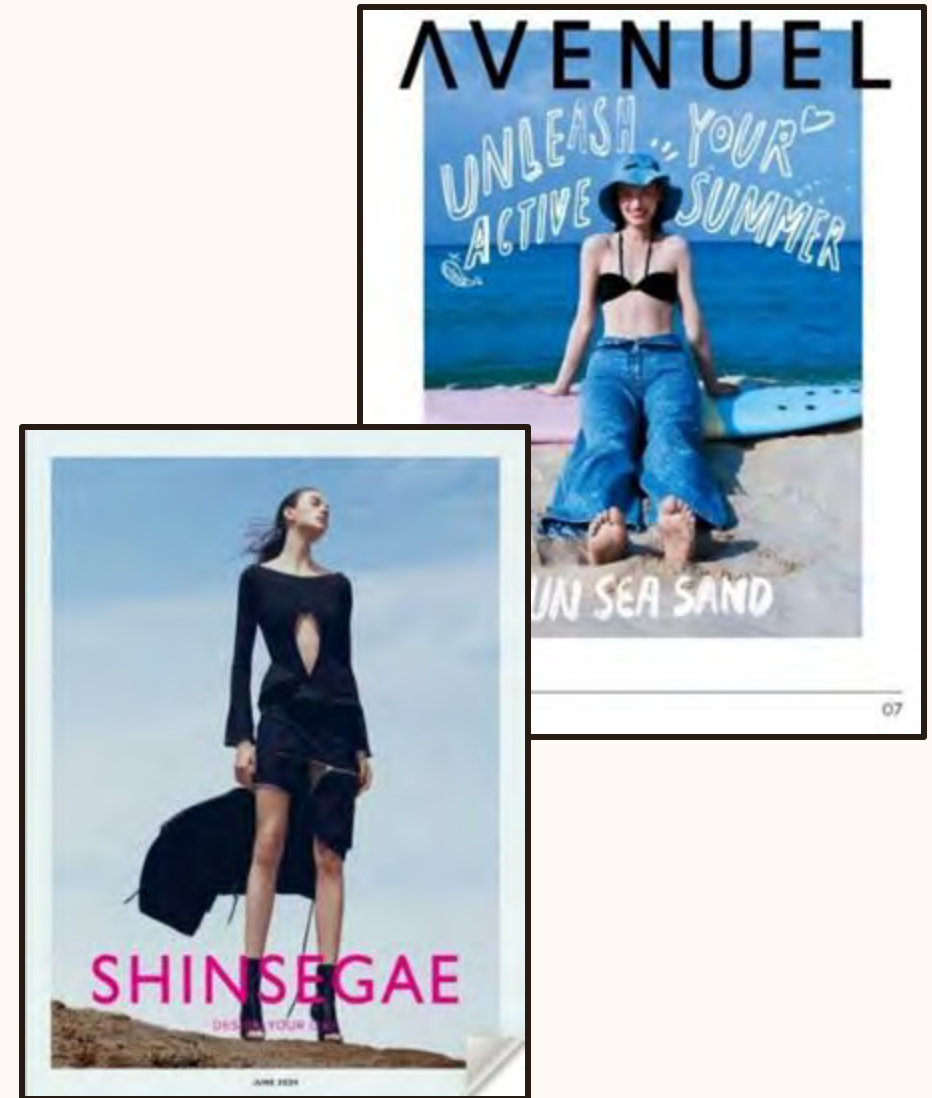
- Promote premium long-stay packages
- Partner with credit card companies to boost traveler spending
- Promote the Lotte LPGA Championships with key travel agents

### PR/Consumer:

- Collaborate with department stores to feature attractions in their magazines
- Create travel content on Neighbor Islands with top celebrities, influencers, or media

### Expected Outcome

- Develop new high-quality packages for Hawai'i
- Enhance satisfaction by offering premium travel products
- Increase visitor spending and extend the average stay in Hawai'i



## #2 For Romantic Couples

### Travel Trade:

- Support honeymoon exhibitions to position Hawai'i as a premier honeymoon destination.
- Conduct FAM trip to showcase undiscovered and unique romantic

### PR/Consumer:

- Pitch the new romantic tourism attractions and activities to media
- Develop and share engaging social media content highlighting Hawai'i's romantic attractions and experience

### Expected Outcome

- Develop 3 new Hawai'i honeymoon products
- A minimum of 600K impressions
- Enhance brand perception of Hawai'i as the ultimate romantic destination



# Signature Hawai'i Campaign

- Offer diverse-themed travel experiences tailored to specific interests in Hawai'i
- Provide comprehensive information on activities like hiking, marathons, culinary tours, surfing, and shopping to inspire Korean travelers

## Signature Hawai'i Campaign

### Travel Trade:

- Partner with travel agencies to develop and promote signature-themed packages, such as tours for runners at the Honolulu Marathon Festival

### PR/Consumer:

- Create a B2BC Signature Travel Magazine focused on adventure, wellness, family travel, and eco-tourism
- Conduct a thematic FAM trip with Key Opinion Leaders (KOLs)
- Collaborate with a leading consumer brand to showcase themed travel content for Hawai'i

### Expected Outcome

- Distribute the Signature Travel Magazine quarterly
- Promote diverse Hawai'i travel themes through online and offline channels





MAHALO!  
Kamsa-hap-nida!

10h

**Hawai'i Tourism China**





2025

# BRAND MARKETING PLAN

## CHINA

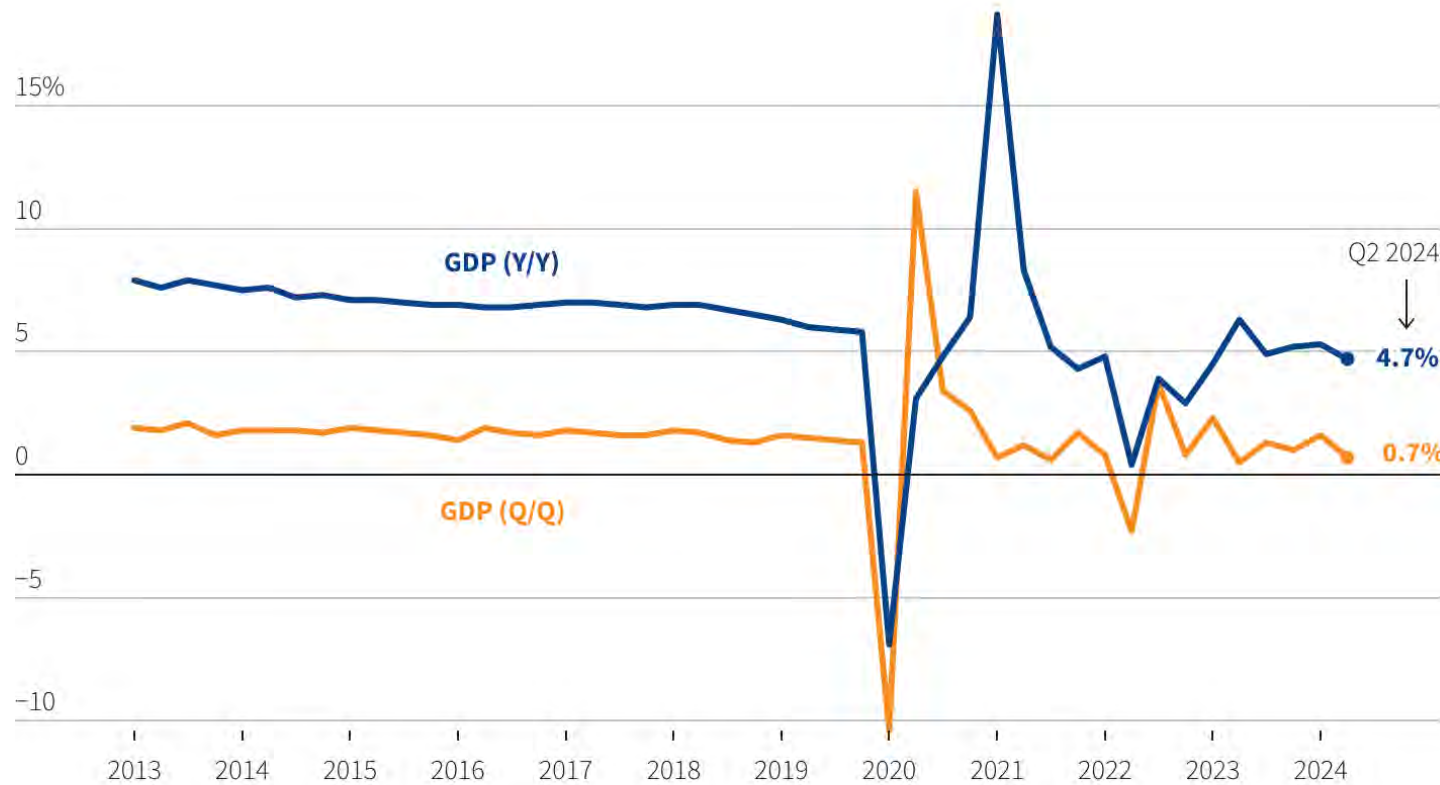
Dennis Suo  
Managing Director

**HAWAII TOURISM**  
CHINA

# GENERAL ECONOMY

## China's Q2 GDP grows slower than expected

China's economy expanded 4.7% in the second quarter from a year earlier, missing analysts' expectations of 5.1%, even as policymakers seek to boost domestic demand amid a protracted property downturn.



Source: LSEG Workspace | Reuters, July 15, 2024 | By Kripa Jayaram

CNY vs. USD

7.26 vs. 7.09 LY, -2.9% (Aug 2024)

GDP

+4.5% in 2023, +4.7% in 2024 (FC)

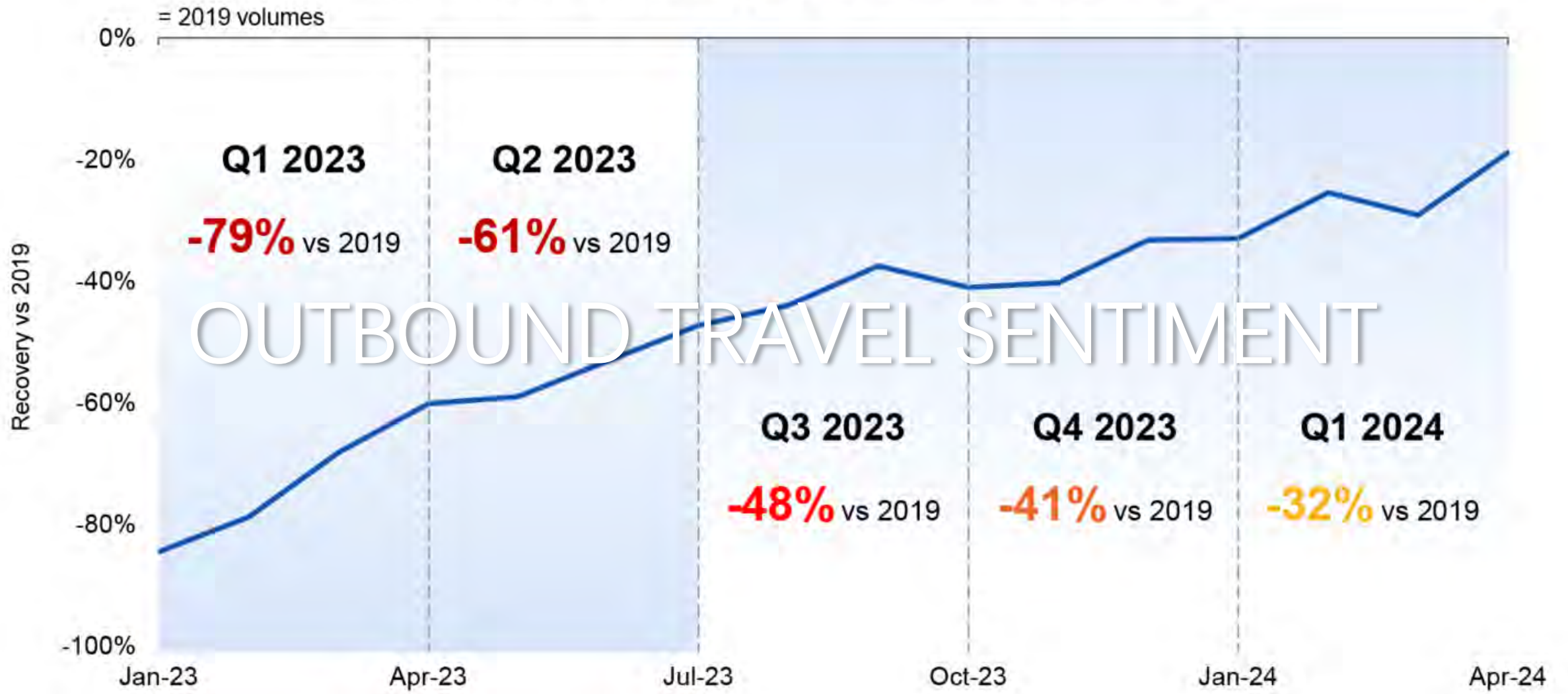
Urban Unemployment Rate

5.2% (2023) vs. 5.2% (2024 July)

Annual Inflation Rate

0.2% (2023) vs. 0.3% (2024 May)






# International departures from China in 2023 and Q1 2024, with tickets as of 3 April; % difference vs 2019



Source: ForwardKeys Air Ticket Data

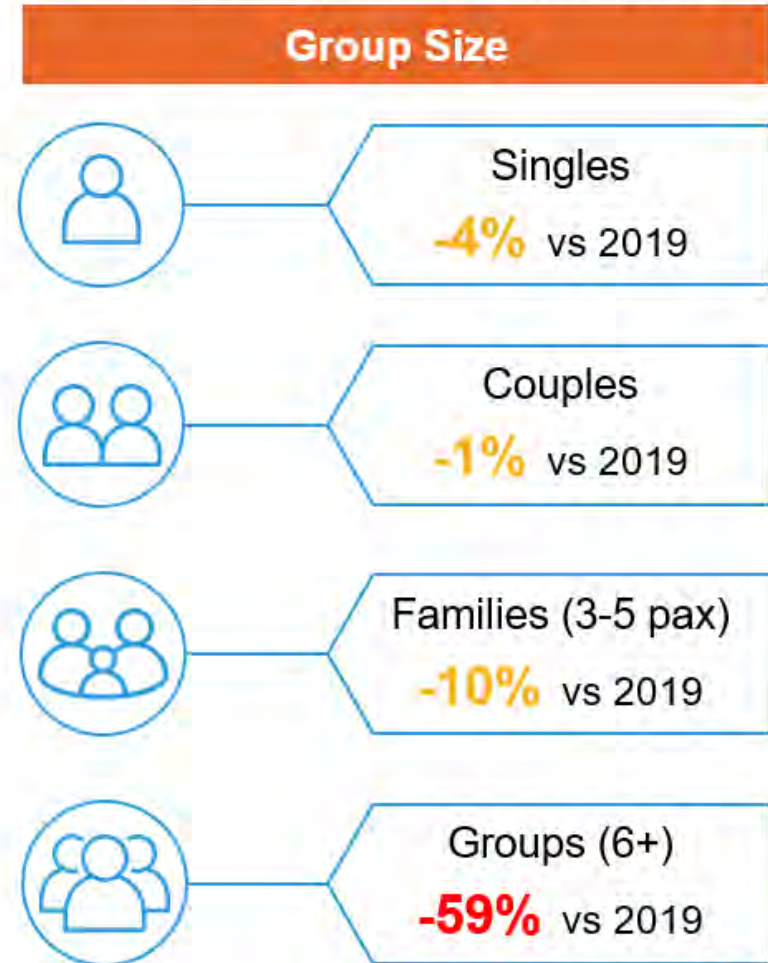
© ForwardKeys, 2024. All Rights Reserved.

# Best performing destinations outside Asia for Chinese travellers with tickets as of 3 April; % difference vs 2019

Best performing destinations* outside Asia	Labor Holiday vs 2019
 United Arab Emirates	<b>+66%</b>
 Turkiye	<b>+56%</b>
 Italy	<b>+19%</b>
 Australia	<b>+12%</b>
 United Kingdom	<b>+12%</b>
<b>TOTAL OUTSIDE ASIA</b>	<b>-15%</b>

\*Considering destinations with share >2%

## Labor Holiday arrivals outside Asia



# COMPETITIVE LANDSCAPE



China outbound visits 130m in 2024 vs. 87m in LY



US to receive 1.7m Chinese visitors in 2024 vs. 850K in LY



Forecast Europe recovery to 13m by 2026 as 2019 level



Thailand, Singapore Visa waiver program



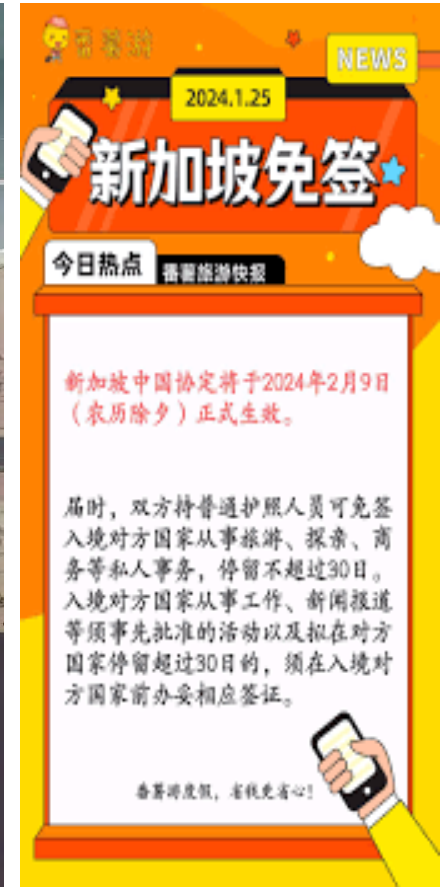
Saudi Tourism Authority \$500B investment to attract visitors



All 8 Chinese airlines that flew through Sydney have returned, 86% recovered



5 major cities restored flights to Maldives in 2024



# AIR SEAT SYNOPSIS

3/31/24: 100 flights weekly

U.S. 5 Chinese & 3 US carriers (reciprocity)

Ideal connecting flight from (Japan) Narita, Haneda, (Korea) Incheon, same day transit

> 350 weekly flights from Japan/Korea to China

> 20 cities to connect, (Beijing, Shanghai, Shenzhen, Qingdao, Tianjin, Guangzhou, Hangzhou, Xi'an, Dalian, etc.)

Average economy ticket price round trip \$1,500, business class \$4,000

Spring Airlines + JAL code share from 5 cities to HNL



ASIANA AIRLINES



SPRING JAPAN  
春秋航空日本



# TARGET AUDIENCE

MILLENNIUM  
INDIVIDUALIST (MI)

FAMILY

HIGH NET WORTH  
INDIVIDUAL  
(HNWI)

**夏威夷超酷超美跳伞攻略**  
旅行必体验的项目 夏威夷跳伞攻略来啦  
👉👉👉👉👉👉👉👉👉👉  
如果小伙伴们去夏威夷玩耍，那一定要去跳一次伞，不仅是因为夏威夷海岛的风景真的太美，也是因为夏威夷跳伞是全球！最！低！价！敲黑板，真的比其他任何一个地方都要便宜，真的不要太划算！👉👉  
被马克·吐温称为“大洋中最美的岛屿”的夏威夷，是旅游的天堂。夏威夷跳伞被称为世界最美的跳伞之一，特别是夏威夷欧胡岛的Drop Zone更是被誉为World most beautiful DZ（世界上最美的空天地）。  
夏威夷跳伞目前只能在欧胡岛，（也就是夏威夷的首府，火奴鲁鲁）欧胡岛的跳伞公司目前有两家，分别为SKYDIVE HAWAII和PACIFIC SKYDIVING，其中只有Pacific skydiving有21000英尺的高空跳伞，这是不带氧气可以允许的最高跳伞高度。

**酒店私人沙滩**  
THE ROYAL HAWAIIAN GUESTS ONLY  
少女心泛滥的夏威夷粉色酒店推荐 皇家夏威夷酒店 “The pink palace of the Pacific”  
这家酒店真的到处都是粉红色，很多ins博主都来打卡过。普通房型都是园景，粉色背景墙，房间设施有些老旧，毕竟是有90多年历史的酒店了。强烈推荐塔楼套房，阳台景色真的太美了。携程价格3500左右，酒店每天还有30美金左右的resort fee。

**夏威夷 say "Yes, I do" in Hawaii**  
很多情侣选择来夏威夷蜜月，抽出一两天的时间拍摄婚纱照。  
图中的YES-IDO车牌是夏威夷注册有效的汽车牌照哦！

孩子们睡了，来聊聊地二夏威夷亲子游吧！  
去年感恩节在夏威夷过的，老大就念着想回来夏威夷，索性就决定圣诞节来夏威夷过了，我一个人带两个，老大女儿6岁，老二儿子22个月，可想有多难搞了吗.....  
因为是带孩子出来旅游，所以主题主要以孩子为准，我们在8天在夏威夷，我定了4天在迪士尼主题酒店、后四天在

**购物** 爱马仕菜篮子18奶昔白金扣！降价的扎克难宝  
夏威夷逛什么  
Honolulu有两个大型购物地，Waikiki和Aloha Moana  
我住在Waikiki的Royal Hawaiian真的是宇宙中心！楼下就是Royal Hawaiian center，各种名牌店！

**欧胡岛保姆级攻略** 第一次去夏威夷怎么玩  
欧胡岛是夏威夷所有岛屿中最繁华最有青春气息的一个，首府火奴鲁鲁也是从中国来夏威夷的必到之地，第一次来夏威夷的盆友一定要收好这篇。  
玩  
威基基海滩

1.Desirability  
for Island  
Destination

2.Accessibility  
BJ/SH/CD

3.Disposable  
Income

4.US Visa  
Issuance

# CORE MASSAGING

The People, The Place, The Hawaiian Islands #拥抱一切想象# Embrace all imagination

× 夏威夷州旅游观光局 > ... × 夏威夷州旅游观光局 > ...



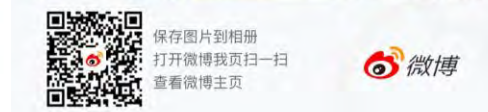
× 夏威夷州旅游观光局 > ...



< Back 夏威夷旅游局



夏威夷最具活力和都市感的欧胡岛，是寻找多元美食的绝佳场所。在任何一家餐厅的菜单上，你一定会看到关于本地农场食材的注释。餐厅老板会热情地为你介绍从农场到餐桌的本地健康食材。... Full Text



对于一次旅行，购物是旅途中不可缺少的一部分，特别是选购独具当地特色的纪念品。其实，有很多夏威夷的本地特产大家都已经耳熟能详，例如，夏威夷果、科纳咖啡、大岛的蜂蜜……。而今天这篇文章，或许可以帮你打开一个买买买的新思路。





# CONSUMER SOCIAL MEDIA MARKETING



# CONSUMER SOCIAL MEDIA MARKETING

## Content creation

"Things to Do"  
by individual  
island

Unique  
Experiences

Mālama  
Hawai'i

Stakeholders'  
Content

Partnership  
with Influencer



Consistent messages across platforms



Collaboration with industry partners to leverage  
viewership

(Airlines, OTAs, US Embassy, etc.)



**MOST USED  
OTAS  
IN CHINA**



# TRADE

## TRAVEL TRADE EDUCATION

Travel trade education session to major OTAs and wholesalers

Offer FAM trip to experience Hawaiian Islands

Collaborate with airline and OTAs for bundled travel package and joint social marketing

Partner with key OTAs, US Embassy, Education USA on joint marketing campaigns and road shows

U.S. COMMERCIAL SERVICE  
United States of America  
Department of Commerce

THE HAWAIIAN ISLANDS

美国驻华使馆  
商务处

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2024美国的精彩之选 ——  
最『美』夏威夷 旅游推广活动

2024年5月31日 (周五)  
13:45 - 17:30 (13:15签到)

美国使馆东门 北京美国文化中心  
朝阳区安家楼路55号

请于13:10抵达通过安检, 请勿携带笔记本电脑

请扫码查看议程  
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O'AHU One of the HAWAIIAN ISLANDS

THE ISLAND of HAWAII One of the HAWAIIAN ISLANDS

Blue Hawaiian HELICOPTERS

KUALOA RANCH PRIVATE NATURAL RESERVE

波利尼西亚文化中心 POLYNESIAN CULTURAL CENTER One Place Like No Other

Hawaii Island Holiday 檀岛之旅

Waialeale International Tours 威亚利埃国际旅行社

Disney Vacation Club 迪士尼度假区



# TRADE MISSION



第十二屆澳門國際旅遊（產業）博覽會  
12.<sup>a</sup> Expo Internacional de Turismo (Indústria) de Macau  
12<sup>th</sup> Macao International Travel (Industry) Expo



澳門特別行政區  
二十五周年紀念  
Celebration of  
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of the Macao Special  
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MACAO GOVERNMENT TOURISM OFFICE



Partnership with 13<sup>th</sup>  
Macao Intl' Tourism  
Expo – (MITE)



April 25<sup>th</sup> –  
27<sup>th</sup> 2025



Industry partners, OTAs,  
Airlines, Wholesalers, Travel  
Media, and Travel KOLs



668 Exhibitors, 54 Countries and  
Regions, 1036 Buyers and Trade  
Visitors (12th MITE)



# PARTNERSHIP OPPORTUNITIES

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MITE + Travel Mission (Apr 25)

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US Embassy & Consulates/Brand USA Roadshows (quarterly)

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Trade Bundled Package (ongoing)

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**RED's Influencer FAM Trip (Oct 25)**

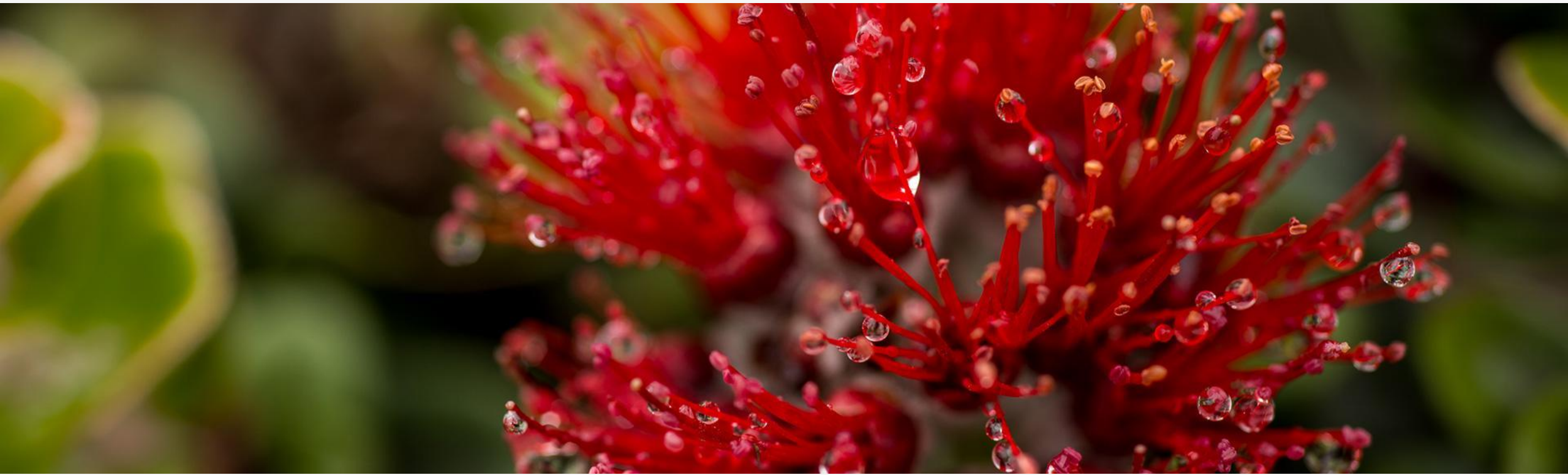
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Media FAM Trip (Nov 25)

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Social Media Content Collaboration (ongoing)





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Mahalo 谢谢!

11

**Discussion and Action on  
HTA's Financial Reports for July and August 2024**



**The State of Hawai`i**  
**Department of Business, Economic Development, and Tourism**  
**Hawai`i Tourism Authority**  
**Financial Statements**  
**July 31, 2024**

These financial statements have been prepared by HTA management (unless otherwise noted) for information purposes only. See notes to the financial statements.

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Prepared by: Talon Kishi, CPA

HTA Budget and Fiscal Officer

HAWAII TOURISM AUTHORITY



Hawaii Tourism Authority  
July 31, 2024  
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**Hawaii Tourism Authority**  
**Balance Sheet**  
**As of July 31, 2024**

	<b>Tourism Funds</b>	<b>Convention Center Funds</b>	<b>Roof Repair Project and Roof Related Repairs</b>	<b>EDA-ARPA State Tourism Grant</b>	<b>Tourism Emergency Special Fund</b>	<b>Total</b>
<b>Assets</b>						
General Funds	64,238,452	2,078,262	-	-	-	66,316,714
Special Funds (restricted)	8,408,120	47,754,689	-	-	-	56,162,809
Federal Grants	-	-	-	9,056,717	-	9,056,717
General Obligation Bonds (GOB)	-	-	14,572,388	-	-	14,572,388
Cash and Cash Equivalents	-	-	-	-	772,159	772,159
<b>Total Assets</b>	<b>72,646,572</b>	<b>49,832,951</b>	<b>14,572,388</b>	<b>9,056,717</b>	<b>772,159</b>	<b>146,880,787</b>
<b>Liabilities and Fund Balances</b>						
<b>Fund Balances</b>						
Encumbered - General Funds	6,899,072	2,078,262	-	-	-	8,977,334
Unencumbered - General Funds	57,339,380	(0)	-	-	-	57,339,380
<b>Total General Fund Balances</b>	<b>64,238,452</b>	<b>2,078,262</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>66,316,714</b>
Encumbered - Special Funds	935,042	501,432	-	6,000,345	410,568	7,847,386
Unencumbered - Special Funds	7,473,078	47,253,257	-	3,056,372	361,591	58,144,299
<b>Total Special Fund Balances</b>	<b>8,408,120</b>	<b>47,754,689</b>	<b>-</b>	<b>9,056,717</b>	<b>772,159</b>	<b>65,991,685</b>
Encumbered - GOB	-	-	14,572,388	-	-	14,572,388
Unencumbered - GOB	-	-	-	-	-	-
<b>Total GOB Fund Balance</b>	<b>-</b>	<b>-</b>	<b>14,572,388</b>	<b>-</b>	<b>-</b>	<b>14,572,388</b>
<b>Total Fund Balances</b>	<b>72,646,572</b>	<b>49,832,951</b>	<b>14,572,388</b>	<b>9,056,717</b>	<b>772,159</b>	<b>146,880,787</b>
<b>Total Liabilities and Fund Balances</b>	<b>72,646,572</b>	<b>49,832,951</b>	<b>14,572,388</b>	<b>9,056,717</b>	<b>772,159</b>	<b>146,880,787</b>

\* Refer to notes of the financial statements for more information.

**Hawaii Tourism Authority**  
**Fiscal Year 2025 - Tourism General Fund**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Budget vs. Actual**  
**For the Month Ended, YTD, and Fund Balance as of July 31, 2024**

	Actual			Budget vs.
	Month Ended July 31, 2024	YTD	Encumbrances Remaining	Actual
			FY 25 Budget	Under (Over) Budget
<b>Revenues</b>				
Refunds	-	-	-	-
	-	-	-	-
<b>Expenditures</b>				
Administration and Governance	369,666	369,666	-	3,326,994
Branding and Marketing	3,924,920	3,924,920	-	35,324,281
Destination Stewardship and Community	792,388	792,388	-	7,131,495
Regenerative Tourism Development	376,218	376,218	-	3,385,963
Sports and Signature Events	731,808	731,808	-	6,586,267
Workforce Development	105,000	105,000	-	945,000
Total	6,300,000	6,300,000	-	56,700,000
Change in Fund Balance	(6,300,000)	(6,300,000)		
<b>Fund Balances</b>				
July 1, 2024 / July 1, 2024	63,000,000	63,000,000		
July 31, 2024	56,700,000	56,700,000		

\* Refer to notes of the financial statements for more information.

**Hawaii Tourism Authority**  
**Fiscal Year 2024 - Tourism General Fund**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Budget vs. Actual**  
**For the Month Ended, 13-Month Period Ended, and Fund Balance as of July 31, 2024**

	Actual			Budget vs. Actual	
	Month Ended July 31, 2024	July 1, 2023 to July 31, 2024	Encumbrances Remaining	FY 24 Budget	Under (Over) Budget
<b>Revenues</b>					
Refunds	-	-	-	-	-
	-	-	-	-	-
<b>Expenditures</b>					
Administration	-	327,170	10,000	337,170	(0)
Branding	1,800,000	31,810,416	1,043,320	33,081,417	227,681
Destination Management	-	8,358,902	5,233,836	13,592,738	(0)
Governance and Org-Wide*	-	346,599	147,200	514,893	21,094
HCC Marketing	-	3,962,000	-	3,962,000	-
Perpetuating Hawaiian Culture	-	1,091,803	204,583	1,317,765	21,379
Planning & Evaluation	-	663,410	141,897	805,308	0
Resident and Industry Comms	-	506,804	94,236	604,729	3,689
Safety & Security	-	520,000	-	520,000	-
Salaries	-	2,134,464	-	2,500,000	365,536
Sports	-	2,613,500	-	2,613,500	-
Workforce Development	-	126,480	24,000	150,480	-
Total	1,800,000	52,461,548	6,899,072	60,000,000	639,380
Change in Fund Balance	(1,800,000)	(52,461,548)			
<b>Fund Balances</b>					
July 1, 2024 / July 1, 2023	9,338,452	60,000,000			
July 31, 2024	7,538,452	7,538,452			

\* Refer to notes of the financial statements for more information.

**Hawaii Tourism Authority**  
**FY 2024 - Convention Center General Fund**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Budget vs. Actual**  
**For the Month Ended, 13-Month Period Ended, and Fund Balance as of July 31, 2024**

	Actual			Budget vs.	
	Month Ended July 31, 2024	July 1, 2023 to July 31, 2024	Encumbrances Remaining	FY 24 Budget	Under (Over) Budget
<b>Revenues</b>					
Refunds	-	-	-		
	-	-	-	-	-
<b>Expenditures</b>					
HCC Marketing	-	1,223,700	-	1,223,700	-
HCC Operations	-	3,952,440	2,078,262	6,030,702	(0)
HCC Repairs and Maintenance	-	3,745,598	-	3,745,598	-
Total	-	8,921,738	2,078,262	11,000,000	(0)
Change in Fund Balance	-	(8,921,738)			
<b>Fund Balances</b>					
July 1, 2024 / July 1, 2023	2,078,262	11,000,000			
July 31, 2024	2,078,262	2,078,262			

\* Refer to notes of the financial statements for more information.

**Hawaii Tourism Authority**  
**Roof Repair Project and Roof Related Repairs**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Budget vs. Actual**  
**For the Month Ended, 13-Month Period Ended, and Fund Balance as of July 31, 2024**

	Actual			Budget	Budget vs.
	Month Ended July 31, 2024	July 1, 2023 to July 31, 2024	Encumbrances Remaining		Actual
					Under (Over) Budget
<b>Revenues</b>					
Refunds	-	-	-		
	-	-	-	-	-
<b>Expenditures</b>					
HCC Full Roof Repair	-	298,712	888,288	1,187,000	-
HCC Roof Related Projects	-	-	13,684,100	13,684,100	-
Total	-	298,712	14,572,388	14,871,100	-
Change in Fund Balance	-	(298,712)			
<b>Fund Balances</b>					
July 1, 2024 / July 1, 2023	14,572,388	14,871,100			
July 31, 2024	14,572,388	14,572,388			

\* Refer to notes of the financial statements for more information.

**Hawaii Tourism Authority**  
**EDA-ARPA State Tourism Grant**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Budget vs. Actual**  
**For the Month Ended, 13-Month Period Ended, and Fund Balance as of July 31, 2024**

	Actual			Budget vs. Actual	
	Month Ended July 31, 2024	July 1, 2023 to July 31, 2024	Encumbrances Remaining	Grant Budget	Under (Over) Budget
<b>Revenues</b>					
Refunds	-	-	-		
	-	-	-	-	-
<b>Expenditures</b>					
Administration	-	-	-	254,907	254,907
Branding	2,500,000	4,000,000	-	4,000,000	-
Destination Management	-	967,655	6,000,345	7,950,000	982,000
Planning & Evaluation	-	-	-	750,000	750,000
Salaries and Fringe	-	-	-	1,069,465	1,069,465
Total	2,500,000	4,967,655	6,000,345	14,024,372	3,056,372
Change in Fund Balance	(2,500,000)	(4,967,655)			
<b>Fund Balances</b>					
July 1, 2024 / July 1, 2023	11,556,717	14,024,372			
July 31, 2024	9,056,717	9,056,717			

\* Refer to notes of the financial statements for more information.

**Hawaii Tourism Authority**  
**Tourism Emergency Special Fund**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Budget vs. Actual**  
**For the Month Ended, 13-Month Period Ended, and Fund Balance as of July 31, 2024**

	Actual			Budget vs.
	Month Ended July 31, 2024	July 1, 2023 to July 31, 2024	Encumbrances Remaining	Under (Over) Budget
<b>Revenues</b>				
Change in Fair Value	-	53,273	-	-
Interest, Net	-	72,658	-	-
Total	-	125,931	-	-
<b>Expenditures</b>				
Administration	-	83	-	-
Branding	-	3,950,000	-	-
Destination Management	-	-	300,000	-
Planning & Evaluation	-	-	25,000	125,000
Resident and Industry Comms	-	263,739	85,568	(0)
Safety and Security	-	250,693	-	0
Total	-	4,464,515	410,568	5,000,000
Change in Fund Balance	-	(4,338,584)		124,917
<b>Fund Balances</b>				
July 1, 2024 / July 1, 2023	772,159	5,110,743		
July 31, 2024	772,159	772,159		

\* Refer to notes of the financial statements for more information.



**Hawaii Tourism Authority**  
**Tourism Special Fund**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Budget vs. Actual**  
**For the Month Ended, YTD, and Fund Balance as of July 31, 2024**

	Month Ended July 31, 2024	Actual		Budget	Budget vs.
		YTD	Prior Year Encumbrances Remaining		Actual
					Under (Over) Budget
<b>Revenues</b>					
Refunds	-	-	-	-	-
Total	-	-	-	-	-
<b>Expenditures</b>					
Administration	-	-	52,203	52,203	-
Branding	-	-	544,237	544,237	-
Destination Management	-	-	230,000	230,000	-
Resident and Industry Comms	-	-	22,602	22,602	-
Workforce Development	-	-	86,000	86,000	-
Total	-	-	935,042	935,042	-
Change in Fund Balance	-	-			
<b>Fund Balances</b>					
July 1, 2024 / July 1, 2024	8,408,120	8,408,120			
July 31, 2024	8,408,120	8,408,120			

\* Refer to notes of the financial statements for more information.

**Hawaii Tourism Authority**  
**Convention Center Enterprise Special Fund**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Budget vs. Actual**  
**For the Month Ended, YTD, and Fund Balance as of July 31, 2024**

	Actual			Budget vs. Actual		
	Month Ended July 31, 2024	YTD	Current Year Encumbrances Remaining	Budget	Under (Over) Budget	Prior Year Encumbrances Remaining
<b>Revenues</b>						
Change in Fair Value	-	-	-	-	-	-
HCC Operations	-	-	-	-	-	-
Interest	-	-	-	-	-	-
Other*	-	-	-	-	-	-
Refunds	-	-	-	-	-	-
TAT	-	-	-	11,000,000	11,000,000	11,000,000
Total	-	-	-	11,000,000	11,000,000	11,000,000
<b>Expenditures</b>						
HCC Marketing	-	-	-	1,272,648	1,272,648	-
HCC Operations	-	-	-	6,745,696	6,745,696.00	501,432
HCC Repairs and Maintenance	-	-	-	25,981,656	25,981,656	-
Total	-	-	-	34,000,000	34,000,000	501,432
Change in Fund Balance	-	-				
<b>Fund Balances</b>						
July 1, 2024 / July 1, 2024	47,754,689	47,754,689				
July 31, 2024	47,754,689	47,754,689				

\* Refer to notes of the financial statements for more information.

Hawaii Tourism Authority  
July 31, 2024  
Selected Management Disclosures

**1. Summary of Significant Accounting Policies**

The Hawaii Tourism Authority (HTA or Authority) was established on January 1, 1999, by Act 156, Session Laws of Hawaii 1998. It was placed within the State of Hawaii, Department of Business, Economic Development, and Tourism, for administrative purposes only. The Authority is responsible for developing a strategic tourism marketing plan and developing measures of effectiveness to assess the overall benefits and effectiveness of the marketing plan and progress toward achieving the Authority's strategic plan goals. In addition, effective July 1, 2000, control and management of the Hawaii Convention Center (HCC) were transferred to the Authority from the Convention Center Authority (CCA) by Executive Order No. 3817. Effective July 1, 2002, the Center, by statute, became the responsibility of the Authority. The Center opened to the public in June 1998 and is used for various events, including conventions and trade shows, public shows, and spectator events. The Center offers approximately 350,000 square feet of rentable space, including 51 meeting rooms.

The Authority is governed by a board of directors comprising 12 voting members, including those recommended by the State Legislature. The Governor of the State appoints the 12 voting members.

**Funds**

The Authority's funds are as follows:

**Tourism Funds:**

- **Tourism Special Fund (TSF)** –The TSF accounted for functions related to developing and promoting the tourism industry. Effective January 1, 2022, pursuant to Act 1 Special Legislative Session 2021, the TSF was sunset and discontinued the ability to expend any new funds. Funds encumbered as of June 30, 2021, can be spent until June 30, 2026.
- **Fiscal Year 2024 General Funds** – The 2023 State legislature did not provide HTA with an operating budget for fiscal year 2024. As such, the Governor approved the transfer of \$60,000,000 in general funds from Section 5 of Act 164, SLH 2023, to HTA on July 1, 2023. Funds lapsed on June 30, 2024.
- **Fiscal Year 2025 General Funds** – The 2024 Legislature appropriated \$63,000,000 of general funds for HTA's operating budget in Section 3 of Act 230, SLH 2024. The law allocated the \$63,000,000 budget between six program IDs based on each program's objectives. The six program IDs are Administration and Governance, Branding and Marketing, Destination Stewardship and Community, Regenerative Tourism Development, Sports and Signature Events, and Workforce Development. The law provided the funding via General Funds. As such, Budget and Finance's 10% restriction on all General Fund Appropriations applies. The HTA staff and board have discussed the matter and have informed all major vendors to adjust plans and budgets accordingly. Funds will lapse on June 30, 2025.

**Convention Center Funds:**

- **Convention Center Enterprise Special Fund (CCESF)** – Under Section 201B-8, the Convention Center Enterprise Special Fund accounts for functions related to the operation and management of the Hawaii Convention Center (HCC). The 2024 Legislature provided the CCESF with a \$34,000,000 expenditure ceiling in Section 3 of Act 230, SLH 2024. The expenditure ceiling will lapse on June 30, 2025.
- **Fiscal Year 2024 General Funds (operations)** – The 2023 State legislature did not provide the HCC with an operating budget for fiscal year 2024. As such, the Governor approved the transfer

Hawaii Tourism Authority  
July 31, 2024  
Selected Management Disclosures

of \$11,000,000 in general funds from Section 5 of Act 164, SLH 2023, for the HCC on July 1, 2023. Funds lapsed on June 30, 2024. Funds encumbered as of June 30, 2024, can be spent until June 30, 2029.

- **General Funds (CIP)** - Pursuant to Act 164, SLH 2023, \$64,000,000 of general funds were provided for long-term repairs of the HCC rooftop terrace deck. Per Executive Memorandum 23-08, dated October 30, 2023, the Department of Budget and Finance (B&F) transferred HTA's \$64,000,000 operating appropriation to B&F for the Maui wildfires.
- **General Obligation Bonds** – Under Act 248, SLH 2022, \$15,000,000 of general obligation bond funds were provided for the temporary repairs of the HCC roof repair and other items. The Governor authorized the release of funds on February 22, 2023. Unused funds will lapse on June 30, 2024.

The 2024 Legislature appropriated \$64,000,000 of General Obligation Bonds for the HCC Roof Repair Project in Section 3 of Act 230, SLH 2024. Funds will lapse on June 30, 2027.

**Tourism Emergency Special Fund:**

- The Tourism Emergency Special Fund accounts for functions related to maintaining a tourism emergency fund. Per Section 201B-10, revenues prescribed by Section 237D-6.5(b) and all investment earnings are credited to the fund's assets. Funds are currently held at the Bank of Hawaii. Funds must be exclusively used to respond to a tourism emergency per Section 201B-9.

On August 19, 2023, the governor declared a tourism emergency in the sixth emergency proclamation relating to the Maui wildfires. The Governor extended the tourism emergency in the sixteenth emergency proclamation dated July 19, 2024.

**Federal Funds:**

- **American Rescue Plan Act (ARPA)** – Official Name: Coronavirus State Fiscal Recovery Fund (CSFRF) Subaward. The former Governor authorized \$106,000,000 of ARPA funds to support HTA's and HCC's fiscal years 2022 and 2023 operations. HTA and HCC received \$95,000,000 and \$11,000,000, respectively. In total, for the two years ending June 30, 2023, \$59,155,512 and \$10,011,197 were spent on HTA and HCC operations, respectively. The Authority returned \$36,833,291 to the Department of Budget and Finance (B&F) on July 31, 2023.
- **Economic Development Administration (EDA) Tourism Grant** – Official Name: ARPA-EDA Tourism Grant (Non-Competitive ARPA State Tourism Grant for the State of Hawaii) – The Authority was awarded \$14,024,372 on December 8, 2021. Grant rules required the approval of the Grant Administration Plan (GAP) before the commencement of work. EDA approved the Authority's GAP on March 21, 2023. The Authority will share approximately \$7,200,000 of the grant with the Department of Land and Natural Resources (DLNR) to enhance and develop Hawaii's outdoor recreational assets. All work must be completed by May 31, 2027, and money spent by September 30, 2027.

**Basis of Accounting**

The Governmental Funds' financial statements are reported using the modified-accrual basis of accounting.

Hawaii Tourism Authority  
July 31, 2024  
Selected Management Disclosures

**Transient Accommodations Tax (TAT)**

Under Section 237D-6.5, \$11,000,000 shall be allocated to the Convention Center Enterprise Special Fund annually.

**Governance & Org-Wide Expenditures**

Governance and organization-wide expenditures include board member inter-island travel, meeting minutes, insurance premiums, and audit expenses for the Authority and the HCC.

**Investments**

The Authority's investments are reported at fair value.

The TSF and CCESF participate in the State's investment pool program directed by B&F.

**Encumbrances**

Encumbrances are obligations in the form of purchase orders, contracts, or other commitments that only become liabilities once the performance of the conditions stated in the commitment is completed.

Per HRS 40-90 (b), "All encumbrances for contracts shall become void after five years from the end of the fiscal year of the original encumbrance, provided that the comptroller may grant an exemption from this subsection if the comptroller finds that there is sufficient justification to extend a contract encumbrance."

**Use of Estimates**

Preparing these financial statements required management to make estimates and assumptions that affect the amounts reported in the basic financial statements and accompanying notes. Actual results may differ from those estimates.

**2. Accrued Vacation Liability**

On June 30, 2023, management estimated the accrued vacation liability of approximately \$339,000, with a current liability of approximately \$132,000.

**3. Retirement Benefits**

**Employees' Retirement System of the State of Hawaii (ERS)**

At June 30, 2023, management reported a net pension liability of approximately \$6,063,000 for its proportionate share of the State's net pension liability. An actuarial valuation determined the net pension liability as of June 30, 2022.

For the year ended June 30, 2023, the Authority recognized pension expenses of approximately \$335,000. On June 30, 2023, management estimated the deferred outflows and deferred inflows of resources related to pensions of approximately \$576,000 and (\$571,000), respectively.

**Hawaii Employer-Union Health Benefits Trust Fund (EUTF)**

On June 30, 2023, management estimated the net other post-employment benefits (OPEB) liability of approximately \$4,808,000. An actuarial valuation measured the net OPEB liability as of July 1, 2022.

For the year ended June 30, 2023, the Authority recognized OPEB expenses of approximately \$18,000. On June 30, 2023, management estimated the deferred outflows and deferred inflows of resources related to OPEB of approximately \$227,000 and (\$536,000), respectively.



**The State of Hawai`i**  
**Department of Business, Economic Development, and Tourism**  
**Hawai`i Tourism Authority**  
**Financial Statements**  
**August 31, 2024**

These financial statements have been prepared by HTA management (unless otherwise noted) for information purposes only. See notes to the financial statements.

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Prepared by: Talon Kishi, CPA

HTA Budget and Fiscal Officer

HAWAI`I TOURISMAUTHORITY

Hawaii Tourism Authority  
August 31, 2024  
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**Hawaii Tourism  
Authority Balance  
Sheet  
As of August 31, 2024**

	<b>Tourism Funds</b>	<b>Convention Center Funds</b>	<b>Roof Repair Project and Roof Related Repairs</b>	<b>Tourism Emergency Special Fund</b>	<b>EDA-ARPA State Tourism Grant</b>	<b>Total</b>
<b>Assets</b>						
General Funds	65,673,466	2,078,262	-	-	-	67,751,728
Special Funds (restricted)	8,431,851	47,754,689	-	-	-	56,186,540
Federal Grants	-	-	-	-	9,056,717	9,056,717
General Obligation Bonds (GOB)	-	-	14,472,073	-	-	14,472,073
Cash and Cash Equivalents	-	-	-	672,940	-	672,940
<b>Total Assets</b>	<b>74,105,317</b>	<b>49,832,951</b>	<b>14,472,073</b>	<b>672,940</b>	<b>9,056,717</b>	<b>148,139,998</b>
<b>Liabilities and Fund Balances</b>						
<b>Fund Balances</b>						
Encumbered - General Funds	8,741,784	2,078,262	-	-	-	10,820,046
Unencumbered - General Funds	56,931,682	-	-	-	-	56,931,682
<b>Total General Fund Balances</b>	<b>65,673,466</b>	<b>2,078,262</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>67,751,728</b>
Encumbered - Special Funds	911,077	501,432	-	162,763	6,000,345	7,575,617
Unencumbered - Special Funds	7,520,774	47,253,257	-	510,177	3,056,372	58,340,580
<b>Total Special Fund Balances</b>	<b>8,431,851</b>	<b>47,754,689</b>	<b>-</b>	<b>672,940</b>	<b>9,056,717</b>	<b>65,916,197</b>
Encumbered - GOB	-	-	14,472,073	-	-	14,472,073
Unencumbered - GOB	-	-	-	-	-	-
<b>Total GOB Fund Balance</b>	<b>-</b>	<b>-</b>	<b>14,472,073</b>	<b>-</b>	<b>-</b>	<b>14,472,073</b>
<b>Total Fund Balances</b>	<b>74,105,317</b>	<b>49,832,951</b>	<b>14,472,073</b>	<b>672,940</b>	<b>9,056,717</b>	<b>148,139,998</b>
<b>Total Liabilities and Fund Balances</b>	<b>74,105,317</b>	<b>49,832,951</b>	<b>14,472,073</b>	<b>672,940</b>	<b>9,056,717</b>	<b>148,139,998</b>

\* Refer to notes of the financial statements for more information.



**Hawaii Tourism Authority**  
**Tourism General Fund - Fiscal Year 2025**  
**Statement of Revenues, Expenditures, Changes in Fund**  
**Balances, and Budget vs. Actual August 31, 2024**

	Paid Month Ended August 31, 2024	Actual			FY 25 Budget	Budget vs. Actual
		Paid Year to Date	Remaining Encumbrances	Budget Restriction		Under (Over) Budget
<b>Revenues</b>						
Refunds	-	-	-	-	-	-
	-	-	-	-	-	-
<b>Expenditures</b>						
Administration and Governance	239,852	239,852	229,237	369,666	3,696,660	2,857,905
Branding and Marketing	35,935	35,935	6,167,552	3,924,920	39,249,201	29,120,794
Sports and Signature Events	-	-	-	731,808	7,318,075	6,586,267
Dest. Stewardship and Community	21,550	21,550	-	792,388	7,923,883	7,109,945
Regenerative Tourism Development	26,168	26,168	-	376,218	3,762,181	3,359,795
Workforce Development	-	-	-	105,000	1,050,000	945,000
Total	323,505	323,505	6,396,789	6,300,000	63,000,000	49,979,706
Change in Fund Balance	(323,505)	(323,505)				
<b>Fund Balances</b>						
July 1, 2024 / July 1, 2024	63,000,000	63,000,000				
August 31, 2024	62,676,495	62,676,495				

\* Refer to notes of the financial statements for more information.

**Hawaii Tourism Authority**  
**Fiscal Year 2024 Tourism General Fund**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Encumbrances**  
**August 31, 2024**

	<b>Paid Month Ended August 31, 2024</b>	<b>Paid Year to Date</b>	<b>Remaining Encumbrances</b>
<b>Revenues</b>			
Refunds	-	-	-
	-	-	-
<b>Expenditures</b>			
Administration	-	-	-
Branding	81,998	1,881,998	950,285
Destination Management	4,388,676	4,388,676	845,160
Governance and Org-Wide*	-	-	147,200
HCC Marketing	-	-	-
Perpetuating Hawaiian Culture	-	-	204,583
Planning & Evaluation	14,366	14,366	127,531
Resident and Industry Comms	48,000	48,000	46,236
Safety & Security	-	-	-
Salaries	8,440	8,440	-
Sports	-	-	-
Workforce Development	-	-	24,000
Total	4,541,481	6,341,481	2,344,995
Change in Fund Balance	(4,541,481)	(6,341,481)	
<b>Fund Balances</b>			
August 1, 2024 / July 1, 2024	7,538,452	9,338,452	
August 31, 2024	2,996,971	2,996,971	

\* Refer to notes of the financial statements for more information.

\*\* More information provided with the budget vs. actual statement.

**Hawaii Tourism Authority**  
**Tourism Special Fund - Prior Year Funds**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Encumbrances**  
**August 31, 2024**

	<b>Paid Month Ended August 31, 2024</b>	<b>Paid Year to Date</b>	<b>Remaining Encumbrances</b>
<b>Revenues</b>			
Interest, Net	47,696	47,696	-
Total	47,696	47,696	-
<b>Expenditures</b>			
Administration	-	-	52,203
Branding	23,965	23,965	520,272
Destination Management	-	-	230,000
Resident and Industry Comms	-	-	22,602
Workforce Development	-	-	86,000
Total	23,965	23,965	911,077
Change in Fund Balance	23,731	23,731	
<b>Fund Balances</b>			
August 1, 2024 / July 1, 2024	8,408,120	8,408,120	
August 31, 2024	8,431,851	8,431,851	

\* Refer to notes of the financial statements for more information.

**Hawaii Tourism Authority**  
**Convention Center General Fund - Fiscal Year 2024**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Encumbrances**  
**August 31, 2024**

	<b>Paid Month Ended August 31, 2024</b>	<b>Paid Year to Date</b>	<b>Remaining Encumbrances</b>
<b>Revenues</b>			
Refunds	-	-	-
	-	-	-
<b>Expenditures</b>			
HCC Marketing	-	-	-
HCC Operations	-	-	2,078,262
HCC Repairs and Maintenance	-	-	-
Total	-	-	2,078,262
Change in Fund Balance	-	-	
<b>Fund Balances</b>			
August 1, 2024 / July 1, 2024	2,078,262	2,078,262	
August 31, 2024	2,078,262	2,078,262	

\* Refer to notes of the financial statements for more information.

**Hawaii Tourism Authority**  
**Convention Center Enterprise Special Fund**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Encumbrances**  
**August 31, 2024**

	<b>Paid Month Ended August 31, 2024</b>	<b>Paid Year to Date</b>	<b>Remaining Encumbrances</b>
<b>Revenues</b>			
TAT	-	-	-
Total	-	-	-
<b>Expenditures</b>			
HCC Marketing	-	-	-
HCC Operations	-	-	501,432
HCC Repairs and Maintenance	-	-	-
Total	-	-	501,432
Change in Fund Balance	-	-	
<b>Fund Balances</b>			
August 1, 2024 / July 1, 2024	47,754,689	47,754,689	
August 31, 2024	47,754,689	47,754,689	

\* Refer to notes of the financial statements for more information.

**Hawaii Tourism Authority**  
**Roof Repair Project and Roof Related Repairs**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Encumbrances**  
**August 31, 2024**

	<b>Paid Month Ended August 31, 2024</b>	<b>Paid Year to Date</b>	<b>Remaining Encumbrances</b>
<b>Revenues</b>			
Refunds	-	-	-
	-	-	-
<b>Expenditures</b>			
HCC Full Roof Repair	100,315	100,315	787,973
HCC Roof Related Projects	-	-	13,684,100
Total	100,315	100,315	14,472,073
Change in Fund Balance	(100,315)	(100,315)	
<b>Fund Balances</b>			
August 1, 2024 / July 1, 2024	14,572,388	14,572,388	
August 31, 2024	14,472,073	14,472,073	

\* Refer to notes of the financial statements for more information.

**Hawaii Tourism Authority**  
**Tourism Emergency Special Fund**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Encumbrances**  
**August 31, 2024**

	<b>Paid Month Ended August 31, 2024</b>	<b>Paid Year to Date</b>	<b>Remaining Encumbrances</b>
<b>Revenues</b>			
Change in Fair Value	<u>Paid To Date</u>	-	-
Interest, Net	-	-	-
Total	-	-	-
<b>Expenditures</b>			
Administration	-	-	-
Branding	-	-	-
Destination Management	-	-	150,000
Planning & Evaluation	25,000	25,000	-
Resident and Industry Comms	74,219	74,219	12,763
Safety and Security	-	-	-
Total	99,219	99,219	162,763
Change in Fund Balance	(99,219)	(99,219)	
<b>Fund Balances</b>			
August 1, 2024 / July 1, 2024	772,159	772,159	
August 31, 2024	672,940	672,940	

\* Refer to notes of the financial statements for more information.

**Hawaii Tourism Authority**  
**EDA-ARPA State Tourism Grant**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Encumbrances**  
**August 31, 2024**

	<b>Paid Month Ended August 31, 2024</b>	<b>Paid Year to Date</b>	<b>Remaining Encumbrances</b>
<b>Revenues</b>			
Refunds	-	-	-
	-	-	-
<b>Expenditures</b>			
Administration	-	-	-
Branding	-	2,500,000	-
Destination Management	-	-	6,000,345
Planning & Evaluation	-	-	-
Salaries and Fringe	-	-	-
Total	-	2,500,000	6,000,345
Change in Fund Balance	-	(2,500,000)	
<b>Fund Balances</b>			
August 1, 2024 / July 1, 2024	9,056,717	11,556,717	
August 31, 2024	9,056,717	9,056,717	

\* Refer to notes of the financial statements for more information.



Hawaii Tourism Authority  
August 31, 2024  
Selected Management Disclosures

**1. Summary of Significant Accounting Policies**

The Hawaii Tourism Authority (HTA or Authority) was established on January 1, 1999, by Act 156, Session Laws of Hawaii 1998. It was placed within the State of Hawaii, Department of Business, Economic Development, and Tourism, for administrative purposes only. The Authority is responsible for developing a strategic tourism marketing plan and developing measures of effectiveness to assess the overall benefits and effectiveness of the marketing plan and progress toward achieving the Authority's strategic plan goals. In addition, effective July 1, 2000, control and management of the Hawaii Convention Center (HCC) were transferred to the Authority from the Convention Center Authority (CCA) by Executive Order No. 3817. Effective July 1, 2002, the Center, by statute, became the responsibility of the Authority. The Center opened to the public in June 1998 and is used for various events, including conventions and trade shows, public shows, and spectator events. The Center offers approximately 350,000 square feet of rentable space, including 51 meeting rooms.

The Authority is governed by a board of directors comprising 12 voting members, including those recommended by the State Legislature. The Governor of the State appoints the 12 voting members.

**Funds**

The Authority's funds are as follows:

**Tourism Funds:**

- **Tourism Special Fund (TSF)** –The TSF accounted for functions related to developing and promoting the tourism industry. Effective January 1, 2022, pursuant to Act 1 Special Legislative Session 2021, the TSF was sunset and discontinued the ability to expend any new funds. Funds encumbered as of June 30, 2021, can be spent until June 30, 2026.
- **Fiscal Year 2024 General Funds** – The 2023 State legislature did not provide HTA with an operating budget for fiscal year 2024. As such, the Governor approved the transfer of \$60,000,000 in general funds from Section 5 of Act 164, SLH 2023, to HTA on July 1, 2023. Funds lapsed on June 30, 2024.
- **Fiscal Year 2025 General Funds** – The 2024 Legislature appropriated \$63,000,000 of general funds for HTA's operating budget in Section 3 of Act 230, SLH 2024. The law allocated the \$63,000,000 budget between six program IDs based on each program's objectives. The six program IDs are Administration and Governance, Branding and Marketing, Destination Stewardship and Community, Regenerative Tourism Development, Sports and Signature Events, and Workforce Development. The law provided the funding via General Funds. As such, Budget and Finance's 10% restriction on all General Fund Appropriations applies. The HTA staff and board have discussed the matter and have informed all major vendors to adjust plans and budgets accordingly. Funds will lapse on June 30, 2025.

**Convention Center Funds:**

- **Convention Center Enterprise Special Fund (CCESF)** – Under Section 201B-8, the Convention Center Enterprise Special Fund accounts for functions related to the operation and management of the Hawaii Convention Center (HCC). The 2024 Legislature provided the CCESF with a \$34,000,000 expenditure ceiling in Section 3 of Act 230, SLH 2024. The expenditure ceiling will lapse on June 30, 2025.
- **Fiscal Year 2024 General Funds (operations)** – The 2023 State legislature did not provide the HCC with an operating budget for fiscal year 2024. As such, the Governor approved the transfer

Hawaii Tourism Authority  
August 31, 2024  
Selected Management Disclosures

of \$11,000,000 in general funds from Section 5 of Act 164, SLH 2023, for the HCC on July 1, 2023. Funds lapsed on June 30, 2024. Funds encumbered as of June 30, 2024, can be spent until June 30, 2029.

- **General Funds (CIP)** - Pursuant to Act 164, SLH 2023, \$64,000,000 of general funds were provided for long-term repairs of the HCC rooftop terrace deck. Per Executive Memorandum 23-08, dated October 30, 2023, the Department of Budget and Finance (B&F) transferred HTA's \$64,000,000 operating appropriation to B&F for the Maui wildfires.
- **General Obligation Bonds** – Under Act 248, SLH 2022, \$15,000,000 of general obligation bond funds were provided for the temporary repairs of the HCC roof repair and other items. The Governor authorized the release of funds on February 22, 2023. Unused funds will lapse on June 30, 2024.

The 2024 Legislature appropriated \$64,000,000 of General Obligation Bonds for the HCC Roof Repair Project in Section 3 of Act 230, SLH 2024. Funds will lapse on June 30, 2027.

**Tourism Emergency Special Fund:**

- The Tourism Emergency Special Fund accounts for functions related to maintaining a tourism emergency fund. Per Section 201B-10, revenues prescribed by Section 237D-6.5(b) and all investment earnings are credited to the fund's assets. Funds are currently held at the Bank of Hawaii. Funds must be exclusively used to respond to a tourism emergency per Section 201B-9.

On August 19, 2023, the governor declared a tourism emergency in the sixth emergency proclamation relating to the Maui wildfires. The Governor extended the tourism emergency in the sixteenth emergency proclamation dated July 19, 2024.

**Federal Funds:**

- **American Rescue Plan Act (ARPA)** – Official Name: Coronavirus State Fiscal Recovery Fund (CSFRF) Subaward. The former Governor authorized \$106,000,000 of ARPA funds to support HTA's and HCC's fiscal years 2022 and 2023 operations. HTA and HCC received \$95,000,000 and \$11,000,000, respectively. In total, for the two years ending June 30, 2023, \$59,155,512 and \$10,011,197 were spent on HTA and HCC operations, respectively. The Authority returned \$36,833,291 to the Department of Budget and Finance (B&F) on July 31, 2023.
- **Economic Development Administration (EDA) Tourism Grant** – Official Name: ARPA-EDA Tourism Grant (Non-Competitive ARPA State Tourism Grant for the State of Hawaii) – The Authority was awarded \$14,024,372 on December 8, 2021. Grant rules required the approval of the Grant Administration Plan (GAP) before the commencement of work. EDA approved the Authority's GAP on March 21, 2023. The Authority will share approximately \$7,200,000 of the grant with the Department of Land and Natural Resources (DLNR) to enhance and develop Hawaii's outdoor recreational assets. All work must be completed by May 31, 2027, and money spent by September 30, 2027.

**Basis of Accounting**

The Governmental Funds' financial statements are reported using the modified-accrual basis of accounting.

Hawaii Tourism Authority  
August 31, 2024  
Selected Management Disclosures

**Transient Accommodations Tax (TAT)**

Under Section 237D-6.5, \$11,000,000 shall be allocated to the Convention Center Enterprise Special Fund annually.

**Governance & Org-Wide Expenditures**

Governance and organization-wide expenditures include board member inter-island travel, meeting minutes, insurance premiums, and audit expenses for the Authority and the HCC.

**Investments**

The Authority's investments are reported at fair value.

The TSF and CCESF participate in the State's investment pool program directed by B&F.

**Encumbrances**

Encumbrances are obligations in the form of purchase orders, contracts, or other commitments that only become liabilities once the performance of the conditions stated in the commitment is completed.

Per HRS 40-90 (b), "All encumbrances for contracts shall become void after five years from the end of the fiscal year of the original encumbrance, provided that the comptroller may grant an exemption from this subsection if the comptroller finds that there is sufficient justification to extend a contract encumbrance."

**Use of Estimates**

Preparing these financial statements required management to make estimates and assumptions that affect the amounts reported in the basic financial statements and accompanying notes. Actual results may differ from those estimates.

**2. Accrued Vacation Liability**

On June 30, 2023, management estimated the accrued vacation liability of approximately \$339,000, with a current liability of approximately \$132,000.

**3. Retirement Benefits**

**Employees' Retirement System of the State of Hawaii (ERS)**

At June 30, 2023, management reported a net pension liability of approximately \$6,063,000 for its proportionate share of the State's net pension liability. An actuarial valuation determined the net pension liability as of June 30, 2022.

For the year ended June 30, 2023, the Authority recognized pension expenses of approximately \$335,000. On June 30, 2023, management estimated the deferred outflows and deferred inflows of resources related to pensions of approximately \$576,000 and (\$571,000), respectively.

**Hawaii Employer-Union Health Benefits Trust Fund (EUTF)**

On June 30, 2023, management estimated the net other post-employment benefits (OPEB) liability of approximately \$4,808,000. An actuarial valuation measured the net OPEB liability as of July 1, 2022.

For the year ended June 30, 2023, the Authority recognized OPEB expenses of approximately \$18,000. On June 30, 2023, management estimated the deferred outflows and deferred inflows of resources related to OPEB of approximately \$227,000 and (\$536,000), respectively.

Hawaii Tourism Authority  
August 31, 2024  
Selected Management Disclosures

**4. Maui Response and Recovery - Tourism Emergency Special Fund**

The Authority prepared a \$5,000,000 emergency response plan for the Maui Wildfire, approved by the board on December 21, 2023, with all projects scheduled to end on June 30, 2024. Spending to date is summarized below:

<b>Maui Response and Recovery - Tourism Emergency Special Funds Spending to 8/31/24</b>			
<b>Program</b>	<b>Budget</b>	<b>Paid to Date</b>	<b>Unspent</b>
USA Recovery Marketing Program #1	2,600,000	2,600,000	0
USA Recovery Marketing Program #2	1,350,000	1,350,000	0
Maui Resident Communications Campaign	349,307	337,958	11,349
Visitor Education Post-Arrival Marketing	300,000	150,000	150,000
Immediate Wildfire Response	250,693	250,693	0
Maui Street Market (cancelled)	100,000	0	100,000
Long-term Housing (budget reduced to \$25,000)	50,000	25,000	25,000
<b>Total</b>	<b>5,000,000</b>	<b>4,713,651</b>	<b>286,349</b>

**Supplementary Information**

**Hawaii Tourism Authority**  
**Supplementary Information**  
**Budget vs. Actual**  
**Tourism General Funds - Fiscal Year 2025**  
**July 1, 2024 to August 31, 2024**

Budget Line Item (BLI) Title	BLI Code	Paid To Date	Remaining Encumbrance To Date	Budget Restriction	Actual To Date (Paid + Encumbrance + Restriction)	Fiscal Year 2025 Budget	Budget vs. Actual
<b>Administration and Governance</b>	<b>BED113</b>						
Cruise Infrastructure Imprv. and Arrival Experience	004	0	0	8,900	8,900	89,000	80,100
HTUS/HTJ Campaign Effectiveness Study	010	0	0	18,000	18,000	180,000	162,000
Community-Industry Outreach & PR Svcs	101	0	0	25,000	25,000	250,000	225,000
hawaiiitourismauthority.org	103	0	0	2,500	2,500	25,000	22,500
Travel - Branding	398	0	0	5,000	5,000	50,000	45,000
Program Evaluation	654	0	0	9,000	9,000	90,000	81,000
Travel - Destination Stewardship	898	0	0	5,000	5,000	50,000	45,000
General and Administrative	901	0	34,719	81,268	115,987	793,934	677,947
Organization-Wide	915	0	0	46,111	46,111	461,111	415,000
Governance - Gen Board Others	919	0	45,743	3,000	48,743	48,743	0
State Employee Salaries - Admin	930	0	0	159,887	159,887	1,598,872	1,438,985
Travel - Admin	998	0	1,458	6,000	7,458	60,000	52,542
<b>Administration and Governance</b>	<b>Total BED113</b>	<b>0</b>	<b>81,920</b>	<b>369,666</b>	<b>451,586</b>	<b>3,696,660</b>	<b>3,245,074</b>
<b>Branding and Marketing</b>	<b>BED114</b>						
Island-Based International Marketing	306	0	0	160,000	160,000	1,600,000	1,440,000
Convention Center Sales & Marketing - City Wide	317	0	0	263,388	263,388	2,633,884	2,370,496
gohawaii.com	318	0	0	45,833	45,833	458,333	412,500
MCI MFF	319	0	0	140,888	140,888	1,408,882	1,267,994
Island Chapters Staffing and Admin	320	0	0	160,000	160,000	1,600,000	1,440,000
US (formerly North America)	321	0	0	1,672,445	1,672,445	16,724,445	15,052,000
Canada	322	0	0	100,000	100,000	1,000,000	900,000
Japan	323	0	0	650,000	650,000	6,500,000	5,850,000
Korea	324	0	398,276	90,000	488,276	900,000	411,724
Oceania	325	0	0	129,091	129,091	1,290,905	1,161,814
Europe	326	0	900,000	100,000	1,000,000	1,000,000	0
Meetings, Convention & Incentives	331	0	0	263,388	263,388	2,633,884	2,370,496
Global Digital Marketing Strategy	339	0	0	45,833	45,833	458,333	412,500
Global Mkt Shared Resources	350	0	0	45,834	45,834	458,334	412,500
State Employee Salaries - Branding	934	0	0	58,220	58,220	582,201	523,981
<b>Branding and Marketing</b>	<b>Total BED114</b>	<b>0</b>	<b>1,298,276</b>	<b>3,924,920</b>	<b>5,223,196</b>	<b>39,249,201</b>	<b>34,026,005</b>
<b>Sports and Signature Events</b>	<b>BED115</b>						
PGA Tour Contracts	312	0	0	203,885	203,885	2,038,850	1,834,965
LPGA	343	0	0	25,000	25,000	250,000	225,000
Surfing	374	0	0	33,333	33,333	333,333	300,000
Basketball	376	0	0	83,333	83,333	833,333	750,000
UH Athletics Branding Partnership	378	0	0	18,556	18,556	185,556	167,000
Sports RFP or Other Procurement	385	0	0	196,930	196,930	1,969,303	1,772,373
Signature Events	700	0	0	163,077	163,077	1,630,766	1,467,689
State Employee Salaries - Sports and SE	937	0	0	7,694	7,694	76,934	69,240
<b>Sports and Signature Events</b>	<b>Total BED115</b>	<b>0</b>	<b>0</b>	<b>731,808</b>	<b>731,808</b>	<b>7,318,075</b>	<b>6,586,267</b>
<b>Destination Stewardship and Community</b>	<b>BED116</b>						
Pono Travel Education Program	014	0	0	96,415	96,415	964,148	867,733
Aloha Aina (formerly NR and Leg Prov NR)	402	0	0	78,402	78,402	784,022	705,620
Visitor Assistance Programs	601	0	0	65,000	65,000	650,000	585,000
Resort Area Hawaiian Cultural Initiative	718	0	0	78,402	78,402	784,022	705,620
Community-Based Tourism - Oahu	731	0	0	15,554	15,554	155,539	139,985
Community-Based Tourism - Maui County	732	0	0	15,554	15,554	155,539	139,985
Community-Based Tourism - Hawaii Island	733	0	0	15,554	15,554	155,538	139,984
Community-Based Tourism - Kauai	734	0	0	15,553	15,553	155,538	139,985
Destination Management Application	740	0	0	350,000	350,000	3,500,000	3,150,000
State Employee Salaries - Destination Stewardship	938	0	0	61,954	61,954	619,537	557,583
<b>Destination Stewardship and Community</b>	<b>Total BED116</b>	<b>0</b>	<b>0</b>	<b>792,388</b>	<b>792,388</b>	<b>7,923,883</b>	<b>7,131,495</b>

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<b>Regenerative Tourism Development</b>	<b>BED117</b>						
Kukulu Ola: Living Hawaiian Cultural Prog	201	0	0	78,402	78,402	784,022	705,620
Community Tourism Collaborative	656	0	0	168,260	168,260	1,682,603	1,514,343
Community Enrichment Program	701	0	0	106,627	106,627	1,066,270	959,643
State Employee Salaries - Regenerative Tourism	939	0	0	22,929	22,929	229,286	206,357
<b>Regenerative Tourism Development</b>	<b>Total BED117</b>	<b>0</b>	<b>0</b>	<b>376,218</b>	<b>376,218</b>	<b>3,762,181</b>	<b>3,385,963</b>
<b>Workforce Development</b>	<b>BED118</b>						
Hawai'i Tourism Summit	102	0	0	30,000	30,000	300,000	270,000
Hawaiian Culture Initiative	202	0	0	25,000	25,000	250,000	225,000
Future Workforce Development (LEI)	803	0	0	15,000	15,000	150,000	135,000
Scholarship Program	805	0	0	35,000	35,000	350,000	315,000
<b>Workforce Development</b>	<b>Total BED118</b>	<b>0</b>	<b>0</b>	<b>105,000</b>	<b>105,000</b>	<b>1,050,000</b>	<b>945,000</b>
<b>Total Fiscal Year 25 Tourism General Funds</b>		<b>0</b>	<b>1,380,196</b>	<b>6,300,000</b>	<b>7,680,196</b>	<b>63,000,000</b>	<b>55,319,804</b>

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<b>Destination Management</b>	<b>01</b>					
Pono Travel Education Program	014	1,122,215	488,684	1,610,899	1,610,899	0
Kukulu Ola: Living Hawaiian Cultural Prog	201	1,815,000	150,000	1,965,000	1,965,000	0
Hawaiian Culture Festivals and Events	218	30,000	0	30,000	30,000	0
Aloha Aina (formerly NR and Leg Prov NR)	402	1,851,500	150,000	2,001,500	2,001,500	0
Tour Guide Certification Licensure Program	409	21,000	78,600	99,600	99,600	0
Hotspot Mitigation	653	65,000	70,000	135,000	135,000	0
Community Tourism Collaborative	656	799,657	0	799,657	799,657	0
Tourism Excellence Accreditation	657	146,125	127,875	274,000	274,000	0
Signature Events	700	3,385,000	0	3,385,000	3,385,000	0
Community Enrichment Program	701	2,612,081	0	2,612,081	2,612,081	0
Resort Area Hawaiian Cultural Initiative	718	750,000	0	750,000	750,000	0
<b>Destination Management</b>	<b>Total 01</b>	<b>12,597,578</b>	<b>1,065,159</b>	<b>13,662,737</b>	<b>13,662,737</b>	<b>0</b>
<b>Planning and Evaluation</b>	<b>02</b>					
Cruise Infrastructure Improvements and Arrival Experienc	004	110,242	0	110,242	111,000	758
HTUS/HTJ Campaign Effectiveness Study	010	213,000	0	213,000	213,000	0
Infrastructure Research (Accomodations and Airseats)	506	62,351	0	62,351	62,351	0
Tourism Strategic Plan Update	509	56,030	0	56,030	56,030	(0)
Planning Tools and Assessments	652	1,019	45,616	46,635	46,635	(0)
Program Evaluation	654	176,354	0	176,354	176,354	0
Travel - Planning	698	2,927	0	2,927	3,774	847
Community-Based Tourism - Oahu	731	34,310	12,365	46,675	46,675	0
Community-Based Tourism - Maui County	732	24,660	0	24,660	24,660	0
Maui Recovery	737	1,567	0	1,567	1,567	0
<b>Planning and Evaluation</b>	<b>Total 02</b>	<b>682,458</b>	<b>57,981</b>	<b>740,439</b>	<b>742,045</b>	<b>1,606</b>
<b>Workforce</b>	<b>03</b>					
Future Workforce Development (LEI)	803	126,480	12,000	138,480	138,480	0
Scholarship Program	805	0	12,000	12,000	12,000	0
<b>Workforce</b>	<b>Total 03</b>	<b>126,480</b>	<b>24,000</b>	<b>150,480</b>	<b>150,480</b>	<b>0</b>



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<b>Perpetuating Hawaiian Culture</b>	<b>04</b>					
Hawaiian Culture Initiative	202	0	13,000	13,000	29,849	16,849
Ma'ema'e HTA	203	30,000	0	30,000	30,020	20
Market Support	204	40,316	0	40,316	40,316	(0)
Kahea Program - Harbor Greetings	206	190,747	16,583	207,330	207,330	0
Kahea Program - Airport Greetings	207	700,000	0	700,000	700,000	0
Legacy Award Program	214	25,000	25,000	50,000	50,000	0
Olelo Hawaii	216	100,000	100,000	200,000	200,000	0
Memberships and Dues - Hawaiian Culture	297	300	0	300	300	0
Travel - Hawaiian Culture	298	2,603	0	2,603	9,950	7,347
Surfing	374	0	50,000	50,000	50,000	0
<b>Perpetuating Hawaiian Culture</b>	<b>Total 04</b>	<b>1,088,966</b>	<b>204,583</b>	<b>1,293,549</b>	<b>1,317,765</b>	<b>24,216</b>
<b>Sports</b>	<b>05</b>					
PGA Tour Contracts	312	1,947,500	0	1,947,500	1,947,500	0
Sport Opportunity Fund	346	500,000	0	500,000	500,000	0
UH Athletics Branding Partnership	378	166,000	0	166,000	166,000	0
<b>Sports</b>	<b>Total 05</b>	<b>2,613,500</b>	<b>0</b>	<b>2,613,500</b>	<b>2,613,500</b>	<b>0</b>
<b>Safety &amp; Security</b>	<b>06</b>					
Visitor Assistance Programs	601	520,000	0	520,000	520,000	0
<b>Safety &amp; Security</b>	<b>Total 06</b>	<b>520,000</b>	<b>0</b>	<b>520,000</b>	<b>520,000</b>	<b>0</b>
<b>Resident and Industry Communication &amp; Outreach</b>	<b>07</b>					
Community-Industry Outreach & Public Relations Svcs	101	364,881	27,339	392,221	392,221	0
Hawai'i Tourism Summit	102	168,516	0	168,516	168,516	(0)
hawaiiitourismauthority.org (formerly HTA web/Global So	103	24,401	18,447	42,848	43,992	1,144
<b>Resident and Industry Communication &amp; Outreach</b>	<b>Total 07</b>	<b>557,799</b>	<b>45,786</b>	<b>603,585</b>	<b>604,729</b>	<b>1,144</b>

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<b>Branding</b>	<b>08</b>					
Island-Based International Marketing	306	400,000	100,000	500,000	500,000	0
gohawaii.com (formerly Online Website Coordination)	318	0	62,000	62,000	62,000	0
Island Chapters Staffing and Admin	320	2,179,074	240,000	2,419,074	2,419,074	0
US (formerly North America)	321	14,956,927	0	14,956,927	15,069,259	112,332
Canada	322	1,794,501	21,649	1,816,149	1,837,186	21,037
Japan	323	8,368,078	0	8,368,078	8,370,002	1,924
Korea	324	1,159,360	0	1,159,360	1,159,360	0
Oceania	325	1,058,184	63,636	1,121,820	1,121,820	0
Europe	326	518,180	0	518,180	518,180	0
Global Digital Marketing Strategy (former Intl Online Stra	339	0	83,150	83,150	83,150	0
Global Mkt Shared Resources (fka Intellect Prop Data Ban	350	1,275,000	379,850	1,654,850	1,654,850	0
Marketing Opportunity Fund	380	10,000	0	10,000	75,054	65,054
Memberships and Dues - Branding	397	155,314	0	155,314	155,314	0
Travel - Branding	398	34,374	0	34,374	50,000	15,626
<b>Branding</b>	<b>Total 08</b>	<b>31,908,992</b>	<b>950,285</b>	<b>32,859,277</b>	<b>33,075,249</b>	<b>215,972</b>
<b>Convention Center Marketing</b>	<b>09</b>					
Convention Center Sales & Marketing - City Wide	317	2,069,444	0	2,069,444	2,069,444	0
MCI MFF	319	287,000	0	287,000	287,000	0
Meetings, Convention & Incentives	331	1,605,556	0	1,605,556	1,605,556	0
<b>Convention Center Marketing</b>	<b>Total 09</b>	<b>3,962,000</b>	<b>0</b>	<b>3,962,000</b>	<b>3,962,000</b>	<b>0</b>
<b>Administration</b>	<b>10</b>					
General and Administrative	901	280,293	0	280,293	286,602	6,309
Refunds	1003	0	0	0	0	0
Travel - Admin	998	19,894	0	19,894	50,000	30,106
<b>Administration</b>	<b>Total 10</b>	<b>300,186</b>	<b>0</b>	<b>300,186</b>	<b>336,602</b>	<b>36,416</b>
<b>Governance &amp; Org-Wide</b>	<b>11</b>					
Organization-Wide	915	297,783	147,200	444,983	444,983	0
Governance - Gen Board Others	919	53,117	0	53,117	69,910	16,793
<b>Governance &amp; Org-Wide</b>	<b>Total 11</b>	<b>350,900</b>	<b>147,200</b>	<b>498,100</b>	<b>514,893</b>	<b>16,793</b>
<b>Salaries</b>	<b>12</b>					
State Employee Salaries - Admin	930	1,313,425	0	1,313,425	1,313,425	0
State Employee Salaries - Branding	934	821,039	0	821,039	1,186,575	365,536
<b>Salaries</b>	<b>Total 12</b>	<b>2,134,464</b>	<b>0</b>	<b>2,134,464</b>	<b>2,500,000</b>	<b>365,536</b>
<b>Total Fiscal Year 24 Tourism General Funds</b>		<b>56,843,324</b>	<b>2,494,994</b>	<b>59,338,318</b>	<b>60,000,000</b>	<b>661,682</b>