



**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'ALUA, 26 NOWEMAPA 2024, 9:30 AM  
TUESDAY, NOVEMBER 26, 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/86823572969>

*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) 444-9171  
Helu Hālāwai / Webinar ID: 868 2357 2969**

*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 kākā'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. *Ho'onoho I Ka Lālā Hou O Ka Papa Alaka'i*  
**Welcome New Board Member, Todd Apo, to the HTA Board of Directors**
6. *'Āpono Mo'olelo Hālāwai*  
**Approval of Meeting Minutes of the October 3, 2024 Regular Board Meeting**
7. *Hō'ike A Ka Luna Ho'okele*  
**CEO Report**
8. *Hō'ike A Ka Luna Ho'omalū*  
**Board Chair Report**
9. *Hō'ike'ike A Ka Papahana Mālama 'Āina Ho'okipa*  
**Presentation on HTA Destination Stewardship Programs**
10. *Hō'ike'ike Noi'i 'Oihana Ho'okipa*  
**Presentation and Discussion of Current Market Insights and Conditions in Hawai'i and Key Major Hawai'i Tourism Markets**
11. *Hō'ike A Ke Kōmike Mo'ohelu Kālā, 'Oihana Kālā, A Me Ke Kikowaena Hālāwai*  
**Report and Update by the BUDGET, FINANCE, AND CONVENTION CENTER STANDING COMMITTEE**
  - a. *Hō'ike'ike, Noi, Hō'ike'ike, Kūkā, A Ho'oholo No Ka Mo'olelo Kālā*  
**Presentation, Motion, Discussion, and Action on the HTA's September and October 2024 Financial Report; Recommend Approval**
  - b. *Noi, Kūkā A Ho'oholo No Ka Mo'olelo Kālā Kikowaena Hālāwai O Hawai'i*  
**Motion, Discussion, and Action on the Hawai'i Convention Center's (HCC's) August 2024, September 2024, and October 2024 Financial Reports and Update on the Hawai'i Convention Center's 6-Year Repair and Maintenance Plan Recommend Approval**

12. *Hō'ike A Ke Kōmike Alowelo*

**Report and Update by the BRANDING STANDING COMMITTEE**

- a. *Hō'ike'ike A Kūkā No Ka Mākeke 'Amelika*  
**Presentation and/or Discussion on the Los Angeles Saturation Activation and Other Updates from Hawai'i Tourism United States (HTUSA)**
- b. *Hō'ike'ike A Kūkā No Ka Mākeke Iāpana*  
**Presentation and/or Discussion on the JATA Expo, Japan Mission and Other Updates from Hawai'i Tourism Japan (HTJ)**
- c. *Hō'ike No Ka Hana Pūalu Me Brand USA Me Nā Pāhana Hokona Kau'āina*  
**Update on the Partnership with Brand USA and other International Marketing Activities**

13. *Ho'oholo, Kūkā A Hana E Ho'okumu I Hui Noi'i Papahana Hō'ulu'ulu Ho'omalū*  
**Motion, Discussion and Action to Create an HTA Governance Study Permitted Interaction Group for the Purpose of Addressing the Issues Outlined in the Governance Study Deliverable Reports and Final Report Recommendations**

14. *Hō'ike'ike, Kūkākūkā A Ho'oholo No Ka Ho'okuleana Waha'ōlelo*  
**Motion, Discussion and Action to Adopt a Board Resolution for the Delegation of Authority to Present Policy Positions**

15. *Kūkākūkā No Ka Ho'okuleana I Nā Kōmike Me Nā Hui Noi'i*  
**Discussion on the Membership of Standing Committees and Permitted Interaction Groups**

16. *Ho'okuleana I Nā Kōmike Me Nā Hui Noi'i*  
**Action to Elect Board Members to Standing Committees and Permitted Interaction Groups**

17. *Hō'ike Holomua A Ka Hui Noi'i 'Imi Luna Ho'okele*  
**Progress Update from the Permitted Interaction Group to Assist in the Selection Process for the Position of President and CEO of the Hawai'i Tourism Authority**

18. *Kūkākūkā A Ho'oholo No Nā Kumuhana Pili Limahana\*\*\**  
**Discussion and/or Action on Personnel Issues\*\*\***

19. *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 4 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.

**06**

**Approval of Minutes of the October 3, 2024  
Regular Board Meeting**



**REGULAR BOARD MEETING**  
**HAWAII TOURISM AUTHORITY**  
**Thursday, October 3, 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, Zoom), Kimberly Agas, David Arakawa, Stephanie Iona, James McCully, Blaine Miyasato, Roy Pfund, James Tokioka (Ex Officio, DBEDT Director), Mike White

**MEMBERS NOT PRESENT:**

Chris West

**HTA STAFF PRESENT:**

Daniel Nāho'opi'i, Kalani Ka'anā'anā, Isaac Choy, Talon Kishi, Caroline Anderson, Jadie Goo, Ilihia Gionson, Iwalani Kūali'i Kaho'ohanohano, Jennifer Bastiaanse, Carole Hagihara

**GUESTS:**

Teri Orton, Daniel Ito, Laci Goshi, Alison Schaefer, Jeffrey Eslinger, Lei-Ann Field, Susan Webb, Colin Wood, Darragh Walshe, Nathan Kam, Kris Phadunshiato, Kara Imai, Sue Kanoho, Tyler Gomes, Andrew Koh, Eric Takahata, Jessica Lani Rich, Dennis Suo, William Zhang, Lynn Whitehead, Kau'i Arce, Krislyn Hashimoto, Irene Lee, Darlene Morikawa, Andreas Schunck, Aaron Salā

**LEGAL COUNSEL:**

John Cole

## **1. Call to Order**

Chair Hannemann called the meeting to order at 9:31 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 Non-public**

Mr. Gionson did the roll call, and all Board members were in attendance except for Mr. West. Ms. Paishon attended via Zoom.

## **3. Opening Protocol**

Mr. Ka'anā'anā did 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**

### **a. August 29, 2024 Regular Board Meeting**

### **b. September 13, 2024 Special Board Meeting**

Mr. Miyasato made the motion to adopt the minutes, and Ms. Iona seconded, and the motion passed unanimously.

## **6. CEO Report**

Mr. Nāho'opi'i greeted Board members and expressed his gratitude to everyone participating in the recent HTA Tourism Conference. He noted that all Board members had been involved in planning, participation, and panel discussions, and he extended his thanks to others in the room who had played a key role in sharing the Hawai'i tourism story.

Mr. Nāho'opi'i mentioned that the Board members' information packet contained a detailed CEO report, from which he would highlight certain points. He reminded Board members that he had participated in the Lieutenant Governor's Korea mission, which included Dir. Tokioka of the Department of Business, Economic Development and Tourism (DBEDT) and Mr. Kuhio Lewis, the CEO of the Council for Native Hawaiian Advancement (CNHA). During the mission, they met with the Mayor of Seoul, the Governor of Jeju, and the Jeju Tourism Organization. Mr. Nāho'opi'i specifically thanked Ms. Irene Lee for coordinating these meetings. Additionally,

discussions had taken place with Korean Airlines, Air Premier, Air Mode, and Smilegate. One of the mission's outcomes had been exploring opportunities related to e-games and tournaments, viewing them as both sports and MCI (Meetings, Conventions, and Incentives) events. Smilegate had brought its programmers to Hawai'i as part of an incentive program every other year, and its CEO remarked that these trips positively affected their productivity. The typically reserved programmers become more open and shop and explore Hawai'i. Mr. Nāho'opi'i had also taken part in conversations with the Mayors of Seoul and Jeju, highlighting various cooperative conferences focused on sustainability and smart cities, which aligned with Hawai'i's goals for regenerative tourism. Both Seoul and Jeju were making efforts to achieve these aims at the city and state level.

Mr. Nāho'opi'i reminded Board members that the Governor's declaration of a tourism emergency remained in effect until November 16. This declaration is related to certain topics scheduled for discussion during the present meeting. He also informed Board members that the Legislative Auditor had begun their work and had determined that the audit of the HTA would focus on two key areas:

1. Firstly, an assessment of the HTA's achievement of its 2016 and 2020–2025 strategic plans, particularly in the realm of destination management goals and
2. Secondly, an evaluation of the effectiveness of the Destination Management Action Plans (DMAPs) will be made, along with recommendations where appropriate.

Mr. Nāho'opi'i expressed his eagerness to collaborate closely with the Legislative Auditor. He stated that the preparation for the next round of DMAPs would be an opportune moment for evaluations and recommendations. Regarding destination stewardship, the CEO's report reviewed the Mana Mele program, which had received an investment of \$40,000. The program developed meaningful content to communicate traditional practices, concerts, and interactions with visitors and residents. Mr. Nāho'opi'i also highlighted the Duke Ocean Fest, a signature event supported with \$65,000. This international festival, popular in Oceania, Australia, and New Zealand, engaged residents and attracted visitors. Furthermore, the community program Ho'olaule'a o Waimea at Waimea Valley Park has been well-received by residents, with many visitors also attending the events and concerts. The Kilohana presentation later in the present meeting would give more information about these events and post-arrival messaging, Maui wildfire funding, and cultural performances at airports.

Mr. Nāho'opi'i did not discuss branding issues since the global marketing teams would give presentations later in the meeting. He stated that planning and evaluation of productivity scholarships was underway. Destination management action plans had begun to function, with the initial stage of strategic plan incorporating not only the HTA but also statewide tourism plans involving other government agencies. Ms. Anderson would be involved in the inception of



these strategies over the following months. Committees and groups were to be formed with the Board, external partners, and stakeholders. Board members were invited to share comments and contributions regarding reactions from community members and the visitor industry.

## **7. Board Chair Report**

Chair Hannemann expressed his gratitude to the hardworking staff of the HTA for their efforts in organizing the Tourism Conference, noting that it had been a successful collaboration with the Hawai'i Visitors and Convention Bureau (HVCB), the Council for Native Hawaiian Advancement (CNHA), and the Hawai'i Lodging & Tourism Association (HLTA). The conference not only provided an opportunity for industry professionals to share ideas but also allowed active participation and contribution of ideas from many community members and organizations.

Chair Hannemann also expressed his appreciation for the presence of the representatives of federal partners, such as Mr. Fred Dixon, President and CEO of Brand USA, and Mr. Alex Lazry, Deputy Assistant Secretary for Travel and Tourism at the International Trade Administration. Both these officials recognized Hawai'i as an important destination and were eager to support it. The Chair, along with Mr. Nāho'opi'i, had held several meetings with them, with plans for follow-up discussions.

Chair Hannemann also reminded Board members of his missions to Los Angeles and Tokyo. Emphasizing his belief in the value of repetition, the Chair introduced a video that had been seen on several previous occasions. There had been concerns regarding Hawai'i's messaging, particularly among influencers and important officials. Chair Hannemann noted that both the Governor and the Mayor of Maui had stressed the importance of clarity and alignment in messaging.

Chair Hannemann expressed special appreciation for the key role of Mr. Jay Talwar, the Chief Marketing Officer of HVCB, in organizing the Los Angeles saturation mission and program. The Chair noted that 100 businesses were involved, with 60 actively participating in amplifying the message and ensuring the provision of incentives. Marriott Hotels have been particularly helpful in this effort. Additionally, he thanked Mr. Miyasato and Hawaiian Airlines for helping make the trip first-class experience. Both Gov. Green and Mayor Bissen had been very pleased with the outcome, and Chair Hannemann anticipated positive future results from this mission.

Regarding the Mana Up event with Meli James, Chair Hannemann mentioned that the initial expectation had been 5,000 participants, but the actual attendance reached 10,000. This event generated substantial economic activity, involving 40 small businesses, 10 of which were from

Maui. Chair Hannemann and Mr. Nāho'opi'i had accompanied six legislative leaders to Tokyo. These were the Chairs of the Senate Committees on Tourism, Ways & Means, and Higher Education, as well as the majority leader, the presumed next speaker, the vice speaker, and another representative. The Chair praised Mr. Eric Takahata for ensuring that they maximized their opportunities at the Tokyo EXPO, at which 24 Hawai'i businesses had been represented. Mr. Nāho'opi'i had signed a Memorandum of Understanding (MOU) with HIS and JTB to enhance and accelerate travel from Japan.

Chair Hannemann expressed his gratitude to everyone involved, including Dr. Aaron Salā, the new president of HVCB, who had been present. He highlighted that the Hawai'i Tourism Authority (HTA) continued working closely with HVCB and Kilohana.

In sports tourism, Chair Hannemann mentioned that the Los Angeles Clippers were in town and would conduct a major dedication at Ānuenuē Elementary School, the only native Hawaiian public school in the Department of Education. In alignment with destination management and stewardship efforts, several classrooms were to be renovated, and the basketball court was to be resurfaced. The Chair also noted that the Clippers would also play the Golden State Warriors during their visit to Hawai'i. For the first time, a visiting team was to hold clinics on the North Shore. Rep. Quinlan expected that all the young athletes in the area would have the opportunity to attend a clinic with the Golden State Warriors. There was excitement about seeing Steph Curry on the North Shore since such events were usually held in town. Chair Hannemann explained that having held a clinic at the Stan Sheriff Center; the Clippers were now expanding their efforts to reach other parts of O'ahu.

Chair Hannemann referred to a conversation with the Hawai'i Community Foundation to explore potential partnerships for using visitor industry funds. The Foundation had expressed an interest in sports tourism and hoped to collaborate with the Maui County Office of Economic Development, with the enthusiastic support of Mayor Bissen. An exhibition game involving the University of Hawai'i men's and women's basketball teams was to take place on November 2 in Maui, and this was anticipated to be the precursor of a regularly scheduled season game in the future. Chair Hanneman reminded Board members that sports tourism was significant on a national level, and he hoped to see its greater development in Hawai'i.

The Chair expressed his gratitude to all the members of the Board and the HTA staff who had made such events possible.

## **8. Presentation on HTA Destination Stewardship Programs**

Mr. Ka'anā'anā expressed his gratitude to the team for their presentations at the Hawai'i

Tourism Conference, highlighting the Qurator sessions and the Hā'ena panel as excellent examples of collaboration and coordination. He also mentioned Ms. Anderson's work in the organization of the Destination Management Action Plans (DMAPs), which showcased the elevation of destination stewardship to new levels.

The Chief Administrator of Kilohana, Mr. Tyler Gomes, greeted the Board members and provided the updates promised during previous Board meetings. He reminded Board members that 'Umeke is the HTA contract with Kilohana which comprised five different programs; Kahu 'Āina funding natural resource and land-based projects, and Kūkulu Ola focusing on projects tied to native Hawaiian culture. Ho'okipa Malihini Initiative (HMI) targeted native Hawaiian projects in resort areas and was formerly known as the Resort Area Hawaiian Culture Initiative (RAHCI). The contract also included standard Community Enrichment programs and Signature Events appealing to local communities and visitors from national and international markets.

Mr. Gomes informed Board members that he and his staff had attempted to examine the multiplier effect of HTA-provided funding and its translation into direct visitor expenditures. He proposed small marketing assets that might enable legislators and residents to grasp the impact of each investment by the HTA. He cited the following examples:

Merrie Monarch – awarded \$90,000 (smaller than usual) – revenue of \$37.5 million from the U.S. market and \$35 million from the international market in just seven days.

Polynesian Football Hall of Fame – awarded \$155,000 – revenue \$11.5 million in visitor expenditures. Soto Zen Bon Festival – awarded \$10,000 award – revenue \$510,000 in visitor expenditures.

Mr. Gomes mentioned that Kilohana was moving into the next phase of funding. Evaluations for the awards, which had recently closed, would begin soon, with results expected in January. He pointed out that this messaging underscored the value of the HTA and investments in these programs. Mr. Gomes referred to the technical assistance and capacity-building programs known as the Community Tourism Collaboratives (CTCs). He explained that the technical assistance programs comprised foundational technical assistance as well as two separate CTCs as follows:

The community stewardship program focused on community-based organizations hoping to steward areas in their communities directly impacted by visitors. Such programs might seek methods to emulate the program in Hā'ena.

The regenerative experiences program aimed to empower organizations that might not traditionally be part of the visitor industry to create new products for the market. The community stewardship cohort had begun the previous Monday with nine programs, one for each island, targeting areas in the community whose overall impact could be improved with financial support from the HTA. Two workshops had already taken place, and funding was to be

released to the organizations that week, enhancing their capacity up to the end of December.

Mr. Gomes explained that the focus of the regenerative experience's cohort was more product-oriented, with some programs being vertically integrated. He recalled that during a panel discussion at the Tourism Conference, Tea Hawaii & Company and Ancient Leaf Tea had emphasized the importance of tourism development and vertical integration in the sale and marketing of products. Mr. Gomes noted that the 15 cohort members, except for Lānaʻi, had already met in person during two workshops and would follow the same timeline as the previous program, with work to be completed by December 31.

A member of the Kilohana staff collaborated with Solutions Pacific to design and execute these programs. Mr. Gomes stated that 157 organizations had registered with the Qurator quality assurance program. 44 organizations had completed their certification, and other organizations were either still answering questions or undergoing audits to ensure that their ratings reflected the information they had submitted. All the islands were on track to meet the year-one goals. As announced at the Tourism Conference, the three largest Japanese inbound tour operators were now certified. The Qurator panel at the convention was exciting because it encouraged audience members to register their enterprises. Mr. Gomes noted that Mr. Jon Peahl had been responsible for the design and execution of the program.

Though the smallest contractually, Mr. Gomes mentioned that the tour guide certification program would see a subcontract fully executed in the coming week, with a more detailed update expected by the end of October. A vendor with ties to Hawaiʻi specialized in online learning systems. It was hoped to leverage the vendor's expertise and ensure that the end product, an online learning curriculum, would be the property of the State of Hawaiʻi.

Mr. Gomes informed Board members that although Smart Tourism had started as an element of ʻUmeke, it had since become a standalone initiative. During the previous legislative session, Rep. Quinlan had championed a grant of \$3.5 million for the development of the Smart Tourism application. In partnership with Mr. Dan Wacksman of Sassato, Kilohana staff worked on a white paper. They aimed to complete 100 interviews with stakeholders, legislators, application developers, state and county parks, and other government agencies. The white paper would describe the best way to build the application. Interviews will be underway by the end of October, and Board members will be updated in future meetings.

The Visitor Education Post Arrival Marketing (VEPAM) program, directed by Mr. Ito, used a thermometer to assess the program's impact and track key performance indicators (KPIs). All targets were expected to be met and exceeded by the final quarter of the year. The program had initially used pre-existing material from the knowledge bank, but ʻUmeke events were now

being highlighted. Mr. Ito, Mr. Gomes, and Mr. Ka'anā'anā discussed using VEPAM funds to elevate Qurator in the market and thus cross-collaborate multiple funded programs.

At the end of the Tourism Conference, Mr. Gomes conducted a VEPAM session where he played a video created without HTA funds, sharing credit for its purpose. This video received more positive feedback than expected, and Kilohana hoped to secure support from the HTA for similar projects in the future. There was a need for more digital assets in that format.

Mr. Gomes invited questions from Board members.

Vice Chair Paishon asked Mr. Gomes for a report on the Kilohana Conference on the Big Island. Mr. Gomes expressed his gratitude for the HTA and support for the Kilohana convention held two weeks prior in Waikoloa. This had been the largest convention they had ever held, with 2000 registered participants and over 100 breakout sessions. The convention provided an excellent opportunity for an Expo highlighting CTCs and 'Umeke. Mr. Gomes noted that 'Umeke applications were still open at that time. One of the convention panels featured the President of HVCB, Dr. Aaron Salā, the President of the CNHA, Mr. Kūhiō Lewis, and Chair Hannemann in discussing the path forward.

Mr. Miyasato asked whether Kilohana's responsibility was to gather data and set the foundations for the development of the visitor application, with the results to be reported to the Board. Mr. Gomes confirmed that this was the case.

Mr. Miyasato expressed his concern about the proliferation of applications and suggested that it would be better for the State to have a single application. After a year on the Board, he still marveled at the organic nature of the process, but from Mr. Gomes' account, this sounded mature and more than just a proof of concept. Mr. Miyasato acknowledged the difficulty of administering an organization in a quasi-political environment and congratulated Mr. Gomes on his work. Mr. Gomes thanked Mr. Miyasato and expressed his satisfaction with having tangible results to share with the HTA after a year of collaboration. He attributed this success to the support of the Kilohana team, Mr. Ka'anā'anā, and Mr. Nāho'opi'i.

Mr. McCully pointed out that there was no "quasi" element in the political nature of the HTA and suggested that Mr. Miyasato's comment should be struck from the record. Mr. McCully congratulated Mr. Gomes for the economic impact of the Kilohana convention on the Big Island. As the Chair of the Hawai'i Redevelopment Authority, Mr. McCully asked for more details on the economic impact of the Merrie Monarch, noting that the last impact analysis had been a 2018 report from the HTA citing a \$6 million impact. Mr. Gomes responded that the current figure was much higher, being derived from DBEDT source documents provided by Ms.

Chun reported on several parameters. They had aggregated the data in-house and could provide it to Mr. McCully.

Mr. Ka'anā'anā mentioned that an economic impact calculator from DBEDT had been used. Mr. McCully noted that tickets had been sold for about 4,000 seats, which related to direct spending on ticket sales. Another testament to the popularity of the event had been how crowded local restaurants were. Mr. Ka'anā'anā added that Mr. Gomes's figures were self-reported by the Merrie Monarch. The usual practice had been to contract Vision Insights to conduct a community and economic impact survey. This third-party company had a field crew that collected emails and conducted surveys. Mr. Ka'anā'anā believed that such a survey would give a more reliable number, and he hoped to restart it in January 2025.

Asked by Mr. Miyasato how many participants had registered for the HTA Tourism Conference, Mr. Nāho'opi'i responded that there had been more than 600. Mr. Miyasato mentioned the new terminology powered by the HTA. He noted that having people register for and attend an event was a sign of success. He congratulated Kilohana on the number of registrants at their convention.

Mr. Gomes stated that the conference had been capped at 600 participants, and no seats remained. Invitations had been sent out to the complete list of members and every 'Umeke applicant. Everyone who attended had received a "swag bag." Mr. Pfund pointed out that Honolulu had also created a visitor application and asked whether Kilohana already had a vendor to create the application or if they would issue a proposal request (RFP). Mr. Gomes replied that Kilohana's current work was to write a guide for developing the application and that the HTA would oversee the RFP later. Mr. Ka'anā'anā added that the purpose of the white paper being developed by Kilohana was to ensure due diligence. More than 100 partners would be consulted to determine the needs of different stakeholder groups, and this would help formulate the scope for the RFP.

Mr. Gomes stated that Kilohana intended to complete 100 interviews by December 31, and these would include Counties, Parks, and other services. He hoped that this collaboration with other agencies would encourage them to pause the development of their own applications, thus avoiding duplication.

Mr. Ka'anā'anā cited another example of outreach in the partnership with the Department of Transportation at airports. He had contacted the Wayfinding application's manager and their team to develop coordinated efforts.

Dir. Tokioka reminded Board members that Diamond Head and the need for multiple languages, particularly Japanese, had been discussed during the Tourism Conference. He intended to discuss coordination of the upcoming application with a city official who frequently collaborated with DBEDT. Although there were differing expectations for the application, everyone agreed that collaboration would enhance visitors' experiences.

Mr. Takahata, from Hawai'i Tourism Japan, suggested involving VASH in the application, emphasizing its importance for the Japanese market. Chair Hannemann supported this, noting that safety was a major concern for Japanese visitors. Ms. Jessica Lani Rich, President and CEO of the Visitor Aloha Society of Hawai'i (VASH), reminded Board members that VASH assisted visitors in crisis. She had given a presentation during the Tourism Conference about an emergency situation earlier in the year when 250 visitors were quickly and safely evacuated. Assuring the safety of visitors was a paramount concern for the tourism industry. Some years ago, VASH developed a program for the HTA called TravelSmart, containing visitor safety tips and activities to do or avoid. A survey of visitors showed that safety was a major concern.

Ms. Rich expressed the desire of VASH to collaborate on the projected application. They had already written visitor safety cards in various languages for the State Attorney General's office and hoped that this information about visitor safety would be included in the application.

Mr. Gomes responded that VASH was one of the entities that the Kilohana team intended to approach. Mr. Ka'anā'anā pointed out that Mr. Jerry Dolak, the President of the Hawai'i Hotels Visitor Industry Security Association (HHVISA), would contribute to discussing visitor safety.

Mr. Pfund referred to the Department of Agriculture forms and DBEDT information. Mr. Arakawa asked whether the VASH materials had already been implemented. Ms. Rich responded that the visitor safety cards in various languages resulted from a year-long collaboration between VASH, Mr. Dolak, and the State Attorney General's office eight years earlier. VASH had worked with several agencies on visitor safety, but Ms. Lani Rich believed that further elaboration was possible and could include, for instance, issues relating to cruise ships. She pointed out that safety on the trails was also an issue.

Mr. Arakawa suggested that Ms. Rich might provide the Branding Standing Committee with a list of programs and goals to be implemented. Ms. Rich praised Chair Hannemann for starting the visitor public safety committee responsible for keeping visitors safe in Waikīkī. Mr. Arakawa suggested that recommendations from this committee should be sent to the Branding Standing Committee.

Chair Hannemann stated that VASH was a coalition between the HHVISA, WIA, WVID, and

HLTA. VASH held regular meetings and took proactive opportunities to meet with County officials. The coalition was occasionally taken to neighboring islands. Ms. Rich highlighted her 20 years of experience in visitor safety and stressed that visitor and public safety had not featured among the top ten priorities in the past. It became a concern only when there was an emergency. She urged the Board to consider this aspect of tourism and thanked the HTA Board for giving her this opportunity.

Mr. Miyasato mentioned the concept of *kāko’o*, meaning the principle that everyone should have a place in one’s concern.

Chair Hannemann thanked Ms. Rich for explaining VASH’s integration into the HTA system.

Mr. Ka’anā’anā noted that information from VASH and partners was integrated into the content on the *gohawaii.com* website, the visitor-facing portal. Many island visitor bureaus display printed copies of visitor safety information in their lobbies. The partnership between the HTA and VASH was robust, with quick communication in times of need. He continued by noting that the value placed by Hawai’i on visitor safety was important from a branding perspective since it exemplified *aloha*. Hawai’i was one of the few destinations in the world to live with its values. Mr. Ka’anā’anā explained that if the visitor industry was serious about treating people with love and respect, they needed a mechanism for coping with emergencies.

Chair Hannemann mentioned that in the event of a disaster requiring an immediate response, either to move visitors en masse or to organize hotel accommodation, Ms. Rich would call him. Mr. Pfund’s company and hotel organizations had always been supportive. The Chair emphasized that public safety constituted a competitive edge over other destinations and assured Ms. Rich that the HTA would continue working with VASH.

Ms. Rich responded that Hawai’i had an international reputation for caring for visitors during emergencies. She noted that Ireland was the only other country with a program like VASH and recounted that for the past 18 years, she had been a member of Travelers Aid International, dealing with the traveling public’s problems. She thanked the HTA for their support in taking care of visitors.

Mr. Ka’anā’anā informed Board members that the budget for VASH across the State was about \$650,000 per year. Chair Hannemann added that friends at Inoa had also assisted with shuttles to transport visitors in danger. Ms. Rich shared an example of Charlie’s Taxi assisting at 3:30 a.m. during a barricade situation in Waikīkī at the end of January.



Chair Hannemann thanked Ms. Rich and the HTA staff again. He encouraged Board members to attend Kilohana events to demonstrate to the public the close collaboration between the HTA and Kilohana. He requested members to inform Mr. Gomes about upcoming events and participate in them.

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

A detailed account of market insights was submitted to the Board members in their information packets, and Ms. Chun reviewed the highlights of this data. DBEDT issued provisional visitor statistics for August on Monday, September 30, showing that visitor arrivals and expenditures were slightly higher than those for August 2023. Expenditures for the U.S. market were higher for 2024, and expenditure per person per day was also higher. There were more arrivals in August, and the average daily census was higher. On an island-by-island basis, both O'ahu and Maui had increased numbers of visitors, with the Per Person Per Day Spending (PPPPD) spending significantly higher on O'ahu and the average daily census higher on Maui.

Hawai'i airports were busy during August, and the load factors for domestic flights were higher in August 2024 than in August 2023. However, the load factor for international flights for August 2024 was lower than that of 2023.

Hotel occupancy for August 2024 was lower than that of August 2023. Annual daily rates (ADR) and revenue per available room (RevPAR) were lower. There was a similar trend for occupancy of vacation rentals, although their ADR was slightly higher, according to the reports issued during the previous week by DBEDT.

State transient accommodations tax (TAT) for August 2024 was \$74.9 million. However, the total TAT collection for July and August 2024 was \$149.1 million, a reduction of 4.3% compared with July/August 2023. The year-to-date (YTD) TAT total for FY25 was \$9.1 million, less than July/August 2023. Ms. Chun noted that this was State TAT.

She presented a slide showing estimated County TAT for the various Counties as of March 2024, but no updates were available for subsequent months. Ms. Chun noted that scheduled nonstop air seats to Hawai'i, excluding charter seats, had been slightly higher overall in August and September. The number was expected to continue to be higher in October and November.

DBEDT published its tourism forecast after the last Board meeting on September 6, 2024. The report showed that recovery and expenditure were expected to reach 2019 by 2027. Economists also predicted that the forecast for the present and following years would continue to be softer.

Ms. Chun explained that a declining trend for the next few years was expected for the U.S.

West and East markets, whereas Japan was expected to rise, Canada to rise slightly, and Europe, Korea, and Oceania to remain flat. Regarding visitor spending, the trend for U.S. visitors to spend more per person per day was expected to continue. Overall spending trends for visitors from the U.S. West were expected to increase slightly. For other markets, spending for Japan and Canada was expected to increase, while spending for Europe and Oceania was expected to remain flat.

Ms. Chun stated that the air-seat booking pace was lagging for all periods up to February 2025. The fall U.S. market was behind the overall trend, although the pace for Japan was expected to improve at the beginning of the new year. The Canada market pace was encouraging for November but expected to soften in the first quarter of 2025. Korea was ahead of pace in January and February 2025, while Australia was lagging behind. The China market was affected by air service issues, and only 46 visitors from China were booked for January. Comparing islands, O'ahu was soft but was expected to improve towards the festive season. Maui was still lagging, and Kaua'i was doing better than Maui. Hawai'i Island was expected to improve in January and February 2025. Recalling a discussion with an official from the Pacific Missile Range Facility (PMRF) at the Tourism Conference the previous day, Ms. Iona asked Ms. Chun how military visitors were tracked.

Ms. Chun responded that military personnel were included as visitors. Anyone staying in Hawai'i for less than a year was defined as a visitor, and information forms included a segment for the military. However, military personnel stationed in Hawai'i would be counted as intended residents. Military contractors might stay for three months but would be counted as visitors, the purpose of whose trip was not leisure.

Ms. Iona asked whether military personnel would be identified as government officials, as was formerly the case with hotels.

Mr. Nāho'opi'i responded that one of the definitions of "purpose of visit" was "military." He pointed out that the only military personnel omitted from visitor statistics were those who arrived on military flights since the State was not permitted to track these flights or record the number of people on them. The military public relations staff might give numbers for a special event, but military transit flights were not subject to surveys. Ms. Iona commented that many military arrived by ship.

Ms. Chun repeated that tracking military transport was not permitted, but many military personnel arrived on commercial flights, and they would be tracked. A military contractor would be likely to arrive on a commercial flight.

Mr. Miyasato stated that he usually looked forward to Ms. Chun's presentations. Given that TAT was paid into the State's coffers, Mr. Miyasato asked whether this was the right barometer to compare year-over-year activity. He pointed out that military personnel stationed in Hawai'i

were given 30 days in a hotel. He presumed that TAT would be paid as part of that stay but was unsure whether it was an appropriate barometer to measure State revenue from tourism.

Ms. Chun responded that TAT was an easily accessible measure because it was reported monthly by the Department of Taxation. Most visitors stayed in hotels, condo hotels, and timeshares that reported their TAT, so it was a good indicator, even though vacation rentals were more complicated. Mr. Miyasato replied that the State of Hawai'i defined TAT as the barometer of tourism health.

Ms. Chun reminded Board members that the HTA website included an economic impact fact sheet that her team compiled monthly. This sheet demonstrated the benefits of the Hawai'i tourism economy, giving a synopsis of events for that month and the events for the previous eight months. The fact sheet showed total visitor spending and State tax revenue from direct and indirect sources.

Mr. Miyasato requested that in her next report, Ms. Chun isolate the slide for that particular month to view the connection between TAT and tourism's economic impact. He referred to the slide showing that TAT was 4% lower than the previous year.

Ms. Chun responded that this figure was not for August because spending and visitor arrivals were higher during August 2024. Mr. Miyasato asked whether tourism was measured by room nights or air seats. However, it seemed that TAT was the basis. Ms. Chun explained that the 4.3% reduction in TAT during the month of August referred to the amount collected during July since TAT was collected in respect of the previous month.

Mr. Nāho'opi'i stated that TAT was a good indicator at present because lodging expense as a portion of total visitor expenditures was dominant at the moment. But in the past, the hope was that this situation could be reinstated, and shopping and other activities could also be added to TAT as revenue. These activities generated general excise tax (GET). Both TAT and GET had to be reported as part of visitor expenditure and induced and indirect revenues. Ms. Chun responded that GET attributed to tourism was not reported monthly by the Department of Taxation.

Mr. Miyasato recalled that a year ago, there was doom and gloom for tourism, and he asked about the fiscal impact of the previous year's events. He believed measuring the dollar connection between events and visitors was important. Ms. Chun noted that the distribution of TAT was shown on the fact sheet published by DBEDT. Before the pandemic, TAT had been distributed to various counties, but now, almost all of the TAT was paid into the General Fund. She added that this discussion

related to some of the comments by the global marketing teams (GMTs) the previous day. An increase in multi-island visits would immediately increase PPPPD spending because of the higher inter-island flight portion. Mr. Miyasato pointed out that there was no up-to-date information about the 3% collected by the counties. Ms. Chun had tried to obtain this information and had been told to ask the Department of Taxation. Ms. Chun responded that the reporting was on a lag, with the latest report for March 2024 and no subsequent updates.

Chair Hannemann stated that he would like Ms. Chun's staff to break down the percentage distributed to the Counties and find out how it was used. He believed that it was important for the Counties to show how they were using their 3% TAT about tourism. He had observed that the TAT was under siege yearly, so it was important to know how the Counties used their portion. Ms. Chun responded that she would need assistance to answer that question because the Counties were reluctant to release the data.

Dir. Tokioka thanked Ms. Chun and suggested working with hotels to obtain more information. When TAT on neighbor islands started, there was a concern that many large hotels would pay Honolulu directly. Ms. Chun stated that she understood that the State Department of Taxation informed the Counties how much they should be collecting, but it was unclear whether that was what they collected. It was possible for hotels to tell the Counties that money was being paid directly to O'ahu.

Dir. Tokioka replied that DBEDT would work with the Counties and the Department of Taxation to create a formula ensuring the Counties would be paid their fair share. He promised to coordinate with Ms. Chun, the Director of Taxation, and the County tax offices. However, it was important to determine whether the payment had been properly processed. For instance, there were Marriott hotels on all the neighbor islands. Ms. Chun suggested asking the former tax director, Mr. Choy, about this situation and how to be sure that the tax base and the liability were allocated to the right County. Mr. Choy responded that the business address was recorded on the taxation information form.

Dir. Tokioka commented that the situation was more complex than it appeared, and even the Department of Taxation had the same opinion. An address form might be correctly completed, but the implementation was different.

Mr. McCully requested a brief recess.

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

Chair Hannemann called the meeting to order and introduced the next agenda item, reports from global marketing teams (GMTs).

Mr. Nāho‘opi‘i spoke about brand marketing strategies and plans for the 2025 calendar year (CY25), emphasizing the mission to keep the Hawaiian Islands globally competitive while honoring their unique culture, environment, and community. He explained that these elements were integral to the plans, which had been developed through a process involving the Branding Standing Committee since the beginning of the year. The plans were informed by research studies, polls of industry stakeholders, studies commissioned by DBEDT, and the HTA’s own surveys of advertising effectiveness and resident sentiment. He explained that the focus was on a five-year plan, with the first year concentrating on the market and the following years solidifying destination management and stewardship plans driven by each island. The aim was for Hawai‘i to become known as a model for regenerative tourism, in which there would be a change in the type of products available and their interaction with visitors. Mr. Nāho‘opi‘i remarked that brand marketing plans would focus on recovering domestic markets (U.S. and Canada) and rebuilding internationally, emphasizing revitalizing higher-spending international markets while stabilizing domestic visitors, especially for Maui. The goal was not only to attract travelers to Hawai‘i but also to ensure that they had an enriching experience and formed a deeper connection with the islands. These points formed the major guidelines given to the GMTs.

Mr. Nāho‘opi‘i reminded Board members that Hawaii’s people, place, and culture were paramount, with the campaign strategy centered around the people, the place, and the Hawaiian Islands, ensuring that the people and their story were foremost. The sustainable destination aspect emphasized protecting natural resources and encouraging activities that would enhance rather than harm the place. Research presented at the Tourism Conference made clear that visitors were drawn to Hawai‘i for its scenic beauty, which promoted relaxation and helped them recover from their usual hectic daily life. These aspects were key brand attributes that were reflected in marketing strategies. Previous research on campaign effectiveness indicated that showcasing new attractions and experiences increased the likelihood of visiting. There have been many changes in international markets since the pandemic, so the initial task was to raise awareness about Hawai‘i and its new offerings, including businesses, attractions, activities, and tours. With many new travel agents in the market, education for the travel trade was also crucial.

Mr. Nāho‘opi‘i stressed the importance of creating opportunities for visitors to add value to the place by participating in volunteering and “giving back” activities. This regenerative tourism component would enhance resident and visitor interaction. The ultimate stakeholders of a state agency were the residents, and their well-being and way of life must be ensured. Marketing strategies would utilize paid and earned media channels, focusing on digital and social content for efficiency and cost-effectiveness. The goal was to attract new first-time visitors, particularly

younger ones who primarily operated in the digital space.

Mr. Nāho'opi'i remarked that social media had evolved with new methods, and leveraging local voices and stories was essential for creating authentic experiences and trust in marketing. Key opinion leaders would be vetted to ensure their value systems aligned with Hawaiian values, avoiding merely going for numbers. Guiding objectives for CY25 aim to ensure brand awareness for all islands, each with its unique values and attributes, adapting each market accordingly. GMTs had gathered feedback about different islands and activities, continuing to use research from DBEDT and Global Support Services (GSS) contracts for data-driven insights and decisions. The mindful traveler was to be targeted using a precise approach to advertising and media areas. Given the expense of Hawai'i vacations, targeting travelers who could afford to participate in activities was essential, even though targeted marketing was more costly. Multi-island experiences would distribute wealth and visitor income across all communities. Tour operators would need to develop strategies to highlight multiple island and multi-island experiences.

Mr. Nāho'opi'i reviewed brand marketing plans containing targets for KPIs for 2025 based on DBEDT forecasts and economic factors, focusing on visitor expenditure rather than the number of visitors. Expenditure could be derived from lodging, shopping, or other activities across several islands, focusing on PPPPD dollar value. The board members' information pack contained details of the qualitative goals for the GMTs. These goals had been derived from syndicated survey data on visitor satisfaction and activities. Mr. Nāho'opi'i cited examples of these goals, such as ensuring safe and responsible travel before arrival, which would reinforce the reputation of Hawai'i as a safe destination. Other goals to be evaluated included care and respect for the Hawaiian culture, people, and environment, patronization of local shops, and purchase of locally produced goods. The GMTs had been asked to feature Made in Hawai'i products and partner amenities on their websites.

Mr. Nāho'opi'i explained that the evaluation of goals involved measuring the increased likelihood of visiting Hawai'i, which began with generating interest followed by supplying data to encourage conversion from interest to bookings. While the conversion involved industry partners, it depended much on price and value offerings. GMTs worked closely with travel partners and operators to create deals leading to final bookings, though they were not accountable down to the last level. The HTA was responsible for tracking the final results.

Mr. Nāho'opi'i noted that measurement of the output of the GMTs included monthly reporting of program and activity tracking with quarterly targets. Measures that were lower than expected would be reviewed by management to address issues and work on improvements during subsequent periods. Consumer-paid media, travel trade media, public relations activities, and consumer shows would be assessed. Made in Hawai'i products, agritourism,

festivals, and events were to be featured when working with travel trade, on websites, or in advertising.

Mr. Nāho'opi'i explained that they were working on calendar year 2025 (CY25) for marketing purposes, while budgeting was based on FY25. Calendar contracts assumed that the second half of CY25 would be funded through the projected budget, thus impacting FY26 funding. Eventual budget changes would necessitate renegotiation of contracts and KPIs. CY25 was used because the visitor industry operated on a calendar basis.

a. Meet Hawai'i - Kalani and Daniel

Mr. Nāho'opi'i introduced Meet Hawai'i, the marketing team for meetings, conventions, and incentives. He also noted that all the presentations of the GMTs had been given in detail over the previous two days. The presentations for the present Board meeting will be shortened to highlight the most important sections. Details of marketing strategies and opportunities will be posted on the HTA website.

Ms. Lynn Whitehead, Vice President of MCI Global Sales and Marketing, greeted the Board members and mentioned how much she appreciated being present with them in person. She thanked everyone for their support as she entered her new position, especially the General Manager of the HCC, Ms. Orton.

Ms. Whitehead had found a home on the Branding Standing Committee and was working on the most acceptable reporting methods. She commented that Mr. Andrew Koh and Ms. Orton would assist her in the presentation. Ms. Whitehead reminded Board members that Meet Hawai'i was a collaboration between the HCC and the HVCB. Its purpose was to highlight the islands as a premier destination for meetings, conventions, and incentive business. Meet Hawai'i was overseen by the HTA and aimed to align with the four pillars of the HTA: Natural Resources, Hawaiian Culture, Community and Brand Marketing.

Meet Hawai'i had been fully staffed as of June 30, 2024, and the team looked forward to a strong year. Sales were behind pace entering the fourth quarter, but Ms. Whitehead expected an increase before the end of the year. The City-wide team was working to close seven definite verbal responses, and the single-property team was preparing for IMEX, a major platform to increase leads and close business. The Asia/Oceania team thanked everyone for their partnership and support in developing the memorandum of understanding (MOU) that Mr. Koh and Mr. Hachiya had developed with JTB. Global momentum in the MCI market space was expected to grow from \$870 billion to \$1.5 trillion by 2030, with a 9.1% compound annual growth rate. Incentive meetings were expected to be the fastest-growing segment from 2023 to 2028.

A recent DBEDT MCI report showed that visitor spending increased by \$233 million from 2023 to 2024, a 28.8% year-on-year increase. However, slower growth was expected for 2025–2026, with many hotels offering increased incentives to close deals. The single property booking cycle remained under two years, usually around 18 months, focusing on incentive and corporate meetings for all islands. Hotel chains were expected to see the strongest demand for new business, with meeting planners protecting their contract liability. For example, the 2025 International Chemical Congress of Pacific Basin Societies (Pacifichem 2025) was expected to bring 15,000 attendees, but meeting planners did not contract the usual blocks of rooms. Ms. Whitehead hoped to discuss with Ms. Chun and Mr. Eslinger how to evaluate the business brought by such conferences. She emphasized that the Meet Hawai‘i team always mentioned Maui and ensured that meeting planners knew that Maui was open and heading toward recovery.

Regarding City-wide business, Ms. Orton had an exceptional year at the HCC. The building was to be refreshed, and the roof repairs would be completed by 2027. The Marriott Hotel and the Hawaiian Village were also undergoing extensive renovations. This highlighted the substantial momentum for City-wide business in Hawai‘i. The Meet Hawai‘i and Convention Center teams were looking forward to the completion of renovations in 2027.

Ms. Whitehead mentioned that the short-term booking cycle was strong and on pace for 2027, with the Convention Center scheduled to be closed in 2026. Bookings were on pace for 2027–2029, short-term bookings were expanding, and more opportunities were anticipated. Competitiveness and future opportunities were deemed important. Almost all MCI groups at the Convention Center were committed to the carbon offset program. The client services department has been enhanced to enable clients to choose the “give-back” program that best aligns with their mission statement and the island where they stayed. The team was tracking these ventures and hoped the positive environmental impact would continue to increase. While City-wide clients were fully involved in returning value to Hawai‘i, Ms. Whitehead believed that single-property businesses could do more, considering the impact of MCI across all islands.

Ms. Whitehead remarked that the 15% increase in the value of the Yen over the past three months had resulted in Asia/Oceania MCI experiencing a greater recovery than the leisure business. The Japanese travel organizations JTB and HIS considered Hawai‘i the most important group destination for 2025. HIS was in its second year of an MOU with the HTA, while for JTB, this was a new initiative. Ms. Whitehead expressed her appreciation for Mr. Koh’s and his team’s achievements in attracting more business. Korea faced challenges due to a reduction in air seats. Mr. Phadunshiato did an excellent job representing the Oceania team. He intended to publicize the new Qantas three times weekly direct service from Melbourne to Honolulu



starting in May 2025. For Chinese groups, visa issues remained a problem. Ms. Whitehead noted that, in general, cash incentives were becoming more common.

Target market segments included the U.S., Japan, Canada, Oceania, and Korea. Staff had been deployed on the mainland and in Europe for single-property and City-wide sales. Despite limited investment in these markets, they were working with the GMTs to maximize available funds. Key brand highlights for meetings included global accessibility and increased attendance, noting that many events hosted at the HCC doubled their attendance.

Ms. Whitehead and Ms. Orton had been meeting weekly to develop strategies to ensure the right market mix of corporate, sports, and association events. They were working to develop more clarity around the sports market. Ms. Whitehead mentioned that hiring a full-time corporate salesperson had maximized corporate sales. Single-property sellers had been assigned to each island, meeting regularly with partners to develop aligned strategies. Participation in key programs for the city-wide and single-property markets was maximized within the available budget, focusing on direct sales and education. Post-pandemic, many clients had relocated from DC and Maryland to Florida, optimizing sales exposure with virtual platforms.

Mr. Koh and his team enabled Asia/Oceania's key programs to achieve all necessary coverage. Ms. Whitehead remarked that the redesigned Meet Hawai'i website, launched in March, featured updated content and intuitive navigation, with more microsite tools being developed for client services. She reminded Board members that City-wide client services support was vital to provide immediate resources and convert first-time clients into repeat businesses. Once clients had signed their contract, they required guidance to connect with off-site venues, transportation companies, and destination management companies, and the client services department provided this. With sales teams fully staffed, the focus shifted to client services to ensure proper servicing after booking, thus encouraging return business.

Ms. Whitehead remarked that partnership opportunities were listed on the HTA website, with ongoing efforts to enhance communications with the community. She emphasized that LinkedIn was a vital resource for meeting planners both globally and domestically. Ms. Whitehead informed Board members that the Meet Hawai'i team was to participate in IMEX the following week. She understood that the rebuilt exhibition booth had necessitated significant financial input, but it was essential for attracting meetings with high-level clients. Meet Hawai'i needed proper representation, and IMEX provided opportunities that placed Hawai'i in front of key media and clients. The venue also provided education and a forum for meeting planners. With 38 partners, there was substantial global interest. The HTA aimed to reintroduce strategic partnerships using funds gained from the Maui fires, ensuring consistent

messaging in this key market segment. Annual participation in these strategic partnerships would enable Hawai'i to compete effectively, increase buying power, and enhance messaging.

Mr. Miyasato thanked Ms. Whitehead for her excellent presentation. He believed that once the TAT and GET collected by the State of Hawai'i were assessed, it would not be difficult to make up a shortfall of 4%. He noted that creating more opportunities for MCI could effectively diversify tourism. Ms. Whitehead thanked the HTA Board members and staff for their support.

b. Hawai'i Tourism USA - Jay Talwar

The Chief Marketing Officer of HVCB, Mr. Jay Talwar, presented the 2025 plan for leisure travel, pointing out that he had already shared this plan several times. He remarked that he had enjoyed the HTA Tourism Conference the previous day, and the sold-out attendance had been rewarding. He also enjoyed sharing his plans for 2025. He informed the Board members that he would abridge some details and break down the plan according to categories.

Current market situation:

The growth in GDP across the USA in 2024 was projected to continue into the following year, albeit at a lower rate. The U.S. marketing segment remained crucial to the State of Hawai'i, with these considerations deeply integrated into program development. Lift was stable from the U.S. to the State, although there had been a reduction in direct flights from West Coast markets to neighbor islands. The trend was shifting toward initial arrivals at O'ahu followed by connections to neighbor islands. Maui and West Maui, in particular, was still lagging behind the booking pace and would continue to require assistance. Year-to-date statistics for visitor arrivals, visitor expenditure, and PPPPD spending showed solid growth through August, with U.S. visitors spending approximately \$246 daily. However, the overall result was softened by the reduction in visitor numbers. The share of visitors from the U.S. to the State, which increased during the pandemic, had decreased slightly but remained significantly higher than previous levels. An island-by-island breakdown revealed that international visitors comprised 75% of the O'ahu market, while Kaua'i was almost 95% international. Both Maui and the island of Hawai'i were about 90% international. The overall share of international visitors to the State was 84%. However, U.S. visitors remained significant contributors to tourism.

The GDP growth forecast 2024 showed a slight slowdown for 2025, though precise accuracy was challenging. Island-by-island air-seat availability showed a reduction for Maui, while Kaua'i had experienced growth in absolute numbers but was now slowing compared to 2022. Mr. Talwar explained that 2022 was a baseline because it reflected pre-wildfire conditions. He added that Mr. Esslinger considered air-seat bookings from January to April as movable assets, with bookings on the books subject to change based on demand. Room nights booked in hotel rooms globally, not just from the U.S., showed that November was soft but improved by

December. However, Maui continued to experience reductions, with West Maui's forward bookings performing poorly based on available data sources.

#### Target Audience:

Mr. Talwar quoted a frequent saying of Mr. Nāho'opi'i that the marketing team was in the dreaming phase, with the industry in the conversion phase and the travel pace team in the middle. However, this had now become a grey area. Hotel and airline marketing teams would send visitors emails about the destination, initiating the dreaming phase, but conversion remained critical and highly dependent on pricing. It was important for industry partners to ensure that their emails aligned with the branding set by the HTA team. Marketing teams studied the visitor profile and journey, placing the resident population at the center, with the host benefiting the most from tourism. Mr. Talwar reminded Board members that residents could not be separated from the visitor industry since hotels, tour agencies, and airlines employed many residents. It was important to envisage the State as a single community with unified long-term visions and goals for its families and local communities rather than as a collection of separate communities.

Marketing teams had to ask who they were inviting and what type of traveler was needed. Mr. Talwar remarked that it was important to attract the type of traveler who could benefit the visitor industry and could provide tax dollars for the government to use for community services. It was also important to attract travelers who sought personal enrichment by respecting cultures and learning from them while safeguarding the environment. Activation strategies have been developed for target audiences such as travelers from Los Angeles. However, Hawai'i's share of Los Angeles travelers was dropping. Alternative destinations such as Portugal, Spain, London, Paris, and Tuscany are drawing interest, not necessarily because of their natural beauty but because of their engaging cultures.

Messaging – the people, the place, the Hawaiian Islands

#### Social Media:

Mr. Talwar explained that social media evolved quickly and frequently, necessitating constant study by the team. Given the content-heavy nature of platforms, there was a continuous need for posts and pictures. Positioning and assets were required. The team had recently completed a knowledge bank shoot, providing new assets aligned with the messaging. They monitored the performance of posts on each platform on an ongoing basis, working with agency partners to identify the most effective material and adjusting content accordingly. Chef Kyle from Maui had been one of the most popular digital contributors since cuisine was a significant motivator for travelers, similar to travel motivations for Portugal, Spain, France, and Italy. The HTA had provided much-appreciated support for the Hawai'i Food and Wine Festival, which aligned with

the agriculture industry. Many products used by chefs were unique to Hawai'i, benefiting agriculture, chefs, and smaller businesses.

Mr. Talwar reminded Board members that ensuring visitors had fun was crucial. The previous head of Brand Marketing for the HTA, who had been very analytical, balanced his approach with a sign on his wall that read, "It's a vacation, stupid!" While helping communities was essential, it was vital to remember that visitors were on vacation. They needed to ensure that people were shown acting appropriately in the destination while still having fun.

#### Branded Content:

Mr. Talwar remarked that this referred to collaboration with partners who would attract the target audience to their editorial content, aligning their content with the desired strategy for the destination. A target audience member would assume on viewing the content that it was editorial, but it would be based on the Hawai'i market strategy.

#### Public Relations:

Mr. Talwar noted that the public relations team had worked very effectively during the current year and had developed a database of the top 100 media platforms with which they intended to collaborate, not just through the Honolulu office but also through offices and island visitor bureaux across the State. The PR department tracked the platforms with which they met, the content that had been pitched, and which items had finally been published. Keeping records in this way would ensure effective coordination. Cooperation and coordination with industry partners were becoming increasingly important, enabling assistance with hotel rooms, attractions, activities, and flights to the destination. Mr. Talwar commented that the media was becoming ever more dispersed, especially where MCI was concerned, and reaching out through webinars and virtual tools facilitated the aggregation of efforts and improved coverage aimed at destination bookings.

#### Travel Trade:

Mr. Talwar reminded Board members that the primary concern was the education of additional travel agents, which effectively increased the size of the Hawai'i sales team. He pointed out that as the destination and its competitors evolved, methods of attracting visitors must also evolve; otherwise, the markets would move on without Hawai'i. Mr. Talwar mentioned that Marriott hotels had hosted many travel trade events in Los Angeles that were oversubscribed, such as the hunger for knowledge on the part of travel agents. He commented it was important to expand the message for the travel trade and other partners and ensure that digital assets were up to date, on-strategy, and on-message.

Mr. Talwar recalled that the recent Tourism Conference had promoted many partnership opportunities, resulting in ten pages of different opportunities from island visitor bureau and the U.S. team. He thanked the Board members for their time and support.

Mr. Miyasato congratulated Mr. Talwar and his team. He recalled that the concept had been more of admonition than invitation during the previous year. He believed that there had been an effective progression in a Kākou and pono way from the events in Maui. An appropriate time for grieving was allowed before moving into the invitation to visit, rejuvenate, and have fun. Mr. Miyasato had often said that travel was about transformation, and he believed that transformation could occur while having fun. He congratulated the marketing team on the new message, “The people, the place, the Hawaiian Islands.” He added that starting with people implied a relationship, and this would encourage the kind of visitor who would appreciate all aspects of Hawai‘i. Mr. Talwar repeated the invitation, “Come with an open mind and an open heart,” and commented that the campaign had been created based on input from many people. He thanked everyone who had been part of the development process. Chair Hannemann thanked Mr. Talwar for holding regular meetings with stakeholders to obtain input.

c. Hawai‘i Tourism Japan - Eric Takahata

The Managing Director of Hawai‘i Tourism Japan, Mr. Eric Takahata, gave a presentation that began with his appreciation for the presence of all the international marketing teams at the meeting. Mr. Takahata commented that questions often arose about when the tourism market would return to 2019 levels. While this remained the ultimate goal, it was clear that it would not happen immediately. The recovery from international travel was slower than that of the domestic market. The trend for the Japan market was positive, with the State needing to understand this trajectory. As of June 2024, overall travel from Japan had recovered to 61% of 2019, while travel to Hawai‘i was at 44% of 2019. Despite this, per-person per-day spending was almost at the 2019 level. In 2019, the Yen had stood at 109 per dollar, but it has since depreciated to 146 Yen per dollar, reducing spending power by 25%. The average daily rate (ADR) for the State was about \$380, up 30% from 2019, with increased hotel and food costs and inflation hindering the quick recovery of the Japanese market.

Mr. Takahata believed that the Japanese economy was recovering well. Chair Hannemann had attended a private economic meeting with one of the Japanese government’s top economic advisors, who indicated that the Japanese economy was doing well. Hawai‘i should be excited about the emerging affluent middle class in Japan. The value of the Yen was a hindrance. Still, efforts by the U.S. Federal Reserve to cut rates and the Bank of Japan to raise rates should help achieve parity between the dollar and Yen, giving Japanese consumers more buying power when visiting Hawai‘i. Year-over-year trends were moving in the right direction, aligning with forecasts from the State through DBEDT, the Japanese travel industry, and airlift trends. The World Tourism Organization, part of the United Nations Organization, projected that global international travel would reach 2019 levels by 2026 to 2027. Stakeholders such as airlines,

travel wholesalers, online travel agencies, suppliers and consumers had informed the members of the legislative mission to Japan that emerging trends indicated a shift towards more eco-friendly products. This trend aligned with the regenerative model adopted by Hawai'i, which was becoming a global model.

Mr. Takahata referred to the expanding digital markets mentioned by Mr. Talwar and pointed out that updated content was always necessary. Mr. Takahata reminded Board members that media were shifting towards digital platforms, with numerous platforms in Japan and Asia. He noted that the situation in Korea and China was different. The team needed to be present on every possible digital platform. Mr. Takahata noted that short-distance and domestic travel were recovering fastest, driven by economic factors and environmental concerns. Local competitors like South Korea and long-haul destinations like Australia were recovering quickly in the Japanese market, the driving force being the similar values of their currencies and lower ADRs. For instance, ADRs in Australia and Singapore were \$100 lower than those in Hawai'i. Air seats had recovered to about 70% of pre-pandemic levels, with premium, economy, and business class at 90% load. Airlines were adjusting schedules accordingly, with seat supply realignment and readjustment in Japan. Mr. Takahata pointed out that the positive trend for arrivals in the following year might result in more changes in airline schedules. The seat supply for 2025 was expected to reach about 75% of pre-pandemic levels.

Mr. Takahata reminded Board members that while destinations such as Australia and Singapore was attractive to the Japan market, and domestic travel within Japan was a significant competitor, with an influx of inbound travel greater than 2019 levels. All the Prefectures in Japan emphasized their domestic product, making it compelling for residents to travel within the country. Okinawa was a major competitor to Hawai'i, with significant investments in infrastructure and major hotels. The task for the Japan team for 2025 was to address these challenges by attracting travelers who could afford the cost of Hawai'i as well as offering more value through hotels and airlines. Geographic targets included all direct service airports, followed by secondary airports, either to restore service or improve connectivity. Mr. Takahata explained that the target audiences for the Japan market included first-timers, couples, and three-generation families, now referred to as power families. This segment saw younger couples with one or two children investing more resources into their children's experiences. Millennials were also a key group for the Japan market.

The consumer strategy aimed to convey that Hawai'i was not out of reach or overly expensive, highlighting unique activities and experiences. Mr. Takahata commented that messaging would center on cultural and ethical historical experiences to attract younger values while maintaining the core and repeater market. The intention was also to strengthen island-specific branding, and it would be crucial for visits to expand beyond O'ahu, which was currently the location of

90% of Japanese visitors. Mr. Takahata also noted that more multi-island trips would increase PPPPD expenditure. The travel trade continued to work with industry suppliers and airlines, focusing on cooperative deals that would drive bookings. Public relations efforts were similar to those in other markets, enhancing media outreach with targeted media, influencers, and freelancers.

Mr. Takahata commented that immigration restrictions on the Japanese film industry had presented a challenge that Gov. Green had referred to the White House. It was hoped that the U.S. Customs and Border Protection agency would facilitate entry to film in Hawai'i for Japanese celebrities and film crews, providing free publicity. Moving forward, the intention was to refocus on the island distribution plan.

Mr. Takahata reminded Board members that the Japan campaign is continuing on the recovery path with more aggressive messaging, pivoting away from post-pandemic mālama messages. He noted that recovery cooperatives supported the promotional efforts of selected airlines, wholesalers, online travel agents, and credit card companies. The Beautiful Hawai'i branding message aimed to focus on each island individually, making the messaging more comprehensive to include neighbor islands. Digital marketing initiatives remained unchanged, ensuring presence on every available platform. Partnership opportunities were emphasized, with 99% of stakeholders tied to HTJ offices.

Mr. Takahata highlighted the importance of VASH for the Japanese market, as Hawai'i was marketed as a very safe place. He encouraged international marketers to meet Ms. Rich, noting that safety was of utmost concern for international marketing. Mr. Miyasato congratulated Mr. Takahata on his increasingly mature presentation. Mr. Miyasato raised the issue of passport possession and reported that a mere 16% of Japanese had passports. He had participated in recent discussions about how to make passport acquisition appealing and how it could be linked to Hawai'i travel. Mr. Miyasato stated that outbound travel from Japan outpaced inbound travel to Hawai'i, affecting load factors. Hawaiian Airlines attendants anecdotally mentioned flights to Japan resembling Vegas flights due to the number of local passengers. The Japanese economy was acknowledged to be booming, and Mr. Miyasato appreciated the additional \$2.5 million budget would enable the HTJ campaigns to continue.

Mr. Takahata thanked Mr. Miyasato for his favorable comments. Before the pandemic, passport possession in Japan had been 23%, but some people did not renew their passports afterward. He had already discussed passport possession with the Japan Association of Travel Agencies (JATA), the Ministry of Tourism agency. They considered the idea that the government would pay for or subsidize the passport on coming of age. Such ventures could incentivize Hawai'i as the first international destination.

Mr. Pfund noted that historically, many Japanese visitors to Hawai'i came from the wholesale package side, but this has now become negligible. At present, visitors appear to be more affluent. He asked whether the marketing plan would begin to target direct bookings. Mr. Takahata responded that Japanese travelers were increasingly making direct bookings, with Expedia being the largest supplier for Japanese visitors to Hawai'i in 2023 and 2024. However, online travel agencies did not offer the additional services provided by traditional tour wholesalers like JTB and HIS, such as a more comprehensive product to Hawai'i and local support. Traditional travel agencies had a physical presence in Hawai'i and provided a local phone number that visitors could call to contact local staff. Currently, the market mix is about 60% independent travelers and 40% package deals, with affluent visitors appreciating the extra care traditional tour companies provide.

Mr. Pfund noted that Japanese wholesalers were successfully regenerating the group business. Mr. Takahata confirmed that corporate and incentive travel were recovering well, with large travel agents like JTB and HIS organizing group travel. Meet Hawai'i had a successful MOU signing with JTB. Dir. Tokioka commented that he had spent two weeks with Mr. Takahata and his team over the past six months. He praised them for their efforts and noted that they were well-respected and well-known in Japan. He asked whether they had appropriate messaging to market Hawai'i in Japan.

Mr. Takahata thanked Dir. Tokioka for his comments and emphasized that everyone in HTJ was passionate about Hawai'i. His team members were often sought out to advise other organizations. Dir. Tokioka responded that whenever Governor Green had meetings in Japan, he was very well received. Dir. Tokioka believed that Hawai'i was fortunate in their Japan marketing team. Mr. Miyasato praised Mr. Takahata and Ms. Rich for their work. Mr. Arakawa mentioned that Mr. Takahata always used his skills and connections to provide valuable insights on attracting Japanese visitors to local signature events. Chair Hannemann stated that he had assigned Mr. Takahata a special task for March 23, 2025, involving the Dodgers and Cubs playing the first major-league baseball game in Japan to start the season.

#### d. Hawai'i Tourism Canada - Colin

The General Manager of Hawai'i Tourism Canada, Ms. Susan Webb, introduced Mr. Colin Wood, Hawai'i Tourism Canada Account Director. Mr. Wood informed the Board members that he would give an abbreviated version of the material presented on the previous day. He commented that the Canada team was passionate about this incredible destination.

Regarding the market situation in Canada, Mr. Wood stated that consumer confidence was slowly improving but was not yet back to normal. The unemployment rate was high, although



interest rates had fallen. Mr. Wood noted that the Canadian economy was always responsive to events in the USA. The value of the Canadian dollar was \$0.74 compared with \$0.77 two years ago.

During the first half of 2024, overall travel had increased by 11% year on year, and it was now at 97% of 2019 outbound travel. Travel to Europe and the UK increased by 10% yearly. Travel to Asia and Oceania had increased by 30% but was still only 83% of 2019 levels. Travel to the Caribbean, Mexico, and Central America had increased by 9% yearly and was now 2% more than in 2019.

Mr. Wood highlighted that Hawai'i had been Canada's second-largest international market between January and July 2024, with 261,000 visitors. The average length of stay was 11.2 days, resulting in visitor expenditure of \$645 million and per person per trip (ppptrip) spending of \$2,470. First-time visitors accounted for 34.6%, with leisure businesses making up 91%, although the Canada team hoped to collaborate with the MCI team.

Considering the different islands visited by Canadians, Mr. Wood pointed out that historically, Maui had been the number one destination. Still, recently, O'ahu had taken the lead, with Maui now second. However, Mr. Wood believed that a rebound to Maui was anticipated, especially since many Canadians owned property on the island. The average age of Canadian visitors was 48, with an average party size of 2.3. Notably, 67% of Canadians had passports, compared to 46% of Americans. Canada was the second-largest global market in terms of anticipated annual leisure spending. Despite their reputation for frugality, a recent American Express study showed that Canadians were significant leisure spenders, prioritizing value for money, spontaneous bucket list experiences, and sustainability.

Mr. Wood informed Board members that the high turnover of travel agents attracted younger talent, making it important to provide training to align with the brand strategy.

He commented that solo travel, self-fulfillment travel, and sustainable travel were current trends which were also reported by other GMTs. An overview of air seats indicated fewer seats to Maui, but Mr. Eslinger and the team constantly contacted Air Canada and WestJet, encouraging them to add Maui seats. Initiatives for the remainder of 2024 included Air Canada Vacations FAMs in O'ahu and Maui, with one entirely for French Canadians. Consumer direct media campaigns and travel trade shows continued, including a series with Air Canada Vacations and Maritime Travel Shows, which was very successful. The Aloha Canada signature sales mission in Vancouver, Toronto, and Calgary was scheduled for October 21<sup>st</sup> to 24<sup>th</sup>, 2024.

Mr. Wood remarked that the target audience for Canada was similar to that of other marketing teams: experience seekers, affluent travelers, and snowbirds/retirees. Canadian visitors were unique in making long-duration stays. 70% of Canadian travelers were from British Columbia and Alberta, with Ontario over-indexing at 36% of the desired audience.

Strategies and tactics included reinforcing Hawai'i as beautiful, welcoming, and relaxing, utilizing the theme "Hawai'i – the people, the place, the Hawaiian islands." More direct call-to-action (CTA) inclusions aimed to increase targeted audience bookings. Creative activities ensured a seamless step from inspiration to booking, supported by social media, digital campaigns, public transit activations, and digital billboards.

Mr. Wood mentioned that the team planned greater inclusion of airline booking partners in consumer direct campaigns and promotions for 2025, and these activities were aimed at driving bookings. Planned public relations activities included a group media FAM for fall 2025, year-round individual media visits, press releases, media monitoring, and ongoing pitching. Discover America Canada Day 2025 would bring agents together to excite them about the destination, complemented by Aloha Canada media interviews, receptions, and broadcast television segments.

Mr. Wood informed Board members that travel trade activities were to focus on education and training communications via key travel trade media platforms to keep Hawai'i top of mind. This included webinars, in-person activities, specialist programs, and consistent messaging. Partnerships with cooperative campaigns included activities with Expedia and new partners such as Costco Travel. The latter was yielding impressive results in the Canadian market. The Air Miles loyalty program and Flight Center were also involved. Partner campaigns required incorporating Hawai'i messaging to fill planes and hotel beds. These cooperative campaigns maintained a 1:3 financing ratio.

Regarding public relations and partnership opportunities, the focus included agent-focused trade shows, Aloha Canada 2025, agent-focused FAMs, webinar support, support for individual press trips, and group media FAM support.

Mr. Pfund asked about the percentage of visitors described as snowbirds, staying between one and three months. Mr. Wood responded that the length of stay of a snowbird would have to be defined and that he would discuss it with Ms. Chun.

Mr. Pfund also noted that Costco had become a dominant player in the U.S. market for packaging hotels and asked whether this could become a trend in Canada. Mr. Wood replied that a team in Washington State worked closely with the Hawai'i team, dedicated to incorporating the desired messaging.

Mr. Miyasato congratulated Mr. Wood on his presentation, noting that many Canadian snowbirds spent time in Phoenix before coming to Hawai'i. Mr. Wood added that Florida, California, Arizona, and Nevada were common snowbird destinations.

Chair Hannemann thanked Mr. Wood for his presentation and reminded him of the importance of focusing on the revitalization of Maui.

The Chair announced a working lunch.

g. Hawai'i Tourism Korea - Irene Lee

Chair Hannemann said some of their partners have flights to catch, so he wanted to make it as expeditious as possible. He started with Hawai'i Tourism Korea presenter Irene Lee.

Ms. Lee said it was a great time to talk about Korea after the positive vibe in the room because the Korean market is one of the fastest recovering markets for Hawai'i. Three positive indicators for Korea: The Korean economy is projected to grow 2.4% this year. This exceeds the previous forecast, so they are on a good track. The inflation rate for this year is expected to decelerate from 3.6% last year to 2.6%. This will further stabilize their economy and improve their consumer confidence. The fuel surcharge is also down by 33%, 3% year on year in September. It's about \$120 for a round-trip flight from Korea to Honolulu. The U.S. strong currency makes Hawai'i travel packages less affordable than pre-COVID and compared to other competing destinations. So far, about 100,000 Koreans have come to Hawai'i from January to July this year. More interestingly, the visitor expenditure for the year's first seven months was 248 million, a 98% level of pre-COVID. On average, a Korean visitor to Hawai'i spends about \$313 daily, 15% higher than in 2019. Koreans are spending more money there than before COVID. The merger between Korean Air and Asian airlines is almost completed, as eight of nine required countries and regions, including the EU, have already approved the merger, with the U.S. being the last country to approve. Air Premier, a hybrid service carrier, has established itself as a strong market player in Korea. Air Premier is becoming the solution to the merger between Korean Air and Asian Airlines. Air Premier currently operates five international routes, including L.A., New York, San Francisco, Bangkok, and Narita, achieving an average load factor of 86%.

The exciting news is that Air Premier will launch a direct service to Honolulu during the first half of next year. They were originally planning to launch the flight in January, but the delayed aircraft delivery from Boeing was causing the delay. It will take a few more months until they have the airplane to fly. They will start with four weekly flights, but they will look into flying daily as soon as they have enough aircraft capacity. Overall, the current airlift from Korea to Hawai'i currently stands at about 83%.

Ms. Chun's presentation looked very positive from January onwards from the following year. With Air Premier's new launch, they expect the total airlift from Korea to exceed 2019 level from next year. Their strategic goals are clear and focused. They aim to position Hawai'i as a unique and irreplaceable destination, and they like to highlight the distinct qualities and experiences that Hawai'i offers. Secondly, they wanted to immerse Korean travelers in authentic Hawaiian Culture. This means fostering a true sense of belonging and respect for the people, the place, and the Hawaiian Islands. Thirdly, they are committed to promoting regenerative tourism. And lastly, they aim to cultivate meaningful connections as they want to

inspire travelers to engage deeply with Hawai'i and create memorable experiences.

Their branding message will consist of two parts for Korea in the coming year. First are the people and the place, the Hawaiian Islands. This is to align with the HTA's global initiative to spread the consistent destination messaging. This is to emphasize what makes Hawai'i special by sharing important values of people and the place. And second, your one and only Hawai'i will be pursuing this brand message for Hawai'i in the Korean market. This is to position Hawai'i as the ultimate premium destination offering a high-quality experience. And this is to target their premium spenders in Korea. The target audiences are mindful Korean travelers with high disposable incomes. The geographical target areas are the Seoul and Busan areas. In terms of segments, they will target mainstream travelers, romantic couples, affluent travelers, and fit and sits.

Next, she introduced three major campaigns for next year. The campaign is called The People, the Place, the Hawaiian Islands, and they devised a three-pronged approach. For the people, their objective is to highlight key Hawai'i festivals and deepen cultural understanding for both the local community and Korean visitors. The programs will include launching social media campaigns and partnering with media outlets to share stories about the people in Hawai'i. For the place, this is to encourage responsible tourism and introduce Agri-tourism voluntourism to connect with the local community. Their programs will include educational FAM trips, including the components of these Agri-tourism or volunteerism itineraries on their farms, and they will be creating regenerative tourism content, especially for neighbor islands. Lastly, for the Hawaiian Islands, this is to showcase the Hawaiian Islands as a unique destination with distinct attractions. Their programs will include their Hawai'i travel mission and specialist training programs to educate their travel trade partners.

The second campaign is Your One and Only Hawai'i campaign. This is targeting premium travelers and honeymoon romance market segments. This is a rather commercial campaign compared to their first cultural-oriented campaign. This campaign encourages the target audiences to stay longer and spend more. It has two parts targeting affluent travelers. They will work with our trade partners to create longer-stay tour packages and partner with credit card companies to boost traveler spending. They will roll out golf promotions surrounding the local LGA tournament events and collaborate with department stores to feature Hawai'i attractions in their high-end membership magazines, creating travel content for neighbor islands with top celebrities and influencers.

For the romance market segment, their programs will include honeymoon exhibitions and fairs and conducting romance fans to showcase undiscovered itineraries and romantic spots in the Hawaiian Islands. They will hold a media blitz and develop and share social media content

on this theme. Lastly, the Signature Hawai'i campaign is their third campaign. This is to offer themed travel experiences tailored to special interest tours. These special interest tours include themes like arts and culture, culinary tours, and sports events like marathons, golf tournaments, and surfing competitions.

Mr. Miyasato asked about the merger between Asian Airlines and Korean Air. Will it be Korean Air or both? Ms. Lee said it looks like Korean Air will take over Asian Airlines' branding. They say they will develop a new brand, which will be very close to what Korean Air currently has. It will be combined, but it will heavily influence Korean Air's branding.

Mr. Miyasato asked if combining the two would mean a reduction from a market perspective. Ms. Lee said they believe the Fair Trade Commission of the U.S. has given several conditions to Korean Air to meet for them to approve the merger. One of the conditions is to give away some slots for the overlapping routes of Korean Air, Asian Airlines, and Honolulu. That has caused Air Premier to speed up their launch, but it does not mean Korean Air and Asian Airlines will give up significant slots to Air Premium. It's just to allow a third carrier to fly.

Ms. Agas asked what direct flights they would start. Ms. Lee said it would be four weekly flights to Honolulu.

Mr. McCully asked if about the target markets, the ultra-premium and the romance being the future projections for the targets. He asked about the existing 98,000 and 100,000 bases and what component of the existing demand. Ms. Lee said they do not have current statistics per market segment for Hawai'i. Mr. McCully asked if Air Premier is an all-coach discount type airline. Ms. Lee said they call themselves a hybrid service carrier between low-cost and full-service carriers. But it started essentially as a low-cost carrier for close short-haul routes. They fly economy and premium economy class. They operate in two classes, but their economy seats are larger than those of Asian Airlines aircraft.

Chair Hannemann asked how difficult it would be for them to do a movie/drama production in Hawai'i. Ms. Lee said a survey showed that 64% of Koreans choose their next vacation destination based on the videos and images videos they have seen in movies and dramas, so it was highly influential. The videos, dramas, and big-screen or small-screen content are crucial in motivating Koreans to travel and select a destination. European destinations and some long-haul destinations, especially Middle Eastern destinations, are putting millions of dollars into inviting those film crews to their destination, targeting not only Korea but Asian markets because that content will drive demand. Fortunately, since COVID, the visa waiver program for filming crews in Hawai'i has stopped, so they are losing some opportunities there. Mr. Ka'anā'anā said they have taken this to every level of government, but it is an issue that persists. Chair Hannemann said they must try to figure it out together because it is a lost opportunity that would enhance and contribute to the State.

f. Hawai'i Tourism Europe - Andreas Schunck

Mr. Schunck, the account director for the HTE, spoke about Hawai'i Tourism Europe. He gave a field presentation and wanted to take a moment to introduce Sabrina, their PR manager. The U.K., Germany, and Switzerland are the major markets. Strong labor markets and low unemployment across the three countries. Inflation is heading in the right direction, very low as usual. Switzerland is leading the way with a very strong economy. The exchange rate is in the European travelers' favor - strong British pound, strong Swiss franc, and the Euro is stable against the U.S. dollar, which gives them more buying power in the U.S. GDP in the U.K. and Germany are stagnating with many challenges. Germany depends on exports. China is slow at the moment, as is the automobile industry. Switzerland is doing better, but for the following year, there is a slight growth forecast across the three markets. Consumer confidence and spending will drive that growth to a certain extent, and confidence is up, for example, in the U.K., and is at the highest level since 2021. The good news about the European market is that the number of trips abroad and expenditure are at record heights already. For Germany, in 2024, 122 million Germans are projected to travel abroad, which is surpassing 2019 levels. Expenditures are up, too. The latest forecast for the U.K. is 90 billion for 2024. In the first six months, both the UK and German markets are roughly 5% below 2019 levels for the first six months in the U.S. By the end of the year, they will reach that number again. So compared to the U.S., the U.K. and Germany are doing well.

Travel Trends:

Germans, Swiss, and U.K. travelers are looking for these off-the-beaten-track destinations, especially in terms of their travel experiences on the ground, such as cultural experiences and also nature-based experiences. Luxury is the fastest-growing segment and is a global trend. Germans have 30 days of annual free travel for extended periods. Sabbaticals are very popular in Switzerland. Families are taking kids out of school and going worldwide for three, four-month trips. The Swiss have very deep pockets, too. Sustainability is not only in terms of tourism but also in their day-to-day life, especially in central Europe. It is a very competitive landscape when going on holiday, including hotels, transportation, activities, and activities on the ground. A lot of tourism boards are investing a lot of money. These are the traditional competitors. However, they have new players, such as Saudi Arabia. The good news is that the U.S. is the number one bucket list long-haul destination for U.K., German, and Swiss travelers. It is also the Maldives, Mauritius, Thailand, Japan, Australia, and Mexico. Those are the main competitors. Just a few examples in terms of the size of these markets: the Maldives is the most popular competitor destination, with a 17.5% market share for U.K., German, and Swiss travelers. On a smaller scale, Fiji is a different example, but there is growth year-on-year for long-haul. The economy is going to do even better next year.

Consumer spending is up. There is record spending on travel and trips. This is a good example from Germany. In 2023, long-haul accounted for 9% of all trips abroad, which is an all-time record high. What they are looking for is exactly what Hawai'i is offering them. They have increased air capacity and entered the THE market in January. They are targeting mindful, high-value travelers. They spend more, they disperse more, which is important, they visit multiple islands, stay longer, and they're keen to understand the local culture better when they travel. There are about 15 to 20 million long-haul, high-value travelers across the three markets with a minimum income of \$100,000. For consumer strategy, they started in January 2024 to enhance Hawaii's brand awareness to build trust and credibility, especially after a few years out of the market, focusing on their messaging with responsible tourism, Hawaii's people, the culture, and the natural resources to regain market share. They get them to the consideration phase of their activities, where the objectives are more on education and engagement with personalized content, to educate them on the islands, to increase planning and interaction, and to drive them to the platforms, where they can also collect the data to then, in the conversion part of our activities work with the tour operator airline partners, drive traffic to them and stimulate bookings.

PR strategy is part of a consumer strategy, but he described it as an organic contribution to that. They enhance Hawaii's brand and engage with traditional and digital media, as well as the consumer and travel trade, to share news, updates, festivals, and destination stories. They do that via press releases and individual and group press trips. They will be bringing two groups in 2025. This is very important for a traditional European market to have that organic coverage. Also very important is the travel trade. It's a very complex itinerary to travel to Hawai'i, so the expertise of the travel advisor is crucial as also the financial protection that booking via tour operator provides them with. There are European consumer laws. During the pandemic, they saw a lot of trips canceled, and the tour operators had to refund the customers.

Travel trade is important. They engage with them on a continued basis. They share important news, volunteerism, ecotourism programs, and biological information. They educate them on the islands online and face-to-face. They push the destination specialist program. They will return two product manager groups to the islands and two travel agent firm trips. They do the traditional co-op campaigns with the most important tour operator partners. They have been asked to present a few programs that they are planning for 2025, one of which is the Mindful Hawai'i integrated campaign, which will run over eleven to twelve months. They target mindful travelers seeking inner balance and stress relief from their busy day-to-day lives. The strategy includes the whole traveler journey, from awareness, inspiration, and engagement to booking. They will do that by producing assets suitable for that mindful traveler, video assets, audio assets, but also using their new brand videos from the knowledge bank. They will host that content on a microsite for the mindful traveler, including additional information about planning

a trip to Hawai'i and also tactical offers. They are also partnering with a mindfulness brand app such as Calm or Headspace, where they can increase their reach with a highly targeted audience. They bring the content, video, and audio assets via social media channels and out of the home in a commuter context, e.g., commuters in London, Zurich, and Frankfurt. They can target them with mobile ID location targeting, and those exposed to the out-of-home screens. They can retarget them from digital campaigns.

They have deliverables regarding impressions and reach, so they can measure everything they do. They control the campaign and invite tour operator partners to buy into it. They will work with two partners in each country. There are six in total for the campaign. They have to conduct marketing activities using their assets, brand assets, and messaging via their channels, extending their reach. They can access their consumers and receive their reporting regarding packages, rooms, nights, etc.

The second program is the personal aloha campaign that they are planning for the end of the following year. They will use an AI-powered experience builder. It is becoming more and more important for all travelers globally. The easiest way to explain that campaign is probably the user journey. They plan to deliver the European personal Aloha experience builder via rich media assets to the user. The user can then enter their holiday preferences, nature, culture, beach, holiday whatsoever and press go. In the next stage, AI then curates a list of experiences suitable for their preferences. They will have a brief with the AI platform to provide specified content so that they can ensure they include multiple islands. They include the experiences they want them to have on the island. The user can share their itinerary or preferences with friends via social media. They click through it and get to a microsite where they explore the master itinerary for them and other itineraries. It includes deals that the two operator partners are going to provide. All the engaged users are added to the data pool, and they can then retarget them again with suitable tactical offers. They will bring the experience builder to them via the digital channels, and they have deliverables and invite operators to join these campaigns. They will be selected on the basis that they can produce tailor-made itineraries, cover all the islands, etc. Those are two programs where they invite partners to join campaigns, but they also work with others.

Hawai'i DE is a partner they worked with this year. They have the go-green package where they include three islands, they do a beach cleanup, etcetera. There are different opportunities to work with niche partners. It is about the whole mix and a lot of partnership opportunities.

Mr. Miyasato asked about the competitive environment relative to other destinations. He asked if Fiji was listed in order of preference or just among the locations. Mr. Schunck said it is among the locations. It was just one example of the long-haul traveler. Mr. Miyasato asked how



much desirability there is to fly to these places with regard to access and how long it takes to get there. Mr. Schunck said connectivity is important. There was pent-up demand for bookings in 2022 and travel in 2023. Now, they see that a trip to Hawai'i became more expensive with a hotel rate, and there is the long-distance issue. Consumers are a bit hesitant to book now. They will let them know it is worth spending the time and the money. When looking at the average 13-day stay on the islands, it is mostly a standalone holiday. Some are combining it with the West Coast USA. These long-haul do not mind long distances.

Mr. Miyasato asked if a nonstop option from London or Frankfurt would encourage more travel. Mr. Schunck said yes, a direct connection is always the best thing to have. The U.S. is so popular. There will be 2 million visitors from Germany alone. He said a direct connection would boost the market.

Mr. McCully said they just reentered the European market, and the three traditional countries they work with, the U.K., Germany, and Switzerland, have high national incomes. In modern marketing, it is very easy to target specific metropolitan areas, such as Northern Italy, portions of France, portions of Germany, and portions of the U.K. He asked if they would be better off being specific for ultra-premium long-period leisure consumers rather than a country. Mr. Schunck said they are currently looking after the U.K., Germany, and Switzerland with their marketing efforts. They do that demographic targeting.

Mr. McCully said Fiji is the most comparative to Hawai'i. Mr. Schunck mentioned competitors like Thailand, Maldives, Mexico, and Cancun.

e. Hawai'i Tourism Oceania - Darragh Walsche

Mr. Walshe spoke about Hawai'i tourism in Oceania. He introduced his team. Jennifer Gaskin is the account director; Anna Rydell is the PR and trade manager; and Marie Robinson is the marketing campaign specialist. Jacqui Walshe was at the conference as well. She is the CEO of the Walshe group, based in Sydney. The first slide showed visitors from January through to August. The Oceania market is one of the top markets for spending per trip, adding the average per person per day, currently over \$300 per person per day. They have a very high length of stay, 9.4 days. This year, they are down around 11%. After two years of good growth since COVID, they found the year very economically challenging, and the U.S. dollar exchange rate hasn't helped. In terms of airlift, they have seen a fluid airlift into and out of the market. Airlines are picking higher yield markets with a good balance of outbound and inbound. Hawaiian Airlines changed from all-year-round service to just seasonal service in New Zealand. That season is based around the higher yield U.S. market coming into New Zealand.

They see inflation coming down, interest rates coming down, and the exchange rate improving slightly in 2025. The Australian dollar at the moment is around \$0.69. They want to get into \$0.70, towards the upper end of 0.70, which will make a big difference for the market. In terms of the competitive landscape, he showed the five top outbound destinations for Australia and for New Zealand compared to 2019 - Australia, Indonesia, Bali, Japan, and New Zealand. Fiji has seen continued growth.

Strategies in terms of their key campaign themes are around regenerative tourism campaign themes that are aligned to that. The market sees and loves Hawai'i for that sun, sea, and sand destination but also understands that Hawai'i has so much more to offer. The market is very much in tune with the fact that they are looking for an enriching holiday, but at the same time, experiences that can enrich the local people. The major program is "We are Explorers," with an Australian influencer who traveled to Hawai'i and really connected with the heritage and those special places and traditions. It's aligned with what they are doing and is aligned towards the people, the place, and the Hawaiian island, which will be launched in their market next year. They have done a few teasers with a really good response. Their market also loves the Hawaiian culture, and they will partner with Traveler magazine in Australia to create experiences closely connected to the culture.

Trade is still extremely important in their market, even more so than pre-COVID. It is very important that they dedicate a lot of the marketing plans and budget towards that trade, especially around co-op. Some of their co-op partners for next year include Qantas as well. Qantas will take over the Jetstar services ex-Melbourne starting in May of next year. This is great news for them because the Qantas service is much more aligned to the high-value traveler that they are looking for in Hawai'i.

The month of Lei is all about destination training. It's all about the island Visitor and going in-depth into travel trade training and is part of a whole month of showcasing Hawai'i. Aloha Down Under is the one that brings industry into the market. Sport has been mentioned quite a lot. They love sport and water. There are a few things that they are doing that are connected to the ocean. The one swim event that they hold in Fiji attracts 250 people, and they are talking to those organizers to bring it to Hawai'i the following year. They will also hopefully be bringing Sea Cleaners back to Hawai'i next year. Sea Cleaners is about the ocean, their connection as Pacific Rim neighbors, and the importance of taking care of the ocean, particularly around the issue of plastics. They bring youth ambassadors from around the Pacific Rim to Hawai'i to collaborate with local kids, youth, schools, and beach cleanups, but really hopefully help make a difference in terms of this next generation coming through and all these things. They have media that comes along as well. It is very much aligned with the concept of regenerative tourism, where travel and tourism can connect people and make a positive difference in the

environment, communities, and culture.

Mr. Miyasato asked if he was saying that they were turning the corner. Mr. Walshe said yes and that a lot of it is related to the interest rates. The Reserve banks for Australia and New Zealand have kept the cash rate quite high, which has put a lot of pressure on everyone. They are happy that inflation has come down to a level that they can start bringing that cash rate down. So that will put more money in everyone's pockets. What has kept them going is the repeat visitor. This year, about 58% of the visitors are repeat visitors from the market. They are loyal customer, know Hawai'i well, are also high value, and can cope with the economic challenges.

Chair Hannemann said L.A. will be the mecca of sporting events, so they are trying to foster that. The governor has encouraged the HTA to see whether teams fly from across Asia or Oceania and go to the Olympic Games. They want to encourage them to stop in Hawai'i on their way over to get that extra good luck and the spirit of Aloha as they go to the Olympics. He asked if Mr. Walshe could influence that. It would be great because it fits in with what Brand USA has talked to them about and how Hawai'i can benefit from the Olympics. Mr. Walshe said it is a good idea, and they can partner. It is also about ensuring that there are facilities in Hawai'i so they can work with local sports entities to see what they can put together to promote it.

#### h. Hawai'i Tourism China - Dennis Suo

Mr. Suo spoke about the China market. The general economy, the Chinese GDP, has been facing some challenges over the past two years. The economy is facing a big challenge in terms of the housing and stock markets. The great thing for the tourism market is that the exchange rate is very stable, the U.S. dollar versus the Chinese Yuan. China is probably the only country facing deflation. Two weeks ago, the Chinese government announced the biggest economic stimulus package since 2008 to address multiple challenges, including the property market downturn and weak consumer spending. The package includes cutting the interest rate from 2.3% to 2%. The government plans to issue an additional 2 trillion Yen, equivalent to \$300 billion, into the market, equivalent to about 2% of the country's GDP. In response to this announcement, mainland China and the Hong Kong stock market rallied before the golden week, and they posted their best week in 16 years. The Hong Kong market has been surging pace since 1998. This will boost travel.

Since 2023, they have seen a great recovery in the China market. The latest forecast is that by the end of 2024, it's about 20% versus 2019, meaning there will be about 130 million Chinese travelers traveling outside of the country. During the recent May labor holiday, one of China's peak golden weeks or travel seasons, there was a big increase in those long-haul destinations.

The number one is the UAE, mainly Dubai, which is 66% higher. Secondly, Turkey, Italy, Australia, and the U.K. They are also seeing more family packages in the market. The group is significantly decreasing in terms of the tour pattern. 130 million people will be traveling outside of China this year versus the previous year, with only about 87 million, which is an 80% increase. The U.S. alone will receive about 1.7 million Chinese visitors this year. Last year, it was 850,000, so it doubled. The latest forecast is that 30 million Chinese travelers will be recovered to Europe and many Asian countries, given the Visa Viva program. They are also seeing big numbers surging, like Thailand and Singapore. Saudi Arabia also looks at China as one of its key markets in which to draw visitors. For Oceania, it is the same. It is considered another long-haul competitive landscape. All eight Chinese airlines restore their flight to Sydney. The number one island resort destination competitor is Maldives, so they also restored all five major cities' direct flights to Maldives in the year. They do not have nonstop direct flights yet, but in 2023, they had about 35,000 Chinese visitors to the islands. They flew through Japan and Korea, and about 350 weekly flights connect over 20 Chinese cities to Tokyo and Seoul.

Mr. Nāho'opi'i attended the U.S. China Tourism Summit in China, and they had a chance to sign the strategic MOU with Spring Airlines had a new program launched this year, connecting five cities through Tokyo to Honolulu. They have some great connecting initiatives happening in the market. They are working very closely with DBECT, the U.S. embassy, Beijing, and other airport authorities, as well as both Senate House tourism committees, engaging all the relevant parties to coordinate the efforts to launch the direct flight. Three key target audiences are the Millennium family and the high-net-worth individual segment. He highlighted the high-net-worth individual segment. China is now the second-largest high-net-worth individual market. Those are defined as people with at least \$1 million in liquid assets. As of 2023, there are approximately 2.6 million high-net-worth individuals in China, and the number is expected to grow by 47% in 2028. This is their market, the top tier 1%. They focus on the people and the place, presenting Hawaii's culture and diversity, as well as natural beauty, as their core value proposition.

Consumer strategy - The social media marketing strategy is the number one priority. In China, the social media landscape was completely different from any other country, particularly in the West. There are so many different platforms. They choose platforms based on the market reach and alignment with their target audience's behavior and preferences. Number one is WeChat. Weibo Douyin is also considered important for wide-reach social media campaigns. Weibo is similar to X; Douyin, the Chinese version of TikTok; Xiaohongshu (Little Red Book), similar to Instagram, also the new evolving emerging social media platform. Those are the four key platforms that they focus. In content strategy, they highlight the things to do across the different islands with content that captures unique experiences and cultural insights. Mālama Hawai'i promotes a concept of responsible tourism through environmental and cultural stewardship. The key element is keeping consistent messaging across all these platforms and

collaborating with industry partners such as airlines, OTAs, and U.S. embassies to leverage their industry partners' accounts to increase viewership.

For travel trade, the focus is to continue their travel trade education to all those key OTAs and wholesalers. They also provide some of those FAM trip experience. The partnership with OTAs industry collaborated with OTA and airlines to develop creative bonded travel packages and join the social media campaign. They synergize with their partnership, such as the U.S. Embassy, Grand USA, and Education USA, on joint marketing campaigns and roadshows. This year, they had a very successful first China travel mission in May, and post-pandemic, it's been like a wave for almost four years. They had 13 stakeholders join this China travel mission, Beijing and Shanghai. They partnered with IDB Shanghai. The following year, they are looking to partner with Macau International Tourism because they receive great support from the Macau Special Administrative Region government. The goal is to expand their market reach for stakeholders further. Not just looking at mainland China, they have also covered Hong Kong, Macau, Taiwan, and Southeast Asia. It will be a great platform for continuing their travel mission and going beyond mainland China. This will be from April 25 to April 27, 2025. The partnerships are on the HTA website.

They are focused on three things in the market. Number one is social media. They have limited resources and budgets, so digital excellence is their top priority. Social media platforms evolve and must ensure consistent messaging across the channels to stay ahead of the dynamic market. Number two is travel trade, which leverages all the key industry partners as they also receive great support in the China market and other U.S destinations like California, New York, Vegas, and OTA airlines partners to amplify their reach and impact. Number three is DBEDT, which synergizes what they do in China with all their limited resources, particularly in a very complex city marketplace, unlike Japan or Korea. The message in China is to convey the Aloha spirit. The final goal is to bring direct flights back.

Mr. Miyasato highlighted what Mr. Suo said: They cannot do everything themselves with limited resources, and this applies to them all. Chair Hannemann said he is meeting with the secretary of commerce in Washington, DC, as part of his travel tourism advisory board and he will share this information with her, because she's the lead tourism person in the cabinet and she's very focused on China. Hopefully, there are ways that they can identify where Hawai'i can take advantage of what the federal government wants to do because China and Japan are their two major priorities.

Mr. Nāho'opi'i said the staff would like to request a motion to approve the presented calendar year 2025 brand marketing plan. Mr. Miyasato made a motion. Mr. McCully seconded. There was no discussion. Mr. Gionson did the roll call, and the motion passed unanimously. Chair Hannemann thanked the GMTs.

## **11. Discussion and Action on HTA’s Financial Reports for July and August 2024**

Mr. Arakawa made a motion to approve the HTA’s financial reports for July and August, as presented by Mr. Choy. Ms. Agas seconded. Mr. Choy spoke about the financial reports for July and August. Mr. Choy spoke about the handout for August. The balance sheet on page 3 shows resources and encumbrances. The income statements on page 4 show the performance of each fund. Supplementary information the Board had been asking for was added at the end of the financial statements. It is a schedule of all the budget line items and shows the performance on pages 19-21. There were no questions online or from anyone. Mr. Gionson made the roll call, and the motion to approve the financial reports was carried out.

## **12. Presentation, Discussion, and/or Action to Approve Additional Expenditure of Tourism Emergency Special Fund Monies Relating to Maui Recovery**

Mr. Arakawa said this was to approve an additional expenditure of \$130,000 from the Tourism Emergency Fund for Maui recovery efforts amidst declining visitor expenditures and arrivals. He made a motion to approve the additional \$130,000. Ms. Agas seconded.

Ms. Anderson spoke about the handouts. In December 2023, the Board approved the Maui Recover Plan, which identified many focus areas, including increasing visibility and call to action for travel to Hawai’i targeting the high potential markets supporting businesses to continue to provide a consistent message that Maui is open for visitors, support and encourage consistent messaging and outreach to Maui residents, visitor industry, stakeholders and businesses. She spoke about expanding tourism products on Maui to provide new activities for visitors and to support Maui businesses.

On June 24, 2024, at the HTA BFCC, Ms. Anderson reported on the status of the use of the Tourism Emergency Special Fund. The balance of the Tourism Emergency Fund (TESF) was \$125,000. Since then, HTA’s Finance Department has determined that approximately \$130,000 remains for Maui Recovery from the Tourism Emergency Special Fund.

On September 17, 2024, Gov. Josh Green issued the seventeenth emergency proclamation, which extended the disaster emergency relief period through November 16, 2024. It authorizes the HTA, in coordination with the Department of Budget and Finance, “to use monies in the Tourism Emergency Special Fund to respond to the emergency and provide relief under section 201B-10, HRS. Year-to-date, in August 2024, Maui visitor expenditures were down by 20.3% and 2.3% for the State. Arrivals to Maui decreased by 17.5% and by 2.2% in the overall state. The County of Maui has communicated to the HTA that continued assistance is needed for

Maui's recovery as it relates to tourism. The staff is asking for the approval of \$130,000.00 from the Tourism Emergency Special Fund for Maui's recovery from the wildfires. The staff recommends that the Board approve the proposed actions and budget to support Maui's recovery from the wildfires. \$100,000 for Hawai'i Tourism United States Fall Marketing Recovery Campaign (Q4 2024). Support Maui small businesses and Maui Made products through the marketing and promotion of a Mākeke at \$23,000. Marketing and Promotions of potential Sports Events on Maui at \$ 7,000.

Ms. Agas asked who would be monitoring numbers 3 and 4. Ms. Anderson said the CNHA would be responsible for marketing and promotions. They might RFP the \$7,000. Ms. Agas asked if it could be earmarked for the university.

Mr. Miyasato asked if those monies came from the original \$5 million emergency fund, and Ms. Anderson confirmed that as correct. This brings the amount to zero. Chair Hannemann said they are still in an emergency. Mr. Choy said the funds are topped off monthly, as shown in the revenue report. Chair Hannemann said making it the highest priority.

Mr. Arakawa said they asked the AG to review this because it is the statute. Ms. Paishon supported this. She said with the support of Dir. Tokioka wrapped up the Maui Economic Recovery Commission and said that the full report is going through DBEDT's office and with co-leadership of the county of Maui. She wanted to ensure that many of the things being discussed were directly aligned with community-generated ideas to bolster Maui's economic recovery. It will be wrapped in the county's long-term recovery plan. This should be a very high priority.

Dir. Tokioka asked a question online. He added to what Ms. Paishon said. He said Ms. Paishon did a great job facilitating the recovery commission. Mr. Arakawa gave kudos to Ms. Anderson and the staff for their work together on the marketing recovery. The digital marketing aspect and the promotion aspect were recommended by the travel industry partners on Maui. They consulted with travel industry partners in Maui whose hotels and businesses were not doing so well. They thought digital marketing would be a good idea to reach many more people on the mainland, in the neighborhoods, and in O'ahu. Mr. Gionson did the roll call, and the motion passed unanimously.

### **13. Report on the Governance Study Permitted Interaction Group**

Ms. Iona said the PIG committee deferred the report that was ready in July. The committee completed its positioning about getting the study completed. They left it in the hands of the RFP contractor, who they felt did a great job of quickly making it. Their recommendation was to create a new governance PIG committee. They recommended having four Board members on

the PIG addressing the issues outlining the reports. She would provide a final report recommending working in collaboration with Mr. Nāho‘opi‘i about being the point person on all the milestones they will create. The new PIG will be able to report before the 2025 legislative session. The committee recommends the full Board, through its chair, initiate a press release to identify a path forward in the governance study.

Ms. Paishon added that the intent is that the PIG committee is going to align with the efforts of the staff and the Board, and they are going to consolidate the planning efforts, whether it be the destination, stewardship, mapping, planning, and strategic functional plan, as well as look at the next steps to carry forth recommendations from the governance study. She reinforced that they are in full support of consolidated planning and implementation.

Chair Hannemann said the recommendation was deferred to the next meeting.

**14. Discussion on the Membership of Standing Committees and Permitted Interaction Groups**

**15. Motion, Discussion and Action to Create an EXECUTIVE STANDING COMMITTEE for the Purpose of Guiding Tourism Policies and the Authority’s Strategic Direction**

**16. 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”**

Many said they should move forward with trying to fill some of the committee assignments because two new members have come on board, and only one of the new members has been on one committee. That has caused some strain concerning some committees having all members show up to have a quorum and take action. Chair Hannemann wanted to go through the process that they had outlined. He expressed a preference for committees that they would like to serve on. It also requires discussing a motion to approve a new committee he had broached earlier. He wanted to bring it back again for discussion and approval today. That is the creation of an Executive Standing Committee. He said this was an opportunity to have a committee to examine the authority, strategic planning, tourism workforce, education, training and career counseling programs, and guiding tourism policy. That comes with the BFCC and with the Administrative Audit Committee. There is a state functional plan already in progress whereby they could solicit input from a tourism perspective, but that also entailed developing broad tourism policies across multiple agencies. He said it was great to see, for example, the Department of Transportation at the conference. They have work to do with DLNR and all the other affected agencies. This is an opportunity to guide tourism policy with the State functional plan. He said the Board could provide some guidance to their Strategic Plan.

Ms. Anderson has been eager to get the process going but does not want to proceed without



guidance from the Board. She is ready to launch in October. That will put the Board in a position to have a Strategic Plan before the State legislature in 2025. This is the basis of a new five-year Strategic Plan. Mr. Nāho'opi'i has already outlined a vision and a plan. He said some legislators would like to know what their next five-year strategic plan would look like. He spoke about the legislative and government affairs. This would oversee the legislative pig that they would have to form when they have to discuss matters that should be held within the confines of a more focused discussion, or they might be violating some aspects of how bills are discussed or how they are going to be voted upon and the like. The Executive Committee would allow a year-round discussion of legislative matters, or they would have to go into a PIG. He said they are also concerned about how the county government is. This will also allow the Board to discuss it on an ongoing basis. He said, in short, it's a tourism policy committee.

They could focus on three distinct areas – the State functional plan, the HTA strategic plan, and the legislative affairs. Mr. McCully started with the housekeeping issue, the twelve-member Board in 2023, with four investigative and four standing committees. Investigative committees occur from time to time. He said they are unsure what 2025 would bring, but they have a governance study, a disaster response, and the legislature. Budget and finance asked for a PIG. For the eight standing committees they have, if there are three responsibilities per member, that is 48 slots. That means that each member has four areas of responsibility beyond being a monthly attendee of these meetings. By housekeeping, he was referring to capacity. He said he would like to keep the discussions fresh on their committees without a fatigue factor creeping into their service on this board. He proposed that it be discussed in the Administrative Audit Committee for further consideration. He said they need to be more mindful of their existing responsibilities and how to execute them.

Mr. Miyasato said he understood what they were trying to accomplish before he became the chair. He agreed with Mr. McCully that there are too many committees. This is a volunteer effort from Aloha on all of their parts. He said they must back the chair's full faith, power, and influence. If they do that, they do not need to form another committee. That was his vote.

Mr. McCully clarified that the bylaws state that the chairperson shall preside over all meetings, shall have general charge and supervision of the authority as delegated by the Board of Directors in its whole, and shall perform such duties as are incidental to the office or are required by the Board of directors. He said he is not inclined to serve on a board where if they have a responsibility to delegate powers and do not exercise that delegation, they fail their responsibilities as directors. He said if they want to have an administrative and audit committee meeting, where they delegate specific powers to the chair, he would be happy to sit in on that. He is not a member and does not have a vote, but he would join in on the debate if it goes back to the full Board to determine the specific powers. He said they should not revert to an

autocratic process that was behind the curtain.

Mr. Miyasato responded. He said that in the context of the full Board delegating responsibility to the chair, that function is codified by putting him into the chair position by vote. He said they must lead and direct and be the voice for the Board.

Mr. Arakawa said the bylaws outline the duties and specify the chair's duties. If there are more issues to vote on, the Board has to vote on and delegate them. Mr. Miyasato asked if they could collectively vote on bylaws that give discretion to the chair as voted into the position, the autonomy to manage this Board. Mr. Arakawa agreed to that but said that it is not the state of the law or the bylaws at the moment.

Mr. Miyasato said they changed the bylaws to reflect what needs to happen for the dysfunctional board to function.

Chair Hannemann said he brought it before the Board because he went out with a second survey asking if they wanted to serve on the committee. The number one committee they all wanted to serve on was the Executive Committee. He was not bringing it before them to try to centralize power for the sake of the Board chair being able to make decisions. He thought that this was an opportunity to focus on some of the things they needed to do as a group collaboratively. He said the Strategic Plan is very important. When it comes to policy, it is clear on the operations side. This is the policy for the operations of HTA. He does not agree with member Mr. McCully's reason for not doing it. He said they have twelve members. There is plenty of time to spread the workaround. He said he does not like PIG committees as he likes to do things in the open. They should only convene a PIG when they have to. He said having a Standing PIG committee on legislative affairs does not make sense.

Dir. Tokioka slightly disagreed with Mr. Miyasato's comment about the Board being dysfunctional but said they are passionate about issues. He said the recommendation from Mr. McCully to bring it back to the committees for discussions has worked before with the Board. He also advocated for the 12th member. He said Gov. Green will make the recommendation shortly. That would give them the time to discuss, including the 12th member. If Chair Hannemann wanted to pull back on the Executive committee, that is his prerogative, and they can vote that up or down. He agreed with Mr. McCully's suggestion to have the dialogue on the different committees and to the point where they can decide if they change the committees and how they are structured.

Mr. Miyasato clarified that the dysfunction description is not related to people but to the body's function. He said the Board decides collectively what the infrastructure is and what the

organization is. Looking at any successful board across the country, it is in unison. They have one lead and one chairperson who manages the board. He suggested that when voting in a chair, vote on someone who will lead, organize, and build loyalty and respect for the HTA.

Ms. Iona said her concern is that they have two committee members who have not been on any committees. She hoped they could fill their committees as in the past and hold the one or two seats available. She felt bad for the members who had not had a voice yet.

Mr. Arakawa agreed with what was said today and the priorities Chair Hannemann set out. Still, as Mr. McCully said, existing committees handled many of the items in the past. The reason for the legislative pig is to get all the islands involved and talk to legislators.

Mr. Miyasato asked how it worked out from a Budget committee perspective, going to the legislature to get funding for the HTA last session. Mr. Arakawa said that before the two sessions, they had to the end, and something happened that was not the fault of the HTA. It was an intervening person or persons.

Mr. Miyasato said they lost funding through the legislative PIG they had in play last year and lost footing as the HTA. Mr. Arakawa said it was not because of the PIG that they lost.

Chair Hannemann said they must move on. He said the majority voted that they wanted to go on an Executive Committee and said they could if they wanted more time to deliberate. He was determined in the meeting to look at the four existing standing committees and make recommendations so that they can take advantage of some talent on the Board that is not being utilized and for the twelfth member to sit on a couple of these committees. That means that they do not have to discuss the agenda item that deals with changing the wording of the Administrative Audit Committee. He wanted to move to agenda item 17.

## **17. Action to Elect Board Members to Standing Committees and Permitted Interaction Groups**

Chair Hannemann spoke about the survey. He said there would be six members on the Budget Committee, six on the Administrative Audit Committee, five on Ho'okahua, five on the Branding Stand Committee, and whoever that 12th member is, they have two committees for that person to serve on, right away. They could go to a six-member Ho'okahua committee and a six-member Branding committee. Chair Hannemann said they would vote on what was submitted in the survey. Ms. Agas clarified that when she voted, she was basing it on the Executive Standing Committee, but if they were not putting it out there, she would change how she would want to sit on the committee. She said they need to fill the vacant spots currently. They need Mr. West and Mr. Pfund to share their talents. She asked if they could assign those and when the next member was if they could do this as one group. That should be at the next meeting. She said the committees are good, and she likes the committees she is on.

Mr. Arakawa said he would support that. Ms. Agas said they could find out if Mr. Pfund would want to serve on the open slots, but Chair Hannemann said Mr. West is not present. Mr. Miyasato said the number one choice was the Executive committee. Mr. Arakawa asked if they could defer.

Chair Hannemann said they cannot keep bracing decisions on when this twelfth member will arrive. They have to decide, whatever is open at that particular point in time, that's where that member will serve.

Dir. Tokioka asked if the two other slots that Mr. West requested were available. He said he did not hear Chair Hannemann's answer to the question. Chair Hannemann said he did indicate the committee he wanted to be on.

Mr. McCully said this was in an email sent out on October 1. He said Chair Hannemann and Ms. Paishon did not put any preferences down.

Dir. Tokioka said he put down the Executive Committee because of the awkward situation at DBEDT. He would like to have a say, but he is happy with the two committees he is on. If Mr. West's wishes are taken care of in the vacancies, then he said that would be fine.

Chair Hannemann suggested that Mr. West join the Ho'okahua and Branding committee.

Dir. Tokioka asked about Mr. Pfund. Chair Hannemann said he had requested to be on the Budget and Branding committees.

Dir. Tokioka said he was happy with that. He said Mr. Pfund would be happy to continue serving on the Branding and Budget committees. He had also asked to be on the Executive committee, but he said that it would be fine if not put in place.

Mr. Arakawa said the Budget committee is full. Mr. Ka'anā'anā said the Ho'okahua committee is full.

Chair Hannemann said Mr. Pfund is a certified CPA who knows how to run the budget, so not having him on the BFCC makes no sense.

Mr. Miyasato said waiting for the twelfth member does not preclude Chair Hannemann from reshuffling the deck chairs once they have the whole twelve. Chair Hannemann said he was going to reshuffle the deck. He told Mr. Pfund that they could not grant him his request to go on the BFCC. Mr. White said he would give up his seat on the BFCC to Mr. Pfund. Chair Hannemann said they could do it today. There will be two courses of action. One is to present Mr. Pfund to replace Mr. White and to have Mr. West added to the Ho'okahua and Branding

Committee. Mr. Pfund is already on the Branding committee and will be added to the BFCC.

Ms. Agas asked for clarification on the voting. Chair Hannemann clarified that when the twelfth member comes on, he will return and ask the committee to vote on his recommendation. Mr. Arakawa asked if they would complete the form, and Chair Hannemann said they would do that. There was discussion about who votes and who recommends.

Mr. Ka'anā'anā clarified that there are two vacancies on the Ho'okahua committee, but he only heard one name. Chair Hannemann said they can have five members on the committee. He asked if Ms. Paishon was happy with a five-member Ho'okahua committee.

Mr. Cole said the one motion would be to add Mr. Pfund to the Budget committee, to add Mr. West to the Ho'okahua and the Branding committees, and to remove Mr. White from the BFCC.

Mr. Miyasato made a motion, and Mr. Arakawa seconded. The motion passed unanimously.

Mr. McCully said the fact that eight people signed up to serve on the Executive committee leads to a logical fallacy. Chair Hannemann said they would suspend the meeting in October and then return in November, but if they do need to meet, they can arrange the meeting. Mr. White said going 55 days before the next meeting is highly irregular. Chair Hannemann said they could take a look at that.

Dir. Tokioka said he agreed with Mr. McCully because if they got the twelfth member, he would want to participate in the meetings, and they would all want that too. Chair Hannemann said they would revisit that if necessary.

## **18. Adjournment**

The meeting adjourned at 3:12 p.m.

Respectfully submitted,



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Sheillane Reyes

Recorder

**7**

**CEO Reports**

**October 2024**

**November 2024**



# HTA CEO REPORT

OCTOBER 2024

## EXECUTIVE SUMMARY

The Hawai'i Tourism Authority (HTA) provides this report as a resource to the Board and the public to better understand the activities and actions taken by the team in the month of September 2024 in support of the organization's overall mission, its strategic plan, and the community-led Destination Management Action Plans.

Office of the President & CEO: Recruitment for vacant positions was ongoing while continuing to process the proposed reorganization plan through DBEDT and DHRD.

Destination Stewardship: September was another bustling month with major events like the 2024 Aloha Festivals as well as other Signature and Community Enrichment events. HTA staff also worked closely with Kilohana on the Community Tourism Collaboratives, Foundational Technical Assistance Programs, and Curator Program. Lastly, on September 20, 2024, the application period closed for the 2025 Term 1 'Umeke RFPs for projects taking place from January to June 2025.

Brand and Marketing: September was another busy month for the brand team as we prepared for the tourism conference. During this period, we also focused on the review, revisions, and approval of all brand marketing plans for the calendar year 2025. Additionally, we finalized the mid-year evaluations for all global marketing teams for 2024. Through the HTA RFP 25-05, CON 25008 Korea MMA contract for the 2025 Brand Marketing Services was executed as of September 27, 2024. PON 25014 for US Marketing Maui Recovery Plan 3 was executed on Oct. 10, 2024.

Planning and Evaluation: A huge portion of the planning team's efforts in September was finalizing tourism conference programming and sessions that the team was in charge of. In addition, an RFP was issued for a visitor industry career motivational program and HTA's Work Wise Program. Discussions also took place with UH Mānoa for the Ho'oilina Hawai'i Scholarship.

## II. OFFICE OF THE PRESIDENT & CEO

**Functional Statement:** The Office of CEO is responsible for implementing the policies and instructions of HTA's Board of Directors and administering the activities of HTA by planning, organizing, directing, coordinating and reporting its work.

- Leads relationship with Governor, Legislature, Board and state agencies



- Leads relationship with national tourism policy and strategy, Congressional offices, and national and international industry organizations
- Oversees HTA's strategic direction and performance
- Oversees HTA's administration, resource allocation, vision, and culture

### ***Duties of the CEO***

- HTA Leadership met with Representative Sean Quinlan to continue discussion on HVCB contracts and Destination Management App
- Briefing of House Finance Committee and new FIN analyst
- Represented HTA at the Aloha Festivals Royal Court Investiture and Opening Ceremony
- Addressed Hawai'i Cruise Executive Summit
- Keynote panel presentation at the CNHA Conference on Native Hawaiians in Tourism leadership
- Guest interview appearance on the Mel Rapozo podcast (Chair Kaua'i County Council)
- Participation in the Los Angeles Saturation campaign with HTUSA. Live interviews with the local morning show, interviews with other local media, meeting with governor, hotel owners, and legislators, and hosting evening trade and industry partner events.
- Participation in the Japan Legislative and Industry Mission. Attended meetings with airlines and tour agency leadership to strengthen relationships. Two public appearances at the JATA Expo to announce MOUs with HIS and JTB. Panel presentation workshop with Brand USA Japan on driving demand from the Japan market.

### ***Proposed Reorganization***

The HTA organization continued to transition into the structure presented and approved by the HTA Board at its July 2023 meeting. The objectives of this structure were to strengthen island-based management, increase resources for destination stewardship, and have dedicated leadership for branding and marketing. The Request to Reorganize documents were submitted to DBEDT and are still under review by DBEDT staff. Since the positions are now funded through general funds, all requests to fill or establish positions must go through the Governor. Of the HTA's 30 positions there are currently 12 vacant positions including the five new Destination Manager positions, the CEO, Chief Brand Officer and the recent vacancy of a Brand Manager position. Currently six positions were in the recruitment process (Destination Managers [5] and Account Clerk III), two were approved by the Governor and are being processed for recruitment (Brand

Manager and Contracts and Administrative Manager), two were in process of approval with the Director (newly vacated Brand Manager and Planner), and the CEO and Chief Brand Officer are not being processed at this point until the Board PIG has provided their report. Recently hired was the Administrative Assistant for Destination Stewardship, Mei-Lin Bruhn.

## ***Public Affairs***

### **Maui Wildfires Recovery**

HTA staff continues to focus on tourism's support for Maui's overall recovery following the August 8, 2023 wildfires. Pursuant to HRS §201B-9, a gubernatorially-declared tourism emergency is in effect until November 16, 2024 by order of the 17th Proclamation Relating to Wildfires.

### **Hawai'i Tourism Conference (September 30 – October 2)**

- Drafted and distributed the following communications to drive awareness and encourage registration.
  - News Release: Hawai'i Tourism Authority Announces Hawai'i Tourism Conference, Sept. 30 to Oct. 2 (September 6)
  - E-Blast: Engage with National Tourism Policy Leaders and Brand USA (September 11)
  - E-Blast: Early Registration Extended; Community-Driven Destination Management: The Transformation of Hā'ena State Park (September 16)
  - E-Blast: Register Today; Cultivating Agritourism in Hawai'i (September 18)
  - E-Blast: Early Registration Deadline Approaching; Building Local Capacity Through Regenerative Tourism (September 20)
  - E-Blast: Early Registration Ends; HTA's Curator Program: Elevating Responsible Tourism in Hawai'i Workshop (September 23)
  - E-Blast: Developing Hawai'i's Visitor Industry Workforce Pipeline (September 25)
  - E-Blast: Leadership in Destination Marketing and Stewardship (September 26)
- Coordinated and/or assisted with the following interviews and statements, including:

- Mel & Charlie Show: Daniel Nāho'opi'i (DN) Facebook live interview on Hawai'i Tourism Conference. Drafted talking points. (September 20)
- KHON Wake Up 2Day: Ilihia Gionson (IG) interview on Hawai'i Tourism Conference. Drafted guest form. (September 16)
- Hawai'i News Now Sunrise: IG on Hawai'i Tourism Conference. Drafted guest form. (September 24)
- Ashley Nagaoka, Hawai'i News Now: Kalani Ka'anā'anā (KK) interview on Transformation of Hā'ena State Park destination management example. (September 25)
- Stephen Florino, KHON: IG, KVB Executive Director Sue Kanoho and Westin Maui General Manager Josh Hargrove interviews on Hawai'i Tourism Conference, rebuilding tourism and August 2024 visitor statistics. (September 30)
- Chris Latronic, KHON: IG interview on Hawai'i Tourism Conference. (September 30)
- Kristen Consillio, KITV: DN and Director Tokioka interviews on Hawai'i Tourism Conference, rebuilding Japan tourism and August 2024 visitor statistics. (September 30)
- Casey Lund, Hawai'i News Now: Hawai'i Farm Project's Tambara Garrick interview on Hawai'i Tourism Conference and agritourism. (September 30)
- Drafted talking points for the following speakers:
  - Travel & Tourism Advisory Board Chair Bill Hornbuckle video script (September 4)
  - Governor Josh Green welcome remarks (September 30)
  - Representative Sean Quinlan welcome remarks (September 30)
- Compiled media invitation list and managed RSVPs. Confirmed media included:
  - Allison Schaefer, Honolulu Star-Advertiser
  - Kathleen Wong, USA Today
  - Jason Genegabus and photographer, Hawai'i Hospitality
  - Lina Girl Langi, KITV
  - Hugh and Lela Gentry, KITV "Kuleana"
  - Davey D, KITV
  - Ku'uwehi Hiraishi, Freelance

- Secured and managed videographer/photographer on-site. (September 30-October 2)
- Updated website with the latest information.

### **News Releases/Reports/Announcements**

- HTA Message: Last Call for 'Umeke Community Partners (September 10)
- Report: Hawai'i Hotel Performance Report for August 2024 (September 23)
- Report: Hawai'i Vacation Rental Performance Report for August 2024 (September 26)
- DBEDT News Release: August 2024 Visitor Statistics (September 30)
  - Drafted Daniel Nāho'opi'i statement

### **News Bureau**

- Coordinated and/or assisted with the following interviews and statements, including:
  - LiAnne Yu, Hawai'i Business: DN, IG, Director Tokioka and CNHA's Kūhiō Lewis interviews on visitor push-back regarding traveling to Hawai'i and being told what to do. Drafted talking points. (September 5)
- Coordinated and/or assisted with the following media relations, including:
  - Allison Schaefer, Honolulu Star-Advertiser: Provided information regarding HTA's Legislative budget request. (September 13)

### **Community Initiatives and Public Outreach**

- HTUSA Aloha Market
  - Drafted HTA quote for inclusion in Mana Up video news release. (September 12)
- HTJ JTB Memorandum of Understanding Signing
  - IG drafted DN talking points for the Tokyo press conference on September 27. (September 25)
- Hotel Labor Negotiations
  - Monitored situation.

### **Internal Communications**

- Managed 2024 Communications Calendar on an ongoing basis.
- Conducted weekly communications calls with HTA leadership.

## Administrative

- Finalizing updated Public Affairs planning as we prepare to rescope and procure contracted support for Communications & Public Affairs Support Services, HTA Website Services, and production support for the Hawai'i Tourism Conference and Spring Tourism Update in the coming months.

### Government Affairs

The Public Affairs Office continues to monitor the impacts of newly enacted legislation from the 2024 Legislative Session, as well as proceedings at our county councils.

## III. DESTINATION STEWARDSHIP BRANCH

**Functional Statement:** The Destination Stewardship Branch is responsible for implementing projects and programs that seek to balance and meet the economic, environmental, and social/cultural needs of Hawai'i while working in close partnership with the visitor industry and residents.

### *Natural Resources Initiative*

**Overview:** Support programs that protect, maintain and enhance Hawai'i's natural resources and cultural sites to improve the quality of life for all of Hawai'i's residents and to enhance the visitor experience in alignment with the Authority's mission to strategically manage Hawai'i tourism in a sustainable manner consistent with economic goals, cultural values, preservation of natural resources, community desires, and visitor industry needs. The [HTA's Five-Year Strategic Plan 2020-2025](#) lays out the Natural Resources Pillar objectives to "encourage and support sustainable and responsible tourism; engage and encourage active natural and cultural resource management strategies in areas frequented by visitors; and to promote visitor industry alignment with the Aloha+ Challenge, Hawai'i's recognized model to achieve the UN's SDGs, especially for energy and water."

No Kahu 'Āina projects/events to report on the month of September. Most awardees have already been monitored.

### *Hawaiian Culture Initiative*

**Overview:** Support programs that perpetuate and recognize the uniqueness and integrity of the Hawaiian culture and community and their significance in differentiating the Hawaiian Islands through unique and genuine visitor experiences

### *Ma'ema'e Program*

In the Hawaiian Culture pillar of the current Hawai'i Tourism Authority Strategic Plan, one of the Milestone Measures for Objective 4 calls for the establishment of a system for measuring and reporting the number of lodging industry entities with on-site cultural practice programs and practitioners. HTA recently awarded contract PON 24025, to the Native Hawaiian Hospitality Association (NaHHA) for the professional services of developing a comprehensive database to accurately identify and update contact information for Native Hawaiian Cultural Practitioners, Organizations and Visitor Industry Partners. This Hawaiian Culture Database will be owned and managed by the Hawai'i Tourism Authority with results to be tracked and reported annually. The contract was fully executed on June 4. The project has made substantial progress in the month of September and is currently in the final stages.

### *Kūkulu Ola Program*

The Hawai'i Tourism Authority's Kūkulu Ola Program, consistent with Chapter 201B-7(a) of the Hawai'i Revised Statutes ("HRS") which allows HTA to "enter into agreements that include product development and diversification issues focused on visitors"; and Chapter 201B-7(5), which gives the HTA responsibility for "perpetuating the uniqueness of the native Hawaiian culture and community, and their importance to the quality of the visitor experience, by ensuring that Hawaiian cultural practitioners and cultural sites that give value to Hawai'i's heritage are supported, nurtured, and engaged in sustaining the visitor industry"; and Chapter 201B-3(a)(20) which states that HTA "may coordinate the development of products with the counties and other persons in the public and private sector, including the development of sports, culture, health and wellness, education, technology, agriculture, and nature tourism. In addition, the HTA Five-Year Strategic Plan 2020-2025 lays out HTA's plan to support Hawaiian Culture as stated above.

Kula Kapa O Waimanalo took place on September 15, 2024 at Sea Life Park. Kula Kapa, in partnership with Sea Life Park, offers kapa making workshops near the children's play area. Park visitors and their children are taught how to prepare kapa from beginning to end, starting with scraping the wauke with an opihi shell, using the hohoa to pound the mo'omo'o on the kua pohaku. In-depth explanation of terminology is provided by the kumu and the 'ike kupuna is shared through verbal commands and demonstration. Participants walk away with a starter piece of kapa and the know-how to add on. Event organizers shared their vision to expand their partnership with the park, including the planting of trees on property, whereby everything needed to carry on the tradition of kapa-making can be sourced at the park.

### **Visitor Experiences Initiative**

**Overview:** The primary objective is to enhance the visitor experience while also preserving and promoting Native Hawaiian culture in addition to Hawai'i's multi-ethnic cultures and communities. This is achieved by fostering genuine, respectful, and accurate visitor activities and programs that connect tourists with the rich heritage of Hawai'i, all while supporting local cultural practitioners, artists, and craftsmen to ensure the preservation and perpetuation of Hawaiian culture and the local culture of Hawai'i.

### **Signature Events Program (SEP)**

The HTA's Signature Events program supports major events that have broad appeal and align with Hawai'i's destination's image and brand. These world-class events help Hawai'i to remain competitive, generate media exposure for Hawai'i, increase economic benefits and ensure tourism and communities enrich each other. Signature Events aim to attract attendees and participants from outside the state of Hawai'i with extensive national and international marketing and have a significant economic impact as measured by the number of out-of-state participants. The program seeks to support and strengthen existing events and create new events for both residents and visitors.

Event Name	Organization	Island	Award Amount	Summary
Aloha Festivals 2024	Aloha Festivals	O'ahu	\$100,000	The Aloha Festivals is perhaps Hawaii's longest-running cultural festival, spanning over 75 years, and features events like the Royal Court Investiture, Waikiki Ho'olaule'a, and floral parade. Targeting residents and visitors, the events throughout the month of September promote authentic Hawaiian cultural experiences by honoring our royal history. Brand Hawaii as a premiere entertainment destination. Engages the state-wide community who descend on Waikiki each year to enjoy the majesty of decked out floral floats, pa'u riders, and marching bands. The floral parade is a family tradition for many spectators and participants, evidenced by the several thousand attendees. The floral parade was

				<p>very interactive this year as parade participants gave out lei to bystanders. The enthusiasm from visitors was palpable. These events align with HTA's desire to increase interest in Hawai'i's unique history and traditions.</p>
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Community Enrichment Program (CEP)

The Community Enrichment Program fosters community-based tourism projects that improve and enrich Hawai'i's product offerings. These projects provide unique, authentic, and highly valued visitor experiences and represent activities developed by our community, for our community, and that the community wants to share with our visitors.

Event Name	Organization	Island	Award Amount	Summary
2024 Ride Aloha Festival	Hawaii Bicycling League	O'ahu	\$20,000	<p>The 2024 Ride Aloha Festival took place from September 27 – 29, 2024. It kicked off with a Welcome Dinner on Friday and included the Honolulu Century Ride, Aloha Fun Ride and Finish Line Festival at Kapiolani Park. The Ride Aloha Festival is Oahu's largest non-competitive cycling event for both experienced riders and youth. Participants comprised a mix of residents and visitors from Japan and the US as noted by surveyors. Attendance was also tracked through ticket sales. Post-event surveys went out to all registered participants and additional surveys accompanied professional photos of riders crossing the finish line. Event was well organized and staffed and accommodated each level of participation – from bike riders to bystanders. Ilihia gave opening remarks and highlighted improvements to the park and roadways for public enjoyment. Kumu Hina Wong delivered a welcoming chant. Festival offered a wide selection of food and craft vendors and live entertainment.</p>



Visitor Assistance Program (VAP)

**Overview:** HTA’s Visitor Assistance Program (VAP) provides support, resources and guidance to visitors who are victims of crime and other adversities while traveling in Hawai‘i. Services include providing phone cards, transportation, meals, hospital visits and moral support, replacing lost IDs, assisting with hotel and airline bookings, and more. Under HRS 237D-6.5(b)(2), HTA, at a minimum, is required to spend 0.5 percent of the Tourism Special Fund on safety and security initiatives.

**September Stats:**

County	No. of Cases Handled	No. of visitors served	Primary Visitor Market(s) Served	Industry \$\$ Contributions
Hawai‘i	13	28	US East & West	\$91 (cash) \$7,549 (In-Kind)
Honolulu	27	57	US West & East, Japan, Canada, Oceania, Korea, China	\$23,629.99.00 (cash) \$9,898.77 (In-Kind)
Kaua‘i	13	28	US West & East	\$91 (cash) \$7,549.00 (In-Kind)
Maui	11	22	US West & East	\$8,400.00 (In-Kind)

Ho‘okipa Malihini Program

Ho‘okipa malihini means to welcome guests and as its name suggests, this program will enhance the visitor experience and resident-visitor interaction. Programming includes cultural programs and entertainment in various resort and visitor areas statewide that support Hawaiian programs and cultural practitioners, craftsmen, musicians, linguists and/or other artists to help preserve and perpetuate Hawaiian culture in a way that is respectful and accurate, inviting, and educational. The program will directly support the Hawaiian community and cultural practitioners by creating opportunities to involve them in the industry with industry partners and visitors. While some resort/hotel areas have cultural directors this program helps to reinforce our collective kuleana to Mālama Hawai‘i.

**Resort Area Hawaiian Cultural Initiative (RAHCI)**

HTA’s Resort Area Hawaiian Culture Initiative provides support to cultural practitioners and musicians who present Hawaiian experiences, entertainment, and music in resort areas.

No RAHCI/HMI events monitored in September. Most on-going performances were monitored at the beginning of the year.

**Kāhea Greetings Program (Airports And Harbors)**

Programming includes regularly scheduled, free, year-round entertainment to create a Hawaiian sense of place for the millions of visitors entering Hawai'i through our airports and harbors statewide.

Entertainment is regularly scheduled at airports. Below is the programming schedule at each airport for September:

Airport	HNL	OGG	KOA	LIH	ITO
<b>Schedule</b>	Tues & Thurs 9:30am- 1:30pm	Sundays 10:00am- 2:00pm	None	Fridays 10:00am - 2:00pm	Mondays 11am – 3:00pm

Greetings are provided at harbors as ships arrive. Below is the report on greetings in September:

Harbor/Pier	Hilo	Kona	Nāwiliwili
<b>Ships Greeted</b>	6	8	5
<b>Passengers &amp; Crew Greeted</b>	20,800	27,976	12,775
<b>Visitors Served</b>	10,400	10,528	12,775
<b>Paid Staff</b>	1	1	2
<b>Paid Musicians &amp; Cultural Practitioners</b>	3	8	18

*Post-Arrival Messaging*

Finalized the Maui Recovery Visitor Education & Post-Arrival Marketing campaign as part of HTA’s larger recovery initiatives in response to the Maui Wildfires. All four channels of Visitor Education and Post-Arrival Marketing – Native Ads, Digital Display, Search Engine, Social Media – are tracking well to KPIs established by our Destination Stewardship contract. The click-thru rate of social media is tracking higher than anticipated which is a favorable metric. We will be reporting specific KPIs for this quarterly. Please see the Destination Stewardship appendix for more details on this topic.

No significant updates for September.

*Smart Tourism*

HTA staff has asked Kilohana to pause on this part of their work while HTA evaluates how to proceed given the Maui wildfire and other factors. HTA Staff worked with

Kilohana to reach agreement that the contract will be reduced by \$1,200,000 since this work was paused and removed from the scope. A change order and supplemental contract will be done once everything is finalized.

### ***Destination Management***

HTA staff are working with the island destination managers on their close-out reporting on the first phase of the DMAPs. Further, the destination managers continue to meet with community organizations and stakeholders to share the work we have done and plan to move forward.

### ***Technical Assistance & Capacity Building***

HTA staff is working with Kilohana on digesting and using the data from the technical needs assessment to inform the development of the content and format for the three community tourism collaboratives. We anticipate they will launch in Q3 2024 and focus on Foundational Technical Assistance, Community Stewardship and Regenerative Experiences.

### ***Tour Guide Certification***

HTA contracted Kilohana by CNHA to develop a curriculum for an online Tour Guide Certification training program, including modules on Hawaiian culture, Hawai'i's history, customer service, and safety issues. The HTA staff and Kilohana are working on meeting with UH and other critical stakeholders on the development of the curriculum. The timeline for the project has been adjusted from the original timeline in their proposal to have the draft curriculum submitted by 9/30/24.

## **VI. BRAND BRANCH**

**Functional Statement:** The purpose of the Brand Branch is to strengthen tourism's overall contribution to Hawai'i by taking the lead in protecting and enhancing Hawai'i's globally competitive brand in a way that is coordinated, authentic, and market appropriate. This includes the oversight of the implementation of annual brand marketing plans in select major market areas (USA, Japan, Canada, Oceania, Korea, China, and Europe), sales & marketing for single property and city-wide global meetings, conventions and incentives or MCI, Global Support Services which includes management of a digital assets library, social media tools, and the gohawaii.com consumer website, affiliate sites, and application, Island Destination Brand Management & Marketing with representation and expertise provided in each county of Hawai'i, and sports programs.

## ***Major Market Destination Brand Management***

**Overview:** This initiative focuses on destination brand marketing for leisure travel in seven major market areas with pre-arrival communications to educate visitors with information about safe, respectful, and mindful travel within the Hawaiian Islands. Another key emphasis of the initiative is to drive visitor spending into Hawai'i-based businesses to support a healthy economy, including supporting local businesses, purchasing Hawai'i-grown agricultural products, and promoting Hawai'i-made products in-market, in partnership with the state's Department of Business, Economic Development & Tourism (DBEDT) and the private sector.

### **US Major Market Area**

- In September HTUSA engaged the Los Angeles market with a comprehensive LA Market Saturation that demonstrated the critical role of targeted efforts in addressing market shifts and driving recovery. This activation included paid media (beginning on September 1, 2024) with social media already meeting or exceeding targets. Preliminary data for September shows Facebook impressions at 5.8M (target is 10,456,279 for September – October), Instagram at 4.9M impressions (target is 3,301,983 for September – October), and TikTok impressions at 4.6M (target is 3,843,988). As a result of the media blitz on September 17-19, public relations generated 36,513,073 impressions across 28 media placements. Travel trade education that ran from September 17 through October 16 drew nearly 2,000 advisors. Pop-up events also did well with the Aloha Market LA on September 20 – 22, which was attended by 9,328 people who were exposed to 54 Hawai'i brands and over 600 different local products from Kaua'i, O'ahu, Maui and the island of Hawai'i. Fifteen businesses completely sold out of their products and 10 businesses sold out of one or more of their products. So far, the campaign's cooperative marketing programs that will run from September 16 through November 15 has maximized the impact of key statewide partnerships with contributions totaling upward of \$490,000. The final results of this saturation will be available next month.
- For Meta, 12 organic posts were planned for Q3, but a total of 32 posts went live — which contributed to higher impressions and performance. On Facebook in particular, the Maui Strong post in August was the top performing organic piece of content in Q3. Overall, the posts from "The People. The Place. The Hawaiian Islands." series performed well and generated overall positive audience sentiment across both paid and organic social. Furthermore, posts focusing on local Hawaiian food also generated positive engagement on organic social. "The People. The Place.

The Hawaiian Islands.” post featuring ambassador, Chef Kyle Kawakami, received the second greatest number of organic impressions in Q3, and the organic post featuring various iconic Hawaiian foods ranked second in terms of number of comments in Q3.

- In response to Governor Josh Green’s 17<sup>th</sup> proclamation pertaining to the Maui Wildfires, the HTA staff also executed PON 25014 (US Marketing Maui Recovery Plan 3) recently approved by the HTA Board to implement a partnership program from mid-October through November 2024 that will drive qualified consumer traffic to the Hawai’i Special Offer destination landing page highlighting the island of Maui and promoting statewide partner offers.

### Canada Major Market Area

- The Kauai Visitors Bureau conducted a live webinar on September 18<sup>th</sup> with key partner Baxter Media. Over 25 agents attended virtually. All webinars with Baxter Media are strongly promoted. Additionally with Baxter Media - an email campaign was distributed to agents, specifically about travel to Moloka’i and Lana’i as part of HTCAN’s activities. These emails also encouraged enrollment into the Destination Specialist program.
- September is historically a busy month for Travel Trade activities. HTCAN participated in four agent-focused shows and conducted two in-person training sessions with over 1600 agents in attendance across the events that spanned from Calgary and Edmonton, Alberta; and in Hanover, Waterloo and Toronto, Ontario.
- HTCAN Hosted a group fam on Maui and O’ahu mid-September. The itinerary included a visit to Haleakalā National Park, a dolphin watch sail, visits to the Bishop Museum and ‘Iolani Palace, backstage visit to the upcoming ‘Auana by Cirque du Soleil show and the mālama experience at Kipuka Olawalu.

### Japan Major Market Area

- In September, HTJ continued its advertising efforts for the Yappari Hawai’i campaign across out-of-home (OOH), digital, and print platforms, aiming to promote Hawai’i as a premier overseas travel destination. The campaign garnered over 59 million impressions this month, with notable contributions from OOH in Sapporo, Tokyo, Nagoya, Osaka, and Fukuoka (48mil), social media (5.7mil), YouTube (1.38mil), Google Web Banner (2.88mil), Tver & Abema Online TV (292K), In-Flight Monitor: (6mil) and Print (350K). Additionally, Yappari Hawai’i video was broadcast on JAL’s

domestic flights reaching an audience of 1,965,060 individuals, while ANA's international and domestic flights reached 4,150,000 people in September.

- HTJ participated in the JATA Tourism EXPO 2024, which took place in Tokyo from September 26 to 29. Under the booth theme “Yappari HAWAII (It gotta be HAWAII)” , HTJ showcased signature attractions from the four major islands of Hawai'i through the “Aloha Balloon VR” experience. Among 1,384 exhibitors, HTJ was honored with the No. 1 Travel Professionals' Choice Booth Grand Prize, effectively highlighting the beauty of Hawai'i to the Japanese market in a meaningful and impactful manner. The event attracted a total of 182,900 visitors.
- From September 24 to 28, three Senators and three Representatives from the Hawai'i State Legislature, along with HTA Board Members and the HTA President & CEO, traveled to Japan to participate in various events and meetings aimed at promoting Hawai'i. The HTA President & CEO was invited to serve as a panelist at the JATA Tourism EXPO Japan 2024, which celebrated the U.S.-Japan Year of Tourism Exchange. On September 25, HTJ organized a seminar and networking event for the media, which was attended by 18 partner companies from Hawai'i, totaling 30 participants, along with 94 media representatives from Japan. In the evening, HTJ hosted a VIP dinner that welcomed 110 attendees, including all Hawai'i partners.

### Oceania Major Market Area

- Hawai'i Tourism Oceania successfully concluded Aloha Down Under 2024, an annual roadshow with events in five cities across Australia and New Zealand from September 16<sup>th</sup> – 24<sup>th</sup>. Over 500 travel advisors, media and B2B attended. They engaged with 13 leading suppliers while enjoying live performances, Hawai'i-inspired cuisine, and chances to win holiday packages. This year, HTO added an exclusive luxury agent luncheon with selected partners - which was very well received.
- HTO announced an incentive program that is a partnership with Hawaiian Airlines - Offering travel agents from Australia and New Zealand the chance to participate in a fam trip to O'ahu and Kaua'i this November. Interest has been strong from Oceania trade. Participants will not only gain invaluable insights, but also enhance their ability to sell Hawai'i destinations confidently to their clients.
- HTO facilitated an interview with Graeme Kemlo from Travel Writers Radio, featuring Chef Roy Yamaguchi and Kristen Lau-Grover, Director of Marketing & PR for the Hawai'i Food & Wine Festival. The discussion explored modern Hawaiian cuisine,

with a focus on the importance of sustainability in ingredient selection and highlighted the significance of the Hawai'i Food & Wine Festival.

### *Korea Major Market Area*

- HTK and Lotte Tour successfully concluded the romance promotion titled "We Love Hawai'i - Honeymoon for Our Special Start" at the end of August. This initiative featured an Aloha welcome basket, a mini snap photo shoot, and a 96-hour rental car with full insurance coverage. Aimed at mindful honeymooners, the promotion encouraged visits to the Neighbor Islands and participation in Mālama activities. It was promoted through various channels, including a main banner on the website, social media platforms, KakaoTalk Channel advertisements, and Lotte Tour partners' channels, resulting in a total of 116,935 impressions.
- In collaboration with Korean Air, HTK also executed the My True Aloha Promotion from August to September. This promotion encompassed four key sections: it provided essential information about the six Hawaiian Islands; highlighted Hula and Lei as distinctive elements of Hawaiian culture; showcased "Made in Hawai'i" cuisine - featuring dishes such as Poke, Lomi Salmon, Loco Moco, and Musubi; and introduced various festivals, including the Aloha Festivals and the Hawai'i International Film Festival. The promotion page was linked to HTK's YouTube channel, Aloha TV, featuring the video clip "The People. The Place. The Hawaiian Islands" with Korean subtitles. Promotional efforts included SNS, eDM, App Push, Skypass clients e-newsletter, and both GDN PC and mobile ads, achieving total ticket sales of 2,167 and a remarkable 11.4 million impressions.
- Hawai'i's Lieutenant Governor Sylvia Luke led a delegation of seven members to Korea, where they engaged with government tourism officials, key players in the travel trade, and airline executives to strengthen ties and boost outbound tourism to Hawai'i. This trip underscores the state's commitment to fostering international partnerships in the tourism sector. Organized by HTK, the meetings with airline executives focused on promoting the ICN-HNL route, expanding air connectivity to Hawai'i, and developing strategies to attract mindful Korean tourists. The delegation included DBEDT Director James Kunane Tokioka, CNHA Chief Executive Director Kūhiō Lewis, and Hawai'i Tourism Authority CEO Daniel Naho'opi'i.

### *China Major Market Area*

- HTC participated in the 6th Annual Grand Canal Cultural Tourism Expo in Suzhou from September 12-15, hosted by Brand USA and the Jiangsu Provincial Department of Culture and Tourism. HTC had a booth alongside Brand USA, where

it showcased information about the Hawaiian Islands. The Expo featured over 5,000 exhibitors, representing 66 cities, 38 countries and regions, and 653 enterprises and public service units. Approximately 130,000 attendees visited the exhibitions. The online segment of the Expo included more than 3,000 exhibitors and 730 buyers, facilitating online consultations and communications. The online Expo page received over 247 million visits.

- In September 2024, HTC published multiple articles across its social media platforms, including Weibo, WeChat Official Account, WeChat Video Channel, Douyin, and Xiaohongshu. One article highlighting a Mālama adventure tour on the Island of Hawai'i garnered significant attention. It provided an overview of the Island of Hawai'i, featured the legendary coastline of Keauhou Bay, detailed environmentally friendly night diving with Anelakai Adventures, described hiking in Hawai'i Volcanoes National Park, and included visits to King's Pond at Four Seasons Hualalai to observe marine life and O.K. Farms to explore tropical fruits. Another well-received article introduced the Aloha Festival and the various cultural activities available to visitors at the event.
- The XIAO Elevator MICE group from Hangzhou, consisting of approximately 400 participants, has been confirmed. HTC collaborated with Marriott Hawai'i and Japan Airlines to secure hotels, flights, and welcome activities through Meet Hawai'i during the proposal phase. Additionally, HTC coordinated with the U.S. Embassy and Consulates to facilitate visa process, providing welcome letter from HTA & HTC as supporting document. This group will be staying on O'ahu and we worked closely with IVB and local ground operator to provide itinerary recommendations and support.

### Europe Major Market Area

- Hawai'i Tourism Europe's co-op campaign with DERTOUR Germany kicked off in August, aiming at increasing awareness and bookings for the Hawaiian Islands. The campaign, running from August to November, utilizes a variety of channels, including social media, podcast, print mailings, and digital signage, to engage both B2B and B2C audiences. The campaign includes social media posting templates for travel agencies, a homepage teaser on DER Touristik's B2B portal, and targeted Instagram posts. The initiative is designed to enhance visibility during the peak booking season in early 2025.
- From September 1 to 12, HTE hosted 2 IVBs, 6 Hawai'i suppliers & 2 airlines during Aloha Europe Travel Mission 2024 which took place across Germany, Switzerland



and the UK. This event spanned six cities and facilitated meetings and networking events with 386 product managers, media and travel agents. Additionally, two Hawaiian cultural practitioners presented Hawaiian music and hula and shared insights about the meaning of Aloha with audience.

- HTE has been preparing for the Mālama Hawai'i campaign, set to launch in October for Germany in partnership with Hawaii.de and in November for the UK in partnership with Audely Travel. This campaign targets affluent travelers who are socially and environmentally conscious, highlighting ways they can integrate Mālama Hawai'i experiences into their holiday activities in the Hawaiian Islands.

### ***Cruise Market***

Each year HTA hosts a Hawai'i Executive Cruise Fam. This year in September, HTA and consultant Access Cruise, Inc. hosted cruise partners who maintain operations locally - who could make an immediate impact for local cruise community stakeholders. The participants were key decision-makers and influencers from Norwegian Cruise Line and Carnival Cruise Line corporate offices. Their responsibilities include creating and selling products to cruise guests. The cruise fam included visits to the four major islands with five port inspections. Visits included O'ahu, Kaua'i, Island of Hawai'i and Maui. The port inspections included Honolulu Harbor (Pier 2, Piers 10 & 11), Nāwiliwili Harbor, Hilo Harbor, Kailua-Kona and Kahului Harbor. All cruise lines participants were either first-timers to Hawai'i or hadn't been to the islands in quite some time. Everyone was enchanted by the Aloha spirit resonating from the history and culture of locals. Each observed the connection people have to the land and culture. Cruise fam participants also met with multiple local tour operators and various local businesses.

### ***Global Meetings, Conventions & Incentives***

**Overview:** The MCI market can become a critical source of profitable "base" business booked years in advance. This base of business enables a higher yield of shorter-term leisure business. It can also help fill hotel occupancy gaps in future years by capitalizing on off-peak opportunities. To be competitive and thrive in the changing world of business tourism (MCI market), Hawai'i must capitalize on its strategic mid-Pacific location, which conveniently connects East and West, helping organizations create business events that are international, engaging and memorable experiences. Our location also contributes to a unique experience and the group setting of these meetings, conventions and incentives allows us to further educate our markets about Hawaiian culture and our precious resources by immersing attendees and stakeholders

in these activities. Primary focus is on MCI sales and marketing in the United States, Japan, Canada, Oceania, Korea, and other Asia markets as appropriate.

### Sales & Marketing Efforts:

- Meet Hawai'i's Northeast team has been actively engaging with key meeting planners through strategic outreach. They hosted a virtual presentation for approximately 20 professionals from Association Headquarters and exhibited at the Philadelphia PCMA Chapter tradeshow, which attracted nearly 175 attendees, including about 60 qualified planners. These engagements provided valuable opportunities to educate potential clients about the Hawaiian Islands' offerings, emphasizing mindful tourism practices. The team highlighted how this approach allows attendees to appreciate Hawaiian culture deeply while contributing to the preservation of the islands' natural resources, aligning with Meet Hawai'i's commitment to sustainable tourism.
- The next three months are crucial to our success in meeting the end-of-year goals. Recently the Meet Hawai'i team and its partners were in Las Vegas for IMEX America. In November, they will engage in the Destination Hawai'i and Citywide FAM, and a digital marketing campaign targeting incentive business will run through the end of the year. The team will also launch incentives to MCI businesses, targeting 2025 business to all islands.
- **Citywide:** The citywide team is inching toward meeting their final numbers. A big win for the team was closing a significant short-term opportunity in 2027.
- **Single Property:** The launch of a new incentive campaign is helping the single property sellers to create and close opportunities for 2025 by the end of this year. Imex always helps to generate the momentum needed to close out the year. IMEX results will be available next month.
- **List of September Sales Activities:**
  - Client promotional events
    - September 2-6, 2024 – Sales Calls with HA to MICE Travel Agencies – Virtual
    - September 4-5, 2024 – ConferenceDirect Pre-Planning Meeting – Wailea, Maui
    - September 9-12, 2024 – Site Classic 2024 Launch of 2025 to Maui – Miami, FL
    - September 15-19, 2024 – HPN Partner Conference – Houston, TX

- September 25, 2024 – MPINE Networking Event – Boston, MA
- September 26, 2024 – Client Meeting HCUL and site A&I Rommy Kopp (ML) – O’ahu
- Educational events and trade shows
  - September 11-12, 2024 – PCMA Philadelphia Tradeshow – Philadelphia, PA
  - September 11-13, 2024 – PCMA PHL Education Day – Philadelphia, PA
  - September 12-13, 2024 – CAPA Airline Leader Summit Australia Pacific 2024 – Brisbane
  - September 27, 2024 – Hospitality Summit – San Jose, CA
- Sales blitzes
  - None to report for this month.
- September site visits and familiarization (FAM)
  - O’ahu – 1
  - Island of Hawai’i – 1

### ***Island Destination Brand Management and Marketing Services***

**Overview:** The Island Destination Brand Management and Marketing Services (IDBMMS) include the support from on-island representatives on behalf of HTA for visitor education, visitor industry engagement, and public relations activities; serving as advisors to HTA on the respective islands and The Hawaiian Islands statewide brand; collaborating with HTA’s Global Marketing Team to develop and implement familiarization trips and press trips to areas that are welcoming visitors; providing island-based visitor education support during promotions, trade shows, and missions in major market areas, and coordinating with city and county government officials and designated organizations during crisis management situations.

- The supplemental contract to exercise an option has been executed.
- In the month of September, the Island Chapters supported 10 promotions, trade shows and missions; 39 destination trainings and educational sessions; and provided 32 destination consultation services. The following programs are examples of what the Island Chapters engaged in:
  - OVB and KVB attended HTE’s Aloha Europe Mission on September 2-11. The mission included key tour operator/wholesaler events in Frankfurt, Zurich, Chester and London where 33 product managers were engaged. Media events, including appointment style meetings in Munich and London. The team also met with two trade media from Zurich at a travel trade event where about 27 media were engaged. Travel trade educational training events in Frankfurt, Stuttgart and Munich in Germany, Zurich in Switzerland, and

- Manchester and London in the UK where about 300 travel advisors and professionals were engaged.
- IHVB and OVB engaged in HTE's UK Media FAM on September 15-22 and provided itinerary guidance and development, restaurant recommendations, connected HTE to industry partners, and reservations (as needed). OVB also supported by booking 'Iolani Palace and Bishop Museum, confirming hotel stay at Romer House Waikiki and Courtyard O'ahu North Shore. IHVB provided financial assistance for accommodation at Volcano House (media rate) and select activities. Purpose: to increase exposure of the islands in a responsible and regenerative manner while supporting industry. Media that attended included Teresa Machan, commissioned by The Telegraph and whose reach was 317,000 circulation and 17.2 million users online. Kara Godfrey, Deputy Travel Editor of The Sun, whose reach was the UK (1.2 million circulation) plus Scottish Sun (201,000 circulation and no. 1 newspaper) and Irish Sun (44,000 circulation) newspapers plus an online feature (23.5 million users). Ben Parker, Travel Editor of The Independent, whose reach was 21.1 million users. Finally, Cate McCurry, PA News syndicate; whose potential results were 8-80 articles in print and online with a reach of more than 1 million+.
  - MVCB and OVB engaged in HTCAN's Media FAM on Sept. 15-19 (Maui) and Sept. 20-23 (O'ahu). The teams provided itinerary guidance and development, and connected HTCAN with industry partners. MVCB also supported by making reservations with Unique Maui Tours for a Haleakalā experience and by facilitating a connection with Wailuku Small Town\*Big Art for a guided mural tour. OVB supported by soliciting hotels, made reservations at 'Iolani Palace and helped confirm HoMA, Lonohana and Bishop Museum (including lauhala weaving experience). The purpose was to increase exposure of the islands in a responsible and regenerative manner while supporting industry. Media in attendance included Linda Barnard, Cayman Marshall Collection Magazine with a reach of 150,000 circulation; Michael Morcos, Canadian World Traveler with a reach of 150,000 circulation and 275,000 online; Malik Cocherel, Le Devoir with a reach of 1,000,000 circulation and 1,178,000 online; and Corbin Lee, thetravel.com with a reach of 1,800,000.

### ***Global Support Services for Brand Management & Marketing***

**Overview:** The Hawai'i Tourism Global Support Services for Brand Management and Marketing support HTA's comprehensive pre- and post-arrival visitor education and

destination management efforts, as well as HTA's Global Marketing Team throughout the U.S., Canada, Japan, Oceania, Korea, China, and Europe. The support services include providing market insights to boost strategy, management and development of creative and digital assets, social media, website management, including GoHawaii.com, application development and maintenance, and maximizing emerging technology to support the updating of our Ma'ema'e Toolkit and Brand Guidelines. The resources are also shared broadly with the public for the community, visitor industry, businesses, media, travel trade, and meetings, conventions and incentives industry representatives to utilize in their respective areas.

- The Global Support Services team initiated a collaborative process by requesting all GMTs and Kilohana to submit their shot list preferences. This proactive approach aimed to ensure that the final master shot list incorporates diverse market needs and perspectives. Concurrently, the team distributed assets for "The People, The Place" campaign. The team completed a 3-island shoot in October on Kaua'i, O'ahu, and the island of Hawai'i and has begun ingesting still images, b-roll, and drone footage. The team will continue to make final selects and metadata for upload, which will be available in a few months.

## VIII. PLANNING & EVALUATION BRANCH

**Functional Statement:** The purpose of the Planning & Evaluation Branch is to strategically plan for the near, mid, and long-term health and vitality of our visitor industry and manage destination issues that affect communities and the visitor experience. This includes the development, monitoring, and oversight of various plans for the HTA including but not limited to the Tourism Functional Plan, Strategic Plan, Annual Strategic Tourism Management Plan, the Destination Management Action Plans (DMAPs), and the Tourism Management and Marketing Plan. Other activities include development of policy as it relates to tourism.

### *Planning*

DBEDT's Office of Planning & Sustainable Development held 2 meetings in September for its Hawai'i Economic Recovery and Resilience Project. The Director of Planning participated in both meetings.

### *Workforce Development Program*

Pursuant to HRS 201B-3(a)(22) HTA will address the industry's evolving needs in workforce training by working with educational institutions to make training available for

the industry workforce to help enhance overall skills and quality of service. Sustaining tourism's success also depends on Hawai'i's youth helping to carry the industry forward and becoming the next generation of leaders. Encouraging Hawai'i's high school and college-age students to choose tourism as their career is another important part of HTA's workforce development initiative in ensuring that there are career opportunities in the tourism industry for Hawai'i's own.

### *Ho'oilina Scholarship Program*

Staff has been in discussions with the University of Hawai'i at Mānoa to set up the next round of funding for the Ho'oilina Hawaii Scholarship program. This program funds five four-year scholarships public high school students graduates who enroll at the University of Hawai'i at Mānoa and declare a major in Travel Industry Management (TIM).

### *High School Motivational and Exposure Programs for Hawaii's High School Students*

HTA issued an RFP on September 17, 2024 to develop and execute the visitor industry career motivational program and HTA's Work Wise Program, a visitor industry workforce development program targeted at public high school students interested in summer 2025 part-time work. Proposals are due on October 18, 2024.

### ***Product Development***

**Overview:** Develop, lead, assess, and optimize the development of new products and experiences. Leverage data and research to identify opportunities and areas where the development of programming is needed.

### *EDA's Noncompetitive Travel, Tourism & Outdoor Recreation Grant*

Work continues with DLNR in managing and monitoring their contract for their 7 projects.

## **X. FINANCE BRANCH**

Contracts List: Pursuant to Hawai'i Revised Statutes §201B-7 (9), please note the below contracts executed during the month of September 2024.

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Contract No.	Contractor	Description	Contract Amount	Total Contract Value	Start Date	End Date
†25003	LA Clippers LLC	LA Clippers x HTA 2024	\$750,000.00	\$750,000.00	9/23/2024	6/30/2025
21019 S7	The Walshe Group Pty Ltd dba Hawaii Tourism Oceania	Hawaii Tourism Inbound Destination Marketing Management Services in the Oceania Major Market Area	\$966,818.40	\$5,216,818.40	9/24/2024	12/31/2025
25011	TLK Group, LLC dba Mobile IT Force	IT Support Services	\$54,659.66	\$54,659.66	9/25/2024	6/30/2025
24025 S1	Native Hawaiian Hospitality Association dba NaHHA	Ma'ema'e Program – Hawaiian Culture Database	N/A	\$13,000.00	9/25/2024	12/31/2024
25008	AVIAREPS Marketing Garden Holdings Ltd.	Hawai'i Tourism Destination Brand Marketing Services for the Korea Major Market Area	\$824,000.00	\$824,000.00	9/27/2024	12/31/2025
†21039 S4	Department of Transportation, Airports Division	Kāhea Program Airport Greetings	N/A	\$1,584,828.00	9/27/2024	9/30/2025
Contract Type: • Sole Source † Procurement Exemption ⊖ Emergency			\$2,595,478.06			

Other activities related to procurement, contracts, Hawai'i Convention Center, and Legislative Audit will be reported in the Budget, Finance, and Convention Center Standing Committee report at the HTA board meeting.



# HTA CEO REPORT

NOVEMBER 2024



## EXECUTIVE SUMMARY

The Hawai'i Tourism Authority (HTA) provides this report as a resource to the Board and the public to better understand the activities and actions taken by the team in the month of October 2024 in support of the organization's overall mission, its strategic plan, and the community-led Destination Management Action Plans.

Office of the President & CEO: Recruitment for vacant positions was ongoing while continuing to process the proposed reorganization plan through DBEDT and DHRD. Of the HTA's 30 approved positions there are currently 10 vacant positions including the CEO and Chief Brand Officer. Seven positions were in the recruitment process

Destination Stewardship: Overall, October was a busy month for the team, focusing on events, collaborations, and expanding the team. included the Hawaii Tourism Conference and the 44<sup>th</sup> Annual Hawaii International Film Festival as well as other Signature and Community Enrichment events. HTA staff worked closely with Kilohana to continue the Community Tourism Collaboratives, Foundational Technical Assistance Programs, and Curator program. October also saw the expansion of our Stewardship team by filling several critical vacancies. HTA welcomed, on October 7, 2024, Ms. Mei-Lin Bruhn as our Administrative Assistant. Then on October 16, 2024, we welcomed Destination Managers Patti Ornellas (Kaua'i) and Meagan DeGaia (Maui/Lāna'i) to the HTA Destination Stewardship Team. Recruitment for the vacant Destination Manager positions (O'ahu, Hawai'i island, and Moloka'i) is ongoing.

Brand and Marketing: Following the conclusion of the HTA Tourism Conference, the brand team reached out to Brand USA to follow up on partnership opportunities for two initiatives: a promotion with Expedia and an update of the Hawai'i section on VisitTheUSA.com. The Expedia promotion, which will run for the remainder of this year and into the first quarter of 2025, targets Japan, Canada, and Oceania to encourage short-term bookings from these markets. Updating the website is essential to ensure that international visitors and travel professionals have access to the most current and relevant information, aligning with HTA's commitment to regenerative tourism. This month, the team also worked on the HTA annual report, providing updates and measures for FY2024 activities. During this time, HTKorea and HTCanaida carried out travel missions in their respective markets. MVCB also held its 37<sup>th</sup> annual meeting while celebrating its 59<sup>th</sup> anniversary!

Planning and Evaluation: A significant portion of the planning team's efforts in October was planning and coordinating the "Bows vs. Silverswords" basketball exhibition games and Keiki clinic, which took place on November 1 and 2 in collaboration with the County of Maui and the University of Hawai'i at Mānoa Athletic Department. Staff also met with the state auditors throughout the month and prepared documents per their request. Efforts also took place to finalize contracts/supplemental agreements for the Ho'oilina Scholarship Program and KCC's Culinary Institute of the Pacific.

## II. OFFICE OF THE PRESIDENT & CEO

**Functional Statement:** The Office of CEO is responsible for implementing the policies and instructions of HTA's Board of Directors and administering the activities of HTA by planning, organizing, directing, coordinating and reporting its work.

- Leads relationship with Governor, Legislature, Board and state agencies
- Leads relationship with national tourism policy and strategy, Congressional offices, and national and international industry organizations
- Oversees HTA's strategic direction and performance
- Oversees HTA's administration, resource allocation, vision, and culture

### *Duties of the CEO*

- Various presentations at the HTA Tourism Conference: Welcoming remarks and Branding and Marketing overview.
- Conducted internal partners meeting and work sessions with GMTs, Kilohana, Anthology.
- Participated in various LA Clippers events including the support of 'Ānuenue Schools new Computer Lab and Courts.
- Worked with Senator Chris Lee and State Foundation Culture and the Arts to form the State Parks Branding Working Group. HTA has been selected by the Senator as a working group member.
- Meeting with Senator Troy Hashimoto on Maui recovery efforts and future plans.
- Meeting with DBEDT Deputy Director to discuss annual reporting materials and preparation for legislative hearings
- Senate EET Informational Briefing
- Meeting with Representative Quinlan regarding support of proposal for Ctrip annual meeting 2025
- Meet & Greet with FIN budget analyst (with other DBEDT agencies)
- Recorded interview with KITV on international visitors

- Recorded interview with NHK – the shift in tourism strategy towards destination stewardship

### ***Proposed Reorganization***

The HTA organization continued to transition into the structure presented and approved by the HTA Board at its July 2023 meeting. The objectives of this structure were to strengthen island-based management, increase resources for destination stewardship, and have dedicated leadership for branding and marketing. The Request to Reorganize documents were sent by DBEDT to HGEA for review then will be returned to DBEDT for approval. Of the HTA's 30 approved positions there are currently 10 vacant positions including the CEO and Chief Brand Officer. Seven positions were in the recruitment process (Destination Managers [3], Account Clerk III, Brand Manager – Sports, Contracts and Administrative Manager, and Planner), one was in process of approval with the Director (Brand Manager), and the CEO and Chief Brand Officer were not being processed at this point until the Board PIG has provided their report. Recently hired were two experienced Destination Managers who worked under contract with the DMAP program: Patti Ornellas – Kaua'i and Meagan De Gaia – Maui.

### ***Maui Wildfires Recovery***

HTA staff continues to focus on tourism's support for Maui's overall recovery following the August 8, 2023 wildfires. Pursuant to HRS §201B-9, a gubernatorially-declared tourism emergency is in effect until November 16, 2024 by order of the 17th Proclamation Relating to Wildfires. Approved by the board on October 3, 2024, the following projects were worked on:

#### ***Kinipōpō Hīna'i ma Pukalani***

In collaboration with the County of Maui and the University of Hawai'i Athletic Department, staff coordinated the Kinipōpō Hīna'i ma Pukalani "Bows vs. Silverswords" basketball exhibition games, reception, and Keiki clinic on November 1 and 2. Other partners included Outrigger Resorts & Hotels, Kamehameha Schools, Polynesian Adventures, Lahainaluna High School, and Chaminade University. These events aimed to bring Maui residents together and promote recovery through sports.

#### ***HTUSA Marketing Maui Recovery Plan 3***

HTUSA will use \$100,000 toward a fall Maui recovery campaign that stimulates travel to Maui and continues to support local businesses by driving engagement and bookings to

a special offers page through targeted marketing efforts. This campaign started in October with a pause for elections and resumed in mid-November, and will go through Thanksgiving. Some of the offers include accommodation, transportation and activities discounts. A report will be provided in the next CEO report.

## ***Public Affairs***

### **Hawai'i Tourism Conference (September 30 – October 2)**

- Drafted and distributed the following HTA post-event communications.
  - News Release: Hawai'i Tourism Authority Presents 2024 Tourism Legacy Awards to Kaua'i's Hamura Saimin and Renowned Chef Sam Choy (October 2)
  - E-Blast: Mahalo for Joining Us at the 2024 Hawai'i Tourism Conference (October 11)
  - E-Blast: Reminder! Share Your Feedback on the 2024 Hawai'i Tourism Conference (October 23)
- Coordinated and/or assisted with the following interviews and media relations, including:
  - Yunji de Nies, Hawai'i News Now Spotlight Now: Interviews with Chair Hannemann and Kalani Ka'anā'anā. Drafted talking points. (October 1)
  - Hugh Gentry, KITV: Interview with Chair Hannemann at Hawai'i's Culinary Scene reception. (October 1)
  - Jennifer Brink, KHON: Interview with Chair Hannemann at the Tourism Legacy Awards Luncheon. (October 2)
  - Catherine Cruz, Hawai'i Public Radio: Interview with DOE Deputy Superintendent Tammi Oyadomori-Chun regarding workforce development panel. (October 2)
  - Jason Genegabus, Hawai'i Hospitality: Provided links to recorded keynotes and presentations. (October 7)
  - Christine Hitt, Travel Weekly: Provided links to recorded keynotes and presentations. (October 8)
- Edited emcee script for the Tourism Legacy Awards Luncheon. (October 2)
- Managed videographer/photographer on-site. (September 30-October 2)
- Assisted with updating website with recorded video links and presentations.

### **News Releases/Reports/Announcements**

- News Release: Hawai'i Tourism Authority Announces Curator Certification of Japan's Three Largest Tour Operators (October 3)
- News Release: Hawai'i Tourism Authority and Meet Hawai'i Execute Three-Year Partnership with JTB to Attract High-Value Business Events from Japan (October 15)
- Report: Hawai'i Hotel Performance Report for September 2024 (October 24)
- News Release: Hawai'i Tourism Authority, County of Maui and UH Bring Collegiate Basketball to Maui (October 24)
- Report: Hawai'i Vacation Rental Performance Report for September 2024 (October 29)

### News Bureau

- Coordinated and/or assisted with the following interviews and statements, including:
  - Allison Schaefers, Honolulu Star-Advertiser: Drafted response to inquiry surrounding visitor feedback on the hotel strike and shared that the Go Hawai'i call center had not received any inquiries thus far. (October 7)
  - Bryce Moore, KHON: Drafted quote surrounding inquiry about the hotel strike. (October 10)
  - Dawit Habtemariam, Skift: Ilihia Gionson (IG) connected Dawit with Gov. Green's communications team for upcoming interview. (October 14)
  - Lia Kamanā, KITV: Daniel Nāho'opi'i (DN) interview on international market recovery, including Korea, and sports tourism. (October 28)
  - Allison Schaefers, Honolulu Star-Advertiser: Drafted response on HTA's sports tourism efforts and budget. (October 30)
- Coordinated and/or assisted with the following media relations, including:
  - Rachel Billings, The Week Junior's Science+Nature Magazine (UK): Provided Barberstock online image library for upcoming story on ocean navigation. (October 7)
  - Jamie Winpenny, Hawai'i Hospitality: Assisted MVCB with HTA information on its KPIs focused on visitor spending instead of arrivals and hotel occupancy rates for upcoming story on Maui recovery efforts. (October 15)
  - Flavio de Sica, ILTM and PANROTAS Luxury Travel Report: Reviewed and declined advertising request surrounding report focused on Brazil's luxury travel sector. (October 16)

- Lauren Campbell, iHeartMedia Baltimore: Coordinating DN podcast interview on regenerative tourism. (October 28)

### **Community Initiatives and Public Outreach**

- Los Angeles Clippers Partnership
  - Drafted pre-game script for Clippers announcer to introduce Gov. Green, Chair Hannemann and KK at center court. (October 3)
- Taiwan Mission
  - Drafted talking points on Taiwan market and tourism efforts for Lieutenant Governor Sylvia Luke's interview on SET TV. (October 9)
- World Surf League (WSL)
  - Drafted HTA quote for inclusion in Sunset Pro news release. (October 14)
- University of Hawai'i Basketball Partnership
  - Added keiki clinic and exhibition games to the HTA website homepage and Events page. Updated information with registration details. (October 21-24)
  - Coordinated HTA news release announcement with UH Communications and Hawai'i Community Foundation teams. (October 24)
- Hotel Labor Negotiations
  - Monitored ongoing situation.

### **Internal Communications**

- Managed 2024 Communications Calendar on an ongoing basis.
- Conducted weekly communications calls with HTA leadership.
- Updated President and CEO job posting deadline on HTA website.
- Worked on updates to HTA's Emergency Activation & Messaging Matrix.

### **Administrative**

- Finalizing updated Public Affairs planning as we prepare to rescope and procure contracted support for Communications & Public Affairs Support Services, HTA Website Services, and production support for the Hawai'i Tourism Conference and Spring Tourism Update in the coming months.

### **Government Affairs**

The Public Affairs Office continues to monitor the impacts of newly enacted legislation from the 2024 Legislative Session, as well as proceedings at our county councils.

### III. DESTINATION STEWARDSHIP BRANCH

**Functional Statement:** The Destination Stewardship Branch is responsible for implementing projects and programs that seek to balance and meet the economic, environmental, and social/cultural needs of Hawai'i while working in close partnership with the visitor industry and residents.

#### *Natural Resources Initiative*

**Overview:** Support programs that protect, maintain and enhance Hawai'i's natural resources and cultural sites to improve the quality of life for all of Hawai'i's residents and to enhance the visitor experience in alignment with the Authority's mission to strategically manage Hawai'i tourism in a sustainable manner consistent with economic goals, cultural values, preservation of natural resources, community desires, and visitor industry needs. The [HTA's Five-Year Strategic Plan 2020-2025](#) lays out the Natural Resources Pillar objectives to "encourage and support sustainable and responsible tourism; engage and encourage active natural and cultural resource management strategies in areas frequented by visitors; and to promote visitor industry alignment with the Aloha+ Challenge, Hawai'i's recognized model to achieve the UN's SDGs, especially for energy and water."

Komo I Ka 'Āina is a community-based land management program focused on fostering ecological responsibility that contributes to community wellness in Kailua, O'ahu by integrating indigenous and western methods of conservation, restoration, and food production. Awarded \$52,000, Komo I Ka 'Āina undertook year-long initiatives focused on invasive species removal, native plant and wildlife conservation, and cultural education, particularly engaging individuals with historical ties to the area. On October 12, 2024, the Kilohana team participated in a Komo I Ka 'Āina workday at Kukanono, the wahi pana of Ulupo heiau and Kawainui fishpond. Approximately 200 residents and visitors participated, with attendance tracked using a waiver release form. Participants were divided into two groups – 'āina (land work group) and wai (water work group). The organization provided necessary tools, including gloves, protective shoes, and eyewear. Komo I Ka 'Āina leaders were mindful to thank the Hawai'i Tourism Authority for generously supporting their on-going effort to perpetuate the Hawaiian cultural and land management practices of our kupuna. Following the workday, volunteers enjoyed a lunch prepared with ingredients harvested that morning.

#### *Hawaiian Culture Initiative*

**Overview:** Support programs that perpetuate and recognize the uniqueness and integrity of the Hawaiian culture and community and their significance in differentiating the Hawaiian Islands through unique and genuine visitor experiences

### *Ma‘ema‘e Program*

In the Hawaiian Culture pillar of the current Hawai‘i Tourism Authority Strategic Plan, one of the Milestone Measures for Objective 4 calls for the establishment of a system for measuring and reporting the number of lodging industry entities with on-site cultural practice programs and practitioners. HTA recently awarded contract PON 24025, to the Native Hawaiian Hospitality Association (NaHHA) for the professional services of developing a comprehensive database to accurately identify and update contact information for Native Hawaiian Cultural Practitioners, Organizations and Visitor Industry Partners. This Hawaiian Culture Database will be owned and managed by the Hawai‘i Tourism Authority with results to be tracked and reported annually. The contract was fully executed on June 4. The project has made substantial progress in the month of October and is currently in the final stages.

### *Kūkulu Ola Program*

The Hawai‘i Tourism Authority’s Kūkulu Ola Program, consistent with Chapter 201B-7(a) of the Hawai‘i Revised Statutes (“HRS”) which allows HTA to “enter into agreements that include product development and diversification issues focused on visitors”; and Chapter 201B-7(5), which gives the HTA responsibility for “perpetuating the uniqueness of the native Hawaiian culture and community, and their importance to the quality of the visitor experience, by ensuring that Hawaiian cultural practitioners and cultural sites that give value to Hawai‘i’s heritage are supported, nurtured, and engaged in sustaining the visitor industry”; and Chapter 201B-3(a)(20) which states that HTA “may coordinate the development of products with the counties and other persons in the public and private sector, including the development of sports, culture, health and wellness, education, technology, agriculture, and nature tourism. In addition, the HTA Five-Year Strategic Plan 2020-2025 lays out HTA’s plan to support Hawaiian Culture as stated above.

The ‘Ulu ‘Ae Kaiaulu series is a cultural initiative designed to foster a deep sense of place and civic engagement in West O‘ahu through culturally grounded learning and stewardship opportunities. Awarded \$15,700, the series comprises of three key components: the Pu‘u o Kapolei Stewardship Program, the Ike Kupuna Workshop Series, and the Makahiki Ma Kapolei Celebration. All intended to enhance community and visitor appreciation for Native Hawaiian practices and the natural environment and



engage a minimum of 200 individuals at any given time in meaningful experiences at key historical and cultural sites. The Kilohana attended the final workshop in the Ike Kupuna Series on October 19, 2024, a Ni‘ihau shell jewelry making workshop led by Kumu Kai Hyde. Due to it being the final workshop, attendance was lower with only three participants – parents of ‘Ulu ‘Ae Kaiaulu learning center students. Participants purchased kits and were able to create Momi and Kahelelani shell earrings, bracelets or necklaces. HTA banners were hung at the entrance of the learning center and organizers acknowledged HTA for their generous support of the program.

**Visitor Experiences Initiative**

**Overview:** The primary objective is to enhance the visitor experience while also preserving and promoting Native Hawaiian culture in addition to Hawai‘i’s multi-ethnic cultures and communities. This is achieved by fostering genuine, respectful, and accurate visitor activities and programs that connect tourists with the rich heritage of Hawai‘i, all while supporting local cultural practitioners, artists, and craftsmen to ensure the preservation and perpetuation of Hawaiian culture and the local culture of Hawai‘i.

Signature Events Program (SEP)

The HTA’s Signature Events program supports major events that have broad appeal and align with Hawai‘i’s destination’s image and brand. These world-class events help Hawai‘i to remain competitive, generate media exposure for Hawai‘i, increase economic benefits and ensure tourism and communities enrich each other. Signature Events aim to attract attendees and participants from outside the state of Hawai‘i with extensive national and international marketing and have a significant economic impact as measured by the number of out-of-state participants. The program seeks to support and strengthen existing events and create new events for both residents and visitors.

Event Name	Organization	Island	Award Amount	Summary
44 <sup>th</sup> Annual Hawaii International	Hawai‘i International Film Festival	Statewide	\$50,000	The Hawai‘i International Film Festival (HIFF) is Hawai‘i’s premier film organization in the Asia-Pacific region aims to entertain, enlighten, and inspire through a focus on

Film Festival				<p>Hawai'i-made, Asian, and Pacific Rim cinema. HIFF's annual Fall Film Festival presents international cinema to over 35,000 attendees, promoting cultural exchange and supporting Hawaii's creative industries. As an incubator for local talent, HIFF uses a comprehensive approach that includes educational programs and industry workshops to uplift Hawaii's creative community, enhancing the state's cultural and economic landscape. The Kilohana team had the privilege of attending "In Conversation with Temuera Morrison," followed by a screening of "The Book of Boba Fett Chapter 2: The Tribes of Tatooine." Mr. Morrison's insightful discussion highlighted the importance of increased Polynesian and Islander representation in the film industry. He shared his personal journey, from his early roles in films like <i>Once Were Warriors</i> to iconic characters like Jango and Boba Fett, and his recent collaboration with Jason Momoa in <i>Aquaman</i>. Mr. Morrison's passionate call to action inspired the audience to support emerging talent and continue to push the boundaries of storytelling. He ended his talk with a call to action saying, "there's more to come from Islanders in the film industry." HIFF was responsive to the team and compliant with all requests for sponsorship inclusions.</p>
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Community Enrichment Program (CEP)

The Community Enrichment Program fosters community-based tourism projects that improve and enrich Hawai'i's product offerings. These projects provide unique, authentic, and highly valued visitor experiences and represent activities developed by our community, for our community, and that the community wants to share with our visitors.

Event Name	Organization	Island	Award Amount	Summary
Legacy: The Siva Afi	Malu Productions, Inc.	O'ahu	\$10,000	<p>The Siva Afi Fire Knife Competition, held at Sea Life Park on October 5, 2024, drew a crowd of approximately 300-400 residents and visitors. The competition showcased the talents of fire knife dancers from various locations, including Samoa, Tahiti, Texas, California, and O'ahu. Competitors ranged in age from 7 to senior. To maximize attendance, Malu Productions advertised the event at the park weeks in advance. Ticket sales, QR codes, and completed surveys were used to track the number of attendees. Sea Life Park provided an ideal setting for the event, offering ample seating, covered lanai areas, and easily accessible amenities allowing families were able to enjoy the park's attractions. The event organizers supported a variety of local vendors with over 20 food and craft booths</p>

				operating. HTA banners were displayed at the entrance, the walls of the stage, tents and digitally on the large screen adjacent to the stage. Emcees recognized HTA at regular intervals throughout the 3-hour long event.
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Visitor Assistance Program (VAP)

**Overview:** HTA’s Visitor Assistance Program (VAP) provides support, resources and guidance to visitors who are victims of crime and other adversities while traveling in Hawai‘i. Services include providing phone cards, transportation, meals, hospital visits and moral support, replacing lost IDs, assisting with hotel and airline bookings, and more. Under HRS 237D-6.5(b)(2), HTA, at a minimum, is required to spend 0.5 percent of the Tourism Special Fund on safety and security initiatives.

**October Stats:**

County	No. of Cases Handled	No. of visitors served	Primary Visitor Market(s) Served	Industry \$\$ Contributions
Hawai‘i	18	56	US East & West Hawaii, Europe, Australia, Latin America	\$20,300 (cash) \$13,697 (In-Kind)
Honolulu	32	69	US East & West Japan, Canada, Oceania, Europe	\$1,742.64 (cash) \$13,287.20 (In-Kind)
Kaua‘i	10	26	US West & East	\$0 (cash) \$350.00 (In-Kind)
Maui	12	23	US West	\$6,600.00 (In-Kind)

Ho‘okipa Malihini Program

Ho‘okipa malihini means to welcome guests and as its name suggests, this program will enhance the visitor experience and resident-visitor interaction. Programming includes cultural programs and entertainment in various resort and visitor areas statewide that support Hawaiian programs and cultural practitioners, craftsmen, musicians, linguists and/or other artists to help preserve and perpetuate Hawaiian culture in a way that is respectful and accurate, inviting, and educational. The program will directly support the Hawaiian community and cultural practitioners by creating opportunities to involve them

in the industry with industry partners and visitors. While some resort/hotel areas have cultural directors this program helps to reinforce our collective kuleana to Mālama Hawai'i.

**Resort Area Hawaiian Cultural Initiative (RAHCI)**

HTA's Resort Area Hawaiian Culture Initiative provides support to cultural practitioners and musicians who present Hawaiian experiences, entertainment, and music in resort areas.

No significant updates for RAHCI/HMI events in October. Most on-going performances were monitored at the beginning of the year.

**Kāhea Greetings Program (Airports And Harbors)**

Programming includes regularly scheduled, free, year-round entertainment to create a Hawaiian sense of place for the millions of visitors entering Hawai'i through our airports and harbors statewide.

Due to lack of FY25 funding, entertainment at the airports has been reduced to special events only. Below is the greeting/entertainment schedule at each airport for October:

Airport	HNL	OGG	KOA	LIH	ITO
<b>Schedule</b>	10/28/24 -Special Event- 1 year anniversary for DL 181 HNL-HND	none	none	none	none
<b>Paid Musicians &amp; Cultural Practitioners</b>	4	0	0	0	0

Greetings are provided at harbors as ships arrive. Below is the report on greetings in October:

Harbor/Pier	Hilo	Kona	Nāwiliwili
<b>Ships Greeted</b>	16	9	11
<b>Passengers &amp; Crew Greeted</b>	50,638	32,684	27,764
<b>Visitors Served</b>	25,319	11,547	27,764
<b>Paid Musicians &amp; Cultural Practitioners</b>	3	8	18

*Post-Arrival Messaging*

All four channels of Visitor Education and Post-Arrival Marketing – Native Ads, Digital Display, Search Engine, Social Media – are tracking well to KPIs established by our

Destination Stewardship contract. The click-thru rate of social media is tracking higher than anticipated which is a favorable metric. We will be reporting specific KPIs for this quarterly. Please see the Destination Stewardship appendix for more details on this topic.

At the request of HTA, Kilohana Collective by CNHA presented various marketing initiatives in the Market Trends: Island Marketing panel at the HTA Tourism Conference. We presented the recent Events & Festivals messaging, which are running at airport baggage claims, social media and various digital display outlets. We update the Events & Festivals creative monthly to showcase 'Umeke funding partners' events of the month. In addition, we also presented the push to celebrate champions of the Hospitality Industry at the Native Hawaiian Convention. Furthermore, we highlighted the recent reimagined bus tours from a kanaka maoli lens in a regenerative tourism model at the past two Native Hawaiian Conventions and for the Pacific Century Fellows.

At the request of HTA, Kilohana Collective by CNHA presented the past year of Visitor Education Post-Arrival Marketing work at the HTA Tourism Conference. In addition, HTA also premiered Travel 808: Lē'ahi episode and the new Mindful Malihini podcast.

### Smart Tourism

HTA staff has asked Kilohana to pause this part of their work while HTA evaluates how to proceed, given the Maui wildfire and other factors. HTA Staff worked with Kilohana to reach an agreement that the contract will be reduced by \$1,200,000 since this work was paused and removed from the scope. Once everything is finalized, a change order and supplemental contract will be done.

In lieu of the RFP HTA has directed Kilohana to undertake a project to draft a report and conduct up to 100 surveys of key stakeholders and leaders to implement the Legislatively directed statewide reservation system. Below is a summary of the project.

#### Hawai'i Reservation System Report: **PROJECT TIMELINE & MILESTONES:**

- **Kickoff:** September 12, 2024.
- **Key Deliverables:**
  - Draft presentation deck: December 12, 2024.
  - Live presentation: December 19, 2024.
  - Final PDF version: Post-PPT delivery (date TBD).

### Stakeholder Engagement:

- **Stakeholder List:** 98 names received from Kilohana.
- **Interviews:**
  - 98 invitations were sent; 67 interviews were scheduled (69%), 60 completed (61%).
  - Final seven interviews to be completed by November 15, 2024.
  - Survey completion rate: 88% of scheduled interviews.
- Options for handling unscheduled stakeholders include finalizing the report with current data or updating later based on additional interviews.

### Research & Analysis Progress:

- Completed preliminary research on 200+ destination apps and 15 Hawaii reservation platforms.
- SWOT analysis initiated.
- Developed a feature-function matrix from 60 interviews.
- Began qualitative and thematic analysis of interview data.

### Technical & Business Strategy Development:

- Consulted with four vendors and experts.
- Created functionality matrices and designed initial report sections.

### Upcoming Activities:

- Finalize interview analysis.
- Develop stakeholder analysis, business requirements, and marketing strategies.
- Draft executive summary, recommendations, and next steps.

### Risks & Mitigations:

- **Risk:** Delays due to stakeholder non-response.
- **Mitigation:** Decision by HTA and project team on next steps for non-responsive stakeholders.

### Financials:

- Invoice #1 (\$138,626.50) processed.
- Invoice #2 (\$83,175.09) submitted; payment pending.
- Invoice #3 (final) to be submitted by December 31, 2024.

### [Destination Management](#)

On October 16, 2024, we welcomed Destination Managers Patti Ornellas (Kaua'i) and Meagan DeGaia (Maui Lāna'i) to the HTA Destination Stewardship Team. The destination managers continue to meet with community organizations and stakeholders to share the work we have done and plan to move forward. Recruitment for the vacant Destination Manager positions (O'ahu, Hawai'i island, and Moloka'i) is ongoing.

### **Technical Assistance & Capacity Building**

HTA staff is working with Kilohana on digesting and using the data from the technical needs assessment to inform the development of the content and format for the three community tourism collaboratives. We anticipate they will launch in Q3 2024 and focus on Foundational Technical Assistance, Community Stewardship and Regenerative Experiences.

### **Tour Guide Certification Program**

HTA Staff, Kilohana, in collaboration with TripSchool, has finalized an eight-module Tour Guide Certification Curriculum, emphasizing Hawaiian culture, history, customer service, and safety. Additional modules include interpretation skills, geography, sensitivities, and current issues, refined through stakeholder input and the University of Hawai'i's TIM report. The program aims for a tiered certification system to support ongoing skill development and mastery.

#### Key Objectives:

1. Equip tour guides with essential skills in cultural understanding, safety, and professionalism.
2. Ensure adaptability to diverse sectors (e.g., hotels, airlines, restaurants).
3. Promote sustainable tourism and stewardship of Hawaiian resources.

#### Phased Work Plan & Milestones:

1. Curriculum Development (Oct 9–25, 2024):
  - Review TIM report and previous curricula.
  - Collaborate with local stakeholders for content refinement.
  - Choose e-learning platforms.
2. Content Creation (Oct 29–Nov 7, 2024):
  - Film course content across islands featuring diverse local experts.
3. Promotional Strategy (Nov 15–Dec 15, 2024):
  - Develop marketing and enrollment plans targeting tour companies and community colleges.
4. Final Review & Delivery (Dec 15–20, 2024):



- Present final curriculum with interactive videos, e-books, assessments, and promotional materials.

#### Budget & Metrics:

- Budget: \$99,600
- Metrics:
  - Engagement with 15 cultural practitioners and 4 operators per island.
  - Utilization of data dashboards for real-time progress tracking.

#### Expected Impact:

- Enhanced cultural sensitivity and customer service among guides.
- Increased sustainability and professionalism in Hawai'i's tourism sector.
- Opportunities for guides to grow and diversify their careers.

### Qurator Program

During the month of September, Qurator continued to build upon the momentum of the public launch. Between September 1st and 30th, 14 new users registered on Qurator's website, raising the total number of in-process applicants to 157. The count of official Qurator certified businesses is now 43, and 27 are posted on the website. Qurator continued to receive a steady stream of attention and engagement that further established its reputation as a mark of responsible tourism. The most notable of which was that the three largest Japanese inbound tour operators (HIS, JALPAK and JTB Hawai'i) all joined Qurator. As a result, many of their local partners started their application. To streamline the process by which visitors find Qurator-certified businesses, efforts are ongoing to get them integrated into the GoHawaii website.

### Sports

**Overview:** HTA supports amateur, collegiate, and professional sports programs and events, including planning for the LPGA, Big West Conference, LA Clippers, World Surf League (WSL), and PGA. These tournaments, exhibitions, and activities enhance Hawai'i's brand image while attracting visitors to our islands, who, in turn, stimulate our state and local economies. HTA also ensures that all supported sports events and programs include a robust community engagement and benefit component in their proposals. These initiatives may feature youth clinics, coaches clinics, and other programs that provide Hawai'i's youth access to unique resources and mentorship

opportunities otherwise unavailable, fostering local talent and promoting community well-being.

## VI. BRAND BRANCH

**Functional Statement:** The purpose of the Brand Branch is to strengthen tourism's overall contribution to Hawai'i by taking the lead in protecting and enhancing Hawai'i's globally competitive brand in a way that is coordinated, authentic, and market appropriate. This includes the oversight of the implementation of annual brand marketing plans in select major market areas (USA, Japan, Canada, Oceania, Korea, China, and Europe), sales & marketing for single property and city-wide global meetings, conventions and incentives or MCI, Global Support Services which includes management of a digital assets library, social media tools, and the gohawaii.com consumer website, affiliate sites, and application, Island Destination Brand Management & Marketing with representation and expertise provided in each county of Hawai'i, and sports programs.

### *Major Market Destination Brand Management*

**Overview:** This initiative focuses on destination brand marketing for leisure travel in seven major market areas with pre-arrival communications to educate visitors with information about safe, respectful, and mindful travel within the Hawaiian Islands. Another key emphasis of the initiative is to drive visitor spending into Hawai'i-based businesses to support a healthy economy, including supporting local businesses, purchasing Hawai'i-grown agricultural products, and promoting Hawai'i-made products in-market, in partnership with the state's Department of Business, Economic Development & Tourism (DBEDT) and the private sector.

Engaging with Brand USA on two projects that span across multiple international markets, increased efficiency and takes advantage of the matching funds provided by Brand USA

- Brand USA X Expedia promotion: to boost short-term bookings to Hawai'i; Japan, Canada and Oceania; Brand USA matches 20%+Expedia 40%
- 

### US Major Market Area

- As a part of the L.A. Market Activation, HTUSA, and the Island Visitors Bureaus conducted three Educational Blitz events in Irvine, Woodland Hills, and Pomona, CA, Oct. 15-17. The attendee count for the workshop seminar was 145 people,

and the attendee count for trade show, networking, dinner, and mainstage presentations was 168 people. In addition to a trade show featuring 20 Hawai'i supplier partners, Island Visitors Bureau representatives conducted a pre-event in-depth destination update. The event featured Mailani Makainai, multi-Nā Hōkū Hanohano award-winning musician and composer, with support and hula from Miss Hawai'i USA 2009 Aureana Tseu, who performed and integrated educational talk story with entertainment. Following the trade show, HTUSA conducted a destination overview highlighting "The People. The Place. The Hawaiian Islands.," travel updates, the Mālama Hawai'i program, and travel advisor resources. Ten participating suppliers conducted presentations providing company and product updates. HTUSA created and distributed a reference guide to take home and incorporated Kahoot, which is a quiz game to keep the event fun and interactive. HTUSA featured Mana Up baskets with products made in Hawai'i from each island as centerpiece giveaways and Noho Home tablecloths used at the registration table and trade show. Twenty partners participated in the trade show, and 10 partners had speaking sponsorships at each event, including:

- Aqua-ASTON Hospitality
- ALG
- Battleship Missouri Memorial
- Courtyard O'ahu North Shore
- ESPACIO the Jewel of Waikiki
- Fairwind Cruises
- Four Seasons Resorts Hawai'i
- Go City
- Hyatt Regency Maui Resort & Spa
- Kamaaina, LLC (Hawaiian Hotels and Resorts and Napali Kai Beach Resort)
- Mana Kai Maui
- MacNaughton Hospitality
- Outrigger Resorts & Hotels
- Pleasant Holidays
- The Royal Sonesta, a Kaua'i Resort
- The Surfjack Hotel and Swim Club
- The Waikiki Collection, Marriott Resorts Hawai'i
- The Westin Maui Resort & Spa
- Timbers Kaua'i
- Wayfinder Waikiki

- HTUSA's programming supported MVCB's "Taste of Maui" Mini Press Trip from Oct. 24-28. The trip showcased Maui's vibrant culinary landscape, with special focus on the resilience and recovery of the island's food community. Notable journalists included Laurie Lyons-Makaimoku (Fodor's, AAA Via, Hawai'i Magazine), Rachel Ng (Tripadvisor, AFAR, NatGeo), and Sarah Burchard (Forbes, AFAR, Eater, Hawai'i Magazine, Hana Hou). The itinerary highlighted local chefs, restaurants, farmers, producers, and artisans through visits to the Hawai'i Food & Wine Festival, West Maui hotel properties, Wailuku local businesses, and reopened Lahaina establishments. This program emphasized Maui's agricultural heritage and the strength of its culinary community following the challenges of the past year.

### Canada Major Market Area

- The annual Aloha Canada mission took place towards the end of October with great success. The four island Visitor Bureaus participated along with 15-17 partners representing hotels, attractions, activities, tour operators, and a cruise line. The events took place in Vancouver on Oct. 21st, Toronto on Oct. 23rd, and Calgary on Oct. 24th. Overall agent attendance was over 300 people. Additionally, for the first time, HTCAN added media reception events in both Vancouver and Toronto that included all participating partners. Coverage of the events has been significant in the Travel Trade online publications. They also included local cultural practitioners who also engaged the audience in a hula lesson.
- Discover America Media Day took place on October 30<sup>th</sup> in Toronto where HTCAN discussed what's new on the Hawaiian Islands, pitched media for individual and group FAMS and discussed future collaboration ideas. As an outcome, trade publications wrote articles post-event about overall US travel where Hawai'i had inclusion.
- On October 1st, HTCAN participated in agency Blowes & Stewarts Travel Show in Listowel, Ontario with over 150 attendees. They presented to the full audience and participated in a trade show that offered one-to-one-engagement.

### Japan Major Market Area

- In October, HTJ continued its advertising efforts for the Yappari Hawai'i campaign across social, digital, and print, aiming to promote Hawai'i as a premier overseas travel destination. The campaign garnered over 34 million impressions this month, with contributions from social media (5.2mil), YouTube (1.15mil), Yahoo Web

Banner (27.2mil), Tver & Abema Online TV (299K), and Print (381K). Additionally, Yappari Hawai'i video broadcast was continued on JAL's domestic flights reaching an audience of 1,965,060 individuals, while ANA's international and domestic flights reached 4,150,000 people in October.

- As part of romance travel promotion, HTJ partnered with Mynavi Wedding to launch a dedicated Hawai'i page on the Mynavi Wedding website. This initiative showcases why Hawai'i is ideal destination for the romance segment while providing essential information and directing users to allhawaii.jp. This campaign generated an impressive 8.7 million impressions in October, with additional advertising on YouTube and Yahoo Web Banner yielding over 13 million impressions.
- HTJ rolled out a promotional campaign with Expedia and VISA, set to run from September 2024 to December 31, 2024. This initiative offers a 12% discount for bookings made with a VISA credit card and includes special free upgrade promotions from 43 hotel partners, all designed to stimulate travel demand to Hawai'i. In October alone, this promotion resulted in 11,330 bookings, with an average length of stay ranging from 6 to 10 days.

### Oceania Major Market Area

- Hawai'i Tourism Oceania is honoured to have been named a finalist in the Australia Travel Industry Association Awards. (with Tourism New Zealand winning the award)
- In collaboration with Destination Webinars, HTO created 'The Hawaiian Islands Webinar Series' of engaging, island-specific webinars to provide in-depth insights into the unique offerings of each Hawaiian island. These 20-minute sessions were developed with input from each of the respective Island Visitor Bureaus of Hawai'i, ensuring that each presentation is rich in local knowledge and tailored to highlight the most captivating and unique aspects of each island. The series went live in early November and is designed to equip travel agents with essential information on O'ahu, Maui, Kaua'i, and the Island of Hawai'i
- Throughout October, Hawai'i has received a continuation in media coverage after HTO's Aloha Down Under roadshow that had taken place in September. Including most recent coverage of a special mention in Karryon's Luxury section (reach: 35,000) and LATTE Luxury news (reach: 25,000).
- HTO's partnership with Hawaiian Airlines for a famil incentive program concluded on October 31st, with the winning travel agent selected for the November trip to O'ahu

and Kaua'i. This initiative attracted strong interest, reflecting the trade's enthusiasm for Hawai'i and a commitment to enhancing destination knowledge.

### Korea Major Market Area

- In October, HTK hosted an influencer FAM trip focused on showcasing Hawai'i through a wellness perspective. Four carefully selected influencers, known for their strong presence on platforms such as Naver Blog and Instagram, were invited to participate. Through their vibrant posts and engaging stories, they effectively highlighted the beauty and serenity of Hawai'i, emphasizing Hawai'i's unique wellness offerings. The FAM deliverables include 16 social media posts, one long-form YouTube video, four Naver Blog articles, and 40 Instagram posts.
- Beginning on October 21 and running for one month, HTK is collaborating with cinema giant CGV to promote the newly premiered film, "Songs of Love from Hawai'i". This musical drama explores themes of sacrifice, love, and the unbreakable bonds formed by the first Korean immigrants. As the largest multiplex cinema chain in South Korea, CGV will host online events across various platforms to encourage audiences to see the film and consider a visit to Hawai'i, with a travel ticket to Hawai'i as the enticing prize.
- From September 11 to October 11, HTK teamed up with Shinhan Card to launch the campaign "The People. The Place. The Hawaiian Islands". During this promotional period, cardholders spent approximately US\$195,000 on travel to Hawai'i, generating a notable 2.1 million impressions through Shinhan Card channels. Following the campaign, Shinhan Card also provided valuable travel data regarding destinations in Hawai'i.

### China Major Market Area

- In October, HTC published a series of articles on its social media platforms, including Weibo, WeChat Official Account, WeChat Video Channel, Douyin, and Xiaohongshu. The topics covered included USS Missouri Memorial, Pearl Harbor National Memorial, Pacific Fleet Submarine Museum, Pearl Harbor Aviation Museum, Kaua'i Chocolate & Coffee Festival, the merger of Hawaiian Airlines and Alaska Airlines, and HTA's visitor assistant program by Hawai'i Visitor Aloha Society.
- From October 23 to November 1, the XIAO Elevator MICE group from Hangzhou visited O'ahu. The group had a total attendance of 290, while 183 members were unable to travel to Hawai'i due to visa issues. During their trip, the group explored iconic attractions, including Kualoa Ranch, 'Iolani Palace, and the Polynesian Cultural Center. The estimated economic impact of this group was CNY9.3M

(US\$1.33M). HTC team provided support by assisting with visa applications and tailored trip itinerary.

- HTC invited Food-Travel Blogger Chef Wayne and his team to Hawai'i for an influencer filming project focused on multicultural cuisine and the farm to table movement, scheduled for early November. Chef Wayne boasts a combined following of 2.7 million across his social media platforms. During their visit, Wayne's team will also capture content at the Hawai'i Food and Wine Festival and participate in farm-to-table tours. The deliverables from this project will include two videos and three articles on various Chinese social media channels, along with a live broadcast covering the festival and the farm to table experience.

### Europe Major Market Area

- Targeting affluent, responsible travelers in the UK, Germany, and Switzerland, the Discover Hawai'i digital campaign focuses on building brand awareness and driving engagement and conversions. The second phase of the campaign was launched in September. To date, the campaign has generated 66,448 clicks/website visits to Gohawaii and partner tour operator sites. In October alone, the campaign achieved 1,824,741 impressions, reaching 754,589 individuals.
- On October 14, HTE launched the Mālama Hawai'i campaign in Germany with Hawaii.de, followed by a UK launch on November 1 with Audley Travel. Running through December, the campaign targets affluent, eco-conscious travelers, promoting Mālama experiences that celebrate Hawaiian culture and promote environmental protection. Featuring impactful video content, including "The People. The Place. The Hawaiian Islands" series, the campaign emphasizes meaningful travel to Hawai'i. In October, the German segment achieved over 1 million impressions and more than 154,000 interactions, with the video content receiving over 201,000 views and a high completion rate of 77%.
- In its Fall 2024 issue (#9), Luxe Style featured an eight-page article by Detlef Berg, who traveled to O'ahu and Maui. The article highlighted insights into the islands, including cultural aspects like surfing, and recommended visits to locations such as the Bishop Museum and Kualoa Ranch. Additionally, a group press trip was held from October 15 to 21 on Hawai'i Island and Kaua'i, attended by four media outlets. Three attendees also opted to extend their stay on O'ahu for an additional three nights. A post-trip report on media exposure will be available later this year.

### Cruise Market

- A Cruise Industry Partners meeting will be held on Monday, December 9<sup>th</sup>. This meeting will include HTA's contractor Access Cruise, Inc. Some of the topics that will be discussed are recent cruise industry updates and HTA general updates.

Video content will also be provided at that time which may be utilized internally for employee training by cruise partners to help increase awareness of Hawaiian cultural best practices as it pertains to the cruise industry. A brief overview will also be given on the upcoming construction for the Skyline rail project that will be progressing to near the pier terminals at a future date.

### ***Global Meetings, Conventions & Incentives***

**Overview:** The MCI market can become a critical source of profitable “base” business booked years in advance. This base of business enables a higher yield of shorter-term leisure business. It can also help fill hotel occupancy gaps in future years by capitalizing on off-peak opportunities. To be competitive and thrive in the changing world of business tourism (MCI market), Hawai‘i must capitalize on its strategic mid-Pacific location, which conveniently connects East and West, helping organizations create business events that are international, engaging and memorable experiences. Our location also contributes to a unique experience and the group setting of these meetings, conventions and incentives allows us to further educate our markets about Hawaiian culture and our precious resources by immersing attendees and stakeholders in these activities. Primary focus is on MCI sales and marketing in the United States, Japan, Canada, Oceania, Korea, and other Asia markets as appropriate.

### **Sales & Marketing Efforts:**

- Meet Hawai‘i led an impressive delegation at IMEX America 2024, the premier trade show for the meetings, conventions, and incentives markets in the U.S. The October 7-9 event in Las Vegas featured the largest-ever Hawai‘i representation, with 38 podiums accommodating a dynamic team of 30 industry partners, four Island Visitor Bureaus, and four Meet Hawai‘i representatives. They also liaised with IMEX media and coordinated interviews with Aaron J. Salā and Lynn Whitehead.
  - The team's engagement secured 803 total booth appointments and welcomed 895 verified visitors to the Hawai‘i exhibition space. Meet Hawai‘i representatives alone conducted 157 direct appointments, while also delivering an impactful group presentation to 24 buyers, further amplifying the destination's message.
  - A strategic highlight of the show included a joint reception with Marriott Hotels on October 8th, fostering valuable networking opportunities and strengthening industry partnerships.



- The delegation enriched the experience by incorporating Hawaiian culture through demonstrations by renowned lauhala weaver Keoua Nelsen, effectively showcasing Hawai'i's unique ability to blend professional excellence with cultural knowledge.
  - The enhanced presence at IMEX America 2024 reinforced Hawai'i's position as a premier destination for group business, demonstrating the islands' continued commitment to delivering exceptional meeting and convention experiences.
- Meet Hawai'i representatives worked closely with Hawai'i Convention Center staff to facilitate the Electrochemical Society's participation in a corporate social responsibility activation, focusing on bioremediation efforts to clean the Ala Wai Canal during their annual PRiME Convention.
  - Over 5000 attendees, in which 100 participants engaged in this activity on the Convention Center's third floor. The Electrochemical Society's Director of Meetings, along with the President and Technical Director of the Genki Ala Wai Project and Meet Hawai'i representatives, commenced the event with a welcome address. The ceremony included a traditional Hawaiian blessing and presentation by a kumu. The event culminated with attendees proceeding down the grand staircase to release 1,000 bioremediation balls into the canal.
  - This initiative created significant positive environmental impact while fostering awareness and appreciation of Hawai'i's natural resources among the international attendees and in local media.
- A couple of PR highlights in October included:
  - A press release was drafted in partnership with HTA: "Hawai'i Tourism Authority and Meet Hawai'i Execute Three-Year Partnership with JTB to Attract High-Value Business Events from Japan" that has gained media attention in various publications, both in local as well as tourism-related media.
  - Coverage in Pacific Business News on October 10<sup>th</sup> that Hawai'i Convention Center receives LEED re-certification.
- **Citywide:**
  - While strikes took place with key headquarter hotel partner Hilton Hawaiian Village, the citywide sales and service teams have done a great job managing contracted groups through this process. October brought three offshore conventions with over 10K attendees, all with room blocks at Hilton. Collaboration between HVCB, Hilton and HCC were key to its success.

- The strike has had a significant impact on the Hilton team's ability to deliver to customers who have selected us as a destination and with the citywide team working diligently to finalize contracts.
- Currently the citywide team has nine bookings with 43K total room nights, that are expected to close in November and December. There are another six bookings being pushed for a decision and contract by EOY.
- **Single Property:** While more citywide clients attend IMEX, the global show is primarily geared towards in-house business for our hotels and destination partners. IMEX assisted in the momentum as a likely tentative room night production this month for single property, and this coupled with the new incentive campaign that recently launched, 2025 business is being prioritized which should help to close more business in November and December 2024.
- Future pace for both 2025 and 2026 have increased since last month. 2025 increased from 87% to 92% and 2026 bookings have increased by 2%.
- **List of October Sales Activities:**
  - Client Promotional Events
    - October 1-3, 2024 – HTA Annual Meeting – O'ahu
    - October 18-21, 2024 – Trip/AAO/Glaucoma Promo – O'ahu
    - October 24, 2024 – HSMAI Networking Event – O'ahu
  - Educational Events and Trade Shows
    - October 2, 2024 – Hyatt Maui Customer Webinar – Virtual
    - October 3, 2024 – Destination Reps Quarterly Mtg – Chicago, IL
    - October 6-11, 2024 – IMEX – Las Vegas, NV
    - October 21-23, 2024 – IRF Leadership Council Meeting – Aspen, CO
    - October 23, 2024 – PATA Global Tourism and Air Service Outlook
      - J. Eslinger/J Chun speakers – O'ahu
  - Sales Blitzes
    - None to report this month.
  - October Site Visits and Familiarization (FAM)
    - O'ahu – 4
    - Maui – 1

### ***Island Destination Brand Management and Marketing Services***

**Overview:** The Island Destination Brand Management and Marketing Services (IDBMMS) include the support from on-island representatives on behalf of HTA for visitor education, visitor industry engagement, and public relations activities; serving as advisors to HTA on the respective islands and The Hawaiian Islands statewide brand; collaborating with HTA's Global Marketing Team to develop and implement familiarization trips and press trips to areas that are welcoming visitors; providing island-based visitor education support during promotions, trade shows, and missions in major market areas, and coordinating with city and county government officials and designated organizations during crisis management situations.

- In between traveling, the Island Visitor Bureaus prepared for their Annual Meetings. Maui Visitor & Convention Bureau hosted its 37<sup>th</sup> Annual Meeting on Wednesday, November 13, at the Four Seasons Resort Maui at Wailea. It also celebrated its 50<sup>th</sup> anniversary of providing service. In attendance on behalf of the Hawai'i Tourism Authority were Chief Destination Stewardship Officer Kalani Ka'anā'anā and Destination Manager Meagan DeGaia. See MVCB's presentation here: <https://forpci61.actonsoftware.com/acton/attachment/42338/f-a80a0633-7908-4412-b3ec-6ee19127e791/1/-/-/-/file.pdf?sid=TV2:NfGAzsY2W>. Kaua'i Visitors Bureau is up next on December 6, at the Royal Sonesta Kaua'i Resort.

### ***Global Support Services for Brand Management & Marketing***

**Overview:** The Hawai'i Tourism Global Support Services for Brand Management and Marketing support HTA's comprehensive pre- and post-arrival visitor education and destination management efforts, as well as HTA's Global Marketing Team throughout the U.S., Canada, Japan, Oceania, Korea, China, and Europe. The support services include providing market insights to boost strategy, management and development of creative and digital assets, social media, website management, including GoHawaii.com, application development and maintenance, and maximizing emerging technology to support the updating of our Ma'ema'e Toolkit and Brand Guidelines. The resources are also shared broadly with the public for the community, visitor industry, businesses, media, travel trade, and meetings, conventions and incentives industry representatives to utilize in their respective areas.

- The Global Support Services supplemental contract is still pending execution.
- The team is currently working with its partners to update the GoHawaii.com website with the most up-to-date and relevant, as well as appropriate content. Once this

phase is complete, the team will help to update the Brand USA website with consistent information.

## VIII. PLANNING & EVALUATION BRANCH

**Functional Statement:** The purpose of the Planning & Evaluation Branch is to strategically plan for the near, mid, and long-term health and vitality of our visitor industry and manage destination issues that affect communities and the visitor experience. This includes the development, monitoring, and oversight of various plans for the HTA including but not limited to the Tourism Functional Plan, Strategic Plan, Annual Strategic Tourism Management Plan, the Destination Management Action Plans (DMAPs), and the Tourism Management and Marketing Plan. Other activities include development of policy as it relates to tourism.

### *Planning*

Staff is preparing the annual report to the legislature which is due 20 days before the start of the Legislature Session. Staff is also preparing the timeline and process for the update to the State Tourism Functional Plan and development of the Tourism Strategic Plan and DMAPs.

### *Program Evaluation*

#### *Hawai'i Tourism Conference*

Over 650 attendees attended the three-day 2024 Hawai'i Tourism Conference. The evaluation survey results provided great feedback to consider for next year's conference. Results showed:

- 78% were very satisfied/satisfied with the event. Up from 73% in 2023.
- 97% of respondents plan to attend a future Hawai'i Tourism Conference. No change from 2023.

### *Workforce Development Program*

Pursuant to HRS 201B-3(a)(22) HTA will address the industry's evolving needs in workforce training by working with educational institutions to make training available for the industry workforce to help enhance overall skills and quality of service. Sustaining tourism's success also depends on Hawai'i's youth helping to carry the industry forward and becoming the next generation of leaders. Encouraging Hawai'i's high school and college-age students to choose tourism as their career is another important part of

HTA's workforce development initiative in ensuring that there are career opportunities in the tourism industry for Hawai'i's own.

### Scholarship Programs

Staff drafted the Ho'oilina Hawai'i Scholarship program contract with the University of Hawai'i at Mānoa. This program will fund five four-year scholarships to public high school students graduates who enroll at the University of Hawai'i at Mānoa and declare a major in Travel Industry Management (TIM).

Because private industry supported some of their employees for the initial two cohorts of Kapiolani Community College's (KCC) Culinary Institute of the Pacific and Culinary Institute of America's workforce development program, funding was available to support students in cohorts 3 and 4. As such, staff drafted a Supplemental Agreement with KCC to support.

### High School Motivational and Exposure Programs for Hawaii's High School Students

HTA awarded ClimbHI the contract to develop and execute the visitor industry career motivational program and HTA's Work Wise Program, a visitor industry workforce development program targeted at public high school students interested in summer 2025 part-time work. HTA is in the process of contracting with the vendor.

### **Product Development**

**Overview:** Develop, lead, assess, and optimize the development of new products and experiences. Leverage data and research to identify opportunities and areas for program development.

### EDA's Noncompetitive Travel, Tourism & Outdoor Recreation Grant

Staff submitted the bi-yearly progress report to EDA. Work continues with DLNR in managing and monitoring their contract for their 7 projects.

## **X. FINANCE BRANCH**

Contracts List: Pursuant to Hawai'i Revised Statutes §201B-7 (9), please note the below contracts executed during the month of October 2024.

**REPORT OF THE CEO**

November 26, 2024

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Contract No.	Contractor	Description	Contract Amount	Total Contract Value	Start Date	End Date
†25006	ASP North America LLC dba World Surf League Hawai'i	World Surf League 2024-2025	\$300,000.00	\$300,000.00	10/3/2024	6/30/2025
24009 S2	Hawai'i Visitors and Convention Bureau	Island Destination Brand Management and Marketing Services	\$2,880,000.00	\$4,580,000.00	10/7/2024	6/30/2025
Θ25014	Hawai'i Visitors and Convention Bureau	US Marketing Maui Recovery Plan 3	\$100,000.00	\$100,000.00	10/11/2024	11/30/2024
24012 S3	Allana Buick & Bers, Inc.	Professional Architectural & Engineering Services for the Hawai'i Convention Center Rooftop Repair	\$34,484.00	\$4,202,211.10	10/14/2024	12/31/2026
20010 S9	Anthology Marketing Group, Inc.	Public Relations, Communications, and Outreach Services	(\$74,900.00)	\$1,287,100.00	10/24/2024	12/31/2024
†25012	University of Hawai'i	Ho'oilina Scholarship Program	\$255,240.00	\$255,240.00	10/31/2024	7/31/2029
Contract Type: • Sole Source † Procurement Exemption Θ Emergency			\$3,494,824.00			

Other activities related to procurement, contracts, Hawai'i Convention Center, and Legislative Audit will be reported in the Budget, Finance, and Convention Center Standing Committee report at the HTA board meeting.

# **10**

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

**10**  
**Research Monthly Highlights**



# HTA REGULAR BOARD MEETING

Thursday, November 26, 2024

*Hō‘ike‘ike Noi‘i ‘Oihana Ho‘okipa*

Presentation and Discussion of Current Market Insights and  
Conditions in Hawai‘i and Key Major Hawai‘i Tourism  
Markets

Jennifer Chun

Director of Tourism Research



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

# Table of Contents

- Monthly Highlights
  - Hawai'i Airport Throughput
  - State TAT Collections
  - Estimated County TAT Collections
- Market Trends and Insights
  - Skift Travel Health Index
  - US Travel Association Dashboards
- Air Ticket Booking Trends

# October 2024 Highlights – Hawai‘i Airport Throughput

## Throughput by Week

State: Hawaii; Airport: All



## Hawaii Airports

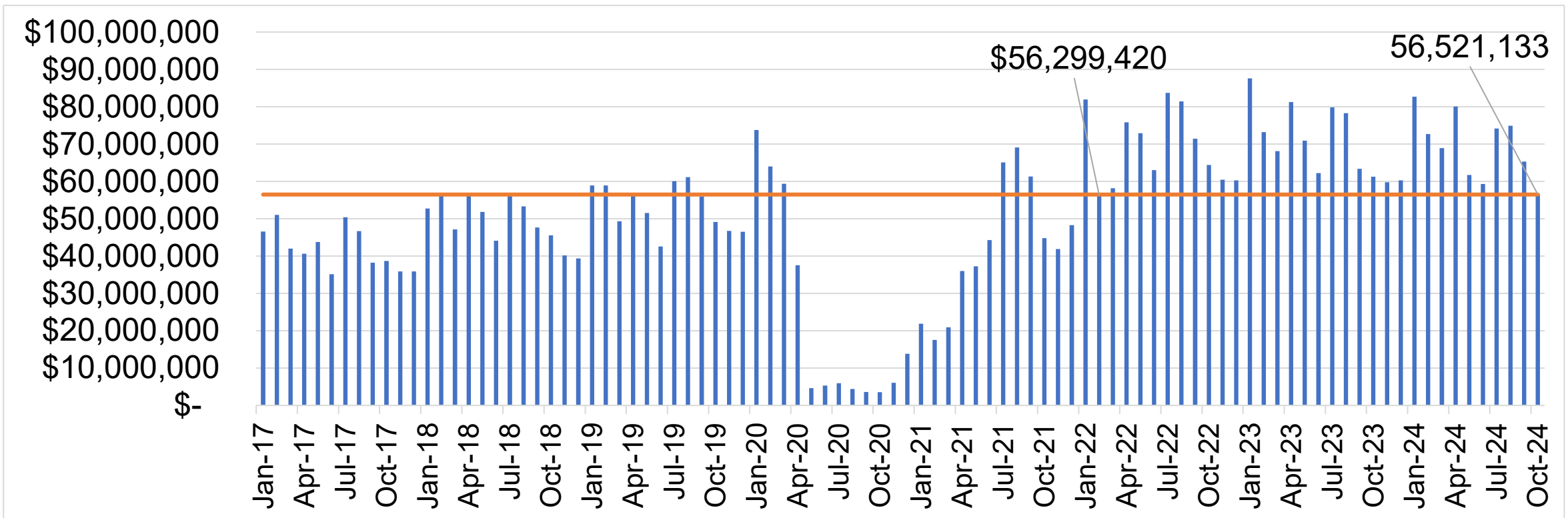
Throughput for the last 6 months, % change compared to 2023

	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24
All Airports	-4%	-4%	-2%	4%	2%	2%
Daniel K. Inouye International Airport	2%	2%	4%	4%	-2%	0%
Kahului	-19%	-19%	-19%	18%	44%	20%
Ellison Onizuka Kona International Airport	-5%	-5%	-2%	-5%	-7%	-5%
Lihue	-4%	-1%	-1%	-6%	-8%	-3%
Hilo International	1%	-2%	4%	-1%	-4%	-1%

Source: Transportation Security Administration by Tourism Economics

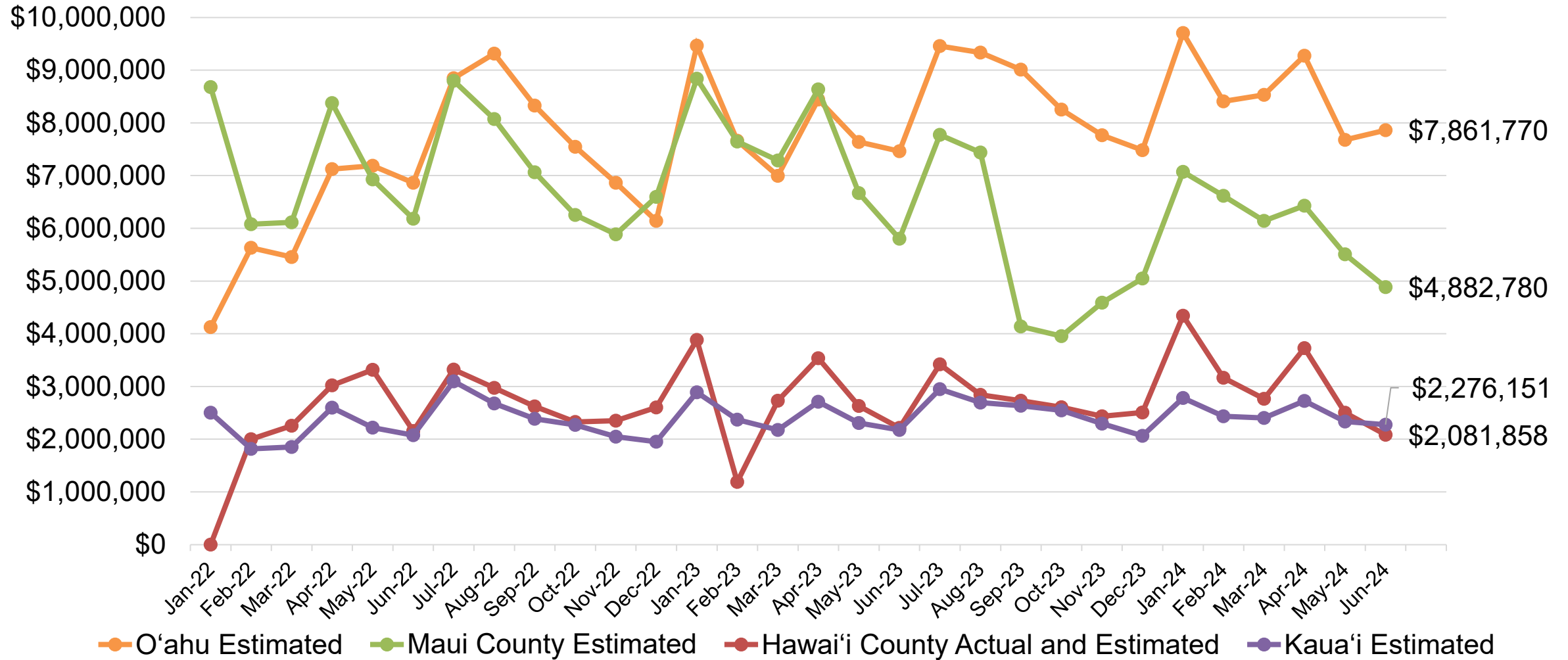
# October 2024 Highlights - State TAT Collections

- Preliminary October 2024 TAT Collections: \$56.5 million
- Preliminary YTD Fiscal 25 TAT Collections: \$270.9 million (-7.8%)
- YTD Fiscal 24 TAT Collections: \$282.8 million (-11.9 million)



Source: Department of Taxation

# Estimated County TAT Collections



Source: Department of Taxation Transient Accommodation Tax Base

# MARKET TRENDS AND INSIGHTS



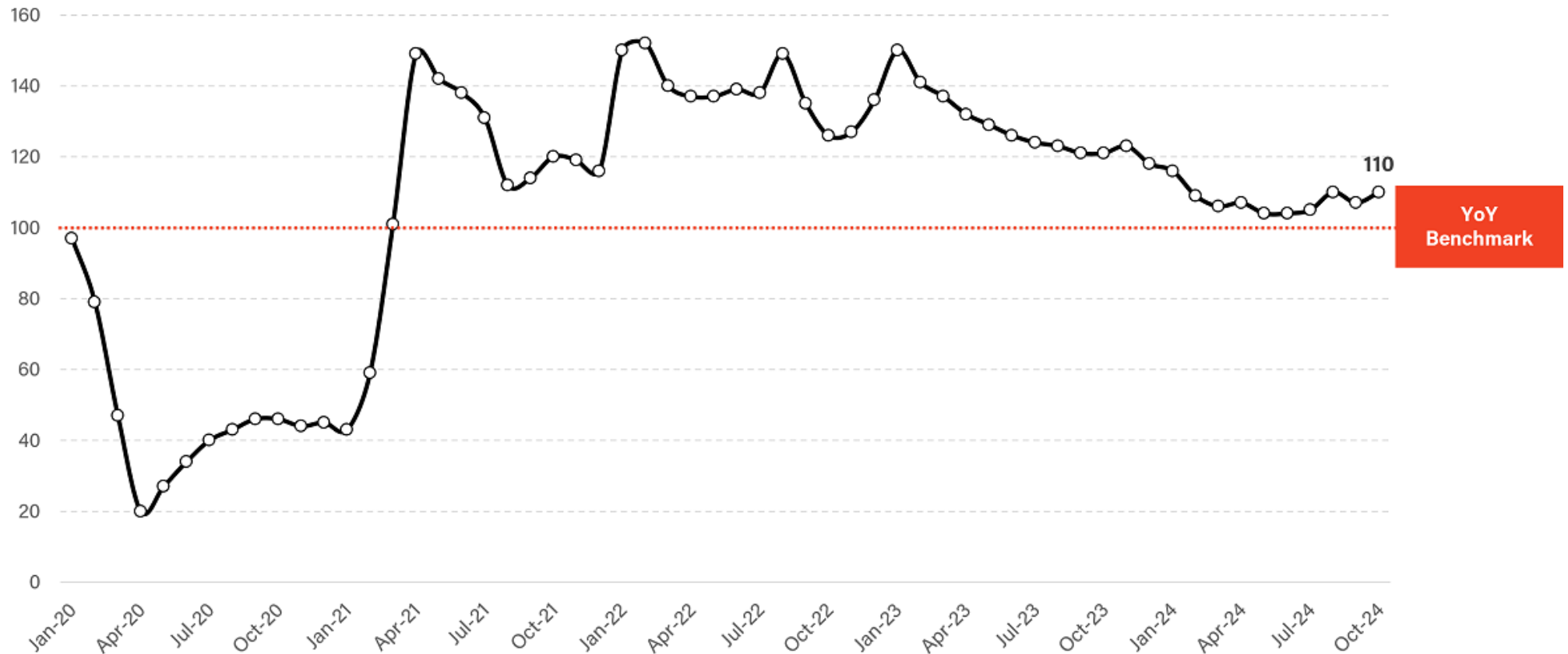
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# Skift Travel Health Index = 110

## The Travel Health Index, at 110 in October 2024 Shows Continued Travel Momentum

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



Source: Skift Research from partner data.

Source: Skift Research

# National Travel Indicators

September, 2024

Compare to Prior Year or 2019  
Previous Year



## Travel Spending\*

(Tourism Economics)

**\$111.5B**

↗ +0.2%

September vs. Previous Year

↗ +2.2%

YTD vs. Previous Year



## Air Passengers

(TSA)

↗ +2.2%

September vs. Previous Year

↗ +6.1%

YTD vs. Previous Year



## Overseas Arrivals

(NTTO)

↗ +4.5%

September vs. Previous Year

↗ +13.9%

YTD vs. Previous Year



## Hotel Demand

(STR)

↘ -2.0%

September vs. Previous Year

↗ +0.0%

YTD vs. Previous Year



## Short-term Rental Demand

(AIRDNA)

↗ +2.4%

September vs. Previous Year

↗ +7.7%

YTD vs. Previous Year

## Insights

Air passenger volume expanded 2% year-over-year in September after posting 6% growth in August.

Overseas arrivals continued to make gains, growing 5% in September after 8% in August. Overseas arrivals for the year through September have recovered to 86% of 2019 volumes.

Hotel room demand contracted in September, registering a 2% year-over-year decline, after expanding 2% in August.

Group room demand for the top 25 markets grew 7% year-over-year in September to finally recover above pre-pandemic levels.

Short-term rental demand grew 2% year-over-year in September, compared to 13% in August.

## Travel Indicators

% change relative to same month vs. Previous Year

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Travel Spending (Tourism Economics)	5.1%	5.6%	4.7%	1.3%	2.2%	0.8%	2.9%	4.8%	2.5%	1.6%	3.4%	0.2%
Air Passengers (TSA)	11.7%	10.6%	9.7%	5.8%	10.7%	7.3%	5.1%	7.7%	6.3%	5.2%	5.5%	2.2%
Overseas Arrivals (NTTO)	21.4%	23.9%	23.7%	24.0%	25.8%	25.4%	9.2%	17.5%	13.7%	9.2%	7.6%	4.5%
Hotel Demand (STR)	-1.3%	-0.8%	-1.3%	-1.2%	-0.8%	-2.0%	1.7%	2.0%	0.3%	0.0%	1.9%	-2.0%
Top 25 Group Hotel Demand** (STR)	2.1%	2.3%	-8.2%	9.1%	9.8%	-4.3%	11.3%	6.2%	1.6%	5.8%	6.2%	6.5%
Short-term Rental Demand (AIRDNA)	4.3%	5.8%	3.2%	0.2%	11.4%	10.4%	0.1%	11.2%	9.7%	8.4%	12.6%	2.4%
National Park Visits (National Park Service)	9.3%	8.1%	9.4%	0.7%	3.9%	12.0%	1.5%	-9.7%	-3.9%	-10.1%	-11.1%	-5.7%

-11.1% 25.8%



Compare to Previous Year

## Insights

In September, there was a healthy increase in control group retail sales (which exclude auto, gas and building materials), leaving real consumption on track for a 3.2% annualized gain in Q3. There was also a solid increase in food services sales, indicating that spending on discretionary services remains robust.

Upper-income households are driving gains in overall consumer spending. Meanwhile, the budgets of lower-income households are being squeezed by the high cost of essentials, including housing, reducing the amount of income available for discretionary spending. Lower-income households are unlikely to see significant relief from high housing costs anytime soon.

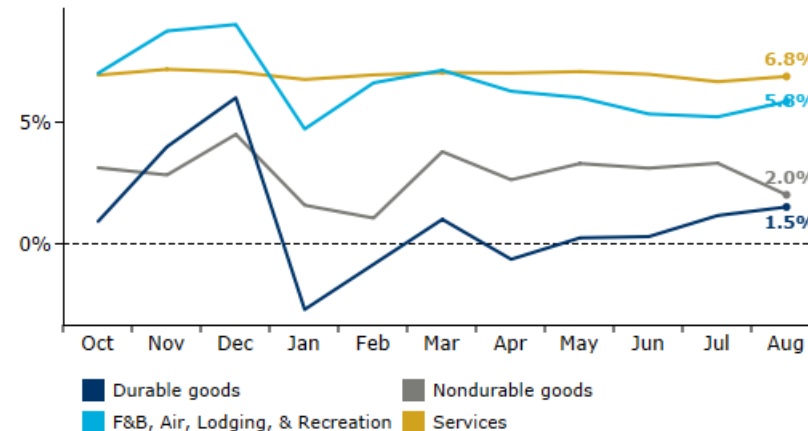
The September employment report was much stronger than expected, with job growth blowing past expectations, the unemployment rate declining, and wage growth accelerating. However, one month of strong payroll gains doesn't negate other signs of softening in the labor market, such as a low hiring rate, a low quits rate and deteriorating consumer perceptions of the labor market.

Most measures of wage growth have converged around a pace that is consistent with the Fed's 2% inflation target, and Fed officials have said they no longer see wage growth and the labor market as a source of upward pressure on inflation.

Overall price inflation (CPI), continued to decelerate, reaching 2.4% in September. Meanwhile, travel prices (TPI) contracted (-1.3%) for the first time since June 2023, as a result of declining lodging prices and a steep fall in gas prices compared to last year.

## Consumer Spending

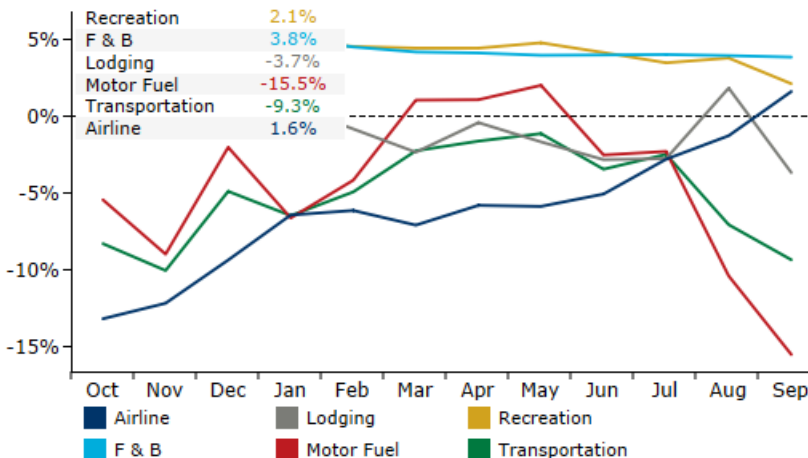
% change relative to same month vs. Previous Year, prior 12-month trend



Source: BEA

## Travel Price Index, Major Components

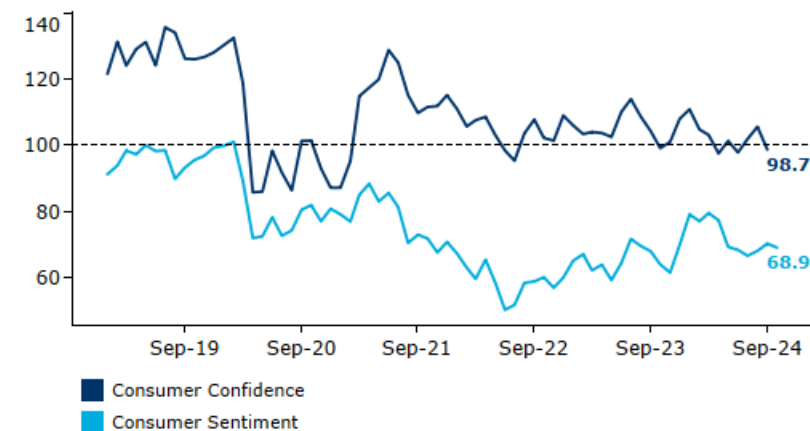
% change relative to same month vs. Previous Year, prior 12-month trend



Source: Tourism Economics

## Consumer Confidence & Sentiment Index

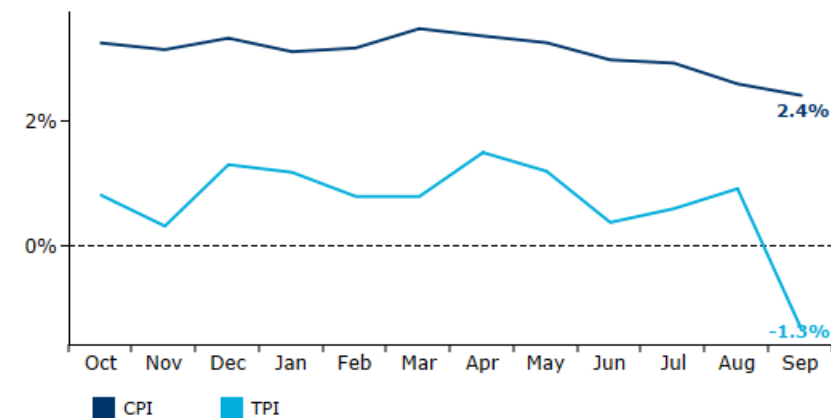
Index, 1985=100, prior 5-years



Source: Conference Board and University of Michigan

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

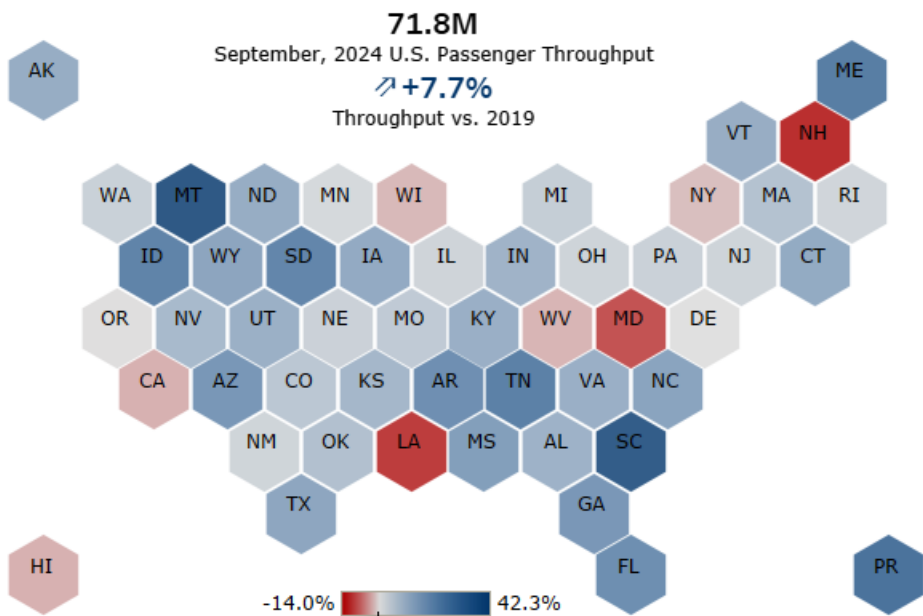
% change relative to same month vs. Previous Year, prior 12-months



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

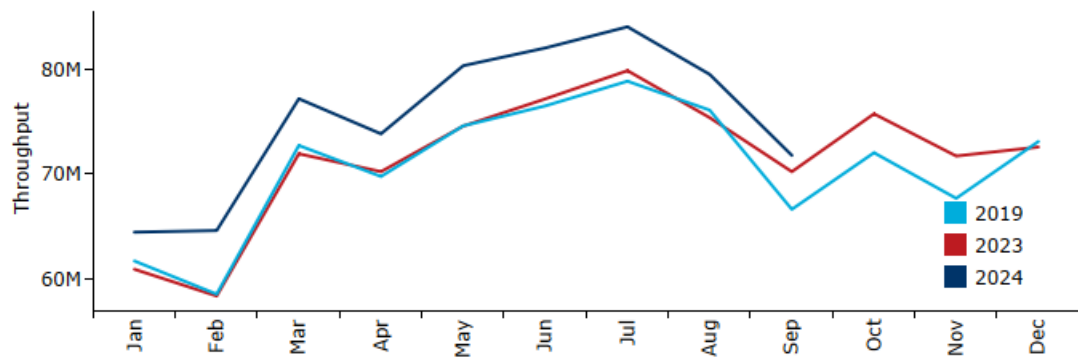
## September, 2024 Passenger Throughput by State

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)

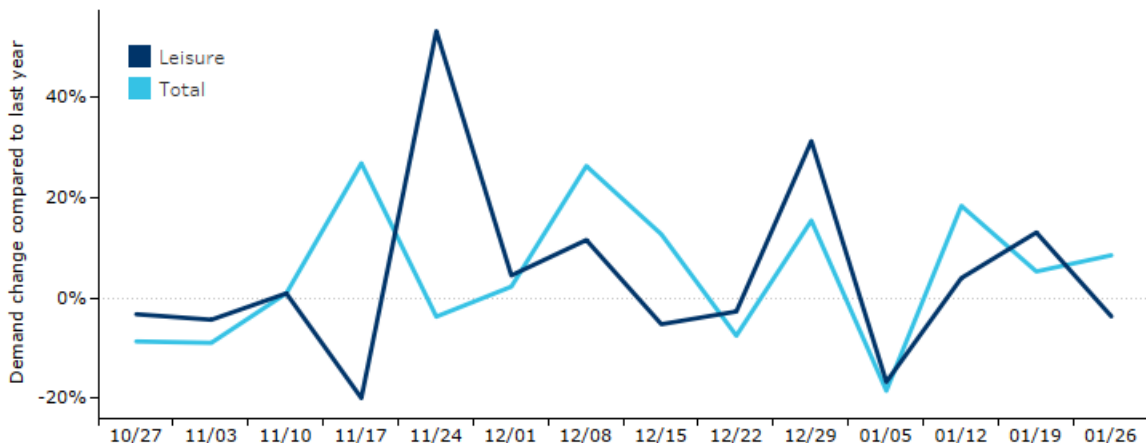
State/Territory Name  
Multiple values

	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24
Arizona	117	119	116	108	120	122	115	122	123	118	116	115	119
California	95	97	97	91	97	98	96	93	97	96	96	92	97
Colorado	104	106	106	98	113	112	107	110	107	107	106	106	106
Hawaii	95	96	97	92	103	104	99	99	94	95	96	92	97
Illinois	98	98	98	93	102	100	96	97	102	102	103	102	103
Indiana	109	109	106	98	114	114	108	112	110	112	107	109	111
Kentucky	109	106	109	102	112	115	108	112	113	110	110	108	112
Massachusetts	101	104	103	94	107	104	101	102	104	105	107	106	107
Michigan	101	98	102	92	107	107	97	102	102	105	101	103	104
Minnesota	100	100	102	93	105	107	100	105	106	107	109	104	102
Missouri	104	102	105	97	103	108	103	107	106	107	107	105	105
Montana	132	130	125	108	134	133	126	125	131	139	134	136	142
Nevada	106	116	107	109	112	117	111	111	112	110	110	107	110
New Jersey	106	105	108	99	116	114	109	106	108	105	105	104	103
New York	92	96	101	95	102	102	101	96	95	99	101	98	98
North Carolina	111	110	110	103	121	120	121	112	118	117	117	113	116
Oregon	97	100	102	91	97	102	97	101	101	102	101	99	100
Pennsylvania	98	96	98	90	102	104	104	99	102	104	103	104	104
Puerto Rico	128	130	129	115	129	136	126	128	141	141	138	134	132
South Dakota	113	112	117	104	131	132	129	127	119	121	119	122	125
Texas	115	114	116	108	122	119	116	120	120	116	112	111	115
Virginia	111	107	109	101	113	114	112	105	110	107	109	108	112
Washington	101	101	103	91	104	107	99	100	102	104	103	101	104
United States	105	105	106	99	104	110	106	106	108	107	107	104	108



## U.S. Hotel Leisure Demand Pace

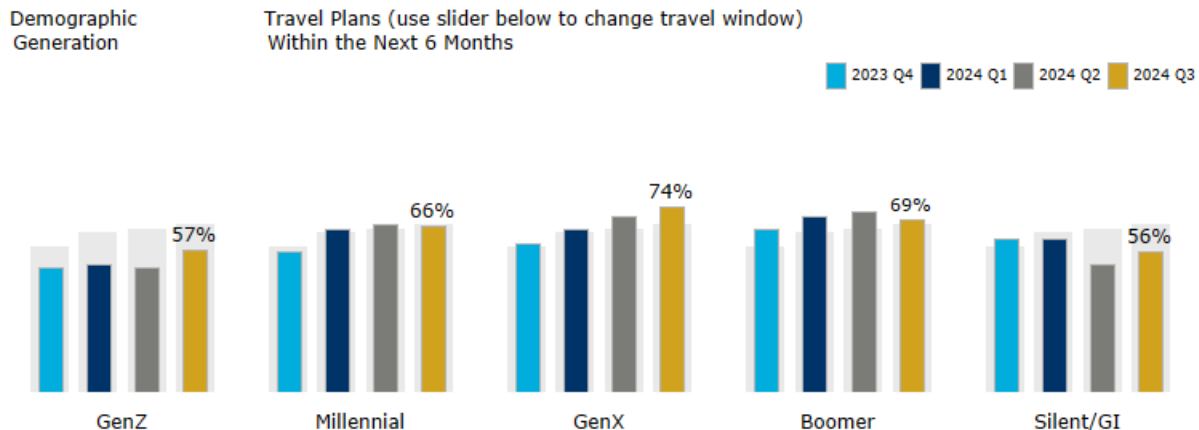
Leisure hotel booking pace vs same time last year, as of 10/21/2024



Source: Amadeus

## Planning Leisure Travel Within the Next 6 Months

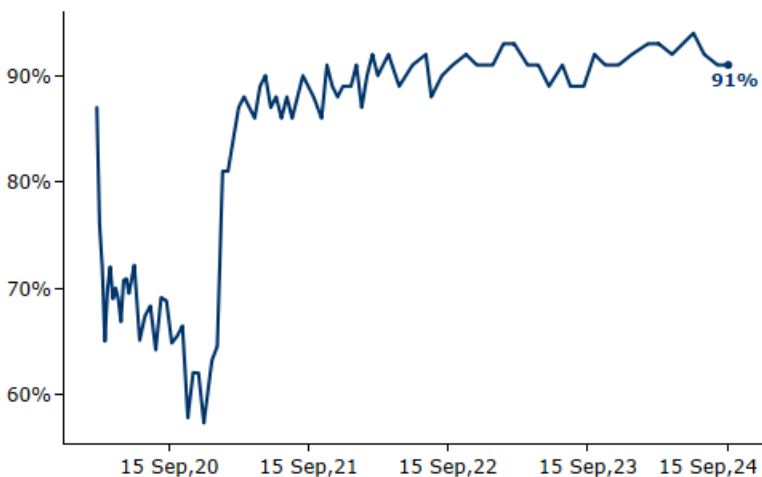
% of American Travelers



Source: MMGY Global's Portrait of American Travelers (released Q3 2024)

## Consumer Travel Sentiment

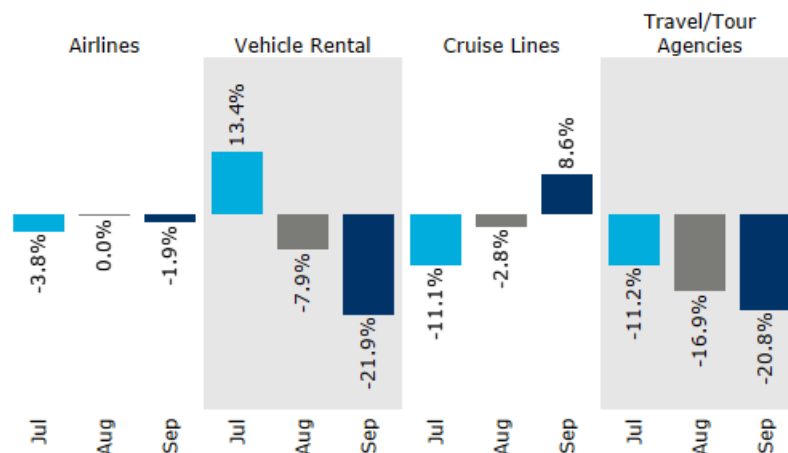
Travelers with Travel Plans in the Next Six Months



Source: Longwoods International

## US Consumer Credit Card Spend

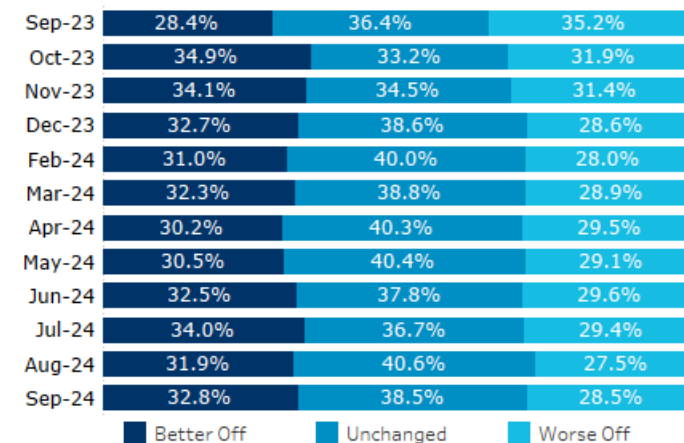
3-month trend, % change YOY



Source: TransUnion

## Consumer Travel Sentiment

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



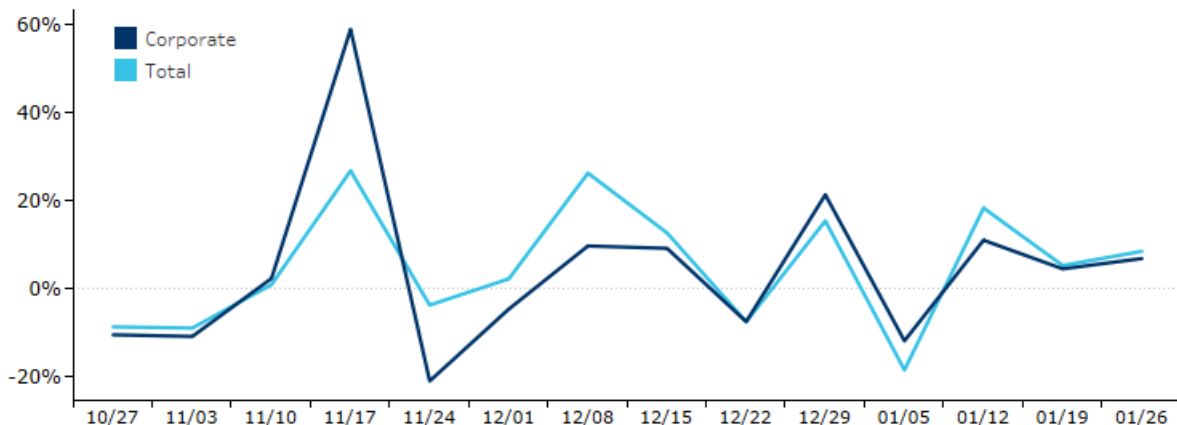
Source: Future Partners

# Domestic Business Travel

September, 2024

## U.S. Hotel Business Demand Pace

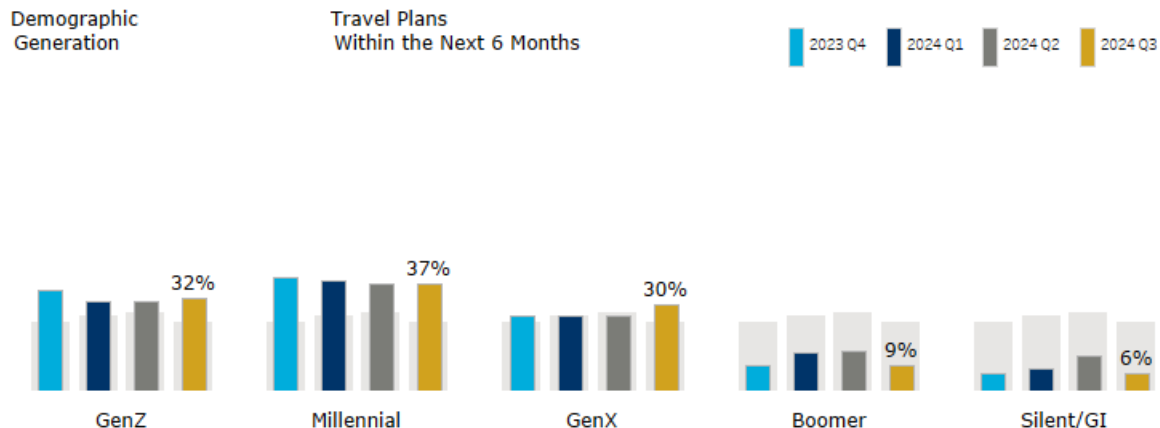
Business hotel booking pace vs same time last year, as of 10/21/2024



Source: Amadeus

## Planning Business Travel Within the Next 6 Months

% of American Consumers



Source: MMGY Global's Portrait of American Travelers (released Q3 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

## Insights

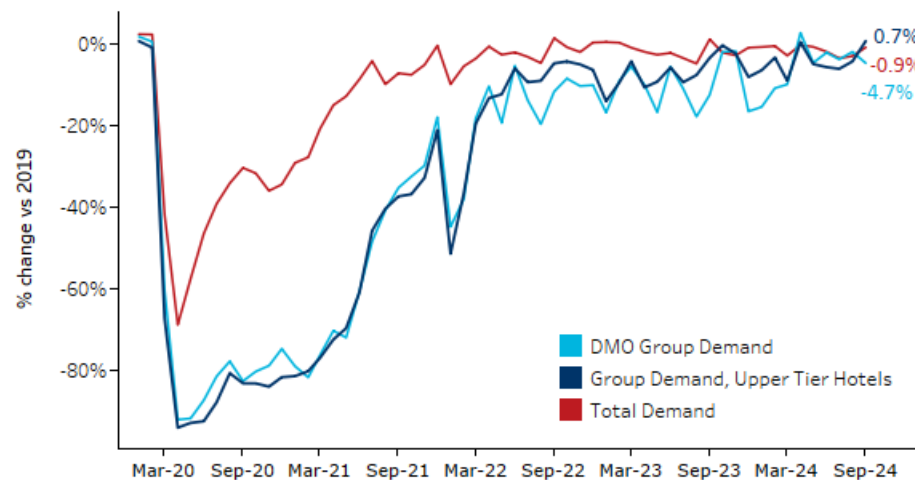
DMO group demand in September slipped to 5% below 2019 levels, compared to 2% below 2019 levels in August.

DMO/CVB pace for room nights on the books as of October 2024 improved from the September readings for the first quarter of 2025.

The majority of meeting planners (55%) in September were optimistic about the outlook for recovery.

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

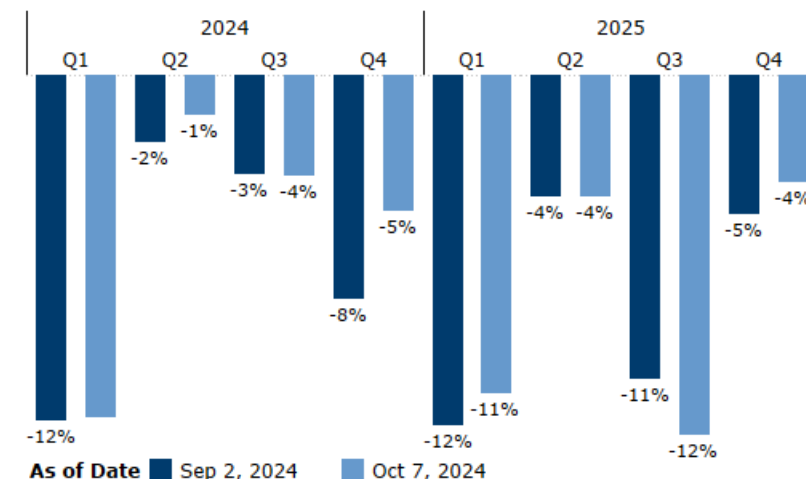
Group demand, % change vs 2019



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

## DMO/CVB Room Nights on the Books

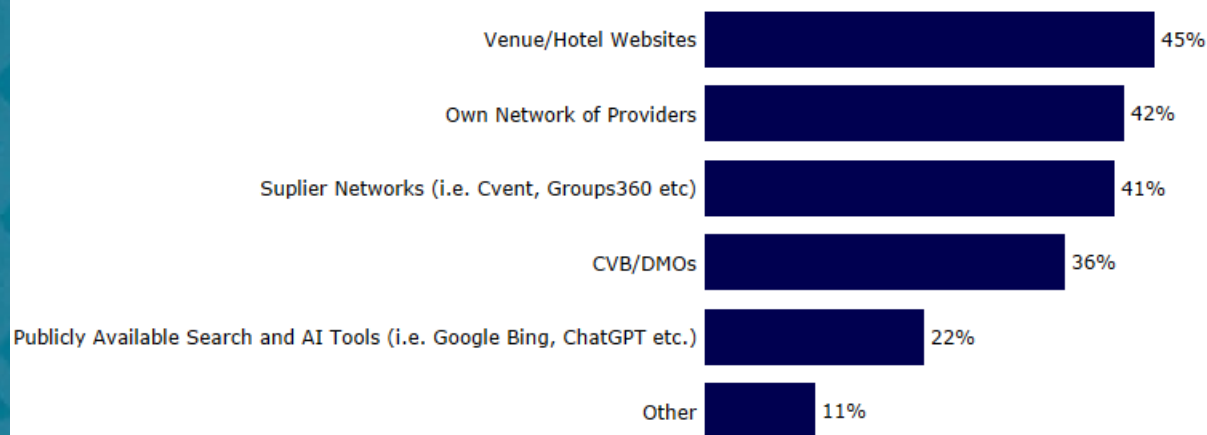
Pace for future dates, relative to the same period in 2019



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

## Sourcing of Meeting & Event Venues

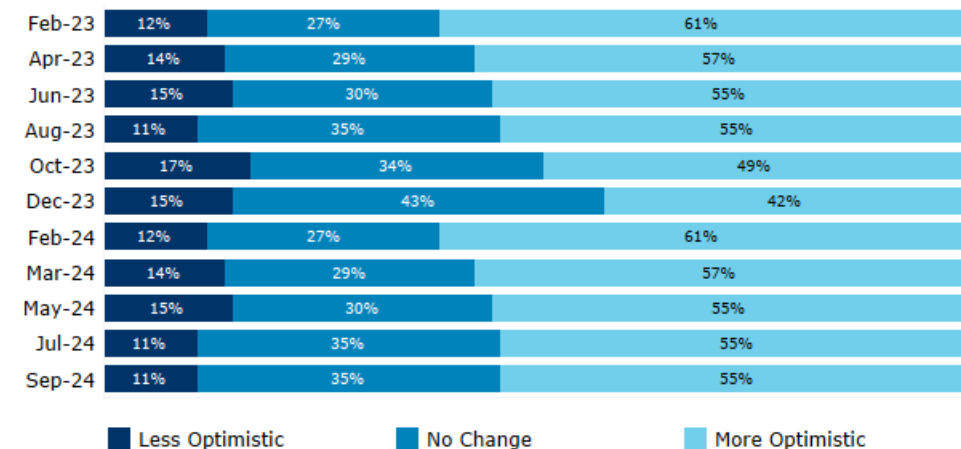
How do you source meeting venues and accommodations (select all that apply)?



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

## Meeting Planner Outlook

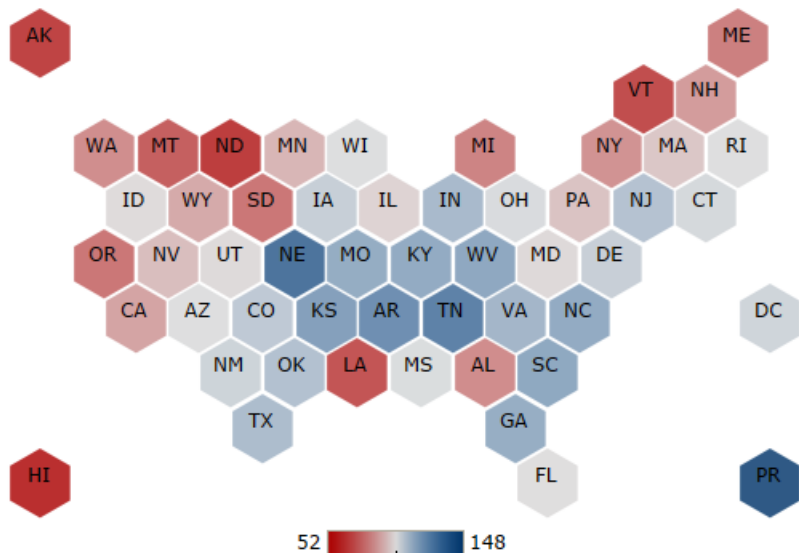
How the outlook for recovery has changed among meeting planners the past six weeks



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

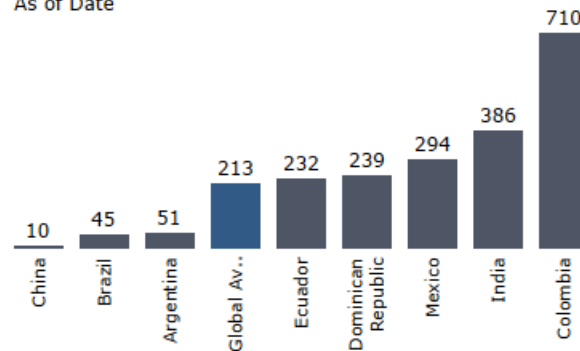
## Overseas Arrivals to U.S. by State (+PR)

Visitor arrivals for September, 2024, Index (2019 = 100), based on first intended address



## Visa Interview Wait Times, Avg. Days

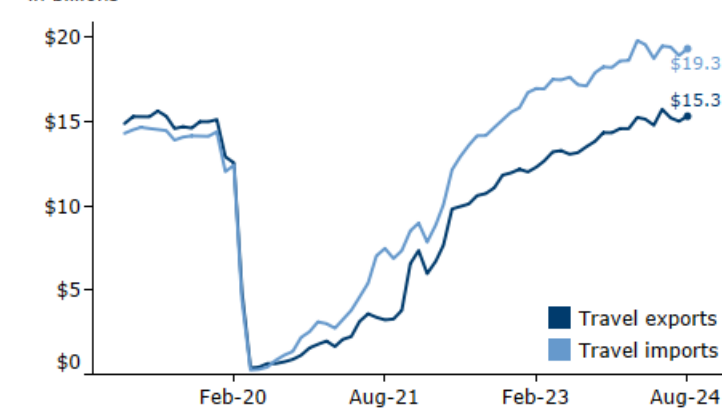
As of Date October 29, 2024



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

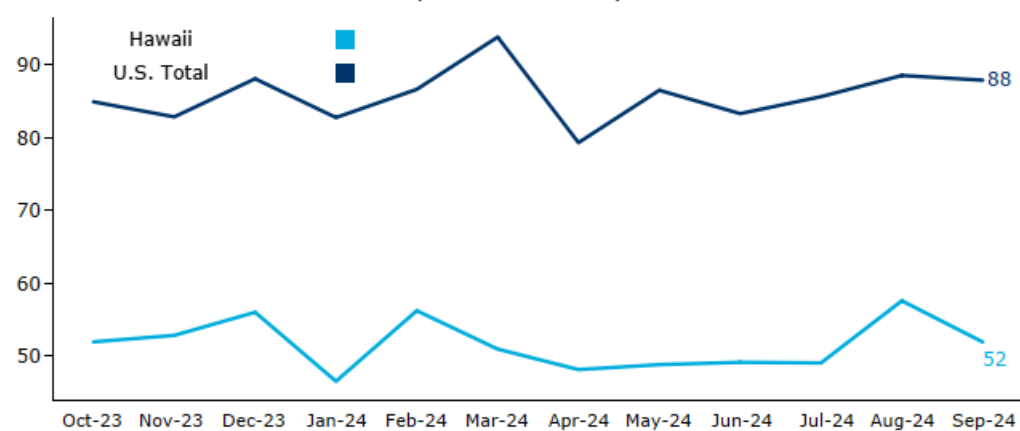
in billions



Source: NTTO

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

Visitor arrivals to U.S. Total & Hawaii, (Index 2019 = 100), based on first intended address



## International Arrivals to U.S. Total

Visitor arrivals to U.S. Total, (Index 2019 = 100), based on first intended address

	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24
Total Overseas	84	85	83	88	83	87	94	79	86	83	86	89	88
Brazil	94	96	83	89	79	89	78	85	95	85	91	89	94
Canada	90	104	99	91	106	106	101	96	102	95	95	91	
Canada (air)	107	113	105	101	113	111	108	109	116	104	107	104	
France	87	93	90	103	95	99	93	101	94	81	81	87	90
Germany	92	94	89	94	91	94	122	84	102	81	95	107	93
India	136	136	130	149	153	161	159	141	131	135	143	168	151
Mexico	86	84	81	78	97	92	85	79	88	98	92		
Mexico (air)	115	121	115	117	120	127	158	91	118	117	119	134	123
UK	81	84	84	91	89	84	98	73	80	75	84	85	88
China	48	50	58	58	45	50	60	54	53	52	55	58	67
Colombia	107	108	107	119	112	104	137	76	110	115	118	117	111
Dominican Republic	105	97	105	109	123	114	155	87	115	108	113	114	107

45 168

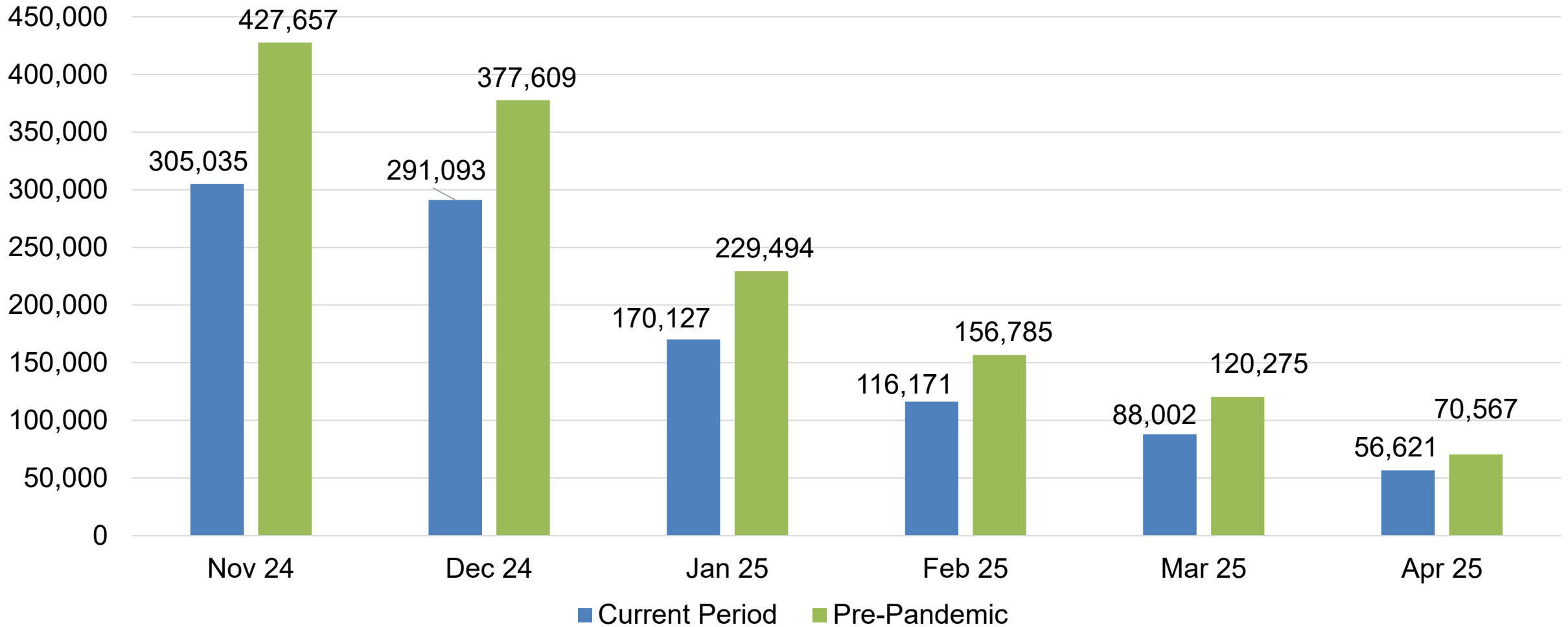
# ARC/FORWARDKEYS DESTINATION GATEWAY AIR BOOKING TRENDS



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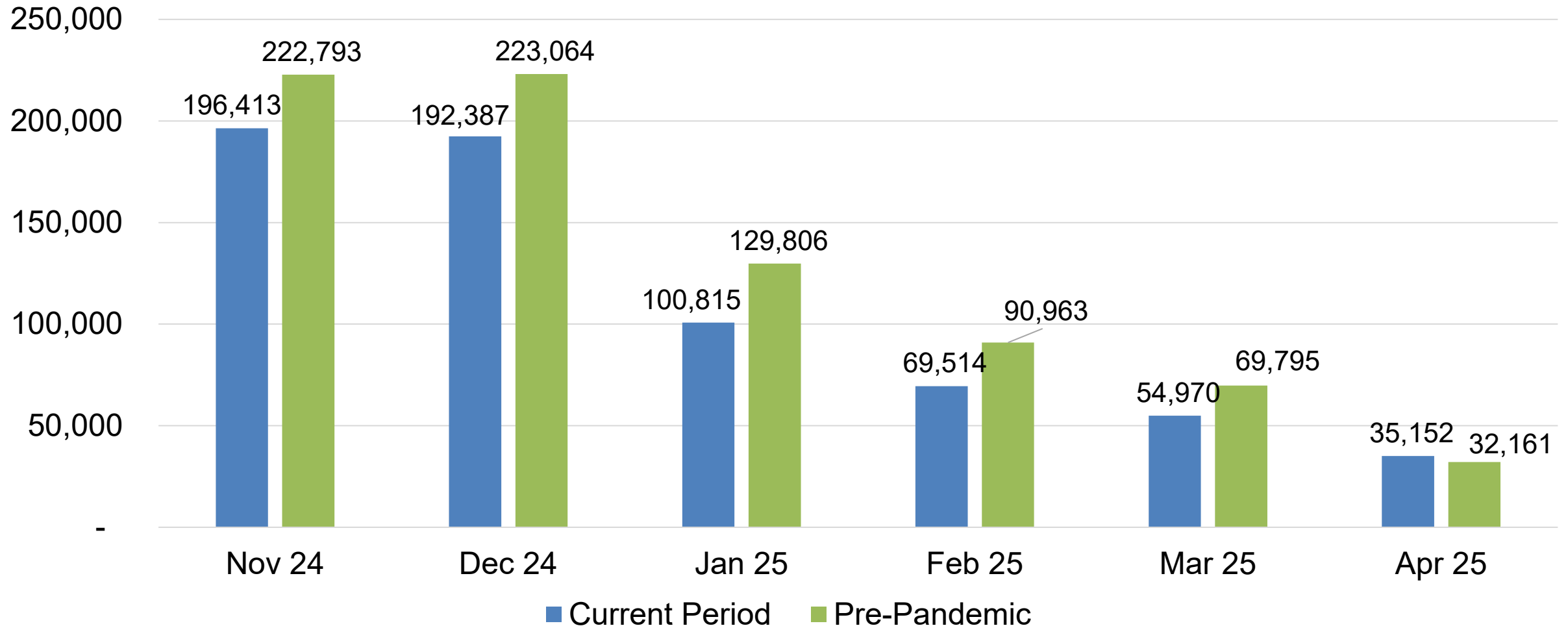
# Six Month Outlook: All Markets



Source: ARC/ForwardKeys Destination Gateway

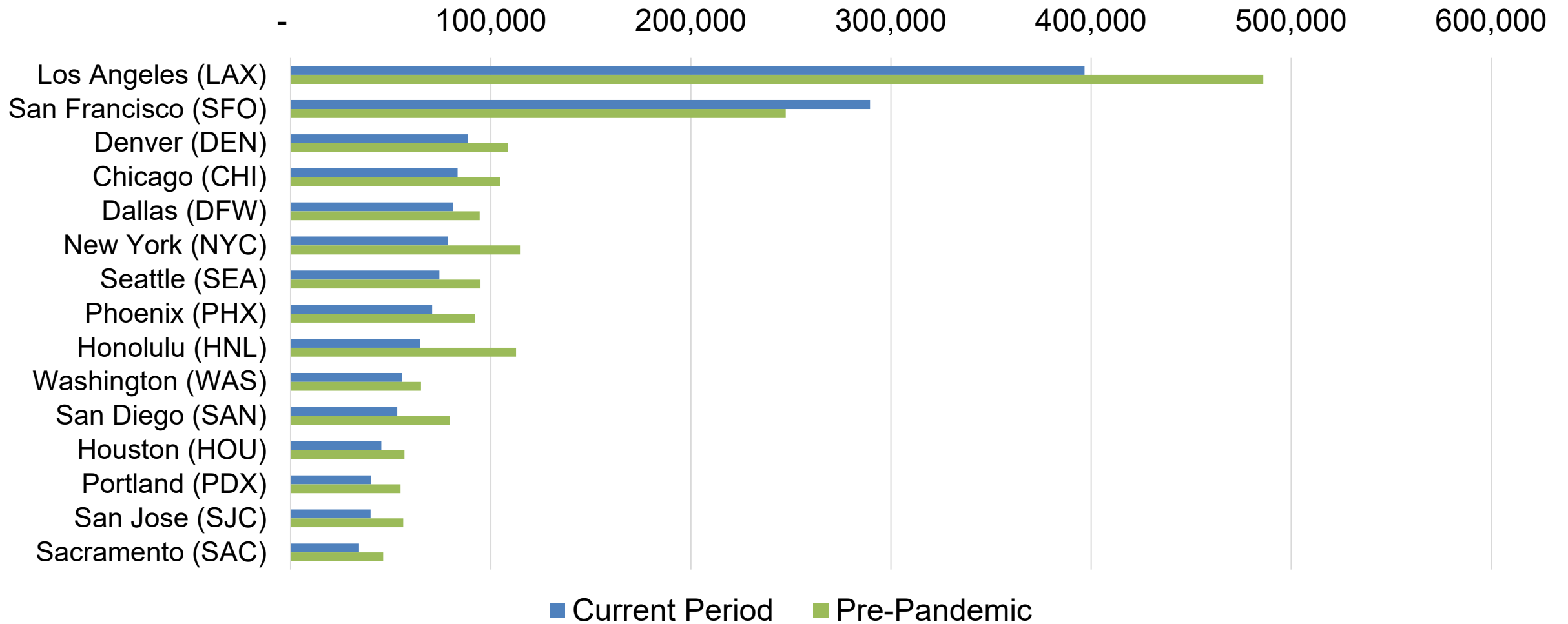


# Six Month Outlook: United States



Source: ARC/ForwardKeys Destination Gateway

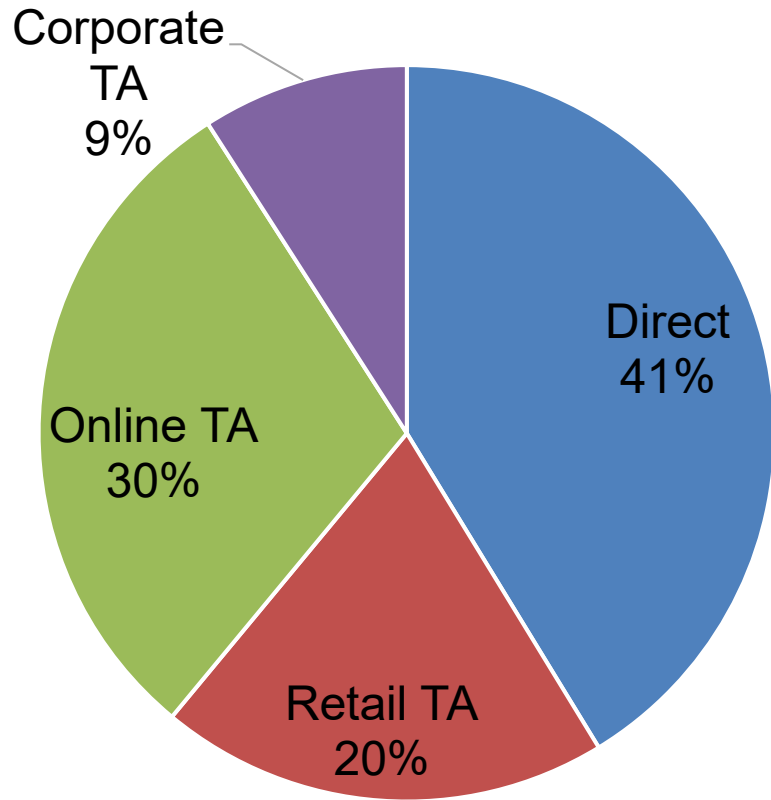
# Trip Origins: United States



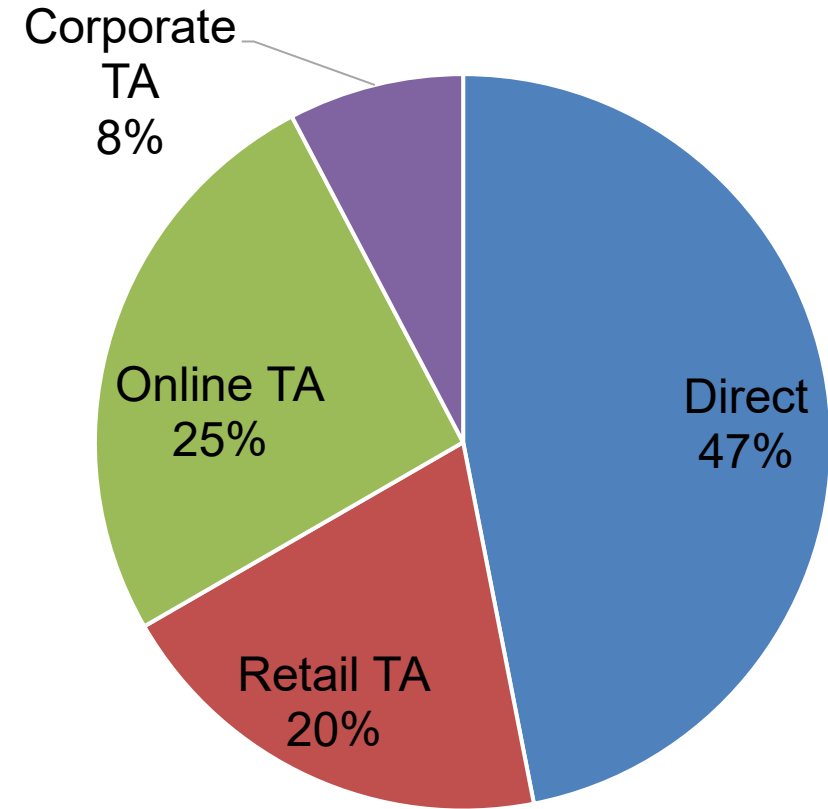
Source: ARC/ForwardKeys Destination Gateway

# Distribution Channel: United States

## Pre-Pandemic



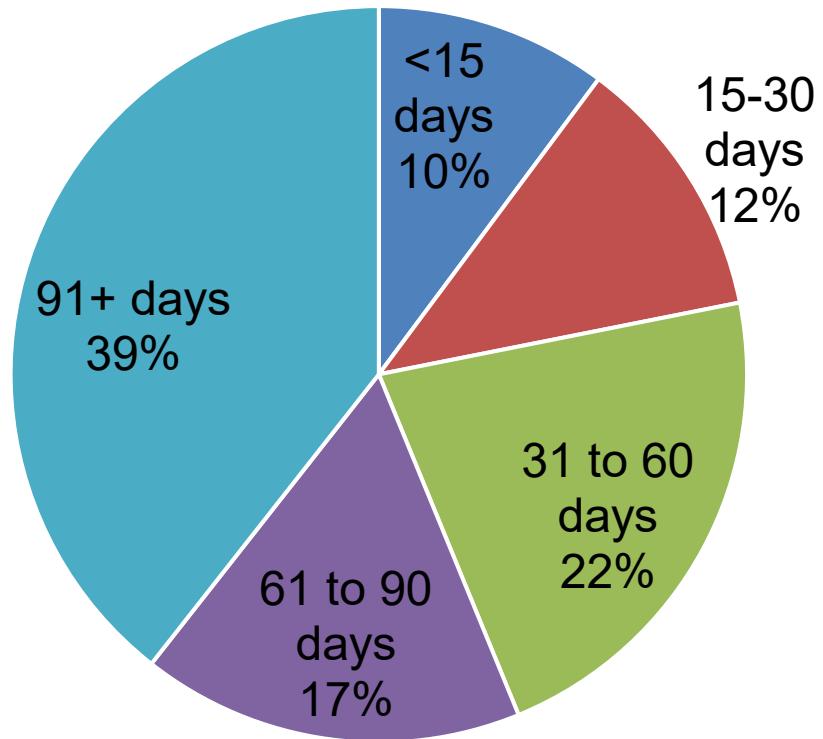
## Current Period



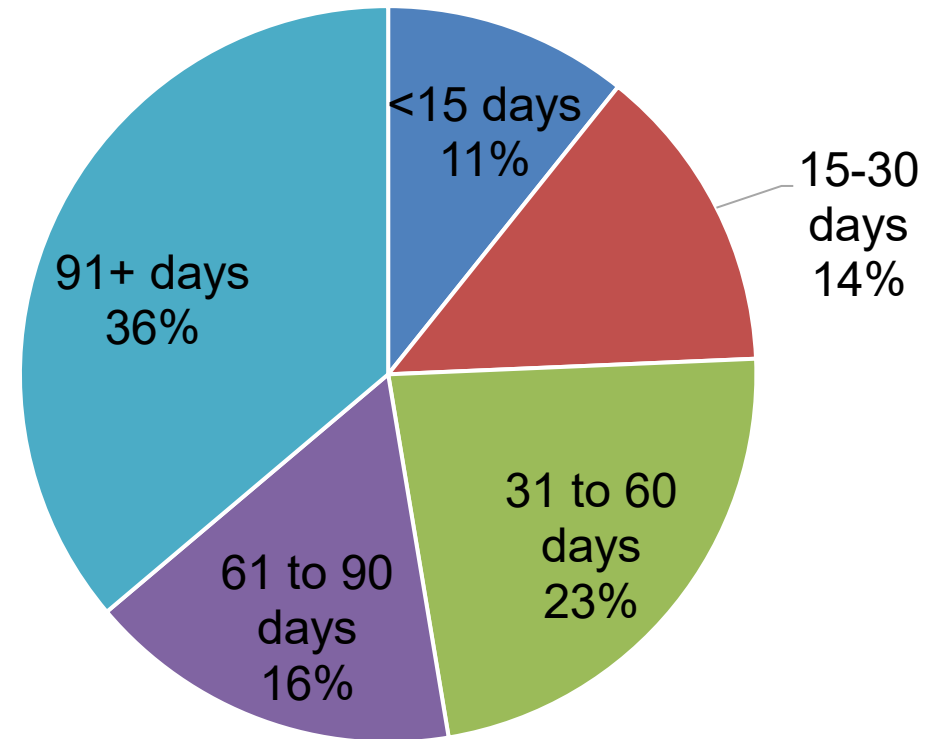
Source: ARC/ForwardKeys Destination Gateway

# Lead Time: United States

## Pre-Pandemic

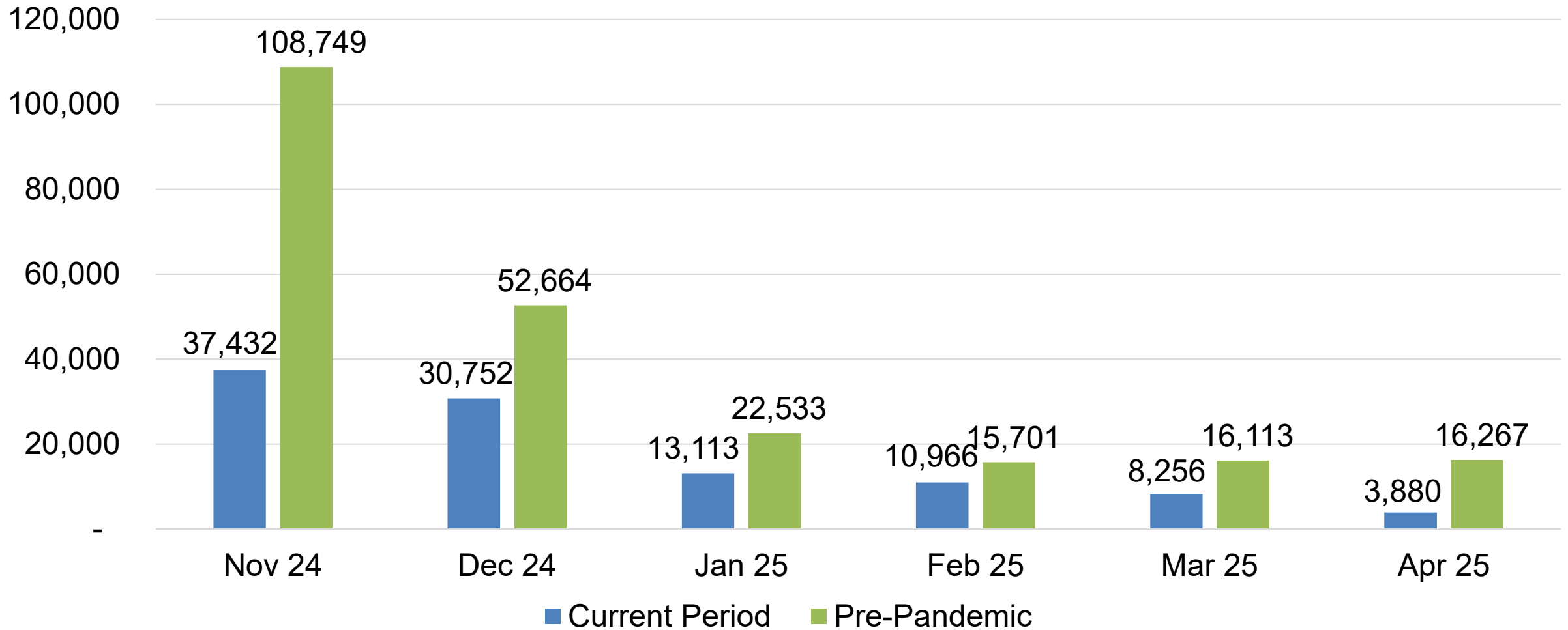


## Current Period



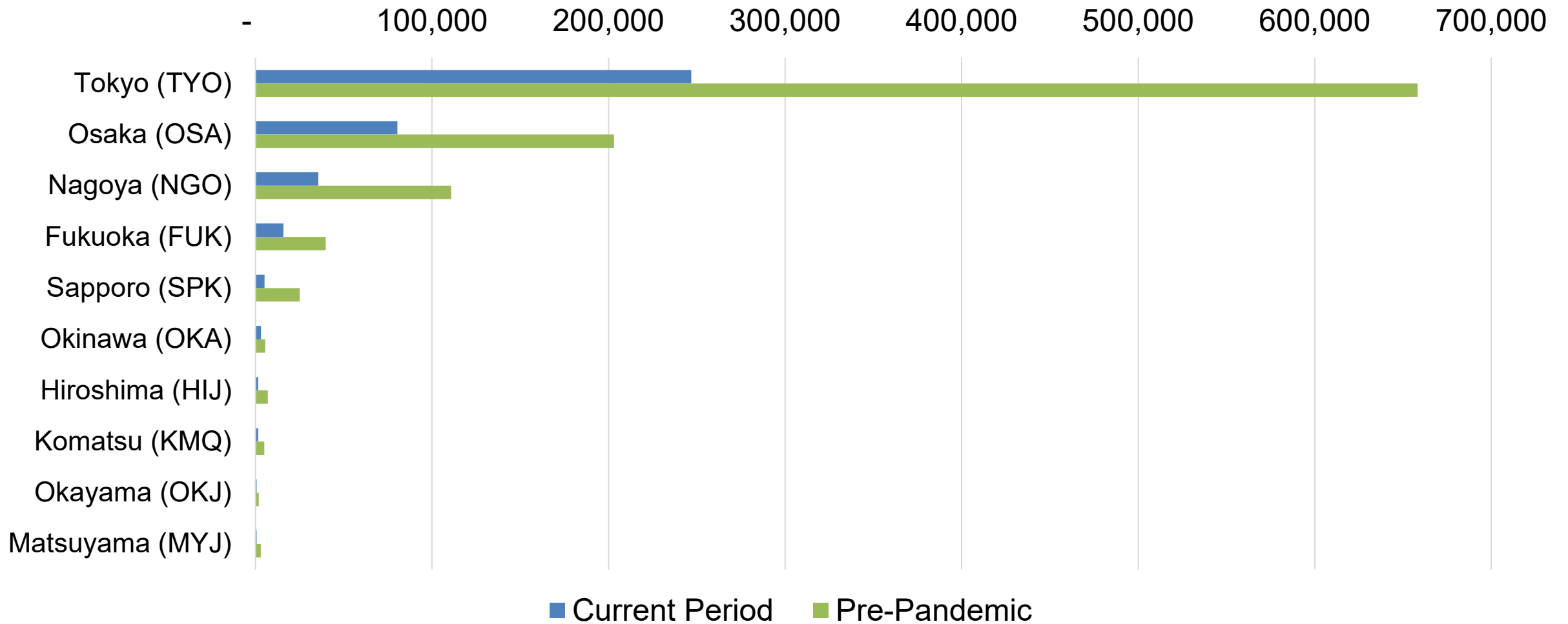
Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: Japan



Source: ARC/ForwardKeys Destination Gateway

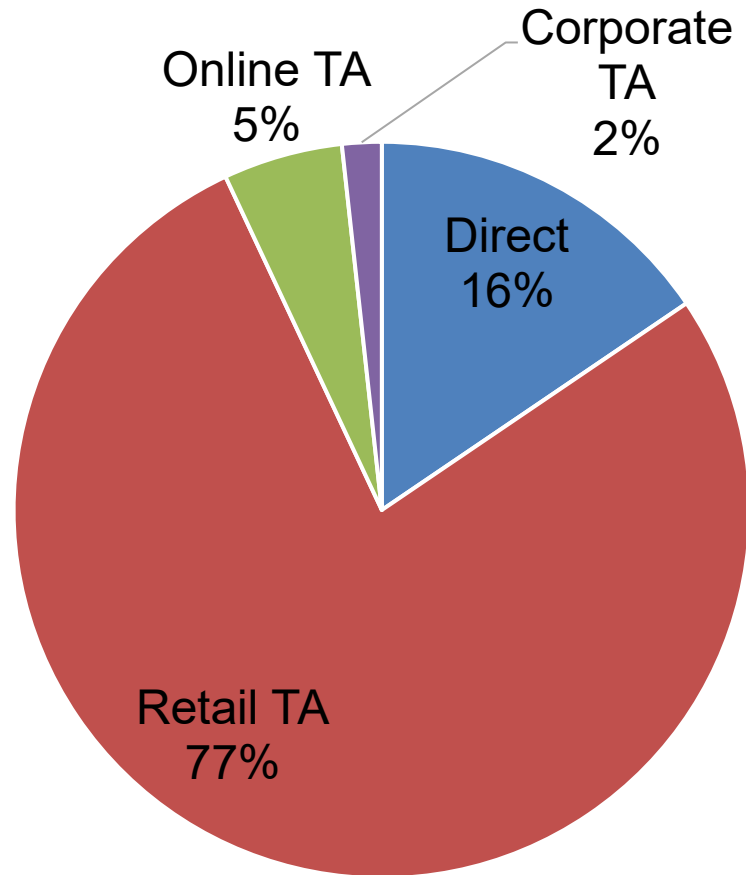
# Trip Origins: Japan



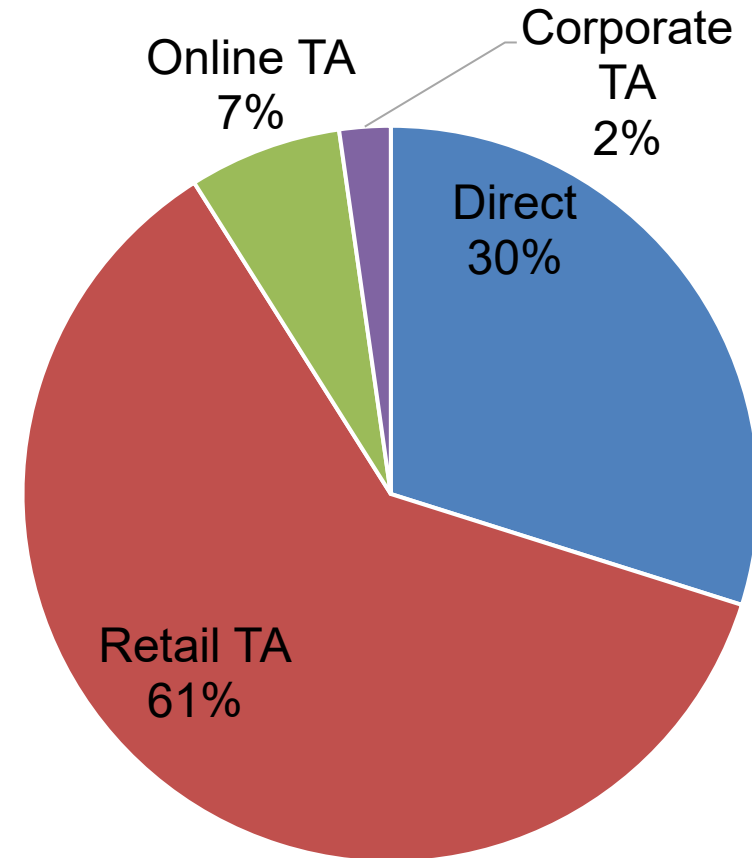
Source: ARC/ForwardKeys Destination Gateway

# Distribution Channel: Japan

## Pre-Pandemic



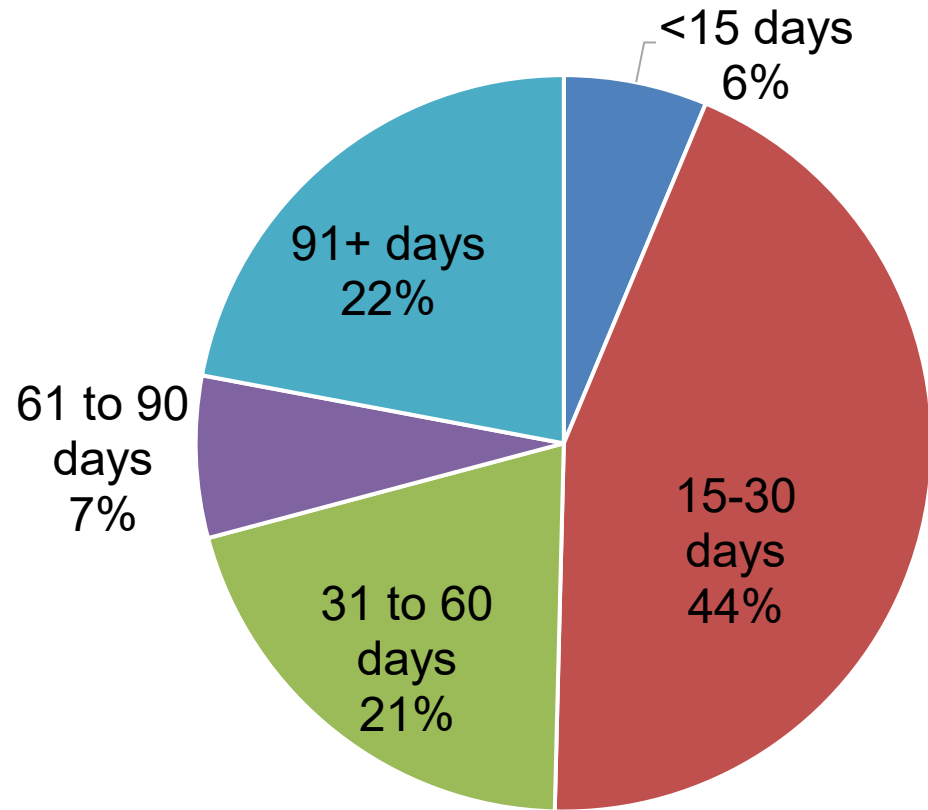
## Current Period



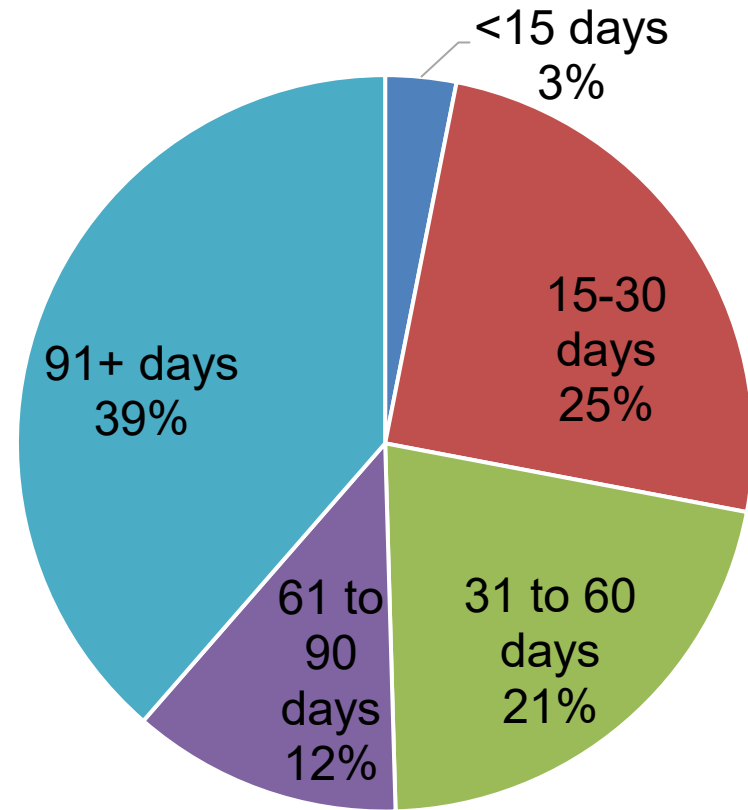
Source: ARC/ForwardKeys Destination Gateway

# Lead Time: Japan

## Pre-Pandemic



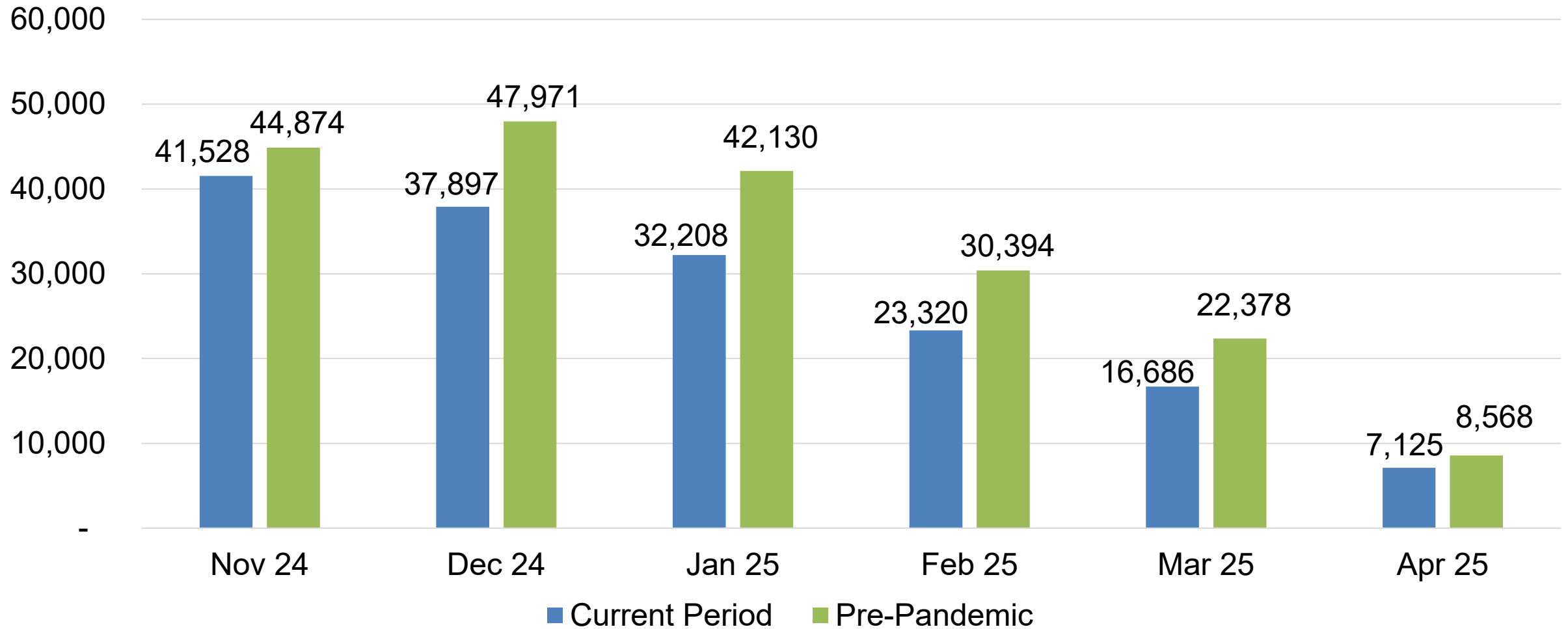
## Current Period



Source: ARC/ForwardKeys Destination Gateway

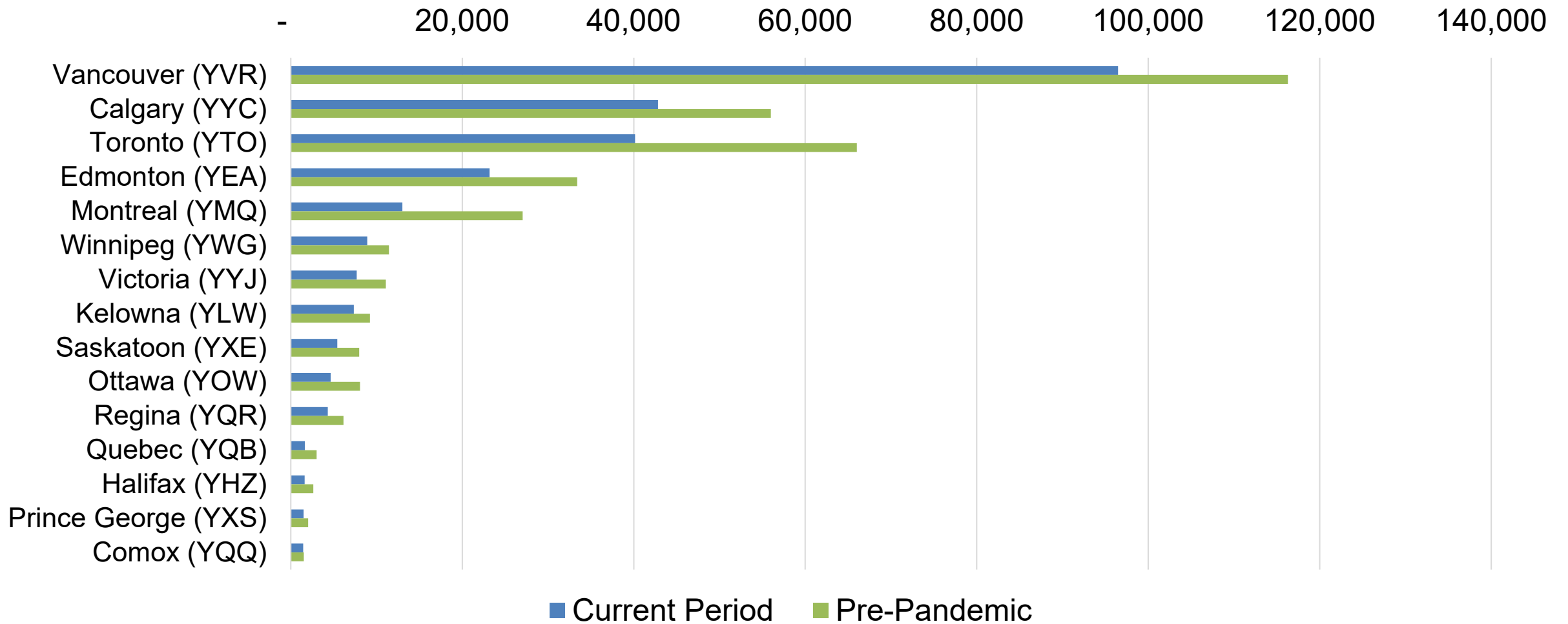


# Six Month Outlook: Canada



Source: ARC/ForwardKeys Destination Gateway

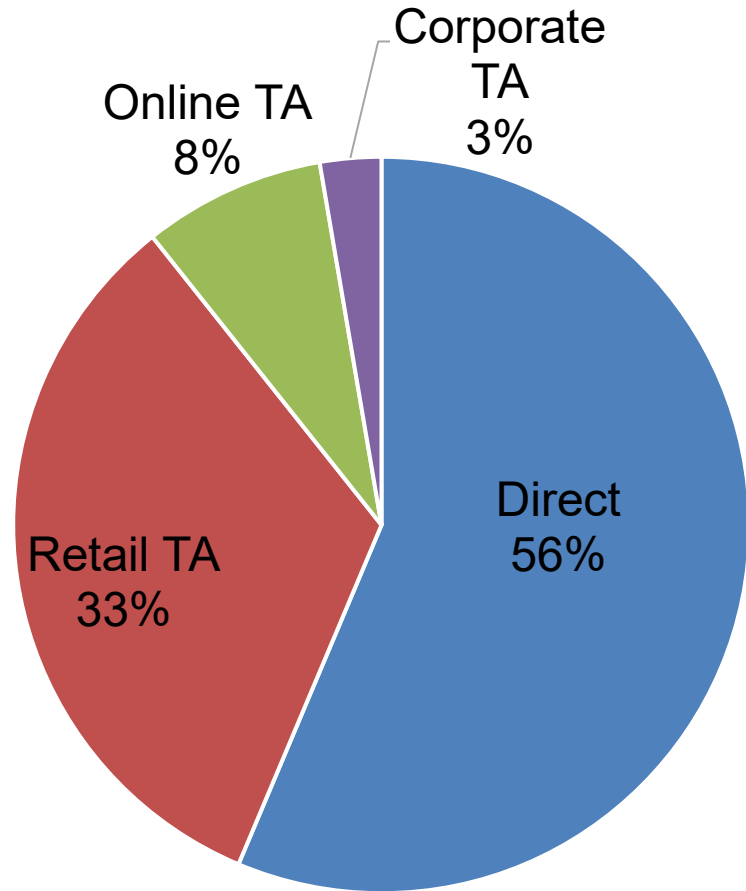
# Trip Origins: Canada



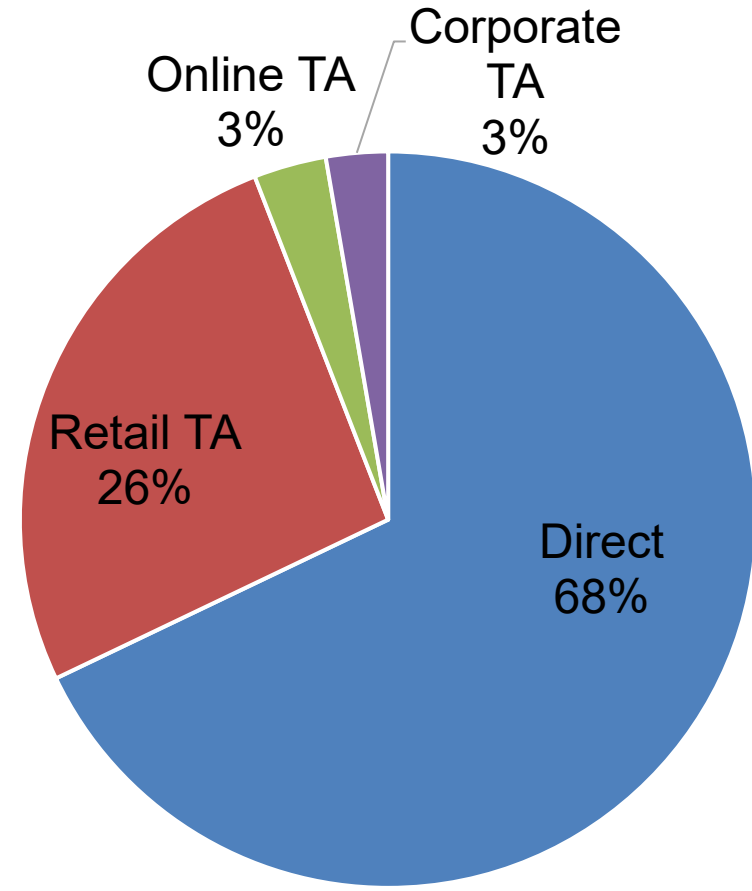
Source: ARC/ForwardKeys Destination Gateway

# Distribution Channel: Canada

## Pre-Pandemic



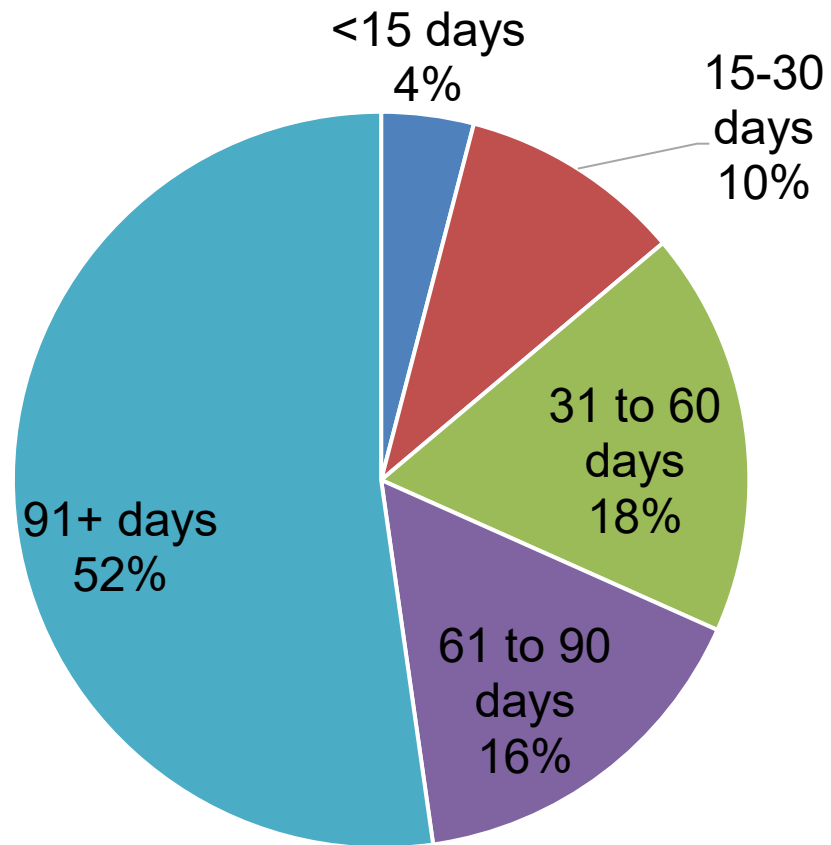
## Current Period



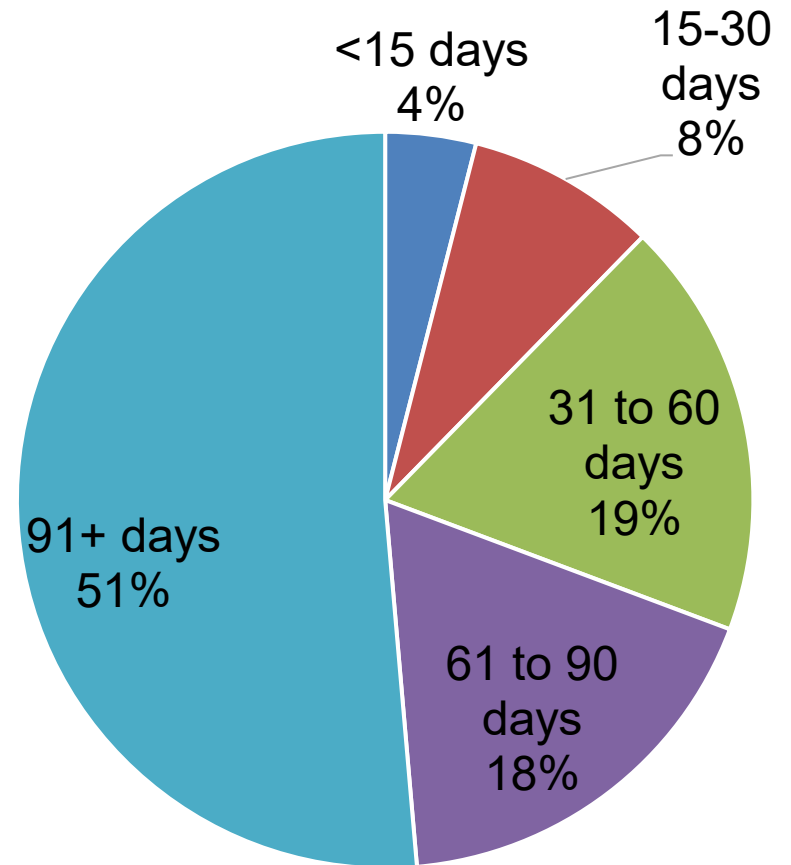
Source: ARC/ForwardKeys Destination Gateway

# Lead Time: Canada

## Pre-Pandemic

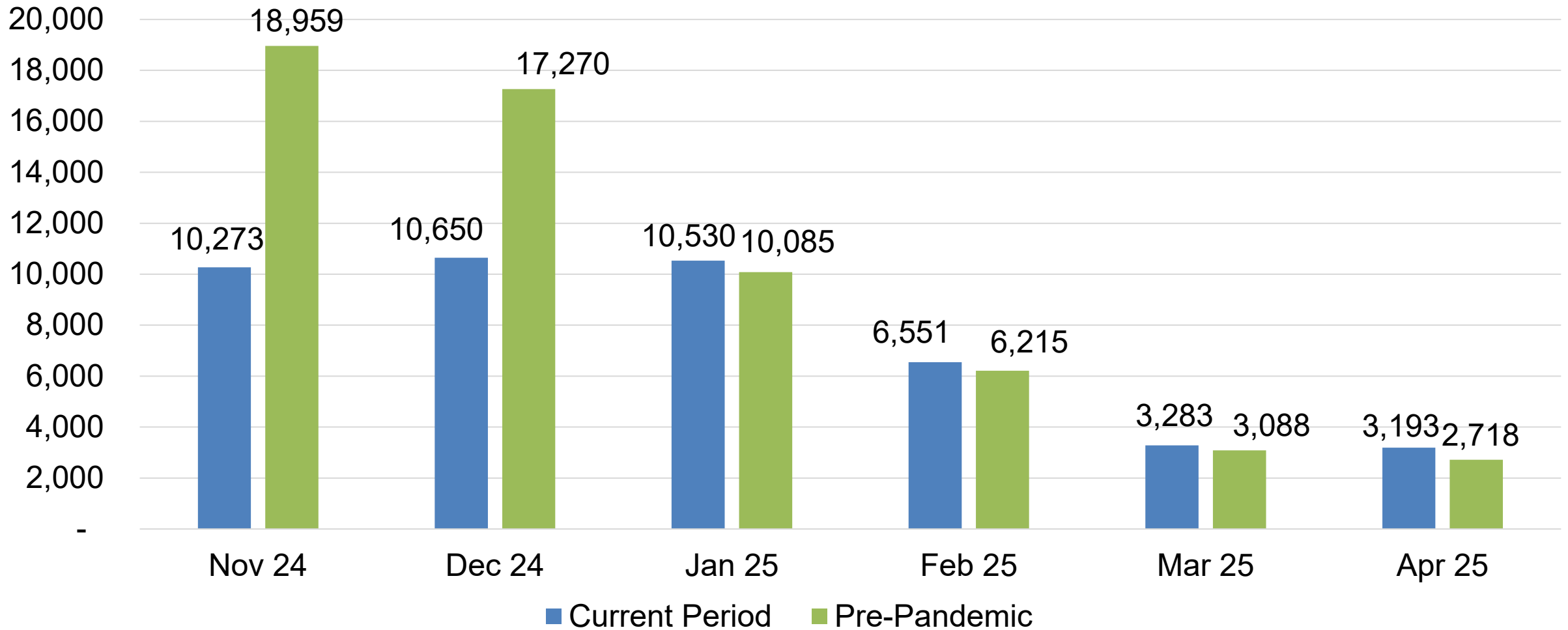


## Current Period



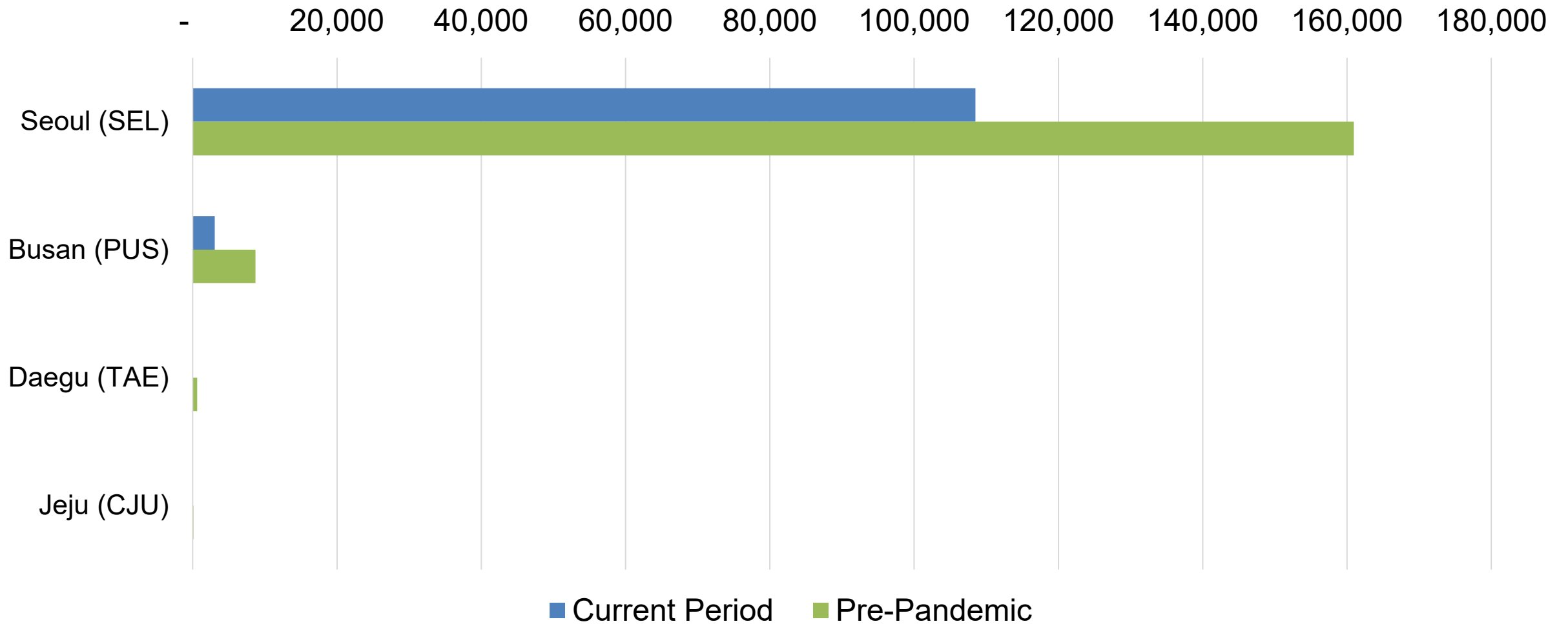
Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: Korea



Source: ARC/ForwardKeys Destination Gateway

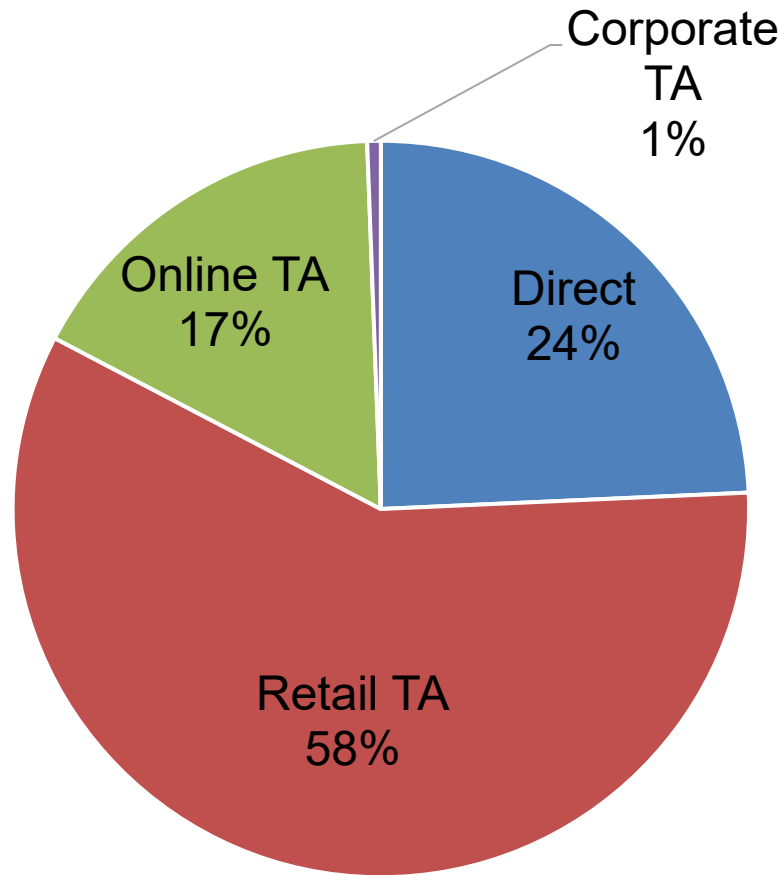
# Trip Origins: Korea



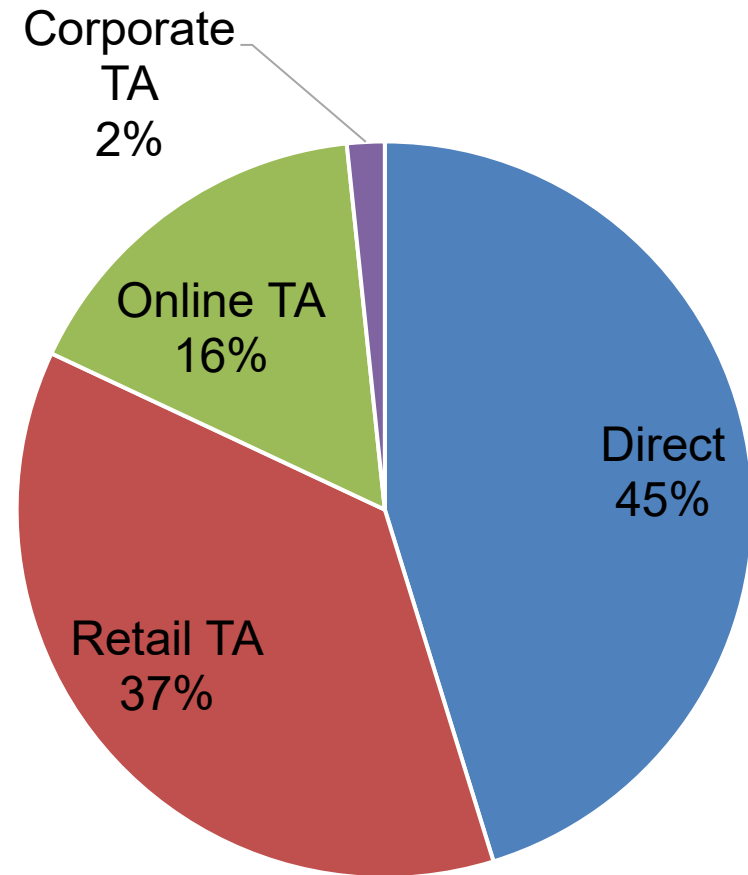
Source: ARC/ForwardKeys Destination Gateway

# Distribution Channel: Korea

## Pre-Pandemic



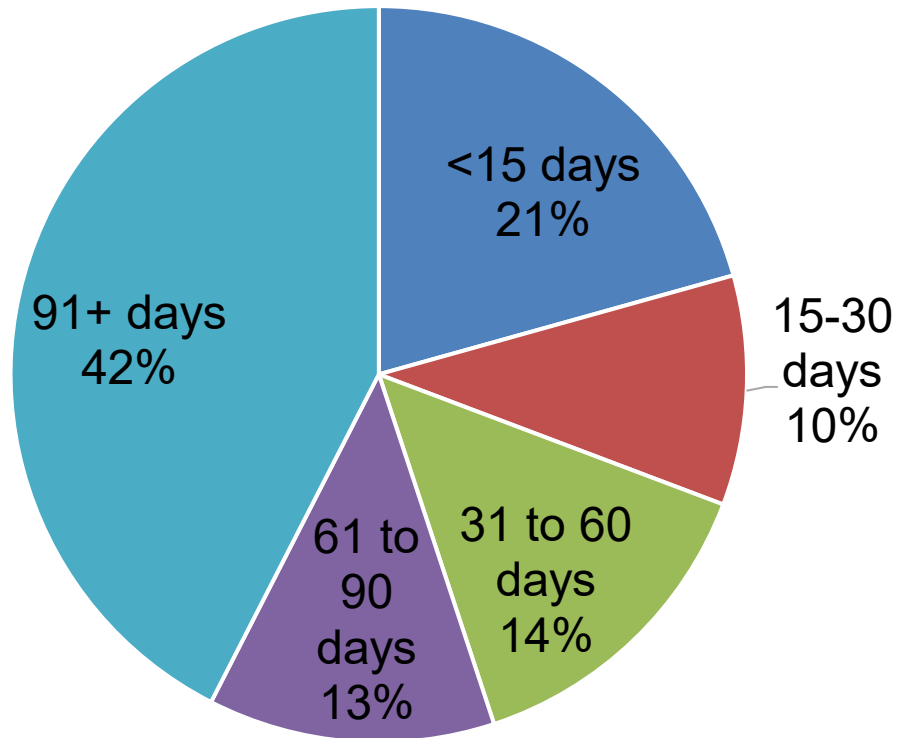
## Current Period



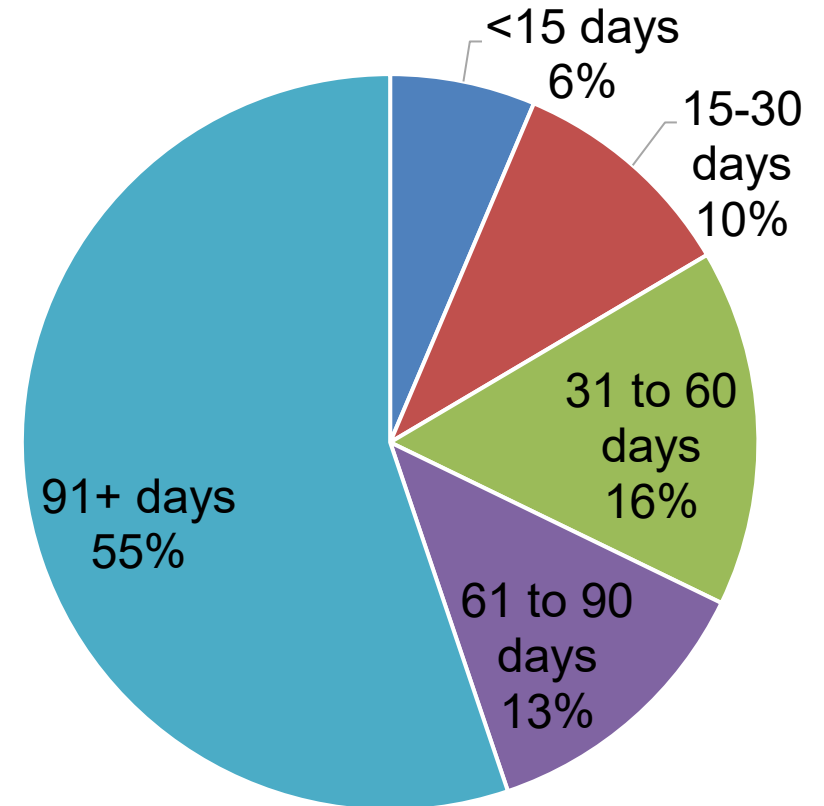
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# Lead Time: Korea

## Pre-Pandemic



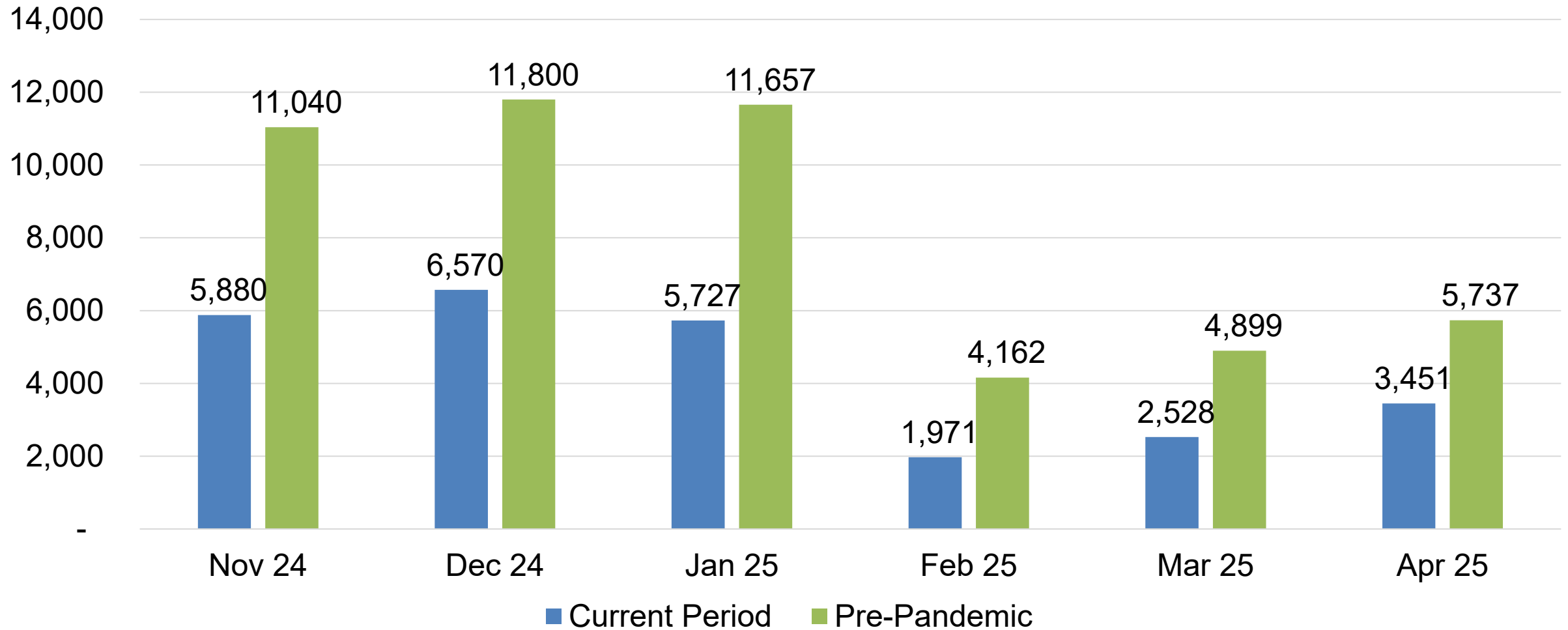
## Current Period



Source: ARC/ForwardKeys Destination Gateway

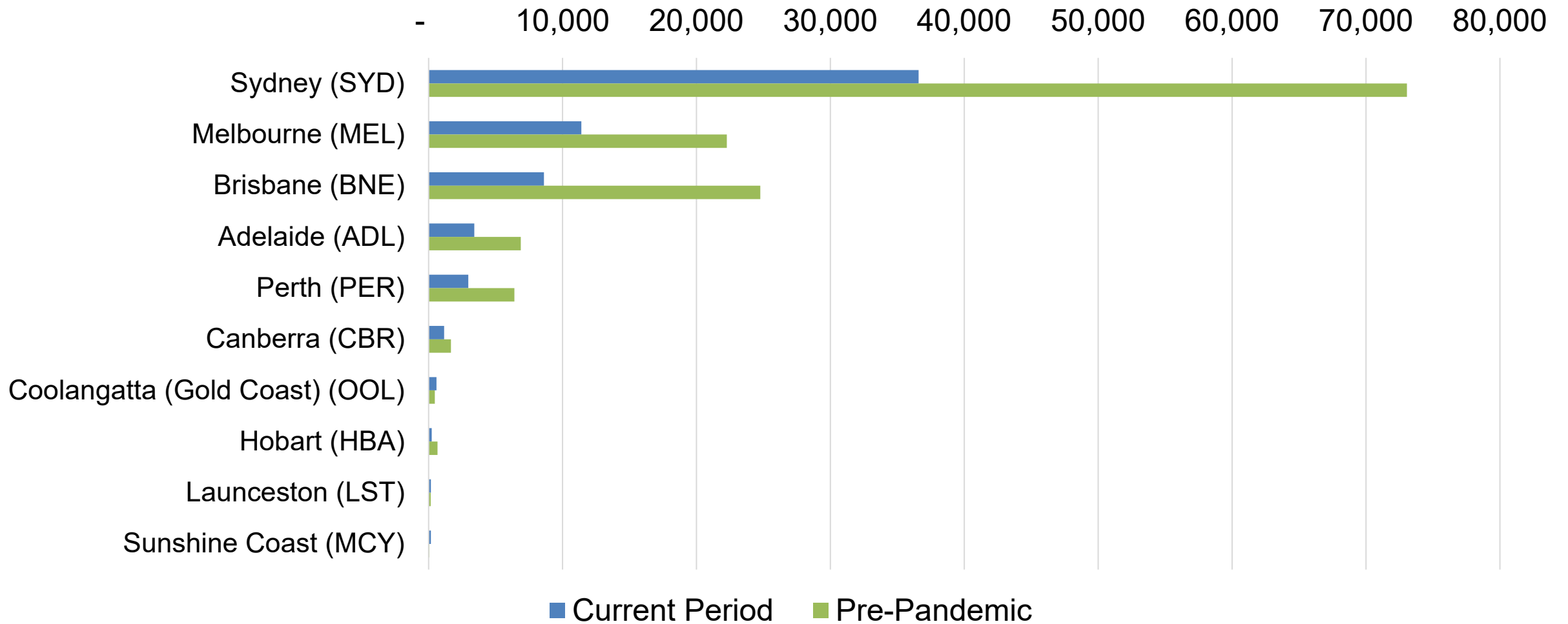


# Six Month Outlook: Australia



Source: ARC/ForwardKeys Destination Gateway

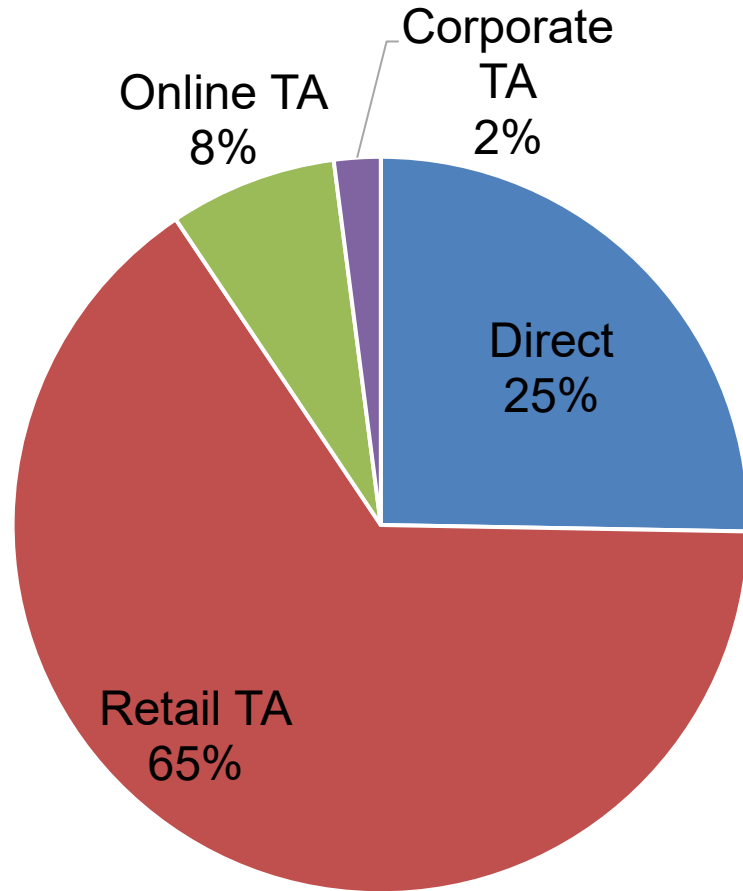
# Trip Origins: Australia



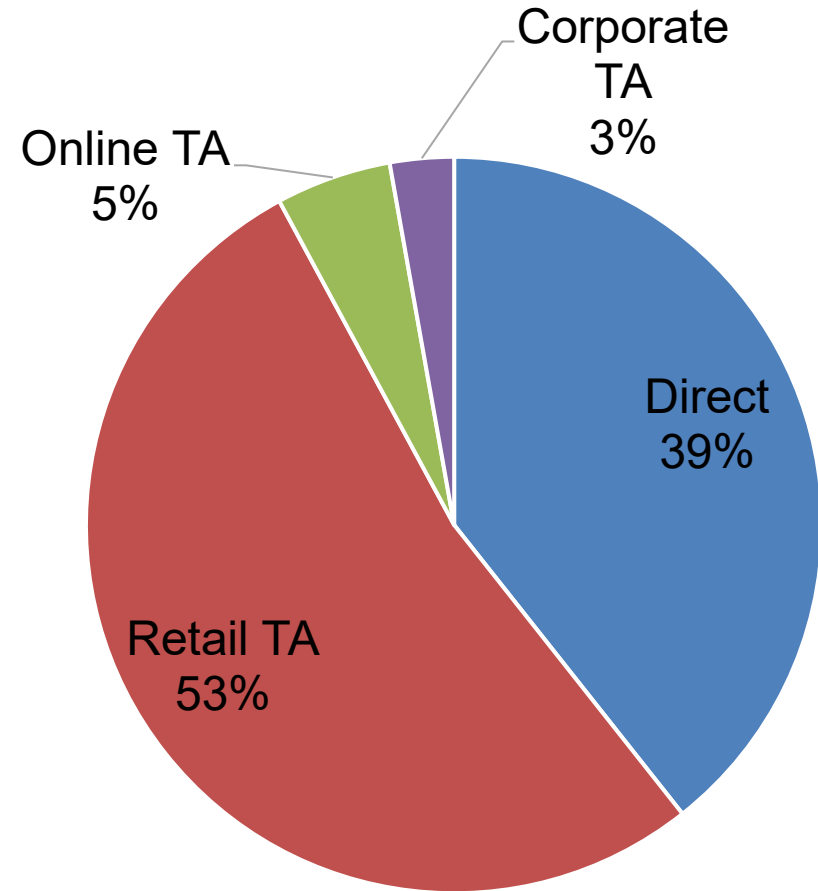
Source: ARC/ForwardKeys Destination Gateway

# Distribution Channel: Australia

## Pre-Pandemic



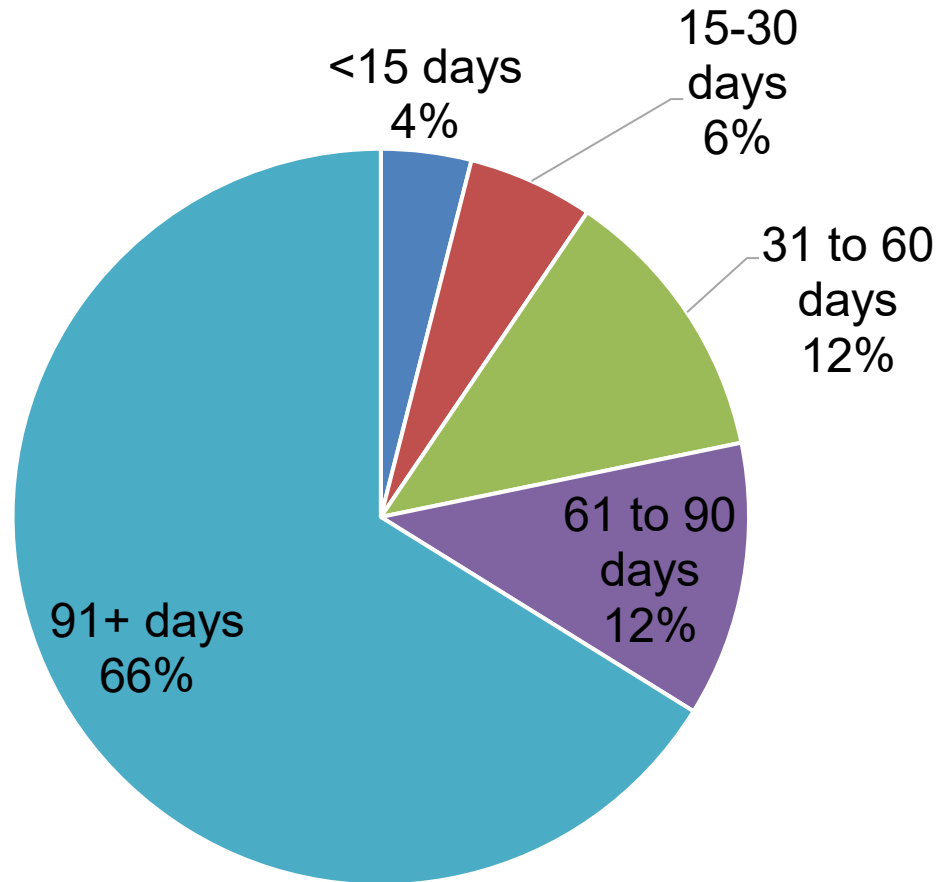
## Current Period



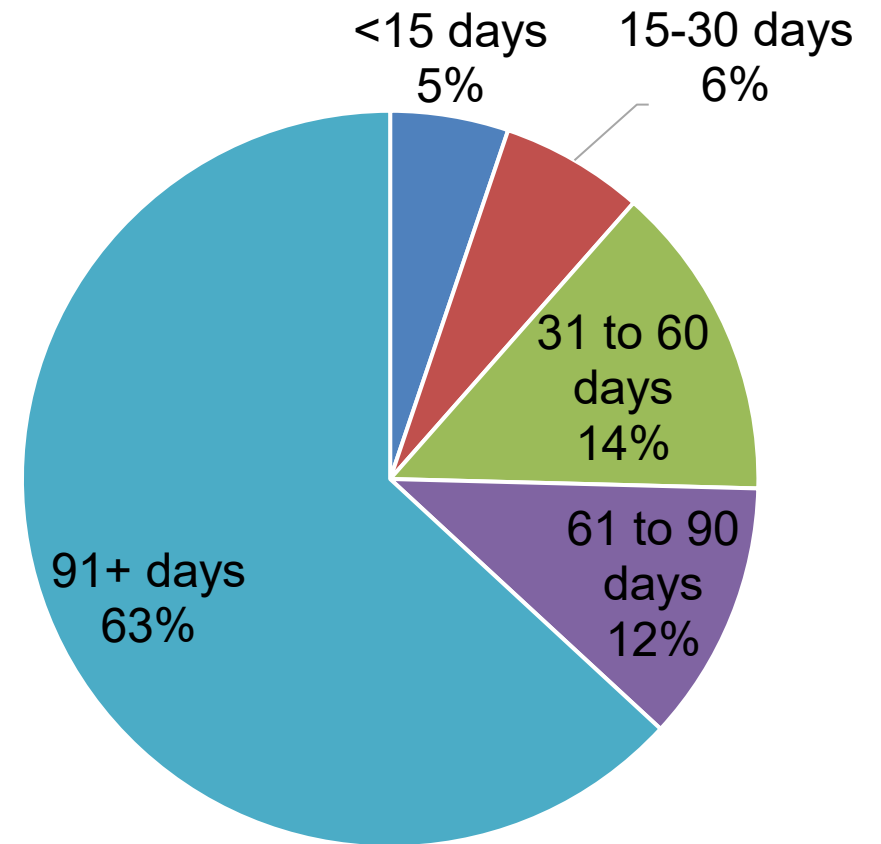
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# Lead Time: Australia

## Pre-Pandemic

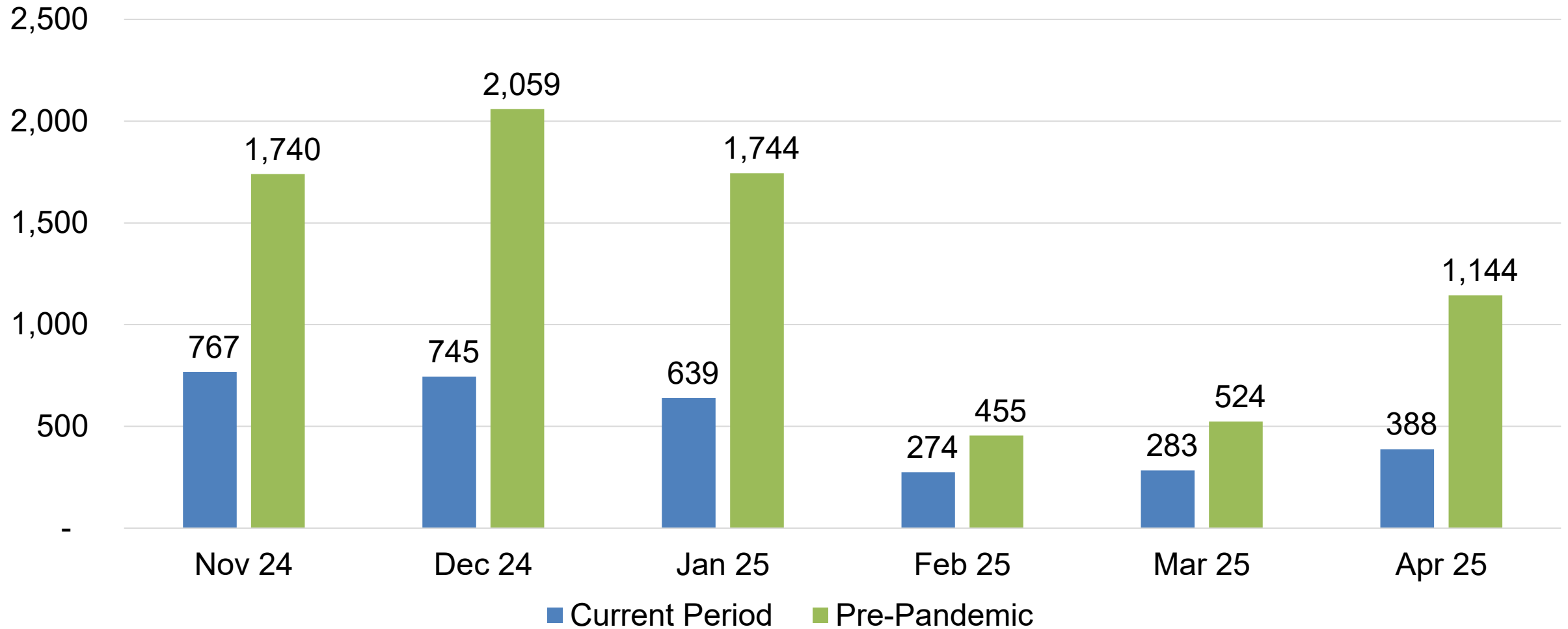


## Current Period



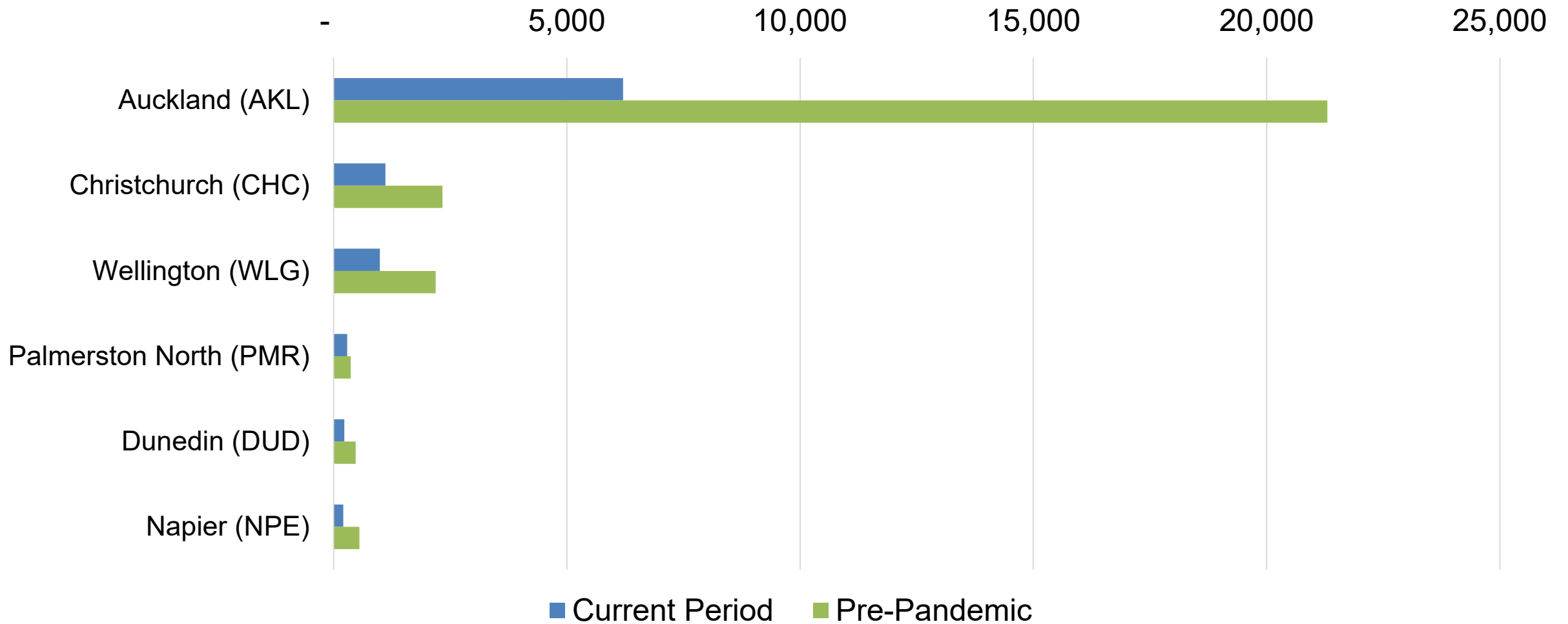
Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: New Zealand



Source: ARC/ForwardKeys Destination Gateway

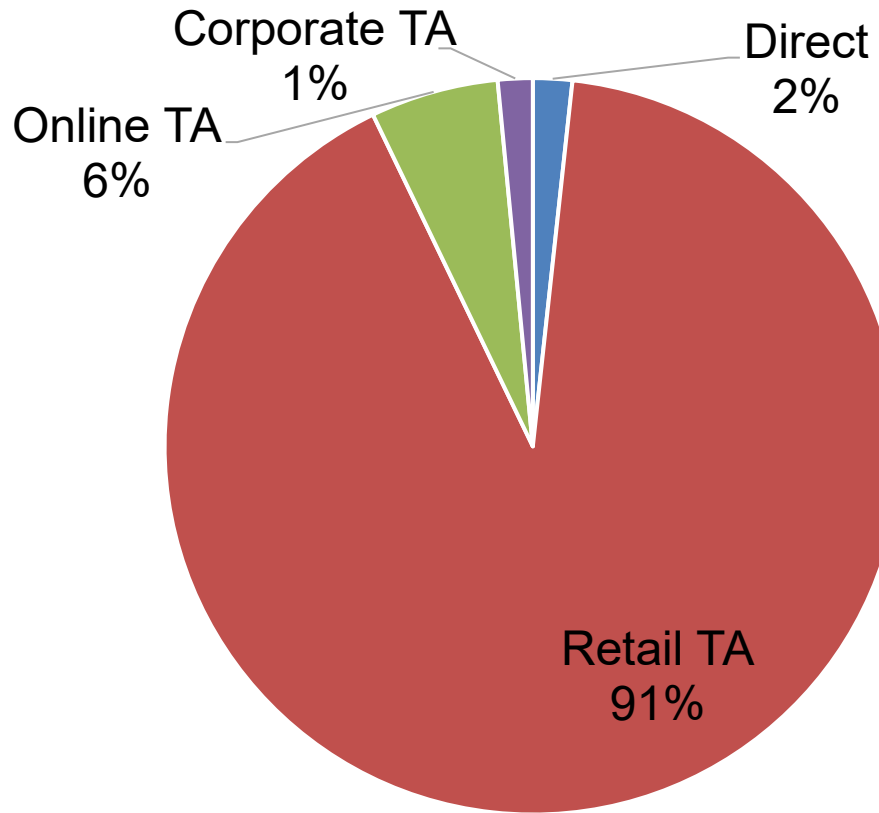
# Trip Origins: New Zealand



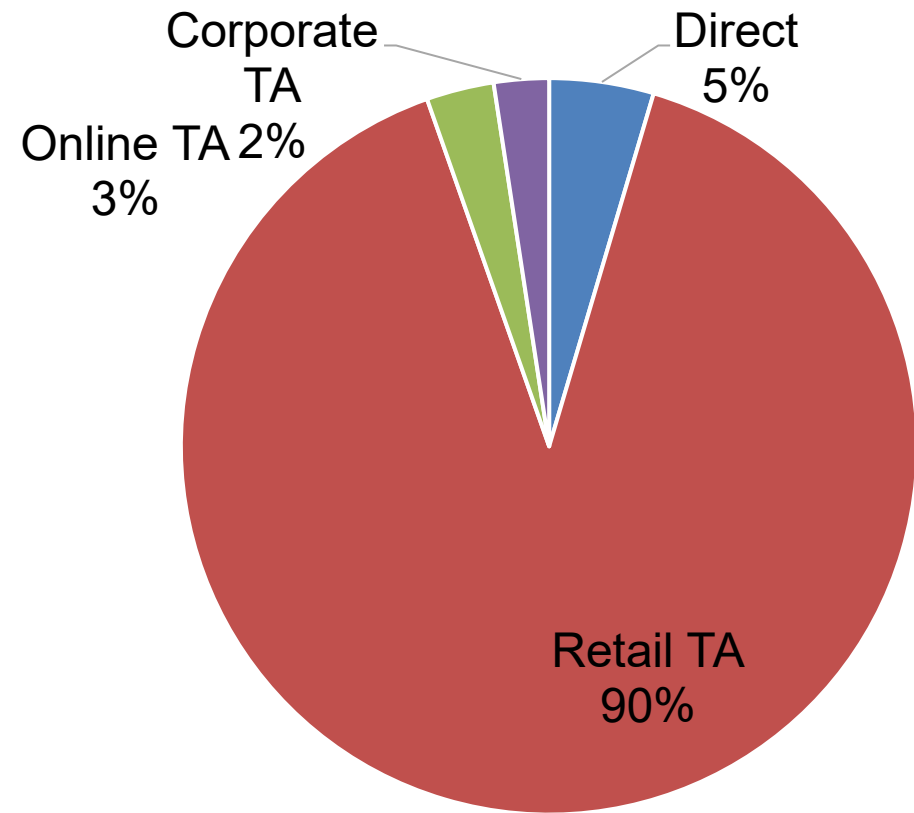
Source: ARC/ForwardKeys Destination Gateway

# Distribution Channel: New Zealand

## Pre-Pandemic



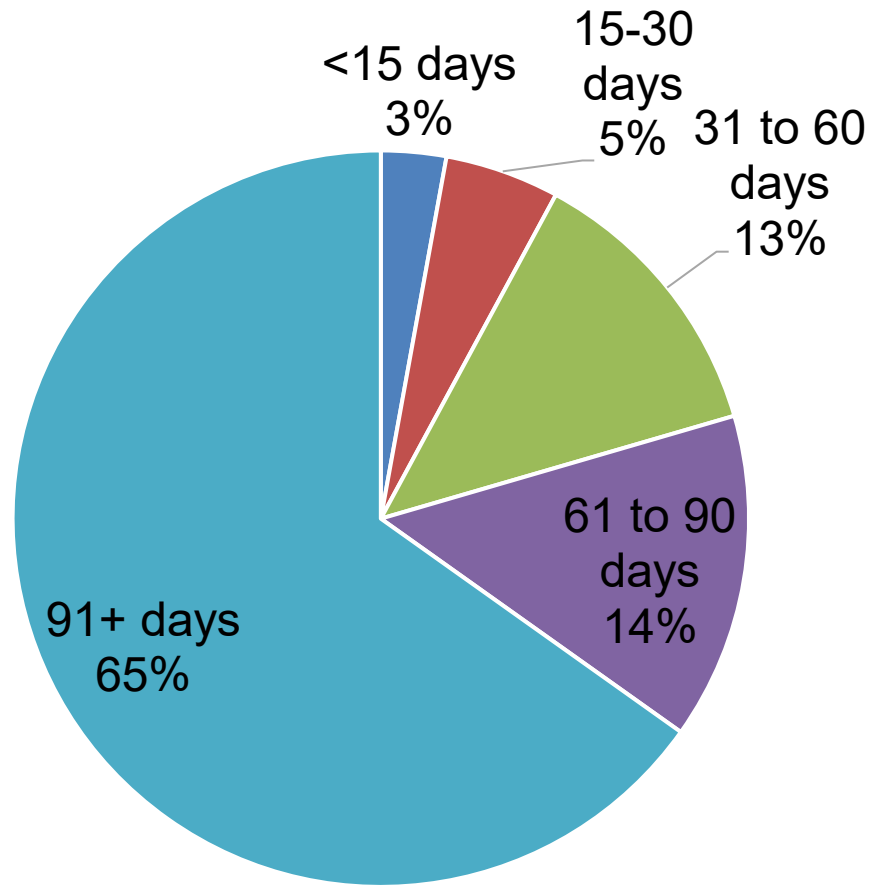
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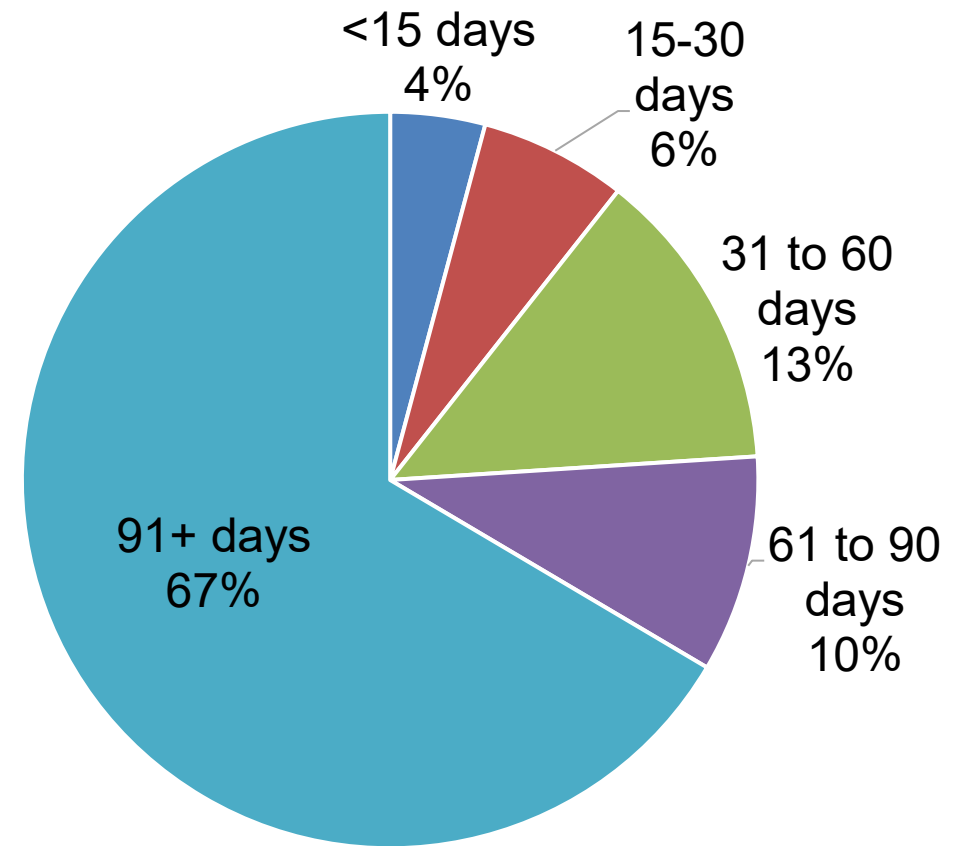
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# Lead Time: New Zealand

## Pre-Pandemic



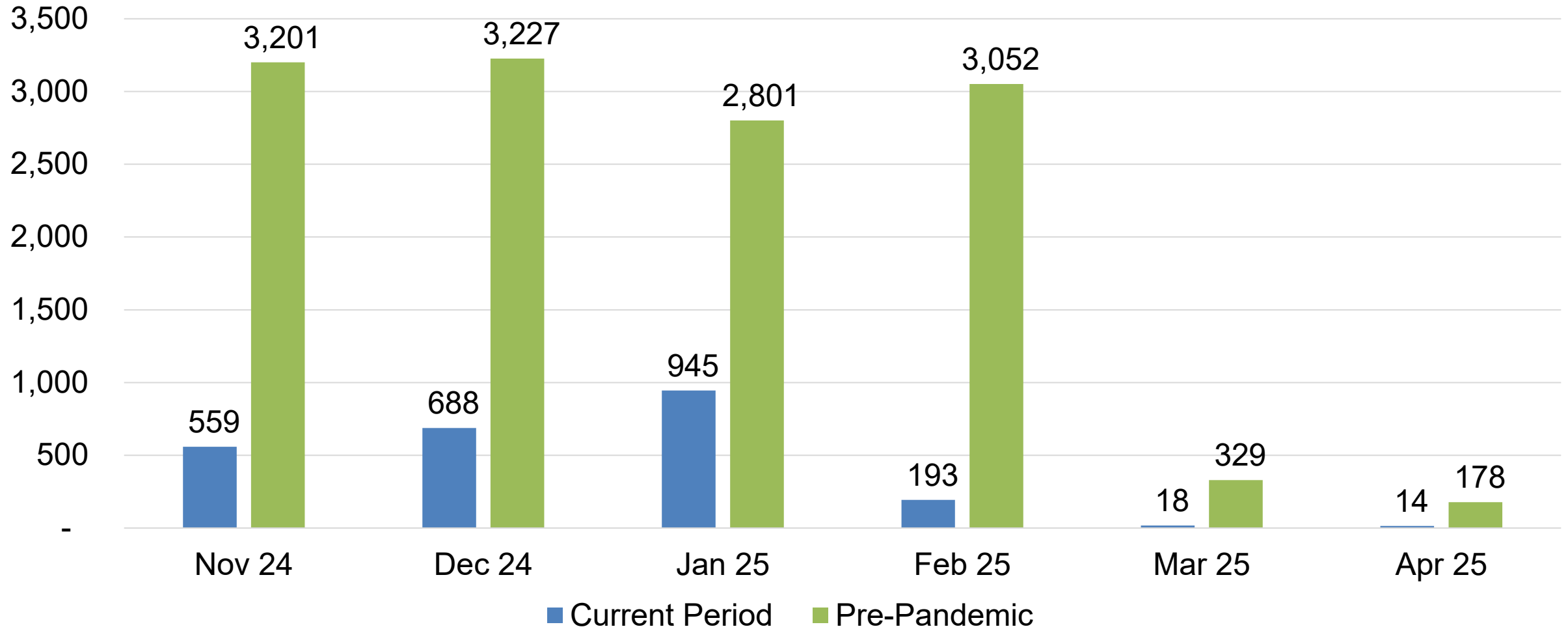
## Current Period



Source: ARC/ForwardKeys Destination Gateway

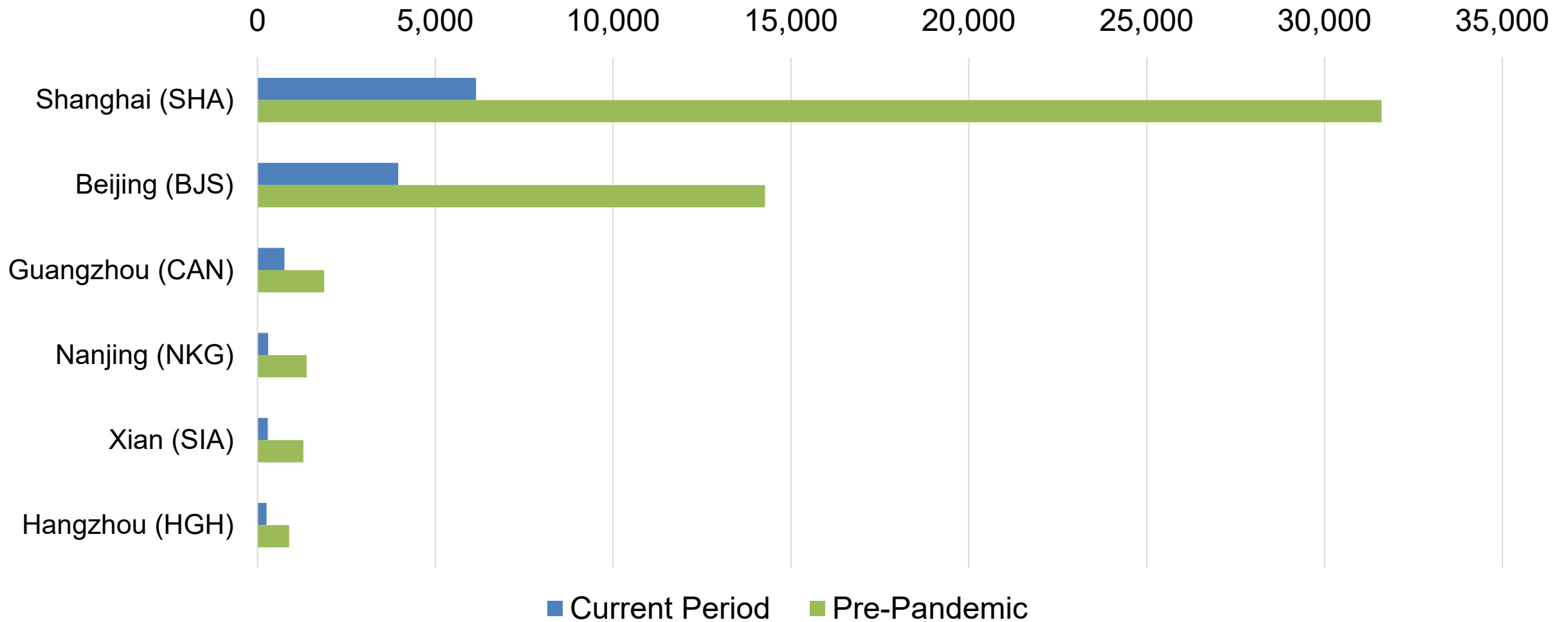


# Six Month Outlook: China



Source: ARC/ForwardKeys Destination Gateway

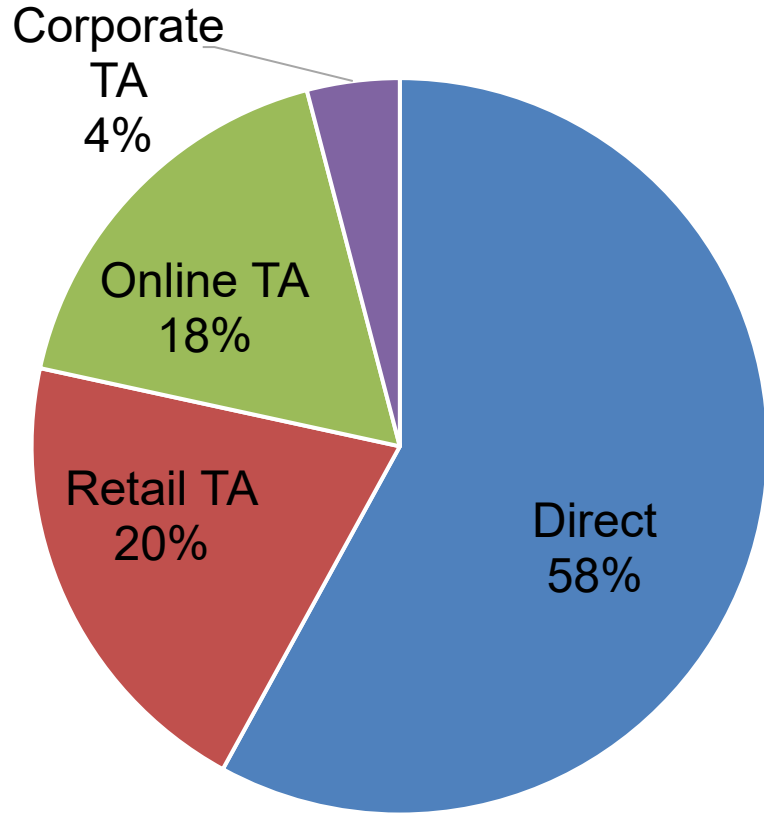
# Trip Origins: China



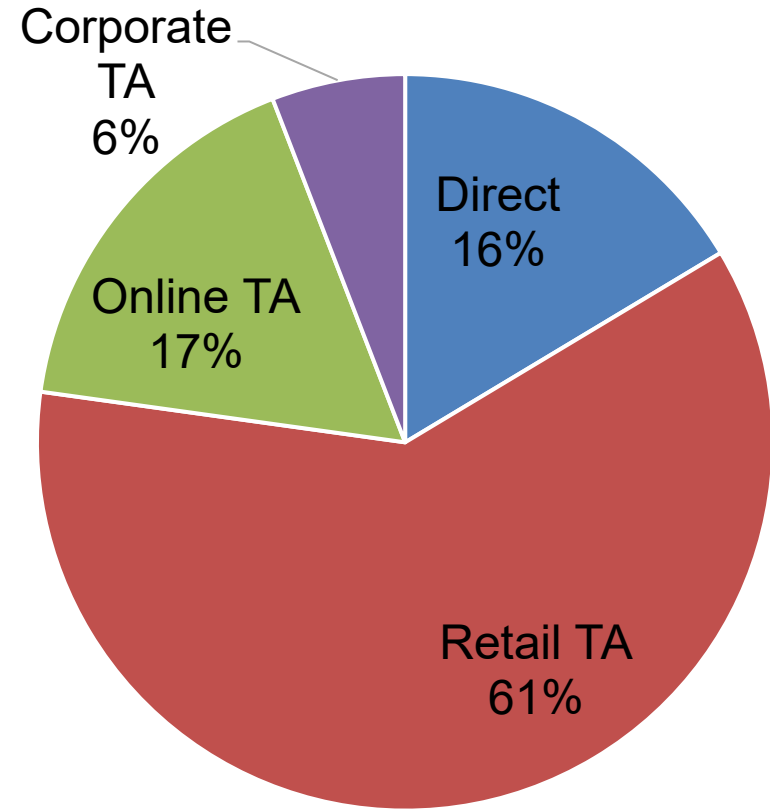
Source: ARC/ForwardKeys Destination Gateway

# Distribution Channel: China

## Pre-Pandemic



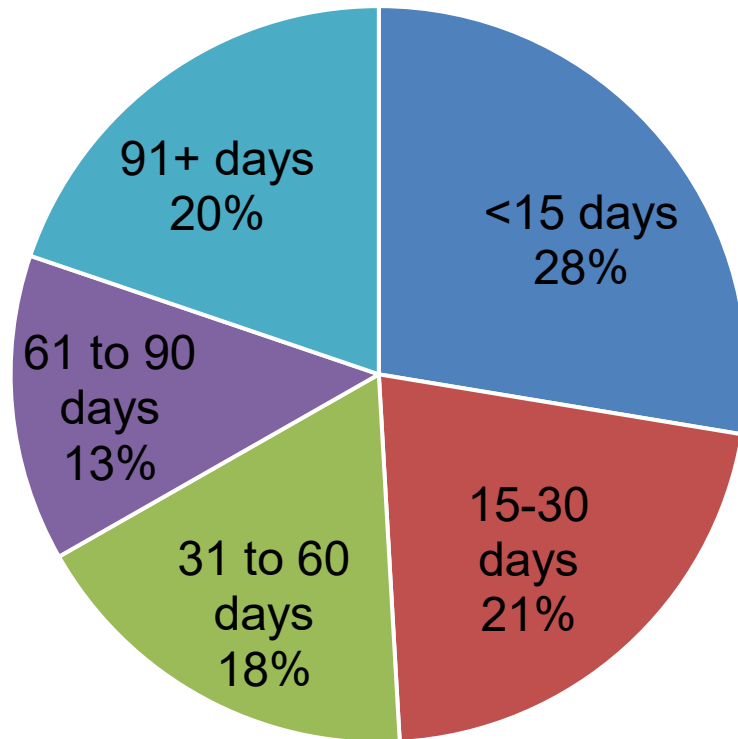
## Current Period



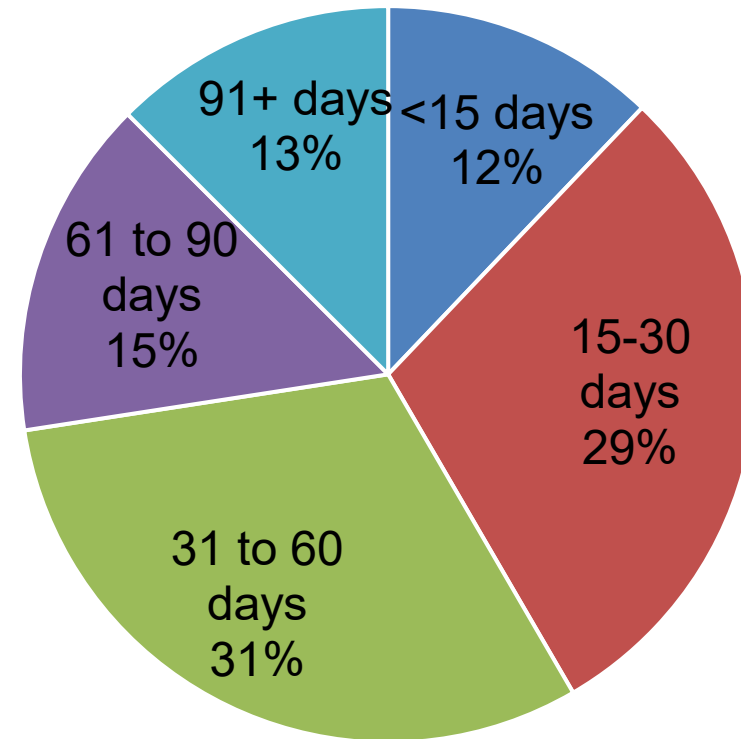
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# Lead Time: China

## Pre-Pandemic

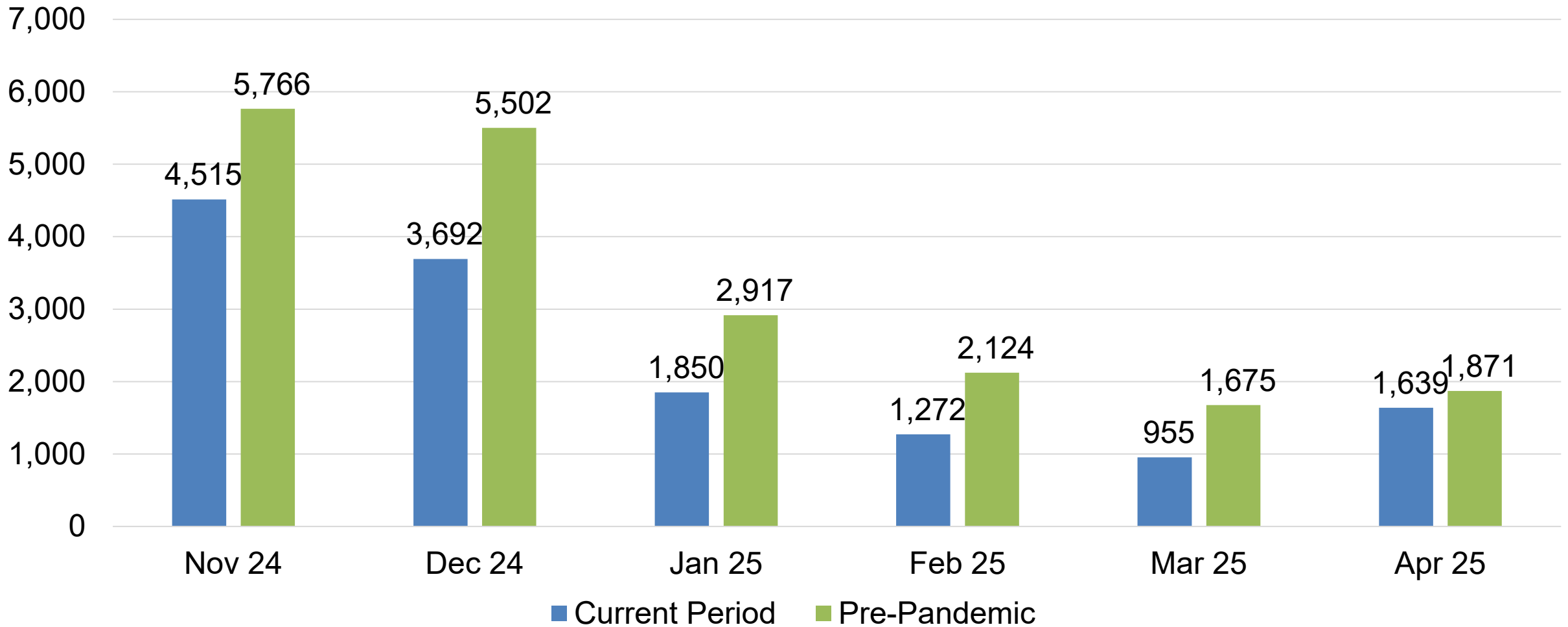


## Current Period



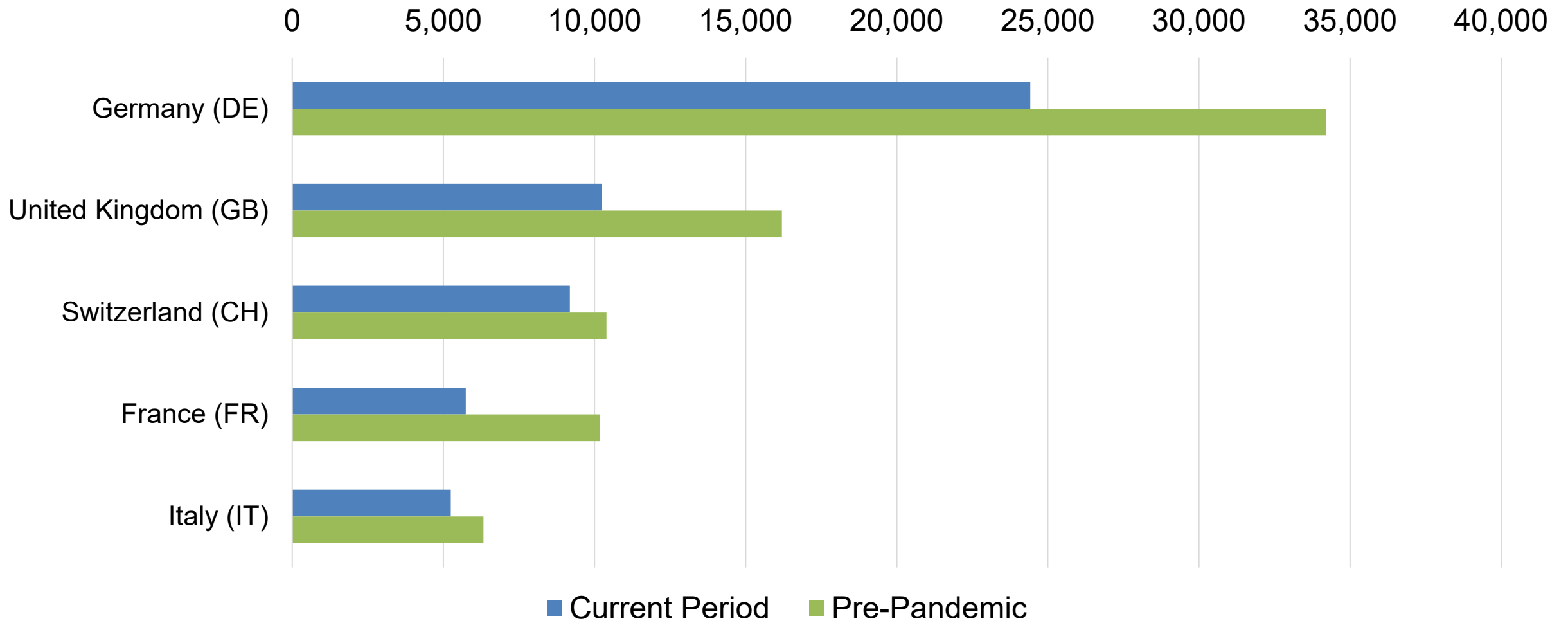
Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: Europe



Source: ARC/ForwardKeys Destination Gateway

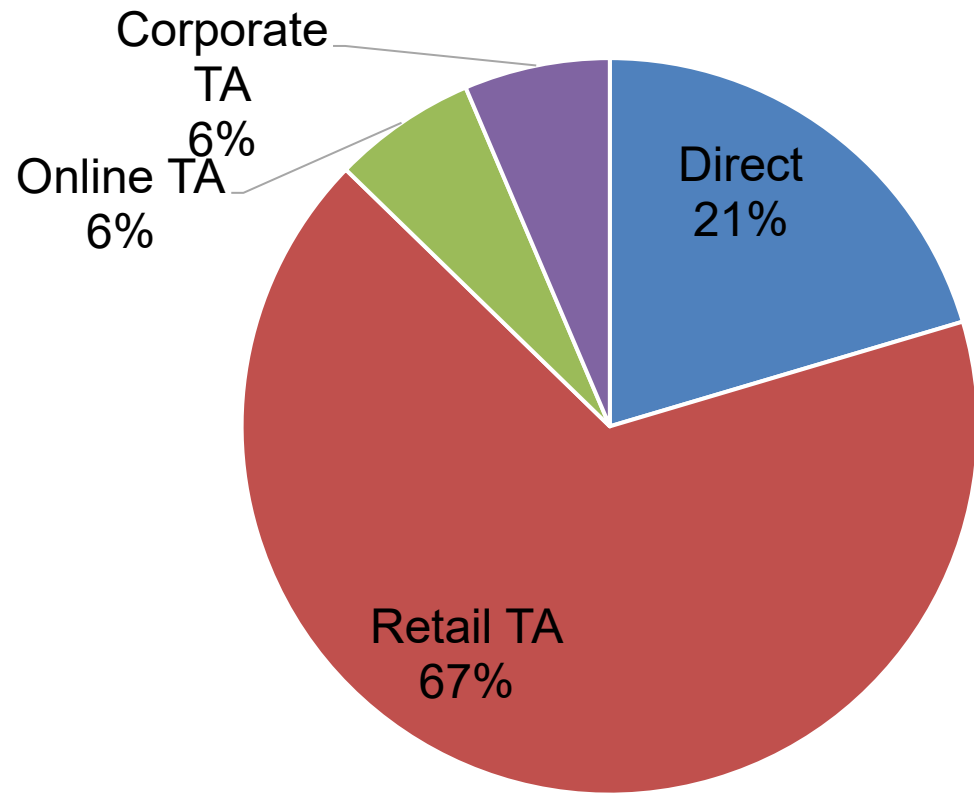
# Trip Origins: Europe



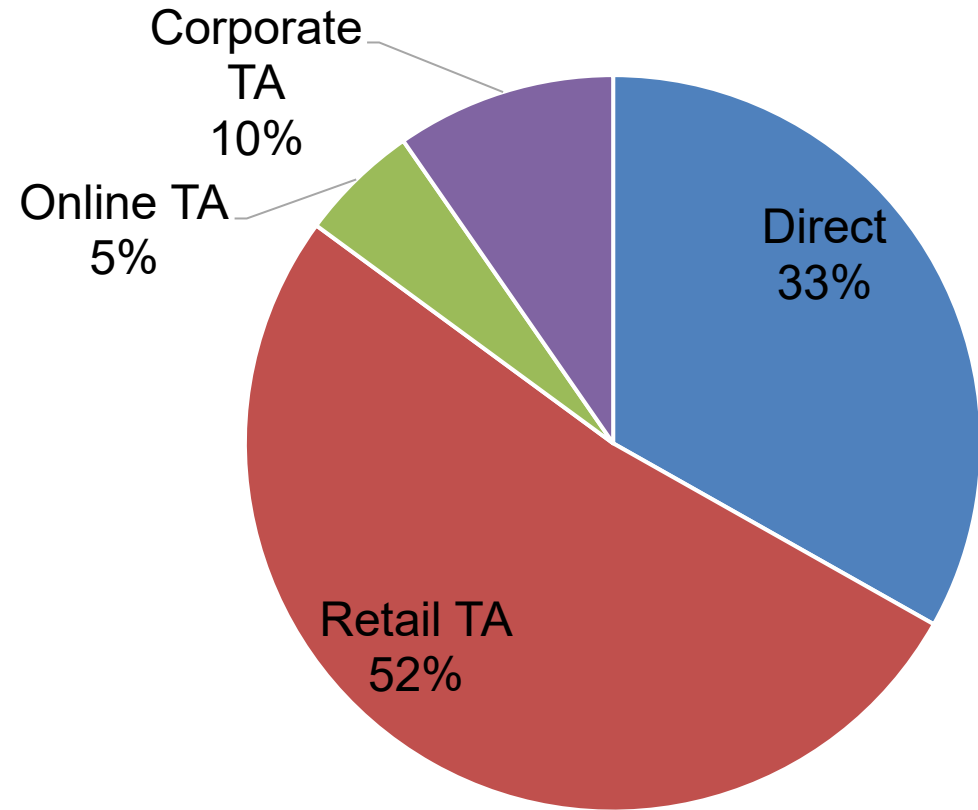
Source: ARC/ForwardKeys Destination Gateway

# Distribution Channel: Europe

## Pre-Pandemic



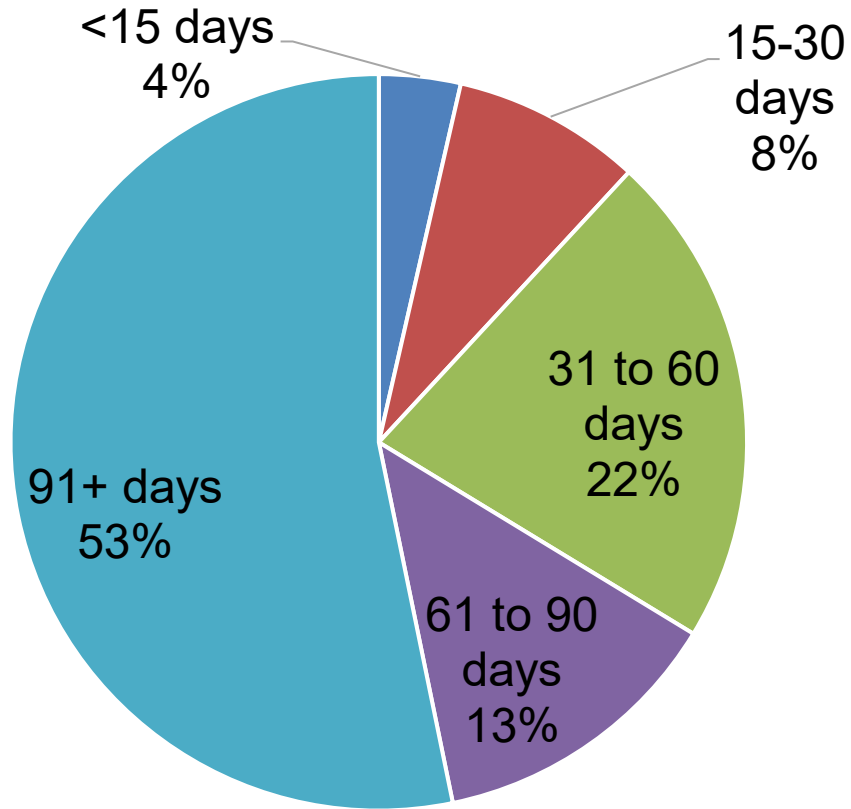
## Current Period



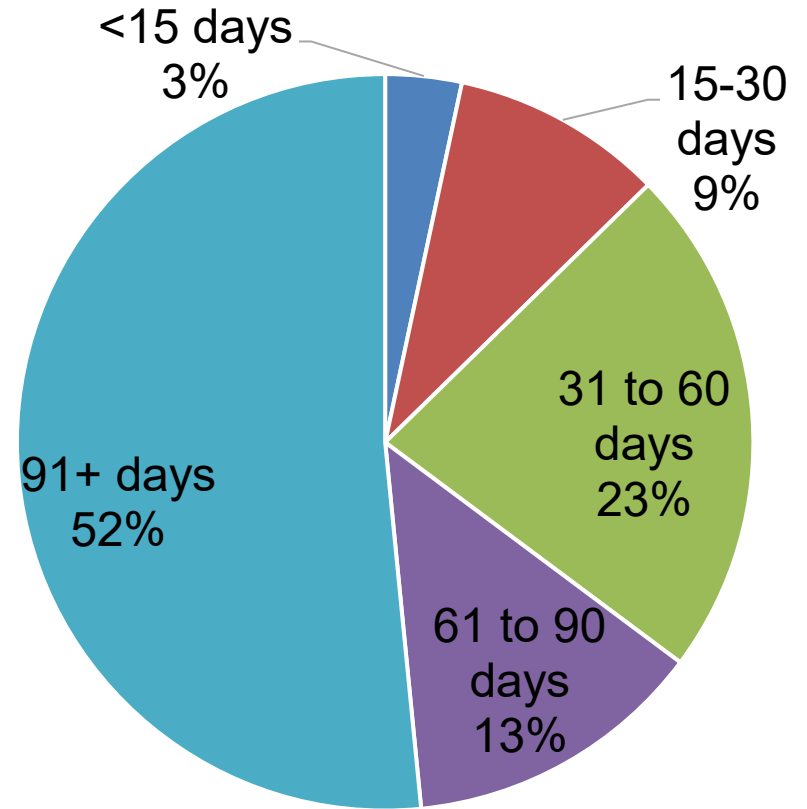
Source: ARC/ForwardKeys Destination Gateway

# Lead Time: Europe

## Pre-Pandemic



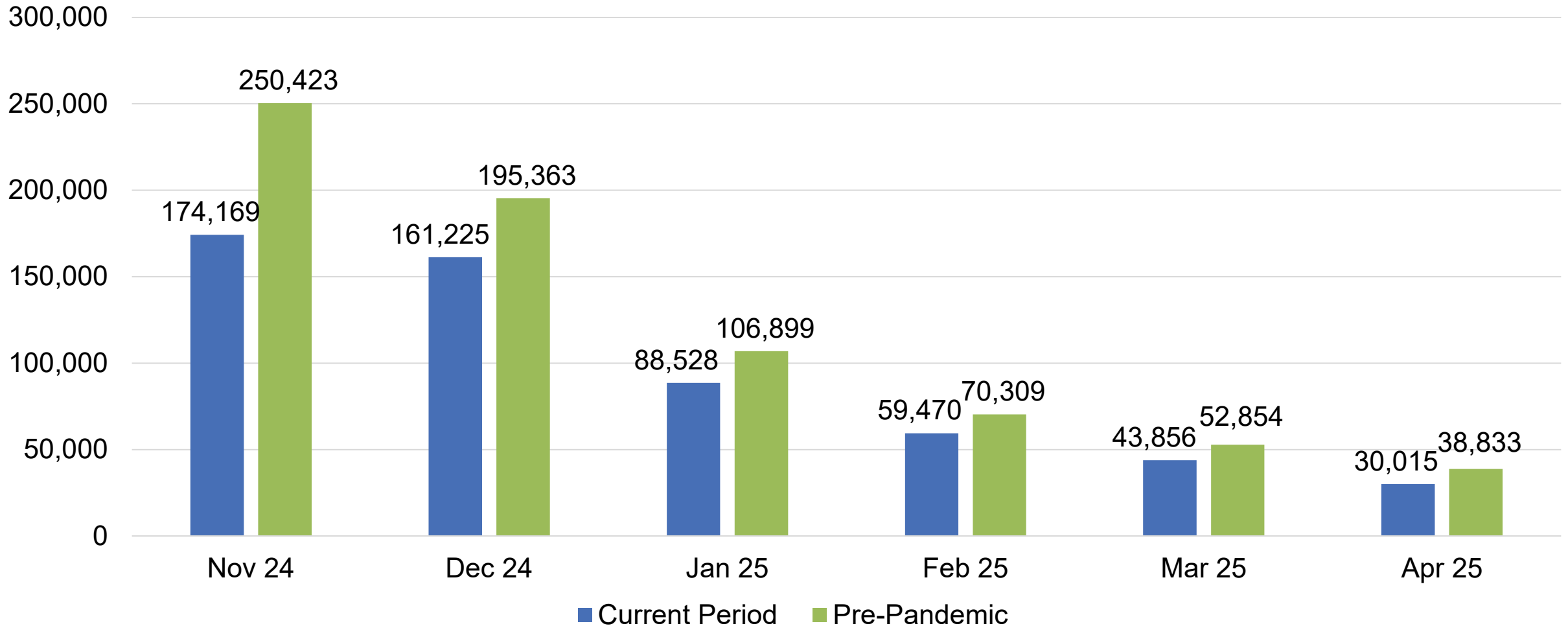
## Current Period



Source: ARC/ForwardKeys Destination Gateway

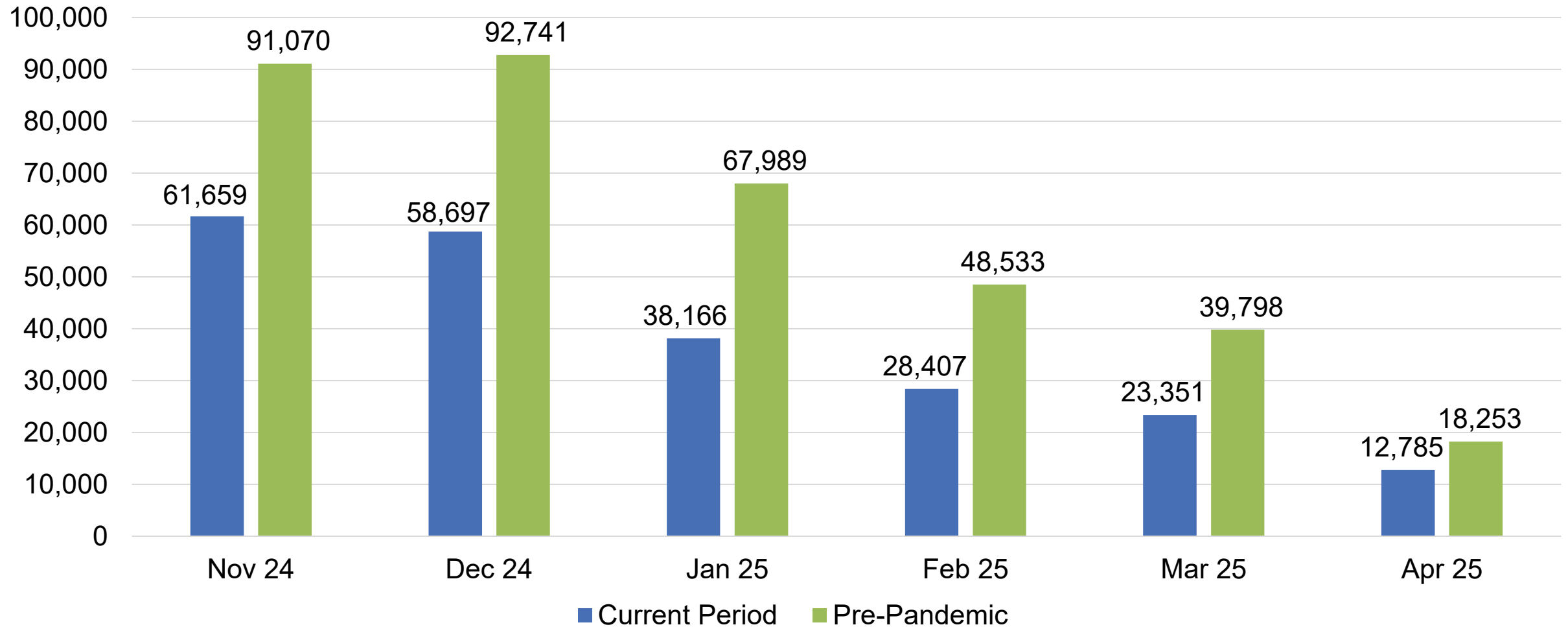


# Six Month Outlook: All Markets to O'ahu



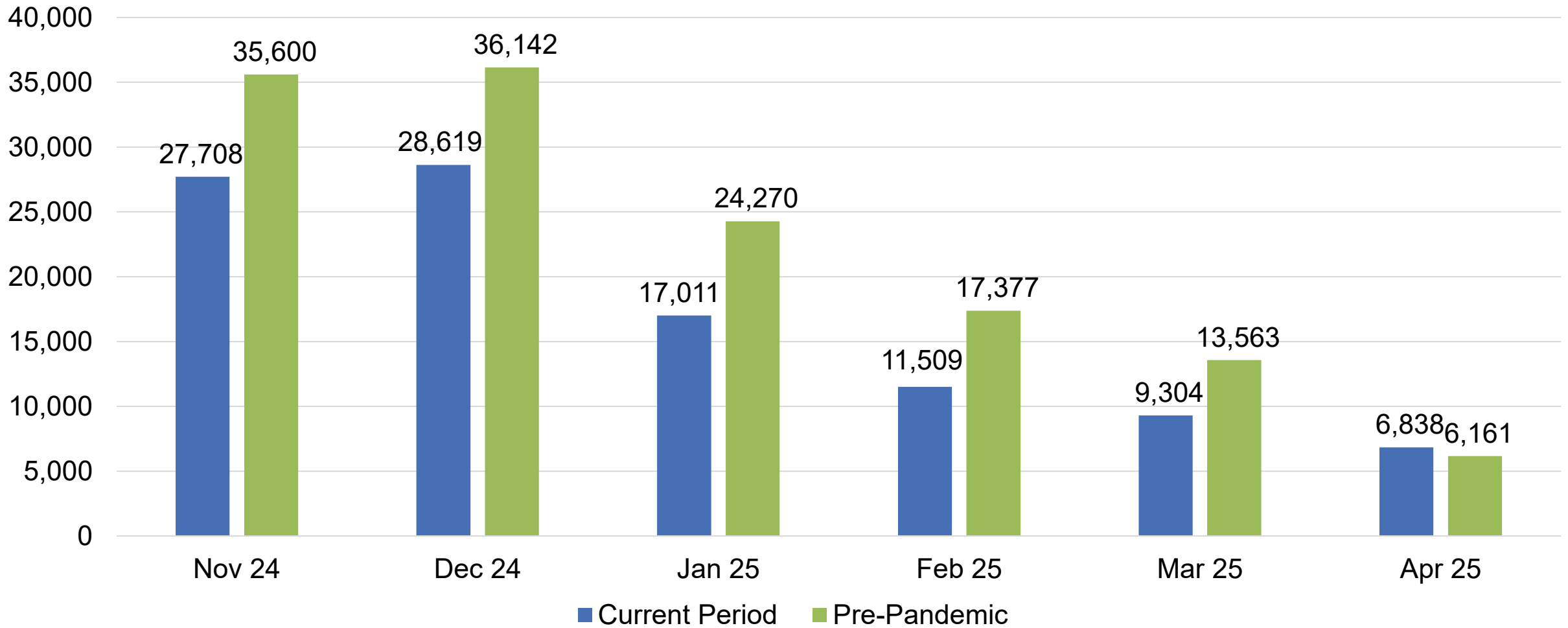
Source: ARC/ForwardKeys Destination Gateway

# Six Month Outlook: All Markets to Maui



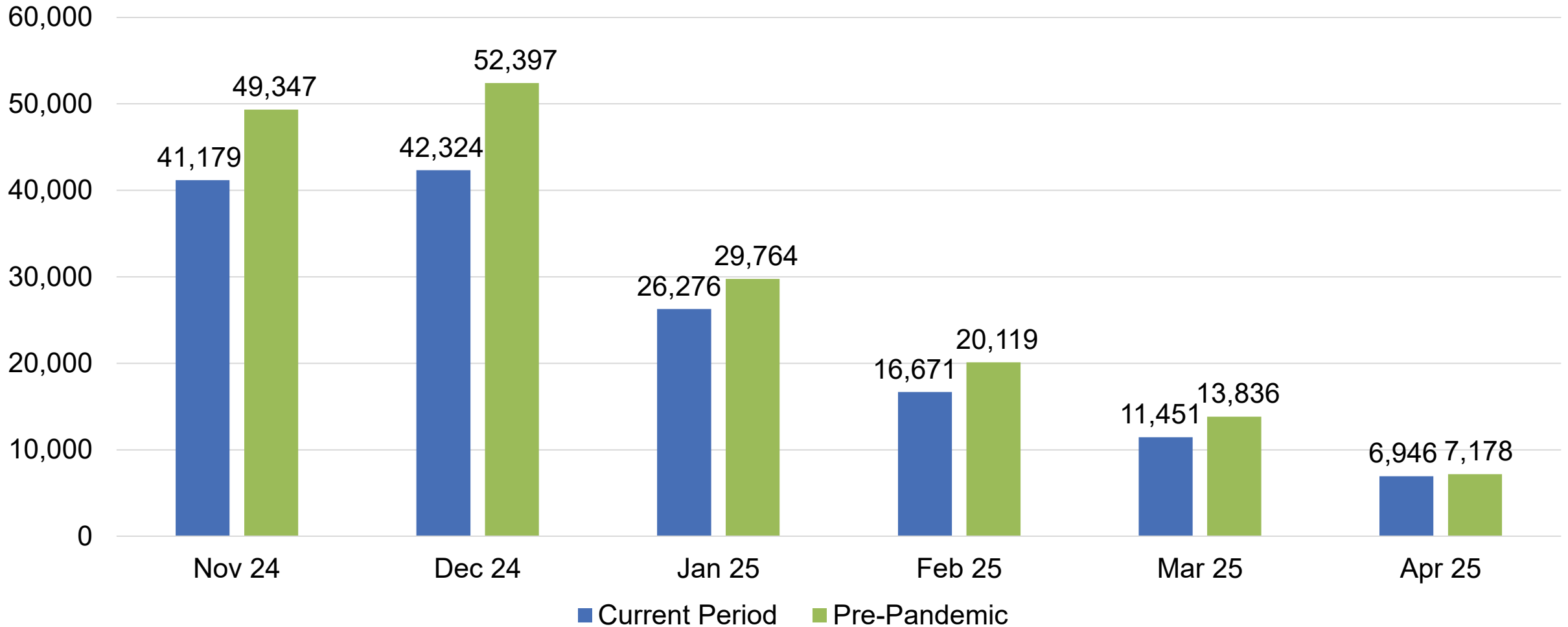
Source: ARC/ForwardKeys Destination Gateway

# 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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ECONOMIC DEVELOPMENT & TOURISM



AUTHORITY



**10**  
**Market Insights**  
**September 2024**

# Market Insights – September 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 nine months of 2024, Hawai'i's tourism economy experienced:

- Total visitor spending: \$15.50 billion, down from \$15.77 billion (-1.7%) in the first nine months of 2023, but higher than \$13.30 billion (+16.6%) in the first nine months of pre-pandemic 2019.
- Visitor arrivals: 7,233,501 visitors compared to 7,328,239 visitors (-1.3%) in the first nine months of 2023 and 7,828,965 visitors (-7.6%) in the first nine months of 2019.
- Statewide average daily census<sup>2</sup>: 230,352 total visitors, compared to 240,624 visitors (-4.3%) in first nine months of 2023 and 249,623 visitors (-7.7%) in first nine months of 2019.
- Air service: 44,946 transpacific flights with 9,984,755 seats, compared to 45,289 flights (-0.8%) with 9,929,967 seats (+0.6%) in the first nine months of 2023 and 46,412 flights (-3.2%) with 10,230,151 seats (-2.4%) in the first nine months of 2019.
- For FY2025 (July 2024 - September 2024), the state collected \$214.3 million in TAT, compared \$221.5 million (-3.3%) collected in FY 2024 (July 2023 – September 2023), and \$177.2 million (+20.9%) collected in FY 2020 (July 2019 – September 2019) (Preliminary data from Dept of Taxation).

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

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	📉 -1.7%	15,771.4	15,504.7	20,593.7
Daily Spend (\$PPPD)	📈 2.3%	240.1	245.7	244.0
Visitor Days	📉 -3.9%	65,690,341	63,116,487	84,392,803
Arrivals	📉 -1.3%	7,328,239	7,233,501	9,564,557
Daily Census	📉 -4.3%	240,624	230,352	230,581
Airlift (scheduled seats) <sup>^</sup>	📈 0.6%	9,897,982	9,952,664	13,251,219

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

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

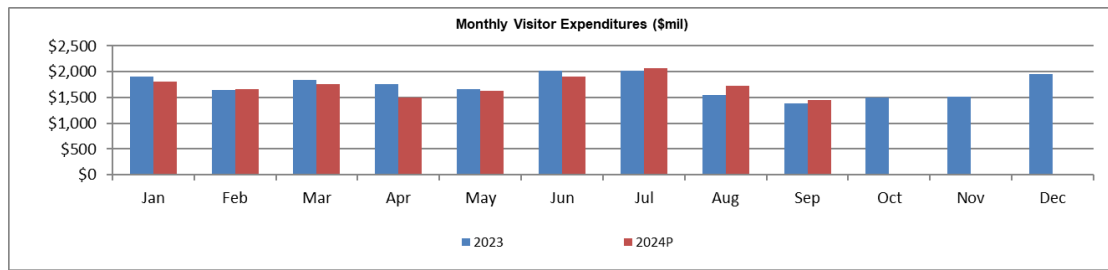
	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	📈 16.6%	13,302.1	15,504.7	20,593.7
Daily Spend (\$PPPD)	📈 25.8%	195.2	245.7	244.0
Visitor Days	📉 -7.4%	68,147,048	63,116,487	84,392,803
Arrivals	📉 -7.6%	7,828,965	7,233,501	9,564,557
Daily Census	📉 -7.7%	249,623	230,352	230,581
Airlift (scheduled seats) <sup>^</sup>	📉 -2.0%	10,160,180	9,952,664	13,251,219

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

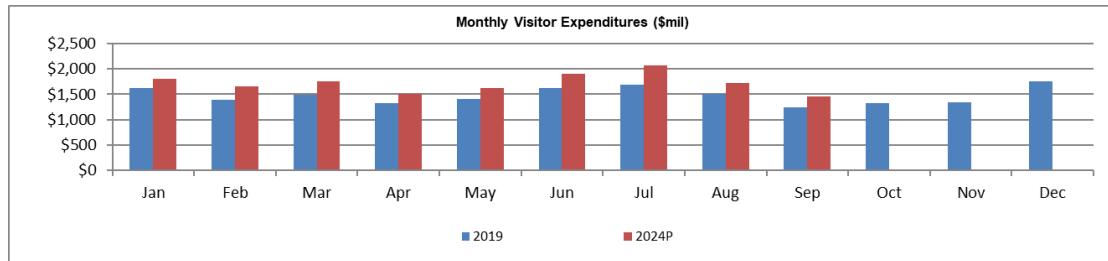
<sup>1</sup> 2024P visitor data are preliminary. 2023 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

<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 Sep. 2024P vs. Year-to-Date Sep. 2023**



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



## Major Market Areas (MMAs)

### USA

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

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	📉 -2.1%	12,191.5	11,934.0	15,794.7
Daily Spend (\$PPPD)	📈 2.8%	239.0	245.7	244.2
Visitor Days	📉 -4.8%	51,004,451	48,570,600	64,673,205
Arrivals	📉 -3.6%	5,732,363	5,523,201	7,268,850
Daily Census	📉 -5.1%	186,829	177,265	176,703
Airlift (scheduled seats) <sup>^</sup>	📉 -2.5%	8,162,127	7,954,498	10,572,881

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

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

	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	📈 36.5%	8,739.8	11,934.0	15,794.7
Daily Spend (\$PPPD)	📈 31.3%	187.1	245.7	244.2
Visitor Days	📈 4.0%	46,717,448	48,570,600	64,673,205
Arrivals	📈 6.0%	5,210,250	5,523,201	7,268,850
Daily Census	📈 3.6%	171,126	177,265	176,703
Airlift (scheduled seats) <sup>^</sup>	📈 8.6%	7,323,256	7,954,498	10,572,881

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

- The US. economy remains positive. Consumer spending is stronger than expected and is forecasted to rise 2.4 percent in 2024, slightly more than the 2.2 percent increase recorded last year.
- The Conference Board Consumer Confidence Index fell in September 2024 to 98.7 (1985=100), from 105.6 in August 2024. The Present Situation Index—based on consumers’ assessment of current business and labor market conditions—fell by 10.3 points to 124.3. The Expectations Index—based on consumers’ short-term outlook for income, business, and labor market conditions—declined by 4.6 points to 81.7, but remained above 80. (A reading below the threshold of 80 usually signals a recession ahead.)



- According to Future Partners, American travelers close out a monster 2024 Summer travel season with a healthy financial outlook, record anticipated travel budgets, trips planned for Fall, a strong attraction to international destinations, a keen eye on destination safety, and longer trip-planning windows. The financial outlook among American travelers has held steady year-to-date, with the share of those who said that their household is better off compared to a year ago at 31.8 percent this month (down just 1.1 points from last month). Trip planning windows have lengthened in 2024 relative to 2023, when they were at a three-year low. Interestingly for travel marketers, nearly one-third said they always (8.5%) or often (23.7%) adjust their travel dates or destinations to take advantage of better deals or lower costs.
- HTA Airline Seat Capacity Outlook for October-December 2024 was updated on Oct. 3. The forecast for domestic scheduled nonstop air seats to Hawai'i during this period will be up 4.7 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 (+4.1%) with a small decrease from the U.S. East (-9.3%). The growth in the East is due to the new Delta HNL-BOS flight starting in November

## US WEST

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

		YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	👇	-0.6%	7,308.5	7,262.1	9,606.9
Daily Spend (\$PPPD)	👆	3.6%	225.1	233.2	232.1
Visitor Days	👇	-4.1%	32,463,933	31,134,868	41,385,615
Arrivals	👇	-2.9%	3,832,439	3,720,251	4,880,379
Daily Census	👇	-4.4%	118,916	113,631	113,075
Airlift (scheduled seats)^	👇	-2.1%	7,217,148	7,065,838	9,377,384

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

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

		YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	👆	41.0%	5,151.9	7,262.1	9,606.9
Daily Spend (\$PPPD)	👆	34.4%	173.5	233.2	232.1
Visitor Days	👆	4.9%	29,691,370	31,134,868	41,385,615
Arrivals	👆	7.9%	3,447,548	3,720,251	4,880,379
Daily Census	👆	4.5%	108,760	113,631	113,075
Airlift (scheduled seats)^	👆	10.2%	6,413,400	7,065,838	9,377,384

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

- In the first nine months of 2024, there were 3,720,251 visitors from the U.S. West, compared to 3,832,439 visitors (-2.9%) in the first nine months of 2023 and 3,447,548 visitors (+7.9%) in the first nine months of pre-pandemic 2019. U.S. West visitors spent \$7.26 billion in the first nine months of 2024, compared to \$7.31 billion (-0.6%) in the first nine months of 2023 and \$5.15 billion (+41.0%) in the first nine months of 2019.
- In the first nine months of 2024, 33,981 scheduled flights with 7,065,838 seats serviced Hawai'i from U.S. West. In the first nine months of 2023, there were 34,946 scheduled flights (-2.8%) with 7,217,148 seats (-2.1%). In the first nine months of 2019 there were 31,974 scheduled flights (+6.3%) with 6,413,400 seats (+10.2%).

## US EAST

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

		YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	👉	-4.3%	4,883.0	4,671.9	6,187.8
Daily Spend (\$PPPD)	👉	1.7%	263.4	267.9	265.7
Visitor Days	👉	-6.0%	18,540,517	17,435,732	23,287,590
Arrivals	👉	-5.1%	1,899,924	1,802,950	2,388,471
Daily Census	👉	-6.3%	67,914	63,634	63,627
Airlift (scheduled seats)^	👉	-6.0%	944,979	888,660	1,195,497

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

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

		YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	👆	30.2%	3,587.9	4,671.9	6,187.8
Daily Spend (\$PPPD)	👆	27.2%	210.7	267.9	265.7
Visitor Days	👉	2.4%	17,026,078	17,435,732	23,287,590
Arrivals	👉	2.3%	1,762,702	1,802,950	2,388,471
Daily Census	👉	2.0%	62,367	63,634	63,627
Airlift (scheduled seats)^	👉	-2.3%	909,856	888,660	1,195,497

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

- In the first nine months of 2024, 1,802,950 visitors arrived from the U.S. East, compared to 1,899,924 visitors (-5.1%) in the first nine months of 2023 and 1,762,702 visitors (+2.3%) in the first nine months of 2019. U.S. East visitors spent \$4.67 billion in the first nine months of 2024, compared to \$4.88 billion (-4.3%) in the first nine months of 2023 and \$3.59 billion (+30.2%) in the first nine months of 2019.
- In the first nine months of 2024, 3,333 scheduled flights with 888,660 seats serviced Hawai'i from U.S. East. In the first nine months of 2023, there were 3,434 scheduled flights (-2.9%) with 944,979 seats (-6.0%). In the first nine months of 2019 there were 3,179 scheduled flights (+4.8%) with 909,856 seats (-2.3%).

## JAPAN

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

		YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	👆	22.6%	632.0	774.6	1,070.5
Daily Spend (\$PPPD)	👉	0.0%	238.1	238.1	241.9
Visitor Days	👆	22.6%	2,654,633	3,253,593	4,424,958
Arrivals	👆	31.6%	396,802	522,021	717,173
Daily Census	👆	22.1%	9,724	11,874	12,090
Airlift (scheduled seats)^	👆	41.6%	740,118	1,047,728	1,384,543

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

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

		YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	👇	-53.1%	1,652.4	774.6	1,070.5
Daily Spend (\$PPPD)	👉	0.4%	237.0	238.1	241.9
Visitor Days	👇	-53.3%	6,971,475	3,253,593	4,424,958
Arrivals	👇	-55.5%	1,173,477	522,021	717,173
Daily Census	👇	-53.5%	25,537	11,874	12,090
Airlift (scheduled seats)^	👇	-30.1%	1,498,414	1,047,728	1,384,543

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

- In the first nine months of 2024, there were 522,021 visitors from Japan, compared to 396,802 visitors (+31.6%) in the first nine months of 2023 and 1,173,477 visitors (-55.5%) in the first nine months of pre-pandemic 2019. Visitors from Japan spent \$774.6 million in the first nine months of 2024, compared to \$632.0 million (+22.6%) in the first nine months of 2023 and \$1.65 billion (-53.1%) in the first nine months of 2019.
- In the first nine months of 2024, 3,584 scheduled flights with 1,047,728 seats serviced Hawai'i from Japan. In the first nine months of 2023, there were 2,691 scheduled flights (+33.2%) with 740,118 seats (+41.6%). In the first nine months of 2019 there were 5,836 scheduled flights (-38.6%) with 1,498,414 seats (-30.1%).
- The projected number of Japanese travelers departing in August 2024 is over 1.4 million, marking the highest figure for the year and representing 68 percent of the levels seen in 2019.
- In an interview with Kyodo News, Hiroyuki Takahashi, Chairman of the Japan Association of Travel Agents and JTB, expressed his intention to request the government to provide free passports to all 18-year-olds. He noted that the recovery of international travel has been sluggish due to the weak yen and elevated travel costs post-COVID-19 pandemic. He emphasized the need for this initiative to encourage the younger generation to travel abroad, highlighting that only about 17 percent of Japanese people currently hold passports. He believes that offering a five-year passport to 18-year-olds could stimulate an increase in overseas travel.
- Expedia's ranking of the most popular international travel destinations for fall 2024 places Seoul at the top, followed by Taipei and other favored Asian locations in second place. Honolulu, a consistently popular destination, ranks third. The high ranking of Asian destinations, which are easily accessible during three-day weekends, is notable, alongside four non-Asian destinations, including Honolulu, likely influenced by the recent appreciation of the yen.
- On September 20, 2024, ZIPAIR announced the suspension of its winter schedule for NRT-HNL flights starting October 27, 2024 for the entire winter season. A ZIPAIR executive cited challenges with the ground handling operation as the reason for this decision. However, they have renewed their contract effective March 15, 2025, just weeks before the winter schedule concludes, and plan to resume operations on the NRT-HNL route.

## CANADA

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

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -13.8%	865.5	745.8	1,093.6
Daily Spend (\$PPPD)	↔ 1.9%	217.8	222.0	223.7
Visitor Days	↓ -15.5%	3,972,855	3,358,907	4,887,902
Arrivals	↓ -10.3%	340,217	305,029	432,558
Daily Census	↓ -15.8%	14,553	12,259	13,355
Airlift (scheduled seats) <sup>^</sup>	↓ -10.9%	334,807	298,186	420,129

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diao Mi flight schedules as of October 22, 2024, subject to change.<sup>4</sup>

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

	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↔ -5.7%	790.6	745.8	1,093.6
Daily Spend (\$PPPD)	↑ 33.8%	165.9	222.0	223.7
Visitor Days	↓ -29.5%	4,764,961	3,358,907	4,887,902
Arrivals	↓ -22.4%	393,074	305,029	432,558
Daily Census	↓ -29.8%	17,454	12,259	13,355
Airlift (scheduled seats) <sup>^</sup>	↓ -16.4%	356,885	298,186	420,129

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diao Mi flight schedules as of October 22, 2024, subject to change.

- In the first nine months of 2024, there were 305,029 visitors from Canada, compared to 340,217 visitors (-10.3%) in the first nine months of 2023 and 393,074 visitors (-22.4%) in the first nine months of pre-pandemic 2019. Visitors from Canada spent \$745.8 million in the first nine months of 2024, compared to \$865.5 million (-13.8%) in the first nine months of 2023 and \$790.6 million (-5.7%) in the first nine months of 2019.
- In the first nine months of 2024, 1,653 scheduled flights with 298,186 seats serviced Hawai'i from Canada. In the first nine months of 2023, there were 1,843 scheduled flights (-10.3%) with 334,807 seats (-10.9%). In the first nine months of 2019 there were 1,898 scheduled flights (-12.9%) with 356,885 seats (-16.4%).
- The Bank of Canada continues to cut interest rates, as inflation is on track to reach 2 percent by the end of 2024. Economists and the Bank of Canada have indicated the further cuts are likely.
- In September 2024, the exchange rate continued to hover between \$0.73 and \$0.745.
- Nearly 11.9 million Canadians returned home from an overnight transborder trip between Jan-July 2024, a lower level of activity than last year (-2.7%) but a larger volume than recorded in 2019 (+2.3%). Trips by air reached 5.9 million during the period, a larger volume than reported in 2019 (+16.7%) but an 11.3 percent drop over last year. Trips by auto remain below the level seen in 2019 (-7.7%) but are up 7.4 percent compared to last year.
- An Air Canada pilot's strike that was scheduled for September 2024 did not proceed, and they have an overall reduced schedule to Hawai'i vs. 2023, including Toronto to Maui one time per week was cancelled.
- For the full winter season, WestJet has increased average air capacity to O'ahu by 4 percent, Kauai 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 Sep. 2024P vs. Year-to-Date Sep. 2023)**

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -16.0%	470.7	395.5	545.8
Daily Spend (\$PPPD)	↔ 0.9%	294.4	297.1	297.1
Visitor Days	↓ -16.7%	1,599,011	1,331,287	1,837,054
Arrivals	↓ -14.7%	177,045	151,016	208,756
Daily Census	↓ -17.0%	5,857	4,859	5,019
Airlift (scheduled seats) <sup>^</sup>	↓ -10.7%	245,997	219,561	295,296

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

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

	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -42.7%	689.7	395.5	545.8
Daily Spend (\$PPPD)	↑ 13.2%	262.4	297.1	297.1
Visitor Days	↓ -49.3%	2,628,085	1,331,287	1,837,054
Arrivals	↓ -45.8%	278,530	151,016	208,756
Daily Census	↓ -49.5%	9,627	4,859	5,019
Airlift (scheduled seats) <sup>^</sup>	↓ -41.7%	376,768	219,561	295,296

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

- In the first nine months of 2024, 151,016 visitors arrived from Oceania (Australia and New Zealand) and visitor spending was \$395.5 million. There were 177,045 visitors (-14.7%) in the first nine months of 2023 and visitor spending was \$470.7 million (-16.0%). In the first nine months of pre-pandemic

2019, 278,530 visitors (-45.8%) arrived from this market and visitor spending was \$689.7 million (-42.7%).

- In the first nine months of 2024, there were 604 scheduled flights with 175,889 seats from Melbourne and Sydney compared to 587 flights (+2.9%) with 177,322 seats (-0.8%) in the first nine months of 2023. Air capacity remained below the first nine months of 2019 level (893 flights, -32.4% with 280,708 seats, -37.3%) with service from Brisbane, Melbourne, and Sydney.
- There were 150 scheduled flights with 43,672 seats from Auckland in the first nine months of 2024, compared to 238 flights (-37.0%) with 68,675 seats (-36.4%) in the first nine months of 2023 and 334 flights (-55.1%) with 96,060 seats (-54.5%) in the first nine months of 2019.
- Australian Consumer Confidence recently hit a 19-month high (according to Roy Morgan research). While still below the 85-level benchmark, it reflects the recent improved labor market results.
- In New Zealand, the Reserve Bank of New Zealand (RBNZ) has once again cut interest rates, by .50 percent to 4.75 percent.
- During September 2024, both currencies continued their upward strengthening against the USD. Although more strengthening is needed to improve value perception. The month ended with the following values: AUD 69cents and the NZD 63cents against the USD.
- According to the Australian Bureau of Statistics, in July 2024 a total of 1,146,340 short-term trips were recorded, an increase of 150,760 trips compared with the corresponding month of the previous year. The number of trips for July 2024 was 2.1 percent higher than the pre-COVID level in July 2019.
- New Zealand-resident trips were 314,000 in July 2024, an increase of 25,200 trips from July 2023. The July 2024 figure was 92 percent of pre-COVID-19 level.
- August 2024 arrivals to Hawai'i from Australia/NZ were down 12 percent, which is likely due to reduced service by Hawaiian Airlines from year-round service to now seasonal service to New Zealand. This has reduced airlift to New Zealand by 36 percent year-to-date.

## OTHER ASIA

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

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -17.9%	434.1	356.2	NA
Daily Spend (\$PPPD)	↔ 1.5%	313.2	318.0	NA
Visitor Days	↓ -19.2%	1,386,012	1,120,180	NA
Arrivals	↓ -16.4%	159,595	133,471	NA
Daily Census	↓ -19.5%	5,077	4,088	NA
Airlift (scheduled seats) <sup>^</sup>	↔ 2.7%	208,166	213,694	278,957

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

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

	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -42.3%	617.2	356.2	NA
Daily Spend (\$PPPD)	↑ 10.4%	287.9	318.0	NA
Visitor Days	↓ -47.8%	2,143,962	1,120,180	NA
Arrivals	↓ -50.3%	268,393	133,471	NA
Daily Census	↓ -47.9%	7,853	4,088	NA
Airlift (scheduled seats) <sup>^</sup>	↓ -41.9%	368,085	213,694	278,957

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

## KOREA

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

		YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	👉	-2.5%	322.8	314.8	440.7
Daily Spend (\$PPPD)	👉	0.6%	312.5	314.4	319.6
Visitor Days	👉	-3.1%	1,033,189	1,001,220	1,378,778
Arrivals	👉	-2.1%	120,453	117,927	162,209
Daily Census	👉	-3.4%	3,785	3,654	3,767
Airlift (scheduled seats) <sup>^</sup>	👉	2.7%	208,166	213,694	278,957

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

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

		YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	👇	-10.6%	352.2	314.8	440.7
Daily Spend (\$PPPD)	👆	15.5%	272.3	314.4	319.6
Visitor Days	👇	-22.6%	1,293,565	1,001,220	1,378,778
Arrivals	👇	-28.8%	165,690	117,927	162,209
Daily Census	👇	-22.9%	4,738	3,654	3,767
Airlift (scheduled seats) <sup>^</sup>	👇	-12.4%	244,014	213,694	278,957

\*DBEDT 2024 annual forecast (Quarter 3, 2024). Scheduled seats forecast from Diio Mi flight schedules as of October 22, 2024, subject to change.

- In the first nine months of 2024, 117,927 visitors arrived from Korea and visitor spending was \$314.8 million. There were 120,453 visitors (-2.1%) in the first nine months of 2023 and visitor spending was \$322.8 million (-2.5%). In the first nine months of pre-pandemic 2019, 165,690 visitors (-28.8%) arrived from this market and visitor spending was \$352.2 million (-10.6%).
- In the first nine months of 2024, 701 scheduled flights with 213,694 seats serviced Hawai'i from Korea. In the first nine months of 2023, there were 680 scheduled flights (+3.1%) with 208,166 seats (+2.7%). In the first nine months of 2019 there were 763 scheduled flights (-8.1%) with 244,014 seats (-12.4%).
- In September 2024, South Korea's exports rose by 7.5 percent year-over-year, reaching a 26-month high of \$58.7 billion. However, the Composite Consumer Sentiment Index fell to 100, a decrease of 0.8 points from August 2024.
- The exchange rate for South Korea in September 2024 was 1,333.89 KRW per USD, appreciating from 1,352.16 KRW per USD in August 2024.
- The number of outbound travelers from South Korea in August 2024 reached 2,359,550 departures, reflecting a 12.7 percent increase from the 2,093,236 departures recorded in the same month the previous year.
- A Skyscanner survey of 1,000 Koreans revealed that 23 percent are considering a destination wedding, with 50 percent of those in relationships expressing interest. Younger individuals, particularly those 18-24 years old, showed a stronger preference for weddings abroad at 62 percent. The primary motivation, cited by 39 percent of respondents, is the desire for a more unique and emotionally significant ceremony, indicating a trend towards personalized, non-traditional weddings.
- Korean Air is anticipated to be actively working on finalizing its merger with Asiana Airlines and expanding its international routes by the end of 2024. The merger is contingent upon approval from the U.S. Department of Justice, with a decision expected in October 2024. Following the merger, Asiana will initially function as a subsidiary before fully integrating into a single airline within two years, establishing a global top 10 "mega carrier." Additionally, Korean Air plans to enhance popular routes to Japan, Southeast Asia, China, the U.S., and Europe, aiming to restore its flight capacity to pre-COVID-19 levels.

- In September 2024, Korean Air operated daily flights, while Asiana Airlines and Hawaiian Airlines each operated five weekly flights..

## CHINA

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

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -64.9%	79.7	28.0	NA
Daily Spend (\$PPPD)	👉 -5.5%	370.1	349.9	NA
Visitor Days	↓ -62.8%	215,413	80,086	NA
Arrivals	↓ -55.3%	24,980	11,170	NA
Daily Census	↓ -63.0%	789	292	NA
Airlift (scheduled seats)^	N/A	N/A	N/A	N/A

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

	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -85.9%	199.1	28.0	NA
Daily Spend (\$PPPD)	👉 7.3%	326.2	349.9	NA
Visitor Days	↓ -86.9%	610,356	80,086	NA
Arrivals	↓ -85.3%	75,805	11,170	NA
Daily Census	↓ -86.9%	2,236	292	NA
Airlift (scheduled seats)^	N/A	93,471	N/A	N/A

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

2024P visitor data are preliminary and under-reported, pending final immigration reports from the National Travel and Tourism Office (NTTO).

2019 and 2023 visitor data are the final numbers and reflect updated airfares from DIIO Mi airline database, immigration data from the NTTO and passenger counts from Airline Traffic Summary reports

- In the first nine months of 2024, 11,170 visitors arrived from China and visitor spending was \$28.0 million. There were 24,980 visitors in the first nine months of 2023 and visitor spending was \$79.7 million. In the first nine months of pre-pandemic 2019, 75,805 visitors arrived from this market and visitor spending was \$199.1 million.
- There have been no direct flights from China to Hawai'i since service ended in early February 2020. There were 340 flights with 93,471 seats in the first nine months of 2019 with service to Shanghai (67,744 seats), Beijing (24,941) and Hangzhou (786).
- As of September 2024, the month-end (ME) exchange rate for the Chinese Yuan (CNY) against the USD was 7.00, compared to 7.13 in August 2024 and 7.17 in September 2023.
- The annual inflation rate in China is projected to be 0.4 percent for September 2024, down from 0.6 percent in August 2024 and up from 0.2 percent in September 2023.
- Tourism ministers from China, Japan, and South Korea met in Japan to strengthen cultural and tourism collaboration. They established a new target to increase mutual tourist exchanges among the three countries to 40 million by 2030. This marks the tenth session of the Tripartite Tourism Ministers' Meeting, which was initiated in 2006 and resumed after a five-year hiatus due to the pandemic. The 2030 target represents an increase of 10 million tourists compared to pre-pandemic levels.
- As of March 31, 2024 the FAA has authorized Chinese mainland airlines to operate 50 round-trip flights per week between China and the United States. In parallel, US airlines can apply for 50 weekly direct flights to mainland China. Airlines are not permitted to alter flight origins, destinations, dates, or the number of flights without prior application. Currently, Chinese mainland airlines have fully utilized all 50 round-trip flight slots. However, the number of flights between China and the United States remains significantly lower than pre-pandemic levels, and the recovery rate is lagging behind that of Asian and European countries.

## EUROPE

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

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -34.4%	288.0	189.0	261.9
Daily Spend (\$PPPD)	↓ -14.1%	243.9	209.5	227.5
Visitor Days	↓ -23.6%	1,180,999	902,170	1,150,933
Arrivals	↓ -24.3%	91,227	69,088	85,571
Daily Census	↓ -23.9%	4,326	3,293	3,145
Airlift (scheduled seats)^	N/A	N/A	N/A	N/A

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

	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	↓ -10.5%	211.3	189.0	261.9
Daily Spend (\$PPPD)	↑ 33.0%	157.6	209.5	227.5
Visitor Days	↓ -32.7%	1,341,011	902,170	1,150,933
Arrivals	↓ -33.4%	103,667	69,088	85,571
Daily Census	↓ -33.0%	4,912	3,293	3,145
Airlift (scheduled seats)^	N/A	N/A	N/A	N/A

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

2024P visitor data are preliminary and under-reported, pending final immigration reports from the National Travel and Tourism Office (NTTO).

2019 and 2023 visitor data are the final numbers and reflect updated airfares from DIO Mi airline database, immigration data from the NTTO and passenger counts from Airline Traffic Summary reports.

- In the first nine months of 2024, 69,088 visitors arrived from Europe (including United Kingdom, France, Germany, Italy, and Switzerland) and visitor spending was \$189.0 million. It should be noted that 2024 data are preliminary and under-reported, pending final immigration reports from the National Travel and Tourism Office. There were 91,227 visitors in the first nine months of 2023 and visitor spending was \$288.0 million. In the first nine months of pre-pandemic 2019, 103,667 visitors arrived from this market and visitor spending was \$211.3 million.
- In September 2024, the British Pound experienced a slight appreciation, reaching 1.31 USD. The Euro averaged around 1.11 USD, reflecting an increase of approximately 3.7 percent compared to August 2024. The CHF/USD exchange rate averaged 1.12 USD, indicating a minor depreciation from August 2024, when it averaged 1.15 USD.
- In the UK, economic growth in 2024 has exceeded expectations, while inflation has returned to the Bank of England's target of 2.0 percent. The GfK Consumer Confidence indicator remains at -13.0, unchanged from August 2024. Despite this negative figure, it represents the highest level since September 2021, suggesting a growing sense of optimism among consumers over the past three years.
- In Germany, after a notable decline in the previous month, consumer sentiment showed a slight recovery in September 2024. Improvements in income expectations and purchasing willingness have contributed to a projected increase in the consumer climate for October 2024, rising by 0.7 points to -21.2 points from -21.9 points of the previous month.
- In Switzerland, consumer sentiment remained relatively stable in September 2024 compared to the prior month. The monthly consumer sentiment index from the State Secretariat for Economic Affairs (SECO) recorded -34.0 points, up from -35.0 points in August 2024. This figure is higher than the level recorded a year ago, as reported by SECO.
- In the UK, the shoulder season is emerging as a popular time for travel, with many consumers opting to begin their summer vacations earlier and take breaks outside the peak summer period. This trend is anticipated to continue growing into 2025 and beyond, according to a report from British Airways Holidays.



- According to TUI Germany, travel trends for 2025 include: an increase in multi-generational travel involving the entire family, including grandparents; a rise in solo travel, which allows individuals to explore at their own pace and forge new connections; and a growing popularity of bleisure travel.

## LATIN AMERICA

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

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	-19.9%	67.4	54.0	NA
Daily Spend (\$PPPD)	-19.3%	303.4	244.8	NA
Visitor Days	-0.7%	222,194	220,543	NA
Arrivals	0.5%	21,187	21,283	NA
Daily Census	-1.1%	814	805	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 Sep. 2024P vs. Year-to-Date Sep. 2019)

	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*
Visitor Spending (\$mil)	13.3%	47.6	54.0	NA
Daily Spend (\$PPPD)	5.4%	232.2	244.8	NA
Visitor Days	7.5%	205,158	220,543	NA
Arrivals	9.6%	19,422	21,283	NA
Daily Census	7.1%	751	805	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 nine months of 2024, there were 4,366,790 visitors to O'ahu, compared to 4,211,489 visitors (+3.7%) in the first nine months of 2023 and 4,657,880 visitors (-6.2%) in the first nine months of 2019. For the first nine months of 2024, total visitor spending was \$6.91 billion, which was higher than \$6.72 billion (+2.8%) in the first nine months of 2023 and \$6.11 billion (+13.1%) in the first nine months of 2019.
- **Maui:** In the first nine months of 2024, there were 1,739,257 visitors to Maui compared to 2,000,554 visitors (-13.1%) in the first nine months of 2023 and 2,314,113 visitors (-24.8%) in the first nine months of 2019. For the first nine months of 2024, total visitor spending was \$3.88 billion, compared to \$4.62 billion (-15.9%) in the first nine months of 2023 and \$3.86 billion (+0.6%) in the first nine months of 2019.
- **Hawai'i Island:** In the first nine months of 2024, there were 1,298,088 visitors to Hawai'i Island compared to 1,343,210 visitors (-3.4%) in the first nine months of 2023 and 1,323,943 visitors (-2.0%) in the first nine months of 2019. For the first nine months of 2024, total visitor spending was \$2.37 billion, compared to \$2.21 billion (+7.1%) in the first nine months of 2023 and \$1.72 billion (+38.2%) in the first nine months of 2019.
- **Kaua'i:** In the first nine months of 2024, there were 1,036,739 visitors to Kaua'i, compared to 1,080,660 visitors (-4.1%) in the first nine months of 2023 and 1,039,227 visitors (-0.2%) in the first nine months of 2019. For the first nine months of 2024, total visitor spending was \$2.18 billion, compared to \$2.06 billion (+5.8%) in the first nine months of 2023 and \$1.46 billion (+49.5%) in the first nine months of 2019.

**10**  
**Dashboard**  
**September 2024**

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **OVERALL**

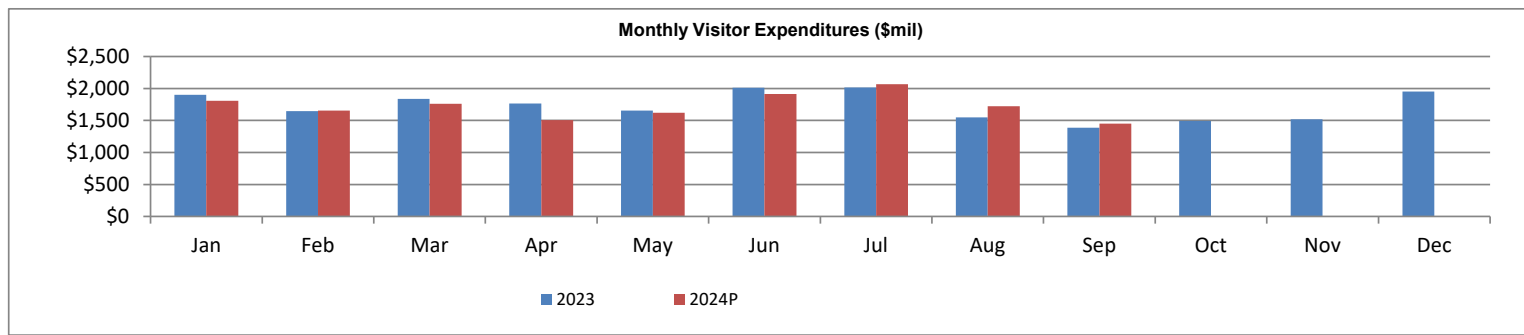
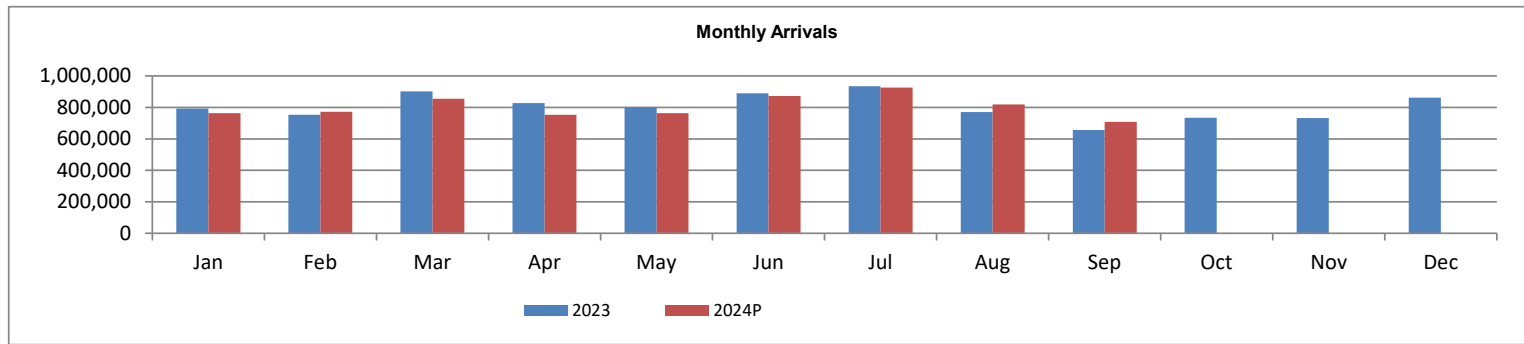
Key Performance Indicators

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD	
Visitor Spending (\$mil)	↘	-1.7%	15,771.4	15,504.7	20,593.7	O'ahu	3.7%	4,366,790
Daily Spend (\$PPPD)	↘	2.3%	240.1	245.7	244.0	Maui	-13.1%	1,739,257
Visitor Days	↘	-3.9%	65,690,341	63,116,487	84,392,803	Moloka'i	-3.3%	23,991
Arrivals	↘	-1.3%	7,328,239	7,233,501	9,564,557	Lāna'i	-16.8%	35,296
Daily Census	↘	-4.3%	240,624	230,352	230,581	Kaua'i	-4.1%	1,036,739
Airlift (scheduled seats)^	↗	0.6%	9,897,982	9,952,664	13,251,219	Hawai'i Island	-3.4%	1,298,088

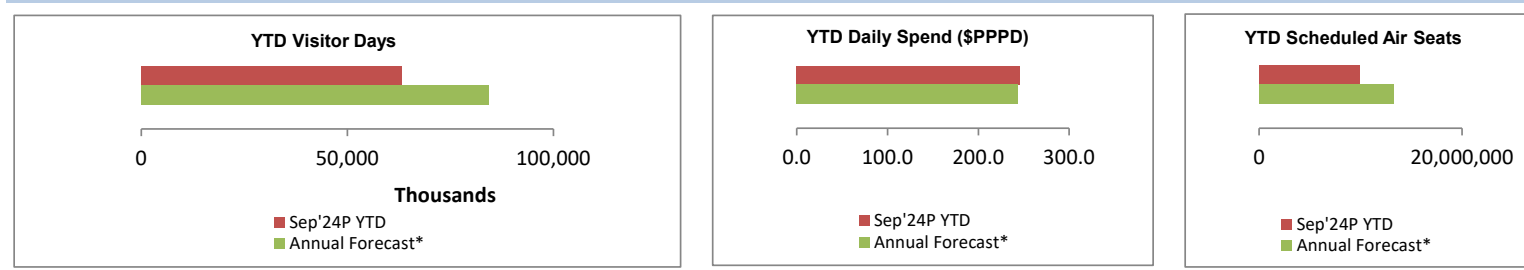
\* DBEDT Annual Forecast as of Q3 2024.

^ DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **U.S. TOTAL**

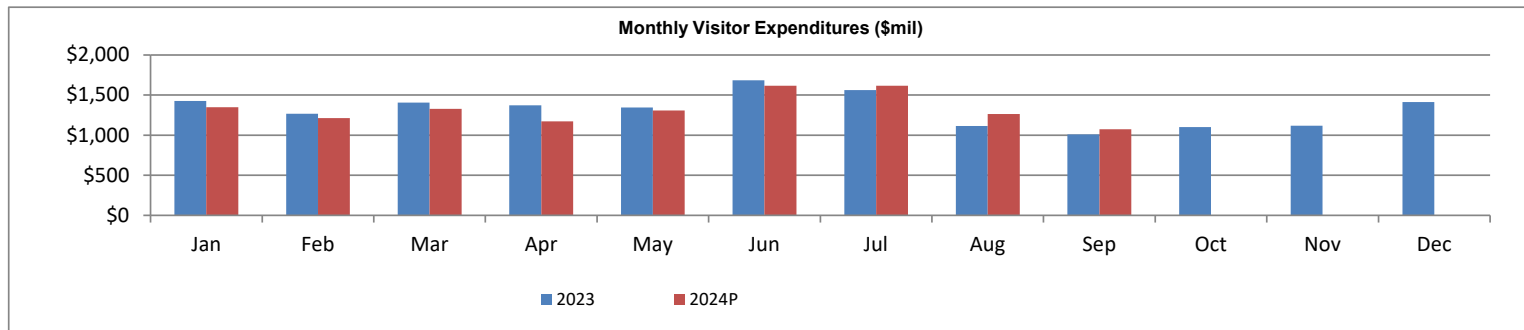
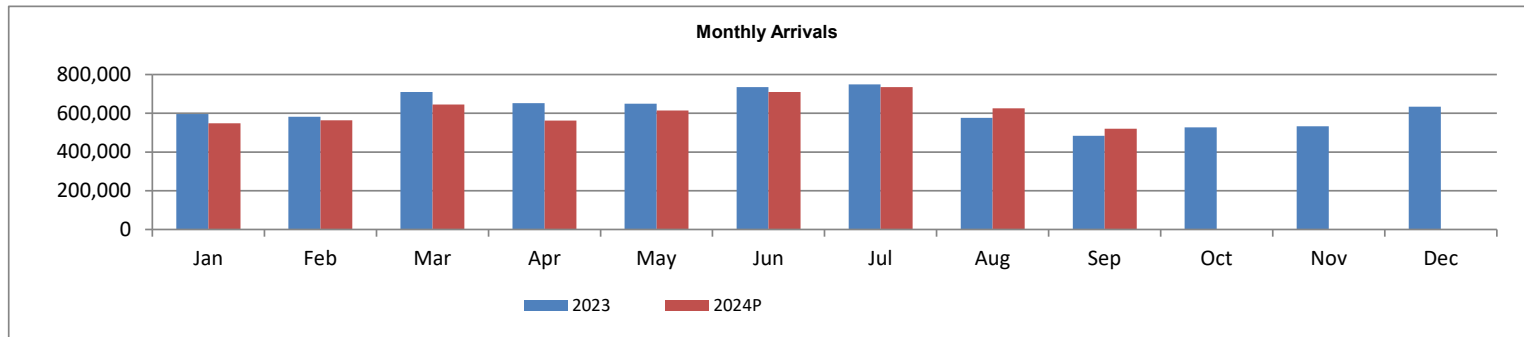
Key Performance Indicators

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	👇 -2.1%	12,191.5	11,934.0	15,794.7	O'ahu	0.1%	2,997,759
Daily Spend (\$PPPD)	👇 2.8%	239.0	245.7	244.2	Maui	-12.0%	1,484,731
Visitor Days	👇 -4.8%	51,004,451	48,570,600	64,673,205	Moloka'i	-1.5%	17,488
Arrivals	👇 -3.6%	5,732,363	5,523,201	7,268,850	Lāna'i	-12.5%	27,107
Daily Census	👇 -5.1%	186,829	177,265	176,703	Kaua'i	-3.8%	918,533
Airlift (scheduled seats) <sup>^</sup>	👇 -2.5%	8,162,127	7,954,498	10,572,881	Hawai'i Island	-4.5%	1,067,500

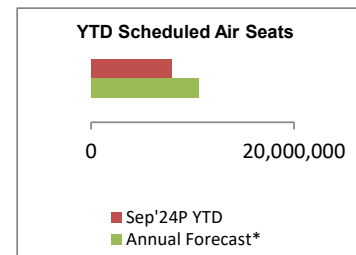
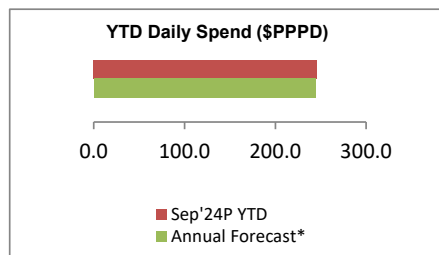
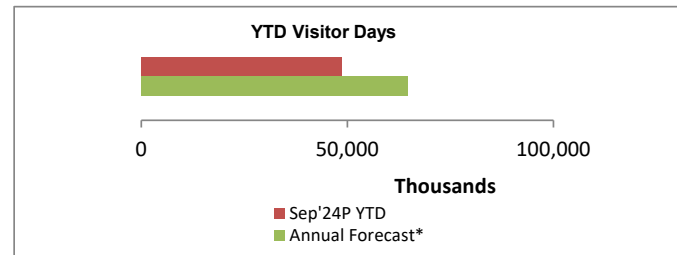
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **U.S. WEST**

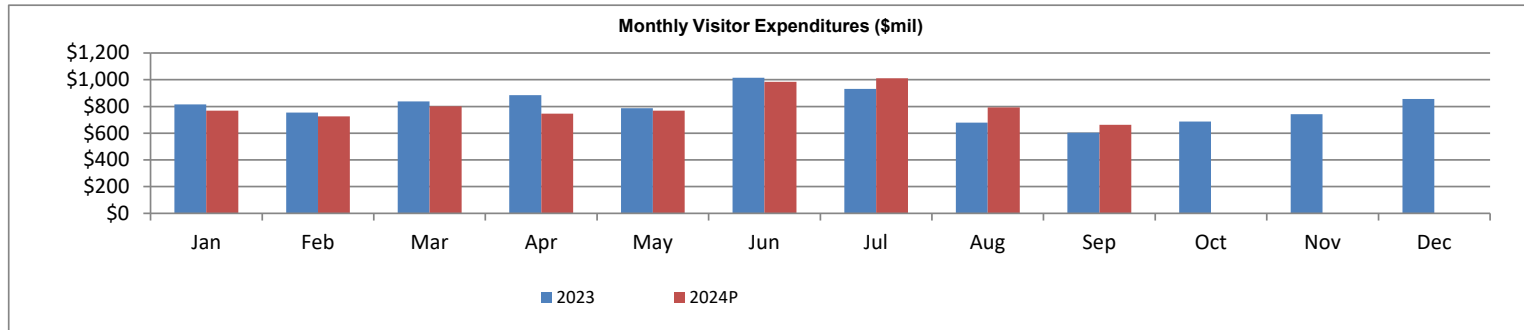
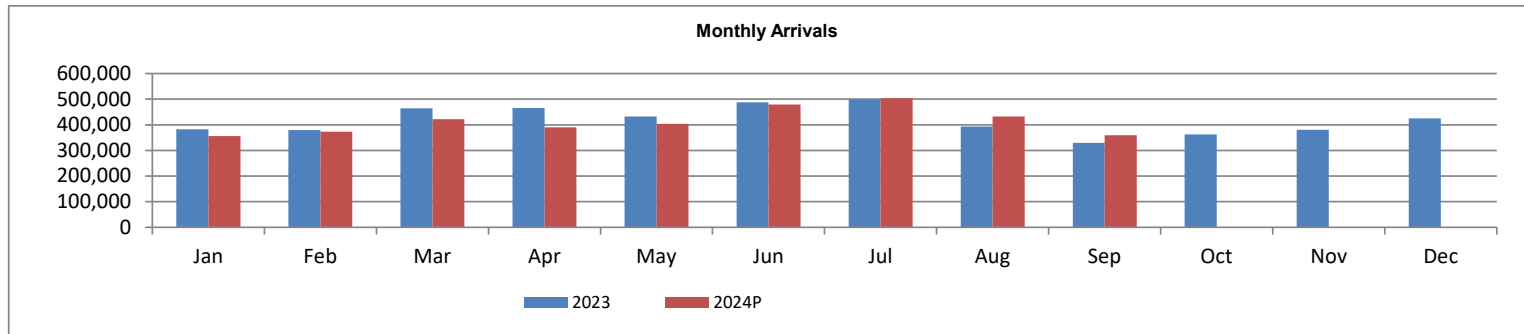
Key Performance Indicators

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD	
Visitor Spending (\$mil)	↘	-0.6%	7,308.5	7,262.1	9,606.9	O'ahu	1.5%	1,884,449
Daily Spend (\$PPPD)	↘	3.6%	225.1	233.2	232.1	Mau	-10.4%	967,244
Visitor Days	↘	-4.1%	32,463,933	31,134,868	41,385,615	Moloka'i	1.3%	10,284
Arrivals	↘	-2.9%	3,832,439	3,720,251	4,880,379	Lāna'i	-8.8%	15,156
Daily Census	↘	-4.4%	118,916	113,631	113,075	Kaua'i	-3.8%	591,045
Airlift (scheduled seats) <sup>^</sup>	↘	-2.1%	7,217,148	7,065,838	9,377,384	Hawai'i Island	-4.4%	669,868

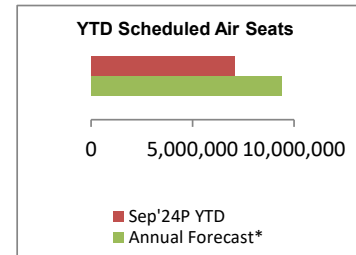
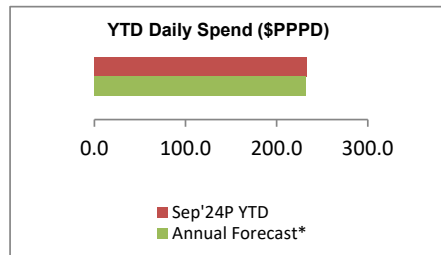
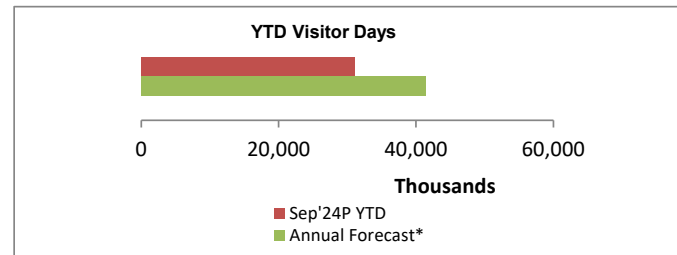
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **U.S. EAST**

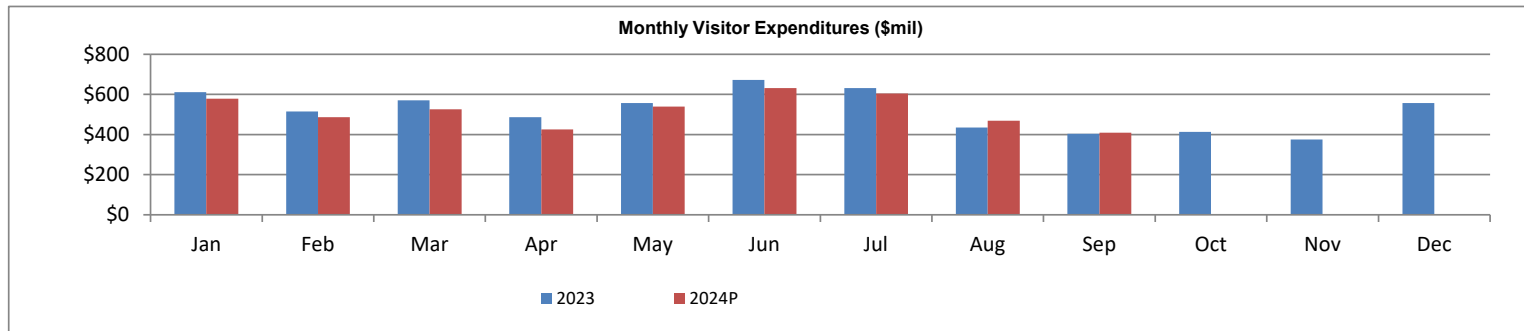
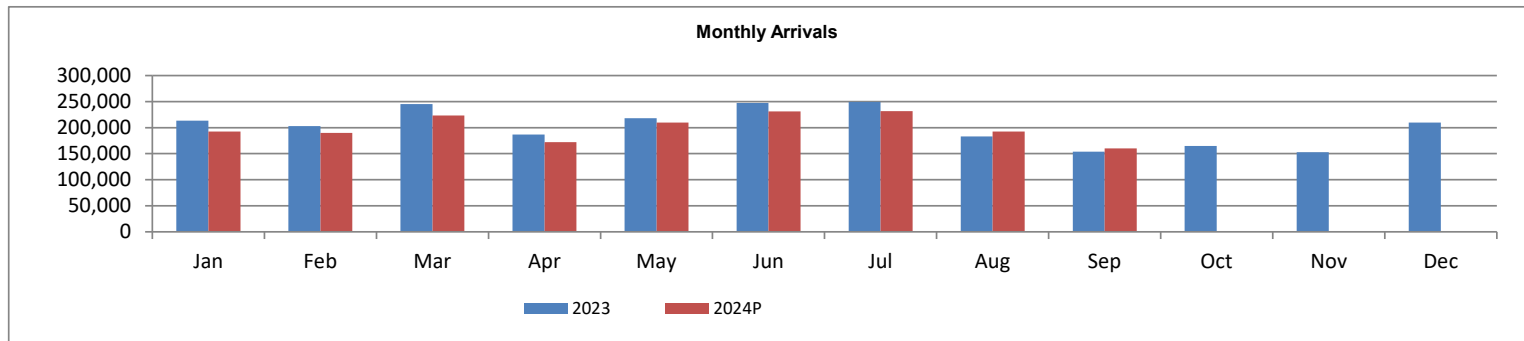
Key Performance Indicators

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↘ -4.3%	4,883.0	4,671.9	6,187.8	O'ahu	-2.3%	1,113,309
Daily Spend (\$PPPD)	↘ 1.7%	263.4	267.9	265.7	Maui	-14.9%	517,487
Visitor Days	↘ -6.0%	18,540,517	17,435,732	23,287,590	Moloka'i	-5.3%	7,204
Arrivals	↘ -5.1%	1,899,924	1,802,950	2,388,471	Lāna'i	-16.9%	11,951
Daily Census	↘ -6.3%	67,914	63,634	63,627	Kaua'i	-3.8%	327,488
Airlift (scheduled seats) <sup>^</sup>	↘ -6.0%	944,979	888,660	1,195,497	Hawai'i Island	-4.7%	397,632

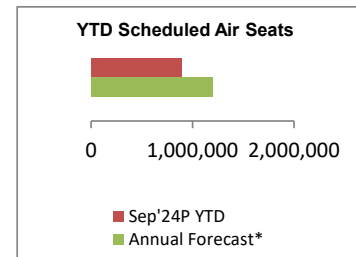
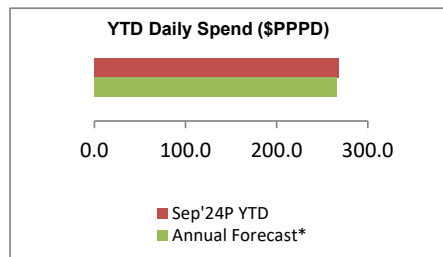
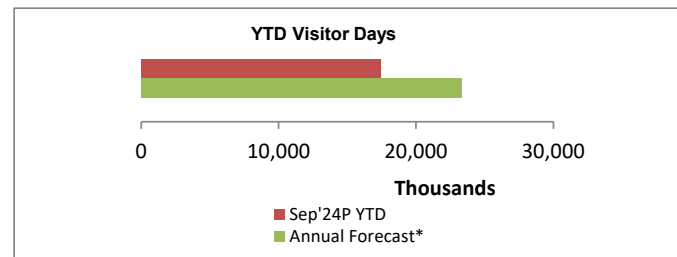
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **JAPAN**

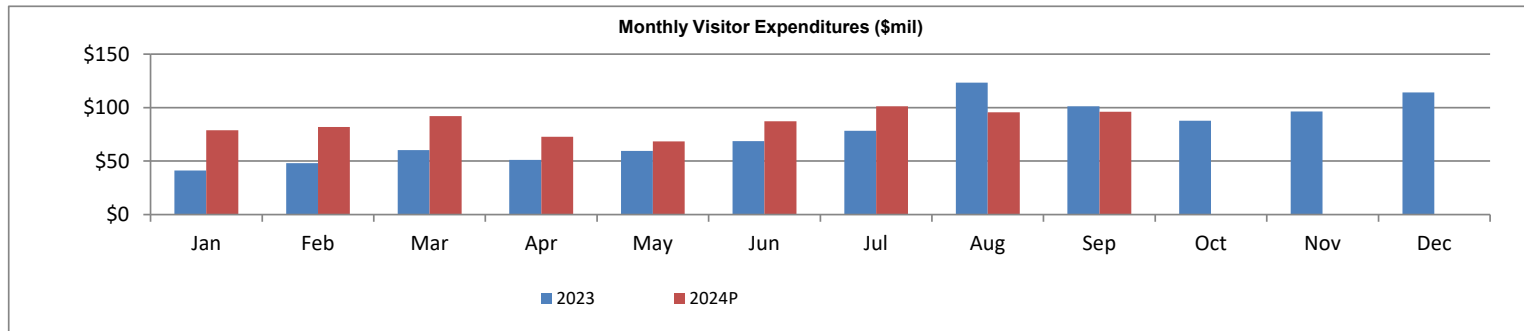
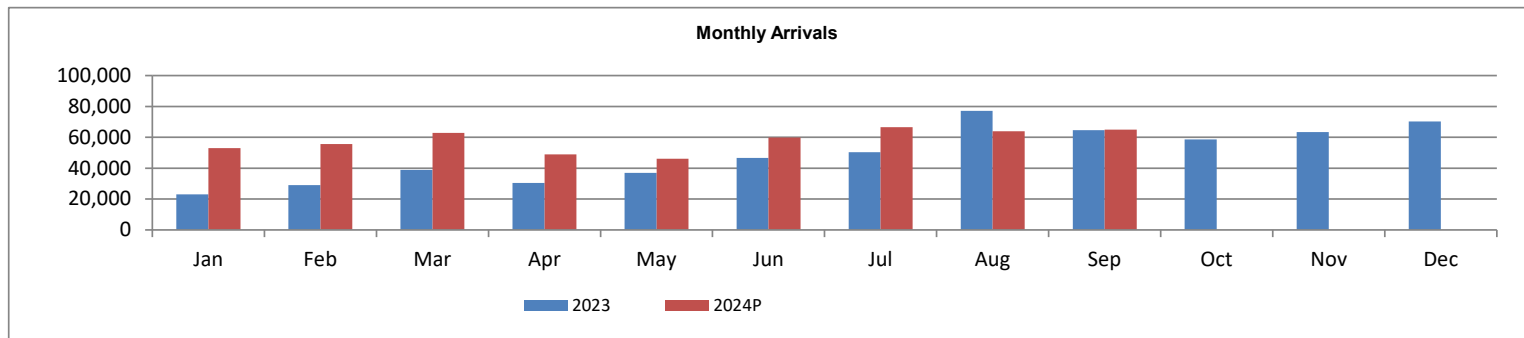
Key Performance Indicators

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↑ 22.6%	632.0	774.6	1,070.5	O'ahu	32.6%	510,025
Daily Spend (\$PPPD)	→ 0.0%	238.1	238.1	241.9	Maui	23.8%	9,830
Visitor Days	↑ 22.6%	2,654,633	3,253,593	4,424,958	Moloka'i	25.2%	582
Arrivals	↑ 31.6%	396,802	522,021	717,173	Lāna'i	3.3%	323
Daily Census	↑ 22.1%	9,724	11,874	12,090	Kaua'i	18.5%	4,939
Airlift (scheduled seats) <sup>^</sup>	↑ 41.6%	740,118	1,047,728	1,384,543	Hawai'i Island	11.4%	36,451

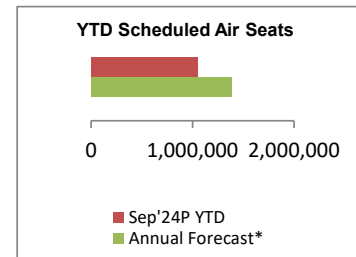
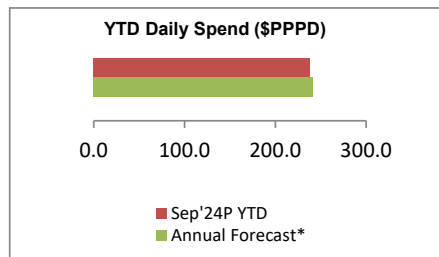
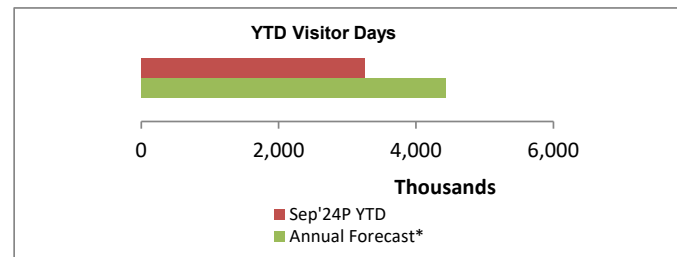
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **CANADA**

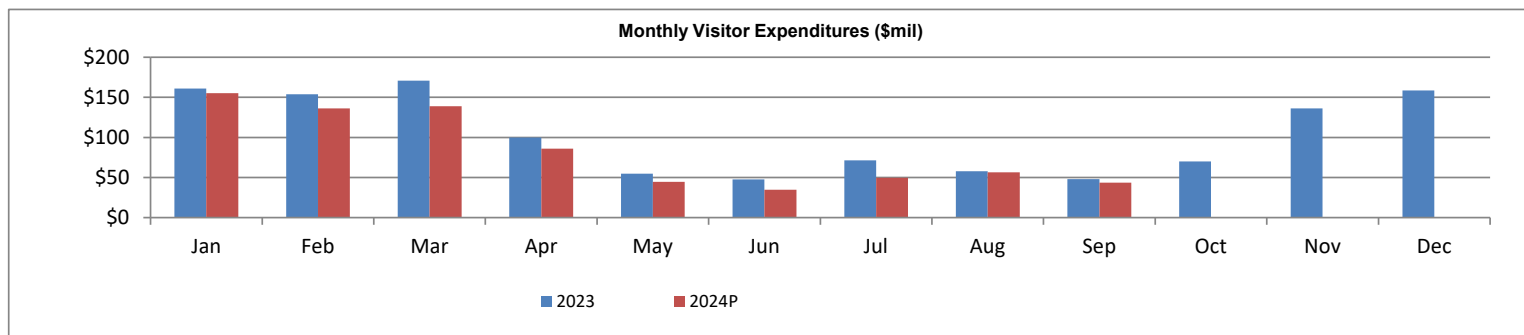
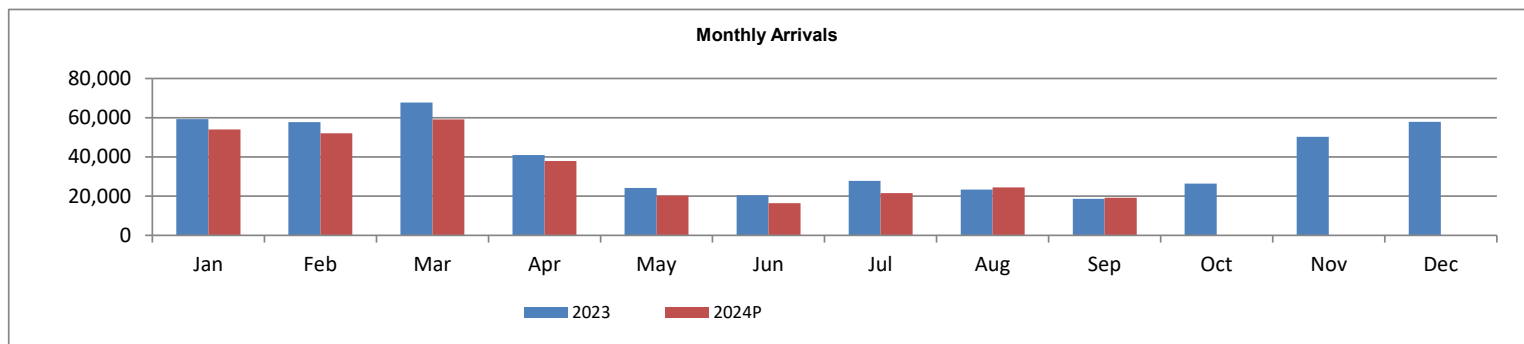
Key Performance Indicators

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -13.8%	865.5	745.8	1,093.6	O'ahu	-1.5%	173,937
Daily Spend (\$PPPD)	↔ 1.9%	217.8	222.0	223.7	Mauī	-30.3%	112,897
Visitor Days	↓ -15.5%	3,972,855	3,358,907	4,887,902	Moloka'i	-14.5%	1,715
Arrivals	↓ -10.3%	340,217	305,029	432,558	Lāna'i	-49.6%	1,497
Daily Census	↓ -15.8%	14,553	12,259	13,355	Kaua'i	-20.3%	31,986
Airlift (scheduled seats) <sup>^</sup>	↓ -10.9%	334,807	298,186	420,129	Hawai'i Island	-15.0%	51,956

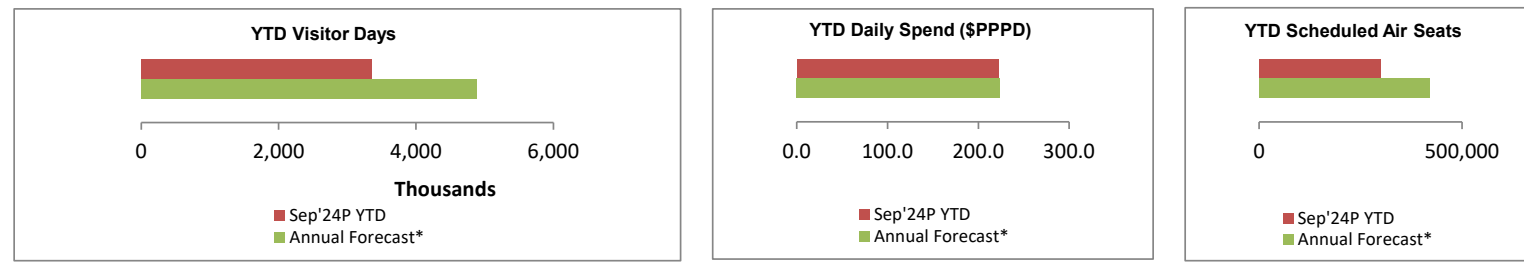
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures



HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **OCEANIA**

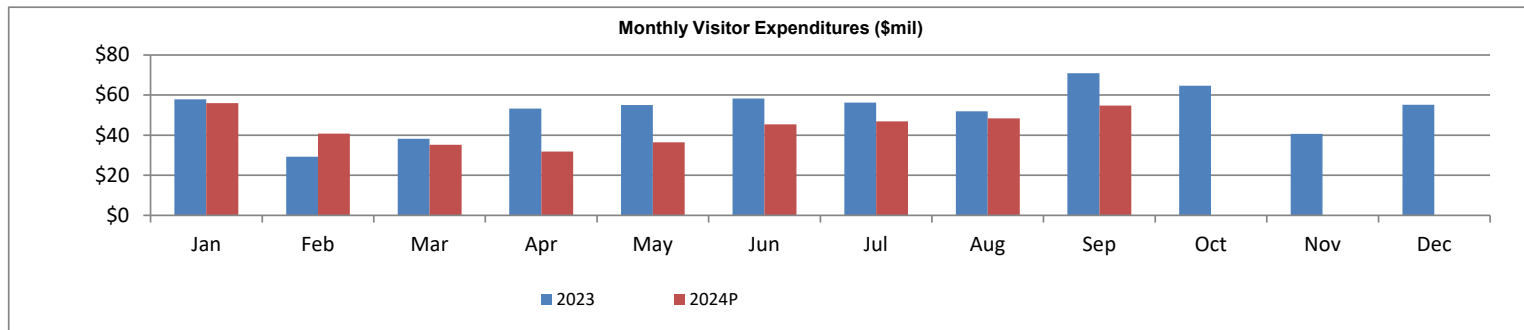
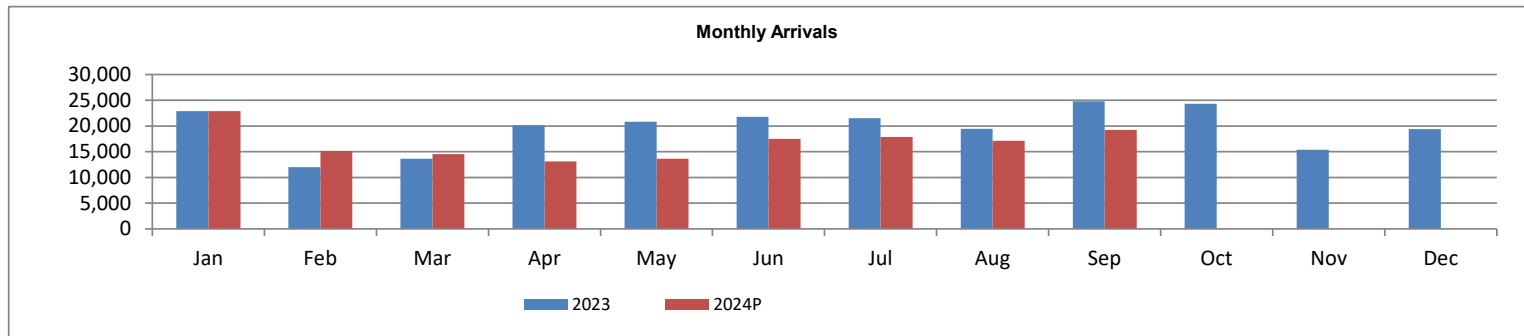
Key Performance Indicators

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -16.0%	470.7	395.5	545.8	O'ahu	-15.0%	147,873
Daily Spend (\$PPPD)	↔ 0.9%	294.4	297.1	297.1	Mauī	-19.6%	15,332
Visitor Days	↓ -16.7%	1,599,011	1,331,287	1,837,054	Moloka'i	2.8%	1,400
Arrivals	↓ -14.7%	177,045	151,016	208,756	Lāna'i	-10.5%	1,512
Daily Census	↓ -17.0%	5,857	4,859	5,019	Kaua'i	-2.8%	11,634
Airlift (scheduled seats) <sup>^</sup>	↓ -10.7%	245,997	219,561	295,296	Hawai'i Island	-11.8%	16,240

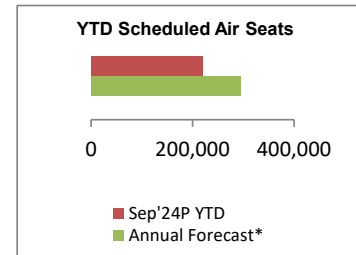
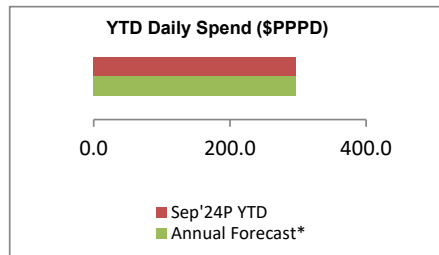
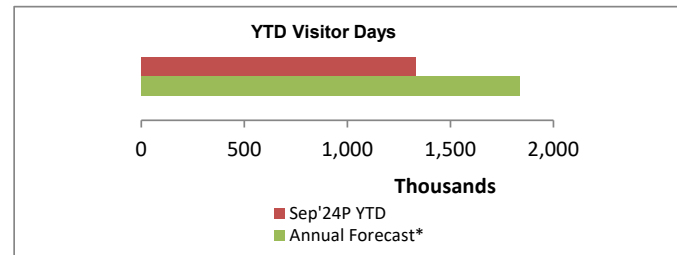
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **OTHER ASIA**

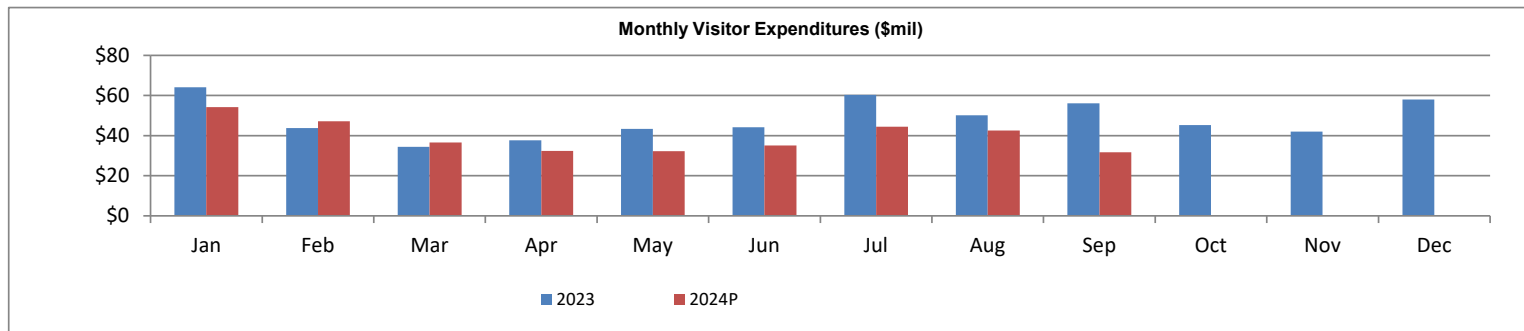
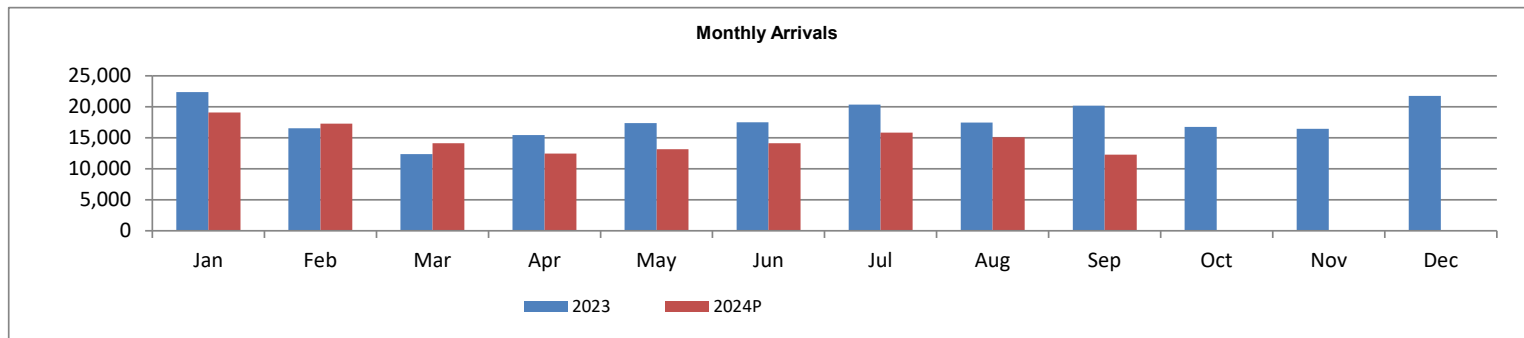
Key Performance Indicators

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -17.9%	434.1	356.2	NA	O'ahu	-17.0%	128,523
Daily Spend (\$PPPD)	↔ 1.5%	313.2	318.0	NA	Mau	-54.2%	7,419
Visitor Days	↓ -19.2%	1,386,012	1,120,180	NA	Moloka'i	26.3%	314
Arrivals	↓ -16.4%	159,595	133,471	NA	Lāna'i	-43.7%	309
Daily Census	↓ -19.5%	5,077	4,088	NA	Kaua'i	-26.6%	4,809
Airlift (scheduled seats) <sup>^</sup>	↔ 2.7%	208,166	213,694	278,957	Hawai'i Island	-11.7%	26,458

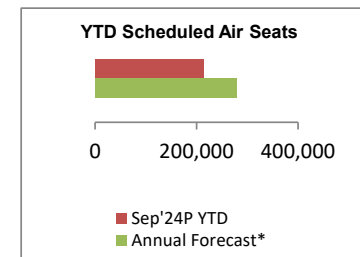
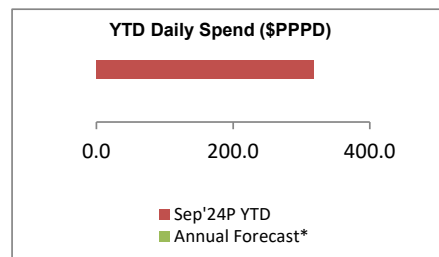
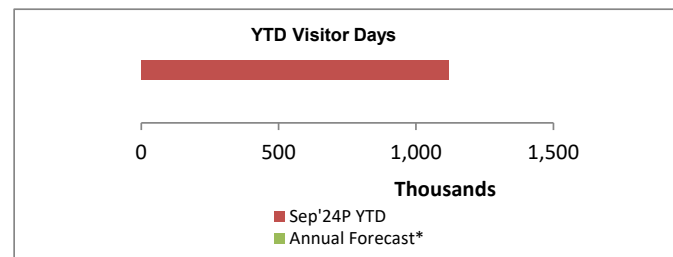
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **KOREA**

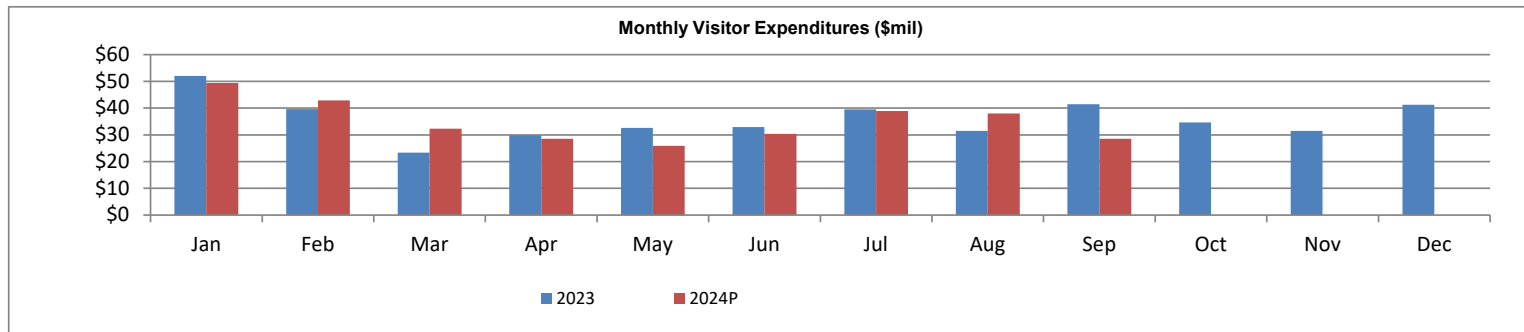
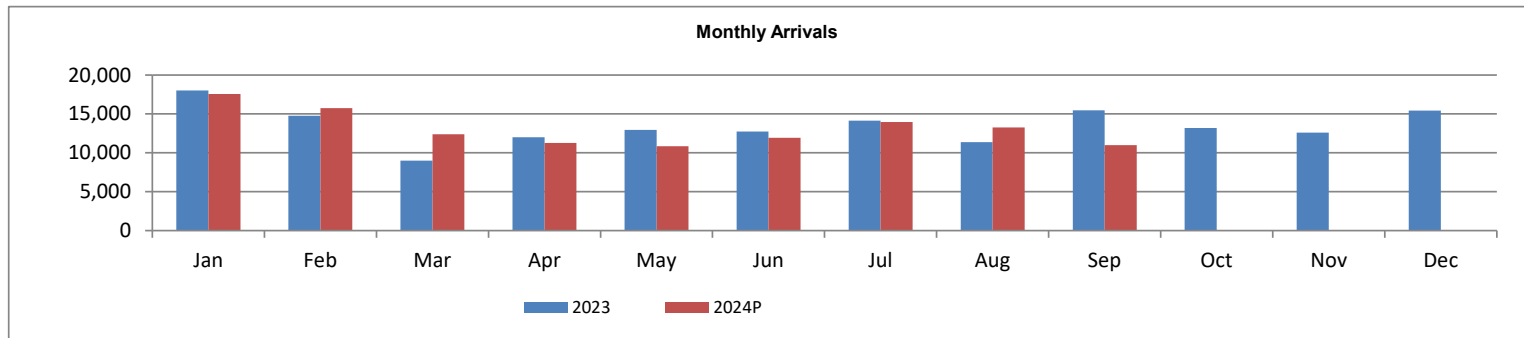
Key Performance Indicators

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	🔻 -2.5%	322.8	314.8	440.7	O'ahu	-2.8%	115,618
Daily Spend (\$PPPD)	🔻 0.6%	312.5	314.4	319.6	Mau	-45.2%	5,126
Visitor Days	🔻 -3.1%	1,033,189	1,001,220	1,378,778	Moloka'i	80.3%	261
Arrivals	🔻 -2.1%	120,453	117,927	162,209	Lāna'i	-63.1%	171
Daily Census	🔻 -3.4%	3,785	3,654	3,767	Kaua'i	0.8%	3,692
Airlift (scheduled seats) <sup>^</sup>	🔻 2.7%	208,166	213,694	278,957	Hawai'i Island	11.7%	22,468

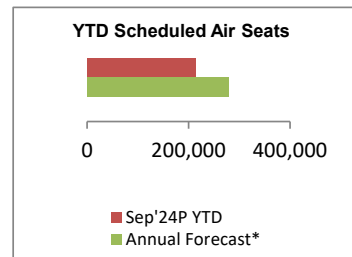
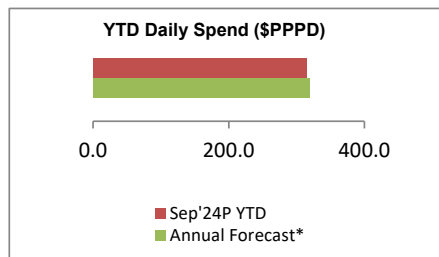
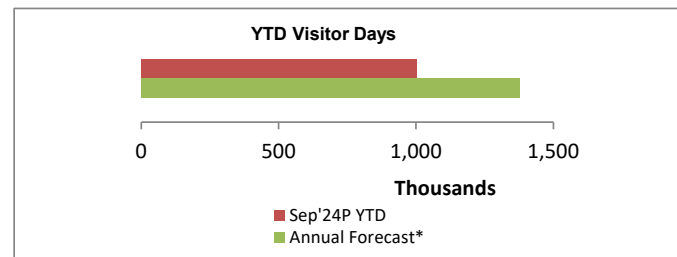
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **CHINA**

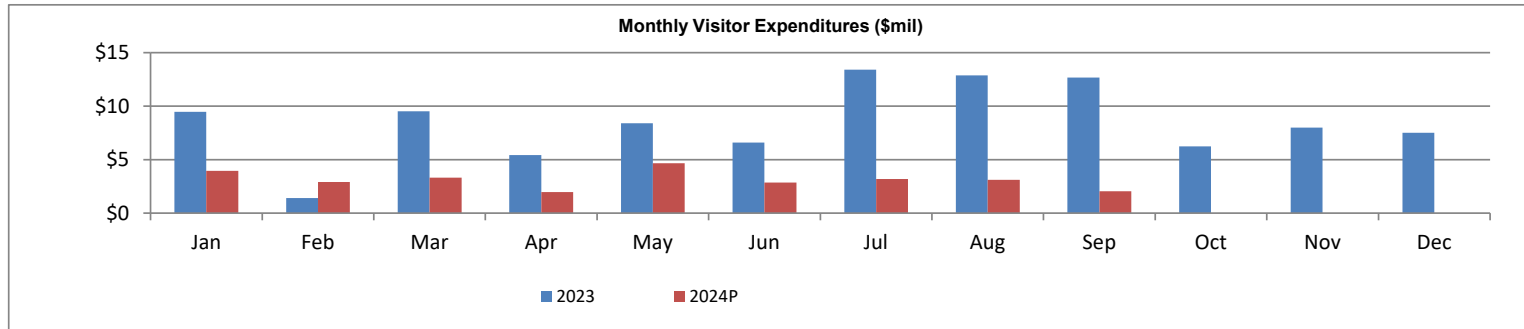
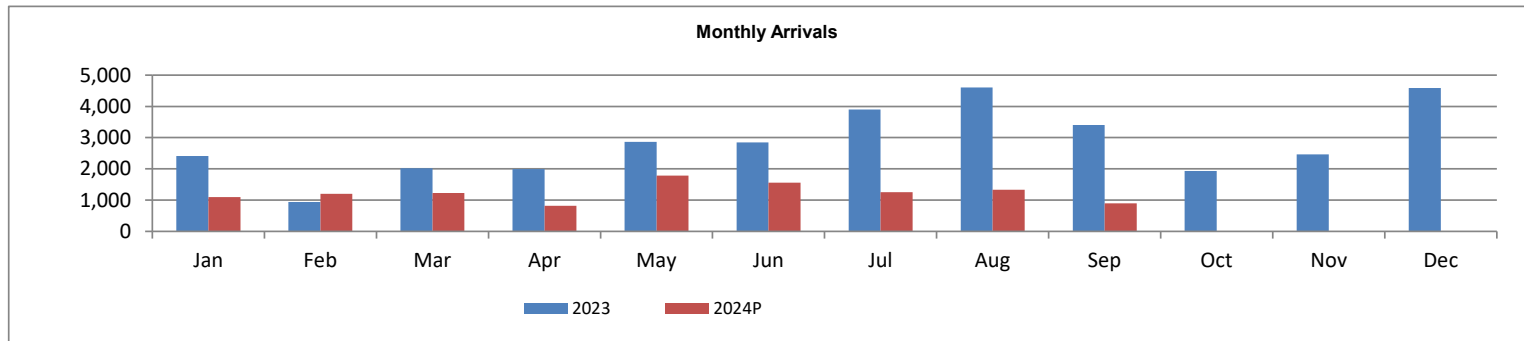
Key Performance Indicators

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -64.9%	79.7	28.0	NA	O'ahu	-58.2%	9,721
Daily Spend (\$PPPD)	↔ -5.5%	370.1	349.9	NA	Mau	-68.1%	1,451
Visitor Days	↓ -62.8%	215,413	80,086	NA	Moloka'i	55.8%	35
Arrivals	↓ -55.3%	24,980	11,170	NA	Lāna'i	64.4%	108
Daily Census	↓ -63.0%	789	292	NA	Kaua'i	-67.6%	660
Airlift (scheduled seats) <sup>^</sup>	N/A	N/A	N/A	N/A	Hawai'i Island	-57.5%	3,085

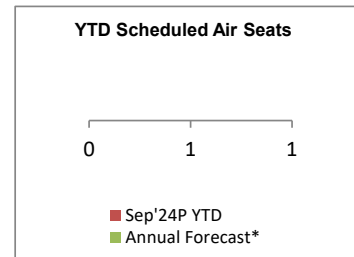
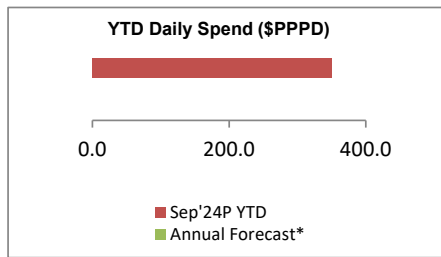
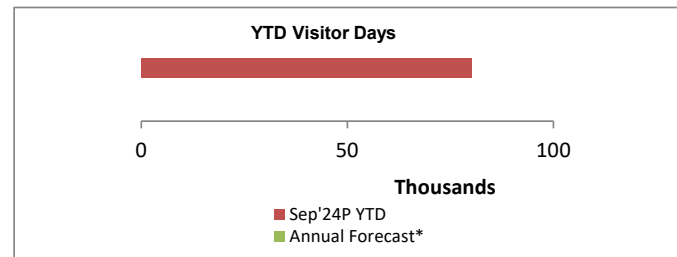
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **EUROPE**

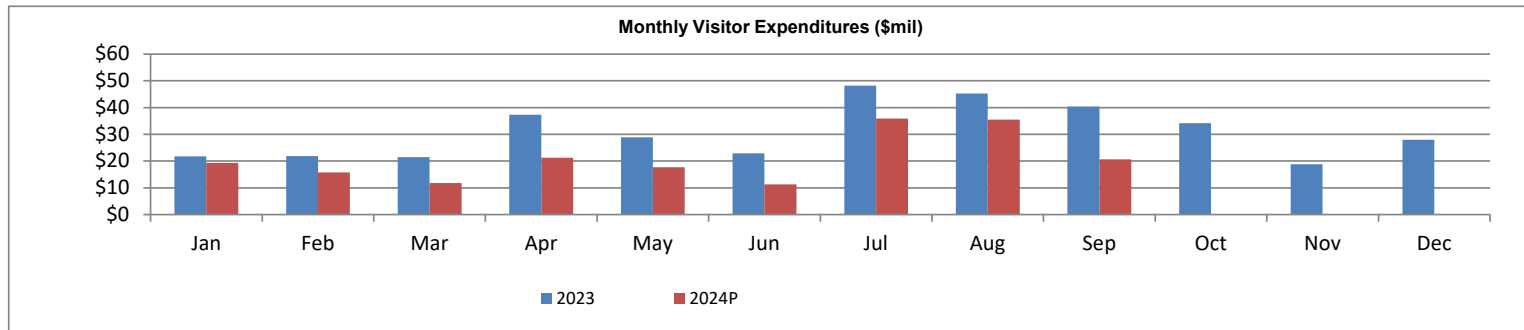
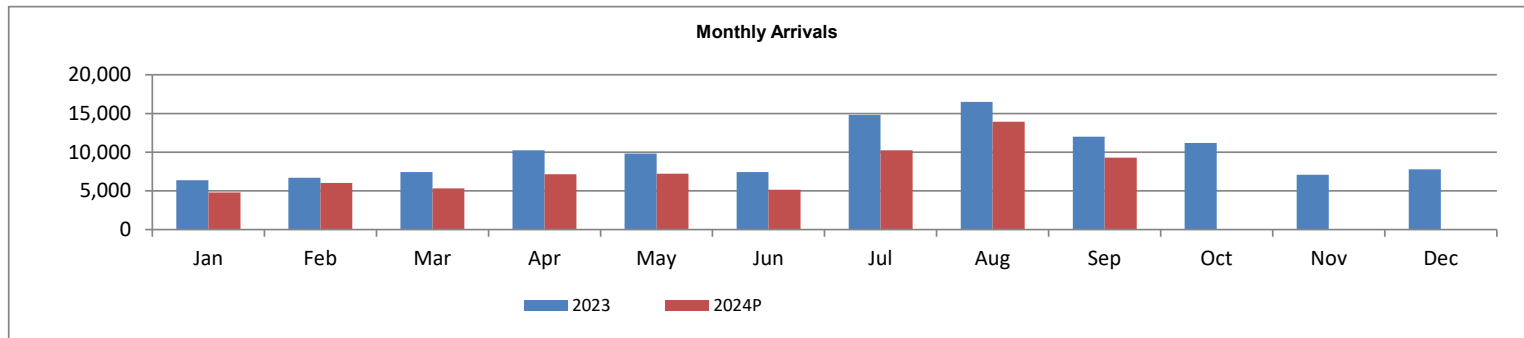
Key Performance Indicators

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -34.4%	288.0	189.0	261.9	O'ahu	-24.7%	54,158
Daily Spend (\$PPPD)	↓ -14.1%	243.9	209.5	227.5	Mauī	-28.3%	22,890
Visitor Days	↓ -23.6%	1,180,999	902,170	1,150,933	Moloka'i	-51.1%	459
Arrivals	↓ -24.3%	91,227	69,088	85,571	Lāna'i	-76.0%	327
Daily Census	↓ -23.9%	4,326	3,293	3,145	Kaua'i	-22.1%	17,077
Airlift (scheduled seats) <sup>^</sup>	N/A	N/A	N/A	N/A	Hawai'i Island	-23.6%	21,534

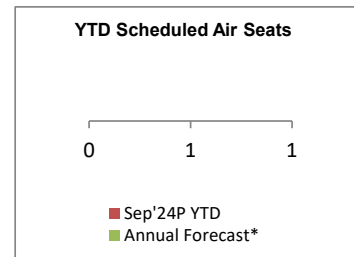
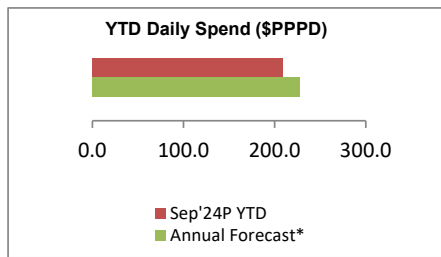
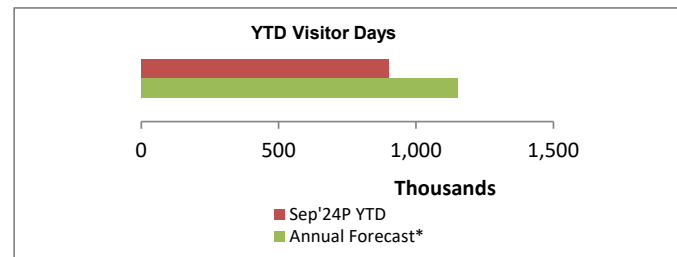
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **LATIN AMERICA**

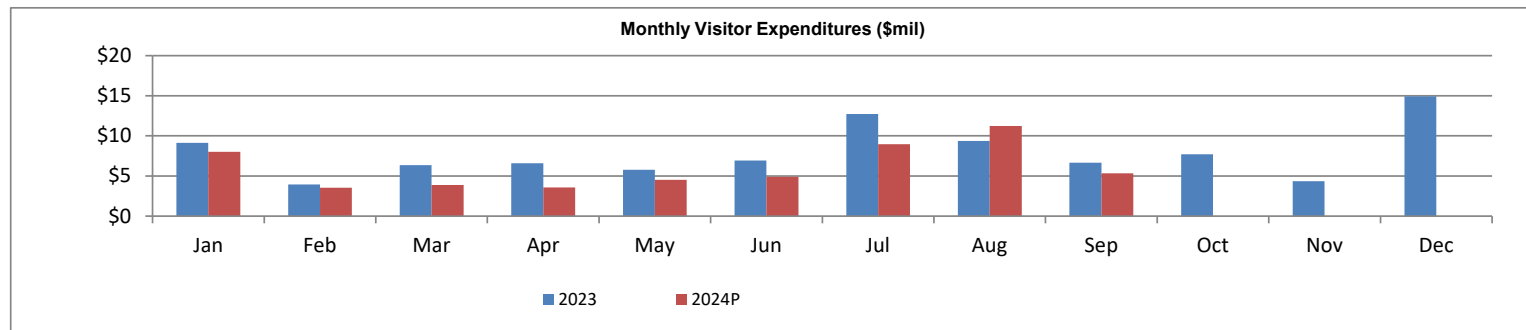
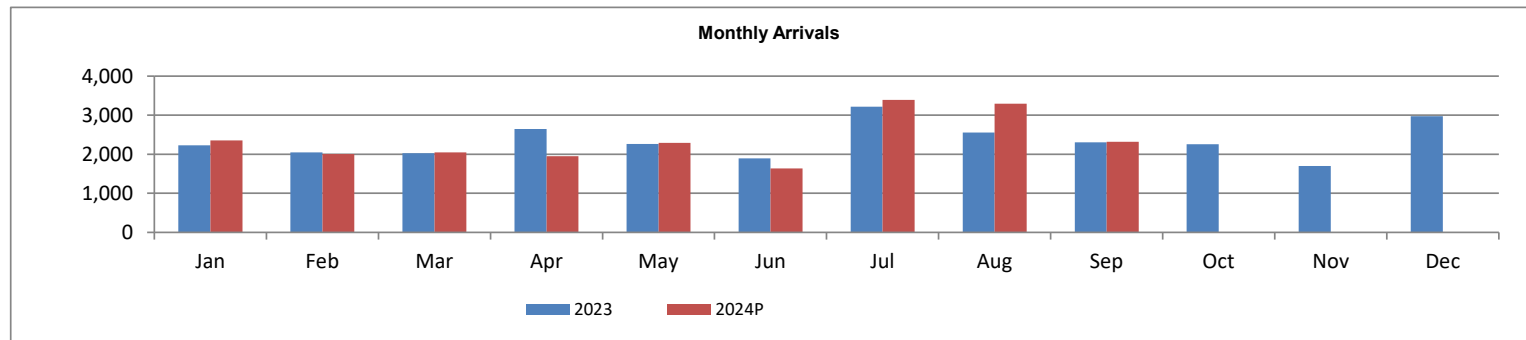
Key Performance Indicators

	YOY Rate	Sep'23 YTD	Sep'24P YTD	Annual Forecast*		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓	-19.9%	67.4	54.0	NA	O'ahu	1.9%	15,874
Daily Spend (\$PPPD)	↓	-19.3%	303.4	244.8	NA	Maui	-11.1%	6,062
Visitor Days	↘	-0.7%	222,194	220,543	NA	Moloka'i	-24.6%	78
Arrivals	↘	0.5%	21,187	21,283	NA	Lāna'i	-69.0%	111
Daily Census	↘	-1.1%	814	805	NA	Kaua'i	-4.6%	2,513
Airlift (scheduled seats) <sup>^</sup>		N/A	N/A	N/A	N/A	Hawai'i Island	0.1%	4,508

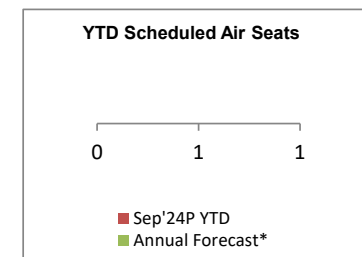
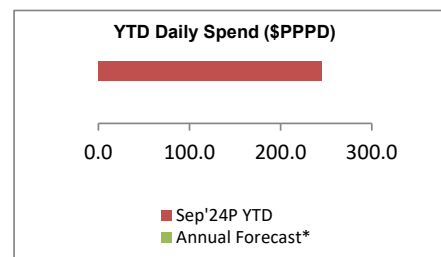
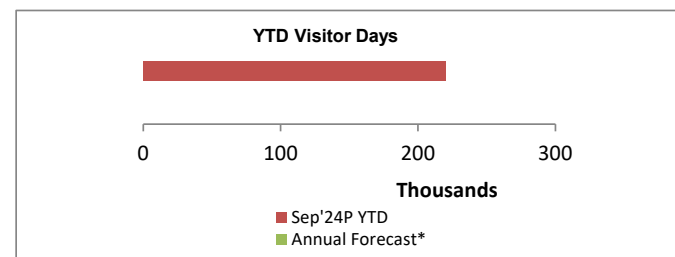
\* DBEDT Annual Forecast as of Q3 2024.

<sup>^</sup> DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

**10**

**Dashboard with 2019  
September 2024**

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

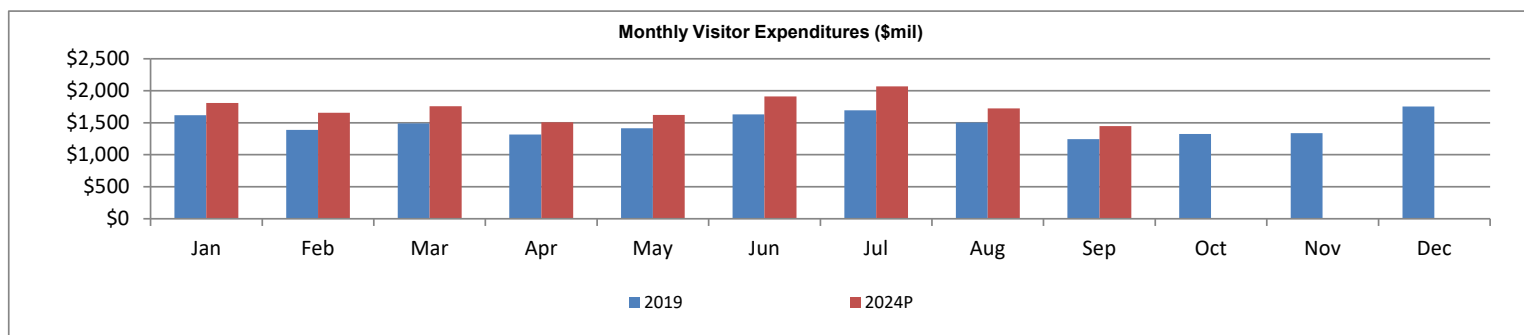
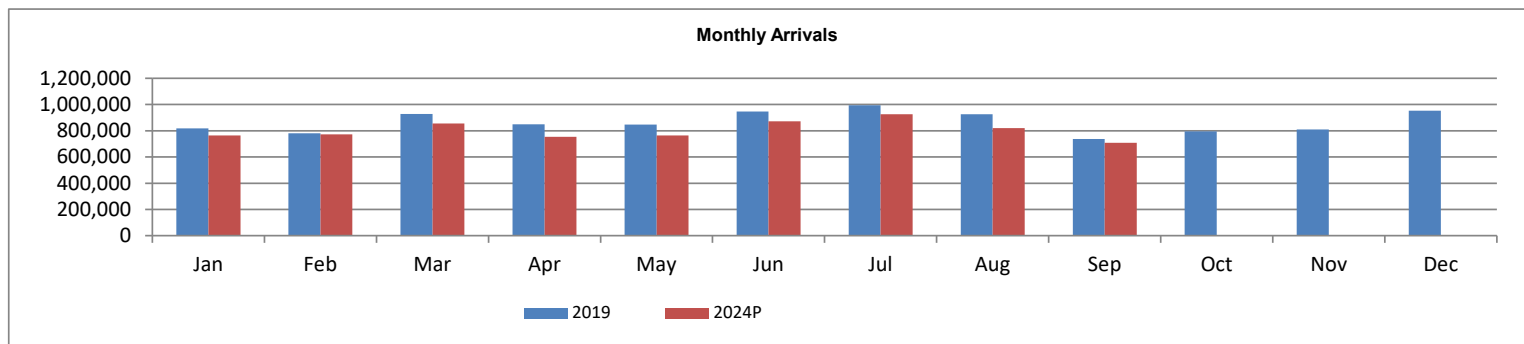
Market: **OVERALL**

Key Performance Indicators

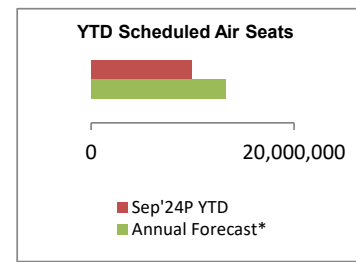
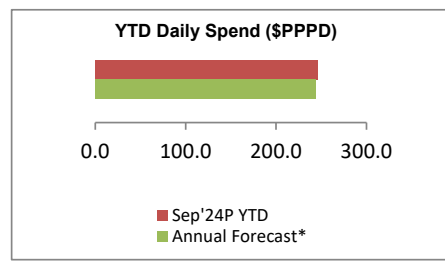
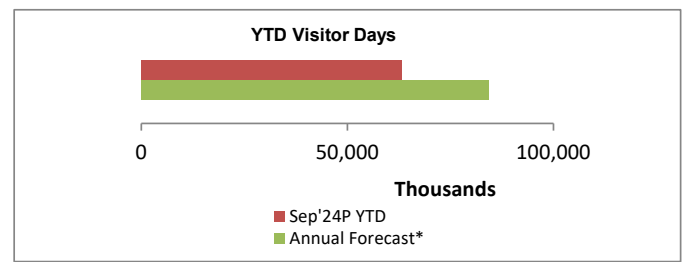
	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↑ 16.6%	13,302.1	15,504.7	20,593.7	O'ahu	-6.2%	4,366,790
Daily Spend (\$PPPD)	↑ 25.8%	195.2	245.7	244.0	Maui	-24.8%	1,739,257
Visitor Days	↓ -7.4%	68,147,048	63,116,487	84,392,803	Moloka'i	-50.1%	23,991
Arrivals	↓ -7.6%	7,828,965	7,233,501	9,564,557	Lāna'i	-45.9%	35,296
Daily Census	↓ -7.7%	249,623	230,352	230,581	Kaua'i	-0.2%	1,036,739
Airlift (scheduled seats) <sup>^</sup>	↓ -2.0%	10,160,180	9,952,664	13,251,219	Hawai'i Island	-2.0%	1,298,088

\* DBEDT Annual Forecast as of Q3 2024.  
DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures



HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **U.S. TOTAL**

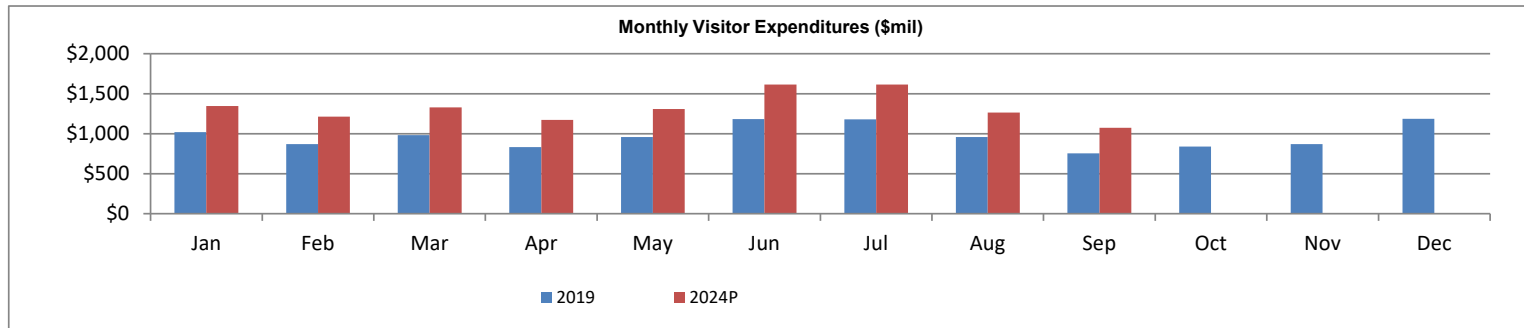
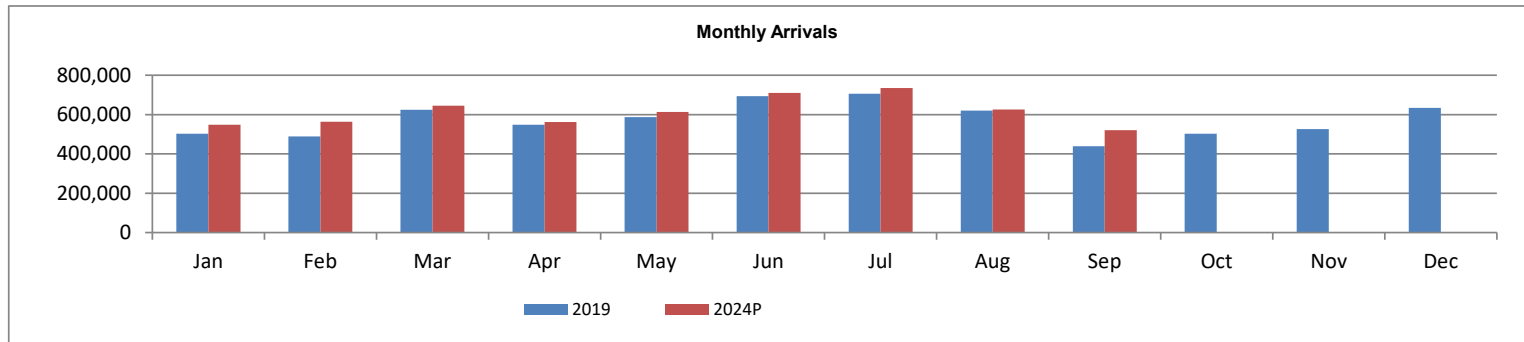
Key Performance Indicators

	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↑ 36.5%	8,739.8	11,934.0	15,794.7	O'ahu	18.7%	2,997,759
Daily Spend (\$PPPD)	↑ 31.3%	187.1	245.7	244.2	Maui	-20.0%	1,484,731
Visitor Days	↔ 4.0%	46,717,448	48,570,600	64,673,205	Moloka'i	-45.6%	17,488
Arrivals	↔ 6.0%	5,210,250	5,523,201	7,268,850	Lāna'i	-40.5%	27,107
Daily Census	↔ 3.6%	171,126	177,265	176,703	Kaua'i	6.5%	918,533
Airlift (scheduled seats) <sup>^</sup>	↔ 8.6%	7,323,256	7,954,498	10,572,881	Hawai'i Island	13.2%	1,067,500

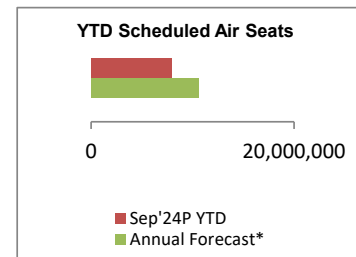
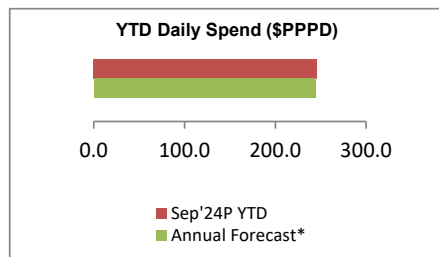
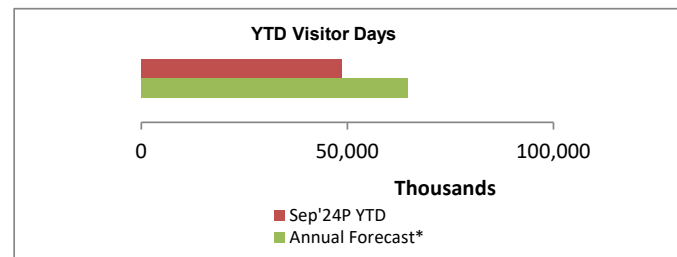
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DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **U.S. WEST**

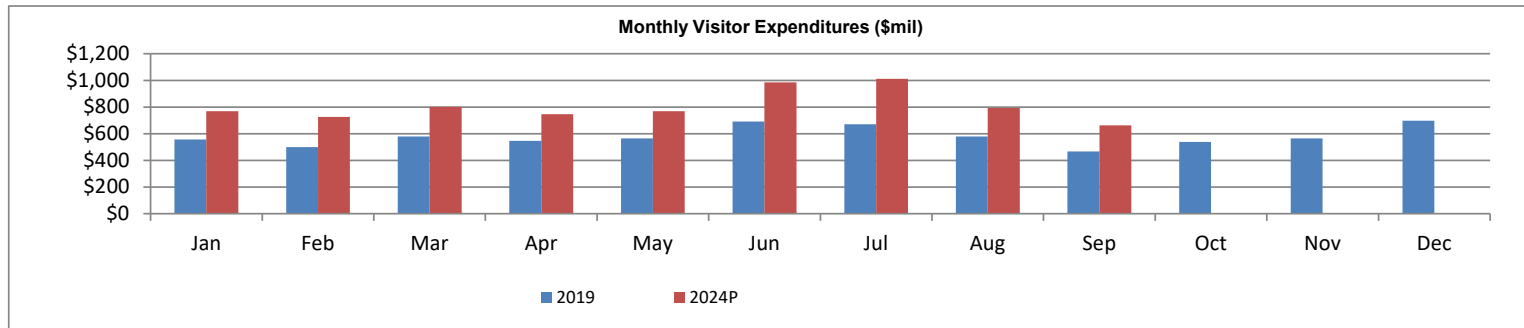
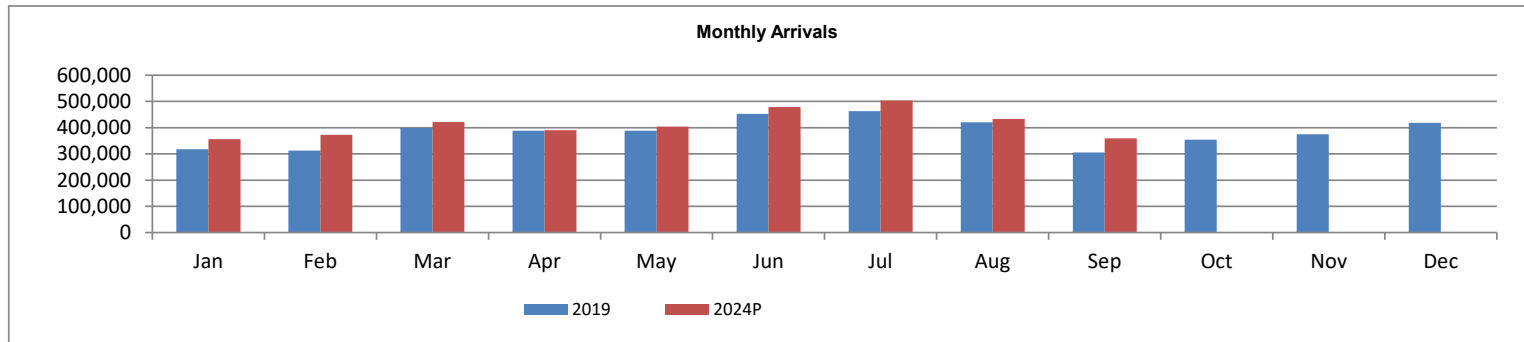
Key Performance Indicators

	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↑ 41.0%	5,151.9	7,262.1	9,606.9	O'ahu	25.0%	1,884,449
Daily Spend (\$PPPD)	↑ 34.4%	173.5	233.2	232.1	Maui	-20.0%	967,244
Visitor Days	↔ 4.9%	29,691,370	31,134,868	41,385,615	Moloka'i	-46.5%	10,284
Arrivals	↔ 7.9%	3,447,548	3,720,251	4,880,379	Lāna'i	-34.7%	15,156
Daily Census	↔ 4.5%	108,760	113,631	113,075	Kaua'i	8.1%	591,045
Airlift (scheduled seats) <sup>^</sup>	↑ 10.2%	6,413,400	7,065,838	9,377,384	Hawai'i Island	14.8%	669,868

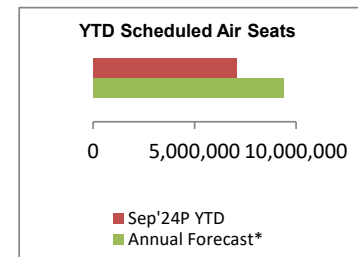
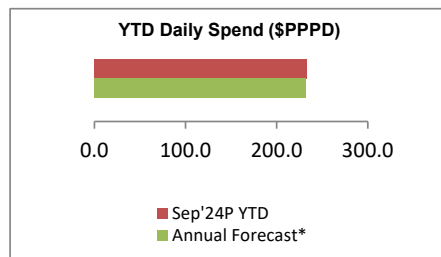
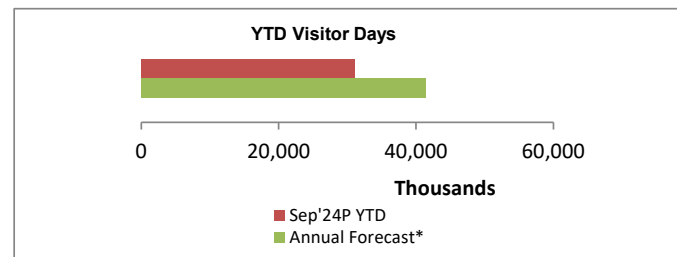
\* DBEDT Annual Forecast as of Q3 2024.

DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

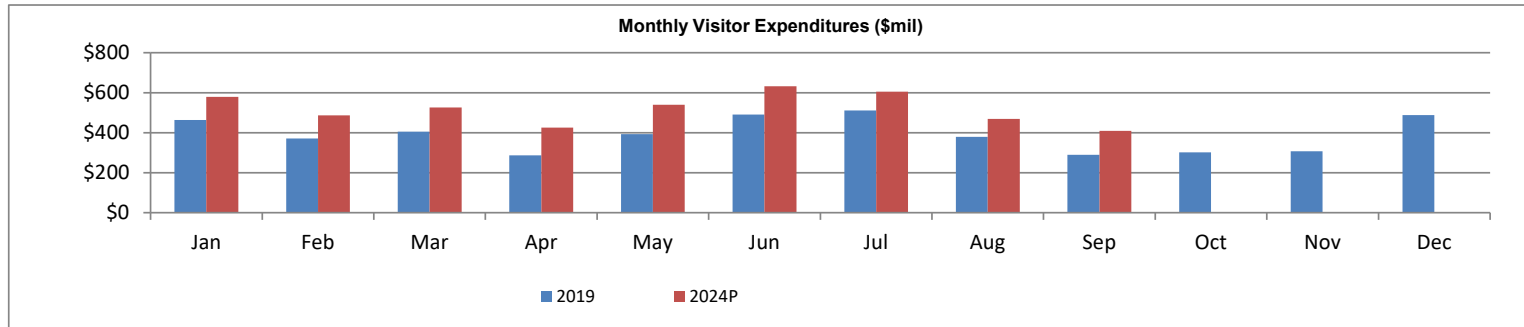
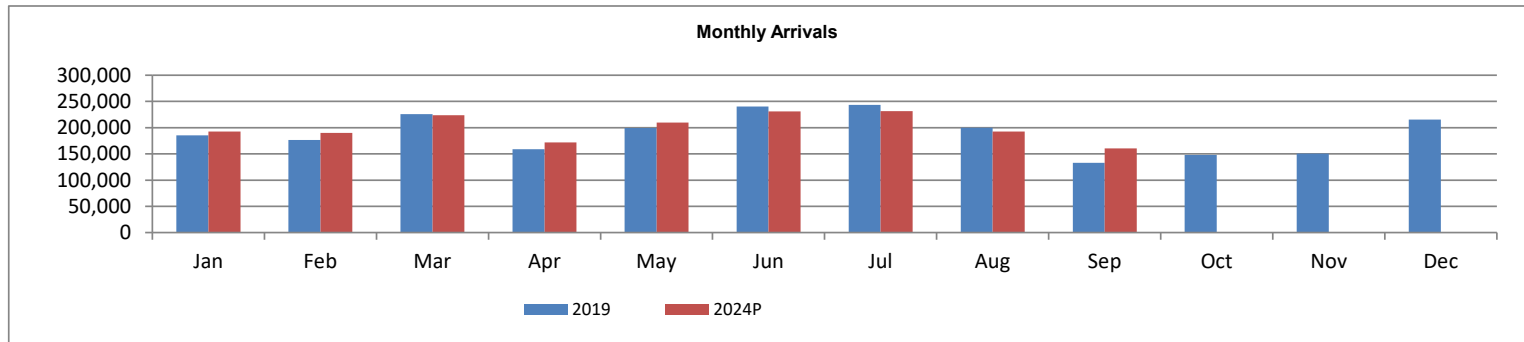
Market: **U.S. EAST**

Key Performance Indicators

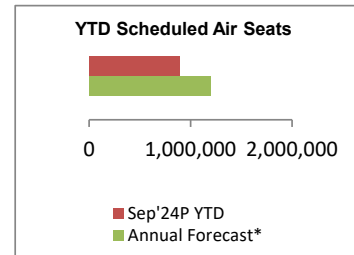
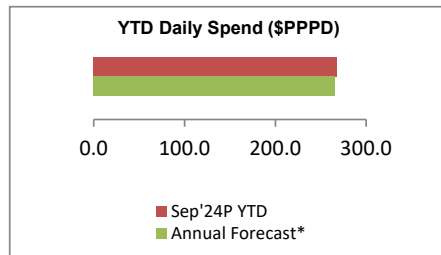
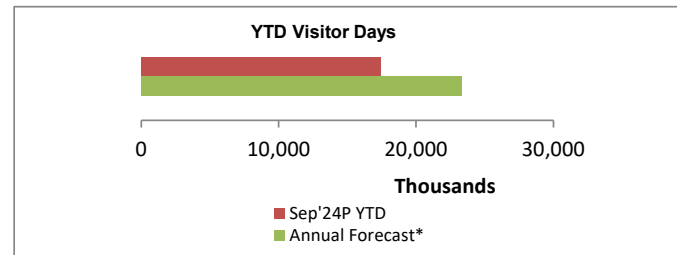
	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↑ 30.2%	3,587.9	4,671.9	6,187.8	O'ahu	9.3%	1,113,309
Daily Spend (\$PPPD)	↑ 27.2%	210.7	267.9	265.7	Maui	-20.0%	517,487
Visitor Days	↔ 2.4%	17,026,078	17,435,732	23,287,590	Moloka'i	-44.4%	7,204
Arrivals	↔ 2.3%	1,762,702	1,802,950	2,388,471	Lāna'i	-46.5%	11,951
Daily Census	↔ 2.0%	62,367	63,634	63,627	Kaua'i	3.9%	327,488
Airlift (scheduled seats) <sup>^</sup>	↓ -2.3%	909,856	888,660	1,195,497	Hawai'i Island	10.7%	397,632

\* DBEDT Annual Forecast as of Q3 2024.  
 DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **JAPAN**

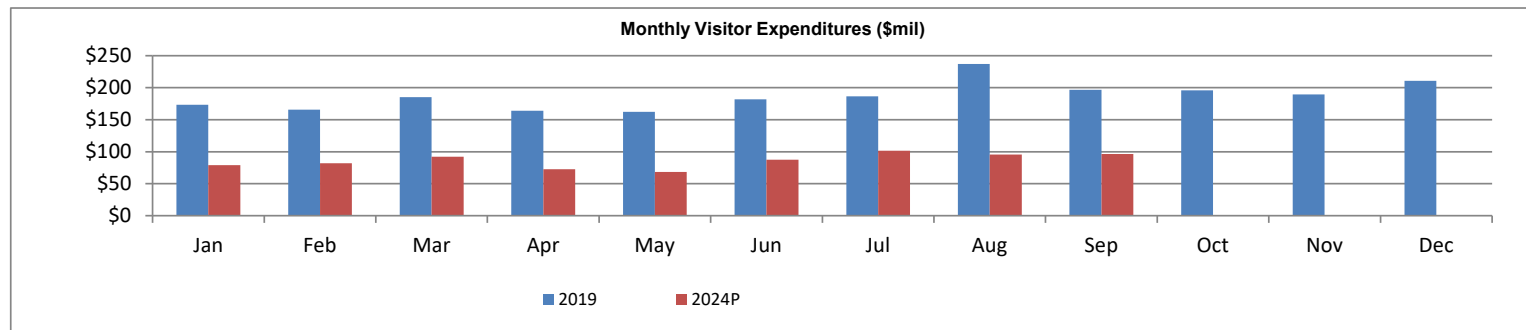
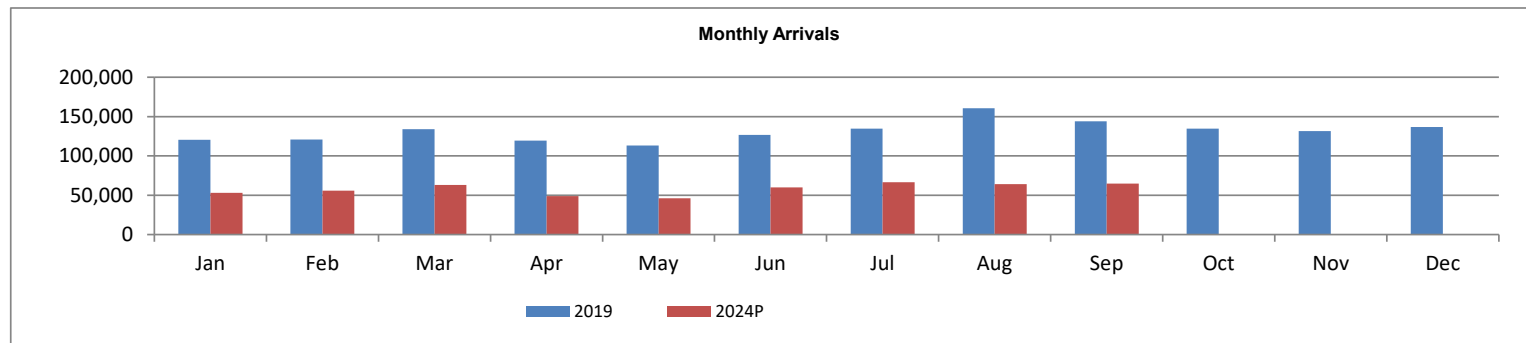
Key Performance Indicators

	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -53.1%	1,652.4	774.6	1,070.5	O'ahu	-54.1%	510,025
Daily Spend (\$PPPD)	↔ 0.4%	237.0	238.1	241.9	Mauī	-73.4%	9,830
Visitor Days	↓ -53.3%	6,971,475	3,253,593	4,424,958	Moloka'i	-56.8%	582
Arrivals	↓ -55.5%	1,173,477	522,021	717,173	Lāna'i	-80.4%	323
Daily Census	↓ -53.5%	25,537	11,874	12,090	Kaua'i	-73.4%	4,939
Airlift (scheduled seats) <sup>^</sup>	↓ -30.1%	1,498,414	1,047,728	1,384,543	Hawai'i Island	-70.5%	36,451

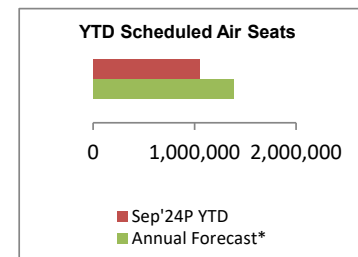
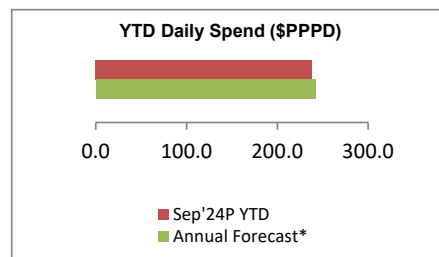
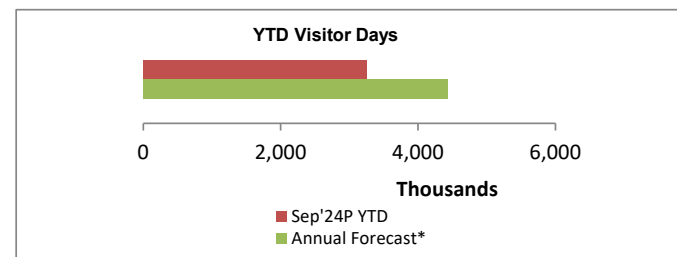
\* DBEDT Annual Forecast as of Q3 2024.

DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

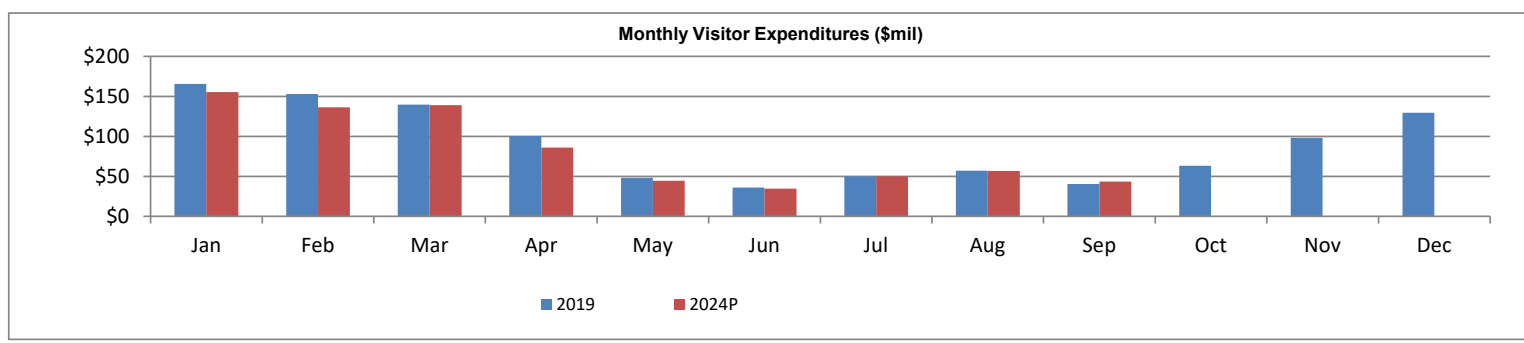
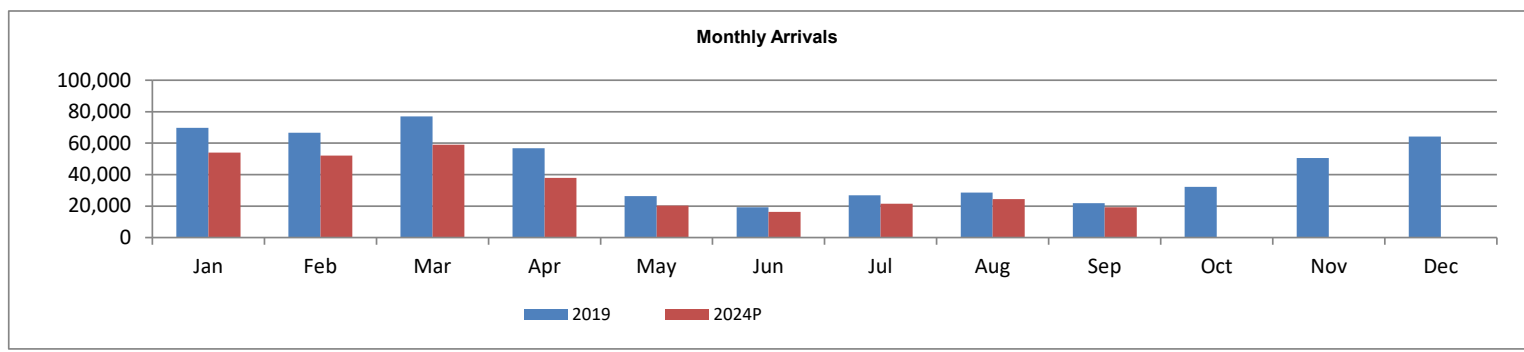
Market: **CANADA**

Key Performance Indicators

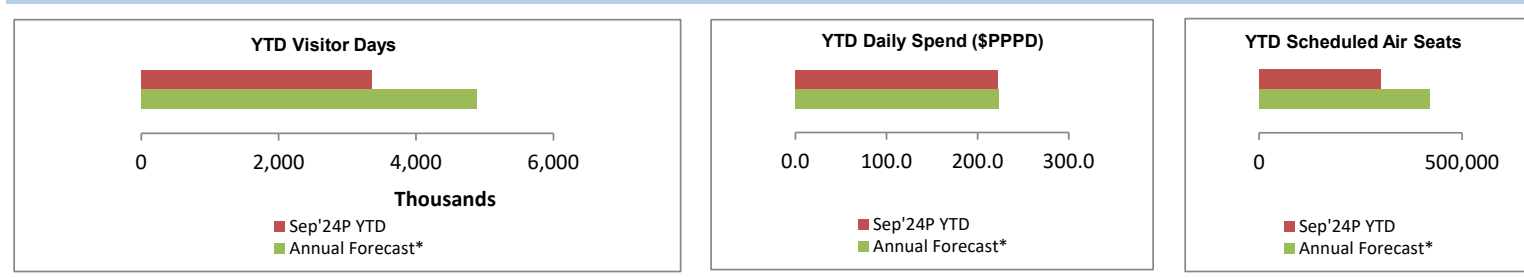
	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	👉 -5.7%	790.6	745.8	1,093.6	O'ahu	0.9%	173,937
Daily Spend (\$PPPD)	👈 33.8%	165.9	222.0	223.7	Maui	-42.9%	112,897
Visitor Days	👇 -29.5%	4,764,961	3,358,907	4,887,902	Moloka'i	-52.7%	1,715
Arrivals	👇 -22.4%	393,074	305,029	432,558	Lāna'i	-66.1%	1,497
Daily Census	👇 -29.8%	17,454	12,259	13,355	Kaua'i	-42.6%	31,986
Airlift (scheduled seats) <sup>^</sup>	👇 -16.4%	356,885	298,186	420,129	Hawai'i Island	-25.4%	51,956

\* DBEDT Annual Forecast as of Q3 2024.  
DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **OCEANIA**

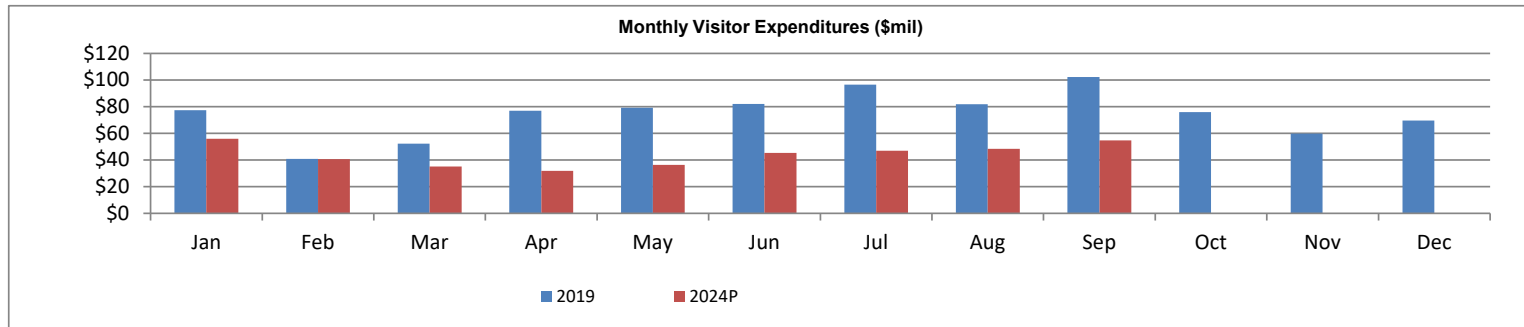
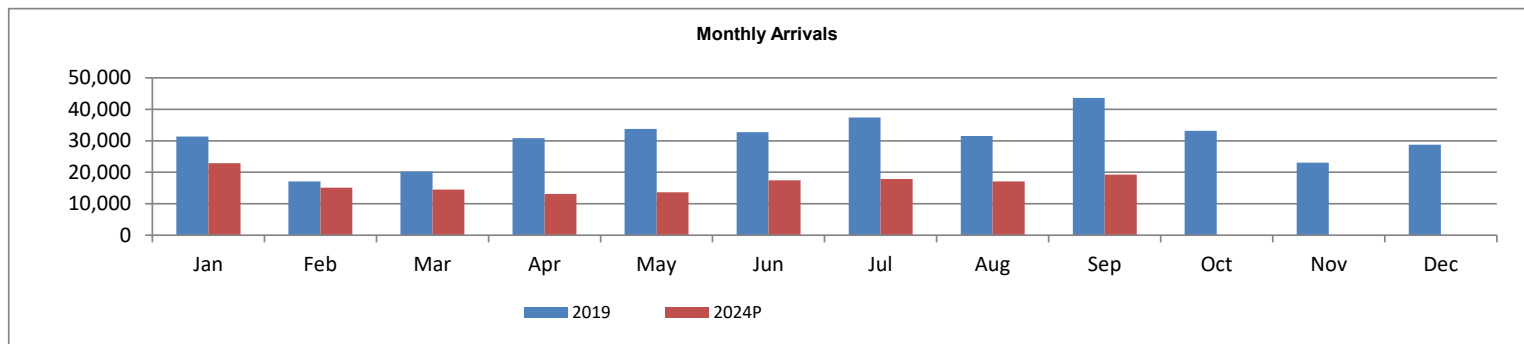
Key Performance Indicators

	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -42.7%	689.7	395.5	545.8	O'ahu	-45.8%	147,873
Daily Spend (\$PPPD)	↑ 13.2%	262.4	297.1	297.1	Maui	-68.2%	15,332
Visitor Days	↓ -49.3%	2,628,085	1,331,287	1,837,054	Moloka'i	-64.2%	1,400
Arrivals	↓ -45.8%	278,530	151,016	208,756	Lāna'i	-70.4%	1,512
Daily Census	↓ -49.5%	9,627	4,859	5,019	Kaua'i	-54.9%	11,634
Airlift (scheduled seats) <sup>^</sup>	↓ -41.7%	376,768	219,561	295,296	Hawai'i Island	-54.7%	16,240

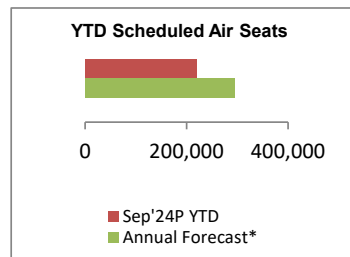
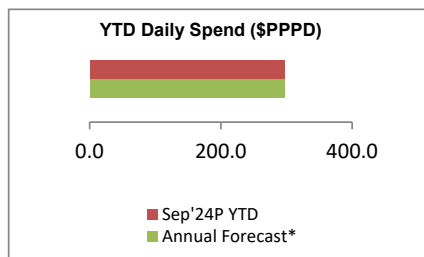
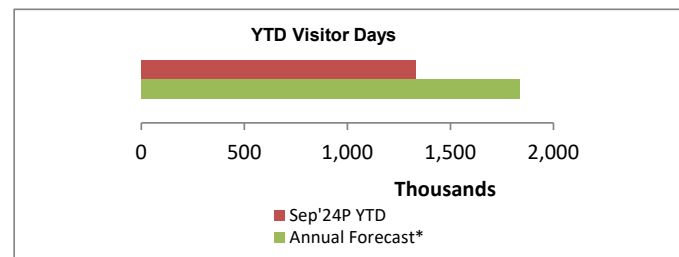
\* DBEDT Annual Forecast as of Q3 2024.

DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **OTHER ASIA**

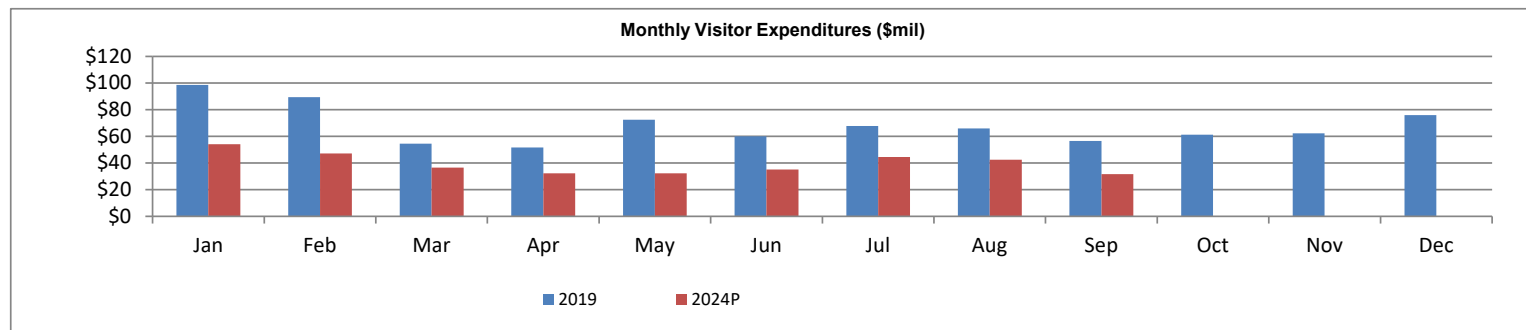
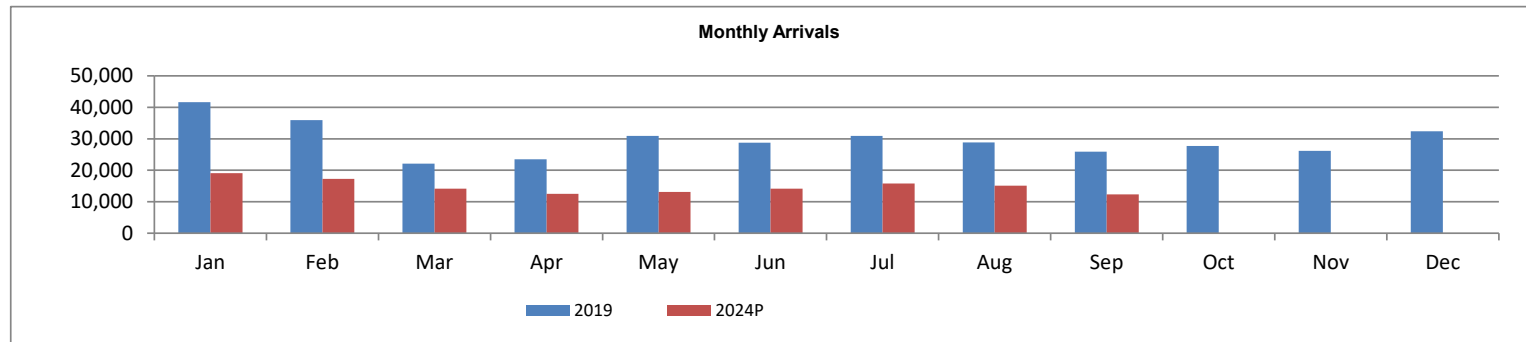
Key Performance Indicators

	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -42.3%	617.2	356.2	NA		O'ahu	-50.9%	128,523
Daily Spend (\$PPPD)	↑ 10.4%	287.9	318.0	NA		Mauī	-82.6%	7,419
Visitor Days	↓ -47.8%	2,143,962	1,120,180	NA		Moloka'i	-72.4%	314
Arrivals	↓ -50.3%	268,393	133,471	NA		Lāna'i	-77.3%	309
Daily Census	↓ -47.9%	7,853	4,088	NA		Kaua'i	-50.4%	4,809
Airlift (scheduled seats) <sup>^</sup>	↓ -41.9%	368,085	213,694	278,957		Hawai'i Island	-51.9%	26,458

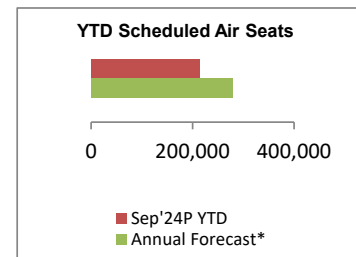
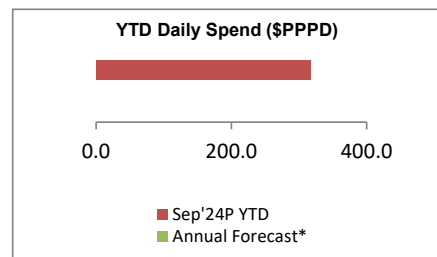
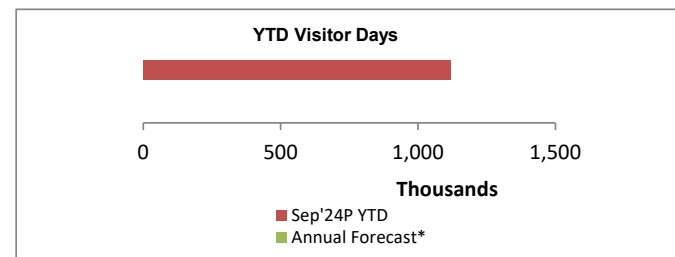
\* DBEDT Annual Forecast as of Q3 2024.

DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **KOREA**

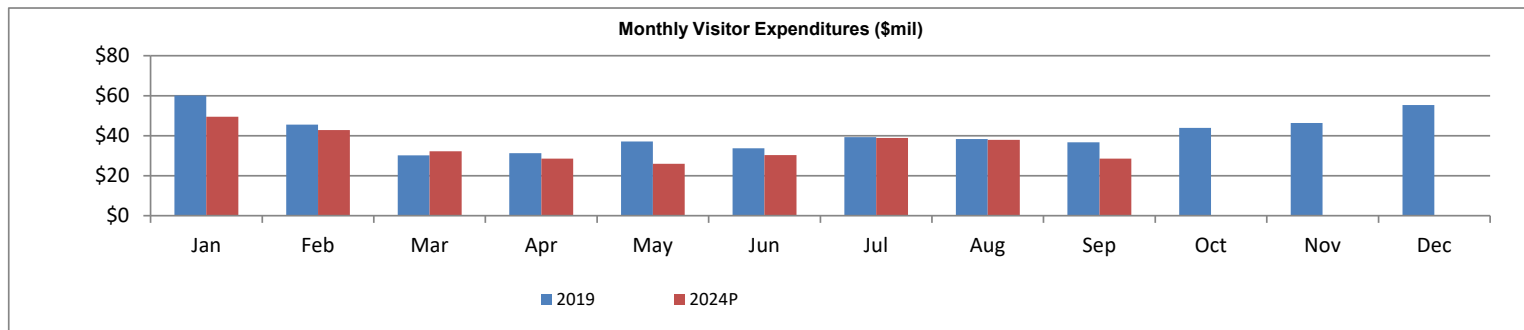
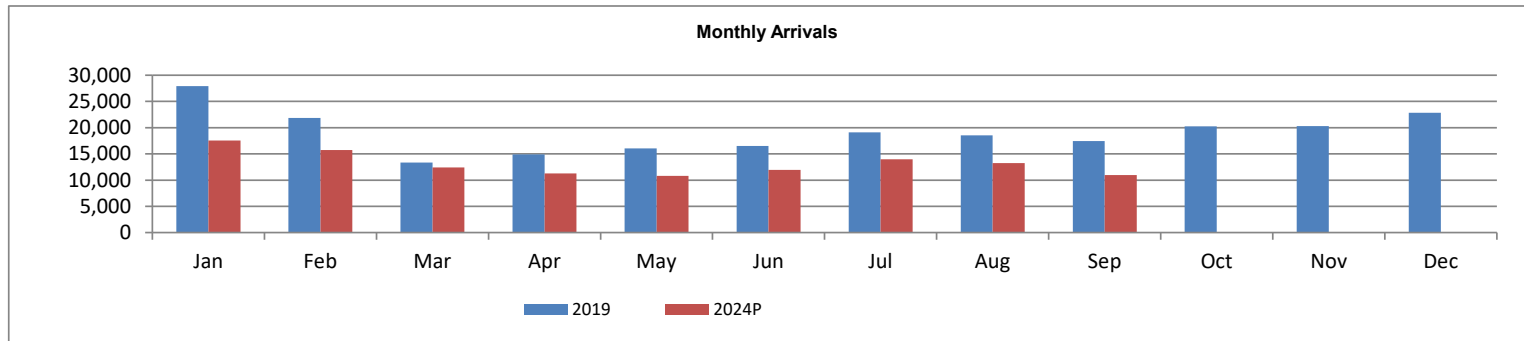
Key Performance Indicators

	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -10.6%	352.2	314.8	440.7	O'ahu	-29.1%	115,618
Daily Spend (\$PPPD)	↑ 15.5%	272.3	314.4	319.6	Maui	-76.0%	5,126
Visitor Days	↓ -22.6%	1,293,565	1,001,220	1,378,778	Moloka'i	-44.9%	261
Arrivals	↓ -28.8%	165,690	117,927	162,209	Lāna'i	-62.9%	171
Daily Census	↓ -22.9%	4,738	3,654	3,767	Kaua'i	-30.4%	3,692
Airlift (scheduled seats) <sup>^</sup>	↓ -12.4%	244,014	213,694	278,957	Hawai'i Island	11.5%	22,468

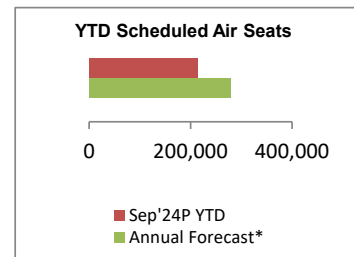
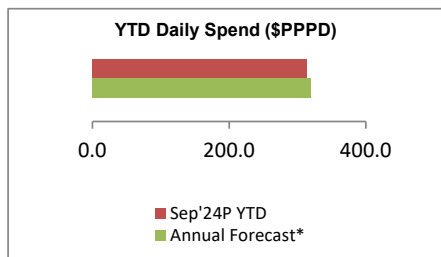
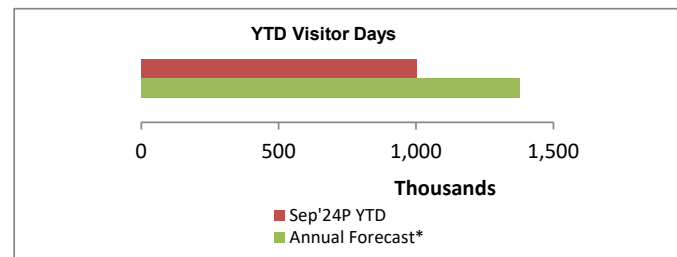
\* DBEDT Annual Forecast as of Q3 2024.

DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures



HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

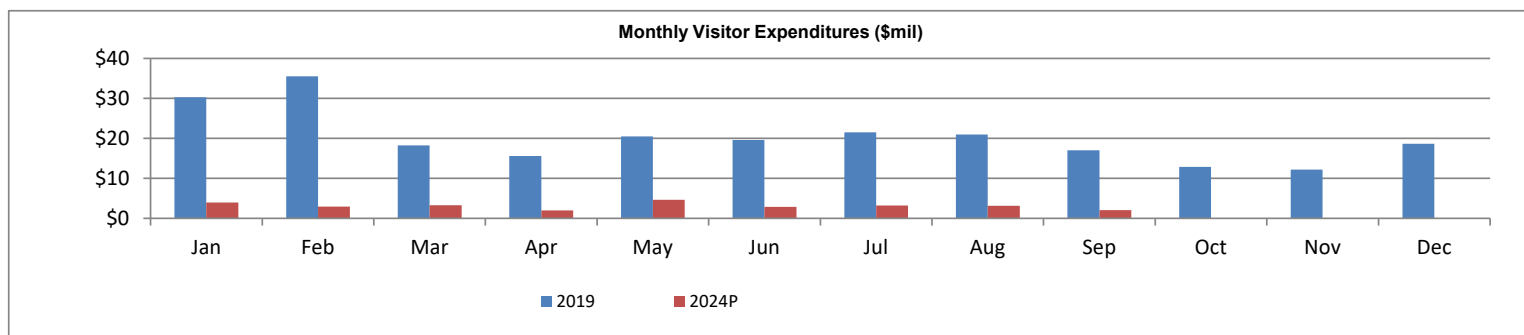
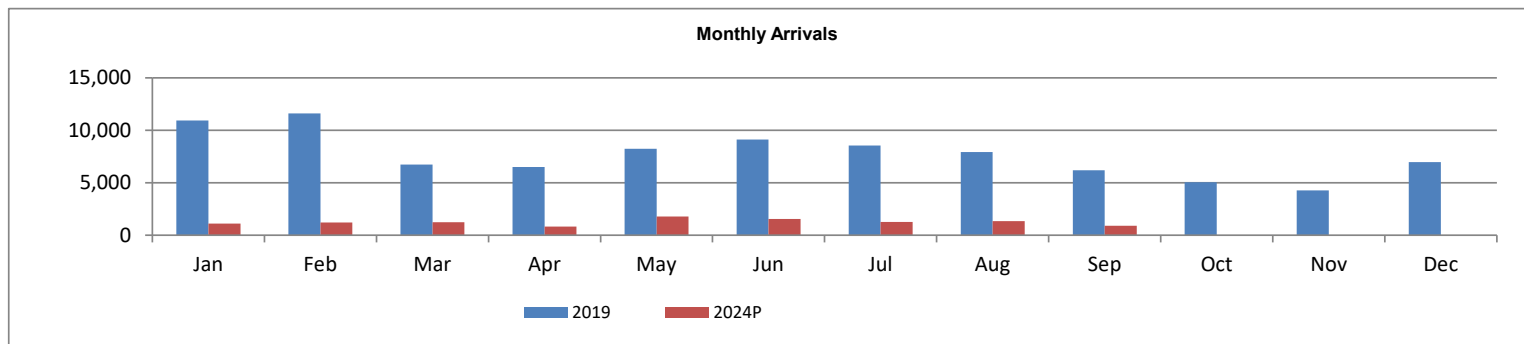
Market: **CHINA**

Key Performance Indicators

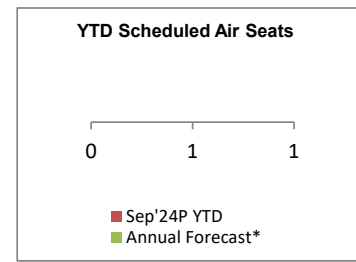
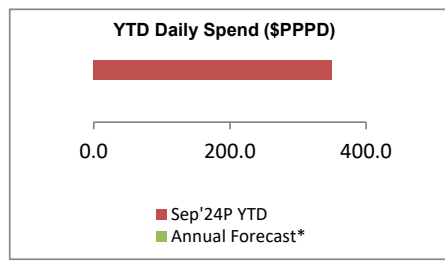
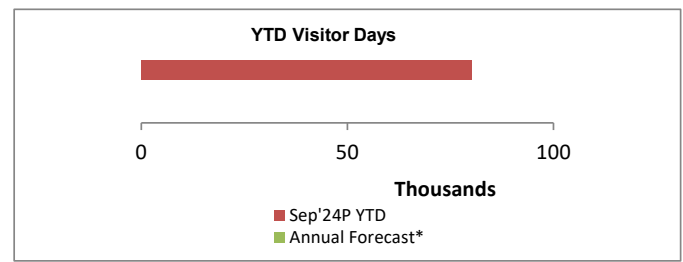
	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -85.9%	199.1	28.0	NA		O'ahu	-86.7%	9,721
Daily Spend (\$PPPD)	↗ 7.3%	326.2	349.9	NA		Maui	-91.1%	1,451
Visitor Days	↓ -86.9%	610,356	80,086	NA		Moloka'i	-94.2%	35
Arrivals	↓ -85.3%	75,805	11,170	NA		Lāna'i	-85.3%	108
Daily Census	↓ -86.9%	2,236	292	NA		Kaua'i	-78.5%	660
Airlift (scheduled seats) <sup>^</sup>	N/A	93,471	N/A	N/A		Hawai'i Island	-89.3%	3,085

\* DBEDT Annual Forecast as of Q3 2024.  
DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

Market: **EUROPE**

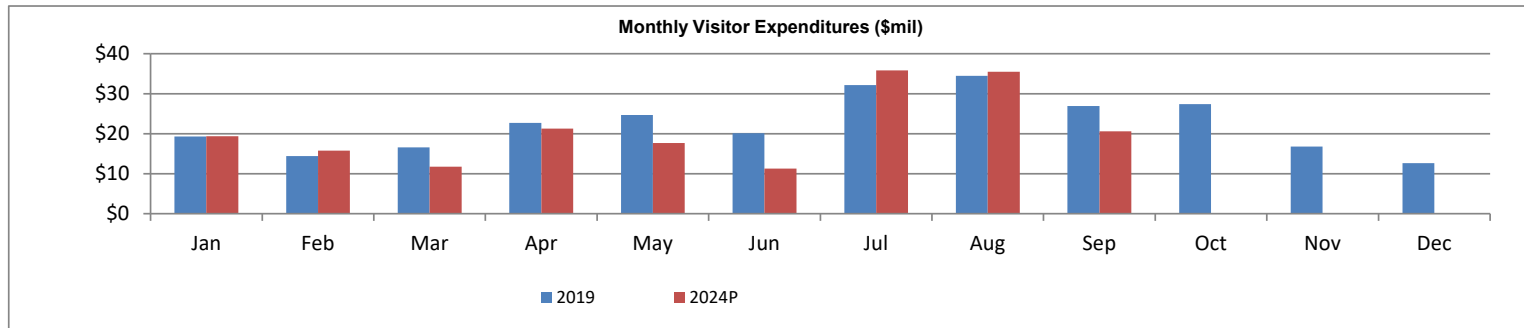
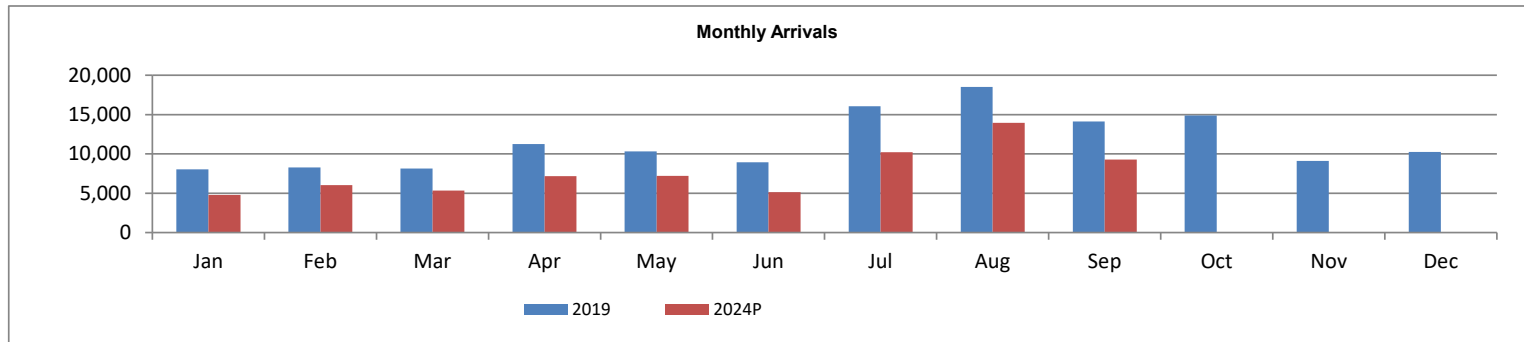
Key Performance Indicators

	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↓ -10.5%	211.3	189.0	261.9	O'ahu	-30.0%	54,158
Daily Spend (\$PPPD)	↑ 33.0%	157.6	209.5	227.5	Maui	-50.8%	22,890
Visitor Days	↓ -32.7%	1,341,011	902,170	1,150,933	Moloka'i	-65.2%	459
Arrivals	↓ -33.4%	103,667	69,088	85,571	Lāna'i	-76.3%	327
Daily Census	↓ -33.0%	4,912	3,293	3,145	Kaua'i	-35.4%	17,077
Airlift (scheduled seats) <sup>^</sup>	N/A	N/A	N/A	N/A	Hawai'i Island	-32.6%	21,534

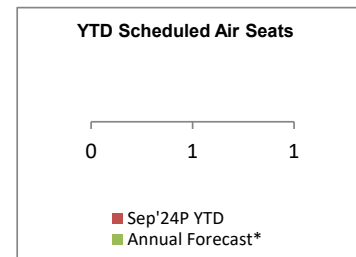
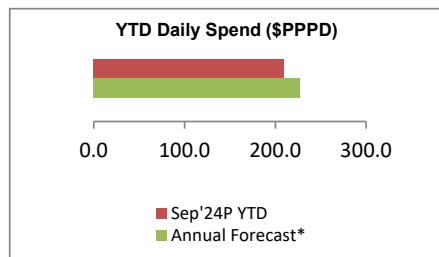
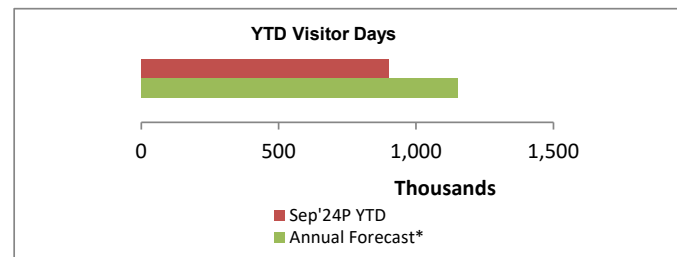
\* DBEDT Annual Forecast as of Q3 2024.

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Monthly Indicators



Annual Indicators



\* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

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

Visitor Industry Performance Measures

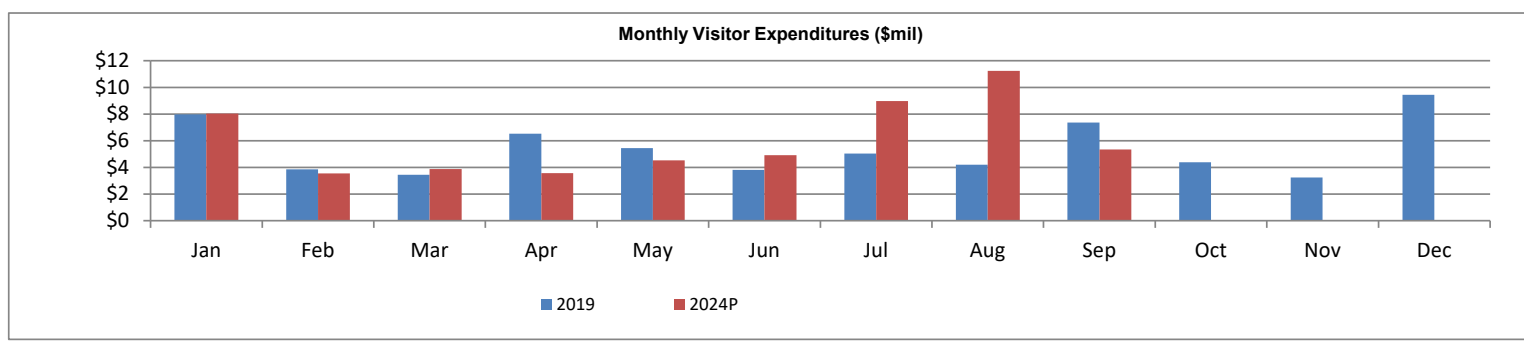
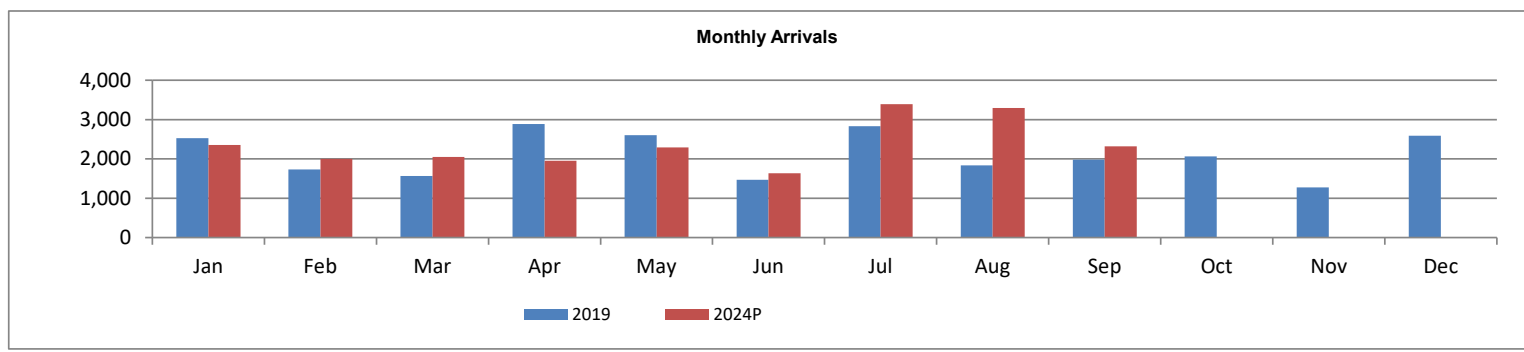
Market: **LATIN AMERICA**

Key Performance Indicators

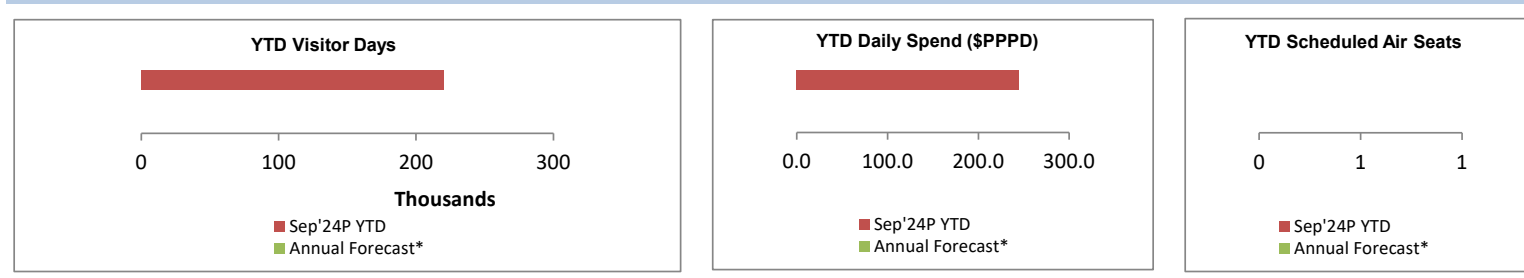
	YOY Rate	Sep'19 YTD	Sep'24P YTD	Annual Forecast*		Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	↑ 13.3%	47.6	54.0	NA		O'ahu	7.2%	15,874
Daily Spend (\$PPPD)	↔ 5.4%	232.2	244.8	NA		Maui	-8.7%	6,062
Visitor Days	↔ 7.5%	205,158	220,543	NA		Moloka'i	-46.6%	78
Arrivals	↔ 9.6%	19,422	21,283	NA		Lāna'i	-72.0%	111
Daily Census	↔ 7.1%	751	805	NA		Kaua'i	-0.5%	2,513
Airlift (scheduled seats) <sup>^</sup>	N/A	N/A	N/A	N/A		Hawai'i Island	16.1%	4,508

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 DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 22, 2024, subject to change.

Monthly Indicators



Annual Indicators



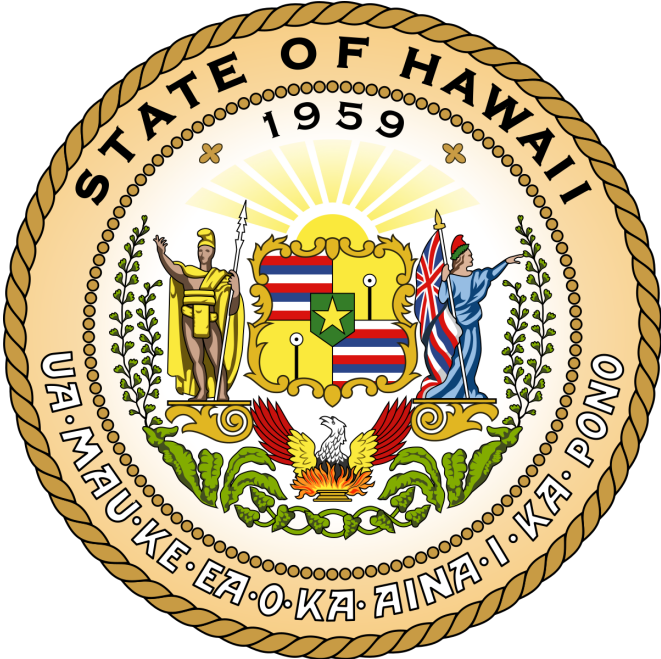
\* Excludes Supplemental Business Expenditures

**11**

**Report and Update by the  
BUDGET, FINANCE, AND CONVENTION CENTER  
STANDING COMMITTEE**

## **11a**

**Presentation, Motion, Discussion, and Action  
on the HTA's September and October 2024  
Financial Report; Recommend Approval**



# Fiscal Year 2025 Tourism Budget

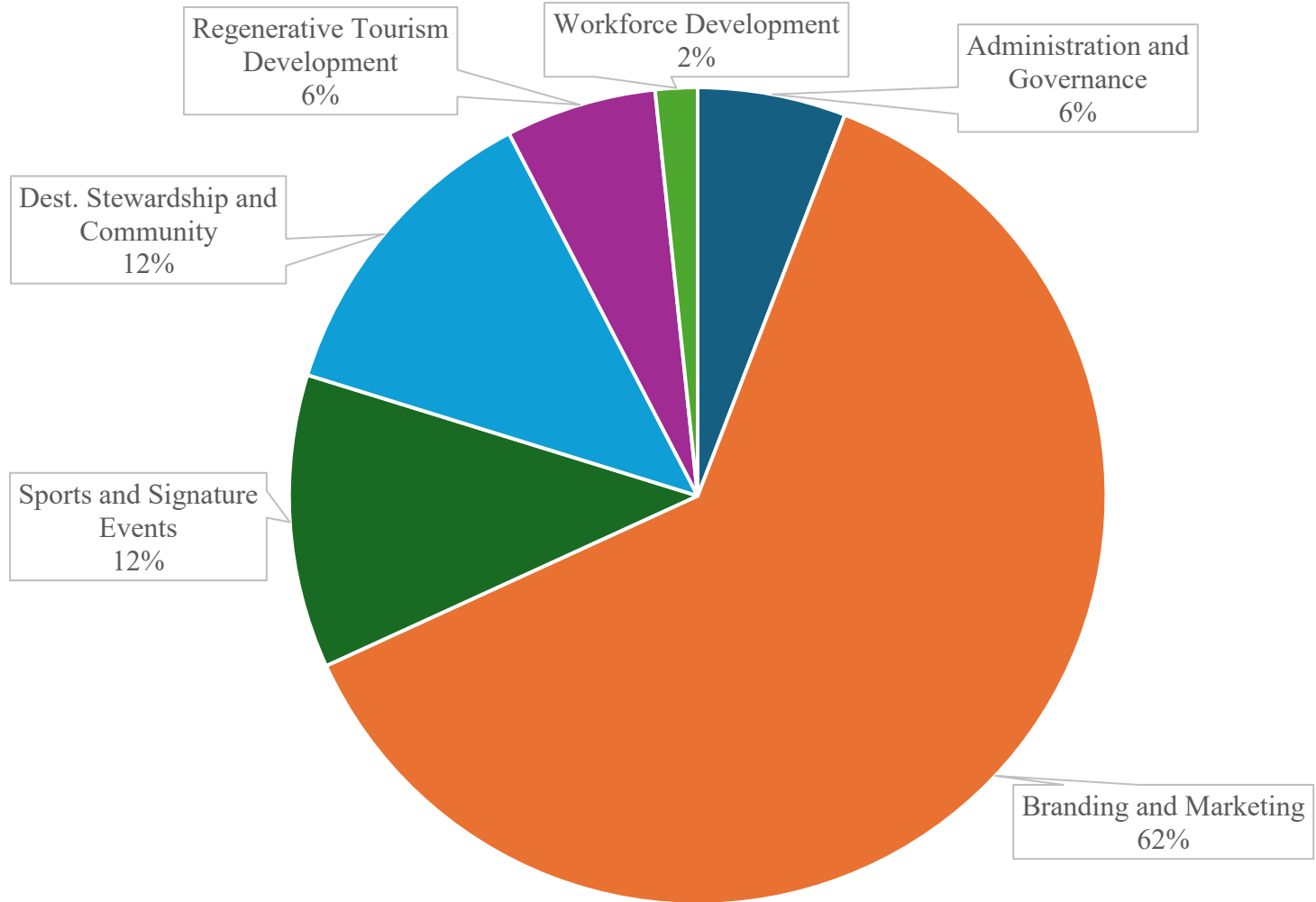
For the Period July 1, 2024 to October 31, 2024

# Fiscal Year 2025 Tourism Budget For the Period July 1, 2024 to October 31, 2024

Program Title and ID	Program ID	Paid To Date	Remaining Encumbrance To Date	Budget Restriction	Actual (Paid + Encumbrance + Restriction)	Fiscal Year 2025 Budget	Budget vs. Actual
Administration and Governance	BED113	717,445	340,328	369,666	1,427,439	3,696,660	2,269,221
Branding and Marketing	BED114	5,806,688	2,939,032	3,924,920	12,670,640	39,249,201	26,578,561
Sports and Signature Events	BED115	0	750,000	731,808	1,481,808	7,318,075	5,836,267
Destination Stewardship and Community	BED116	46,536	212,706	792,388	1,051,630	7,923,883	6,872,253
Regenerative Tourism Development	BED117	46,831	794,901	376,218	1,217,950	3,762,181	2,544,231
Workforce Development	BED118	180,327	48,000	105,000	333,327	1,050,000	716,673
<b>Total</b>		<b>6,797,827</b>	<b>5,084,967</b>	<b>6,300,000</b>	<b>18,182,794</b>	<b>63,000,000</b>	<b>44,817,206</b>

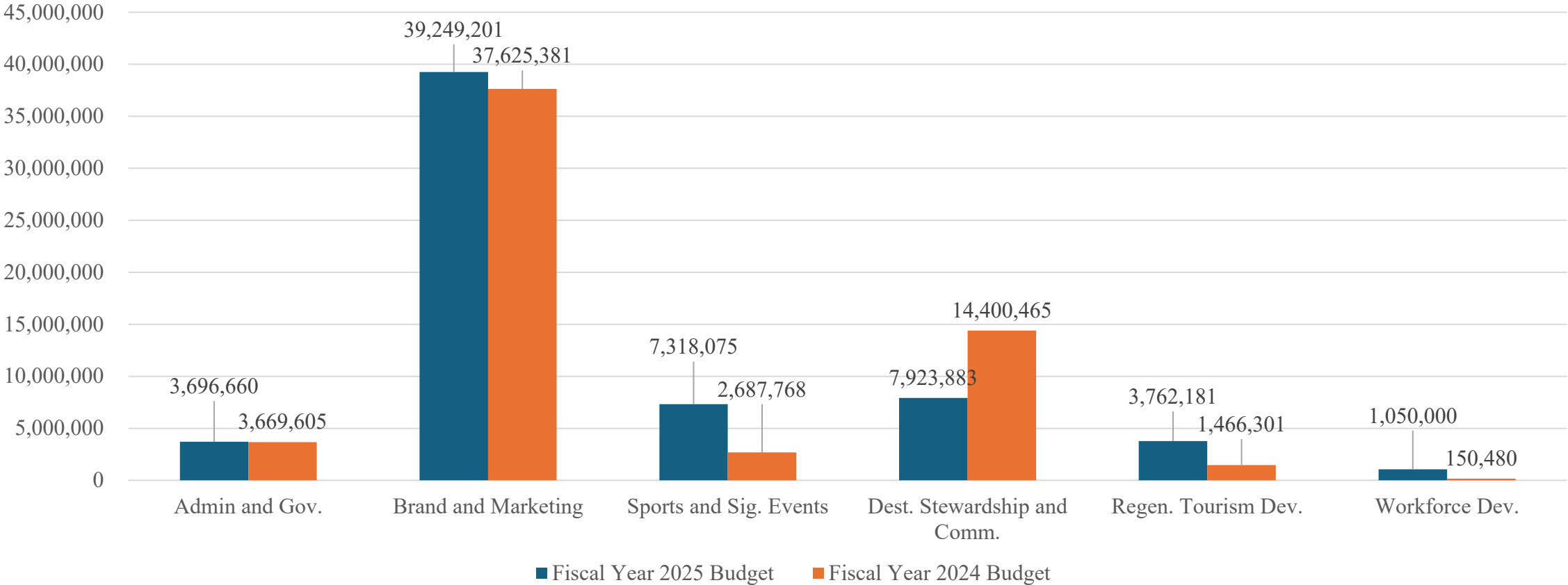


# Fiscal Year 2025 Tourism Budget



- Administration and Governance
- Branding and Marketing
- Sports and Signature Events
- Dest. Stewardship and Community
- Regenerative Tourism Development
- Workforce Development

# Fiscal Year 2025 vs. Fiscal Year 2024 HTA Operating Budget



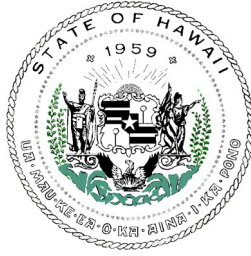
# Other Funds

# Tourism Funds

- Fiscal Year 2024 Tourism General Funds
  - Year to Date Expenditures = \$7,161,867
  - Funds = \$1,078,947
  - Encumbrances = \$1,078,947
- Tourism Special Fund
  - Year to Date Expenditures = \$107,334
  - Cash balance = \$8,348,482
  - Encumbrances = \$852,025
- Tourism Emergency Special Fund
  - Year to Date Expenditures = \$105,319
  - \$282,749 of \$5,000,000 remaining from Maui Disaster Response Plan #1
  - \$130,000 of \$130,000 remaining from Maui Disaster Response Plan #2
- EDA-ARPA State Tourism Grant
  - Year to Date Expenditures = \$2,780,000
  - Funds = \$8,776,717
  - Encumbrances = \$5,720,345

# Convention Center Funds

- Fiscal Year 2024 Convention Center General Funds
  - Funds = \$2,078,262
  - Encumbrances = \$2,078,262
- Convention Center Enterprise Special Fund
  - Year to Date Revenue = \$11,455,316
  - Cash balance = \$59,210,005
  - \$34,000,000 reserved for Fiscal Year 2025 operations
  - \$11,000,000 reserved for transfer to B&F (for fiscal year 2024 HCC operations)
- Rooftop Repair Project
  - Act 248, SLH 2022 appropriated \$15,000,000 for the rooftop terrace deck repair project:
    - Year to Expenditures = \$149,754
    - Funds = \$14,422,634
    - Encumbrances = \$14,422,634
  - \$64,000,000 appropriated by Act 230, SLH 2024.
    - As of 11/18/24, allotment is pending release by the Governor.



**The State of Hawai`i**  
**Department of Business, Economic Development, and Tourism**  
**Hawai`i Tourism Authority**  
**Financial Statements**  
**October 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 TOURISMAUTHORITY

Hawaii Tourism Authority  
October 31, 2024  
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**Hawaii Tourism Authority**  
**Balance Sheet**  
**As of October 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>						
Fiscal Year (FY) 2025 General Funds	56,202,173	-	-	-	-	56,202,173
FY 2024 General Funds	1,078,947	2,078,262	-	-	-	3,157,209
Special Funds (restricted)	8,348,482	59,210,005	-	-	-	67,558,487
Federal Grants	-	-	-	-	8,776,717	8,776,717
General Obligation Bonds (GOB)	-	-	14,422,634	-	-	14,422,634
Cash and Cash Equivalents	-	-	-	669,893	-	669,893
Total Assets	<u>65,629,602</u>	<u>61,288,267</u>	<u>14,422,634</u>	<u>669,893</u>	<u>8,776,717</u>	<u>150,787,113</u>
<b>Liabilities and Fund Balances</b>						
<b>Liabilities</b>						
Transfer due to B&F*	-	11,000,000	-	-	-	11,000,000
Total liabilities	-	<u>11,000,000</u>	-	-	-	<u>11,000,000</u>
<b>Fund Balances</b>						
FY 2025 Encumbered - General Funds	5,084,967	2,078,262	-	-	-	7,163,229
FY 2024 Encumbered - General Funds	1,078,947	-	-	-	-	1,078,947
Unencumbered - General Funds	51,117,206	-	-	-	-	51,117,206
Total General Fund Balances	<u>57,281,120</u>	<u>2,078,262</u>	-	-	-	<u>59,359,382</u>
Encumbered - Special Funds	852,025	525,999	-	289,163	5,720,345	7,387,532
Unencumbered - Special Funds	7,496,457	47,684,006	-	380,730	3,056,372	58,617,565
Total Special Fund Balances	<u>8,348,482</u>	<u>48,210,005</u>	-	<u>669,893</u>	<u>8,776,717</u>	<u>66,005,097</u>
Encumbered - GOB	-	-	14,422,634	-	-	14,422,634
Unencumbered - GOB	-	-	-	-	-	-
Total GOB Fund Balance	-	-	<u>14,422,634</u>	-	-	<u>14,422,634</u>
Total Fund Balances	<u>65,629,602</u>	<u>50,288,267</u>	<u>14,422,634</u>	<u>669,893</u>	<u>8,776,717</u>	<u>139,787,113</u>
Total Liabilities and Fund Balances	<u>65,629,602</u>	<u>61,288,267</u>	<u>14,422,634</u>	<u>669,893</u>	<u>8,776,717</u>	<u>150,787,113</u>

\* 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**  
**October 31, 2024**

	Paid Two Month Period Ended October 31, 2024	Actual			FY 25 Budget	Budget vs. Actual
		Paid Year to Date	Remaining Encumbrances	Budget Restriction		Under (Over) Budget
<b>Revenues</b>						
Refunds	-	-	-	-	-	-
Total	-	-	-	-	-	-
<b>Expenditures</b>						
Administration and Governance	477,593	717,445	340,328	369,666	3,696,660	2,269,221
Branding and Marketing	5,770,753	5,806,688	2,939,032	3,924,920	39,249,201	26,578,561
Sports and Signature Events	-	-	750,000	731,808	7,318,075	5,836,267
Dest. Stewardship and Community	24,986	46,536	212,706	792,388	7,923,883	6,872,253
Regenerative Tourism Development	20,663	46,831	794,901	376,218	3,762,181	2,544,231
Workforce Development	180,327	180,327	48,000	105,000	1,050,000	716,673
Total	6,474,322	6,797,827	5,084,967	6,300,000	63,000,000	44,817,206
Change in Fund Balance	(6,474,322)	(6,797,827)				
<b>Fund Balances</b>						
September 1, 2024 / July 1, 2024	62,676,495	63,000,000				
October 31, 2024	56,202,173	56,202,173				

\* 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**  
**October 31, 2024**

	<b>Paid Two Month Period Ended October 31, 2024</b>	<b>Paid Year to Date</b>	<b>Remaining Encumbrances</b>
<b>Revenues</b>			
Refunds	-	-	-
	-	-	-
<b>Expenditures</b>			
Branding	84,830	1,966,829	425,285
Destination Management	534,871	4,923,547	310,289
Governance and Org-Wide*	147,200	147,200	-
Perpetuating Hawaiian Culture	50,000	50,000	154,583
Planning & Evaluation	-	14,366	127,531
Resident and Industry Comms	1,977	49,977	44,259
Salaries	(5,492)	2,948	-
Workforce Development	7,000	7,000	17,000
Total	820,386	7,161,867	1,078,947
Change in Fund Balance	(820,386)	(7,161,867)	
Lapsed Funds*	(1,097,638)	(1,097,638)	
<b>Fund Balances</b>			
September 1, 2024 / July 1, 2024	2,996,971	9,338,452	
October 31, 2024	1,078,947	1,078,947	

\* Refer to notes of the financial statements for more information.

**Hawaii Tourism Authority**  
**Tourism Special Fund - Prior Year Funds**  
**Statement of Revenues, Expenditures, Changes in Fund Balances, and Encumbrances**  
**October 31, 2024**

	<b>Paid Two Month Period Ended October 31, 2024</b>	<b>Paid Year to Date</b>	<b>Remaining Encumbrances</b>
<b>Revenues</b>			
Interest, Net	-	47,696	-
Total	-	47,696	-
<b>Expenditures</b>			
Administration	-	-	65,332
Branding	83,369	107,334	448,375
Destination Management	-	-	230,000
Resident and Industry Comms	-	-	22,318
Workforce Development	-	-	86,000
Total	83,369	107,334	852,025
Change in Fund Balance	(83,369)	(59,638)	
<b>Fund Balances</b>			
September 1, 2024 / July 1, 2024	8,431,851	8,408,120	
October 31, 2024	8,348,482	8,348,482	

\* 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**  
**October 31, 2024**

	<b>Paid Two Month Period Ended October 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>			
September 1, 2024 / July 1, 2024	2,078,262	2,078,262	
October 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**  
**October 31, 2024**

	<b>Paid Two Month Period Ended October 31, 2024</b>	<b>Paid Year to Date</b>	<b>Remaining Encumbrances</b>
<b>Revenues</b>			
HCC Operations	316,835	316,835	-
Interest	138,481	138,481	-
TAT	11,000,000	11,000,000	-
Total	<u>11,455,316</u>	<u>11,455,316</u>	-
<b>Expenditures</b>			
HCC Marketing	-	-	-
HCC Operations	-	-	525,999
HCC Repairs and Maintenance	-	-	-
Total	<u>-</u>	<u>-</u>	<u>525,999</u>
Change in Fund Balance	<u>11,455,316</u>	<u>11,455,316</u>	
<b>Fund Balances</b>			
September 1, 2024 / July 1, 2024	<u>47,754,689</u>	<u>47,754,689</u>	
October 31, 2024	<u>59,210,005</u>	<u>59,210,005</u>	

\* 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**  
**October 31, 2024**

	<b>Paid Two Month Period Ended October 31, 2024</b>	<b>Paid Year to Date</b>	<b>Remaining Encumbrances</b>
<b>Revenues</b>			
Refunds	-	-	-
	-	-	-
<b>Expenditures</b>			
HCC Full Roof Repair	49,439	149,754	738,534
HCC Roof Related Projects	-	-	13,684,100
Total	49,439	149,754	14,422,634
Change in Fund Balance	(49,439)	(149,754)	
<b>Fund Balances</b>			
September 1, 2024 / July 1, 2024	14,472,073	14,572,388	
October 31, 2024	14,422,634	14,422,634	

\* 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**  
**October 31, 2024**

	<b>Paid Two Month Period Ended October 31, 2024</b>	<b>Paid Year to Date</b>	<b>Remaining Encumbrances</b>
<b>Revenues</b>			
Change in Fair Value	-	-	-
Interest, Net	3,053	3,053	-
Total	3,053	3,053	-
<b>Expenditures</b>			
Administration	2,500	2,500	-
Branding	-	-	100,000
Destination Management	-	-	180,000
Planning & Evaluation	-	25,000	-
Resident and Industry Comms	3,600	77,819	9,163
Safety and Security	-	-	-
Total	6,100	105,319	289,163
Change in Fund Balance	(3,047)	(102,266)	
<b>Fund Balances</b>			
September 1, 2024 / July 1, 2024	672,940	772,159	
October 31, 2024	669,893	669,893	

\* 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**  
**October 31, 2024**

	<b>Paid Two Month Period Ended October 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	280,000	280,000	5,720,345
Planning & Evaluation	-	-	-
Salaries and Fringe	-	-	-
Total	280,000	2,780,000	5,720,345
Change in Fund Balance	(280,000)	(2,780,000)	
<b>Fund Balances</b>			
September 1, 2024 / July 1, 2024	9,056,717	11,556,717	
October 31, 2024	8,776,717	8,776,717	

\* Refer to notes of the financial statements for more information.



Hawaii Tourism Authority  
October 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 (DBEDT), for administrative purposes only. The Authority is subject to administrative control and supervision of DBEDT under HRS 26-35. 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. All 12 members shall be appointed by the Governor.

**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, including additional adjustments to allotment and restrictions. The HTA staff and board have discussed the matter and have informed all major vendors to adjust plans and budgets accordingly. Unspent and unencumbered General 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.

Hawaii Tourism Authority  
October 31, 2024  
Selected Management Disclosures

The Legislature did not provide the CCESF with an expenditure ceiling in fiscal year 2024 for HCC operations. As such, the Department of Budget and Finance (B&F) agreed to provide \$11,000,000 in general funds from Section 5 of Act 164, SLH 2023, to HTA for fiscal year 2024 HCC operations, on the condition that HTA will transfer \$11,000,000 from the CCESF to B&F. HTA expects to complete the transfer in fiscal year 2026.

- **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 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, 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 eighteenth emergency proclamation dated October 8, 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 Tourism Authority  
October 31, 2024  
Selected Management Disclosures

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.

**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 Tourism Authority  
October 31, 2024  
Selected Management Disclosures

**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.

**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. A second plan was approved for \$130,000 on October 3, 2024. Spending to date is summarized below:

<b>Maui Response and Recovery Plan - \$5,000,000 - Spending to 10/31/24</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	341,558	7,749
Visitor Education Post-Arrival Marketing	300,000	150,000	150,000
Immediate Wildfire Response	250,693	250,693	0
Maui Street Market (canceled)	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>4,717,251</b>	<b>282,749</b>

<b>Maui Recovery Plan - \$130,000 - Spending to 10/31/24</b>			
USA Recovery Marketing Program #3	100,000	0	100,000
Pop-Up Makeke	23,000	0	23,000
Marketing Promotions for Sports Event	7,000	0	7,000
<b>Total</b>	<b>130,000</b>	<b>0</b>	<b>130,000</b>

**Supplementary Information**

**Hawaii Tourism Authority**  
**Supplementary Information**  
**Budget vs. Actual**  
**Tourism General Funds - Fiscal Year 2025**  
**July 1, 2024 to October 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	35,300	8,900	44,200	89,000	44,800
HTUS/HTJ Campaign Effectiveness Study	010	45,888	116,112	18,000	180,000	180,000	0
Community-Industry Outreach & PR Svcs hawaiitourismauthority.org	101	0	87,000	25,000	112,000	250,000	138,000
Travel - Branding	103	0	0	2,500	2,500	25,000	22,500
Travel - Branding	398	1,753	0	5,000	6,753	50,000	43,247
Program Evaluation	654	0	0	9,000	9,000	90,000	81,000
Travel - Destination Stewardship	898	124	0	5,000	5,124	50,000	44,876
General and Administrative	901	50,802	101,916	81,268	233,986	777,230	543,244
Organization-Wide	915	0	0	46,111	46,111	461,111	415,000
Governance - Gen Board Others	919	15,187	0	3,000	18,187	30,000	11,813
State Employee Salaries - Admin	930	598,736	0	159,887	758,623	1,634,319	875,696
Travel - Admin	998	4,955	0	6,000	10,955	60,000	49,045
<b>Administration and Governance</b>	<b>Total BED113</b>	<b>717,445</b>	<b>340,328</b>	<b>369,666</b>	<b>1,427,439</b>	<b>3,696,660</b>	<b>2,269,221</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 gohawaii.com	317	500,000	0	263,388	763,388	2,633,884	1,870,496
	318	192,709	49,189	45,833	287,731	458,333	170,602
MCI MFF	319	0	250,000	140,888	390,888	1,408,882	1,017,994
Island Chapters Staffing and Admin	320	0	0	160,000	160,000	1,600,000	1,440,000
US (formerly North America)	321	2,565,293	1,300,000	1,672,445	5,537,738	16,724,445	11,186,707
Canada	322	0	442,638	100,000	542,638	1,000,000	457,362
Japan	323	1,260,000	0	650,000	1,910,000	6,500,000	4,590,000
Korea	324	162,634	235,642	90,000	488,276	900,000	411,724
Oceania	325	0	301,362	129,091	430,453	1,290,905	860,452
Europe	326	189,817	261,821	100,000	551,638	1,000,000	448,362
Meetings, Convention & Incentives	331	500,000	0	263,388	763,388	2,633,884	1,870,496
Global Digital Marketing Strategy	339	192,708	49,190	45,833	287,731	458,333	170,602
Global Mkt Shared Resources	350	192,709	49,190	45,834	287,733	458,334	170,601
State Employee Salaries - Branding	934	50,818	0	58,220	109,038	582,201	473,163
<b>Branding and Marketing</b>	<b>Total BED114</b>	<b>5,806,688</b>	<b>2,939,032</b>	<b>3,924,920</b>	<b>12,670,640</b>	<b>39,249,201</b>	<b>26,578,561</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	750,000	83,333	833,333	833,333	0
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>750,000</b>	<b>731,808</b>	<b>1,481,808</b>	<b>7,318,075</b>	<b>5,836,267</b>
<b>Destination Stewardship and Community</b>	<b>BED116</b>						
Pono Travel Education Program	014	0	122,706	96,415	219,121	964,148	745,027
Aloha Aina (formerly NR and Leg Prov NR)	402	0	0	78,402	78,402	784,022	705,620
Visitor Assistance Programs	601	0	90,000	65,000	155,000	650,000	495,000
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	46,536	0	61,954	108,490	619,537	511,047
<b>Destination Stewardship and Community</b>	<b>Total BED116</b>	<b>46,536</b>	<b>212,706</b>	<b>792,388</b>	<b>1,051,630</b>	<b>7,923,883</b>	<b>6,872,253</b>

**Hawaii Tourism Authority  
Supplementary Information  
Budget vs. Actual  
Tourism General Funds - Fiscal Year 2025  
July 1, 2024 to October 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>Regenerative Tourism Development</b>	<b>BED117</b>						
Kukulu Ola: Living Hawaiian Cultural Prog	201	0	264,967	78,402	343,369	784,022	440,653
Community Tourism Collaborative	656	0	264,967	168,260	433,227	1,682,603	1,249,376
Community Enrichment Program	701	0	264,967	106,627	371,594	1,066,270	694,676
State Employee Salaries - Regenerative Tourism	939	46,831	0	22,929	69,760	229,286	159,526
<b>Regenerative Tourism Development</b>	<b>Total BED117</b>	<b>46,831</b>	<b>794,901</b>	<b>376,218</b>	<b>1,217,950</b>	<b>3,762,181</b>	<b>2,544,231</b>
<b>Workforce Development</b>	<b>BED118</b>						
Hawai'i Tourism Summit	102	180,327	0	30,000	210,327	300,000	89,673
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	48,000	35,000	83,000	350,000	267,000
<b>Workforce Development</b>	<b>Total BED118</b>	<b>180,327</b>	<b>48,000</b>	<b>105,000</b>	<b>333,327</b>	<b>1,050,000</b>	<b>716,673</b>
<b>Total Fiscal Year 25 Tourism General Funds</b>		<b>6,797,827</b>	<b>5,084,967</b>	<b>6,300,000</b>	<b>18,182,794</b>	<b>63,000,000</b>	<b>44,817,206</b>



Statement of Account

Last statement: September 30, 2024  
This statement: October 31, 2024  
Total days in statement period: 31

Account:  
Number of Enclosures: (0)



00002983-TDBSAD11401101141074-LETTER02-000000 0  
HAWAII TOURISM AUTHORITY  
TOURISM EMERGENCY SPECIAL FUND  
1801 KALAKAUA AVE 1ST FL  
HONOLULU HI 96815

Direct inquiries to:  
888 643-3888  
  
BANK OF HAWAII  
111 S KING ST  
HONOLULU HI 96813

**Bank of Hawaii**

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**WHEN YOU NEED TO ORDER (OR REORDER) CHECKS OR OTHER BUSINESS ACCESSORIES, CALL BUSINESS SOLUTIONS BY HARLAND CLARKE TOLL-FREE AT 1-800-503-2345 FOR CONVENIENCE, QUALITY AND A FULL RANGE OF CHOICES. NEW BUSINESS CHECK ORDERS ARE ALSO WELCOME.**

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**Analyzed Business Checking**

Account number	0091-585227	Beginning balance	\$432,665.66
Low balance	\$432,665.66	Total additions	.00
Average balance	\$432,665.66	Total subtractions	.00
		Ending balance	<u>\$432,665.66</u>

**\*\* No activity this statement period \*\***



MEMBER FDIC

EQUAL HOUSING LENDER

00002983-001-001



Statement Period  
Account Number

10/01/2024 through 10/31/2024  
BANK OF HAWAII  
AGENT U/A DATED 10/31/2018 FOR  
HAWAII TOURISM AUTHORITY -  
TOURISM EMERGENCY TRUST  
FUND

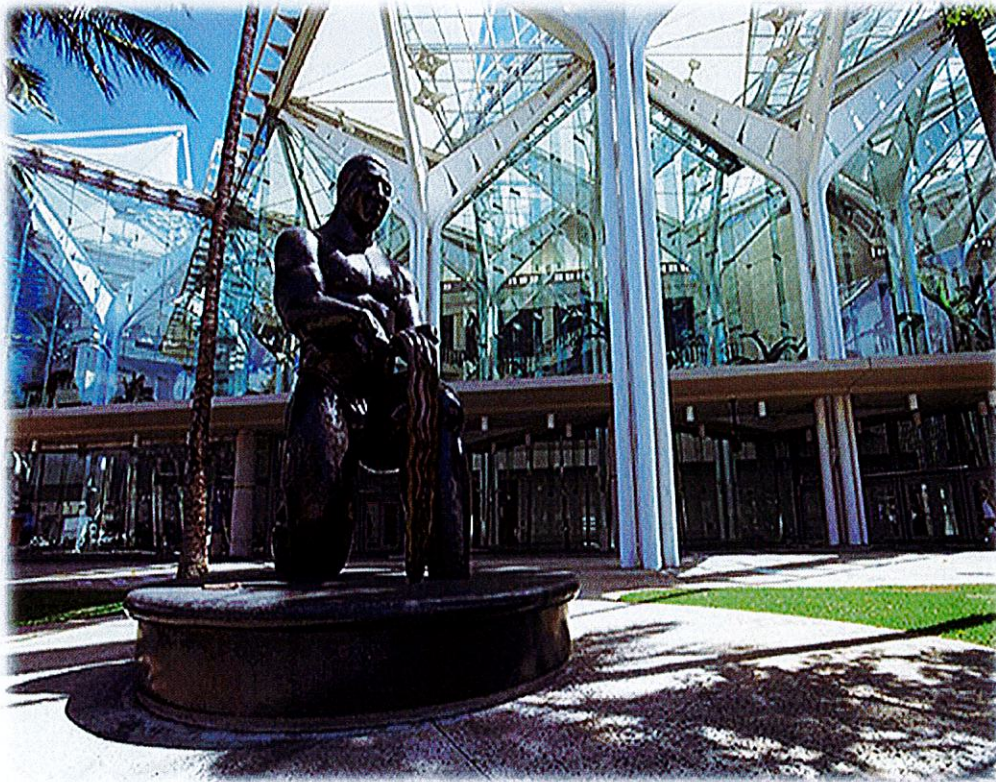
## Balance Sheet

	AS OF 10/01/2024		AS OF 10/31/2024	
	COST VALUE	MARKET VALUE	COST VALUE	MARKET VALUE
<b>A S S E T S</b>				
CASH	974.63	974.63	955.72	955.72
DUE FROM BROKERS	0.00	0.00	0.00	0.00
ACCRUED INCOME	0.00	0.00	0.00	0.00
<b>TOTAL CASH &amp; RECEIVABLES</b>	<b>974.63</b>	<b>974.63</b>	<b>955.72</b>	<b>955.72</b>
CASH EQUIVALENTS				
CASH MANAGEMENT	236,252.84	236,252.84	237,178.25	237,178.25
<b>TOTAL CASH EQUIVALENTS</b>	<b>236,252.84</b>	<b>236,252.84</b>	<b>237,178.25</b>	<b>237,178.25</b>
<b>TOTAL HOLDINGS</b>	<b>236,252.84</b>	<b>236,252.84</b>	<b>237,178.25</b>	<b>237,178.25</b>
<b>TOTAL ASSETS</b>	<b>237,227.47</b>	<b>237,227.47</b>	<b>238,133.97</b>	<b>238,133.97</b>
<b>L I A B I L I T I E S</b>				
DUE TO BROKERS	0.00	0.00	0.00	0.00
<b>TOTAL LIABILITIES</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>TOTAL NET ACCOUNT VALUE</b>	<b>237,227.47</b>	<b>237,227.47</b>	<b>238,133.97</b>	<b>238,133.97</b>
<b>TOTAL VALUE OF ACCOUNT</b>	<b>237,227.47</b>	<b>237,227.47</b>	<b>238,133.97</b>	<b>238,133.97</b>

## **11b**

**Motion, Discussion, and Action on the Hawai'i  
Convention Center's (HCC's) August 2024,  
September 2024, and October 2024 Financial  
Reports and Update on the Hawai'i  
Convention Center's 6-Year Repair and  
Maintenance Plan Recommend Approval**

# *Hawai'i Convention Center HTA Board Meeting Update*



*Update for  
October 2024  
For  
(November 2024 meeting)*

# Financial Update FY25

	Oct-24 Actual	FY 2025 Reforecast	FY 2025 Budget	Variance	FY 2024 Actual	FY 2023 Actual
Facility Number of Events	21	234	237	-3	262	273
Facility Operating Revenue	\$2,613,700	\$23,866,400	\$22,619,600	\$1,246,800	\$27,278,800	\$14,310,800
Facility Other Income	\$136,200	\$1,768,800	\$1,548,800	\$220,000	\$1,616,200	\$135,700
Facility Total Revenue	<b>\$2,749,900</b>	<b>\$25,635,200</b>	<b>\$24,168,400</b>	<b>\$1,466,800</b>	<b>\$28,895,000</b>	<b>\$14,446,500</b>
Facility Operating Expenses	-\$2,273,300	-\$27,785,100	-\$27,410,400	-\$374,700	-\$25,495,600	-\$18,412,200
Facility Net Income/(Subsidy)	<b>\$476,600</b>	<b>-\$2,149,900</b>	<b>-\$3,242,000</b>	<b>\$1,092,100</b>	<b>\$3,399,400</b>	<b>-\$3,965,700</b>
Local S&M Operating Expenses	-\$92,800	-\$1,428,200	-\$1,603,300	\$175,100	-\$1,036,600	-\$959,400
HCC Net Income/(Subsidy)	<b>\$383,800</b>	<b>-\$3,578,100</b>	<b>-\$4,845,300</b>	<b>\$1,267,200</b>	<b>\$2,362,800</b>	<b>-\$4,925,100</b>

## ROI October 2024 FYTD

HCC Revenue + State Revenue  
 +Tax Revenue  
 = \$188.7 M

<u>FYTD 2025</u>	<u>ROI</u>	<u>CW's FYTD</u>
07.24	\$2.36	(1)
08.24	\$17.43	(3)
09.24	\$13.71	(4)
10.24	\$16.67	(7)

HCC Expense + HVCB MCI  
 Expense = \$11.3 M

<u>FY 2024 ROI</u>		
07.23-06.24	\$14.64	(21)

***ROI = For every dollar spent,  
 \$16.67 returned to the State***

<u>FY 2023 ROI</u>		
07.22-06.23	\$4.19	(7)

# FY 2025 (July 2024 – June 2025) Citywide Events

REPORT - PACE - CW - DEFINITES ON THE BOOKS - FY

Created By: Test User  
Created On: 10/01/2024

Fiscal Year: Contract Room Block Begin	Total Bookings	Total Contract Rooms	Total Attendees	Total EEI Value	Tax Generation
2024	21	109497	56500	\$390,944,353.03	\$45,740,489.30
2025	18	111434	67050	\$379,574,197.62	\$44,410,181.12
2026	12	124883	47150	\$322,798,109.44	\$37,767,378.80
2027	7	83034	45200	\$272,666,955.16	\$31,902,033.75
2028	6	35246	18900	\$112,014,416.12	\$13,105,686.69
2029	1	3031	3200	\$18,913,205.09	\$2,212,845.00
2030	2	14274	8500	\$59,868,034.80	\$7,004,560.07
2031	4	76585	23000	\$157,992,298.37	\$18,485,098.91
2033	1	19550	6500	\$41,075,194.39	\$4,805,797.74
2036	1	40829	7000	\$53,244,980.15	\$6,229,662.68
<b>Grand Totals</b>	<b>73</b>	<b>618363</b>	<b>283000</b>	<b>\$1,809,091,744.17</b>	<b>\$211,663,734.07</b>

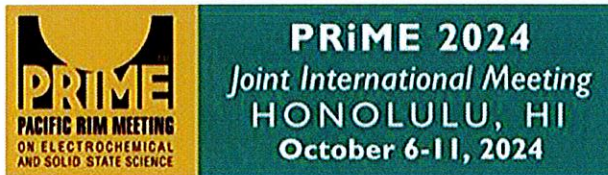
FY 25	
<b>Total Bookings</b>	<b>18</b>
<b>Total Contract Rooms</b>	<b>111,434</b>
<b>Total Attendees</b>	<b>67,050</b>
<b>Total EEI Value</b>	<b>\$379,574,197.62</b>
<b>Total Tax Generation</b>	<b>\$44,410,181.12</b>

Source: October 2024 Meet Hawai'i Pace "Definites on the Books FY" Report



# Recent Events @ Hawai'i Convention Center

- PRiME 2024, Oct 6-11, 4,800 attendees (CW)
- SIOP Congress 2024, Oct 17-20, 1,989 attendees (CW)
- 2024 AFCEA - TechNet Indo-Pacific, Oct 22-24, 4,023 attendees (CW)
- Hawai'i Food & Wine Festival, Nov 8, 1,004 attendees



## Upcoming Local/Citywide Events

- 2024 Honolulu Marathon Expo, Dec 5-9, estimated 60,000 attendees
- Aloha Region Christmas Festival Tournament 2024, Dec 21-22, estimated 1,500 attendees
- TransPacific Volleyball Championships 2025, Jan 18-20, 2025, estimated 15,000 attendees (CW)





# Definite Local/CW Bookings for next 3 months

Month	Total # of Local Events	Total # of Citywides
November 2024	27	0
December 2024	22	1
January 2025	8	1

**PRTEC2024**  
The 3<sup>rd</sup> Pacific Rim Thermal Engineering Conference



# HCC Introduces New Pickleball Courts, Inaugural Indoor Pickleball Games, Nov 1-3, 2024



# News Coverage: Pickleball Games

## COURTING VISITORS

Hawaii makes a play for the sports tourism market, starting with pickleball



CRAIG T. KOBIMA / CKOPIA&TAGADVERTISER.COM

### Inaugural pickleball festival expected to draw hundreds of players, spectators

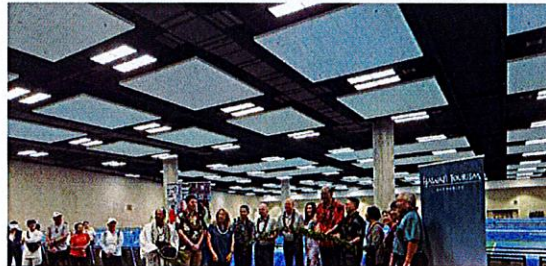


It's for all ages and skill levels and spots are still available!

### Hawaii Convention Center has blessing for 45 new pickleball courts ahead of big tournament

The Center invested in 45 new pickleball courts, with 19 designated for use in the Aloha Pickleball Games & Festival, emphasizing the Center's goal of becoming a premier destination for pickleball enthusiasts worldwide.

By Diane Ito Oct 26, 2024 updated 13 hrs ago



### America's fastest growing game heads to Hawaii Convention Center

Emily Cervantes 2 days ago



**HONOLULU (KHON2)** — It's been the fastest-growing sport in Hawaii and the entire U.S. for the past three years. Slow, pickleball is coming to the Hawaii Convention Center, which is booting a big tournament. It's the latest boost for a facility that's enjoying unprecedented success.

Download the free KHON2 app for iOS or Android to stay informed on the latest news.

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### Picklers, sign up for tournament at convention center

Nicole Haganone Thu, December 12, 2024 at 5:55 AM HST 1 hr read



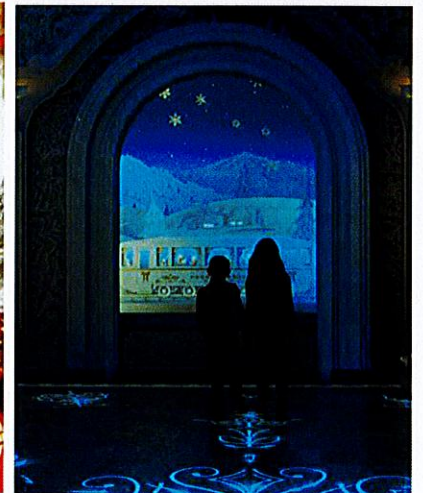
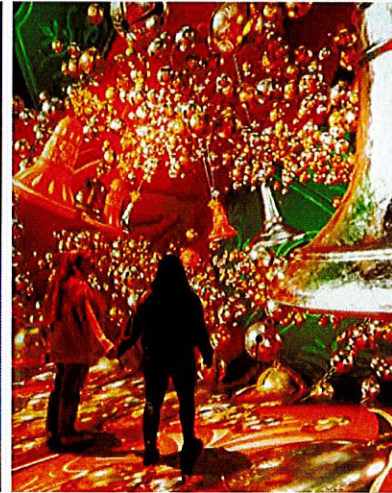
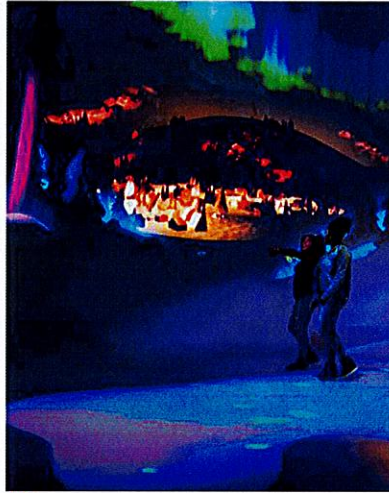
# 'Twas the Light Before Christmas

A WHIMSICAL CHRISTMAS EXPERIENCE

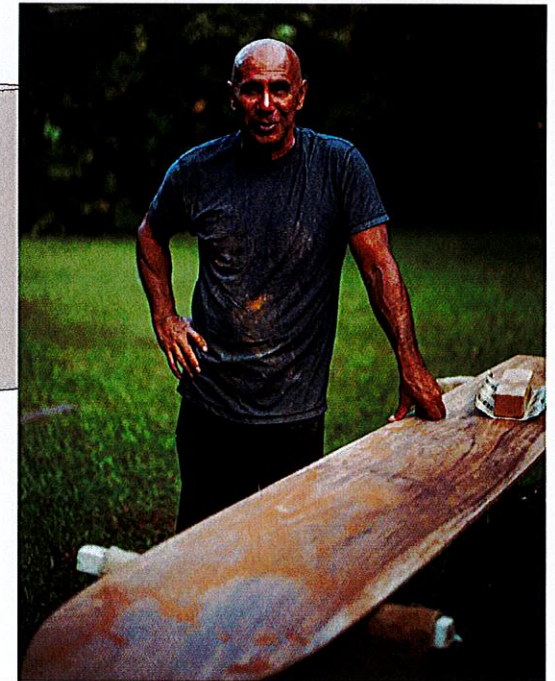
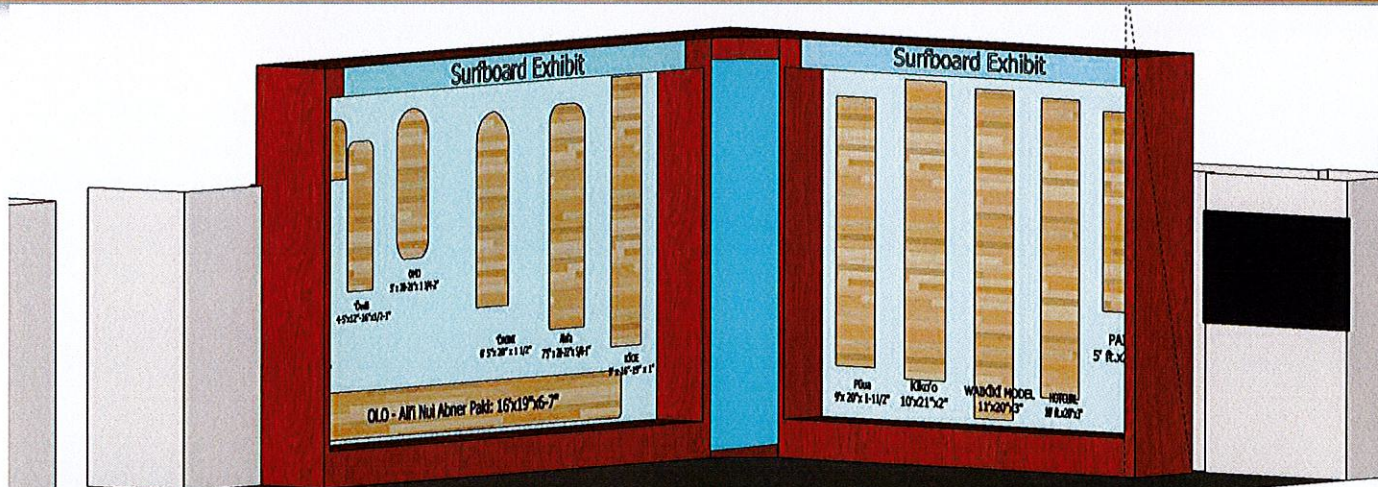
# 'Twas the Light Before Christmas

NOVEMBER 22 - DECEMBER 31  
HAWAI'I CONVENTION CENTER

[alohaimmersive.com](http://alohaimmersive.com)

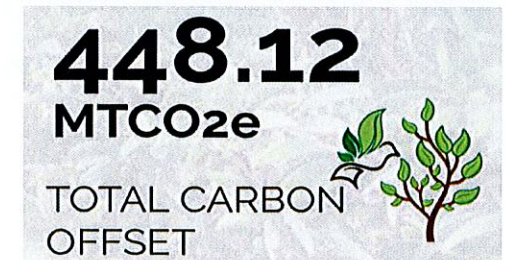
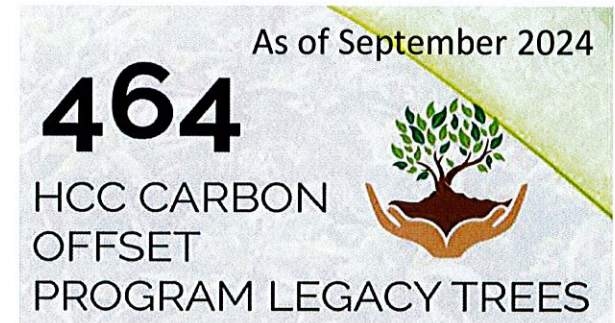


# New Art Exhibit in 2025: History of Surfing by Tom Pōhaku Stone



# Carbon Offset Program

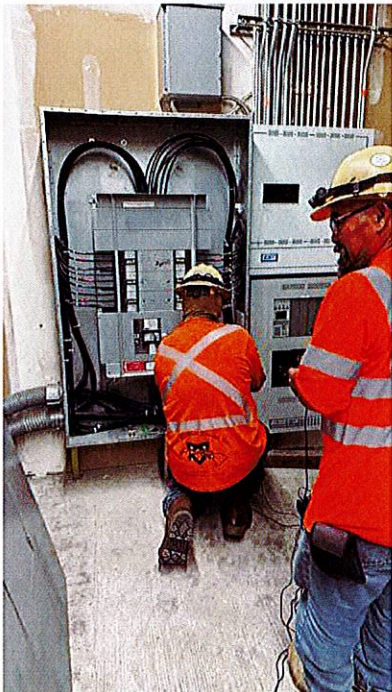
- This is a first-of-its-kind Carbon Offset Program that provides meeting organizers with the opportunity to offset the carbon footprint of their meeting.
- Participating events include:
  - 2024 & 2023 Okinawan Festival (11 trees/year)
  - 2024 Pokémon World Championships (51 trees)
  - 2024 Made in Hawaii Festival (17 trees)
  - Indoor Air 2024 (10 trees)
  - 2024 Honolulu Festival (17 trees)
  - 2024 Sony Open Gala Dinner (9 trees)
  - CHEST 2023 (42 trees)
  - 2023 International Conference on Machine Learning (36 trees)





# **Repair, Maintenance and Replacement Projects Update**

# Rooftop Terrace Repair Updates



Electric Metering

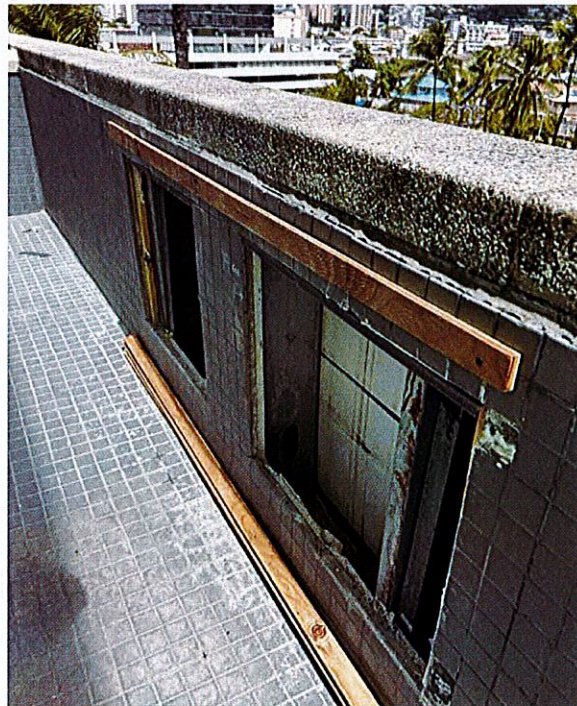


Destructive Investigation





# 3<sup>rd</sup> Fl and Exterior Planter Project



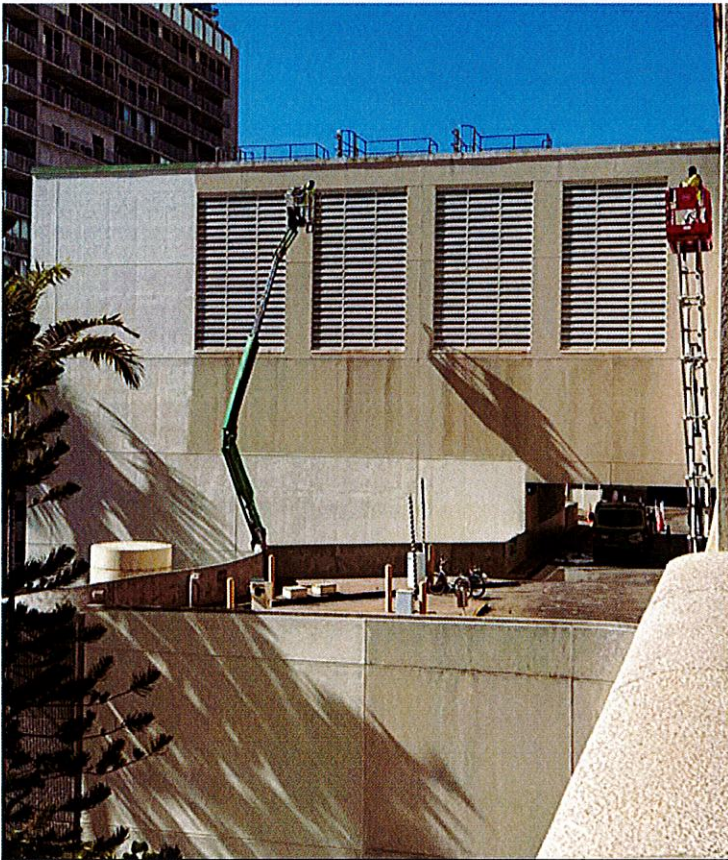
Work is progressing with destructive investigation on the 3rd floor and Exterior Planters. We have installed frosted film on the windows that face the planters, to hide the view of the construction and instead emphasize views of our beautiful mountain ranges and blue skies.

# LED Lighting Project



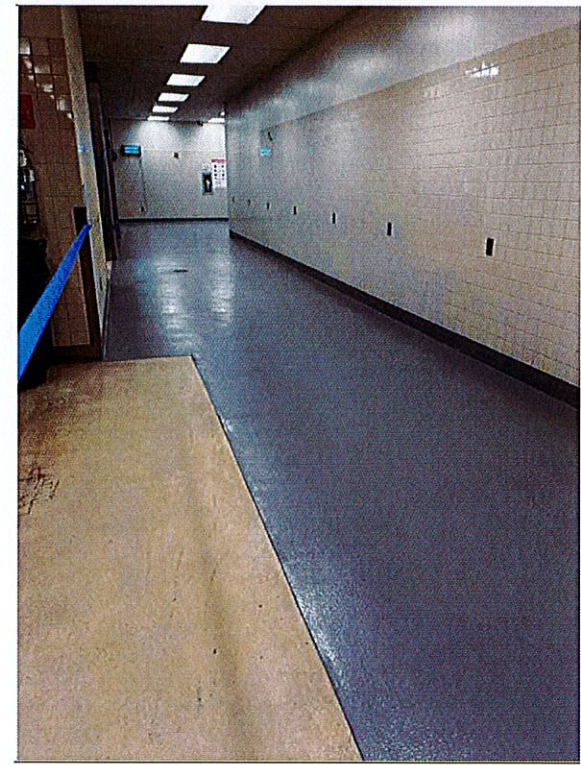
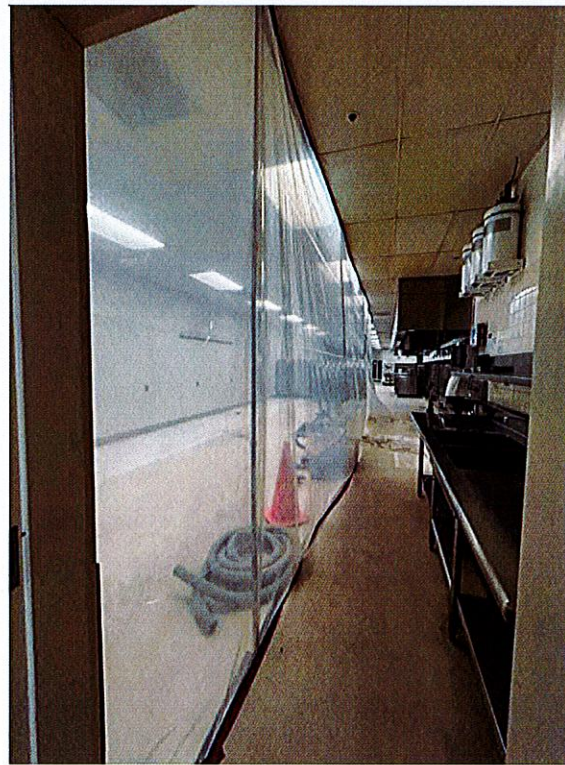
LED lighting which have been installed in the Ma uka corridors and meeting spaces, provide improved alternatives to illuminating the spaces. Controls are managed through apps and ipads installed in each of the rooms.

# Exterior Building Painting



We are nearly complete on the Kahakai Dr elevation of the building. It has been challenging to work around the cooling tower, the parking garage and the helixes. We will move to the Atkinson Dr / Kapi'olani Blvd elevation next.

# Main Kitchen Flooring



BEFORE: Prep floor and protect kitchen working areas

AFTER: Continuous sealed floor



# Chiller Replacement



Final work on installing the pumps for the new chillers.

# CURRENT PROJECTS

## ***IMPROVE GUEST EXPERIENCE***

- New F&B China, Banquet Displays, Service Equipment
- New Speakers and Equipment to upgrade sound in meeting rooms
- Upgrade Screens and add Surround Sound in Theatres
- Replace Escalators - start with Esc 1, 2 and 3
- Repair Meeting Room Air Walls
- New Wheelchair Lift in Theatre 320
- New Facilities Equipment
- New Retractable Bleacher Seating

## ***IMPROVE OUR BUILDING***

- Paint Entire Building Exterior and Interior
- Repair Leaks
  - Kalākaua Kitchen
  - Ballroom Roof
  - Lobby and Ballroom Foyer Ceiling
  - Planters – 3<sup>rd</sup> floor, Grand Staircase, Intermediate level
- New Air Conditioning Chillers
- Replace Green Slate Tile – 3<sup>rd</sup> floor and Ala Wai Patio
- Upgrade all Lighting to LED lights
- Install Solar panels for Energy Savings

## ***IMPROVE DEPARTMENT EFFICIENCY – New Equipment***

- New Boilers in Kalākaua Kitchen
- New Parking System and Equipment
- New Housekeeping Scrubber machines

# Repair, Maintenance and Replacement Projects

## Major Project Update

### Exterior Building Painting

- 25% of project completed, working on Kapi'olani Blvd, to continue around to Kalākaua Ave.

### Main and Satellite Kitchen Upgrades

- Upgrade to wet chemical suppression fire system and replacement of hood control panels are completed. Replacement of kitchen flooring is approximately 50% completed.

### LED Lighting Upgrade

- Completed Lobby and Porte Cochere, ma uka meeting rooms and Loading Docks. Ballroom is 75% completed. XHall installation has been challenging to schedule around many events. Ma kai meeting rooms will be completed after Rooftop Repair, which will remove ceilings in these rooms.

### New Equipment Purchases

- Received all components for the Interactive Immersive Experience and large Holiday Light displays. On time for the opening of the "Twas the Light Before Christmas" community event.

### Solar Photovoltaic System

- Proposals received from four companies, short listed proposals, scheduling presentations.

# Repair, Maintenance and Replacement Projects

## 6-Year Plan (page 1)

Project Number	Project Title	Estimated Project Cost	Est Complete	GOB/ CIP/OC	Prior Expenses Oct 2024	FY25	FY26	FY27	FY28	FY29	FY30	Total
003	Kalākāua Kitchen and Atkinson Drywell Renovation	\$ 12,871,047	CY 26	CIP	\$ 338,408	\$ 1,006,764	\$ 7,526,199	\$ 3,999,677				\$ 12,871,048
007	Kitchen Hood Control Panel Replacement	\$ 448,043	11 2024	CIP	\$ 230,611	\$ 217,432						\$ 448,043
009	Slate Tile Repair	\$ 722,691	CY 26	CIP	\$ 210,692	\$ 58,835	\$ 453,165					\$ 722,692
010	Chiller Replacement	\$ 6,154,288	11 2024	CIP	\$ 5,348,261	\$ 806,027						\$ 6,154,288
011	Ballroom Gutter, Foyer Transom Glass Roof Repair and Soffit R	\$ 16,091,748	CY 26	CIP	\$ 108,200	\$ 606,241	\$ 7,805,259	\$ 7,572,048				\$ 16,091,748
012	Parapet Roof Repairs	\$ 2,374,257	Q2 25	CIP	\$ 65,209	\$ 2,309,048						\$ 2,374,257
013	Ballroom Roof Repairs	\$ 1,575,688	Q2 25	CIP	\$ 222,128	\$ 1,353,560						\$ 1,575,688
014	Lobby Water Feature	\$ 1,086,810	FY 28	CIP	\$ 3,932				\$ 1,082,878			\$ 1,086,810
015	House Sound Audio System Upgrade	\$ 5,665,068	CY 26	OC	\$ 84,988	\$ 2,473,672		\$ 3,106,407				\$ 5,665,067
023	Air Wall Repairs	\$ 282,058	Q1 25	CIP	\$ 89,061	\$ 192,996						\$ 282,057
024	Roll-up Door Replacement	\$ 225,000	CY 26	CIP	\$ 23,656		\$ 201,344					\$ 225,000
026	IT Network Upgrades	\$ 300,000	Q2 25	OC	\$ -		\$ 300,000					\$ 300,000
027	Ice Machines Replacement	\$ 500,000	Q2 25	OC	\$ -	\$ 500,000						\$ 500,000
028	Theatre 310 and 320 Furnishings Upgrade	\$ 750,000	FY 28	OC	\$ -				\$ 375,000	\$ 375,000		\$ 750,000
029	Theatre 310 and 320 Seating Upgrade	\$ 500,000	FY 28	CIP	\$ 155				\$ 249,845	\$ 250,000		\$ 500,000
030	FB China and Equipment Upgrade - #2	\$ 6,094,591	12 2024	OC	\$ 4,466,154	\$ 1,628,436						\$ 6,094,590
031	Ala Wai Waterfall Repair	\$ 1,081,501	FY 28	CIP	\$ 1,985				\$ 1,079,516			\$ 1,081,501
041	Exterior Building Door Replacement	\$ 50,000	Q1 25	OC	\$ -	\$ 50,000						\$ 50,000
042	CM/PM - 2nd Company	\$ 150	12 2024	CIP	\$ 150							\$ 150
044	Fire Sprinkler Line Refurbishment	\$ 353,394	Q3 25	CIP	\$ 13,945	\$ 211,055	\$ 128,394					\$ 353,394
045	Escalator Modernization	\$ 7,927,869	CY 26	CIP	\$ 54,309	\$ 3,580,354	\$ 2,520,000	\$ 1,773,205				\$ 7,927,868
046	LED Light Upgrade	\$ 6,510,416	CY 26	CIP	\$ 3,305,993	\$ 810,403		\$ 2,394,020				\$ 6,510,416
047	Pickleball Equipment	\$ 558,697	12 2024	OC	\$ 243,588	\$ 315,109						\$ 558,697
048	Electrical Harmonics Testing	\$ 100,000	FY 28	CIP	\$ -				\$ 100,000			\$ 100,000



# Repair, Maintenance and Replacement Projects

## 6-Year Plan (page 2)

Project Number	Project Title	Estimated Project Cost	Est Complete	GOB/ CIP/OC	Prior Expenses						Total	
					Oct 2024	FY25	FY26	FY27	FY28	FY29		FY30
050	Main Kitchen Flooring Replacement	\$ 648,881	Q1 25	CIP	\$ 193,606	\$ 455,275						\$ 648,881
051	Phone System Replacement	\$ 30,000	Q2 25	OC	\$ -	\$ 30,000						\$ 30,000
054	Boardroom Upgrade	\$ 1,099,549	CY 26	OC	\$ 115,802	\$ -	\$ 983,747					\$ 1,099,549
055	Elevator #2 Upgrade	\$ 250,000	FY 28	CIP	\$ -				\$ 250,000			\$ 250,000
058	Kitchen Hood Fire Suppression System Replacement	\$ 374,430	11 2024	CIP	\$ 332,262	\$ 42,169						\$ 374,431
060	Lobby Sail Repair and Maintenance	\$ 179,000	Q3 25	CIP	\$ 41,196		\$ 61,021		\$ 76,783			\$ 179,000
061	ADA Lift (#320) Replacement	\$ 165,000	Q1 25	CIP	\$ 91,515	\$ 73,485						\$ 165,000
064	F&B Equipment - #1	\$ 1,364,759	12 2024	OC	\$ 1,273,141	\$ 91,618						\$ 1,364,759
066	Kalākaua Kitchen Boiler Replacement	\$ 330,000	Q2 25	OC	\$ 10,223	\$ 319,777						\$ 330,000
068	3rd Floor Planter Repair and Exterior Planter Repair	\$ 12,399,209	Q2 26	CIP	\$ 584,523	\$ 2,580,558	\$ 9,234,128					\$ 12,399,209
069	Parking System Equipment Upgrade	\$ 583,753	Q2 25	CIP	\$ 61,701	\$ 522,052						\$ 583,753
070	Parking Garage Floor Sealing	\$ 2,444,244	Q2 25	CIP	\$ -	\$ 2,444,244						\$ 2,444,244
071	Access Control Upgrade	\$ 2,000,000	Q1 26	CIP	\$ -	\$ 1,000,000	\$ 1,000,000					\$ 2,000,000
073	Common Area Furniture Refirbishment	\$ 265,000	Q1 25	OC	\$ -	\$ 265,000						\$ 265,000
074	Ice Rink and Equipment	\$ 825,000	Q2 25	CIP	\$ -	\$ 825,000						\$ 825,000
075	Exterior Building Painting	\$ 2,659,418	Q2 26	CIP	\$ 510,015	\$ 293,790	\$ 1,855,613					\$ 2,659,418
077	Interior Building Painting	\$ 5,139,686	CY 26	CIP	\$ 34,942	\$ 2,488,210	\$ 2,616,534					\$ 5,139,686
079	Digital Signage Upgrade	\$ 6,150,000	CY 26	CIP	\$ 20,390	\$ 3,000,000	\$ 3,129,610					\$ 6,150,000
081	Facility Equipment Replacement	\$ 1,000,000	Q2 25	OC	\$ 47,637	\$ 500,000	\$ 452,363					\$ 1,000,000
082	Escalator and Elevator Repairs	\$ 1,000,000	CY 26	CIP	\$ 417,493	\$ 250,277	\$ 332,230					\$ 1,000,000
083	Café 808 Renovation	\$ 3,000,000	Q2 25	CIP	\$ -	\$ 3,000,000						\$ 3,000,000
084	Frictionlist Concession	\$ 1,500,000	Q2 26	CIP	\$ -		\$ 1,500,000					\$ 1,500,000
085	1801 Renovation	\$ 1,500,000	Q2 25	CIP	\$ -	\$ 1,500,000						\$ 1,500,000
086	Water Remediation - Misc Repairs/Equipment	\$ 500,000	Q2 26	CIP	\$ 4,324	\$ 245,676	\$ 250,000					\$ 500,000

# Repair, Maintenance and Replacement Projects

## 6-Year Plan (page 3)

Project Number	Project Title	Estimated Project Cost	Est Complete	GOB/ CIP/OC	Prior Expenses Oct 2024	FY25	FY26	FY27	FY28	FY29	FY30	Total
089	Cabling Infrastructure Upgrade	\$ 850,000	Q2 25	CIP	\$ 218,737	\$ 631,263						\$ 850,000
091	Loading Dock Supply Fans	\$ 225,000	Q2 25	OC	\$ -	\$ 225,000						\$ 225,000
093	ADA Compliance	\$ 1,500,000	Q2 25	CIP	\$ 700	\$ 1,499,300						\$ 1,500,000
094	Solar Panel Installation	\$ 7,089,400	Q2 26	CIP	\$ 20,816	\$ 3,489,684	\$ 3,578,900					\$ 7,089,400
095	Immersive Experience Equipment	\$ 1,297,000	12 2024	CIP	\$ 463,201	\$ 833,799						\$ 1,297,000
096	Holiday Light Displays	\$ 615,963	12 2024	CIP	\$ 311,466	\$ 304,497						\$ 615,963
097	Carpet Replacement	\$ 4,000,000	CY 26	CIP	\$ -		\$ 4,000,000					\$ 4,000,000
098	Sketch-up Revisions	\$ 30,000	12 2024	OC	\$ -	\$ 30,000						\$ 30,000
099	Fire Alarm System	\$ 1,500,000	Q2 25	CIP	\$ -	\$ 1,500,000						\$ 1,500,000
100	Retractable Seating	\$ 1,000,000	Q2 25	CIP	\$ 89	\$ 999,911						\$ 1,000,000
	Legal Retainer	\$ 251,094			\$ 162,337	\$ 20,000	\$ 68,757					\$ 251,094
	<b>GRAND TOTAL</b>	<b>\$135,989,702</b>			<b>\$19,727,541</b>	<b>\$45,580,517</b>	<b>\$ 47,997,264</b>	<b>\$18,845,357</b>	<b>\$ 3,214,022</b>	<b>\$ 625,000</b>	<b>\$ -</b>	

Last updated: November 18, 2024

- Current project
- Cumming-managed project
- HCC-managed project
- CM/PM - to be assigned



# Repair, Maintenance and Replacement Projects

## CUMMING GROUP Priority Projects

- *Kitchen Hood Control Panel and Fire Suppression Upgrade*
- *Slate Tile Repair*
- *Chiller Replacement*
- *Ballroom Roof Repairs*
- *House Sound Audio Upgrade*
- *Ballroom Gutter, Foyer Transom Glass and Soffit Repair*
- *3<sup>rd</sup> floor and Exterior Planters Repair*
- *LED Lighting Upgrade*
- *Main Kitchen Flooring Replacement*
- *Exterior Building Painting*
- *Kalākaua Kitchen Wall Repair and Atkinson Drywell Replacement*
- *Interior Building Painting*
- *Parking Garage Equipment Upgrade and Floor Sealing*
- *Fire Sprinkler Line Refurbishment*
- *Escalator Modernization*
- *Kalākaua Kitchen Boiler Replacement*
- *Exterior Door Replacement*
- *Solar Photovoltaic System*

# Repair, Maintenance and Replacement Projects Completed (since 2020)

## COMPLETED 2020

- Gutter Trough, Roof Repairs; \$8.3M
- Boiler Replacement; \$585k
- Ala Wai Waterfall Repairs; \$185k
- Chiller 4 Repairs; \$55k
- #320 Roof Repairs; \$1.4M
- Banquet Chairs/Tables Upgrade; \$2.25M

## COMPLETED 2021

- Cooling Tower Replacement; \$3.2M
- Theatre LED Lighting Upgrade; \$77k
- Roof Overflow Drain Repairs; \$16k
- Jockey Chiller Repairs; \$28k
- ADA Lift Replacement; \$71.5k
- Emergency Generator Repairs; \$32k
- Window Repairs – Vandalism; \$177k

## COMPLETED 2022

- Leak Repairs – 12/21-1/22; \$396k
- Chiller Repairs; \$69.3k
- Trellis Renovation; \$4.7M
- Lobby Glass Replacement; \$25k
- New Security Camera, Access Control; \$1.56M
- Kitchen AC Compressor Replacement; \$16.5k

## COMPLETED 2023

- Event Stage ADA Ramp; \$41k
- Escalator #1 Handrail Replacement; \$64k
- Exterior Sign Refurbishment; \$50k
- Leak Repair Remediation; \$168k
- Forklift Replacement; \$175k

## COMPLETED 2024

- Water Intrusion Remediation; \$400k
- Ballroom Wallcovering; \$200k
- Exterior Security Camera; \$225k
- Transformer Replacement; \$131k
- #348 Walk-in Refrigerator Replacement, \$123k
- Lobby Glass Repair, Vandalism, \$26k
- Ride-on Sweeper Replacement, \$50k
- Main Kitchen Dishwasher Replacement, \$425k
- Pot Wash and Glass Wash Machine Replacement, \$212k
- Chill Water Pipe Reinsulation, \$1.2M
- Sump Pump Replacement, \$58k
- Ride-on Scrubber Replacement, \$86k

A close-up photograph of a boat's rigging system. A wooden boom is visible, with a pulley block attached. The rigging consists of numerous ropes and lines, some of which are secured with knots. The background is slightly blurred, showing more of the boat's structure and some greenery. The text "Mahalo Nui Loa" is overlaid in the center of the image in a white, sans-serif font.

Mahalo Nui Loa

**12**

**Report and Update by the  
BRANDING STANDING COMMITTEE**

## **12a**

**Presentation and/or Discussion on the  
Los Angeles Saturation Activation and Other  
Updates from Hawai'i Tourism United States  
(HTUSA)**

# Hawai'i Tourism Authority Branding Standing Committee

November 21, 2024







# Los Angeles Market Activation

# Los Angeles Market Activation September



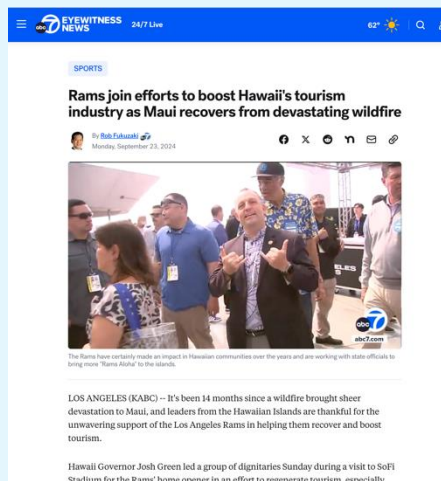
**Aloha Market with  
Mana Up**



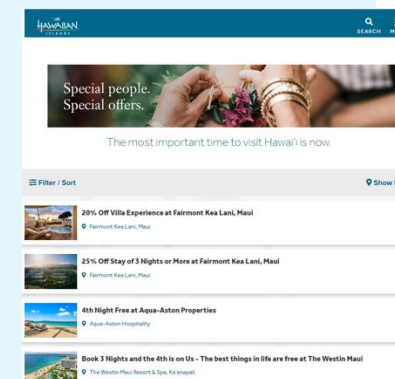
**RAMS HOST HAWAII DIGNITARIES AMID RECOVERY**



**MAYOR RICHARD BISSEN  
MAUI COUNTY, HI**



## Public/Private Media Blitz

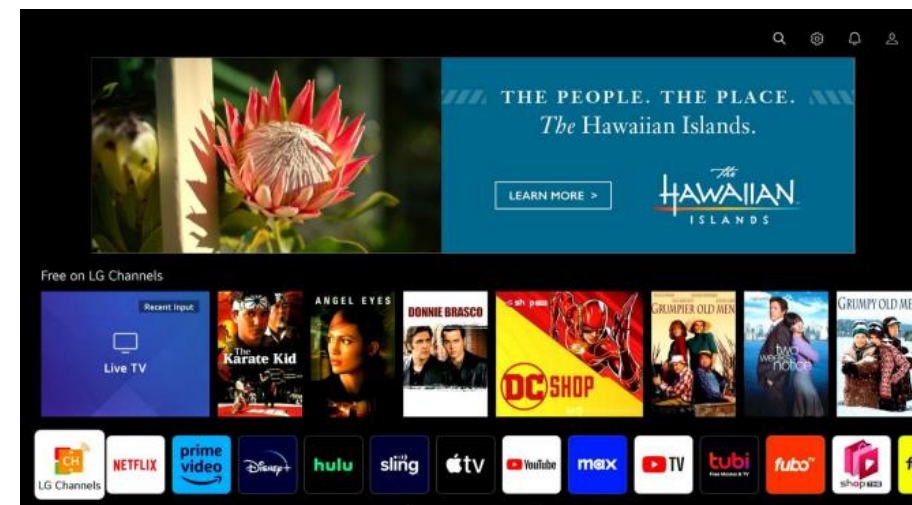
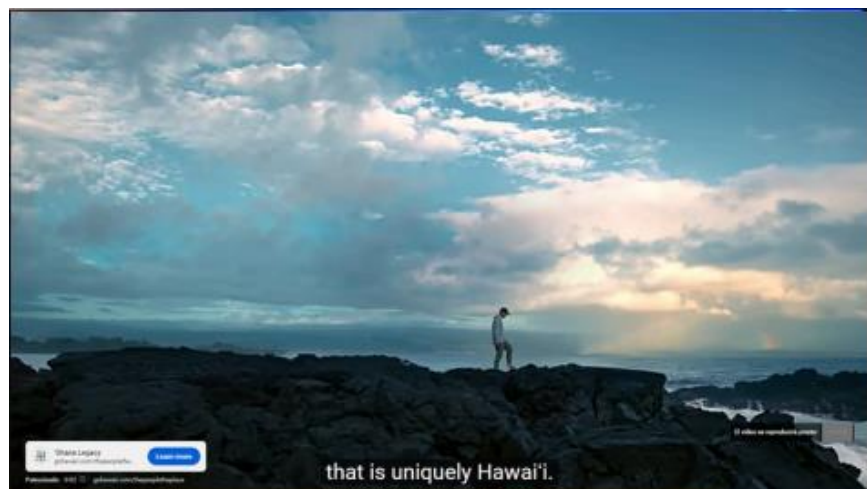
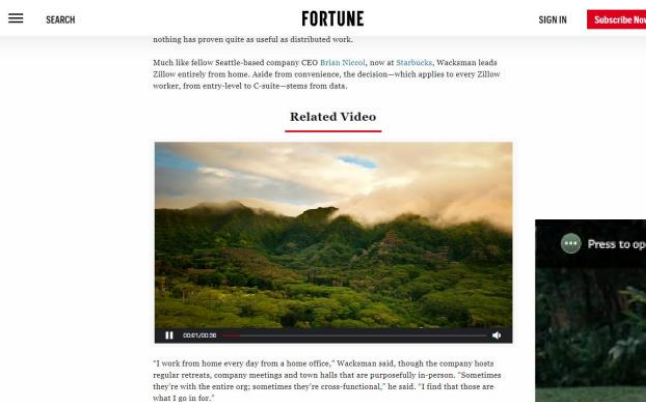


## Consumer Direct Coop Programs



# Paid Digital Media

- YouTube TV: 18.6M impressions
- LG: 14.5M impressions
- Trip Advisor: 5.5M impressions



# Paid Social

- **The People. The Place. The Hawaiian Islands.** content series promoted in Los Angeles and San Diego on Facebook and Instagram
- Promoted Maui on TikTok in Los Angeles
- **Results:**
  - Facebook: 5.8M impressions
  - Instagram: 4.9M impressions
  - TikTok: 4.6M impressions



# Consumer Activation

## Aloha Market Pop-up

- Mana Up Hawai'i partnership
- Heart of Abbot Kinney Boulevard, a buzzy neighborhood with great foot traffic
- 57 Hawai'i brands, 11 from Maui
- 9,328 attendees over three days
- 31 activations included workshops, demos and panels
- VIP Receptions excited media, influencers, travel advisors, MCI clients
- Local coverage on KTLA, ABC, FOX
- Generated 36,513,073 impressions across 28 media placements



# Aloha Market Featured Local Businesses

Advance Wildlife Education  
ava + oliver  
AVVA  
Big Island Coffee Roasters  
Bizia  
Bradley & Lily  
Chef Sheldon Simeon  
Coco Moon  
David Shepard  
Farm to Fudge Maui  
Haku Maui (collaboration with Tag Aloha)  
Hanalei  
Hawaii Ulu Coop  
Hawaiian Airlines  
Hawaiian Host  
Hawaiian Pie Co.  
Hawaiian Soda Co.  
HI Spice  
Hobbs Tea

Honolulu Cookie Co.  
Honua Skincare  
Jules + Gem Hawai'i  
Kahala  
Kaua'i Sweet Shoppe  
Keiki Kaukau  
Kō Hana Rum  
King's Hawaiian  
Kris Goto  
Liko Lehua  
Mālama Mushrooms  
Mānoa Chocolate  
Maui Brewing Company  
Maui Chili Chili Oil  
Maui Crisps  
Maui Kuia Estate  
Mauna Loa  
Meli Wraps  
Mohala Eyewear

Nāpili FLO Farm  
Nick Kuchar Art & Design Co.  
NOHO Home  
'Ohana Nui  
Ocean Vodka  
Pawniolo Pets  
Pono Potions  
Sea Salts of Hawai'i  
Shaka Tea  
Tag Aloha Co.  
Tea Chest Hawai'i  
To Be  
ua body  
UBAE  
VitaliTea Hawai'i  
Wai Meli  
Waiākea Hawaiian Volcanic Water  
Waiwaolani  
Western Aloha



# High Impact Messaging Platforms



The Rams have certainly made an impact in Hawaiian communities over the years and are working with state officials to bring more "Rams Aloha" to the islands.



SPORTS

## Rams join efforts to boost Hawaii's tourism industry as Maui recovers from devastating wildfire

By [Bob Fukuzaki](#)  
Monday, September 23, 2024



The Rams have certainly made an impact in Hawaiian communities over the years and are working with state officials to bring more "Rams Aloha" to the islands.

LOS ANGELES (KABC) -- It's been 14 months since a wildfire brought sheer devastation to Maui, and leaders from the Hawaiian Islands are thankful for the unwavering support of the Los Angeles Rams in helping them recover and boost tourism.

Hawaii Governor Josh Green led a group of dignitaries Sunday during a visit to SoFi Stadium for the Rams' home opener in an effort to regenerate tourism, especially



# LA Unscripted Maui



## LIFESTYLE SHOW SUMMARY

**PLANNED:** 3 show airings; 1x primetime, 1x wknd, 1x daytime

**ACTUAL:** 3 show airings; ALL PRIMETIME

**ADDITIONAL AIRING** planned for 11/27 7:30PM (subject to change)

**1,018,357 HH Reach**

"LA UNSCRIPTED: The People. The Place. Maui."	HH REACH
Promo schedule	812,650
LA Unscripted 9/27 7:30PM	64,878
LA Unscripted 10/3 7:30PM	80,112
LA Unscripted 10/9 7:30PM	60,737
<b>TOTAL HH REACH</b>	<b>1,018,357</b>



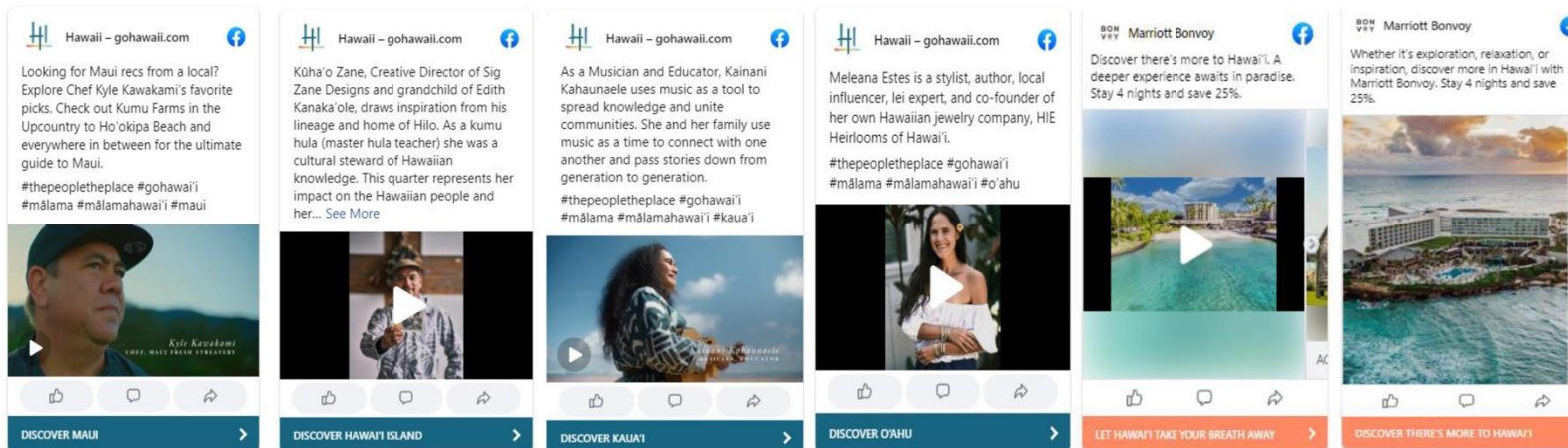
# LA Unscripted Maui



## SOCIAL DISPLAY SUMMARY

KTLA.com

**PLANNED:** 500,000 Impressions  
**ACTUAL:** 502,766 Impressions  
 802 Clicks | .16% CTR



### THE HAWAIIAN ISLANDS

252,609 Impressions  
 281 Clicks  
 0.11% CTR

### MARRIOTT BONVOY

250,157 Impressions  
 521 Clicks  
 0.21% CTR



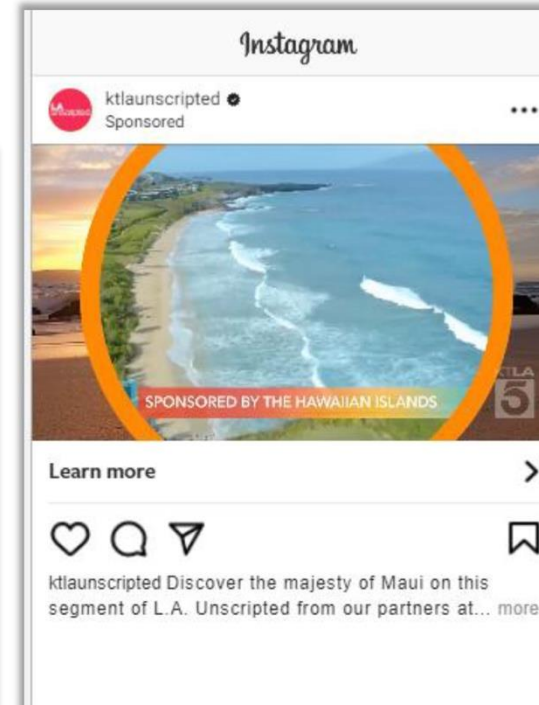
# LA Unscripted Maui

## SOCIAL BOOSTED POST SUMMARY

**TARGET:** Frequent Travelers & Users interested in Vacations, Tourism, and Travel  
**CTURL:** gohawaii.com

**Impressions:** 244,458 Impressions  
3,038 Clicks | 1.24% CTR

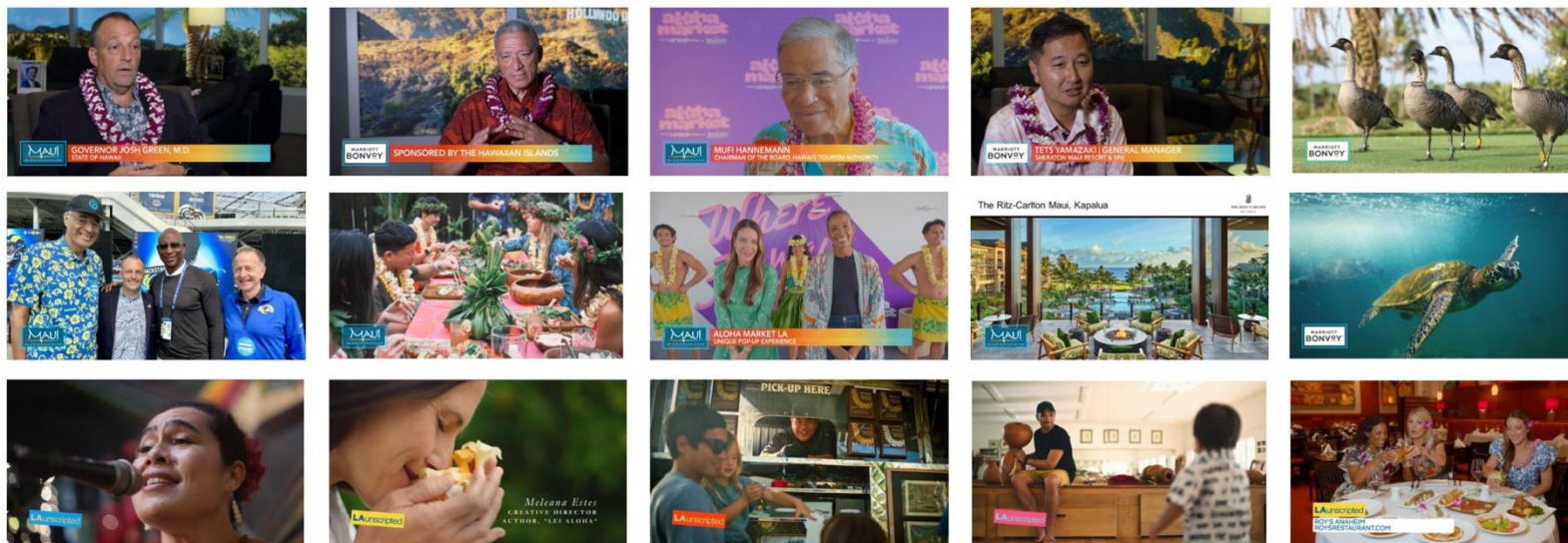
**Engagements:** 10,362  
**Engagement Rate:** 4.24%



# LA Unscripted Maui

## MAHALO!

Mahalo for trusting us with your business & your partnership!  
 It was sincerely a pleasure to work with all of you on this campaign.  
 We appreciate the effort & planning and look forward to future opportunities to work together. 🌺🕶️👍



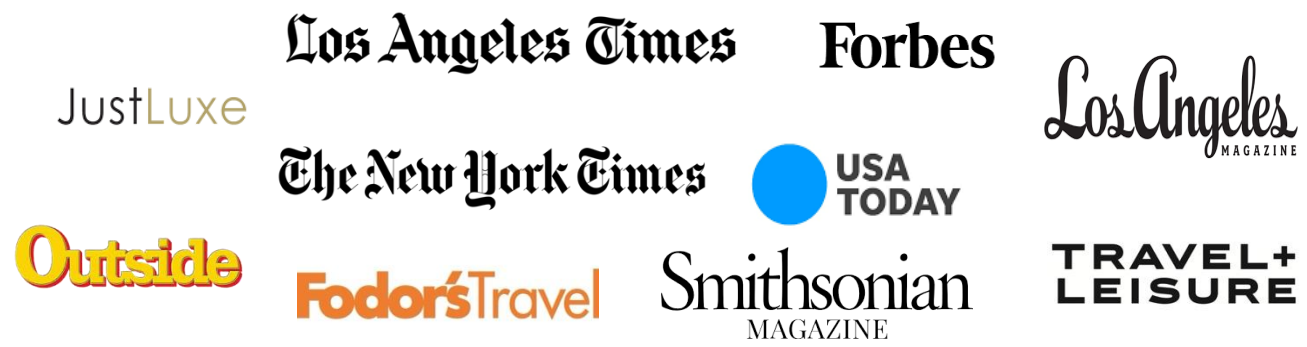
# Public Relations

## Media Blitz

- In-person meetings with 7 editors and freelance writers

## Results

- Worked with industry partners to co-host three media on Maui
- Confirmed a Maui episode for Tastemade's "From Scratch" to air Q1 2025



# Public/Private Partnership Programs

## Partner Contribution

Partners have:

- Redirected paid media investments to the Los Angeles market for the month
- Hosted and educated travel agents and group clients
- Conducted media blitzes
- Committed to supporting HTUSA-sponsored media visits with accommodations, meals, resort experiences and activities
- Offered attractive value propositions to stimulate visitor interest, such as complimentary night stays at hotels (3<sup>rd</sup>, 4<sup>th</sup>, 5<sup>th</sup> night free) and 20-25% off tours and transportation.

## Qualitative Measures

We have heard from hoteliers:

- A partner hotel hosted a travel trade educational webinar, inspired by the HTUSA program, attracting over 200 travel agents and achieving exceptional engagement.
- The HTUSA PR team collaborated with industry partners to present a cohesive brand story to media in the greater LA market. Following this initial outreach, industry partners are now conducting their own media appointments and receiving positive feedback on the activation.
- Recent reports from a hotel partner indicate a significant uptick in reservations for future months, starting in early October. This includes both strong short-term bookings and surprisingly active bookings for January through March.
- One hotel partner has reported exceeding their booking pace for Q1 2025, attributing this success to the campaign and their coordinated follow-up efforts.

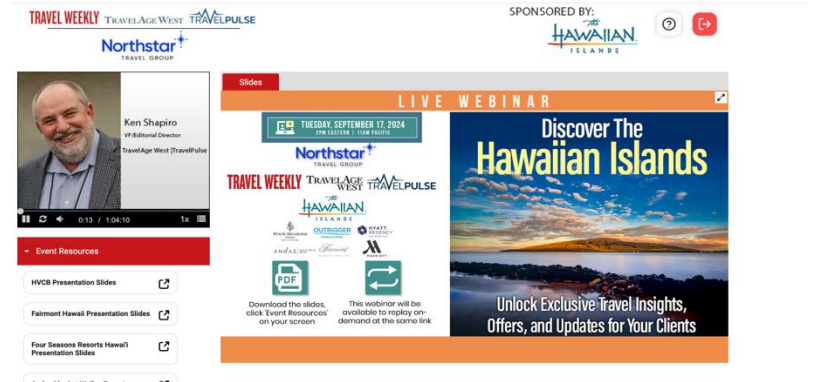
# Public/Private Partnership Programs

Action Tour Guide  
Alaska Airlines  
ALG Vacations  
'Alohilani Resort Waikiki Beach  
American Airlines  
Andaz Maui at Wailea Resort  
Aqua-ASTON Hospitality  
Aston Maui Hill  
Aston Kā'anapali Shores  
Aston at the Maui Banyan  
Aston Maui Kā'anapali Villas  
Aston Mahana at Kā'anapali  
Aston at Papakea Resort  
Aston at The Whaler on Kā'anapali Beach  
Battleship Missouri Memorial  
Blue Dolphin Charters  
Blue Hawaiian Helicopters  
CASTLE Kamaole Sands  
CASTLE Nāpili Surf Beach Resort  
Chase 'N Rainbows West Maui Condos  
CoralTree Residence Collection Hawai'i  
Courtyard O'ahu North Shore  
Espacio, The Jewel of Waikīkī  
Fairmont Hawai'i  
Fairmont Kea Lani  
Fairwind Cruises  
Four Seasons Resorts Hawai'i  
Four Seasons Resort Maui at Wailea  
Go City

Grand Hyatt Kauai Resort & Spa  
Grand Wailea  
Hawai'i Nautical  
Hawaii Tours  
Hawaiian Airlines  
HI Flying Dress Rental  
Hilton Hotels Hawai'i  
Hyatt Regency Maui Resort and Spa  
Hyatt Resorts in Hawai'i  
Kā'anapali Ali'i  
Kā'anapali Kai Golf Course  
Kapalua Villas Maui  
Kapalua Ziplines  
Leilani Farm Sanctuary  
MacNaughton Hospitality  
Mākena Surf  
Marriot Resorts Hawai'i  
Maui Alpaca  
Maui Chocolate Tour  
Maui Beach Hotel  
Maui Coast Hotel  
Maui Pineapple Tour  
Maui Seaside Hotel  
Mauna Kea Resort  
Montage Kapalua Bay  
Napili Kai Beach Resort  
NMG Network  
Outrigger Kā'anapali Beach

Outrigger Resorts Hawai'i  
Pleasant Holidays  
Polo Beach Club  
Polynesian Adventure Tours  
Renaissance Honolulu  
Road to Hāna Tours  
Romer House Waikiki  
Romer Waikiki at The Ambassador  
Royal Lahaina Resort  
Southwest Airlines  
Sheraton Maui Resort & Spa  
SpeediShuttle  
The Laylow Waikīkī, an Autograph Collection  
The Ritz-Carlton Maui, Kapalua  
The Royal Sonesta Kaua'i Resort  
The Surfjack Hotel & Swim Club  
The Twin Fin Hotel  
The Waikīkī Collection, Marriott Resorts Hawai'i  
The Westin Maui Resort & Spa, Ka'anapali  
Timbers Kaua'i  
Wailea Beach Resort  
Wailea Beach Villas  
Wailea 'Ekahi Village  
Wailea 'Ekolu Village  
Wailea 'Elua Village  
Wailea Grand Champions Villas  
Wayfinder Waikiki

# Travel Trade Education and Training





# HVCB Co-op and Partner Marketing



The most important time to visit Hawai'i is now.

View: [Grid](#) | [List](#) | Sort: [Recommended](#) | [Random](#) | [Near Me](#) | [Show Map](#)

Keyword  
Search  [🔍](#)

**Islands**

- Maui (31)
- Island of Hawai'i (6)
- Kaua'i (6)
- O'ahu (5)

**Categories**

- Accommodations (23)
- Activities (4)
- Transportation (4)

[Reset](#)

**Book 3 Nights and the 4th is on Us - The best things in life are free at The Westin Maui**

[📍 The Westin Maui Resort & Spa, Ka'anapali](#)

**Save up to 30% OFF**

[📍 Wailea Elua Village](#)

**Plan Ahead & Save 25%**

[📍 Maui Seaside Hotel](#)



*Mahala*

## **12b**

**Presentation and/or Discussion on the JATA  
Expo, Japan Mission and Other Updates from  
Hawai'i Tourism Japan (HTJ)**



HAWAII TOURISM

JAPAN

# JAPAN MARKET UPDATE

ERIC TAKAHATA

MANAGING DIRECTOR

11/21/2024



# ECONOMY

- Japan's GDP grew 0.9% annualized in the July-September
- Growth continues as the Bank of Japan plans gradual interest rate hikes
- Economy is switching from exports to consumer spending. Government expects tourism to be an important growth driver
- Politically stable under the Ishiba Cabinet, although the impact of the U.S. presidential transition is unclear
- The yen is likely to remain weak
- Japan's wealthy population is increasing (+2.6% in a 2021 survey)



# OUTBOUND TRAVEL & BOOKING PACE

- Number of Japanese departing in September was 69% vs. 2019 (+20.7% vs, 2023)
- The Honolulu Marathon has about 10,000 participants, 108% of last year's number
- The Central and Pacific League champions are scheduled to visit at year-end for the Japan Series
- Fuel costs have dropped from 22,000 yen to 16,000 yen one-way

## Year-end and New Year Booking

- airline booking rates :100-105% (vs. 2023)
- Travel agencies 110-130% (vs. 2023)

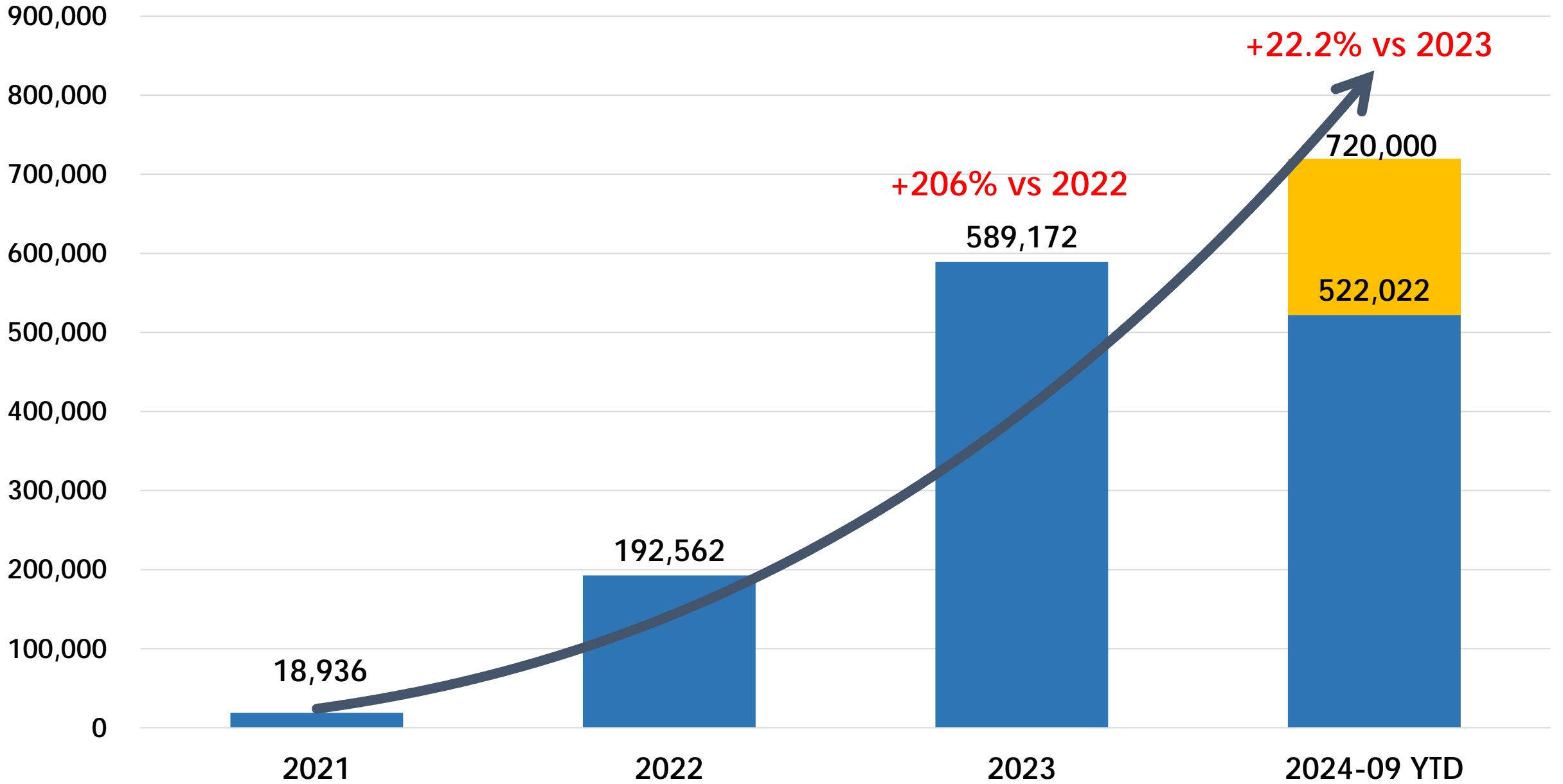
**Spring 2025 Booking:**110-120% (vs. 2023)

An aerial photograph of Honolulu, Hawaii, showing the city, coastline, and mountains. The text "HAWAI' INBOUND SITUATION" is overlaid in white, bold, sans-serif font. A white horizontal line is positioned below the text. The background features a clear blue sky with scattered white clouds, a vibrant turquoise ocean with white surf, and a dense urban area with numerous buildings and houses. In the distance, green mountains are visible under a bright blue sky.

# HAWAI' INBOUND SITUATION

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# JAPAN MARKET VISITOR ARRIVAL





# 2024 vs 2019 JAPAN MARKET VISITOR ARRIVALS (September YTD)

	2024 YTD	2019 YTD	Recovery % vs 2019
Total Spending (\$Million)	\$774.6	\$1,609.3	48.1%
Per Person Per Day (\$)	\$238.10	\$235.20	101.2%
Visitor Arrivals	522,021	1,152,900	45.3%
Visitor Days	3,253,593	6,843,530	47.6%
Length of Stay	6.23	5.94	104.9%

Source:

[https://www.japantravel.com/press-releases/2024/09/2024-vs-2019-japan-market-visitor-arrivals-september-ytd/](#)

# IMPACT TO TOURISM IN HAWAII – JAPAN MARKET

	Visitor Arrivals	Total Spending (\$mil.)	Per Person Per Day Average Spending (\$)	Tax Revenue (\$mil.)
2019	1,576,205	\$2,248.3	\$241.6	\$262.43
2022	192,562	\$359.4	\$235.4	\$41.69
2023	589,172	\$930.3	\$240.7	\$107.91
2024 (September YTD)	522,021	\$774.6	\$238.1	\$89.85
2024 Annual Forecast	717,173	\$1,070.5	\$241.9	N/A

Source: <https://www.hawaiitourismauthority.org/>

# PACKAGE COST COMPARISON

Jan 2025

Night	Hawai'i	Guam	Australia	Seoul	Taiwan	Bangkok	Paris	London	Los Angeles	Singapore
4NT	¥320,600	¥265,600	¥264,300	¥91,800	¥155,100	¥170,800	¥355,800	¥427,300	¥493,900	¥270,600
3NT	¥268,650	¥264,950	¥239,800	¥88,800	¥82,400	¥169,800	N/A	¥356,750	¥454,400	¥238,450

Feb 2025

Night	Hawai'i	Guam	Australia	Seoul	Taiwan	Bangkok	Paris	London	Los Angeles	Singapore
4NT	¥310,200	¥276,100	¥243,350	¥95,800	¥123,200	¥182,300	¥416,400	¥363,800	¥367,650	¥269,300
3NT	¥273,750	¥233,450	¥199,250	¥87,300	¥80,900	¥148,400	N/A	¥331,300	¥321,600	¥239,100





# HTJ INITIATIVE RECAP

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# YAPPARI HAWAI'I CAMPAIGN



- Out of Home Advertising (TV, Train station, Train, Taxi, Cinema)
- SNS, Digital Advertising
- BtoC Campaign
- Media Tie-up
- Family Promotion Video launch in December

**Over 768 million impressions**



# JAPAN MISSION

## Media Event (9/25)



## VIP Reception (9/25)



## Tourism EXPO Japan(9/26-9/30)



94 media Representatives  
18 stakeholders from Hawai'i

61 VIP guests  
110 total attendees

15,000 attendees  
Won No. 1 Travel Professionals'  
Choice Booth Grand Prize

# MADE IN HAWAI'I PROMOTION

Consumer Event



Made in Maui County Festival  
Exporting Made In Hawai'i Products to Japan Seminar



Pop-up/Antenna Shop



Support events that promotes made in Hawai'i products

4 distributor and 2 department store reps.  
Meeting with festival vendors  
100 seminar attendees (with DBEDT)

Aloha Market by Mana Up Hawai'i  
@ Haneda Airport (Feb. 2025)  
HIS Antenna Shops



# 2025 STRATEGIES

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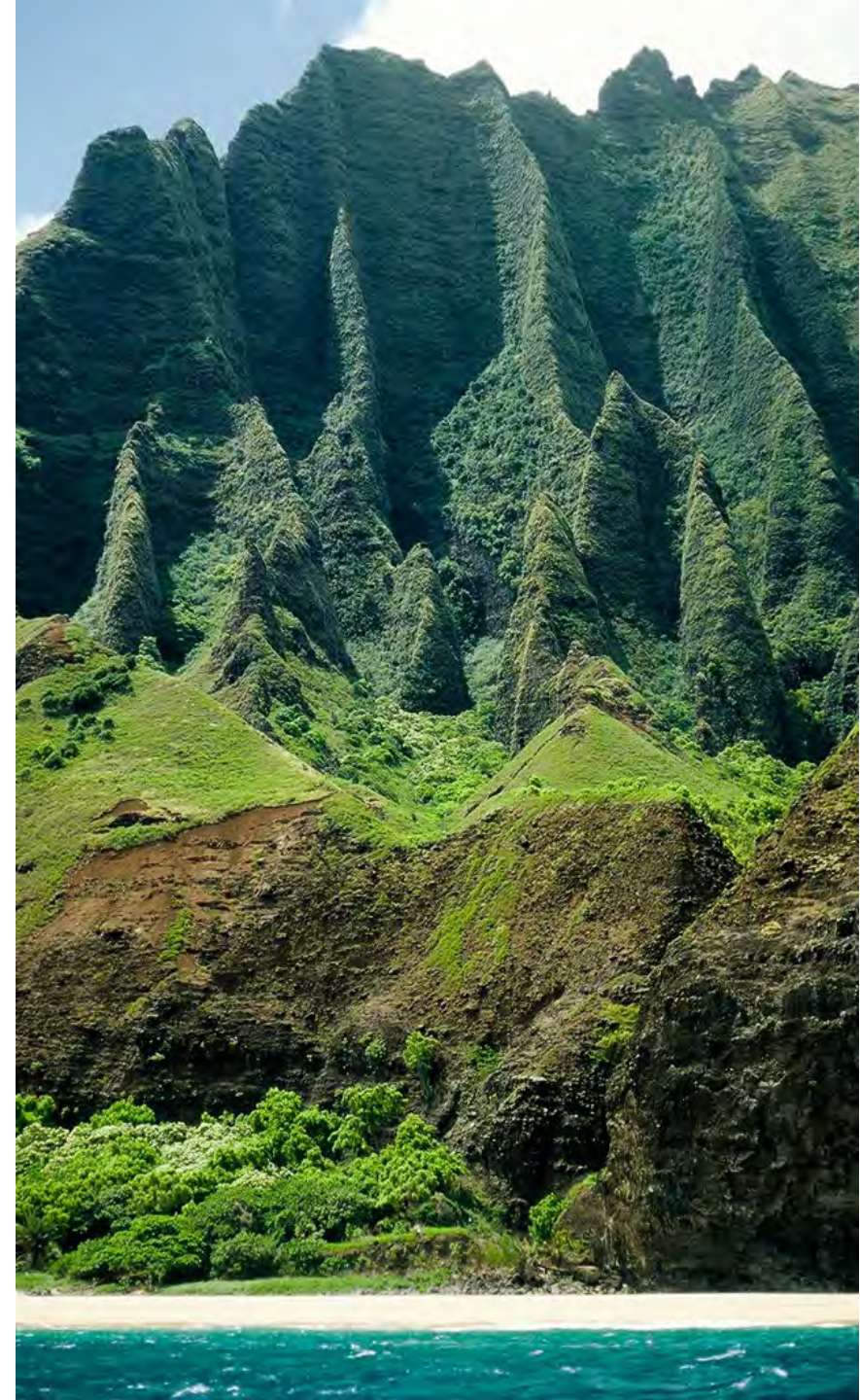
# SHORT-TERM STRATEGY

- Advertising promotion campaigns through partnerships with companies in the travel industry, and stimulating travel demand through media outreach and distribution
- Increase booking pace through collaboration with airlines, travel agencies, and OTAs
- Increase high value traveler initiatives
- Promote the attraction of MICE groups through collaboration with Meet Hawai'i
- Destination education and product development support within the travel industry



# MID-LONG TERM STRATEGY

- Attract first-time visitors
- Continue initiatives targeting the youth market
- Strengthen the branding of each island
- Strengthen digital content marketing
- Increase high value traveler initiatives
- Further initiatives to attract the hula market
- Hawai'i as a hub of education, expanding educational tourism



## **12c**

**Update on the Partnership with Brand USA  
and other International Marketing Activities**



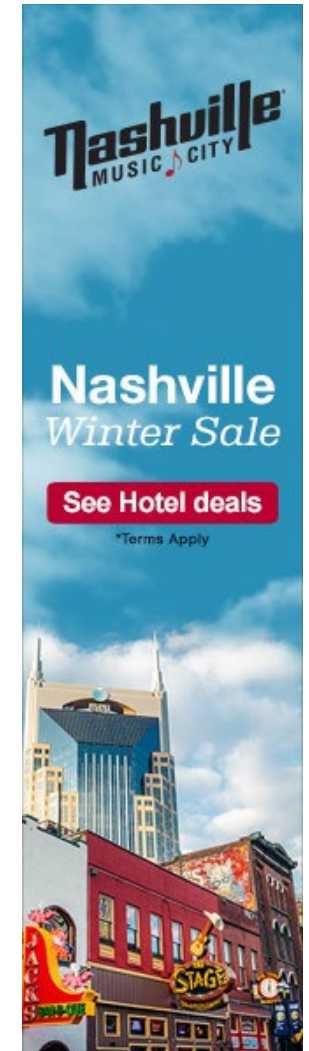
# **Brand Standing Committee Meeting**

**11/21/2024**

**Agenda #7 : Brand USA Partnership and Other  
International Marketing Activities**

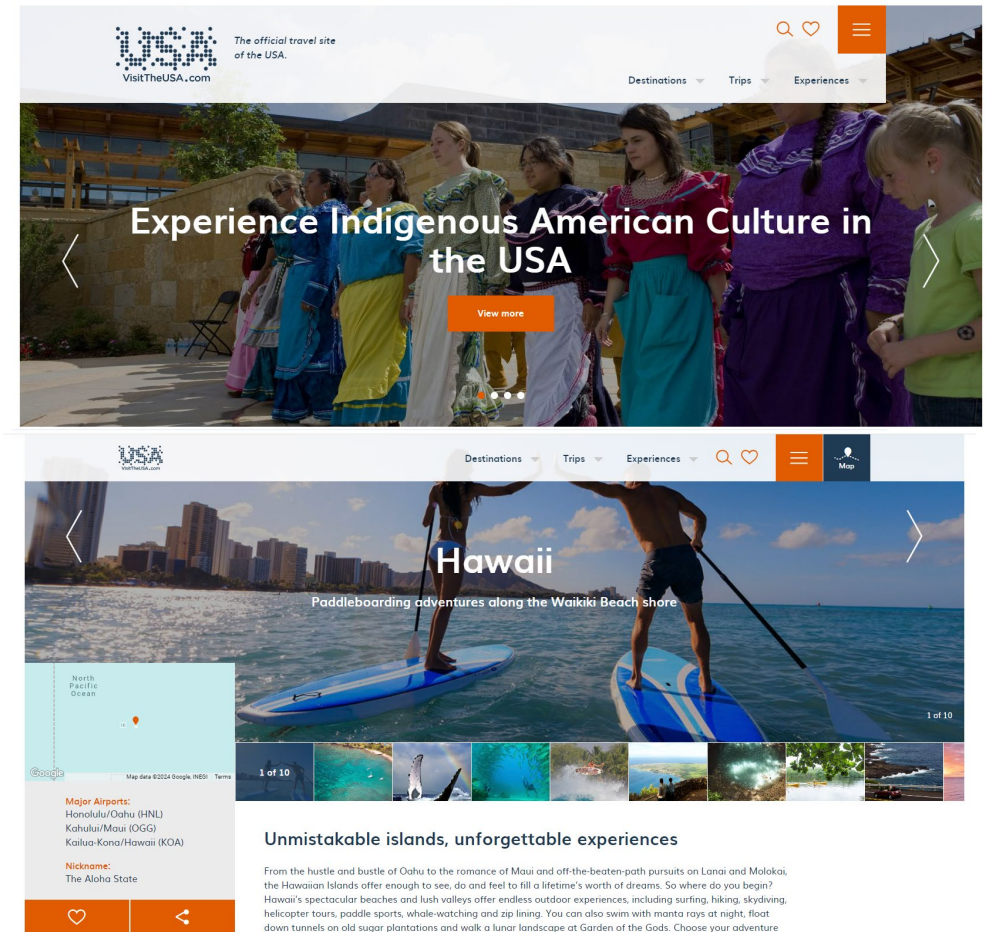
# Brand USA x Expedia Promotion

- **Purpose:** to boost short-term bookings to Hawai'i
- **Promotional Period:** 11/22/24 - 3/31/25
- **MMAs:** Japan, Canada, Oceania
- **Matching:** Brand USA 20%+Expedia 40%
- **Industry Support:** special offers by hotels/activities/airlines



# Brand USA – Website Update

- **Purpose:** to provide the most current and relevant information aligned with HTA’s regenerative tourism.
- **VisitTheUSA.com:** official global site accessible in 16 international markets and 8 languages.
- **Updates:**
  - Refresh: State, O’ahu, Maui, Kaua’i
  - Create: Hawai’i Island, Lāna’i, Moloka’i



# IPW 2025: June 14 – 18 Chicago

- **Purpose:** to conduct business, build relationships and fortify connections with international travel buyers and media
  - Pre-Scheduled Business Appointments
  - Media Marketplace
  - Networking Events



**1,000+**

**U.S. SUPPLIER ORGANIZATIONS**  
representing all regions & industry segments

**1,100+**

**TRAVEL BUYERS**  
from more than 60 countries

**500+**

**TRAVEL JOURNALISTS**

# **13**

**Motion, Discussion, and Action to  
Create an HTA Governance Study Permitted  
Action Group for the Purpose of Addressing the  
Issues Outlined in the Governance Study  
Deliverables Reports and Final Report  
Recommendations**





## **STAFF REPORT TO THE BOARD**

October 15, 2024

### **AGENDA NO. 6**

*Motion, Discussion, and Action to Create an HTA Governance Study Permitted Action Group for the Purpose of Addressing the Issues Outlined in the Governance Study Deliverable Reports and Final Report Recommendations*

### **REPORT:**

The Governance Study PIG Reported at the October 3, 2024, Regular Board Meeting their recommendations including:

- Create a new Governance Study PIG.
- The purpose of the PIG will be to:
  - Address the issues
  - Address the final report recommendations
- This new PIG is to report to the Board prior to the 2025 Legislative session.

### **RECOMMENDATION:**

A Motion to Approve the Creation of an HTA Governance Study Permitted Interaction Group (PIG).

October 11, 2024

## **Final Recommendation Report of the Governance Study PIG**

Aloha Board Members:

The PIG convened a meeting virtually on July 15, 2024, to discuss the next steps regarding the Governance Study Report.

**Your Governance Study PIG is pleased to report to the Board the following recommendations:**

- Create a new Governance PIG
- The current four board members remain on the new PIG and additional board members may be added
- The purpose of the PIG will be to:
  - Address the issues outlined in the deliverable reports
  - Address the final report recommendations
- Work in collaboration with Daniel Nahoopii in his capacity as interim President and CEO to lay out a plan to include a timeline and milestones to address these issues and report to the PIG or committee
- This new PIG to report to the Board prior to the 2025 Legislative session
- The committee recommends the full board through its Chair to initiate a press release to identify our path forward on the Governance Study.

# **14**

## **Motion, Discussion and Action to Adopt a Board Resolution for the Delegation of Authority to Present Policy Positions**



## **STAFF REPORT TO THE BOARD**

October 15, 2024

### **AGENDA NO. 8**

*Motion, Discussion, and Action to Adopt a Board Resolution for the  
Delegation of Authority to Present Policy Positions*

#### **REPORT:**

The Board approved and adopted Resolution No. 2023-3 at its October 26, 2023, Regular Board Meeting. This resolution is valid through the calendar year 2024.

This resolution authorizes its President and CEO or its designee, and/or its Board Chair or its designee to represent the authority in communications with the Governor and the Legislature, including but not limited to the positions noted below, on behalf of the Authority during Calendar Year 2024 before all branches of the federal, state, and county governments.

#### **RECOMMENDATION:**

The staff recommends retaining the language of this resolution with modifications for the time period and deletion of bullet point 3, which is no longer applicable.

A Motion to Adopt Board Resolution Delegation of Authority to Present Policy Positions.

October 11, 2024

**HANDOUT:**

**Agenda 08**

*Motion, Discussion and Action to Adopt a Board Resolution for the Delegation of Authority to Present Policy Positions*

From Board Member James McCully:

Based on the 2024 bills that ended up having a consequential effect on HTA, I believe we need(ed) more direct representation. I suggest that the Resolution specify additional representation to make sure we have fewer issues with legislative oversight.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Directors hereby authorizes its President and CEO or its designee, and/or its Board Chair or its designee, and/or the members of the Legislative Permitted Interaction Group in coordination with the CEO to represent the authority in communications with the governor and the legislature including but not limited to the positions noted below.



# Resolution

No. 2023-3

## DELEGATION OF AUTHORITY TO PRESENT POLICY POSITIONS

**WHEREAS**, the Powers and Duties of the Hawai'i Tourism Authority in HRS §201B-3(a)(6) provide that the authority may, "Through its president and chief executive officer, represent the authority in communications with the governor and the legislature"; and,

**WHEREAS**, legislation may be introduced at the federal, state, and county level which may impact the strategic mission and statutory purpose of the Hawai'i Tourism Authority and, as such, HTA may require testimony or other information to present its policy positions of the authority in the appropriate forum; and,

**WHEREAS**, the Board of Directors seeks greater flexibility and autonomy in order to address the complex emerging issues of the market, industry and community, in return for pledging greater accountability.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Directors hereby authorizes its President and CEO or its designee, and/or its Board Chair or its designee to represent the authority in communications with the governor and the legislature including but not limited to the positions noted below, on behalf of the Authority during Calendar Year 2024 before all branches of the federal, state and county governments. This is provided that the positions are aligned and consistent with Hawai'i Revised Statutes chapter 201B, the Hawai'i Tourism Authority Strategic Plan 2020-2025, Destination Management Action Plans, and any other policies, plans or budgets approved by the Authority and this Resolution:

- HTA actively supports West Maui's economic recovery following the devastating August 2023 wildfires. The Authority's responsibility in promoting and maintaining Hawai'i's brand is best effectuated through supporting and amplifying the Governor's policies and directions with an emphasis on messaging to travelers considering Maui as a destination to be mindful and supportive of the process underway as the community heals and manages their recovery.
- HTA will support legislation and take positions to support an annual deposit of the transient accommodations tax, or other funding, into a special fund administered by HTA as a means to carry out its stated priorities.

- HTA is engaged in a governance study that will provide background, guidance, and actionable recommendations in regards to amending HRS §201B to reflect the changes that have occurred in Hawai'i as well as the tourism economy since its adoption. Delivery of the study is scheduled for June 2024 providing sufficient time to develop legislation for the 2025/26 biennium. HTA supports all input and perspectives and will be engaged with the Legislature as this study develops through the upcoming Legislative session. In the interim HTA will support legislation that further defines or establishes its responsibility for destination management and stewardship (see HRS201B-7(b)) or that would enhance it's effectiveness in implementing HRS201B.
- HTA will support legislation and take positions to support the reestablishment of an appropriation ceiling and increased funding for the Convention Center Enterprise Special Fund to enable the expenditure of funds for the operations and repair and maintenance of the Hawai'i Convention Center.
- HTA will review and comment on all proposed taxes and fees which impact tourism, and will study the potential effects of increased taxes and fees on visitor demand and tourism management efforts.
- HTA is guided by and will support its Strategic Plan 2020-2025 and the principles and values represented under the concept of Mālama Hawai'i.

**BE IT FURTHER RESOLVED**, that the Board of Directors elects that any official positions taken by the Chair, the President and CEO and/or their designee on issues before federal, state and county governments not previously approved by the board shall be communicated to board members as soon as practicable, and presented at the next regular board meeting of the Authority; and,

**BE IT FINALLY RESOLVED**, that copies of this resolution be transmitted to the President & CEO, Board Chair, Board Members and Chief Administrative Officer.

As adopted on this 26 day of October 2023  
By the Board of Directors




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**Blaine Miyasato**  
Board Chairperson




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**Daniel Nahoopii**  
Interim President & CEO




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**John Cole**  
Deputy Attorney General

# **15**

## **Discussion on the Membership of Standing Committees and Permitted Interaction Groups**





## STANDING COMMITTEES

### **Administrative & Audit Standing Committee** (Quorum: 4 members)

*Adopted November 18, 2021; July 28, 2022; March 30, 2023; August 31, 2023*

*The purpose of this standing committee is to review existing policies, make findings and recommendations to modify, create, amend and/or replace existing policies relating to the administration of the Authority; and establish criteria and make recommendations related to the evaluation of the President & Chief Executive Officer. The committee shall also be responsible for the establishment and the proper execution of internal audit controls by (i) consulting with the Authority’s external auditors to determine whether the internal controls have been properly executed; (ii) ensuring that financial statements are timely prepared and accurate, and that the statements will properly report financial information necessary for the fiscal operation of the Authority; and, (iii) establish and enforce a code of conduct to ensure the financial integrity of the Authority’s management of public funds. The committee shall also be responsible for matters relating to legislative and governmental affairs.*

<b>Mike White, Chair</b>	<b>Mufi Hannemann, Vice Chair</b>
David Arakawa	Jimmy Tokioka (ex officio)
Mahina Paishon	Vacant
<b>HTA Staff: Daniel Nahoopii, Isaac Choy</b>	

### **Branding Standing Committee** (Quorum: 4 members)

*Adopted November 18, 2021; July 28, 2022; August 31, 2023; October 26, 2023; February 29, 2024; July 8, 2024; **October 3, 2024***

There is established a *Branding Standing Committee* that shall be responsible for the review, evaluation, and recommendation of the Authority’s branding, marketing, and messaging initiatives, programs, and/or activities which support the Authority’s vision, mission, goals, and objectives including meetings, conventions, and incentive business.

<b>Blaine Miyasato, Chair</b>	Mufi Hannemann
Kimberly Agas	Roy Pfund
David Arakawa	Chris West <i>(added 10/3/24)</i>
<b>HTA Staff: Daniel Nahoopii</b>	



**Budget, Finance, and Convention Center Standing Committee** (Quorum: 4 members)

*Adopted November 18, 2021; July 28, 2022; August 31, 2023; **October 3, 2024***

*The purpose of this committee is to review the Authority’s financial reports, investments, annual budget, and other budget and finance related matters, including the Convention Center. The committee shall, in conjunction with the Authority’s staff, be responsible for the development and monitoring of the Authority’s annual budget. The committee shall review the Authority’s financial reports, inclusive of the Convention Center, and other budget and finance-related matters, and make recommendations to the Board. The committee shall also be responsible for the long-term strategic planning for the Hawaii Convention Center, including capital improvement plans, facility modernization efforts, and facility management.*

<b>David Arakawa, Chair</b>	<b>Kimberly Agas, Vice Chair</b>
Jim McCully	Blaine Miyasato
Roy Pfund <i>(added 10/3/24)</i>	Jimmy Tokioka (ex-officio)
<b>HTA Staff: Isaac Choy</b>	

**Ho’okahua Hawaii Standing Committee** (Quorum: 4 members)

*Adopted November 18, 2021; July 28, 2022; August 31, 2023; July 8, 2024; **October 3, 2024***

*The purpose of this committee is to develop, review, evaluate, monitor, report, and provide recommendations on issues relating to natural resources, Hawaiian culture, and community.*

<b>Mahina Paishon, Chair</b>	Stephanie Iona
Kimberly Agas	Chris West <i>(added 10/3/24)</i>
Mufi Hannemann	<b>Vacant</b>
<b>HTA Staff: Kalani Kaanaana, Caroline Anderson</b>	



## INVESTIGATIVE COMMITTEES (PIG)

### **Governance Study Permitted Interaction Group (PIG)**

*Adopted May 9, 2023; July 27, 2023*

The purpose of this investigative committee is to develop the governance, strategic organization, and Business Review Process Study for the HTA.

<b>Stephanie Iona (Co-Chair)</b>	<b>Mahina Paishon (Co-Chair)</b>
David Arakawa	Jim McCully
<del>Sherry Menor-McNamara</del>	
HTA Staff: Daniel Nahoopii	

### **2024 Legislative Permitted Interaction Group (PIG)**

*Adopted September 24, 2015; May 30, 2019; January 28, 2021; November 18, 2021; July 28, 2022; January 26, 2023; September 28, 2023*

The purpose of this investigative committee is to develop policy positions and legislation for the 2024 Legislative Session.

<b>Jim McCully (Chair)</b>	<del>Sherry Menor-McNamara (Vice Chair)</del>
Mahina Paishon-Duarte	Stephanie Iona
Blaine Miyasato	Mike White
HTA Staff: Daniel Nahoopii, Kalani Kaanaana, Ilihia Gionson, Isaac Choy, Caroline Anderson	

### **Budget, Finance, and Convention Center Permitted Interaction Group (PIG)**

*Adopted September 28, 2023*

*The purpose of this investigative committee to be determined at it's first meeting.*

<b>David Arakawa (Chair)</b>	<b>Kimberly Agas (Vice Chair)</b>
Jim McCully	Stephanie Iona
Blaine Miyasato	Mike White
HTA Staff: Daniel Nahoopii, Isaac Choy	

### **CEO Search Permitted Interaction Group (PIG)**

*Adopted July 25, 2024*

The purpose of this *CEO Search Permitted Interaction Group (PIG)* is to assist in the selection process for the position of President and CEO of the Hawai'i Tourism Authority.

Kimberly Agas	David Arakawa
Stephanie Iona	Jim McCully
Mahina Paishon	Mike White
HTA Staff: TBD	