

HAWAII TOURISMTM

AUTHORITY

2019 Annual Report to the Hawai'i State Legislature

TABLE OF CONTENTS

Message From The President & CEO	2
A New Vision For HTA	3
HTA Board Of Directors	5
Overview Of HTA	6
Measures Of Success	7
HTA's Pillars	7
Pillar I: Natural Resources	8
Pillar II: Hawaiian Culture	11
Pillar III: Community ENRICHMENT	14
Pillar IV: Brand Marketing	24
Sports Marketing	46
Budget And Finances	52
Hawaii Convention Center	53
Tourism Research and Planning	57
Programs	57
Hawai'i Visitor Statistics	58
Statewide and by Island	58
Global Source Markets	59
Communications	61
Tourism Updates	63
HTA Team	64

MESSAGE FROM THE PRESIDENT & CEO

Aloha kākou,

We share this annual report for 2019 with you, our partners in the Hawai'i State Legislature. Our team values your support, appreciates your input and welcomes your views on how the Hawai'i Tourism Authority can better serve the needs of our tourism industry and the residents of our state.

We began 2019 with new leadership determined to find the right balance between marketing the Hawai'i brand and managing the destination. Our primary focus is on attracting higher-spending visitors rather than on growing visitor numbers.

HTA is guided by four pillars which are: natural resources, Hawaiian culture, community, and brand marketing. Our mission is 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.

We strive to manage tourism in a way that helps improve the quality of life for residents and communities across the state. In 2019, through support from the Legislature, we funded hundreds of events and nonprofit organizations across the state. In 2020, we will work diligently to continue growing the number of events and programs which focus on and benefit our natural resources, Hawaiian culture, and community.

We will continue to work with the Legislature and other state agencies to support initiatives that are in alignment with our overall mission. We believe that by working collaboratively and cooperatively, we will be able to improve the overall visitor experience and the quality of life for our residents.

With warmest aloha,



Chris Tatum
President & CEO
Hawaii Tourism Authority

A NEW VISION FOR HTA

Our Kuleana

- As a state-funded entity, the Hawai'i Tourism Authority's kuleana is to manage tourism for the State of Hawai'i in a way that helps improve the quality of life for residents, families and communities on all islands.
- The welfare of the Hawaiian Islands, both for today – and especially for the future – is what matters most in how we fulfill HTA's mission. Our overriding objective is for HTA to make a positive, lasting impact for Hawai'i through the tourism industry.
- We are responsible, first and foremost, for protecting the iconic brand of the Hawaiian Islands. This includes perpetuating Hawaiian culture, preserving Hawai'i's natural environment, and strengthening communities by supporting programs kama'āina treasure and visitors enjoy.
- We are also responsible for guiding the direction of Hawai'i tourism to support the economic vitality of the state, and each individual island. Tourism's revenue provides jobs, supports businesses and creates opportunities for kama'āina of all generations to grow and prosper.

Fulfilling Our Mandate

- Hawai'i's tourism industry generates the funding for HTA, which is allocated by the state legislature. HTA works closely with our partners in the legislature, as well as the tourism industry, to ensure our mission is being fulfilled with the state's best interests in mind.
- Enhancing resident sentiment is dependent on kama'āina appreciating the connection between tourism and how we live in Hawai'i. Ensuring that the community understands how tourism is funded and ultimately supports programs and services that affect their quality of life is critical to our mission.
- Kama'āina are vital to the quality of the visitor experience.
- We are implementing new communication strategies to bring greater awareness to the projects, individuals and organizations supported in communities statewide through our Kūkulu Ola, Aloha 'Āina and Community Enrichment programs.
- We are completely transparent with how our budget is being utilized and will provide clear information to lawmakers, industry partners, media and the general public as to our funding allocation. Allocations are made only after a rigorous vetting process of each line item.

- Our marketing efforts are focused on working with contractors in key markets worldwide who share our commitment to attract high value visitors while staying true to Hawai'i's brand. All contractors are retained after going through a detailed RFP process to ensure the marketing of Hawai'i's brand is being handled by effective, experienced experts whose strategies, tactics and mindset are aligned with HTA's kuleana.
- We continue to review the value of our sports sponsorships, as well as our support of major festivals and signature events to ensure they are producing results benefiting our communities while also supporting tourism.
- We are transforming the sales process to market the Hawai'i Convention Center with the goal of hosting more city-wide conventions, which will strengthen tourism's base of business on a broad scale. Our new sales and marketing process will be a centralized and collaborative effort with the industry and hotel partners.
- We placed added emphasis on key initiatives where support is needed most. For example:
 - Helping the island of Hawai'i to recover from the ongoing downturn in visitors and travel demand due to the Kilauea volcano eruption last summer
 - Reinvigorating the travel market from Japan and other high value markets.
 - Stepping forward to help keep the Pearl Harbor Historic Sites open during the five-week partial government shutdown by encouraging industry partners to fund daily operations of these sites.

Our Importance to Hawai'i

- Hawai'i represents many qualities to many people – both kama'āina and visitors. Within the global travel community, Hawai'i's brand is strong, appealing and widely recognized, and is the biggest reason why the Hawaiian Islands are in such great demand by travelers worldwide.
- The strength of Hawai'i's brand is weighed differently by different audiences, often depending on a personal experience with the destination or particular point of interest, such as culture, the environment, diversity or social relationships.
- To kama'āina, the significance of Hawai'i's brand is summed up in four words: "This is our home."
- That's why HTA's effort to holistically manage tourism (our kuleana) is so important to Hawai'i's future.

HTA BOARD OF DIRECTORS

HTA's Board of Directors is a policy-making entity comprised of 12 members, appointed by the Governor of Hawai'i, who serve as volunteers and meet monthly to guide the agency's work on behalf of the State of Hawai'i. Board approval is required for key HTA functions and initiatives, including its annual budget and annual marketing plan, which includes funding support of community programs.

Mr. L. Richard Fried Jr., Chair

Founding Member

Cronin Fried Sekiya Kekina & Fairbanks
Attorneys at Law

Mr. Micah Alameda

Assistant General Manager

Nā Leo o Hawai'i

Mr. David Z. Arakawa

Executive Director

Land Use Research Foundation of Hawai'i

Mr. Fred Atkins

Managing Partner

Kaua'i Kilohana Partners

Mr. Daniel Chun

Director of Sales, Community & Public

Relations – Hawai'i

Alaska Airlines

Mr. George Kam

Ambassador of Aloha

Ms. Kyoko Kimura

Director-Owner Relations

Aqua-Aston Hospitality

Ms. Ku'uipo Kumukahi

Hawaiian Culture Manager

Hyatt Regency Waikīkī

Ms. Sherry Menor-McNamara

President & CEO

Chamber of Commerce Hawai'i

Mr. Benjamin Rafter

CEO

OLS Hotels & Resorts

Mr. Kelly Sanders

Vice President of Operations

Highgate

Ms. Kimi Yuen

Principal/Planner

PBR Hawai'i & Associates, Inc.

OVERVIEW OF HTA

The Hawai'i Tourism Authority was established in 1998 through a legislative act to serve as the state's lead agency supporting tourism, Hawai'i's largest industry. The same act also established the Tourism Special Fund. A portion of the money collected from the Transient Accommodations Tax (TAT), which people pay when they stay in legal accommodations in Hawai'i, funds HTA's community-focused programs, brand marketing and destination management initiatives. In addition to its legal responsibilities, HTA strives to:

- Support efforts to address broad tourism issues
- Lead the visitor industry in supporting a strong economy
- Place the interests and benefits of residents first
- Serve as a source for information on tourism market research
- Educate visitors about traveling responsibly



Sharing the do's and don'ts with visitors is the goal of the Kuleana Campaign, launched in 2019 through a partnership between HTA and the Hawai'i Visitors and Convention Bureau (HVCB). It includes short videos that are aimed at curbing some of the challenges each county is facing, such as ocean safety, ocean conservation, culture, land safety, astute renting, and pono tourism.



Chris Tatum, Senator Glenn Wakai, Mufi Hannemann and Representative Richard Onishi took part in a Japan Hawai'i Travel Association panel session on the "Future of Hawai'i Tourism" in August 2019. (Also pictured, emcee Kim Gennaula and JTB Hawai'i President & CEO Keith Kitagawa)

MEASURES OF SUCCESS

HTA no longer uses its Five-Year Strategic Plan (2016-2020) goals and measures to benchmark its success. Starting in 2019, HTA measures its success by the following Key Performance Indicators (KPIs):

- Resident satisfaction
- Visitor satisfaction
- Average daily visitor spending
- Total visitor spending



HTA'S PILLARS

HTA is guided by four pillars which are: natural resources, Hawaiian culture, community enrichment, and brand marketing. Its mission is 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.

- Natural Resources
- Hawaiian Culture
- Community
- Brand Marketing



PILLAR I: NATURAL RESOURCES

Aloha ‘Āina Program

The Aloha ‘Āina program funds community-based nonprofit and government programs helping to manage and protect Hawai‘i’s natural resources. HTA is increasing the amount of money allocated to the program and the number of awardees for 2020. In calendar year 2019, the State funded 28 projects statewide. These included:

Hawai‘i Island

The Kohala Center, Inc.

Uku Ko‘ako‘a: The restoration and conservation of a situated coral

www.kohalacenter.org

Big Island Resource Conservation and Development Council

Managing High-Profile Invasive Species in Hawai‘i’s Landscape

www.bigislandrcd.org

KUPA Friends of the Ho‘okena Beach Park

Incorporating the practices of mālama ‘āina into the visitor experience

www.hookena.org

Nā Mamo O Kāwā

Kāwā Dryland Forest and Coastal Revegetation Project

www.nmok.org

Pōhāhā I Ka Lani

Lehua Lulu‘u Pali

www.pohahaikalani.com

Kalanihale

Building the Next Generation of Resource Stewards in Miloli‘i

www.kalanihale.com

Coral Reef Alliance

Launching a Quality Assured Citizen Science Program to Inform Water Quality Solutions that Benefit Coral Reefs and Communities

www.coral.org

Kaua‘i County

Garden Island Resource Conservation & Development, Inc.

Voluntourism To Save Kōke‘e’s Native Forests

www.gircd.org

Maui County

Moloka‘i Land Trust

Anapuka Critical Habitat Restoration for Ground Nesting Seabirds and Endangered Species

www.molokailandtrust.org

Ma Ka Hana Ka ‘Ike Building Program

Wailua Nui Restoration Project

www.hanabuild.org

Coral Reef Alliance

Engaging community volunteers to support restoration actions that reduce land-based pollution threats to West Maui coral reefs

www.coral.org

The Nature Conservancy

Local Action for Effective Management of Priority Coral Reefs in Maui Nui

<https://www.nature.org/en-us/about-us/where-we-work/united-states/hawaii/>

Maui Nui Botanical Gardens Inc.

Seed Storage of and Community Access to Maui Nui Native Plants

www.mnbg.org

Friends of Auwahi Forest Restoration

Ho‘okumu ulu lā‘au ‘ōiwi Auwahi; continued restoration of a wahi pana forest

www.auwahi.org

Maui Nui Marine Resource Council, Inc.
 Monitoring and Protecting Ocean Water Quality
 Along Maui's South and West Shores to
 Benefit Coral Reef Health
www.mauireefs.org

**O'ahu
 Hawai'i Marine Mammal Alliance Inc.**
 Stewardship of the Hawaiian Monk Seal
h-mar.org

Mālama Nā Honu
 Mālama Nā Honu Education & Protection
 Program 2019
www.malamanahonu.org

**O'ahu Nā Ala Hele Trails and Access
 Program, Division of Forestry and Wildlife**
 Mānoa Falls Trail Improvement Project: Phase
 Three
hawaiitrails.hawaii.gov

**Department of Land and Natural Resources
 - Division of Forestry & Wildlife (DLNR-
 DOFAW), Urban & Community Forestry
 Program**
 Hālau 'Ōhi'a Environmental Stewardship
 Training for O'ahu
dlnr.hawaii.gov/dofaw/



Voluntourism to save Kōke'e's native forests
 on Kaua'i

**The North Shore Community Land Trust
 dba North Shore Community Land Trust**
 Kahuku Point Restoration
northshoreland.org

**State of Hawai'i, Department of Land and
 Natural Resources, Division of Forestry and
 Wildlife**
 O'ahu Offshore Island Wildlife Sanctuaries
 n/a

Hui o Ko'olaupoko
 Mālama Muliwai o He'eia
www.huihawaii.org

Division of State Parks
 Ka'ena Point Coastal Stewardship Project
dlnr.hawaii.gov

Hika'alani
 Ho'okanaka III
www.hikaalani.website



Laysan albatross chick - North Shore
 Community Land Trust on O'ahu



Friends of Auwahi Forest Restoration Project

Auwahi, a forest located on the southwest slopes of Haleakalā, is one of the last representatives of a nearly lost, biologically and culturally unique Hawaiian forest. Restoring native forests at Auwahi improves watershed functions and decreases erosion and sediment transfer to coral reefs. Tourism dollars are helping to fund the project, providing residents and visitors an opportunity to help restore the forest.

DLNR: Nā Ala Hele Trails and Access Program

One of the most popular hiking trails on O‘ahu, Mānoa Falls Trail, was closed on-and-off for four months over the summer and fall to undergo major work on the upper part of the trail. Tourism dollars are helping to pay for those much-needed improvements. Kalani Ka‘anā‘anā, HTA’s Director of Hawaiian Cultural Affairs, spoke during a press conference to announce this.



PILLAR II: HAWAIIAN CULTURE

Kūkulu Ola

The Kūkulu Ola program funds community-based nonprofits which represent cultural practitioners, craftsmen, musicians and artists committed to perpetuating the Hawaiian culture. HTA is increasing the amount of money allocated to the program and the number of awardees for 2020. In calendar year 2019, the State funded 28 projects. These included:

Hawai'i Island

Edith K. Kanaka'ole Foundation
Waiho'olu'u
www.edithkanakaolefoundation.org

Pōhōhā I Ka Lani
Mālama Waipi'o Valley
www.pohahaikalani.com

Kohala Institute
'Āina-based Learning in the Iole Ahupua'a
www.kohalainstitute.org

'Aha Kāne - Foundation For The Advancement of Native Hawaiian Males
Ho'okahua Project
www.ahakane.org

Hui Mālama Ola Nā 'Ōiwi
Hui Mālama Ola Nā 'Ōiwi Traditional Health Program
www.hmono.org

The Kohala Center, Inc.
Waiwai: The Kohala Mountain Music Project
www.kohalacenter.org

Kaua'i County

Kekahu Foundation, Inc. dba KKCR
Studio Moisture Mitigation and Acoustic Dampening
www.KKCR.org

County of Kaua'i - OED
Ka Leo O Nā Kupa – Ni'ihau Language Preservation Program
www.kauai.gov

Maui County

Ma Ka Hana Ka 'Ike Building Program
Ho'i Iā Hāloa
www.hanabuild.org

Unda Kava 808, Inc.
Introduction to Makahiki Games
www.undakava808.weebly.com

Maui Nui Botanical Gardens, Inc.
Promoting Visitor and Community Connection to Traditional Hawaiian Crops
www.mnbg.org

KHM International dba Ka Honua Momona
Mahuaola o Moloka'i
www.kahonuamomona.org

Hui No'eau dba Hui No'eau Visual Arts Center
Hui No'eau Art with Aloha 2019
www.huinoeau.com

O'ahu

Kalihi-Palama Culture & Arts Society, Inc.
44th Annual Queen Lili'uokalani Keiki Hula Competition
www.kpcahawaii.com
www.keikihula.org

The Hawaiian Mission Children's Society dba Hawaiian Mission Houses Historic Site and Archives
Special Tours at Hawaiian Mission Houses
www.missionhouses.org

Bishop Museum

Living Hawaiian Culture: A Platform for Cultural Practitioners at Bishop Museum

www.bishopmuseum.org

Kōkua Kalihi Valley (Comprehensive Family Services)

Mai uka ku'u wa'a (My beloved canoe comes from the uplands)

www.hoouluaina.com and www.kkv.net

Ho'okua'āina

Kūkuluhou Internship Program

www.hookuaaina.org

Ulu A'e Learning Center

Ulu A'e Kaiāulu Project

www.uluae.org

Mānoa Heritage Center

Creating a Hub for Cultural Practitioners

www.manoaheritagecenter.org

The Hawaiian Mission Children's Society

Mele Series: Nā Lani 'Ehā

www.missionhouses.org

Kua'āina Ulu 'Auamo

Ho'ōla Hou lā Kalauao: Restoring Identity to Kalauao, 'Ewa, O'ahu

www.kuahawaii.org

Hika'alani

Pilimai 2019

www.hikaalani.website

Pacific American Foundation

Mālama Loko I'a, Mālama Hawai'i 101

www.thepaf.org

PA'I Foundation

I Le'a Ka Hula: Celebrating Culture, Preserving Traditions

www.paifoundation.org

Polynesian Voyaging Society

Moana Nui Ākea: Exploring the Pacific

www.hokulea.com



Photo on the left: Living Hawaiian Culture: A Platform for Cultural Practitioners at Bishop Museum (Hawaiian artisans and practitioners share their knowledge and skills)

Photo on the right: Edith K. Kanaka'ole Foundation's Waiho'olu'u project (making traditional Hawaiian dye using indigenous plants)



Ka Leo O Nā Kupa – Ni‘ihau Language Preservation Program

Ni‘ihau is the only place in the world where Hawaiian is the primary language. The people who live there speak in the way that Native Hawaiians spoke before the missionaries arrived. This group is helping to preserve and perpetuate the unique Ni‘ihau dialect, and tourism dollars are helping to fund the program, which is based out of the University of Hawai‘i.



Waiwai: The Kohala Mountain Music Project

The Kohala Center is documenting its journey to discover, learn and perform two songs that celebrate and perpetuate the cultural treasures of Kohala. The Kohala Mountain Boys, a band of established Hawaiian musicians and practitioners leading the project, are telling the stories of the music, people and culture of Kohala. Tourism dollars are supporting this project.



PILLAR III: COMMUNITY ENRICHMENT

Community Enrichment Program

The Community Enrichment Program (CEP) funds a diverse array of festivals, events and year-round programs in support of culture, culinary, education, health and wellness, nature, agriculture, sports, technology and voluntourism. They are often highly attended by Hawaii's residents. Funding recipients include nonprofit groups, community organizations and businesses with not-for-profit events. HTA issued a request for proposals on May 2, 2019 with a deadline of July 5, 2019 to submit applications. HTA staff held informational briefings on all six islands during the month of May. HTA established five evaluation committees (one for each county and statewide) comprised of HTA staff, island visitors bureaus, the Hawai'i Lodging & Tourism Association, and members from the visitor industry and community. These community-based projects provide unique, authentic and highly-valued visitor experiences. They represent activities developed by our community, for our community, and are things the community wants to share with our visitors. HTA increased the amount of money allocated to the program and the number of awardees for calendar year 2020. In calendar year 2019, the State funded 74 projects. These included:



Hawai'i Island

Volcano Art Center

Volcano Art Center's Hula Arts At Nialani
www.volcanoartcenter.org

North Kohala Community Resource Center

Kohala Kamehameha Day Celebration
www.northkohala.org
www.kamehamehadaycelebration.org

Big Island Resource Conservation and Development Council

Ka'u Coffee Festival
kaucoffeefest.com

HawaiiCon Inc.

HawaiiCon 2019
www.hawaiiicon.com

Hawai'i Wildlife Center

4th Annual Hawai'i Island Festival of Birds
www.birdfeshawaii.org

The Kahilu Theatre Foundation dba The Kahilu Theatre

Kahilu Theatre 2019 Season
www.kahilutheatre.org

Hawaiian International Billfish Association dba Hawaiian International Billfish Tournament

60th Hawaiian International Billfish Tournament
www.hibtffishing.com

Hawai'i Performing Arts Festival Inc.

Hawai'i Performing Arts Festival 2019
www.hawaiiperformingartsfestival.org

Pōhāhā I Ka Lani

Ho'omau Ka Hana No'eau o Waipi'o
www.pohahaikalani.com

Kohala Institute

Traditional Oceanic Tattoo Festival:
 Embodying Knowledge & Culture
www.kohalainstitute.org

Kona Hawaiian Quilt Museum Society

Tropical Inspirations Quilt Show

www.konahqm.orgwww.tropicalinspirationsquiltshow.weebly.com**Kona Historical Society**

Hands on History at the Kona Coffee Living History Farm

www.konahistorical.org**Hawai'i Island Pacific & Asia Cultural Celebration, Inc.**

Hawai'i Kuauli Pacific and Asia Cultural Festival

www.hipacc.comwww.hikuauli.com**Kaua'i County****Mālie Foundation**

Hawaiian Cultural Events and Kaua'i Mokihana Festival 2019

www.maliefoundation.org**Garden Island Arts Council**

E Kanikapila Kākou 2019 - Music is Our Mo'olelo

www.gardenislandarts.org**Hui o Laka dba Kōke'e Natural History Museum**

Emalani Festival – Eō e 'Emalani I Alaka'i

www.kokee.org**KA'IMI NA'AUAO O HAWAI'I NEI**

Heiva I Kaua'i 2019

www.kaimi.orgwww.heivaikauai.com**'Aha Hui E Kālā dba Lawai International Center**

Cultural Awareness Events 2019

www.lawaicenter.org**Po'ipū Beach Foundation**

Po'ipū Food & Wine Festival 2019

poipufoodandwinefestival.com**Kaua'i Rodeo Club Inc.**

Kōloa Plantation Days Paniolo Heritage Rodeo (aka Paniolo Heritage Rodeo, Heritage Rodeo)

www.koloaplantationdays.comwww.cjmkoloaplantationdaysrodeo.com**Kaua'i Outrigger Association dba KOA**

Nā Pali Challenge

www.koapaddler.org**Hanapēpē Economic Alliance**

Kaua'i Chocolate & Coffee Festival 2019

www.hanapepe.org**Po'ipū Beach Foundation**

New Year's Eve Celebration @ Po'ipū Beach Park

www.poipubeach.org**Friends of the Festival of Lights**

Festival of Lights

www.kauaifestivaloflights.com**Hale Puna**

3rd Annual Kaua'i Old Time Gathering

www.halepuna.org**Hawai'i Institute for Music Enrichment and Learning Experience, Inc. dba HIMELE**

Kaua'i Steel Guitar Festival

www.himele.org**Anaina Hou Community Park**

Anaina Hou Community Park Enrichment Programming 2019

www.anainahou.org**Maui County****Japanese Cultural Society of Maui, Inc.**

Maui Matsuri, 19th Anniversary A Japanese Festival

www.mauimatsuri.com

Youth in Motion dba Stand Up Paddle Association of Moloka'i
Moloka'i Holokai Festival
www.molokaiholokai.com

Hui No'eau dba Hui No'eau Visual Arts Center
Hui No'eau Art Exhibitions 2019
www.huinoeau.com

Maui Arts & Cultural Center
Maui 'Ukulele Festival 2019
www.mauiarts.org

Maui Nui Botanical Gardens Inc.
Lā 'Ulu: Breadfruit Day
www.mnbg.org

The Lahaina Restoration Foundation
Four Chinese Festivals
www.lahainarestoration.org

Maui Arts & Cultural Center
Visual Arts Exhibition Program 2019
www.mauiarts.org

Valley Isle Road Runners, Inc. dba Valley Isle Road Runners
Maui Marathon & Half Marathon
www.mauimarathon.com



Arts Education for Children Group
Jazz Maui 2019 - 4th Annual East Meets West Festival & First Sunday Jazz Series
www.jazzmaui.org
www.aecg.org

Maui Pops Orchestra, Inc.
Maui Pops Orchestra 2019 Concerts
www.maui pops.org

Hāna Arts
Hāna Arts Presents! - A Workshops & Events Program for East Maui
www.hanaarts.com

Maui Classical Music Festival
Maui Classical Music Festival 2019
www.mauiclassicalmusicfestival.org

Lōkahi Pacific
Emma Farden Sharpe Hula Festival
www.lokahipacific.org



Hawai'i Bicycling League
Exploring Maui's Greenways, Bike and Walking Paths
www.mauibike.org

Arts Education for Children Group
11th Annual Maui Hawaiian Steel Guitar Festival 2019
www.mauisteelguitarfestival.com
www.aecg.org

Hawaiian Kamali'i, Inc. dba Hawaiian Canoe Club
The Pailolo Challenge 2019
www.hawaiiancanooclub.org
www.pailolo.com

O'ahu

Hawai'i Alliance for Arts Education dba Hawai'i Arts Alliance
POW! WOW! 2019
www.hawaiiartsalliance.org

‘Ukulele Festival Hawai‘i

49th Annual ‘Ukulele Festival Hawai‘i
www.ukulelefestivalhawaii.org/en

Hawai‘i United Okinawa Association

37th Okinawan Festival
www.okinawanfestival.com and www.huoa.org



Bikeshare Hawai‘i

Biki Bike Audio Tours
www.gobiki.org

Honolulu Gay and Lesbian Cultural Foundation

Honolulu Rainbow Film Festival
www.hglcf.org

Hawai‘i Book & Music Festival

Hawai‘i Book & Music Festival 2019
www.hawaiibookandmusicfestival.com

Kīhō‘alu Foundation

Hawaiian Slack Key Guitar Festivals
www.slackkeyfestival.com

Ulu A‘e Learning Center

Kapu‘uola Hula Festival
www.uluae.org

Honolulu Gay and Lesbian Cultural Foundation

HONOLULU PRIDE Parade, Festival and LGBT Youth Education
www.hawaiilgbtlegacyfoundation.com

Sustainable Coastlines Hawai‘i

Creating Unforgettable Experiences on Remote Beaches of Hawai‘i
www.sustainablecoastlineshawaii.org

O‘ahu Resource Conservation and Development Council

Parade of Farms Festival at Kahumana
www.oahurcd.org and www.parade-of-farms.org

City and County of Honolulu, Mayor's Office of Culture and the Arts

Mango Jam Honolulu
www.mangojamhonolulu.com

Kumu Kahua Theatre

The Watcher of Waipuna by Gary Pak and Da Beer Can Hat by Darrell H. Y. Lum
www.kumukahua.org

Hawai‘i Korean Chamber of Commerce

17th Annual Korean Festival



AccessSurf Hawai‘i Inc.

Market of Possibilities
www.accessurf.org

Mālama Loko Ea Foundation

Holole‘a Visitor Tour Program
www.lokoea.org/hololea

MC Events LLC

Hawaiian Makahiki Series
www.makahikichallenge.com

Hawai'i Forest Industry Association

Hawai'i's Woodshow, Nā Lā'au o Hawai'i 2019

www.hawaiiiforest.org<http://woodshow.hawaiiiforest.org>**Nā'ālehu Theatre Inc**

Gabby Pahinui Waimānalo Kanikapila /
Hawaiian Music Masters Youth Outreach and
Community Reinvestment and Live From
Waimānalo Promotional Program

www.naalehutheatre.comwww.gabbypahinui.com**Young of Heart Workshop dba Pu'uhonua Society**

Contact 2019

www.contacthawaii.com**Japanese Cultural Center of Hawai'i**

The New Year's 'Ohana Festival / Shichi Go
San: Keiki Kimono Dressing

www.jcch.com

**DB Productions, Inc. dba Hawai'i Dragon
Boat Association / Chinatown Merchants
Night In Chinatown**

2019 Statewide CEP Awardees**Ebb & Flow Arts**

North South East West Festival 2019

www.ebbandflowarts.org**'Ohina LLC**

'Ohina Short Film Showcase

www.ohina.org**University of Hawai'i Office of Research Services**

Asia Pacific Dance Festival 2019

www.ors.hawaii.edu/www.manoa.hawaii.edu/outreach/asiapacificdance/**travel2change**

travel2change

www.travel2change.org/**Hawaiian Mission Houses Historic Site and Archives**

History Theatre

www.missionhouses.org**Makauila, Inc.**

Great Navigators of Island Earth

www.makauila.org**Lighthouse Project**

Family Ingredients - Season 3 Mālama -
Themed Episodes

www.familyingredients.com**Kupu**

Hawai'i Youth Conservation Corps

www.kupuhawaii.org**Bishop Museum**

Protect Hawai'i's Natural Resources: The story
our data can tell

www.bishopmuseum.org**University of Hawai'i**

Rapid 'Ōhi'a Death Seed Banking Initiative

www.hawaii.eduwww.manoa.hawaii.edu/lyonarboretum**Kua'āina Ulu 'Auamo**

Ho'okua: Restoration of Traditional Ecological
Knowledge for Marine Restoration Through
Mobile Workdays

www.kuahawaii.org

Festivals & Events Workshops

HTA, in partnership with the International Festivals & Events Association, conducted a series of workshops throughout the state targeted at festivals and events planners and organizers. These workshops are geared toward enhancing the success of events/projects in the areas of revenue generation, developing successful volunteer programs, succession planning, risk management and event safety. This year, a little over 180 people registered.



Major Festivals

The State supports world-class festivals and events highlighting Hawai'i's multiethnic people, cultural attributes and unique places that make the Hawaiian Islands one of the world's best destinations to live and visit. These include cultural, arts and culinary celebrations showcasing Hawai'i's heritage and resident pride in their communities, and attracting visitors seeking authenticity in their travel experiences. Most HTA-sponsored festivals and events are strategically held in off-peak travel months to support tourism industry partners by increasing interest from potential visitors to book trips during these periods.



In 2019, the State also supported these major festivals:

- Hawai'i Food and Wine Festival, O'ahu, Maui, Hawai'i
- Hawai'i International Film Festival, O'ahu
- Honolulu Festival, O'ahu
- Koloa Plantation Days Festival, Kaua'i
- Maui Film Festival, Maui
- Pan Pacific Festival, O'ahu
- Kona Coffee Cultural Festival, Hawai'i
- Merrie Monarch Festival, Hawai'i
- King Kamehameha Celebration, Statewide
- Prince Lot Hula Festival, O'ahu
- Aloha Festivals, Statewide
- Mele Mei, Statewide

Career Development

HTA continues to address the changing needs of today's tourism industry workforce by collaborating with educational institutions to make training available to residents working in travel and hospitality, as well as to help enhance their quality-of-service skills. Sustaining tourism's success also depends on developing the next generation of Hawai'i's workforce, at all levels of employment, to carry the industry forward. In 2019, HTA embarked on a new initiative and provided \$500,000 to 10 public high school students which are pursuing a degree in tourism and hospitality management. HTA's career development programs continued to engage and inspire Hawai'i high school and college students with presentations and tours of resorts and hotels to show them the diversity of careers available in the tourism industry.

Ho'oilina Scholarship

In 2019, HTA established the Ho'oilina Scholarship Fund which awards scholarships to college-bound Hawaii High School Seniors based on demonstrated academic achievement, leadership skills and an expressed interest in pursuing a hospitality, tourism or culinary education and career. The HTA partnered with the Hawai'i Lodging & Tourism Association to assist in the promotion and execution of the Ho'oilina



Scholarship. Ten Hawaii public high school students, who planned to pursue tourism-related college degrees in Hawaii, were selected based on grades, leadership skills, and volunteer service. Each was awarded a scholarship valued at \$48,000 (\$12,000 per year). Below is the list of the 2019 Ho'oilina Scholarship recipients and the high schools they graduated from:

- Kari-Ann Akasaki (Pearl City)
- Kailee Chun (Kalani)
- Keslyn Higa ('Aiea)
- Janisse Ibane (Waipahu)
- Taylor Ledgerwood (Kaiser)
- Sarah Lorenzo (Kaiser)
- Macy Luke (Moanalua)
- Emily Quach (Moanalua)
- Rhema Wong (Kaiser)
- Fanglin Xu (Moanalua)



LEI (Lead, Expose, Inspire) Program

LEI is an HTA-sponsored workforce development project created by ClimbHI to inspire Hawai'i's youth to select careers in Hawai'i's visitor industry by providing them with the means to achieve success. The program started in 2011, and has grown to more than 1,000 high school students, 100 college students, and more than 100 businesses participating. LEI events were held in April 2019 on O'ahu, Maui, Kaua'i and

Hawai'i Island. For the first time, the LEI event was also held on the west side of O'ahu at Ko'olina with participation from approximately 200 students from high-schools located in the surrounding area.

Partnership with University of Hawai'i

The HTA partnered with the University of Hawai'i's Kapi'olani Community College and its sister community colleges on the neighbor islands to offer trainings in the areas of customer service and certification of professional tour guides. In 2019, 77 were trained, of which 61 received either certificates or certifications. (*The Fall 2019 semester has not ended as of the publication of this report and thus data is not available as to the number who received certificates/certification.)



NEWS

Training recognizes key role hotel industry could play in cracking down on sex trafficking



Training recognizes key role hotel industry could play in cracking down on sex trafficking

By [Mileka Lincoln](#) | November 4, 2019 at 4:06 PM HST - Updated November 5 at 5:28 AM

HONOLULU, Hawaii (HawaiiNewsNow) - Experts say the vast majority of sex trafficking cases take place at hotels — and Hawaii is no exception.

Sex Trafficking Prevention Workshops

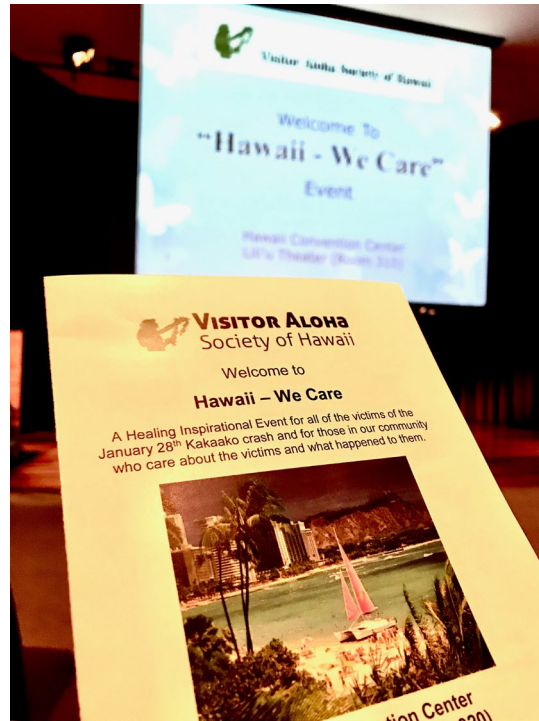
The State sponsored the Campaign for a Safer Community, an initiative to combat sex trafficking in partnership with Ho'ōla Nā Pua, a Hawai'i nonprofit working against sex trafficking. The group says sex traffickers often take advantage of the privacy and anonymity accessible through the hospitality industry. Four symposiums were held across the state in November aimed at empowering Hawai'i's visitor industry management, but everyone who wants to take a stand against trafficking was welcomed. A little over 300 from the visitor industry and community attended. Symposium topics consisted of 1) Defining Trafficking and Exploitation; 2) Tourism Industry Key Partners in Protecting Our Community; and 3) Responding, Reporting, and Action Steps.

Safety and Security

HTA is committed to supporting programs and collaborating with government agencies and organizations committed to the safety and security of everyone in Hawai'i.

In 2019, the State partnered with the City and County of Honolulu's Parks and Recreation Department to provide \$204,000 for the installation of 192 surveillance cameras in 13 parks. HTA Chief Administrative Officer Keith Regan did an interview with Hawai'i News Now for a story on this.





In 2019, support was provided for:

- Visitor Aloha Society of Hawaii (VASH) and Visitor Assistance Programs in all four counties
- Lifeguard ocean safety equipment for all four counties
- Safety signage
- Statewide junior lifeguard program
- Ocean safety advertising campaign at Hawaii's airports
- Snorkel safety study
- Hā'ena emergency support
- Maui coral reef signage



PILLAR IV: BRAND MARKETING

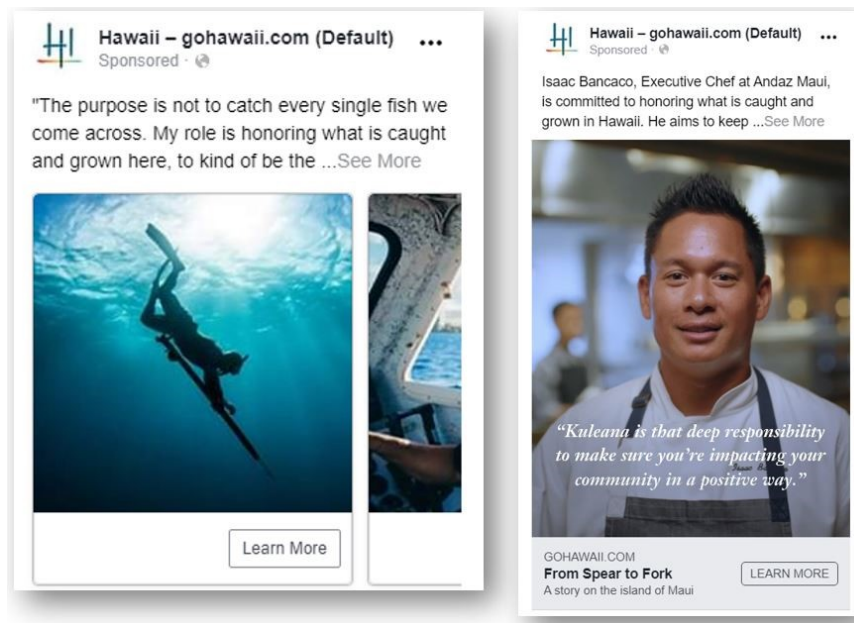
HTA contracts marketing organizations – collectively known as its Global Marketing Team (GMT) – to promote the Hawaiian Islands worldwide. The GMT’s coverage in 2019 included the U.S., Canada, Japan, Oceania, Europe, Korea, China, Hong Kong, Southeast Asia, and Taiwan. Marketing programs and tactics to build brand awareness of Hawai’i differ in each market, but typically encompass advertising, public relations, promotions, trade marketing, MCI marketing, education & training, stakeholder communications, and industry partner relations. The goal set by the new HTA leadership team in 2019 is to attract higher-spending, lower-impact travelers.

UNITED STATES

The U.S. West and U.S. East are Hawai’i’s two largest source markets for visitors, with domestic air seats accounting for 70 percent of total seats to the state in 2019. The U.S. West market includes visitors who travel to the Hawaiian Islands from the 12 states west of the Rockies, and the U.S. East includes all other states. Hawai’i Tourism United States (HTUSA) continued to market and promote Hawai’i to reach avid travelers and now the avid explorers, a subset market which are typically millennial travelers.

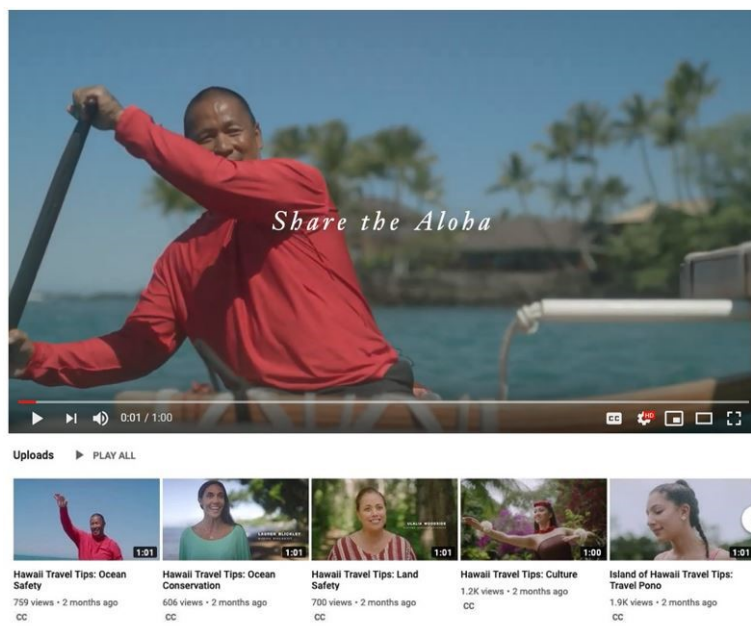
Program Highlights

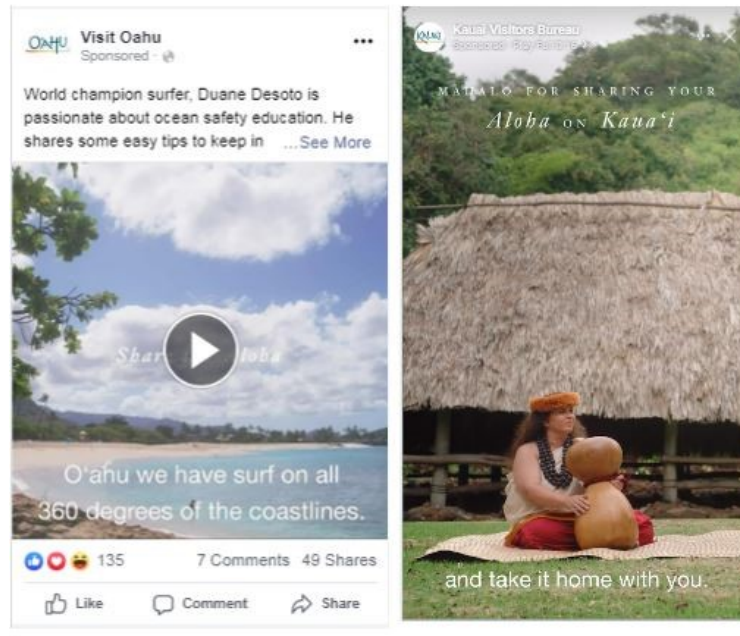
- **Rooted 2.0.** Launched year two of the “Hawai’i Rooted” campaign with seven island-based ambassadors who shared their values and passions in an engaging storytelling format. Year two of the campaign integrated more visitor engagement opportunities than was included in the first year’s stories. It was designed first to be content our targeted future visitors would like to view, and to change their current perceptions by sharing our unique culture, cuisine and the activities available to visitors.



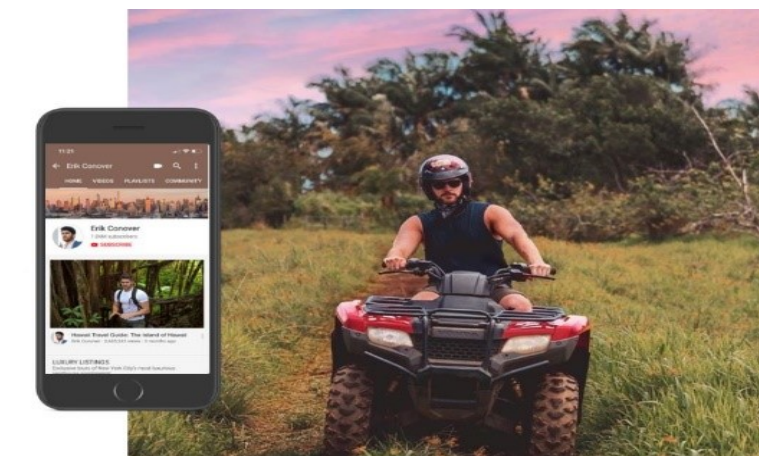


- Kuleana Campaign.** The twenty messages share the values that shape resident behavior and by doing so allow visitors to understand how to be more mindful travelers. These messages are conveyed via the full suite of digital and cooperative marketing delivery tools, primarily after the decision to visit Hawai'i has been made. Combined with the Travel Tips content shared on GoHawaii.com, these messages are designed to increase visitor's safety and shape their behavior while on-island.





- Island of Hawai'i Recovery Program.** A collaborative effort to increase visitation by making people aware of the many unique experiences available on Hawai'i Island beyond Kīlauea was delivered through a coordinated sales and marketing initiative. A bus tour promoting Hawai'i Island traveled from San Diego to Seattle and hosted events in key west coast cities along the route with 33 sales professionals and cultural advisors representing 22 companies targeting travel trade and MCI markets. HTUSA communicated the expanded island of Hawai'i brand through integrated media programs, with the development of new photo and video assets, with a social media campaign coordinated with industry partners, and by hosting press and influencers on-island. A cooperative marketing and conversion program through paid digital media was also implemented.





Photos above are from the bus tour promoting Hawai'i Island, that traveled from San Diego to Seattle. They made a special appearance on KTLA's morning show in Los Angeles.

CANADA

Canada is the second largest international market and fourth largest source market overall for visitors to Hawai'i. Canada's economy was expected to stay stable in 2019 amidst trade wars and political uncertainty. While the exchange rate hovers around 75 U.S. cents, there is some volatility that contributes to travelers' considerations. HTA works with Hawai'i Tourism Canada (HTCAN) to stimulate demand and retain market share while targeting key segments.

Program Highlights

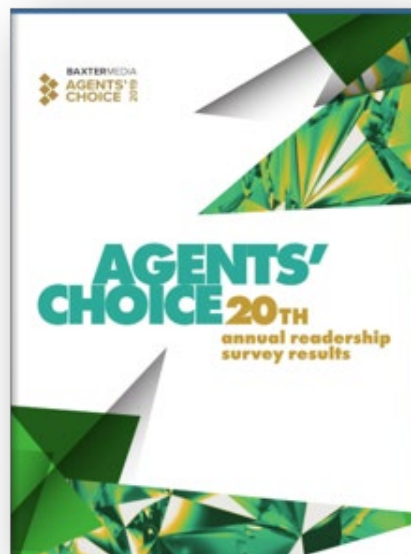
- **TravelWeek Campaign.** The campaign targeted the affluent traveler through e-blasts, newsletters, a contest promotion, brochure, and advertising while promoting responsible tourism and destination education. Kuleana videos were featured in the campaign, which reached approximately 100,000 travel trade representatives.



- **Aloha Canada Trade Mission.** Aloha Canada took place in October in which 15 Hawai'i partners, four Island Chapters, and cultural practitioners went to Toronto, Calgary and Vancouver. The trade mission resulted in approximately 200 travel agents trained as well as media interviews and coverage. Hawaiian culture and responsible tourism were forefront throughout all of the events.



- **Baxter Agents' Choice Awards.** At the 20th Annual Baxter Agents' Choice Awards, Hawai'i was presented as the Honeymoon Destination of 2019 and Hawai'i Tourism Canada was selected as the Tourism Board Asia Pacific, as voted by Canadian travel agents. The program had a reach of approximately 7,000 agents.



JAPAN

Japan is Hawai'i's largest international market, amounting to about 15 percent of total visitor arrivals to the state. Hawai'i continues to thrive in an increasingly competitive travel environment in Japan. With the changes in airlift such as the two ANA Airbus A380s entering the market in May and July, along with the suspension (May) and resumption (November) of direct flight service to Fukuoka, Hawai'i Tourism Japan (HTJ) is elevating and adjusting strategies based on market trends and needs. HTJ created unique plans targeted to each segment of consumers. Consumer targets were affluent, romance, three-generation families, seniors, consumers in their 30s and 40s, millennials (20s), first-timers, and repeaters. Japan also faced numerous disasters including earthquakes and Typhoon Faxai and Hagibis that devastated Japan, affecting densely populated areas including Tokyo. Japan's focus on gearing towards the 2020 Tokyo Olympics and expansion of Haneda Airport will affect both inbound and outbound travel in 2020.

Program Highlights

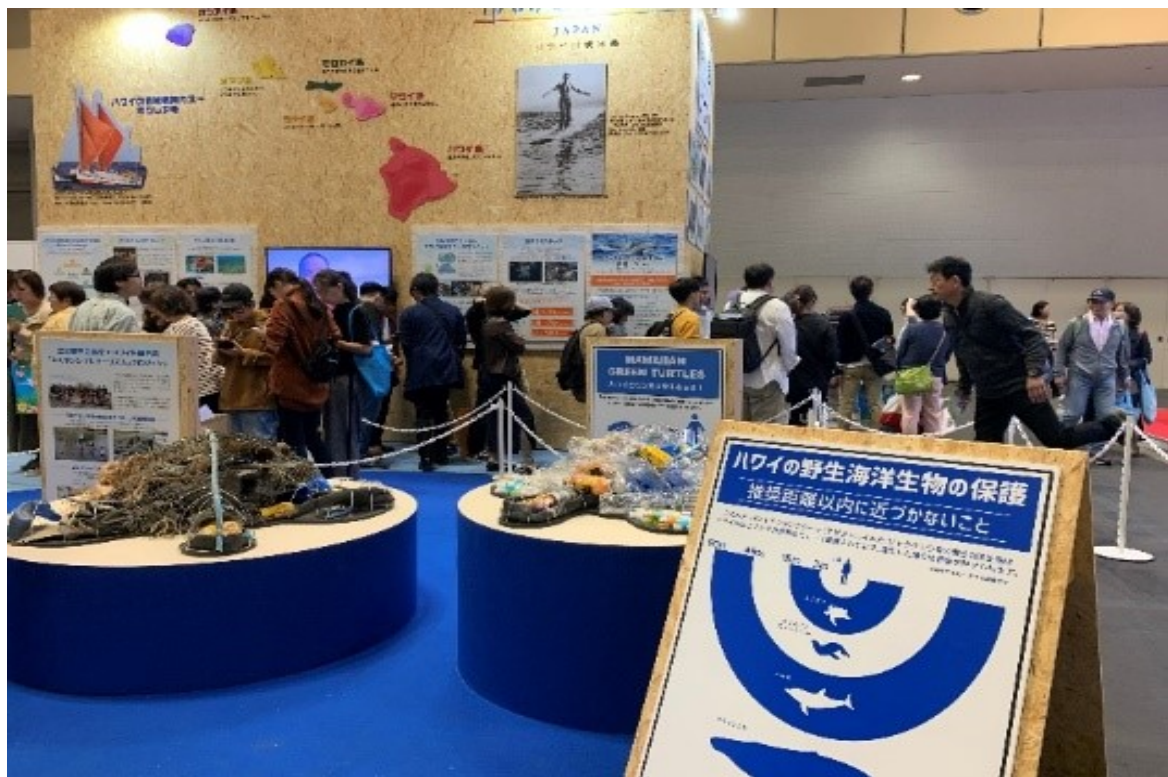
- Hawaiian Islands Branding.** HTJ implemented Out-of-Home (OOH) advertising in major cities (Tokyo, Nagoya, Fukuoka) using Hakken Hawai'i, Romantic Hawai'i, and the Moment of Island of Hawai'i movies. Total OOH Impression 156,035,754 was recorded from the advertisements. Various SNS ads were conducted, resulting in 662,882 reach and 1120390 impressions. YouTube ads generated 880,660 views. All advertisements were strategically placed to facilitate the most effective responses.



- Island of Hawaii Promotion.** HTJ continued Hawai'i Island recovery initiatives in 2019. Media coverage including TV, Print and Online resulted in 3,885,501,584 impressions and AVE of \$25,056,241. Together with media coverage, the travel industry placed more efforts promoting the island of Hawai'i. In July, the Japan Summit was held on Hawai'i Island and hosted 60 agents & airlines' representatives (24 companies) from Japan, along with 20 local agents. Close to 120 representatives from 60 marketing partners (26 entities from the Island of Hawai'i) were able to participate in a trade show.



- **Responsible Tourism.** To increase quality visitors from Japan, HTJ provided educational opportunities to not only direct consumers, but also to the travel trade industry. HTJ collaborated with local communities such as the Polynesian Voyaging Society (Moananuiākea video translation), NOAA (Support translation of marine protection flyer), and the DLNR (Mālama Hawai'i video placement in airlines' inflight channels) to increase awareness amongst the Japanese market. All Share Aloha and Hawai'i Rooted videos were translated in Japanese and distributed via SNS, online media, wholesalers and OTA's distribution channels.



OCEANIA

Hawai'i Tourism Oceania (HTO) markets Hawai'i to visitors from the countries of Australia and New Zealand. It encouraged travel in 2019 by maintaining strong industry partnerships, and promoting Hawai'i as a value-for-money destination while highlighting the experiences, beauty and culture.

Program Highlights

- **Aloha Down Under.** Successfully ran the annual multi-city Aloha Down Under sales mission with participation from 21 Hawai'i and Australasian based partners. Workshop events and destination training sessions reached more than 840 travel agents in five cities across Australia and New Zealand.



- **Responsible Tourism.** Partnered with National Geographic to launch the latest addition to Eco Traveller - a global content series exploring the importance of responsible travel around the globe. Hosted by Australian marine conservationist Laura Wells, Eco Traveller Hawai'i uncovers the inspiring people on the Island of Hawai'i that are working towards a better future for their island, shining a light on Hawai'i's forward-thinking approach to responsible tourism.



- **Month of Lei Roadshow.** Organized the Month of Lei Roadshow incorporating in-depth destination training events with our Island Chapter partners. Workshops were held in five cities in Australia and New Zealand, reaching over 300 agents. The training was supported by cooperative marketing activity.



EUROPE

Hawai'i Tourism Europe (HTE) targets visitors from the countries of United Kingdom and Germany, which are the top two source markets in the Europe major market area. Visitors from Europe have the longest average length of stay of all visitors to Hawai'i. Hawai'i continues to be represented in Europe with offices in London and Munich.

Program Highlights

- **Metro Media Visit.** Arranged a media visit for Laura Millar, Travel Editor at Metro, during which she visited Maui and O'ahu. This generated a three-piece spread in Metro which garnered exposure valued at approximately £120,020 (\$147,650).



- Abenteuer Und Reisen Magazine Coverage.** Produced a 20-page article about O’ahu, Kaua’i and Moloka’i in abenteuer und reisen, a travel consumer magazine with a circulation of 87,600 and readership of 420,000, in the November 2019 issue which resulted in a PR value of about \$292,300.



- 'Share The Aloha' Influencer Campaign.** Took influencers Marie Fe, Jake Snow and Yvonne Pferrer to visit Maui, Kaua’i, O’ahu and Hawai’i Island in August, during which they produced social media content that has so far had more than one million engagements, and captured footage to be used in the 2019 'Share The Aloha' campaign, promoting sustainable and responsible travel across the Hawaiian Islands.



KOREA

South Korea forecast a 1.8 percent to 2.0 percent GDP growth in 2019 due to a sluggish economy and declined consumers' consumptions. Korea Tourism Organization (KTO) reported the number of Korean outbound travelers YTD September in 2019 is 20,078,068, a year-on-year increase of 3.9 percent. Korean Air (KE) will launch its additional regular flights KE051 (ICN-HNL) from December 9, 2019 through March 28, 2020. With the additional four times a week direct flights, it's expected to generate 3,052 incremental seats in 2019 and 10,464 seats in 2020. Hawai'i Tourism Korea (HTK) developed new niche market segments for Hawai'i in order to target upscale market segments such as family, active seniors, single-household and special interest traveler segments for 2019.

Program Highlights

- **TV Film Project with MBC <Single Life>**. HTK conducted a nationwide TV project in partnership with MBC, Korea's biggest broadcasting network. It was a great success, with an average audience share of 11.5%, equivalent to six million impressions per episode. As a result, the show generated \$70 million in PR value, including five re-runs of the two episodes.



LOTTE LPGA CHAMPIONSHIP
18홀 골프 라운딩 포함

2019 LOTTE LPGA CHAMPIONSHIP
전 세계 14개 국가에서 펼쳐지는 34개의 대회!
4개국과 1억 7천 8백만 가구가 사랑하는 LPGA와 함께하는 LOTTE CHAMPIONSHIP 대회가 전세계를 무명으로 개최됩니다!

대회명	2019 LPGA LOTTE Championship	2018년 우승자	Brooke Henderson
대회기간	2019. 04. 17 - 04. 20	발행사	Golf Channel JTBC Golf
대회장소	Ko Olina Golf Club		
출전 선수수	12명		

하와이 더 자세히 알아보기 ▶

- #LuxuryHawai'i Promotion with Korean Air.** HTK carried out a large scale of branding campaign to position Hawai'i as premium destination in collaboration with the nation's flag carrier Korean Air. The campaign generated a total of 5,477 ticket sales, a year-on-year increase of 15%, and attracted 1,211 participants during the two-month promotional period. Online banner advertising was featured in 27 media outlets and newsletter distribution to 119,597 clients resulted in an 'open rate' of 87.8%.
- Golf Promotion with LPGA & Lotte JTB.** HTK partnered with Lotte JTB to launch a range of golf tour products and promote Hawai'i as a year-round optimal golf destination in the Korean market. The multi-faceted Hawai'i golf promotion has generated a total of 237 pax in Leisure/MCI leads, achieving a year-on-year increase of 10%.

CHINA

Amidst the ongoing trade negotiations between China and U.S. and surging exchange rates, the inbound travel from China to the U.S. fell 5.7% year over year in 2018, concluding 14 consecutive years of arrival growth. Through August 2019, non-immigrant visa issuance is down 16% YOY according to U.S. Bureau of Consular Affairs. In August 2019, Air China ended its three times a week nonstop flights between Honolulu and Beijing. Hawai'i arrivals from China through September 2019 dropped 26% to 75,057 visitors compared to the same period last year. Despite the down trend in visitation, the Chinese still have the highest in per person per day spending (\$320) among all visitors to Hawai'i. Hawai'i Tourism China (HTC) continues to focus on positioning the Hawaiian Islands as the "Diamond of Islands" – a premium destination for high-value, responsible travelers.

Program Highlights

- **Olympic Dreams - Hawai'i Campaign.** To position the Hawaiian Islands as the original birthplace of surfing, HTC kicked off a marketing campaign "Olympic Dreams - Hawai'i" by partnering with China's favorite surfing celebrity couple Zhang Liang and Yang Xue who will compete in the 2020 Tokyo Olympics. The newlywed's "Hawai'i – The Birthplace of Surfing" video featuring their romantic Hawai'i surfing journey received an outpouring of over 1.5 million social media impressions.



- Hawai'i Rainbow Routes – Responsible Tourism Campaign.** HTC partnered with MiYu, a leading co-working brand with 16 office spaces across China, launched “Rainbow Routes - Hawai'i” campaign with Aureana Tseu (former Miss Hawai'i USA), and Sicilia, a leading nature and outdoor social influencer to promote the Hawaiian Islands and responsible travel. Following the successful MiYu event, HTC promoted responsible travel to Hawai'i with FM940 5-Star Radio and Shanghai FM101.7 achieving a captive reach of 1.1 million car owners or high-value travelers.

米域 知时 × HAWAIIAN ISLANDS

西西里
新浪微博旅游大V
穷游精华作者
携程旅行家
环球旅拍玩家

赵婧
夏威夷旅游局旅游行业与会奖总监
15年资深旅游从业者

Aureana Tesu
前夏威夷小姐冠军
呼啦舞表演艺术家
自13岁就开始进行专业的呼啦舞国际巡演

知时优选课程第六期

如何将旅行与生态保护结合?

课程亮点

- 玩转低碳旅行
- 一边旅行一边做公益
- 微博大V带你解锁生态旅行的花样玩法

2019.8.17/15:20 | 米域礼和九江路168号5楼

知时优选课程第六期

什么才是负责任的旅行?

课程亮点

- 什么是负责任的旅行
- 从哪些方面可以做到随手环保?

2019.8.17/14:30 | 米域礼和九江路168号5楼

知时优选课程第六期

呼啦舞 夏威夷文化的传承

课程亮点

- 女神现场表演并教学呼啦舞
- 带你了解夏威夷文化

2019.8.17/16:10 | 米域礼和九江路168号5楼

- Co-ops with All Nippon Airways (ANA).** To deepen destination awareness of Hawai'i and to target high-yield travelers, HTC launched a series of co-ops with ANA highlighting Hawai'i's abundant tourism resources and air routes available from China to Hawai'i operated by ANA. Co-ops included joint social media promotions, B2B educational seminars, China Aloha Mission that was attended by 370 leisure and MCI trade buyers and media, and a joint exhibition at the CITIE, one of the largest travel shows in Southern China attended by 500,000 visitors during the three-day event.



HONG KONG

The on-going social unrest in Hong Kong this year tumbled the outbound market and sapped appetite for consumption. Demand for outbound travel has decreased significantly while travel agents and airlines estimated that the long-haul destinations including Hawai'i will see further drop in the 4th quarter of 2019. Through September, a total of 3,350 people from Hong Kong visited Hawai'i, a 10.6% decrease year over year. Synced with Mainland China's marketing efforts, Hawai'i is branded in Hong Kong as the world-class vacation destination with unique culture and offerings to inspire high-end active leisure travelers, young families, couples and responsible travelers. Hawai'i Tourism Hong Kong (HTHK) continues to focus on improving Hawai'i competitiveness through emotion-connected campaigns to stand out in the market and connect local communities with like-minded travelers.

Program Highlights

- **“The Awe-inspiring” Campaign.** HTHK first launched “The Awe-inspiring” TV program with two eco-tourism themed episodes on TVB, the most-watched TV channel in Hong Kong. This TV program featured Hawai'i's natural and cultural beauty and increased sensitization towards environmental conservation for the Hawaiian Islands, gaining more than 18 million impressions. HTHK led top three high-end travel planners to Hawai'i to experience a similar itinerary of “The Awe-inspiring” TV program and as a result, a total of 10 new Hawai'i products have been created from this campaign.



- **Airline and OTA Collaboration.** To increase mindshare among potential travelers in Hong Kong for Hawai'i, HTHK partnered with Korean Airlines, Hutchgo.com, and Club Travel to launch two waves of online content campaign around the Hawai'i Islands with call to action. This campaign achieved over 10 million media impressions with \$300,000 in media value.



- Aloha Festival in Hong Kong.** The first-ever large-scale outdoor event, Aloha Festival 2019 took place at the Central Waterfront on July 28 - 29. HTHK, together with Hong Kong International Hula Association and SummerFest, brought the spirit of Aloha – Love and Harmony – to Hong Kong through Hawaiian music, hula, stories, food, and cultural workshops, attracting more than 5,000 participants, mostly families with kids, against the backdrop of Hong Kong protests.



SOUTHEAST ASIA

Southeast Asia has been the fastest-emerging outbound travel region in the world, with a forecast for continued robust growth through 2020. According to Nielsen Research, the middle-income population of Southeast Asia is projected to increase more than double to 400 million by 2020. Malaysia still records as the highest outbound travel in the region while Singapore is the only country in Southeast Asia granted free-visa to the U.S. In 2019, HTSEA targets high-spending travelers such as romance seekers, silver travelers, and corporate incentive groups. Through September, Hawai'i welcomed 49,693 visitors from the four primary markets: Malaysia (15,833), Thailand (23,151), Indonesia (6,454) and Singapore (4,255).

Program Highlights

- Social Influencer Program.** In May 2019, HSTEA invited top three influencer couples to travel to Hawai'i experiencing the unique richness of the Hawaiian Islands. Each of the four major islands (O'ahu, Maui, Kaua'i, and Hawai'i Island) was showcased as a unique romantic destination to the digital audience in Malaysia. All three couples posted articles, photos, and short videos of their romantic journey in Hawai'i resulted in 1.5 million authentic reach in Facebook, Instagram and YouTube.



- Aloha Trade Mission.** This year's Aloha Mission was held in Kuala Lumpur, Malaysia and Jakarta, Indonesia from September 10 to 13. Eight Hawai'i stakeholders and more than 70 trade partners in each city participated in the B2B events. In addition, HTSEA conducted a media round table with 36 media outlets on September 10 to officially kick start the mission and to gain media exposure for Hawai'i.



- **MY Hawai'i Fiesta.** A large consumer event, held in Sunway Velocity Shopping Mall from October 31 to November 3, 2019, aimed to raise brand awareness for Hawai'i as the ultimate long haul vacation destination. HTSEA partnered with Philippine Airlines, Hawaiian Airlines, Corporate Information Travel, and Apple Vacations with in-kind support from Go Pro, Prince Waikīkī Hotel, and Roberts Hawai'i as lucky draw sponsors. Hula performances took the center stage attracting thousands of shoppers during the four-day promotion.



TAIWAN

Hawai'i Tourism Taiwan (HTT) implemented integrated brand marketing strategies for 2019 by focusing on perfecting the brand positioning in Taiwan for the Hawaiian Islands as a prime destination for exceptional experiences, targeting high-value segments such as culture & history aficionados, honeymooners, nature lovers, and establishing a close-knit community for Hawai'i enthusiasts. Through September 2019, visitor arrivals and expenditures from Taiwan rose significantly compared to the same period last year. Contributing to the growth was more than 4,000 visitors from an insurance group that traveled on incentives to Honolulu in May 2019.

Program Highlights

- **Hawai'i Aloha Festival 2019.** On July 6 – 7, HTT hosted a large consumer event at the Huashan Cultural Park in Taipei with Hawaiian décor, destination information, and experiential activities such as 'ukulele music, hula dance, lei workshop, and Hawai'i inspired food & drink. Highlight of the festival was the performances from renowned hālau Ke Kai O Kahiki from Hawai'i. In addition, major airlines and travel agencies were on site promoting Hawai'i travel products. The two-day event attracted over 3,000 consumers with extensive media exposure (57 Facebook stories; 30 Instagram stories; 38 YouTube video clips; 140,200 Facebook event page reach).



- **Collaboration with Major Fashion Media.** In the months of March, July, and August, HTT collaborated with three top-tier fashion magazines Marie Claire, VOGUEme, and Elle Taiwan to position Hawai'i as an aspirational destination for trendy travelers who seek premium experiences, communicating the diverse and upscale experiences that Hawai'i has to offer, generating a total of 21.1 million impressions through magazines' multiple platforms including print, website, Facebook, Instagram and YouTube.



- **Marketing Campaign with China Airlines.** HTT worked with the airline to promote its 3rd weekly flight that was added in May 2019. A series of promotions launched including a hosted media event to announce the additional flight, a hula flash mob with live 'ukulele performances at Eslite Spectrum, an upscale shopping mall in Taipei, targeted banners and video advertisement on Google Display Networks, and radio advertising in three first-tiered metropolitan cities (Taipei, Taichung and Kaohsiung). 13 media outlets including newspaper, travel trade magazine, and online media participated in the media event. The radio and online banner and video ads produced more than 25.7 million impressions.



SEA CLEANERS

A remote part of Hawaii Island's southeast coast is littered with trash and marine debris. A group of high school students from New Zealand, Australia and Japan helped to clean it up as part of a responsible tourism project organized by the Sea Cleaners. HTA helped to fund their trip, during which the teenagers educated some of Hawaii's kids about plastic pollution.



SPORTS MARKETING

Sports marketing is an important component of HTA's branding strategy. Sports events attract fans and foster the desire to visit Hawai'i through media exposure while giving residents opportunities to see world-class athletes compete in Hawai'i. Prior to supporting a sporting event, there must be a community outreach effort by the team or organization.



COMMUNITY OUTREACH: L.A. RAMS



The L.A. Rams held a football clinic for 300 players from eight of the top Hawai'i high school football teams. The State paid to have players and coaches fly to O'ahu from Kaua'i, Maui and Hawai'i Island. The L.A. Rams played the Dallas Cowboys at Aloha Stadium in August 2019.



There was also cheer camp for 300 youth cheerleaders



COMMUNITY OUTREACH: AVP



Thanks to State funding, AVP held 17 beach volleyball clinics across the state on the six main islands ahead of the AVP Hawai'i Open in Sept. 2019. Nearly 500 kids attended the clinics. The organization also donated volleyballs and other equipment to the kids and youth clubs.



COMMUNITY OUTREACH: L.A. CLIPPERS



The L.A. Clippers held basketball clinics for more than 400 children and coaches from Hawai'i youth organizations in between their games and training camp on O'ahu. The State paid to fly about 100 kids and coaches to O'ahu from Hawai'i Island, Maui, Lāna'i, Moloka'i and Kaua'i.



2019 SPORTING EVENTS SUPPORTED BY HTA

<u>Sentry Tournament of Champions</u>	January 2019	Maui
<u>Sony Open</u>	January 2019	O'ahu
<u>Mitsubishi Championship</u>	January 2019	Hawai'i
<u>Polynesian Football High School All-Star Game</u>	January 2019	O'ahu
<u>Pacific Rim Cup</u>	February 2019	O'ahu
<u>Hawaii Night - L.A. Clippers</u>	March 2019	Los Angeles, CA
<u>Lotte Championship</u>	April 2019	O'ahu
<u>Invesco Hawaii Champions Cup</u>	May 2019	Maui
<u>Maui SUP Cup</u>	July 2019	Maui/Moloka'i
<u>Duke's OceanFest</u>	August 2019	O'ahu
<u>Queen Liliuokalani Long Distance Canoe Race</u>	August 2019	Hawai'i
<u>Kauai Marathon</u>	September 2019	Kaua'i
<u>The Pailolo Challenge</u>	September 2019	Maui/Moloka'i
<u>Na Wahine O Ke Kai Canoe Race</u>	September 2019	Moloka'i
<u>L.A. Clippers Pre-season Game</u>	October 2019	O'ahu
<u>Maui Marathon</u>	October 2019	Maui
<u>XTERRA World Championship</u>	October 2019	Maui
<u>Ironman Triathlon</u>	October 2019	O'ahu
<u>Maui Jim Maui Invitational</u>	November 2019	Maui
<u>XTERRA Trail Championship</u>	December 2019	O'ahu
<u>Honolulu Marathon</u>	December 2019	O'ahu
<u>Hawaii Open</u>	December 2019	Hawai'i
<u>Diamondhead Classic</u>	December 2019	O'ahu
<u>Hawaii Bowl</u>	December 2019	O'ahu

UH VS. UW FOOTBALL

HTA partnered with UH Athletics to support the University of Hawai'i football team as it took on the University of Washington in Seattle. The State put \$50,000 towards an alumni reception and a tailgating party, and to provide it leaves for UH fans. The money also went towards bringing the UH cheer team to Seattle along with the Hawaiian Airlines Serenaders. They, along with some HTA staff, also went to the Seattle Children's Hospital to cheer up the patients. They were joined by UW cheerleaders.



BUDGET AND FINANCES

HTA is funded through money collected from the Transient Accommodations Tax (TAT), a 10.25% tax that people pay when they stay in legal accommodations in Hawaii.

Hawai'i Tourism Authority Fiscal Year 2019 Actuals

REVENUES	
TAT Deposits - Tourism Special Fund	\$79,000,000
Investment Income / Miscellaneous Receipts	206,000
TOTAL REVENUES	\$79,206,000
APPROPRIATIONS	
FY 2019	\$87,446,000
TOTAL APPROPRIATIONS	\$87,446,000
HTA EXPENDITURES*	
Perpetuating Hawaiian Culture	\$ 4,577,000
Natural Resources	1,802,000
Community	4,254,000
Branding	50,772,000
Sports	7,692,000
Safety and Security	2,032,000
Tourism Research	4,551,000
Administrative	2,077,000
Governance and Organization-Wide	1,111,000
TOTAL HTA EXPENDITURES**	\$78,868,000

* Hawaiian culture is intertwined throughout all areas of HTA activity.

** Additionally, \$1,000,000 in general funds were spent, in working with the Hawai'i Lodging and Tourism Association, to help address homelessness in tourist and resort areas. Funds were matched dollar-for-dollar by the private sector.

HAWAI‘I CONVENTION CENTER

- Construction completed in 1998
- State-owned facility
- Managed by AEG



Fiscal Year 2019 Actuals

REVENUES

TAT Deposits - Convention Center Enterprise Special Fund	\$16,500,000
Convention Center Operations	9,235,000

TOTAL REVENUES \$25,735,000

APPROPRIATIONS

FY 2019 \$54,053,000

TOTAL APPROPRIATIONS \$54,053,000

EXPENDITURES

Convention Center Facility Operations:	
Operator Costs	\$11,466,000
Governance & Org-Wide Costs (Incl. Conv Ctr Insurance)	554,000

Convention Center Sales and Marketing 5,895,000

Convention Center Repair and Maintenance 5,414,000

TOTAL EXPENDITURES \$23,329,000

HCC – 2019

- Hosted events for several major organizations including the Society for Gynecologic Oncology, American Roentgen Ray Society, U.S. Conference of Mayors, International Congress of Toxicology, Ocean Obs and the Society for the Advancement of Chicanos/Hispanics and Native Americans.
- Awarded the prestigious 2019 Venue Excellence Award from the International Association of Venue Managers (IAVM). Other awards received in 2019 include the third consecutive Stella Award from Northstar Meetings Group for Best Convention Center in the Far West Region (silver), and the 2019 Prime Site Award from Facilities & Destinations magazine. It is the 20th year HCC has won that award.
- Initiated building upgrades including 1801 Café, a lobby café and bar, cooling tower replacement, boiler replacement and security camera and access control upgrades.
- Maintained LEED v4 O+M: Existing Buildings Gold Certification by engaging in on-going testing and surveys; Indoor Air Quality and Transportation and Comfort Survey. Departments continued to track sustainable purchases and operating practices. HCC also launched the Ho‘omalūō sustainability program that celebrates our commitment to preserve, protect and enhance the natural beauty of the Hawaiian Islands.
- Hosted its first-ever zero-waste event – the Pacific Building Trade Expo, on Oct. 1, 2019 – helping to divert 1,283 pounds of waste from the landfill. This included reducing, reusing, sorting and recycling, as well as sending items to H-POWER. Zero waste is a philosophy and a design principle that takes a whole system approach to resources and waste. It reduces consumption, minimizes waste, maximizes recycling and composting, and ensures that products are made to be reused, repaired or recycled back into nature or the marketplace.
- Awarded \$40,000 in grants to two nonprofit organizations in Hawai‘i. The AEG Community Foundation’s mission is to support children and families in need in the areas of K-12 education, the arts, and health and wellness in communities where AEG operates. Make-A-Wish Hawai‘i received \$25,000, and the Boys & Girls Club of Hawai‘i received \$15,000.
- Launched the first ever “Winter Wishes – A Holiday Festival” to bring residents and visitors to HCC over the 2019 holiday season. Part of the proceeds will support early childhood literacy in Hawai‘i’s schools through Kristi Yamaguchi’s Always Dream Foundation.



Table 1: Hawai'i Convention Center 2019 Events

EVENT NAME	DATES	ACTUAL ATTENDANCE	OFFSHORE ATTENDANCE	TAX REVENUE STATEWIDE (\$)
Sports Express 2019	January 6-10	50	100	\$45,801
AAU Trans Pacific Championships	January 18-21	7,000	760	\$348,090
International Group 2019	January 20	843	1,400	\$641,219
International Group 2019	January 31-February 2	1,035	1,100	\$503,815
Domestic Group 2019	February 2-9	5,176	3,000	\$1,374,040
Domestic Group 2019	February 2-9	5,176	3,000	\$1,374,040
International Group 2019	February 14	875	900	\$412,212
AAU Honolulu Grand Prix	February 15-18	2,974	1000	\$458,013
International Group 2019	February 23-24	700	500	\$229,007
Honolulu Festival 2019	March 8-10	15,580	5,500	\$2,519,074
SGO 2019 Annual Meeting	March 13-19	2,541	1,800	\$824,424
HIM2019	March 21-23	3,200	600	\$274,808
International Group 2019	March 30-April 1	244	250	\$114,503
International Group 2019	April 7-8	132	200	\$91,603
Applied Materials 2019	April 9-18	912	1,300	\$595,417
Varsity Spirit Championships	April 18-20	1,974	602	\$302,289
2019 American Roentgen Ray Society (ARRS) Annual Meeting	May 2-10	2,430	2,000	\$916,027
Hawaii District Championships 2019	May 4-5	3,064	460	\$210,686
International Group 2019	May 13	292	340	\$155,725
Domestic Group 2019	May 19-20	1,770	2,000	\$916,027
AECOM 2019	May 19-24	81	75	\$34,351
Shinnyo-en Hawaii 2019	May 23-26	2,000	2,000	\$916,027
Jump Dance Convention 2019	May 23-26	1,000	300	\$137,404
AVID 2019	June 3-5	525	500	\$229,007
Pacific Rim Championships 2019	June 20-24	1,604	1,100	\$503,815
Aloha International Piano Festival 2019	June 23-30	83	30	\$13,740
US Conference of Mayors	July 1	800	700	\$824,424
International Congress of Toxicology 2019	July 13-19	933	2,000	\$916,027
NMA 2019 Annual Convention & Scientific Assembly	July 26-31	2,350	2,000	\$916,027
International Group 2019	August 11-13	3,222	3,100	\$1,419,841
Ocean OBS 2019	September 14-20	1,554	1,200	\$549,616
TRY Group 2019	October 10	-	100	\$45,801
Domestic Group 2019	October 28-November 2	-	3,800	\$1,740,451
Health Span Hawaii Summit 2019	November 4-5	-	1,000	\$458,013
2019 Annual Meeting of the American Studies Association	November 6-10	-	2,500	\$1,145,033
Pac Futsal 2019	November 26-December 1	-	950	\$435,113
2019 Honolulu Marathon Expo	December 5-9	-	22,300	\$10,213,698
International Group 2019	December 5	-	150	\$68,702
Golder Global Partner Meeting	December 9-16	-	750	\$343,510
Total Definite Bookings for 2019:		70,120	71,367	\$33,217,420

Table 2: Hawai'i Convention Center 2020 Events

EVENT NAME	DATES	PROJECTED ATTENDANCE	TAX REVENUE STATEWIDE (\$)
2020 AAS Winter Meeting	January 4-9	3,000	\$1,374,040
The International Academic Forum (IAFOR) 2020	January 9	162	\$74,198
AAU Trans Pacific Championships 2020	January 16	2,000	\$916,027
Aquaculture America 2020	February 8-12	1,500	\$687,020
Hawaii Futsal Cup 2020	February 15-17	500	\$229,007
International Group 2020	February 24	600	\$274,808
Golden Oldies World Netball Festival 2020	March 15-21	700	\$320,609
HIM2020	March 19-21	600	\$274,808
Varsity Spirit Championship 2020	April 3-5	759	\$347,632
Domestic Group 2020	April 24-May 1	3,000	\$1,374,040
IMMUNOLOGY 2020 TM	May 8-12	3,000	\$1,374,040
Jump Dance Convention 2020	May 21-24	300	\$137,404
Domestic Group 2020	June 2-12	17,000	\$7,786,228
2020 Goldschmidt Conference	June 20-26	3,500	\$1,603,047
Pacific Rim Championships 2020	July 2-6	1,200	\$549,616
NALC 2020 Biennial Convention	August 10-22	6,500	\$2,977,087
PRIME 2020	October 2-9	3,000	\$1,374,040
ARVO Pacific Rim 2020	October 13-18	1,200	\$549,616
AAP 106th Annual Meeting	October 27-November 4	4,500	\$2,061,060
ISESS 2020 Annual Conference	November 6-7	250	\$114,503
IFEBP 2020 Convention	November 16-19	7,000	\$3,206,094
Pac Futsal 2020	December 1-6	1,050	\$480,914
2020 International Chemical Congress of Pacific Basin Societies	December 15-20	14,000	\$6,412,187
Total Definite Bookings for 2020:		75,321	\$34,498,026



Photo credit: HTA / Dana Edmunds

TOURISM RESEARCH AND PLANNING

The availability and utilization of timely, insightful visitor research is vital to Hawai'i's tourism industry stakeholders for making sound business decisions. Hawai'i tourism is in a very mature phase requiring continuous research and gathering of data to supplement knowledge for enhancing brand awareness, improving product experiences, maintaining competitive advantages against other destinations, and balancing the needs of Hawai'i's residents and communities. HTA's Tourism Research Division ensures quality marketing research is available to educate tourism stakeholders and help empower them in making intelligent, data-driven decisions.

PROGRAMS

- Calculation of Visitor Characteristics and Expenditures
- Evaluation and Performance Measures
- Estimation of Visitor Arrivals by Country by Month
- Marketing Research and Other Research
- Data Dissemination
- Tourism Strategic Plan and Brand Management Plan
- Infrastructure Research

Publication	Section of Website	Release Date(s)
Monthly Visitor Statistics and News Release	Monthly Visitor Statistics	By the last day of the following month
Major Market Area Highlights and Fact Sheets	Monthly Visitor Statistics	By the last day of the following month
Air Seat Outlook (3 months)	Infrastructure Research	By the last day of the month prior
Hawai'i Hotel Performance Report	Infrastructure Research	By the last day of the following month
Hawai'i Timeshare Quarterly Report	Infrastructure Research	Quarterly
Hawai'i Vacation Rental Performance Report	Infrastructure Research	By the last day of the following month
Annual Visitor Research Report	Annual Visitor Research	Annually, in the fall
Visitor Plant Inventory	Visitor Plant Inventory	Annually, in December
Quarterly Visitor Satisfaction Monitoring Report	Visitor Satisfaction and Activity	Quarterly
Annual Visitor Satisfaction and Activities Report	Visitor Satisfaction and Activity	Annually, in the fall
Quarterly Timeshare Report	Infrastructure Research	Quarterly
Marketing Effectiveness Study	Marketing Research	Annually, in spring and fall
Resident Sentiment Survey	Evaluation and Performance Measures	Annually
Daily Air Passenger Counts	DBEDT	By 4 p.m. each workday

HAWAI'I VISITOR STATISTICS

STATEWIDE AND BY ISLAND

Table 3: Statewide Visitor Statistics

Statewide	2018 Final	2019 Forecast	% Change	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures (\$mil.) ¹	17,642.5	17,714	0.4%	13,347.00	0.2%
Visitor Arrivals (Air and Cruise)	9,888,845	10,451,285	5.7%	7,858,876	5.5%
Per-Person Per-Day Spending	198.3	196.6	-0.9%	194.6	-2.6%
Total Air Seats	13,138,502	13,522,688	2.9%	10,230,151	2.3%

Table 4: O'ahu Visitor Statistics

O'ahu	2018 Final	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures (\$mil.) ¹	7,969.10	6,177.60	2.3%
Visitor Arrivals	5,862,358	4,690,139	5.9%
Per-Person Per-Day Spending	196.9	191.8	-2.8%
Total Air Seats	8,277,192	6,310,232	1.3%

Table 5: Kaua'i Visitor Statistics

Kaua'i	2018 Final	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures (\$mil.) ¹	1,994.10	1,446.80	-6.1%
Visitor Arrivals	1,389,300	1,043,309	-1.7%
Per-Person Per-Day Spending	191.9	188.3	-3.1%
Total Air Seats	1,000,694	752,407	0.5%

Table 6: Island of Hawai'i Visitor Statistics

Island Of Hawai'i	2018 Final	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures (\$mil.) ¹	2,349.0	1,721.50	-4.3%
Visitor Arrivals	1,706,218	1,335,330	1.7%
Per-Person Per-Day Spending	183.7	178.30	-3.8%
Total Air Seats	1,335,064	1,005,054	-1.7%

Table 7: Maui Visitor Statistics

Maui	2018 Final	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	5,002.30	3,850.30	1.0%
Visitor Arrivals	2,914,912	2,321,871	4.7%
Per-Person Per-Day Spending	212.6	211.7	-1.7%
Total Air Seats	2,626,225	2,162,458	8.2%

Table 8: Moloka'i Visitor Statistics

Moloka'i	2018 Final	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	40.8	25.56	-9.8%
Visitor Arrivals	58,885	49,772	11.4%
Per-Person Per-Day Spending	143.3	125.2	-8.1%

Table 9: Lāna'i Visitor Statistics

Lāna'i	2018 Final	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures (\$mil.)	109.2	91.1	14.5%
Visitor Arrivals	75,010	68,151	18.4%
Per-Person Per-Day Spending	426.5	447.4	8.8%

¹ 2018 visitor spending includes, air, cruise and supplemental business. 2019 year-to-date expenditures do not include supplemental business.

GLOBAL SOURCE MARKETS

Table 10: U.S. West Market Visitor Statistics

U.S West	2018 Final	2019 Forecast	% Change	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures (\$mil.) ¹	\$6,588.4	\$6,831.5	3.7%	\$5,177.2	5.3%
Visitor Arrivals	4,203,894	4,509,772	7.3%	3,460,697	10.5%
Per-Person Per-Day Spending	\$175.8	\$175.6	-0.1%	\$173.8	-1.3%
Total Air Seats	8,121,002	8,494,568	4.6%	6,413,400	4.6%

Table 11: U.S. East Market Visitor Statistics

U.S East	2018 Final	2019 Forecast	% Change	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures (\$mil.) ¹	\$4,529.9	\$4,562.0	0.7%	\$3,596.7	2.5%
Visitor Arrivals	2,173,458	2,238,010	3.0%	1,752,473	4.0%
Per-Person Per-Day Spending	\$210.2	\$211.0	0.4%	\$212.1	1.2%
Total Air Seats	1,098,631	1,149,168	4.6%	909,856	5.4%

Table 12: Japan Market Visitor Statistics

Japan	2018 Final	2019 Forecast	% Change	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures (\$mil.) ¹	\$2,144.7	\$2,208.0	3.0%	\$1,609.3	0.4%
Visitor Arrivals	1,489,778	1,589,452	6.7%	1,152,900	3.3%
Per-Person Per-Day Spending	\$241.2	\$237.2	-1.6%	\$235.2	-1.7%
Total Air Seats	2,042,595	1,998,585	-2.2%	1,498,414	-1.8%

Table 13: Canada Market Visitor Statistics

Canada	2018 Final	2019 Forecast	% Change	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures ¹ (\$mil.)	\$1,108.5	\$1,085.6	-2.1%	\$783.9	-3.3%
Visitor Arrivals	548,702	541,572	-1.3%	387,962	-1.5%
Per-Person Per-Day Spending	\$164.4	\$165.5	0.7%	\$166.8	-0.1%
Total Air Seats	488,857	483,945	-1.0%	356,885	4.0%

Table 14: Oceania Market Visitor Statistics

Oceania	2018 Final	2019 Forecast	% Change	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures (\$mil.) ¹	\$1,045.2	\$984.1	-5.8%	\$671.5	-16.6%
Visitor Arrivals	415,764	389,557	-6.3%	274,122	-13.9%
Per-Person Per-Day Spending	\$260.4	\$265.6	2.0%	\$259.8	-1.1%
Total Air Seats	533,045	494,961	-7.1%	376,768	-6.0%

Table 15: Korea Market Visitor Statistics

Korea	2018 Final	2019 Forecast	% Change	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures (\$mil.) ¹	\$496.6	\$430.3	-13.4%	\$346.3	-7.6%
Visitor Arrivals	228,350	203,405	-10.9%	166,555	-5.7%
Per-Person Per-Day Spending	\$292.3	\$282.2	-3.5%	\$266.0	-5.5%
Total Air Seats	350,900	323,352	-7.9%	312,301	-11.0%

Table 16: China Market Visitor Statistics

China	2018 Final	2019 Forecast	% Change	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures (\$mil.) ¹	\$330.5	\$261.5	-20.9%	\$193.8	-28.8%
Visitor Arrivals	123,246	95,312	-22.7%	75,057	-26.1%
Per-Person Per-Day Spending	\$349.1	\$344.6	-1.3%	\$320.6	-7.6%
Total Air Seats	158,833	116,539	-26.6%	93,471	-22.9%

Table 17: Taiwan Market Visitor Statistics

Taiwan	2018 Final	2019 Forecast	% Change	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures (\$mil.) ¹	\$39.1	\$47.5	21.5%	\$47.4	59.2%
Visitor Arrivals	17,523	21,068	20.2%	20,771	52.8%
Per-Person Per-Day Spending	\$240.8	\$244.3	1.5%	\$250.9	7.4%
Total Air Seats	31,824	39,780	25.0%	30,600	28.2%

Table 18: Europe Market Visitor Statistics

Europe	2018 Final	2019 Forecast	% Change	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Expenditures (\$mil.) ¹	\$326.3	\$301.1	-7.7%	\$211.6	-17.1%
Visitor Arrivals	144,953	136,941	-5.5%	103,506	-6.8%
Per-Person Per-Day Spending	\$171.5	\$166.8	-2.8%	\$157.8	-10.0%

Table 19: Southeast Asia Market Visitor Statistics

Southeast Asia	2018 Final	2019 Forecast	% Change	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Arrivals	61,748	NA	NA	49,693	-3.4%

Table 20: Hong Kong Market Visitor Statistics

Hong Kong	2018 Final	2019 Forecast	% Change	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Arrivals	4,801	NA	NA	3,350	-10.6

Table 21: All Other Markets Visitor Statistics

All Other Markets	2018 Final	2019 Forecast	% Change	2019 YTD (Sept)	% Change YTD (Sept)
Visitor Arrivals	377,196	NA	NA	343,122	16.9

COMMUNICATIONS

During 2019, HTA worked to improve resident sentiment about the impact of tourism on Hawai'i's communities by letting them know about the numerous HTA-funded programs and events that benefit the residents throughout the state through traditional and social media. HTA utilized its social media pages on Facebook, Instagram and Twitter to share details about the programs and events it supports that help to perpetuate the Hawaiian culture, protect the environment, and benefit the communities.

Hawaii Tourism Authority
 Posted by Khoros Social Marketing
 November 8 · 🌐

Through our Aloha Aina program, **Kalanihale** has received support for its "Building the Next Generation of Resource Stewards" project. The project engages three motivated young adults to serve as apprentices in stewardship of Milolii's coral reefs, who in turn will engage community families to participate in stewardship activities.

Visit <http://bit.ly/2NtrgHg> to learn more.

#HawaiiTourism



... **Hawaii Tourism Authority is with Caroline Anderson.** ...

Posted by Marisa Yamane
 October 15 · 🌐

The Hawaii Agriculture Conference just started at the Hawaii Convention Center. HTA is proud to be a sponsor, and to support Hawaii's agriculture industry and agritourism initiatives.

#AG2019
 #HawaiiTourism



Hawaii Tourism Authority

Posted by Marisa Yamane
 September 19 · 🌐



KHON2.COM
Tourism Officials Explain Kuleana Campaign to Educate Visitors

... **Hawaii Tourism Authority** ...

Posted by Marisa Yamane
 September 10 · 🌐



HAWAIINEWSNOW.COM
Respecting culture among topics of HTA's new 'Kuleana Campaign' for visitors

HTA Social Media Videos

In October 2019, HTA launched a series of originally created videos on its social media pages that profile some of the HTA-funded nonprofits that are supported by tourism dollars.



TOURISM UPDATES

HTA held two tourism updates in 2019 – one in the Spring, the other in the Fall.

Spring Tourism Update

HTA's Spring Tourism Update was held at the Hawai'i Convention Center on March 6, 2019. It focused on managing tourism, featuring presentations, a luncheon panel with government leaders and Q&A sessions.

Fall Tourism Update

HTA's Fall Tourism Update was held at the Hilton Waikoloa Village on November 18-19, 2019. For the first time, this conference was held on Hawaii Island to help give it a tourism boost in the wake of the 2018 Kīlauea eruption. More than 450 people attended. There were panel sessions to discuss cultural tourism, sustainable tourism, and tourism trends. And HTA's Global Marketing Team members shared their brand marketing plans for 2020, with responsible tourism as a key component. During the Tourism Legacy Awards Luncheon, HTA recognized the people who are helping to battle Rapid 'Ōhi'a Death.



HTA TEAM

Chris Tatum

President and Chief Executive Officer

Keith Regan

Chief Administrative Officer

Pattie Herman

Vice President of Marketing and Product Development

Marc Togashi

Vice President of Finance

Caroline Anderson

Director of Community Enrichment

Jennifer Chun

Director of Tourism Research

Jadie Goo

Director of Marketing

Kalani Ka'anā'anā

Director of Hawaiian Cultural Affairs and Natural Resources

Marisa Yamane

Director of Communications and Public Relations

Minami Aoki

Tourism Market Manager

Evita Cabrera

Contract Specialist

Maile Carvalho

Finance Administrative Assistant

Tracey Fermahin

Administrative Assistant

Maka Casson-Fisher

Program Specialist

Leslie Centeno

Community Enrichment Program Coordinator

Minh-Chau Chun

Tourism Research Manager

Isabella Dance

Contracts and Administrative Manager



Anda Garel

Administrative Assistant

Laci Goshi

Tourism Market Manager

Carole Hagihara

Executive Assistant

Dede Howa

Manager of Hawaiian Cultural Affairs

Chael Kekona

Program Specialist

Talon Kishi

Budget and Fiscal Officer

Lawrence Liu

Tourism Research Statistician

Ariana Masuoka

Administrative Assistant

Cynthia Morita

Finance Assistant

Joseph Patoskie

Tourism Research Manager

Ronald Rodriguez

Contract Specialist

Chris Sadayasu

Tourism Market Manager

Michele Shiwaki

Administrative Assistant

HAWAII TOURISMTM



AUTHORITY

Hawai'i Convention Center

1801 Kalākaua Avenue

Honolulu, Hawai'i 96815

(808) 973-2255

hawaiitourismauthority.org

Facebook: facebook.com/hawaiihta

Instagram: [@hawaiihta](https://instagram.com/hawaiihta)

Twitter: [@hawaiihta](https://twitter.com/hawaiihta)

YouTube: youtube.com/hawaiihta