



*HĀLĀWAI KŪMAU O KE KŌMIKE ALOWELO
KE 'ENA KULEANA HO 'OKIPA O HAWAI'I*

BRANDING STANDING COMMITTEE
~~REGULAR MARKETING STANDING COMMITTEE MEETING~~
HAWAII TOURISM AUTHORITY

Pō 'akolu, 26 Ianuali 2022, 2:30 p.m.
Wednesday, January 26, 2022 at 2:30 p.m.

Hālāwai Kikoho 'e
VIRTUAL MEETING

Hiki i ka lehulehu ke hālāwai pū ma o ka ZOOM.
Webinar will be live streaming via ZOOM.

E kāinoa mua no kēia hālāwai:

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*Ma hope o ke kāinoa 'ana, e ho 'ouna 'ia ka leka uila
hō 'oia iā 'oe me ka 'ikepili ho 'oku 'i hālāwai.*

**After registering, you will receive a confirmation email
containing information about joining the webinar.**

Papa Kumumana 'o – Ho 'ololi 'Ia
AMENDED AGENDA

1. *Ho 'omaka A Pule*
Call to Order and Pule
2. *'Āpono I Ka Mo 'o 'ōlelo Hālāwai*
Approval of Minutes of the December 16, 2021 Marketing Standing Committee Meeting
3. *Ka Nūhou No Nā Hana Hokona Hā 'uki*
Sports Marketing Updates
 - A. *Hō 'ike a Kūkākūkā Na Mr. Tom Kiely E Pili Ana I Nā Pahuhopu A Ka 'akālai Hokona Hā 'uki*
Presentation & Discussion with Mr. Tom Kiely on Sports Marketing Goals



& Strategy

- B. *Ka Nūhou No Ka Ha 'awina Kālā I Nā Polokalamu Hā 'uki CEP*
2022 Community Enrichment Program Sports Awardee Update
 - C. *Hō 'ike a Kūkākūkā No Ka Hana Like 'Ana Paha Me Ka LA Clippers*
Presentation & Discussion on a Potential Opportunity with the LA Clippers
 - D. *Hō 'ike a Kūkākūkā No Ka Hana Like 'Ana Paha Me Ka LA Dodgers*
Presentation & Discussion on a Potential Opportunity with the LA Dodgers
4. *Ka Nūhou No HVCB & OMD/ Ko Socratic Holomua 'Ana Ma Ka Hō 'ike Noi 'i E Pili Pū*
Ana I Ka 'Āpana Ho 'okipa Malihini O Hawai 'i No GoHawaii.com
Update on HVCB & OMD/Socratic's Progress on the Hawai 'i Visitor Segmentation
Research Study for GoHawaii.com
 5. *Hō 'ike, Kūkākūkā, A Ho 'oholo I Ka 'Āpono 'Ana I Ka Hai 'Ia O Kekahi Kanaka Mana 'o*
A 'oa 'o No Ka Pāhana Hawai 'i Smart Destination
Presentation, Discussion and/or Action on Approval to Solicit a Consultant Related to the
Hawai 'i Smart Destination Initiative
 6. *Hō 'ike, Kūkākūkā, A Ho 'oholo I Nā Papahana Ho 'okele A Hokona Alowelo A HTUSA*
*No Ianuali A I Iune 2022****
Presentation, Discussion and/or Action on HTUSA's Brand Marketing and Management
Plan for January to June 2022***
 7. *Hō 'ike, Kūkākūkā, A Me Ka Hana E Pili Pū Ana I Nā Lula Hokona A GMT*
Presentation, Discussion and/or Action on the GMT's Marketing Guidelines
 8. *Kūkākūkā No Ke Ka 'akālai Ha 'awina Kālā I Nā 'Oihana Hokona A Me Ke Alaka 'ina No*
Nā Limahana HTA
Discussion on HTA's Future Global Branding Allocations Strategy and Guidance for
Staff
 9. *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*



HAWAII TOURISM AUTHORITY

Hawaii Convention Center
1801 Kalākaua Avenue, Honolulu, Hawaii 96815
kelepona tel 808 973 2255
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David Y. Ige
Governor

John De Fries
President and Chief Executive Officer

Papa Alaka'i loio. He hālāwai kūhelu kēia i 'ole paulele 'ia ka 'ikepili a i mea ho'i e mālama kūpono ai 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 Hawaii's Revised Statutes (HRS) § 92-4. The executive session will be conducted pursuant to § 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; and to discuss information that must be kept confidential to protect Hawaii's competitive advantage as a visitor destination.

Kono 'ia ka lehulehu e nānā mai i ka hālāwai a ho'ouana mai i ka 'ōlelo hō'ike kākau 'ia no kēlā me kēia kumuhana i helu 'ia ma ka papa kumumana 'o. Hiki ke ho'ouana mai i nā 'ōlelo hō'ike kākau 'ia ma mua o ka hālāwai iā carole@gohta.net a i 'ole ho'ouana i ka leka i Ke'ena Kuleana Ho'okipa O Hawai'i, [1801 Kalakaua Avenue, Honolulu, HI 96815](http://1801KalakauaAvenue.com) - Attn: Carole Hagihara-Loo. Inā pono ke kōkua ma muli o kekahi kīnānā, e ho'omaopopo aku iā Carole Hagihara-Loo (808-973-2289 a i 'ole carole@gohta.net), he 'ekolu lā ma mua o ka hālāwai ka lohi loa.

Members of the public are invited to view the public meeting and provide written testimony on any agenda item. Written testimony may be submitted prior to the meeting to the HTA by email to carole@gohta.net or by postal mail to the Hawaii Tourism Authority, [1801 Kalākaua Avenue, Honolulu, HI 96815](http://1801KalakauaAvenue.com) - Attn: Carole Hagihara-Loo. Any person requiring an auxiliary aid/service or other accommodation due to a disability, please contact Carole Hagihara-Loo (808-973-2289 or carole@gohta.net) no later than 3 days prior to the meeting so arrangements can be made.

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Approval of Minutes of the December 16, 2021
Branding Standing Committee Meeting



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**BRANDING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY
Wednesday, December 22, 2021, 2:30 p.m.**

Virtual Meeting

MINUTES OF THE BRANDING STANDING COMMITTEE MEETING

MEMBERS PRESENT:	Fred Atkins (Chair) Dylan Ching (vice Chair) Ben Rafter, Kyoko Kimura
MEMBER NOT PRESENT:	
HTA STAFF PRESENT:	Maka Casson-Fisher, John De Fries, Kalani Ka'anā'anā, Sherry Menor-McNamara, Sig Zane
GUESTS:	Shannon McKee, Sandi Weir
LEGAL COUNSEL:	Gregg Kinkley

1. Call to Order and Pule

Chair Atkins called the meeting at 2:30 pm. Mr. Casson-Fisher did the opening Pule.

2. Approval of Minutes of the November 15, 2021, Marketing Standing Committee Meeting

Mr. Ka'anā'anā said they can pull the recording to check if it's a typo to have it corrected, line five, page two. He said he is currently discussing the rebranding and he primarily dealt with Jay at HVCB in that discussion and Mr. De Fries because of their experience.

A motion was made to amend the minutes after checking the recording. Mr. Rafter seconded. A roll call was done and unanimously approved.

3. Presentation by Norwegian Cruise Line Vice President of Revenue Operations Ms. Sandi Weir on its Protocols for Safety and Resumption of Operations in 2022

Ms. Weir said Norwegian Cruise Line Holdings is coming back to Hawai'i. She said they are planning the first ship, Oceania Insignia starting in Honolulu and making six different stops in the Hawai'i islands, starting January 15th. She mentioned the ship is 750 pax, but will only be at 60% capacity, and after that week they will have the Pride of America restart her seven-day inner island voyage, January 22nd, she'll start her usual route. She said they have already had several ships launched in Europe, in the Caribbean, and other places. She said in summer they've done Mexico, along the Mexican Riviera and on the Gulf side, out of New Orleans. She said this has helped them put their safety protocols to the test, and with the new variant they are doing well. She said they are one of the only cruise lines that have 100% vaccination policy – 100% guests, 100% crew – no exceptions. She said besides the mandatory vaccines, they also have universal COVID testing, testing everybody before they get on the ship, and from January everyone will have to produce a PCR test that they tested at home before coming out.

She said they do pre-embarkation health screenings, staggered embarkation to make sure not everybody comes on at once, and only launching at 40% capacity. She feels they'll be able to mitigate any crowds on the embarkation. She said they also have a Public Safety Officer onboard monitoring all passengers as they come and go, and crew as well, and he is available for questions and for general support to their expanded medical team. She said they also have mobilization contracts with all the hospitals and quick response as needed, and they are all contracted out. She said they comply with CDC requirements with a memorandum of agreement with each of the Ports they go to.

She mentioned she has been working with the state, both the Department of Health and Harbor's Division Transportation to come up with their memorandum of agreement, and she reported that all terms have been agreed upon, so the agreement is just out for signature. She is hoping in early January everything will be set up successfully so they can launch services again.

Chair Atkins asked Ms. Weir how they and NCL fit into their protocols in regard to the four pillars and asked to touch on branding, sustainability, culture, and communities. He asked if there were any questions regarding safety protocols.

Mr. Casson-Fisher said there was a question for clarification, for NCL asking if it is 40% or 60% capacity.

Ms. Weir said the Insignia ship is going to be coming in, the smaller Oceania ship, at 60% and the Norwegian ship, the Pride of America, she's only going to be at 40%. She said they don't anticipate Pride of America will be full until mid to end of summer, and that is not due to

demand, it's just what they're comfortable with. She said Oceania is coming in prior to Pride of America, on January 15th to Honolulu for two days, and she rotates through a few other ports.

Ms. Menor-McNamara asked as they go to on land excursions, if they get tested when going back onto the ship, and if they go to the different islands, how are they getting tested in between or if they do.

Ms. Weir said they only test on the seven days should they show symptoms or feel unwell. They have rapid tests, and a full laboratory on board where they can conduct PCR testing on board, but they can't test them every day as they come back from excursions as it wouldn't be feasible. She said they also have quarantine cabins on board if they need to quarantine them, should they test positive until they get to Honolulu, at which point they would disembark them. She said they also have part of the Memorandum of Agreement, a housing agreement with a specific hotel where they would have to quarantine for 14 days.

Mr. Ka'anā'anā confirmed there was no further questions from the committee and Casson-Fisher confirmed there was no further questions from the public.

Chair Atkins asked Ms. Weir to elaborate how the cruise lines can help promote Hawai'i in different areas, such as the cultural sustainability, branding and promoting Hawaiian products and community.

Ms. Weir said she met with Mr. Ka'anā'anā and Mr. Regan a few weeks back in Honolulu and they updated her on the program they have, and they spoke about how the pillars line up on the Pride of America the route that HTA had. She mentioned the first one, cultural stewardship – she said they have a Hawaiian ambassador on board that sails with the ship, part of their permanent crew and it's a senior position. She said they're always lucky to get someone from Hawai'i who is passionate about culture, and they run education programs, weeklong on the ship and do demonstrations. She said they do a lot of guest engagement and go on some of the short excursions with the guests.

She also mentioned some of the new videos that they could blend into their embarkation talk and said it would be a great added feature as people are boarding, and as they come to the theater for the very first time to give them that Hawaiian feel. She also spoke about sustainability, saying the crew of the Pride of America are very proud and feel that they are residents of the island, and they do a lot of things to help the islands in minimizing the waste that comes off the ship, increasing sustainable sourcing. She said they get a lot of their products locally which reduces the amount that needs to come over by water or by air, and just for that ship itself, they've invested in emerging technologies where they can reduce some of their CO2 emissions, and they are committed to fostering a culture of awareness and respect for their

ocean's resources. She mentioned their program Sail and Sustain, and they put out as part of their ESG efforts, an annual report on their commitment to all of the pillars they have, and they publish the annual report and make sure they measure their commitment to the environment.

She mentioned their new environmental commitments they have this year where they're beginning CO2 offset, purchasing 3 million metric tons of CO2 offset over a three-year period to blend into the program. She mentioned community involvement where they always want to help the communities, such as hurricane relief campaigns, helping teachers and first responders, or hosting onboard events, or fundraisers, where the entertainment, food are all complimentary.

She said they also try to bring as many Hawai'i products as they can on board to help the small businesses.

Chair Atkins asked Ms. Weir to touch on the branding aspect. He mentioned some of the people that don't fly in on time to get to the ship and just visit Honolulu. He asked what percentage of the passengers are first time to Hawai'i, that might visit again at another time.

Ms. Weir said based on their 2018, 2019 volume, they saw upwards of 65% to 70% either doing a pre-visit or a post visit. She said if they do a pre, it's mostly Honolulu, if they do a post, they see them going back to one of the other islands. She said for first time visitors they started an air program, with a promotion, buy one air ticket, get one free, so it brought it new markets from faraway places, and now she said the big markets for Hawai'i is the Midwest and the East Coast.

Chair Atkins mentioned the in-room TV channel and asked if they could possibly get some of their HVCB rooted messages on there for the passengers to see, and also direct them to GoHawai'i.com so they can see all the islands.

Ms. Weir said they would get that done, working with someone on the committee.

Mr. Casson-Fisher brought a question from the public addressing NCL addressing employee availability issues asking how they're addressing this.

Ms. Weir said they're having an issue with hospitality workers, they had to increase wages quite substantially as well as signing bonuses. She said as soon as they complete one contract and have a bonus at the back half for them, they complete their second contract, another bonus at the last half. She said they need to overhaul their wage program and what they're paying, the positions earned, and come up with something a little bit better and more dynamic for them. She said they have the benefit of free room and board, but the main issue is making sure they

have crew ready – they have almost 100% new crew underneath the leadership they have. She is hoping to get enough people through enhanced wages.

Mr. Atkins asked that as they're mandated to have Americans compared to foreign, how is that working in Hawai'i.

Ms. Weir said they did some hiring in Hawai'i, but they didn't get too many coming in. She said they've never been able to properly compete against the hotels, where they combine their homes and work in the community versus on the ship. She said they are only allowed 25% to be non-passport holders so it is quite a challenge.

4. Presentation by Ms. Shannon McKee on Cruise Industry Updates and Resumption of Cruise Operations in Hawai'i for 2022

Ms. McKee said Norwegian has been doing an outstanding job in the relaunch, but if you take a look at the relaunch and what has been happening in the restart, this comes directly from cruise industry news. Cruise started back up in September of 2020 very small scale, In the U.S. the first ship was in June, Royal Caribbean in Miami, and since then there has been an increase. She said Alaska opened in the summer, Galveston, Miami and Fort Lauderdale. She said they are seeing ships sailing successfully using all the protocols in place. She mentioned the top brands, Carnival and Royal being the two largest of the international cruise brands, followed by MSC and Norwegian cruise line, as far as how many ships have been sailing in December of this year. She said there is a lower capacity for Norwegian cruise line, and they are seeing this across the board with all the cruise vessels, as they are controlling their cruise capacity.

She said Norwegian is 100% vaccinated and most of the lines out there are nearly 100% vaccinated, but many of the brands are allowing for religious reasons or for medical reasons to have an exemption. She said they're also requiring proof of negative COVID tests prior to embarkation, as well as requiring antigen testing. She said there is also safety screening, mask requirements, hand sanitizing, and controlled capacity. She commended the cruise lines as always cooperating with sanitizing and cleanliness that continues.

She also mentioned the different filtration systems on board, similar to the airlines. She said they also do contact tracing for guests, if they do identify a case on board, and said they have also expanded their medical facilities as well as they have testing capabilities on board, including PCR testing. She said the cruise lines with Omicron have been in the news and so they are enhancing their health and safety protocol calls. She said they saw them to relax a bit with masks after the Delta wave, but it is mandatory now again. She said they're hoping to see the

cruise lines in January, based on the schedule that are intended to come in, dependent on the MOAs signed. She said any cruise lines coming into Hawai'i have been working with the department of transportation, to put in place their memorandum of understanding so that they know exactly what will happen when the cruise lines enter. She said they must have transport agreements with a local provider, housing agreements with the local provider, as well as medical agreements with a local provider which is outlined in their memorandum of agreement. She said once the memorandum of agreement is signed, the intent is that the first ship that would touch Hawai'i would be the Grand Princess on January 9th.

She mentioned the other cruise lines intended to call into Hawai'i - The Carnival Miracle, the Ruby Princess, The Konningsdam, Oceania Insignia and The World. She mentioned something important they learnt from the DOT last week is that the cruise lines all mandated must come into Honolulu first – this is part of the memorandum of agreement.

She reminded everyone of the benefits of the cruise industry - the fact that a lot of times cruisers are first time cruisers, sampling all the islands in Hawai'i. She said there is natural sustainability built through crews, through the existing infrastructure, so there's a limited amount of cruisers that actually come into Hawai'i. She said they are great promoters and ambassadors to the state of Hawai'i. She said they also leave a smaller footprint because the majority of the guests are on organized tours and excursions, whether they're taking them through the ship or they're making their own private excursions, they're not renting the cars and going into the communities.

She said that especially the international cruise lines primarily come in on the shoulder seasons, in September, October when tourism is a little bit lighter, so it enhances some of the local providers that need support in the shoulder seasons. She said they do provide great education. She said they have five days at sea prior to entering into the state of Hawai'i, so it's a great time for them to educate their guests on the culture of Hawai'i before they come into the community. She said they support the local community, support entrepreneurs, they use local providers when they come in, looking for local talent to support programs that they come and use when they come into the state. She said they also do a wonderful job of distributing the guests between all the major Hawaiian Islands, so the guests get to see all the islands, so they can decide which of the islands they like best before they come back and visit the state again.

Ms. Menor-McNamara asked if they are working with anyone to ensure local products get on the ships, letting them know the local retail places on shore.

Ms. McKee said each cruise line is different with regards to sourcing locally. She said all the cruises try to bring a local element on board, but she said it's an individualized question she has

to ask each individual cruise line but said she will find out what they're sourcing from the islands, and it is something they all aspire to, to bring that local flavor onto the vessel so that they can deliver that to their guests.

Ms. Menor-McNamara said there are organizations that may be easy to reach out to, a more coordinated effort, whether it's a manufacturing association or other organizations.

Ms. Kimura asked if The World is a residential cruise and Ms. McKee confirmed it's 100 guests. Ms. Kimura asked if they could limit the capacity because each room is owned by the owner, and Ms. McKee said she is not sure on the limiting capacity, but right now the ship traditionally can carry up to 200 guests, but they're only anticipating a hundred guests, so they're at 50% at the moment

Mr. Ching said the two key things he is taking from this is the local products and the messaging and what they should all aspire to. He mentioned the plastic flowers in the airport. He asked if when they are allowed to tour, there can be representatives showing the local products.

Ms. McKee said she will put a request in to each of the brands. She said Princess and Holland America are their frequent visitors to the island. She said she will reach out to them so see when they can get visitor passes. She said she has recently started working with the entertainment director getting a better understanding of exactly what they're doing and where they're hiring so they can share more of the messaging of Hawai'i.

Mr. Ka'anā'anā mentioned the FAM trip they'll do later with the cruise executives as a really great opportunity for them to leverage having those guys in person in town and being able to connect them directly, to make sure working with Ms. McKee and the team that they can build an itinerary for the FAM, that the board approved for later in 2022 to make sure that those connections are made and those relationships established or reaffirmed.

Ms. Weir said they welcome anyone anytime and they have somebody full time to reach out to for tours and questions.

Chair. Atkins mentioned they were doing FAM trips for many years but then had to stop because of budgets cuts. He mentioned they were very eager to listen and it's important to get content on the TV, showing GoHawai'i as well. He said this way the merchants can see what's good on the island, where they make ukuleles, as an example. He said they could have a craft fair on the docks as people come in to give that local feel. He said he hopes they'll follow NCL's lead. He said there is a lot to benefit from the FAM trips so the industry can capitalize on it in a very positive way.

Casson-Fisher confirmed there was no questions from the public.

Before Mr. Ka'anā'anā did his next presentation, he wanted to mention the DOT elements Chair Atkins had talked about, such as getting permissions to do different things. One avenue for that is the advisory committee that Mr. De Fries convenes amongst the department heads that are participating in that forum. He said they can also bring it up at that forum as well.

5. Update on Japan BMMP and the Process to Get it to the Full Board

6. Update on USA BMMP and the Process to Get it to the Full Board

Mr. Ka'anā'anā consolidated his presentations for both agenda items 5 and 6. He mentioned their global marketing teams from Japan, Canada, Oceanic, Korea, and China all went through a similar process to develop their brand management and marketing plans. He said it started with an initial deadline back in October with their staff internally. He said there was some back-and-forth iterations between HTA and the GMTs. He said it started with a process that very closely mimics and mirrors what the RFP process was. So, he said all of them were given the same amount of time, all of them had the same outline to use, and so it was all very clear for them how to submit their BMMP. He said it will be presented to everyone at the meeting. He said that was the process they undertook to develop brand management and marketing plans.

He also wanted to give an update on the various contracts, who the lead contact is for each contract, the contract start date, as well as the end date, as well as the period or the options that they have available to them, an allocation of funding to each market for calendar year 2022. He said these were contracts that were already encumbered and signed back before the fiscal 2021 year ended and close. He said they're all in place, encumbered and ready to go, but they've not been issued a notice to proceed, but some of that is dependent upon market conditions and on their review, discussion and potential action at the full board meeting on the BMMPs. He said the first trigger is the approval of the BMMPs for 2022, and then following their approval, it would require notice to proceed from there.

Chair Atkins mentioned all the times they thought they would start up and then it got postponed because of Omicron. He said some countries shut down altogether, and some weren't letting anyone out. He asked what the timeline is and is MMA going to let them know their best timeline. He said they need money to carry the staff through this period as they've been carrying them for two years. He asked how much money the MMA are uploading into the front, middle and the half back half of 2022.

Mr. Ka'anā'anā mentioned the triggers they have available to then that would allow the contractors to begin work, one, the approval of the BMMPs - he said if the board approves

them then we would still have another trigger and that would be a notice to proceed. He said until that happens, nothing can go forward. He said at the meeting they will show their current market insights where they can let them know what the current travel restrictions are, current COVID climate, and economic outlook, which will be presented in the first part of their presentations of the BMMP. He said this will help them make better decisions, from a policy standpoint to direct staff. He mentioned the budgets and the allocations across on a monthly basis by major program.

Chair Atkins asked if the money they gave if most of them went to the maximum amount and Mr. Ka'anā'anā confirmed this to be correct.

Mr. Ching asked for the hypothetical marker that would be perceived as the trigger. Chair Atkins said it's a tough question to answer.

Mr. Ka'anā'anā said what he would prefer is for the group to give experience and input, if they think about what they're producing and if they think about the campaigns they've developed, they're about awareness, about creating - an idea of what the Hawaiian islands are about in the potential mind of a traveler coming to a Hawai'i. He said they are not about conversion. He said the purpose and intent is very much long-term branding strategy, as opposed to a short-term conversion and recovery strategy. He said everything they're trying to do right is focused around educating their visitors, how to be respectful guests when they arrive and again, creating a new expectation of what the Hawaiian Islands are in their mind.

Ms. Kimura asked that seeing that the format has changed, will the committee hear the plan or review the plan, or will the planned presentation go directly to the board.

Chair Atkins confirmed this saying the chair wanted more input with the entire board and there was 50/50 on that, but that's the way they're going this year. He mentioned North America to be determined, Japan did not need an RFP. He said that as this is his first meeting, he wanted everyone's input on moving forward, whether it's Zoom or in-person. He said the next board meeting is very important as it's a new year and they need to know they can operate. He said the check and balance was good.

Ms. Menor-McNamara asked when was process changed or decided on, were there additional reasons why, other than not being able to discuss the U.S. market and others and if it has been discussed more thoroughly at the board meeting?

Chair Atkins said it was changed about three or four meetings ago, then it went back to them having a meeting prior to the board meeting. He said they will do a deep dive in to sports as that's the one thing not finalized this year. He said there were some contracts they

encumbered, like the PGA and a couple of other ones. He said they want to make sure they're on track with about a million and a half dollars, how they want to do that, where are they going to put it and what are they going to ask from the people giving the money, and what's the return on investments going to be. He said they'll be listening to 5 major markets in the first meeting.

Ms. Kimura said she thought the purpose of changing the bylaws was that any board member can participate in meetings and, and speak, but they are not able to vote, but they can comment.

Chair Atkins said any member can ask a question on Zoom as they are like the public.

Ms. Kimura asked if the board members wanted to participate shouldn't they be a panelist too.

Chair Atkins said that is correct, but they might not be available to be on the panel. He confirmed that Mr. Kinkley said from a lawyer standpoint, they're allowed to be part of the public so they can ask any questions that they want. Mr. Kinkley confirmed they can attend and listen, but they cannot vote. Mr. Kinkley said they're not included as panelists here – that it's just a safety precaution so they won't be swept in with the vote, because they cannot vote.

Ms. Kimura suggested that maybe in the future, the in-person meeting may be better so that the other board members can participate better.

Chair Atkins said that's something to be discussed between everyone and that he will go with the majority vote.

Mr. Rafter asked Mr. Kinkley if the Zoom meetings will be going away anytime soon and Mr. Kinkley replied that when the calendar year 2022 starts, the new OIP law becomes effective, which allows for zoom meetings on an ongoing basis as one valid option.

Mr. Arakawa said the whole reason why they set up the exo officio members and allowed all 12 members to participate is so that they could attend these committee meetings or important things to discuss and participate in the discussion but not vote. He said it's important to finalize this decision so they don't have to waste time discussing it. Chair Atkins asked that Mr. Kinkley adds it to fit under one of the items for tomorrow to touch on that.

7. Presentation and Discussion on HTA's Sports Programs for 2022

Mr. Ka'anā'anā said the RFP discussion on how the \$1.5 million could be expended is robust. He identified a goal at the programmatic level which was identified back in 2017, which is to

elevate Hawai'i as a premier sports destination – the goal of the sports marketing program. He mentioned the objectives - make effective use of state taxpayer funding, foster community wellbeing, improve quality of life by supporting events that are favorable with Hawai'i resident views, expand awareness of Hawai'i in the U.S. and key markets internationally through these events that they support, strengthen Hawai'i's standing as a setting to host U.S. and international sports competitions and to promote the convention center sports courts to attract U.S. and international events.

He said the board did invest around \$1 million a few years ago on all of the sports equipment that they utilized in the center for volleyball, basketball, etc. He said the strategy is delivering maximum benefit to the state, looking at the three big pillars - community benefit - what's the community benefit of hosting these events, any charity done as a result of them, brand alignment, marketing value and audience demographics. He said brand alignment also means how well your brand/event/sport aligns with their brand at their values and then the economic impact, including actual visitation as a result, and then direct spend. He said they've also kept in place the Ascendant model which takes a portfolio approach with marque events, signature events and Hawai'i authentic events. He said to his knowledge it has not been amended by this board as a strategy, for the model of what they're looking to do.

He mentioned in fiscal 2022, they have the last year of the PGA, with some of the results from 2019, 2020 and 2021 for the three tournaments, something they have already approved and allocated out of the fiscal 2022 budget. He mentioned Chair Atkins' point of the allocation of \$1.5 million in the fiscal 2022 budget and mentioned a few things to take into consideration, one, a singular RFP for sports marketing and sports events. He said they can work together on describing and determining what the elements of the RFP look like, and collectively have people compete as a whole for that \$1.5 million, or an alternate strategy may be to divide up that \$1.5 million amongst portfolio tiers, but he thinks the best practice for them is to issue an RFP. He mentioned that some have argued, and they could take a look at potentially sole sourcing some of them because these are event properties that own the IP related to their event, and sometimes even in particular to their sport, so there may be a basis on which they could apply to the SPO for sole source exemptions for some of these sports properties, which would be a much longer route. He said it will be more advantageous to the state to conduct an RFP and said it's his recommendation to the board as the timing is tight. His ask of the board is to reduce the admin weight.

Chair Atkins said it will be beneficial to the committee to see how some of these stacked up from an ROI point of view.

Mr. Ka'anā'anā showed a recap of past performance for events. Polynesian football hall of fame - no YouGov study, this is the \$300,000 set aside for event evals and will be how they get some of these results. They didn't do one for Polynesian football hall of fame in 2020 because of the pandemic. He said this event has real community benefit – children of Polynesian descent are in front of the best recruiters for D1 schools and professionals, so it's good that it supports the youth. He mentioned Maui Jim – attendance, over 7,000, marketing value - \$127 million and economic impact of 22 million. He also said it's a 12-game tournament and they did youth clinics and community events leading up to the game, always trying to hit the three pillars of the strategy. He spoke about the ESPN Hawai'i bowl and Diamond Head Classic, 2018 was the last time that had a study for this, economic impact of over 7 million, marketing value - \$29 million. He mentioned Ironman world championships - 68% of residents believe it's important for the HTA to host this, 80% of residents will probably/definitely attend.

He spoke about the LPGA Lotte championship - 9.2 average event satisfaction score amounts, 94% of residents believe that the event makes a positive contribution to the image, appearance and reputation of Hawai'i, 81% of the residents believe the event is important to local community. 90% of total attendees are likely to recommend the Lotte championship, direct economic spend –\$ 12 million with good attendance, both from attendees, as well as residents.

He spoke about AVP - percent of residents who agreed that they're likely to return to future AVP events and Hawai'i was 96%, locals allocated the most points to community impact when asked about the important benefit of AVP. He wanted to highlight this event because this is an event where they took volleyball clinics and the professional beach volleyball players to communities across Hawai'i. He mentioned Invesco series, canoe paddling, sup races, surfing competitions, marathons, fishing, football, and rodeos. He mentioned the Moloka'i Hoe - it was an investment of \$25,000 generated \$268,000 in visitors spend, they had teams as far away as Brazil that came in and participated, there's often 10 to 12 paddlers, depending on the age of the paddlers that come as well as all of their friends and family that travel with them, so ROI calculations and resident feedback is positive. Pana'ewa Stampede - 93% event satisfaction score, 92% of residents said they'll probably definitely attend the rodeo next year.

Mr. Rafter said he is confused what the RFP is for. He said he thinks they need to spend a modest sum of money, take a step back and bring on somebody independent of all the organizations for a reset strategy, to suggest where they should be investing in the future. He mentioned two things – they have a natural environment where there are some sports that they should own - everybody in the world should associate them with surfing, not Huntington beach, and they already achieved that with Ironman previously. He said he wants to see them do new and emerging sports and figure out how they can be the place that's associated with

them. He used XGames as an example. He said they should take a step back from looking at spending +- \$6 million for the pro bowl, and then taking a step forward to develop the entire sports strategy for the next five or 10 years.

Ms. Kimura asked how much they allocate for a sport budget, and Mr. Ka'anā'anā confirmed they haven't allocated any of the \$1.5M sports budget for 2022, besides PGA at \$2,177,889.

Mr. Ching spoke about how satisfied the events are with the support they received and is there a chance they could lose some because other places are able to support better.

Mr. Ka'anā'anā said they're nowhere in the realm of where they used to be. He told Mr. Ching he is more interested in the value that the event brings to Hawai'i and less about the funding that it takes. He spoke about the ROI on the last 2015 pro bowl which was about \$5 - \$6 to one, looking at a smaller community-based event was \$36 to one on direct economic impact. He said that bigger isn't always better, if you use direct economic impact and direct visitor spending as one metric to guide the decision making. He said they're moving beyond that and expanding it - what are the community benefits? He says there are more advantageous ways for them to attract professional sports athletes for a different purpose other than the actual game.

Mr. De Fries said he liked Mr. Rafter's approach to having somebody who can reset all this. He said right now they have inquiries from ESPN. He also said they're not going to get funding this year for the Diamond head basketball classic and the bowl game.

Mr. Ka'anā'anā said at his direction they could always carve a portion of the \$1.5 out to solicit and do an RFP for a consultant to give them an assessment.

Chair Atkins asked for the dates of the events and Mr. Ka'anā'anā confirmed Diamondhead Classic is 22 - 25 December, the Hawai'i bowl is 24th December.

Chair Atkins said it's a shame it wasn't brought to their attention earlier. He said the people that came out for these events may not be large, but they bring families and spend is high. He went back to what Mr. Rafter said and he said they have a budget right now in a place for \$250,000 for an airline consultant and he questioned why they need one at that level. He said it would be good if they could use some of that money for a sports consultant, because when looking at the budget, out of the +- \$90 million, it's very low in sports. He said it's probably three and a half percent of their budget. He said next year will be higher because their budget will be less, so reiterated getting someone to look at it.

He said sport is very dynamic to brands because of the way things are going with social media, people like to see things on their phones. He said they need a social network marketing

program in anything that they do moving forward, that won't cost too much. He said social media is a big part of what people are doing now and how they find information, what they're watching, where they're going, why they're going. He said it's also not just sports, it could also be Merrie Monach, that has incredible branding. He said brand goes way beyond their events. He said TV coverage is also big.

Mr. Ka'anā'anā said they'd have to RFP for the consultant, so suggested having the pricing discussion to allocate funds and said they are having it publicly. He asked if they feel it's appropriate to include the budget allocated against a consultant for sports and the RFP and Chair Atkins said he would ask the committee.

Mr. Ching asked if they will be taking it out of the \$1.5 million and Mr. Ka'anā'anā said no, that they can discuss it where it will come from. He said there are a couple of places that it could come from. He said the budget committee discussed in their meeting a couple of days ago about some opportunities based on staff's recommendation, not to move forward in fiscal 22 that frees up some funding as well as the \$1.5 million that's actually directed right now at sports that they could shave off the top. He said the place is less of the issue as much as it is about, do they want to disclose in the RFP how much they're budgeting, as it helps him, and his staff put the RFP together expeditiously.

Chair Atkins asked Mr. Ka'anā'anā when they need that as the budget committee meets before the next marketing committee, and it could be discussed. He said maybe they need a new look at things and see if they spend it in a larger area and cut out other programs. He said he didn't like to take it out the \$1.5 million as it's already been cut in half. Mr. Ka'anā'anā said it's at their discretion where it comes from. He also said they've decided not to move forward on several line items at the budget meeting that could create the room for this consultant.

Mr. Rafter said him, Chair Atkins and Ms. Kimura were on budget call the previous day. He said they freed up a lot of money, so said they're flexible in terms of where it comes from. He also said they need someone with a short RFP response defined in terms of what the strategy would be based on HTA's strategy and the four pillars. He said a reminder – one of the pillars, bringing people to Hawai'i – one of the most important factors. He said that although golf is less popular with the locals it meets certain income demographic the legislators would like from them. He reiterated that they must own surfing.

Mr. Ka'anā'anā showed the previously published RFP they did back in 2016, that was utilized to bring on Ascendant with the proposal that they can look at when wanting to bring on a consultant.

Chair Atkins said they would need time to digest the info but suggested that money can go to YouGov to look at it. He said all the events that are on the board are supposed to give an ROI. He said what's good about a second party, is they're not putting on the event but just looking to see if the event hits the benchmarks and they compare it to the contract they signed with the person they're giving the money to. He asked for an estimate of what they're getting for the \$300,000 and what events they will scrutinize, which will help them make a good investment. He asked if the 35 programs include sports program as well, right across the board.

Mr. Ka'anā'anā said they haven't set the list of 35, they get 35 surveys and studies, but they haven't determined who's on that list yet. Chair Atkins said it would be good for the market.

Mr. Ka'anā'anā asked his team or Jen to make a note to bring that list of the events that YouGov studies to the board. He mentioned the consultant scope and said the RFP needs to be open at a minimum 30 days.

Chair Atkins says they can't sole source which they used to be able to do. He said the consultant decision should be made soon. He said they need to look at what Mr. Ka'anā'anā gave them from Ascendant, see if it's affordable and then look at a five-year plan. He said they should follow the PGA branding model. He brought up Ms. Kimura and Ms. Manor-McNamara concerns about having a board meeting and said those type of discussions will be totally vetted 100% before going to the board. He mentioned the budgets – Japan - \$9 million, U.S.A. - \$22 million. Mr. Ka'anā'anā said it would be good to discuss this in the following days meeting. He mentioned that it's the last agenda item and that they must all think about what an appropriate budget is to be discussed.

Ms. Kimura voted to have the consultant revise the RFP, and the scope of the consultant reflecting what they want from the sporting events.

Mr. Ka'anā'anā asked Ms. Kimura what the deliverables would be for the consultant, to be the final draft of the RFP that they release. Mr. Rafter said he thinks the goal will be not to say what 35 events they need to pick. He said one goal in his opinion is to step back and create a roadmap based on what HTAs mission is for sports. He said he thinks that what Ms. Kimura is saying is that it should be a very narrow scope before they go out and sign up 50 events. Having the roadmap will help determine the right amount next year to put towards sports and get support from key constituencies to community and the legislature to do it.

Mr. Ka'anā'anā said the board, back in 2017, added that strategy as five years, taking it to 22 as the end.

Chair Atkins said one of the challenges from Ascendant was that the company was no longer doing that type of consulting, so the consultant had moved on. He said at that level it was \$250,000. He said they need a smaller budget to get them in line with what they want to go after, and then go after somebody that can really bring in some big events. He reiterated making sure there is social media interaction for everything they do, big or small events. He mentioned Polynesian hall of fame and said that was encumbered with other money through the CEP program and Mr. Ka'anā'anā confirmed this to be correct.

Mr. Manor Mcnamara asked if they want the consultant to come up with a strategy as they move forward for sports, and if they must also help bring sporting events here as that's what Ascendant did as well.

Mr. Rafter said his opinion would be the former just to put the strategy in place. He said to spend a couple of hundred thousand dollars so they can spend multiple millions going in the right direction and then the events will come to them later. He said he'd rather be out targeting the events they want than having Mr. Ka'anā'anā and his team answering phone calls from 82 different events that want to be in Hawai'i. So, a succinct defined budget will be good.

Ms. Menor-McNamara said there was a conflict previously - Ascendant also played a role in tracking some events to Hawaii which didn't sit well.

Chair Atkins said their goal was to try to bring in some semi/major events to Hawai'i. He said there was a consultant that went out to look for the big events and present it to the marketing committee, then presented it to the board with a couple of programs. He said in that package, they gave them good data on the ROIs, the television aspect of it, the attendance, and all they required. He said they can talk to their legislators and see where they are on a budget for sports for 23, then go for proposals. He said it would be nice to have someone full time reporting back.

Mr. Ka'anā'anā mentioned Ross who they just onboarded with sports experience who helped prepare the PowerPoint from the meeting. He said Ross has great experience in that regard. He mentioned the original contract with Ascendant that was around \$700,000 but will confirm with Mr. Casson-Fisher.

Chair Atkins thought it a good idea and had heard from Hotelier how impressed they were with Ross. He said they must make use of the talent they have.

Mr. Ching reiterated he liked the consultant idea and he spoke about getting back to the precious sports goal in budget. He also mentioned he likes the holistic approach. He said even if they're not larger events, as long as they're helping in the community and falling within their

pillars. He said they need to invest in all the events like the Polynesian with the same energy as the PGA, which he also agrees they should continue to do.

Mr. Ka'anā'anā said there is a revised PowerPoint with some last-minute changes, as there was an error on the sports one – the file will say renamed. He said Carol will update the packet and redistribute it to the public, the website and members.

Chair Atkins addressed Mr. Kinkley if he could bring the topic up that some members discussed about whether they do the whole MMAs or some of them and not do a whole board meeting. He referred to the members to see if they wanted him to address it in the meeting the following day as he said that Ms. Kimura had some concerns.

Ms. Kimura confirmed that is what she would like. She thought there was a better method of opening up the meeting to the entire board and agreed that she wanted board members that aren't committee members to be panelists if they wanted to be.

Chair Atkins said it would be up to Mr. Kinkley, so Mr. Kinkley said the current state of the law with OIP and pursuant to their bylaws says there is no legal reason why the ex-officiate members cannot be in the meeting as long as they do not vote. Chair Atkins said he has no problem with that. He asked that Mr. Ka'anā'anā put it out to everyone that they can go on and listen and be on the screen for future meetings.

Chair Atkins thanked everyone who took the time to come onto Zoom.

8. Adjournment

Ms. Manor- McNamara made a motion and Ms. Kimura seconded.

Chair Atkins took a roll call to adjourn, and it was agreed unanimously.

Chair Atkins adjourned the meeting at 4:24 pm.

Respectfully submitted,



Sheillane Reyes

Recorder

A.

Presentation & Discussion with Mr. Tom Kiely on
Sports Marketing Goals & Strategy



HTA Sports Branding

The HTA Sports Branding Team has conducted meetings to discuss several of the major issues, goals and strategies in the specific area of sports marketing and branding. It has been determined that it is best for this committee to focus on the very major points as outlined herein.



HTA Branding Goals

1. Extend the brand image and marketing of Hawai'i
2. Generate Community Benefits
3. Generate Economic Benefits

Strategy

- Partner with sports/participation events that enhance the image, reputation, brand and culture of Hawai'i.
- Due to budget limitations, select those events and action steps that will produce the greatest impact.
- Mandate that event producers include a community benefits package as part of the HTA partnership.
- Pursue potential for selected events to be featured in the larger destination marketing plan through the HTA agency – HVCB.
- Target events that would have impact in Hawai'i's major source market areas.
- Target major championship events.
- Consider “media only” sports related packages [non-events] featuring Hawai'i . [i.e. Netflix series, ESPN 30 for 30, major Meta campaign, digital marketing platform, etc.]



Conclusion

This working group feels that it is appropriate to provide direction and leadership to the HTA staff and then empower the staff to take on the initiatives which support the greater and more important elements of goal and strategy. The HTA staff will present its tactical plan to this committee and the committee may, from time to time, provide advice and recommendations.

B.

2022 Community Enrichment Program Sports Awardee
Update

COMMUNITY ENRICHMENT PROGRAM AWARDS 2022 - SPORTS



COMMUNITY ENRICHMENT PROGRAM

Surfing & SUP	Award
Moloka'i Holokai (Stand Up Paddleboard Race)	\$36,000
MOLOKA'I 2 O'AHU Paddleboard World Championships	\$40,000
Kauai & Oahu Boogie Boarding Events	\$15,000
Duke's Oceanfest	\$55,000
Hawaii Adaptive Surfing Championships	\$40,000
Total	\$186,000

Fishing	Award
61st Hawaiian International Billfish Tournament	\$30,000

COMMUNITY ENRICHMENT PROGRAM

Outrigger Canoe	Award
Na Wahine o Ke Kai Outrigger Canoe Race	\$20,000
Queen Lili`uokalani Long Distance Outrigger Canoe Race	\$51,650
The Pailolo Challenge Outrigger Canoe Race	\$20,000
King Kamehameha Day Inclusive Race Day	\$20,000
Total	\$111,650

Marathon	Award
Maui Marathon & Half Marathon	\$35,000
Kaua'i Marathon & Half Marathon	\$43,700
Total	\$78,700

COMMUNITY ENRICHMENT PROGRAM

Rodeo	Award
Pana'ewa Stampede Rodeo	\$70,000
2022 Paniolo Heritage Rodeo	\$15,000
Molokai Paniolo Heritage Kamehameha Rodeo & Workshop	\$20,000
Total	\$105,000

Football	Award
Polynesian Football Hall of Fame	\$75,000
Gay Bowl XXII · Honolulu 2022 (Flag Football)	\$25,000
Total	\$100,000

- C. Presentation & Discussion on a Potential Opportunity with the **LA Clippers****
- D. Presentation & Discussion on a Potential Opportunity with the **LA Dodgers****

Sports Partnership Proposals

- LA Dodgers**
- LA Clippers**

Event Evaluation Criteria

- Media Value
- Community Involvement
- Economic Impact

SPONSORSHIP EVALUATION – LOS ANGELES DODGERS

INVESTMENT: \$2,206,750 (Three-Years 2022-2024)

MEDIA

COMMUNITY

ECONOMIC IMPACT

BRAND FIT

- Broad awareness play for Hawai'i, rather than perception changing for the brand.
- Does not provide the ability to advance Mālama Hawai'i brand messaging.

LA DODGERS HAWAI'I VISIT

- Kids Clinic and Meet & Greet with minimum of two current or former players, coaches or executives. Dodgers to provide video recap for marketing purposes.
- HTA to cover travel/accommodations costs.
- Valuation: TBD

ECONOMIC IMPACT FORMULA

- Measures are needed to determine economic impact (attendance, room nights).
- Valuation: TBD

U.S. AUDIENCE

- Reaches LA Dodgers fanbase with some alignment with the Hawai'i target audience.

LOCAL AUDIENCE

- TBD

MEDIA POV

- Does not align with U.S. brand strategy, messaging strategy or national media strategy.
- Media Valuation: \$445,000
- Investment Total: \$2,606,750
 - 1st Year: \$700,000
 - 2nd Year: \$735,000
 - 3rd Year: \$771,750

COMMUNITY POV

- TBD

SPONSORSHIP EVALUATION – LOS ANGELES CLIPPERS

INVESTMENT: \$725,000

MEDIA	COMMUNITY	ECONOMIC IMPACT
<p>BRAND FIT</p> <ul style="list-style-type: none">→ Broad awareness play for Hawai'i, rather than perception changing for the brand.→ Limited ability to advance Mālama Hawai'i brand messaging.	<p>LA CLIPPERS HAWAI'I VISIT</p> <ul style="list-style-type: none">→ One or two 2022-23 NBA Preseason games will be played on O'ahu.→ Training Camp week on O'ahu with community impact activations: one day Youth Basketball Clinics, one VIP Clinic/Meet & Greet→ Support one school with computer lab refurbishment (or similar).→ Valuation: TBD	<p>ECONOMIC IMPACT FORMULA</p> <ul style="list-style-type: none">→ Measures are needed to determine economic impact (attendance, room nights).→ Valuation: TBD
<p>U.S. AUDIENCE</p> <ul style="list-style-type: none">→ Reaches LA Clippers fanbase with some alignment with the Hawai'i target audience.	<p>LOCAL AUDIENCE</p> <ul style="list-style-type: none">→ TBD	
<p>MEDIA POV</p> <ul style="list-style-type: none">→ Does not align with the U.S. brand strategy, messaging strategy or national media strategy.→ Media Valuation: \$5,696→ Investment Total: \$725,000	<p>COMMUNITY POV</p> <ul style="list-style-type: none">→ TBD	

5

Presentation, Discussion and/or Action on Approval to
Solicit a Consultant Related to the
Hawai'i Smart Destination Initiative



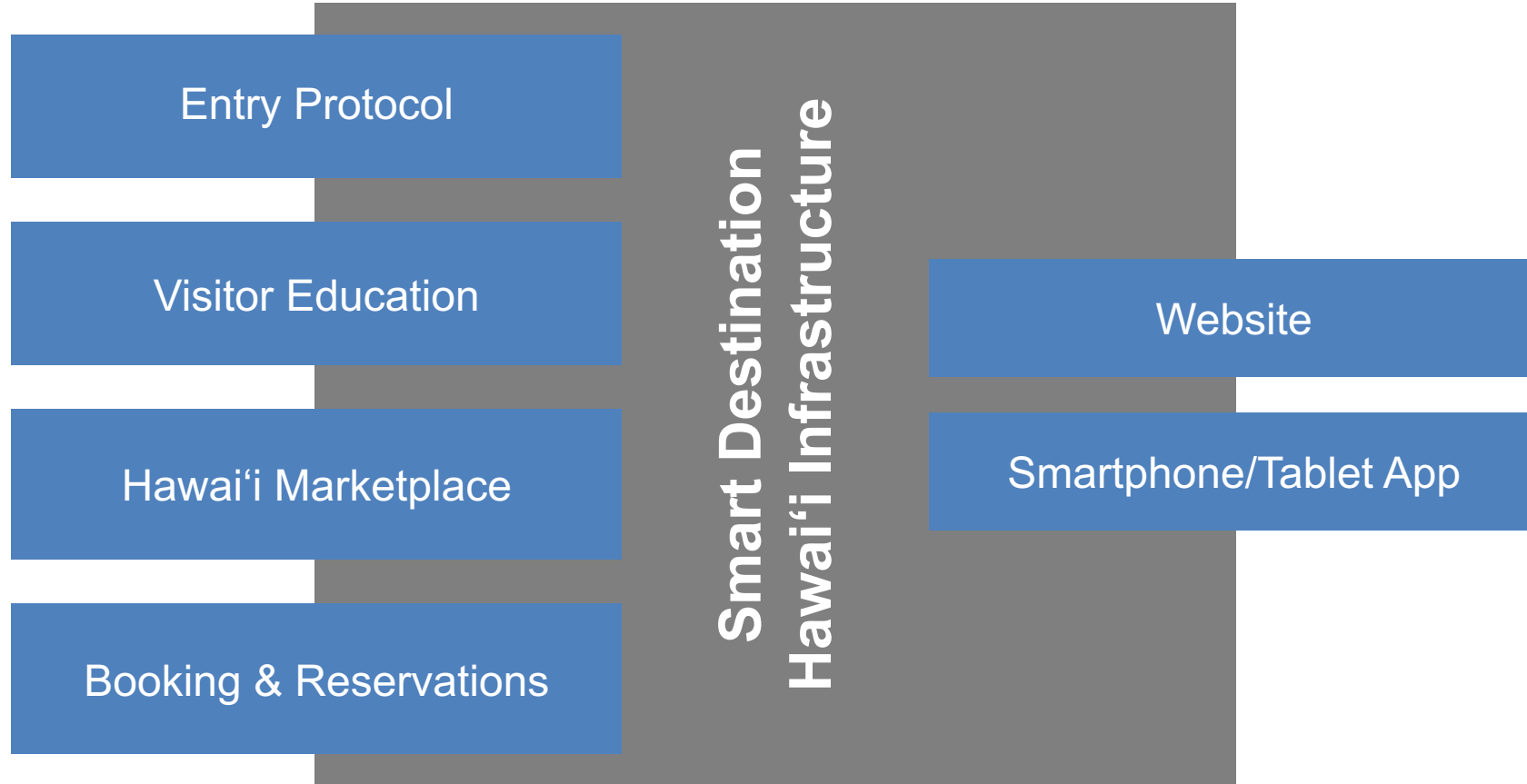
**SMART DESTINATION
HAWAII CONSULTING**



SUMMARY

We are seeking strategic consulting services to conduct a landscape analysis and help us articulate our vision for the Smart Destination Hawai'i digital infrastructure. The consultant will also help us develop the RFP to build the system.

Smart Destination Hawai'i will unify travel-related interactions with government and local businesses in a cohesive interface for visitors and kama'āina.



SMART DESTINATION HAWAII

AN ENGINE FOR REGENERATIVE TOURISM

ENTRY PROTOCOL

- ❖ Health requirements
- ❖ Biosecurity education and declaration

VISITOR EDUCATION

- ❖ Safety & security
- ❖ Trip planning & inspiration
- ❖ Cultural & community content

HAWAII MARKETPLACE

- ❖ Marketplace for locally-made products
- ❖ Global platform for micro & small businesses
- ❖ Builds upon Hawaii's strong brand

BOOKING & RESERVATIONS

- ❖ Reservations for parks, trails, and other identified hotspots
- ❖ Improve relationship with visitors through first-party data and communications
- ❖ Partner with industry to reduce economic leakage, keep visitor spending in Hawaii

APPROACH

1

Discovery

- ❖ Define scope and specific requirements based on existing system(s)
- ❖ Conduct stakeholder outreach

2

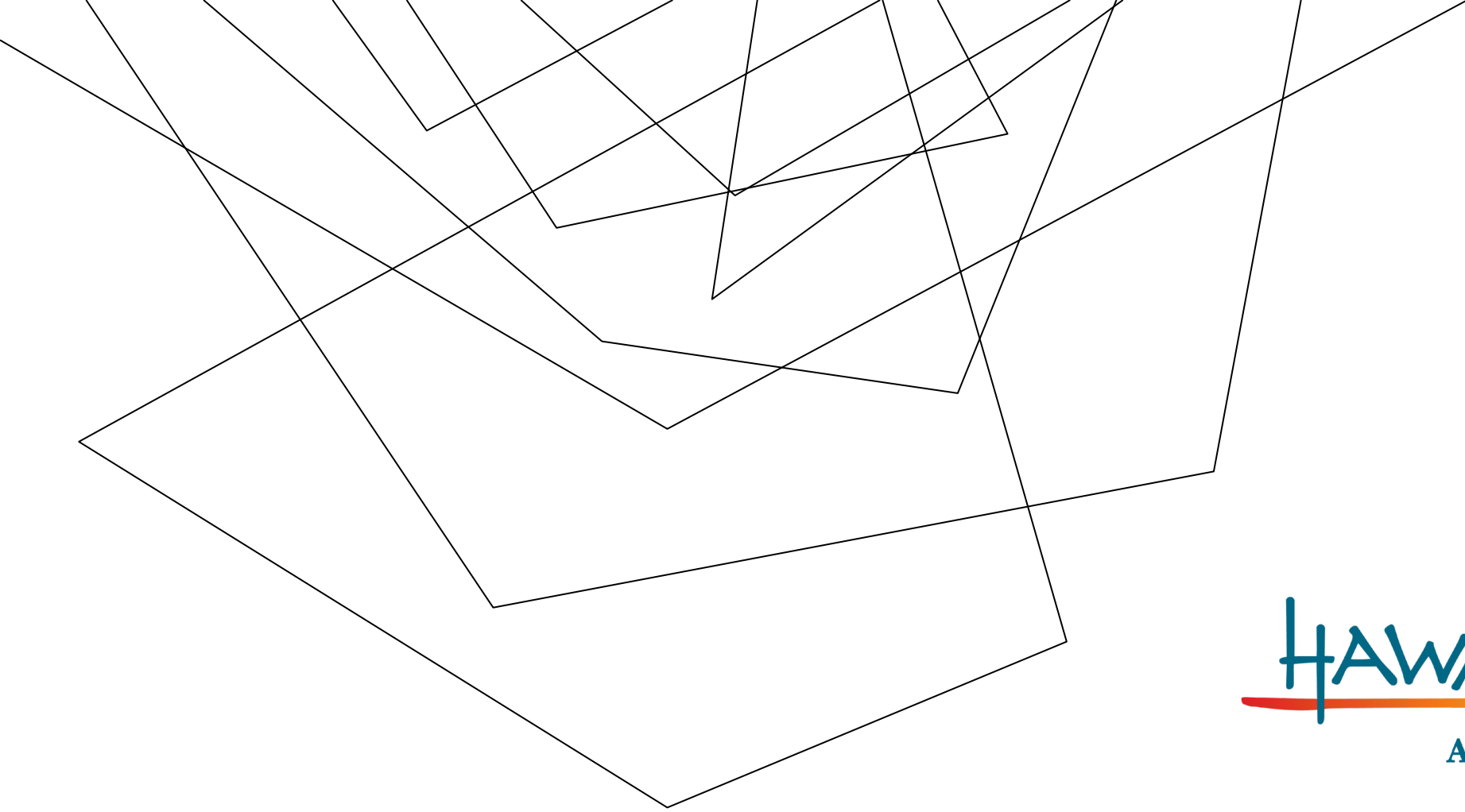
Design

- ❖ Map out Smart Destination Hawai'i: its platform, features, timeline and KPIs

3

Procurement

- ❖ Incorporate discoveries from step 1 and draft into RFP guidelines and requirements.
- ❖ Vendor Presentations
- ❖ Evaluation process and decide on best contractor
- ❖ negotiate, finalize and sign contract



MAHALO

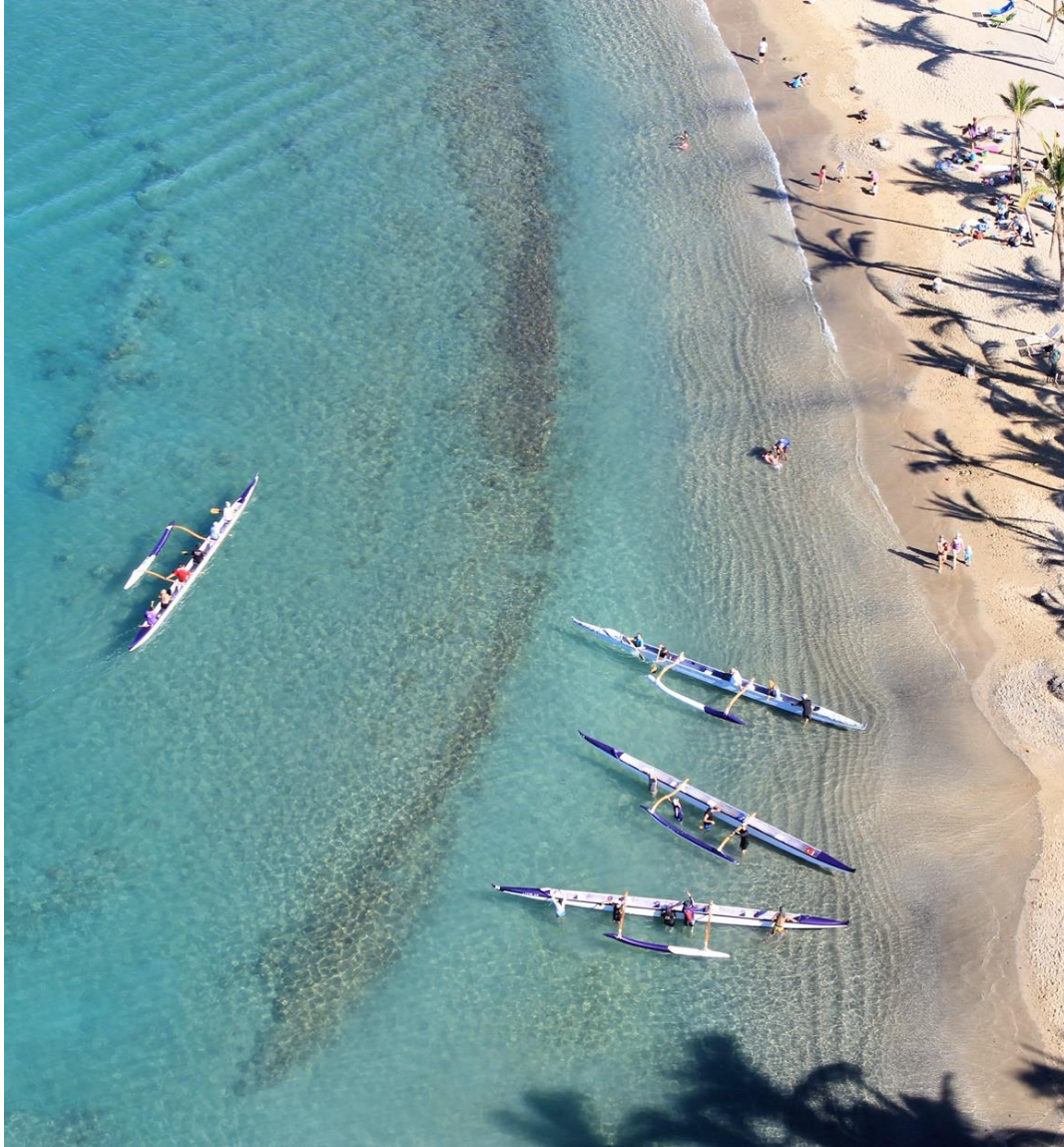
6

Presentation, Discussion and/or Action on
HTUSA's Brand Marketing and Management Plan for
January to June 2022***



**Hawai'i Tourism United States
January – June 2022 BMMP**





Agenda

Hawai'i Tourism United States January – June 2022 BMMP

- I. Market Analysis
- II. Target Audience
- III. Destination Management & Regenerative Tourism
- IV. Major Campaigns
- V. Public Relations
- VI. Travel Trade
- VII. PGATOUR
- VIII. Budget

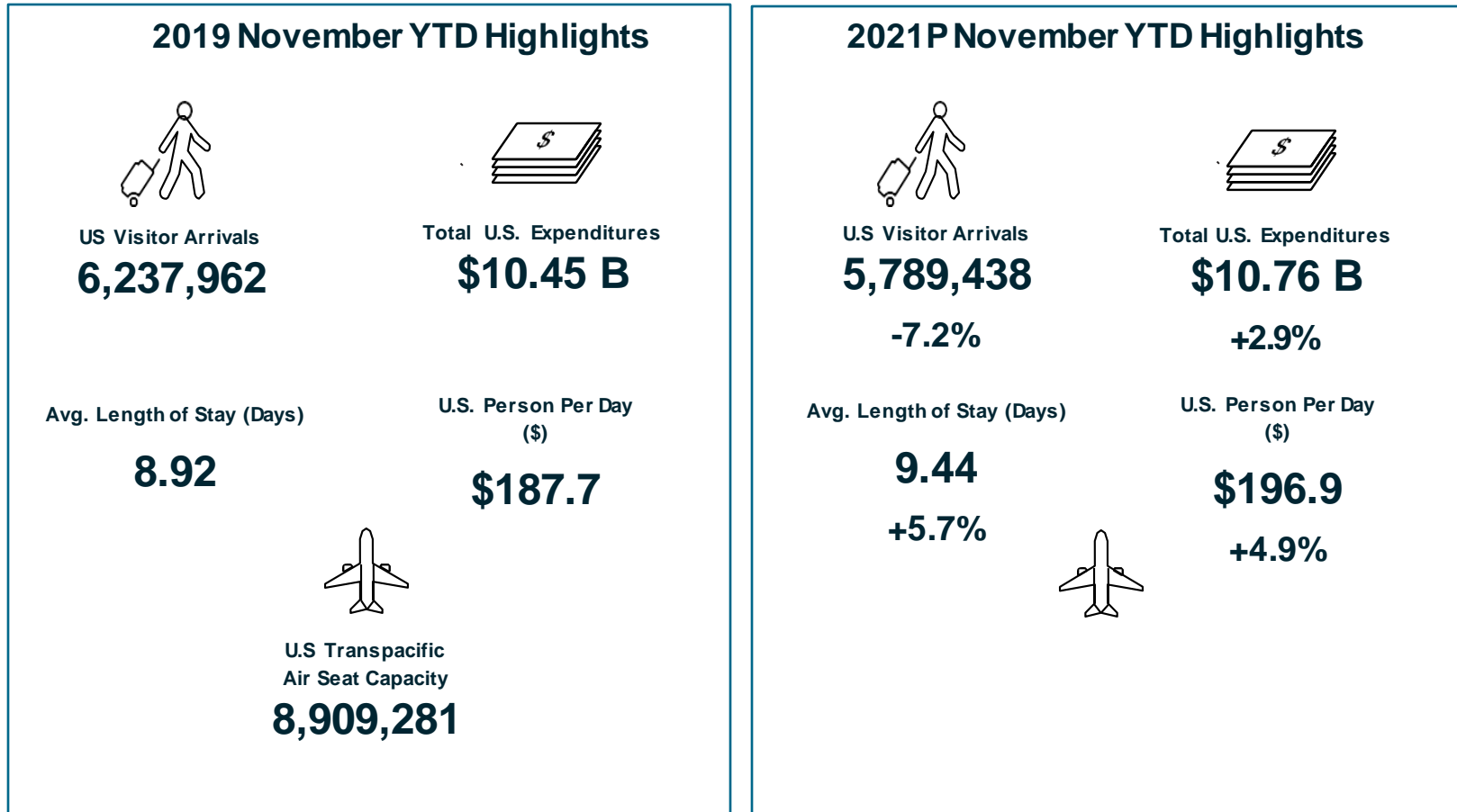


Market Analysis

The
HAWAIIAN
ISLANDS

MARKET PERFORMANCE

In 2019, U.S. air arrivals represented 67% of Total Arrivals and 66% of Total Expenditures of Hawai‘i

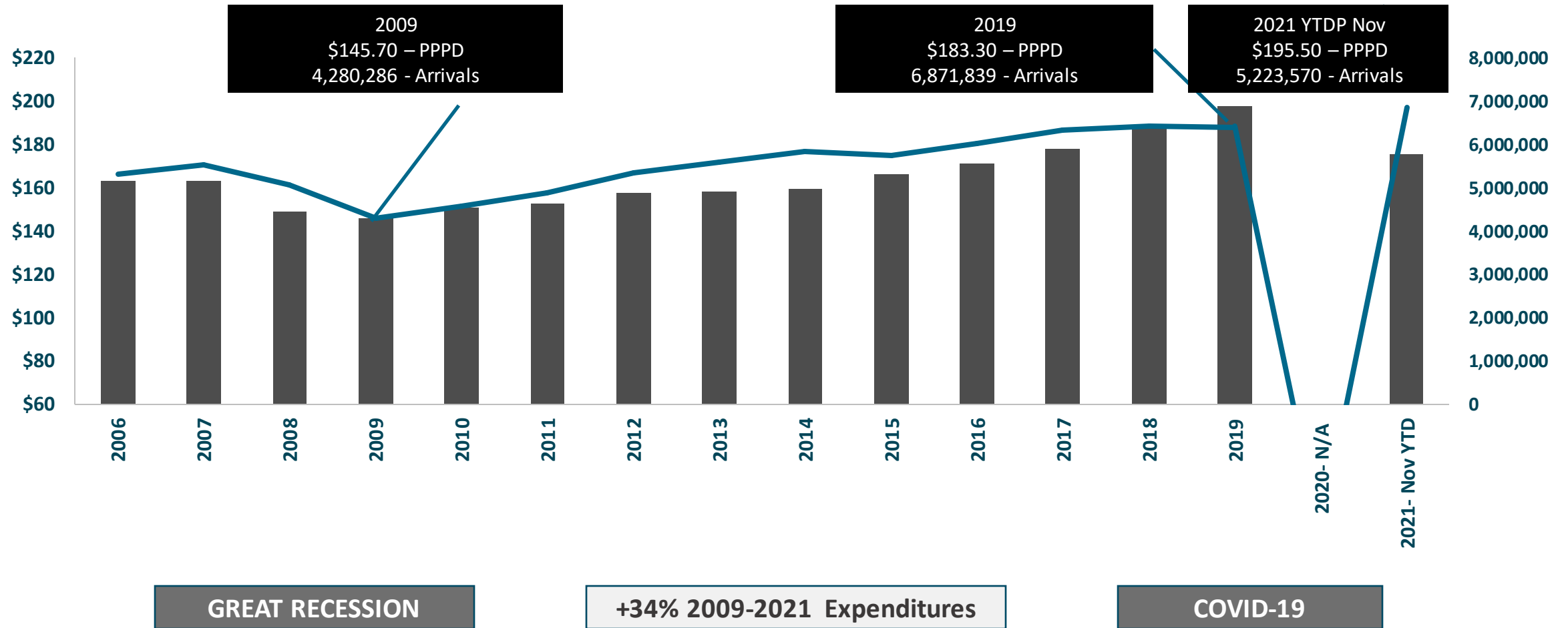


Targeting

- HTUSA has been targeting the Avid Traveler (a visitor who has the propensity to spend a higher level) for many years.
- The US MMA traveler PPPD spending has evolved upward over these years, and that increase in PPPD has continued in 2021.

MARKET ANALYSIS

U.S. Tourism Recovery- Arrivals/\$PPPD



MARKET CONDITIONS

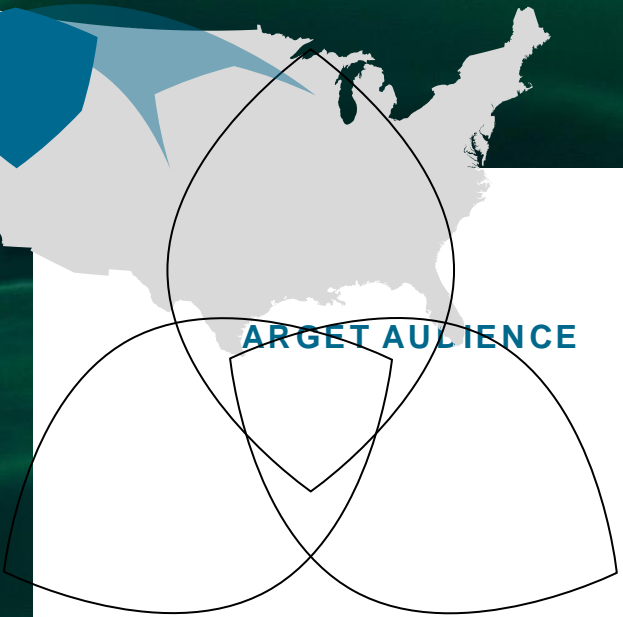
The 2022 outlook for U.S. travel to Hawai'i continues to be mixed.

- The economy is expected to grow at a more moderate pace in 2022. Overall, activity should remain strong as upbeat household consumption and fiscal stimulus support domestic demand.
- It is expected that inflation will peak in early 2022, as cooler demand, a shifting spending mix and a replenished supply will lead to a better balance between supply and demand by mid-year.
- Overall U.S. domestic leisure travel spending is estimated to reach 92 percent of 2019 levels by the second quarter of 2022. The latest forecast from the U.S. Travel Association projects that it will be 99 percent recovered (relative to 2019 levels) in 2022 and 102 percent in 2023.
- The DBEDT Quarterly Tourism Forecast (as of January 2022) estimates the U.S. market will contribute \$13.60 billion in total expenditures, 7.68 million arrivals comprising of 70.07 million visitor days.
- The emergence of the Omicron variant coupled with the addition of a planned COVID vaccine booster to the Hawai'i Safe Travels exemption protocol portends a reduction of U.S. arrivals for at least the first two months of 2022 and possibly further out. Conversely, Hawai'i could benefit from domestic visitation due to reinstated global restrictions.

A scenic view of a waterfall in a lush forest, framed by large green leaves in the foreground. The waterfall is the central focus, cascading down a rocky ledge into a small pool. The surrounding forest is dense and vibrant green. The foreground is dominated by large, out-of-focus green leaves, creating a sense of depth and immersion.

Target Audience

The
HAWAIIAN
ISLANDS



- **Mindful Hawai'i Target Traveler**
 - **Pre-destination decision**
 - **Post-destination decision**
- **Hawai'i Residents**

DEMOGRAPHICS

*Age, Income,
Location, High
Travel Spend*

**DESIRED TRAVEL
EXPERIENCE**

*Culture, Escape,
Adventure,
Cuisine*

**PERSONALITY
TRAITS & VALUES**

*Agreeable,
Polite, Mindful,
Respectful*

Mindful Hawai'i Target Traveler

PRE-DESTINATION DECISION

Messaging

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

Media Channels

- Facebook/IG
- Gohawaii.com
- Pinterest
- Advanced TV
- YouTube
- Digital Media

Targeting Signals/Data Types

- Desired Travel Experience
- Social & Search Activity
- Demographics
- Personality Traits & Values
- Past Visitation

Tactics

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

POST-DECISION/BOOKING

Messaging

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

Media Channels

- Facebook/IG
- Digital Media
- Pinterest
- Enewsletters
- YouTube
- Gohawaii.com
- Gohawaii App

Targeting Signals/Data Types

- Credit Card Transactions
- Airline, Lodging & Transportation Bookings

Tactics

- Paid and Organic Social Series:
 - Hawai'i is Our Home
 - Contextualizing Stories
- Airport Takeovers

EN ROUTE/ON-ISLAND

Messaging

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

Media Channels

- Facebook/IG
- OOH
- Digital Media
- Gohawaii.com
- In-Room
- Gohawaii App
- In-Flight

Targeting Signals/Data Types

- Current Location vs. Usual Location (Pinpoint Visitors)

Tactics

- Airport placements
- Waze Ads
- Buy Local Through Social

Residents of Hawai'i

RESIDENTS

Messaging

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

Media Channels

- Facebook/IG
- OOH
- Digital Media
- Gohawaii App
- Gohawaii.com
- Island Specific Media

Targeting Signals/Data Types

- Current Residence
- Receptivity to Tourism economy

Tactics

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



Destination Management & Regenerative Tourism

The
HAWAIIAN
ISLANDS

OUR VISION

Marketing, aligned with destination management and economic development, plays a more important role than ever before in helping shape a bright future for our residents, the tourism industry of Hawai'i and our visitors.

THE OBJECTIVE

Have marketing play a catalytic role in evolving tourism in Hawai'i so it has a positive impact for our communities, on the natural environment, and with the traveler.

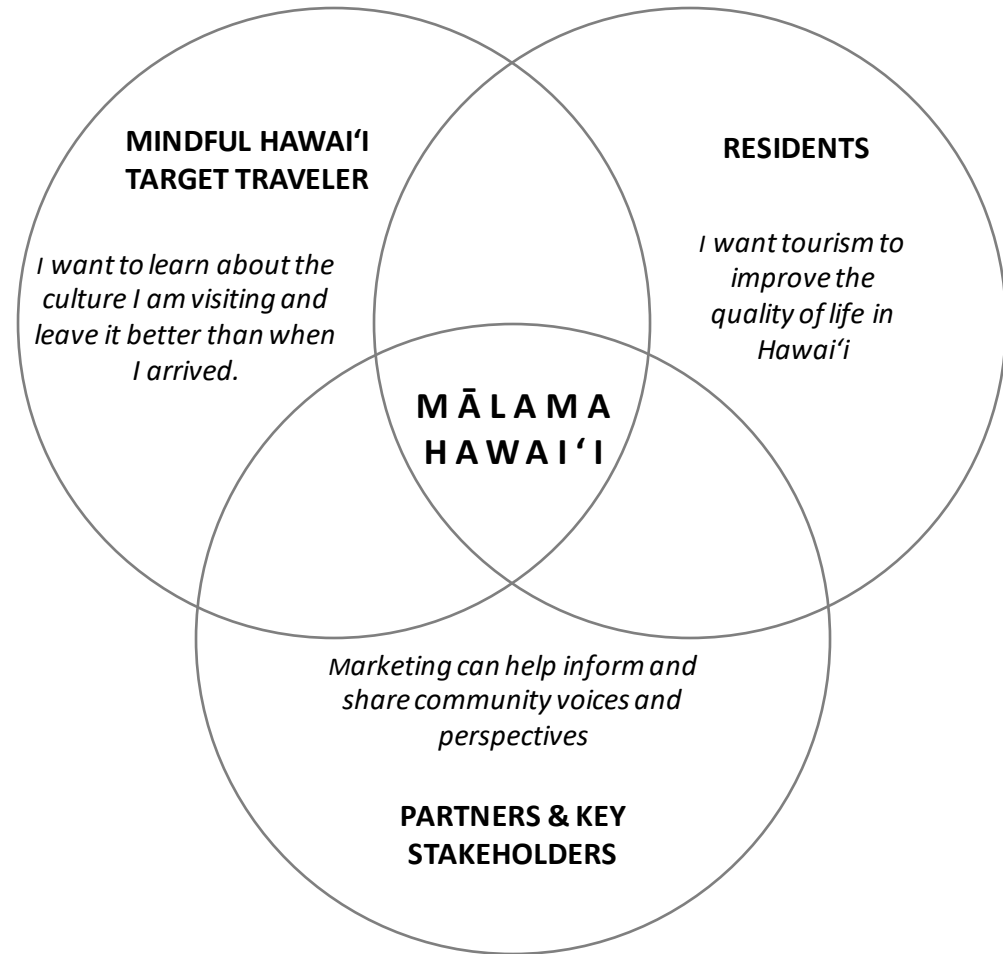
BRANDING / MARKETING STRATEGY

**It's time to flip the tourism equation
from residents as the denominator
to residents as the numerator**

BRANDING / MARKETING STRATEGY

To achieve this, we must come together with a shared *kuleana* and a singular message strategy that is more important now than ever before:

Mālama Hawai'i



A NEW ERA OF REGENERATIVE TOURISM MARKETING AND MANAGEMENT FOR HAWAI'I





Major Campaigns

The
HAWAIIAN
ISLANDS



Reactions to Mālama Hawai'i Videos

BRANDING AND MARKETING - PRE-DESTINATION DECISION

Shape visitor perception and rebuild trust with residents.

—

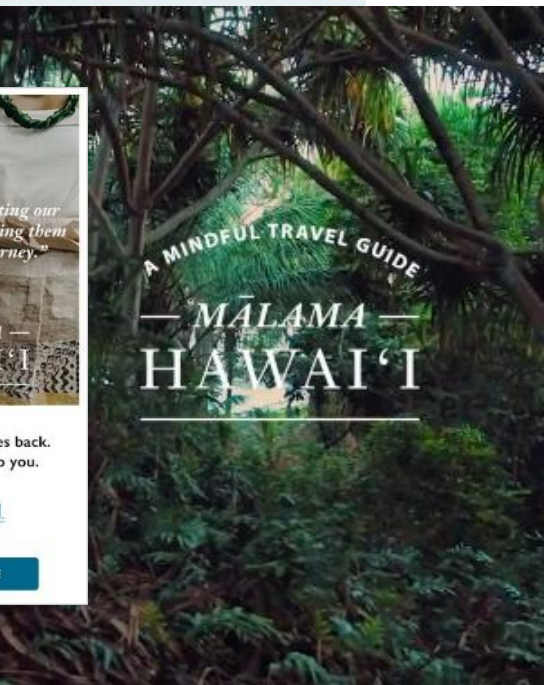
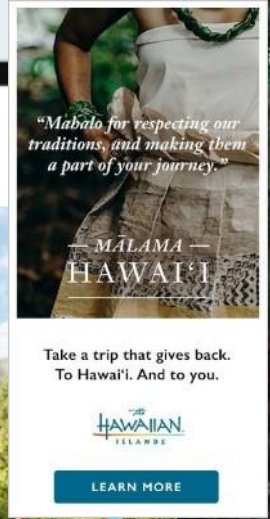
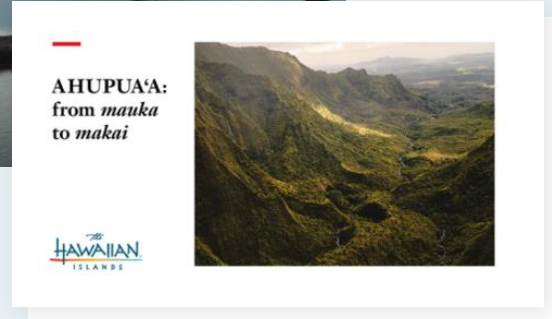
AUDIENCE

MINDFUL HAWAII TARGET TRAVELERS
HAWAII RESIDENTS

DIGITAL + SOCIAL

Mālama Hawai‘i

The changing landscape of tourism created an opportunity to rethink the role of tourism in Hawai‘i. The target audience was analyzed to identify and message the more mindful traveler – those who were likely to follow community values and were ready to give back. Based on years of research on Hawai‘i’s target audience, HTUSA has gained an understanding of how to engage viewers. Using a wide, beautiful and natural setting as the opening shot of content engages viewers, and then we allowed volunteer organizations to share their stories of Mālama Hawai‘i. Video content was created to highlight people in the community who are working to regenerate their Island home, and invited visitors to support their causes, with the desire to have residents and visitors working together shoulder to shoulder.



SOCIAL + DIGITAL

Hero Content: Hawai'i is Our Home

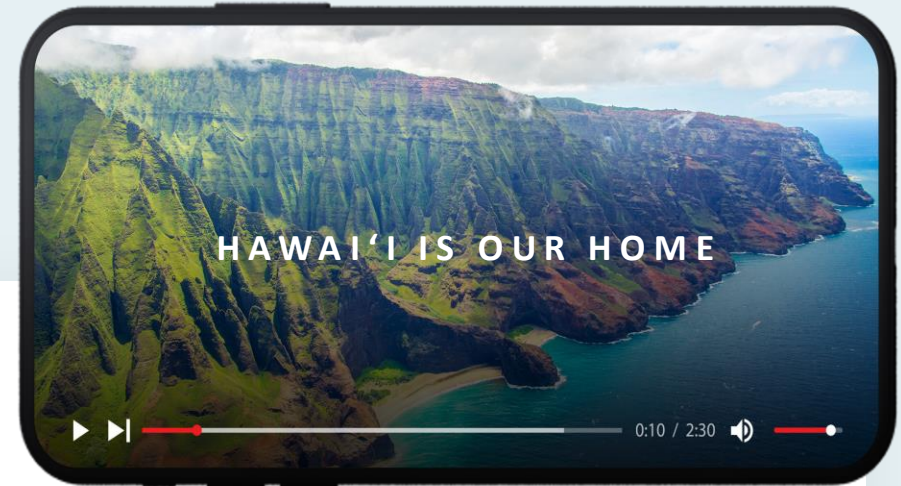
A new story is needed for visitors. One that helps them better understand the place they are visiting, and their role in shaping its future.

A new anthem video for the islands – Hawai'i is Our Home – will visualize the impact of visitors – good and bad – on Hawai'i's future. Good behavior will be encouraged while also clearly explaining the negative behaviors that are off-limits, e.g. touching wildlife and venturing onto private land or sacred sites – with specific content gleaned from DMAP sub-action items.

This new video will be launched and distributed similarly to the highly successful and impactful *Share Aloha*, with marquee paid placements, organic social, and a short paid series.

ASSETS:

1 hero video; 9:16 Reels, Facebook; 16:9 YouTube
2 Paid ad videos



Script

There is no place like Hawai'i.

Home to unimaginable beauty from *mauka* [from the mountains] to *makai* [to the sea], the land, waters, and living things that inhabit Hawai'i are found nowhere else in the world.

Hawai'i is also home to our *'ohana* [family] of residents. People who have stewarded the islands for generations – united by a deep *kuleana* [privilege, responsibility] to *mālama 'āina* [care for the land].

This *kuleana* to preserve and protect Hawai'i, is at the heart of our culture. And as guests in our home, we ask that you share that *kuleana* during your stay.

This means coming to Hawai'i with an open heart and open mind.

Getting to know our stories, before posting yours.

It means admiring marine life from a distance, treading carefully on clearly marked trails, and respecting our sacred sites – so that our home and our stories will live on for future generations.

It means that when you visit Hawai'i you share *aloha*, before expecting it. When you experience what it means to care for our islands, your visit will be even more meaningful.

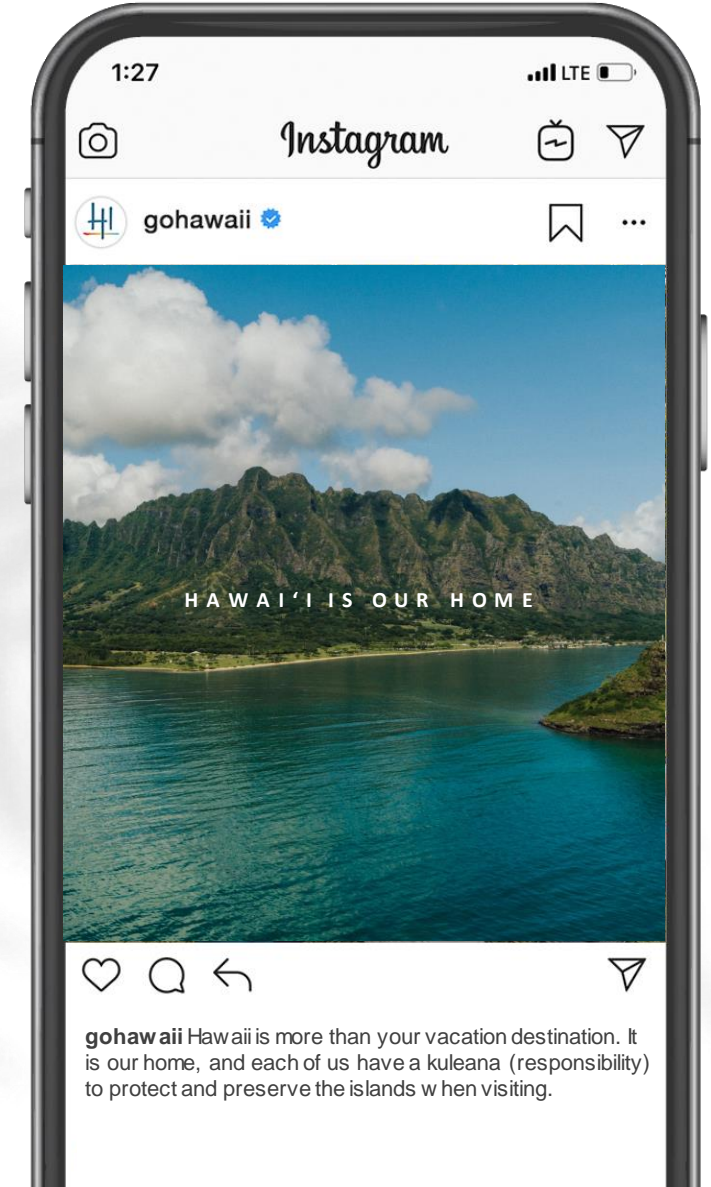
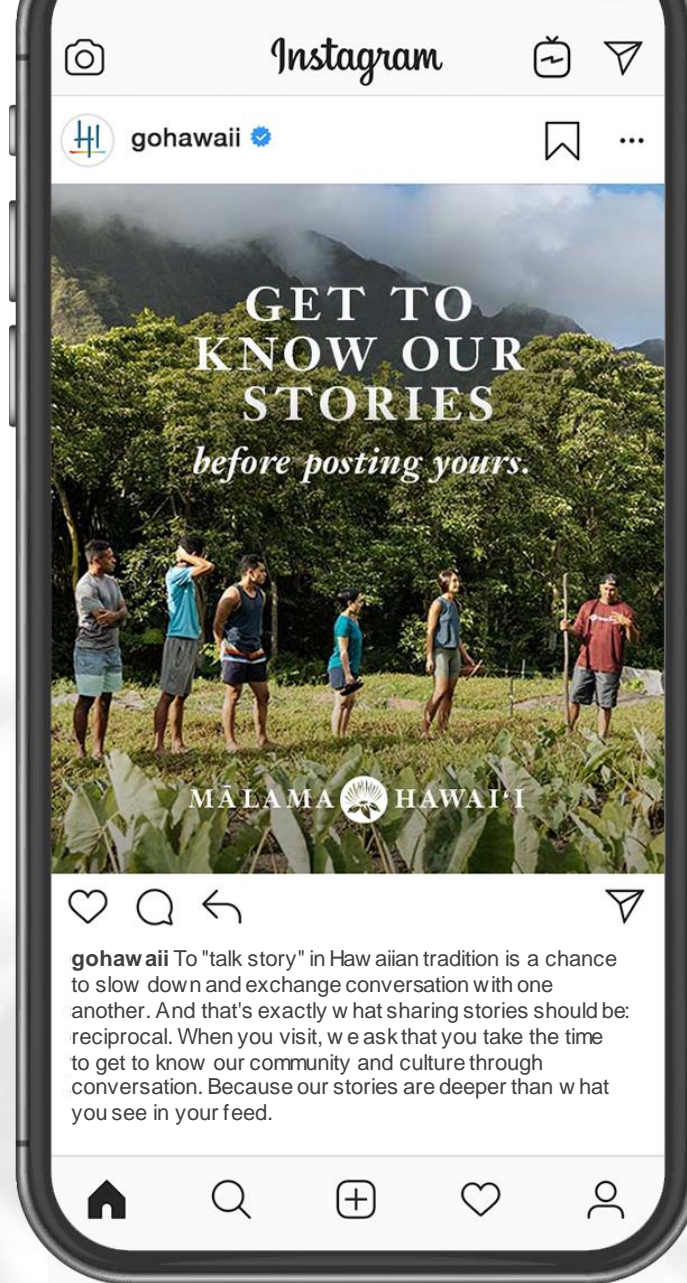
Mahalo for joining us in our *kuleana* to *mālama* Hawai'i.

Learn how you can Mālama Hawai'i during your stay at malamahawaii.com.

DIGITAL + SOCIAL

Contextualizing our Stories on Social

A suite of organic and paid contextually relevant assets will distribute key messaging across platforms to continue intercepting audiences where they are seeking travel and tourism inspiration prior to booking, and also in the post-booking but pre-arrival window when visitors would have heightened receptivity.



BRANDING AND MARKETING: POST-DESTINATION DECISION

Shape pre-arrival intent and on- island behavior.

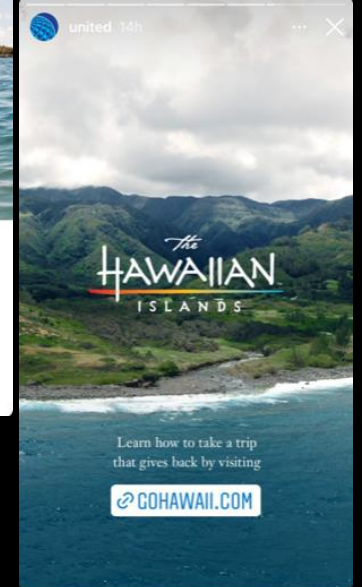
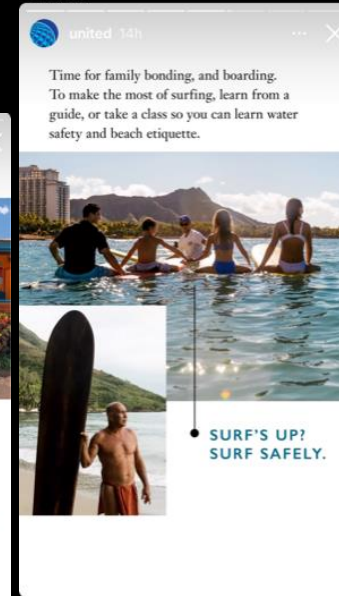
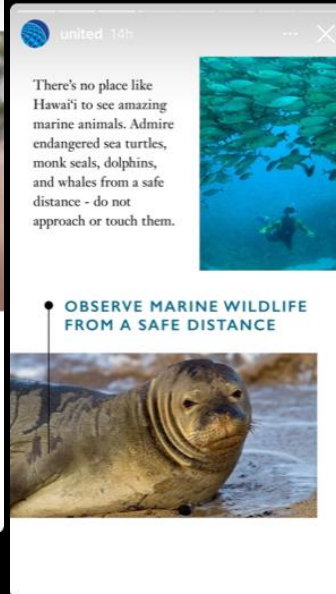
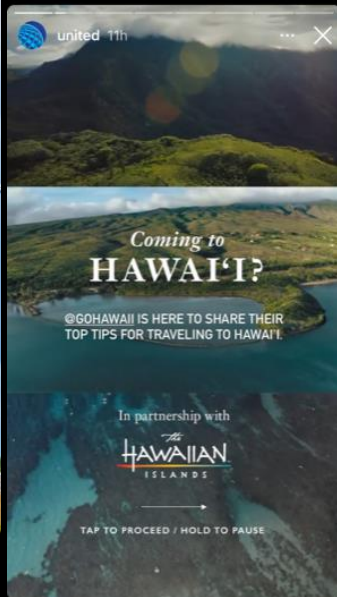
—

AUDIENCE

MINDFUL HAWAII TARGET TRAVELERS
HAWAII RESIDENTS

UNITED AIRLINES

Instagram Takeover



ALASKA AIRLINES

Confirmation Email

Alaska Hi, Daniel
MVP Gold level 184

ⓘ Special travel instructions apply at multiple airports in your itinerary. Please visit alaskaair.com/advisory for more information.

ⓘ Special travel instructions apply at multiple airports in your itinerary. Please visit alaskaair.com/advisory for more information.


Masks required—even when vaccinated.

- Federal law requires all guests 2 years and older wear a mask over their nose and mouth at all times for the duration of travel.
- Refusing to wear a mask or comply with crew instructions may result in denial of boarding, removal from the aircraft, and/or penalties under federal law.
- [Learn more](#) about mask requirements.

**Your trip,
from takeoff
to touch down.**

Alaska 817 Seat 17D

Confirmation code:
ABNSZW

9:50 AM **LAX**  2:00 PM **HNL**
Los Angeles Honolulu

Departure **01/02/2022** Arrival **01/02/2022**

[See trip details.](#)

Be a mindful traveler.

As we welcome guests to Hawaii, we're making sure that *mālama*—"to care for" in Hawaiian—is top of mind. As part of our commitment to keep the Aloha State healthy and vibrant, we've partnered with travel2change to inspire guests to leave the Islands better than when they arrived.

[LEARN MORE](#)

Alaska AIRLINES + **travel2change**

LEAVE A POSITIVE IMPACT - JOIN A TRAVEL2CHANGE ACTIVITY TODAY OR DONATE NOW.

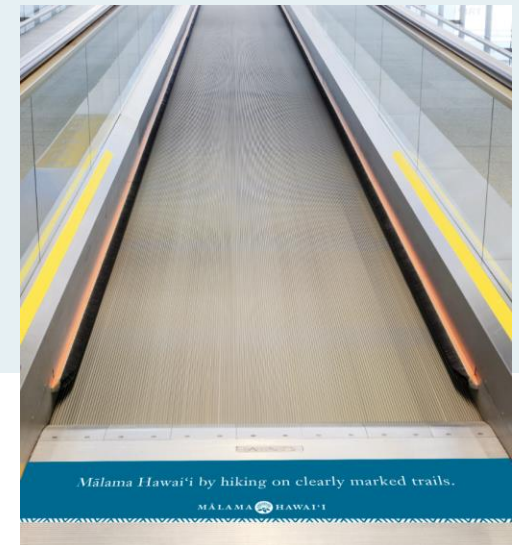
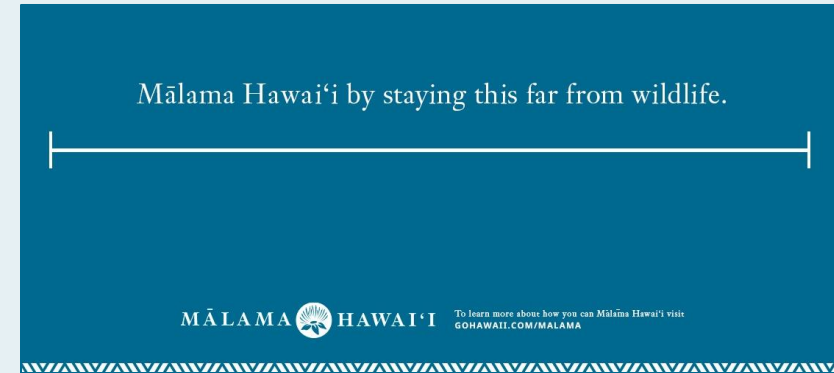
[Book Now](#)

PAID MEDIA

Airport Takeovers

Through marquee airport real estate takeovers, both in Hawai'i and the continental U.S., visitors who travel to and from the Hawaiian Islands will be intercepted with impactful creative that is impossible to ignore.

These placements will deliver clever and compelling messaging to educate visitors on how to *mālama* Hawai'i, e.g. respecting wildlife and staying on clearly marked trails.

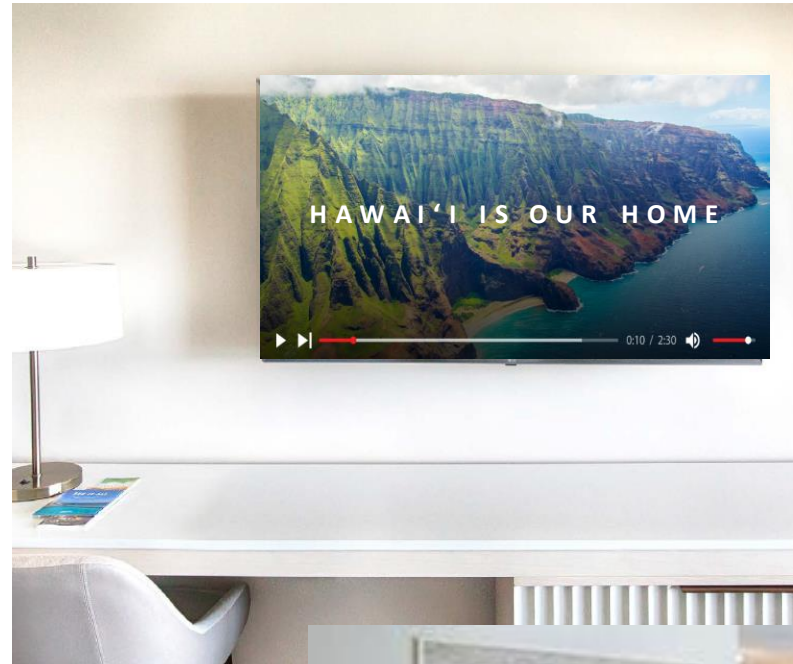


PAID MEDIA

In-Room Video

Channels: Real Hawaii TV (Oahu), Hoku TV (Oahu, Maui, Hawaii Island, Kauai), Outrigger TV (Oahu, Hawaii Island), Elevate TV (Oahu), Living TV (Oahu)

60-second video



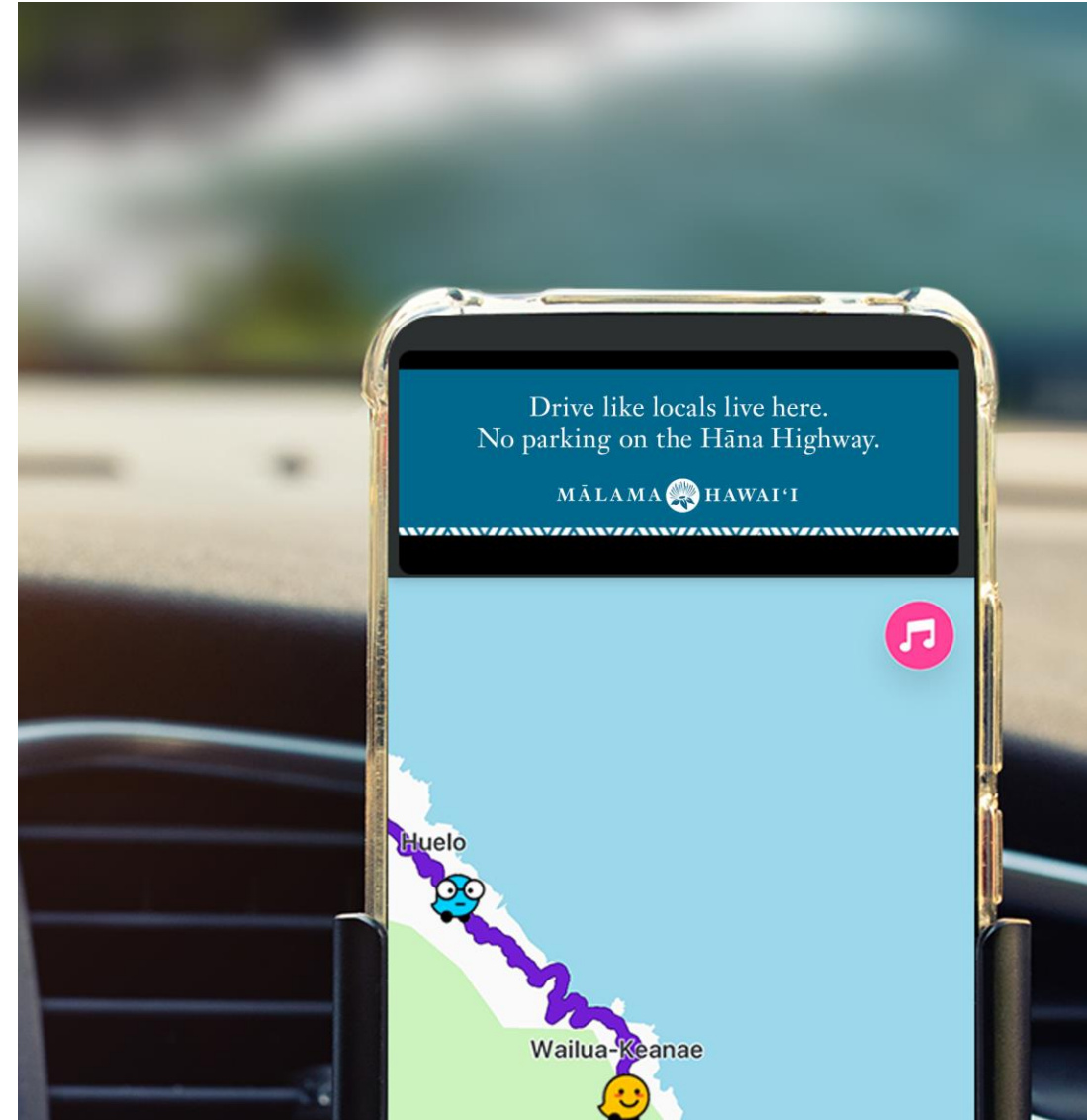
PAID MEDIA

Target On-Island Arrivals

Every visitor is using mobile apps, e.g. Waze, to navigate their way around each island, which makes those apps an impactful tool to geotarget audiences with the exact Mālama Hawai'i messages they need to hear, right where they are and directly on their mobile device. Sites and desired conditions will be identified by the DMAPs.

Executions could include:

- **Hāna Highway:** Drive like locals live here. No parking on the Hāna highway.
- **Beaches:** Mālama Hawai'i by staying 100 yards from sea turtles and other wildlife.
- **Trails:** Mālama Hawai'i by hiking on clearly marked trails.



BRANDING AND MARKETING: POST-DESTINATION DECISION

Implement regenerative tourism efforts for all incoming travelers.

—

AUDIENCE

MINDFUL HAWAII TARGET TRAVELERS
HAWAII RESIDENTS

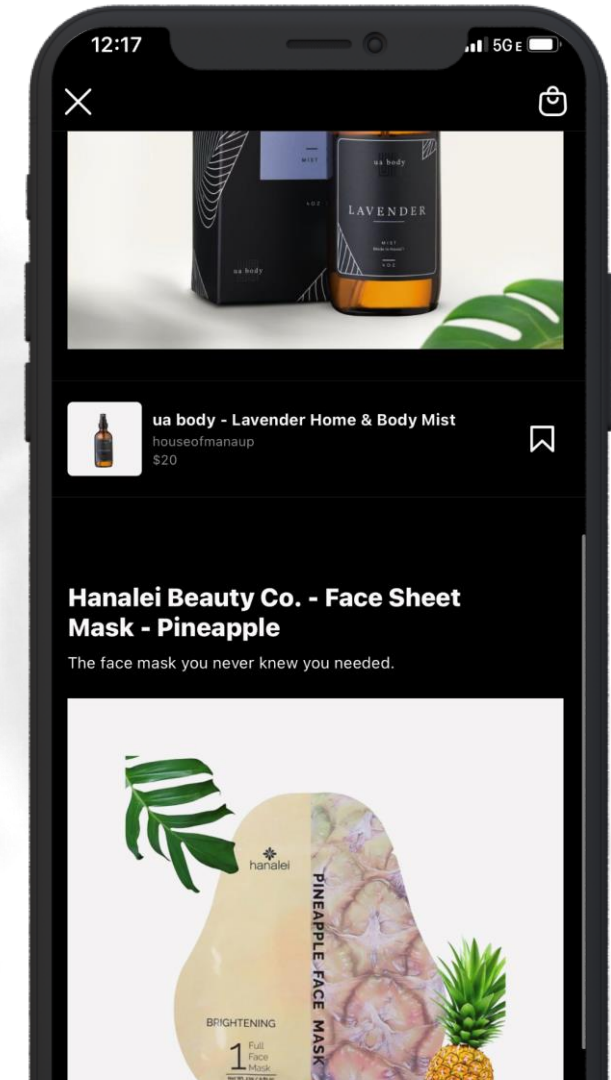
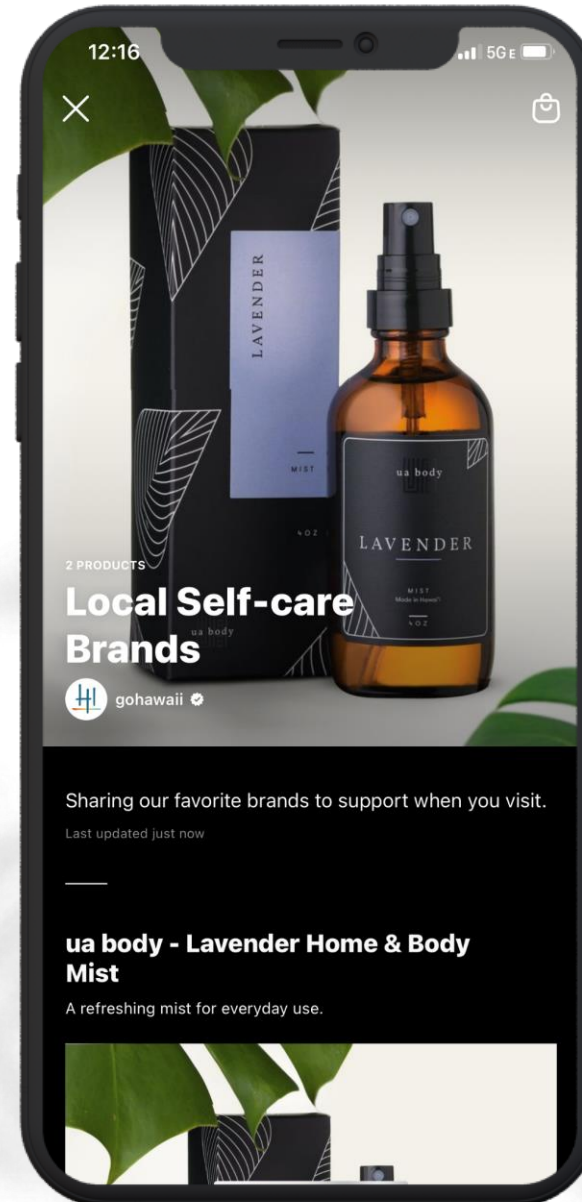
RESIDENT + COMMUNITY SPOTLIGHT

Buy Local Through Social

To directly and tangibly support local businesses and promote Hawai'i made products, we will curate Instagram Guides and Pinterest Board content for local Hawai'i artisans and products, driving to their online shops or where to buy in store. Local influencers will also be engaged to share their favorite local brands via Instagram Story stickers and Instagram Live.

Editorialized social story formats will feature the unique stories of business owners and makers, and their deep connection to their community and Hawaiian culture. Influential tastemakers can share out their favorite local brands, with stickers and links to purchase.

Additionally, HTUSA will further support the success of local businesses by hosting free workshops for all business partners on social media best practices and social e-commerce opportunities.



Concepts and suggested brands and ambassadors are strictly for illustrative purposes.

BRANDING AND MARKETING: HAWAII RESIDENTS

Communicate how DMAP initiatives benefit Hawai'i Residents.

—

AUDIENCE

HAWAII RESIDENTS

DMAP PROCESS



DMAP Story Example

Surfrider Foundation: Rise Above Plastic on Vacation



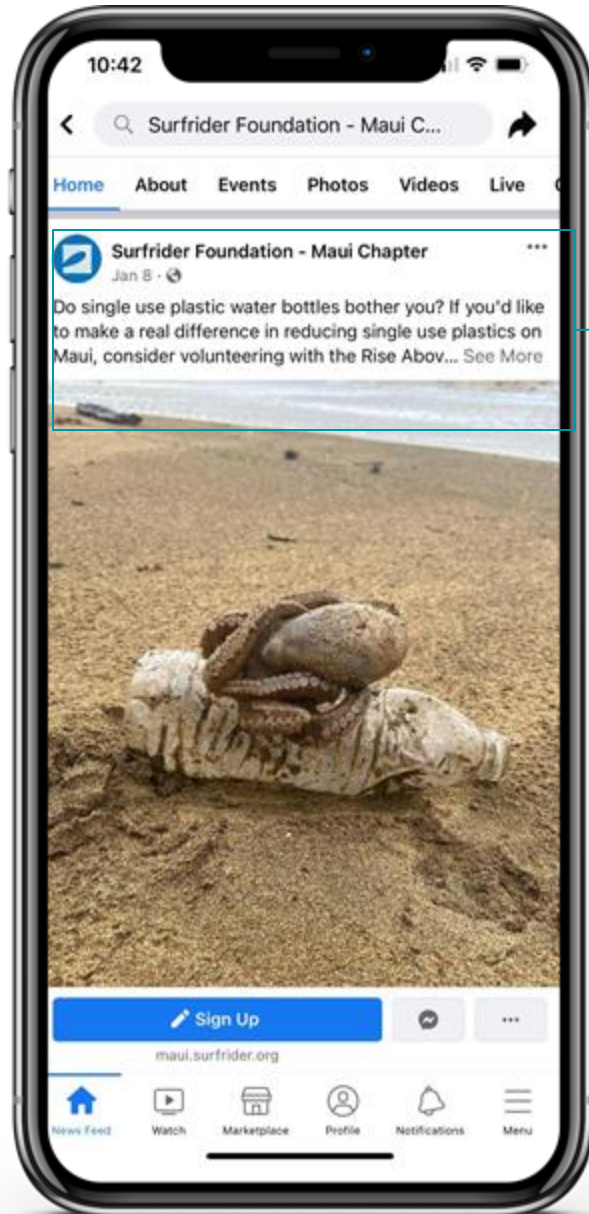
Marina Scott

VICE CHAIR & RISE ABOVE PLASTICS

Marina is self diagnosed with single-use plastic anxiety and passionate about reducing our impact on the environment. Zero waste efforts and community collaboration are her jam. Less talk, more action!

DMAP Action B.4 Initiate, fund and continue programs to protect the health of ocean, fresh water and land-based ecosystems and biosecurity. Encourage and if needed provide incentives to visitor industry partners for recycling, wastewater reuse, organic land care, and renewable energy installation. Recognize those partners who have exceeded expectations.

Concepts and suggested brands and ambassadors are strictly for illustrative purposes.



Organization

Organic Posts (Video or Still Images)

“Do single use plastic water bottles bother you? If you’d like to make a real difference in reducing single use plastics on Maui, consider volunteering with the Rise Above Plastics program.”

Paid Social

Stories & In-Feed Posts

“Now more than ever, we need to encourage responsible tourism to protect our fragile environment. The goal of this campaign is to reach visitors before they land on Maui. They need to know that our water is safe to drink and reusable bottles are provided by their vacation rental. We aim to make this as easy as possible for vacation rental owners.”

-Marina Scott, Rise Above Plastics Coordinator, Surfrider Foundation Maui Chapter

The Surfrider Foundation, in partnership with the Hawaii Tourism Authority and the Destination Management Action Plans, recently launched Rise Above Plastics. Swipe up to learn more about this project and others like it.

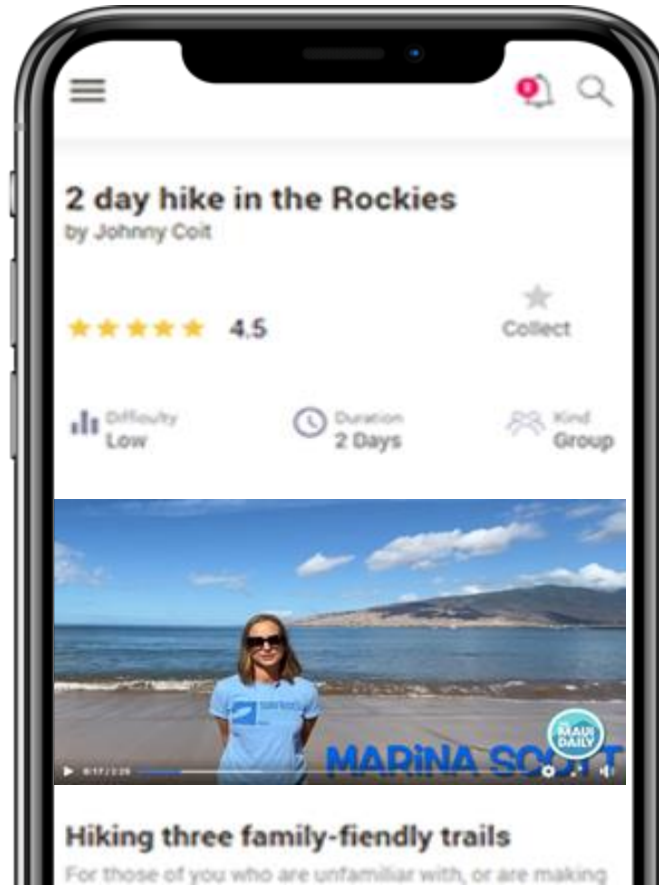
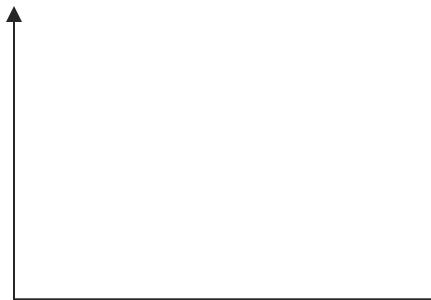


Spaceback Units

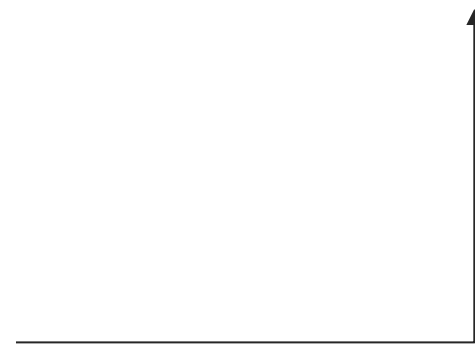
Programmatic ads in a familiar, social media format with authentic, lo-fi production values.

Marina Scott of the Maui Surfrider Foundation speaking on the [Rise Above Plastics Program](#).

Informative content to connect people to the core of what DMAPs are in their communities.



Utilizing video & social content from DMAP partners.



Concepts and suggested brands and ambassadors are strictly for illustrative purposes.

YouTube

Pre-roll Ads



Concepts and suggested brands and ambassadors are strictly for illustrative purposes.

Sponsored Content (Native)

- Home Page, next to Top Story
- Web, Mobile and App
- Always above the fold – 3rd story
- Sold on a daily basis, 1 advertiser only
- Clicks to Story page which can include video (inclusive of long-form video)



Local Community Media

Consideration List

Island of Hawai'i Media		O'ahu Media	Kaua'i Media
West Hawaii Today		Honolulu Star-Advertiser	The Garden Island
Hawaii Tribune Herald		LULU Magazine	Midweek Kauai
Big Island Now	Maui Nui Media	Week	Kauai Now News
Kohala Mountain News	The Maui News	Honolulu Civil Beat	For Kaua'i Online / Magazine
Ka'u Calendar	Maui Now / Pacific Media Group	Honolulu Public Radio	KauaiForward.com
Ke Ola Magazine	Maui Now	Honolulu Magazine	Hō'iike Community Television
Big Island Videos News	KAOI 1110AM	Honolulu Business News	KVIC-TV Channel 3 / Kauai 101
Hāmākua Times	Maui Times	Honolulu Business News	Royal Coconut Coast Association
Hawaii Tracker	Akaku Maui Community Media	Honolulu Magazine	Kauai Festivals & Events
Big Island Gazette	Hawaii News Now	Honolulu Concierge	This Week Hawaii - Kaua'i
Big Island Thieves Media	Media Influencer	Honolulu House Hawaii	Kauai Chamber of Commerce
Big Island Television	Maui Time Weekly	Honolulu Side Stories	All the Rotary Clubs
KBIGFM 97.9FM Hilo / 106.1FM K	The Moloka'i Dispatch	Honolulu o Hawai'i	Two Zonta Clubs
KAPA Hawaiian FM	Lāna'i Today	Honolulu Times Hawaii	Lihue Business Association
The Beat Hawaii	Community Council of Maui	Honolulu 90.1 FM	Rice Street Business Association
	Kihei Community Association	Honolulu Island 98.5 FM	of Commerce
	Maui Information Guide	Honolulu Hawaiian 105 105.1 FM	Filipino Chamber of Commerce
		Honolulu Da paina 93.1 FM	Board
		Honolulu Krater 96.3 FM	Kauai Board of Realtors
		Honolulu KSSK 92.3 FM	Hanalei Initiative
		Honolulu STAR 101.9 FM	Association
		Honolulu POWER 104.3 FM	Kalaheo Business Association
		Honolulu KUMU 94.7 FM	Association
		Honolulu KREA 1540 AM	@Localgetaways_hi
		Honolulu KZOO 1210 AM	Kauai Live Laugh Love
		Honolulu KNDI 1270AM	The Garden Island - Facebook
		Honolulu KPHI 1130AM, 101.5FM	Kauai Community
		Honolulu KHCM 880 AM	Kauai Group!
			Kauai Life
			Kauai Visitors Channel
			Pacific Media Group
			H.Hawaii Media
			STAR FM 94.3
			KFMN FM 96.9

Public Relations

- Coordinated Statewide Effort
- Messaging Focus: Mālama Hawai'i, Kuleana, Destination Management
- PR Team: Immersed in DMAP priorities, conduit for newsworthy stories and key ambassadors
 - DMAP, Community Enrichment, Kūkulu Ola, Aloha 'Āina, Mālama Hawai'i Program
- National Earned: Engage and educate Hot 100 Media
- Local Earned: Share progress and DMAP success stories targeting hyper-local media

SFGATE

'We have to manage visitor impacts': More Hawaii tourist hotspots will soon require reservations

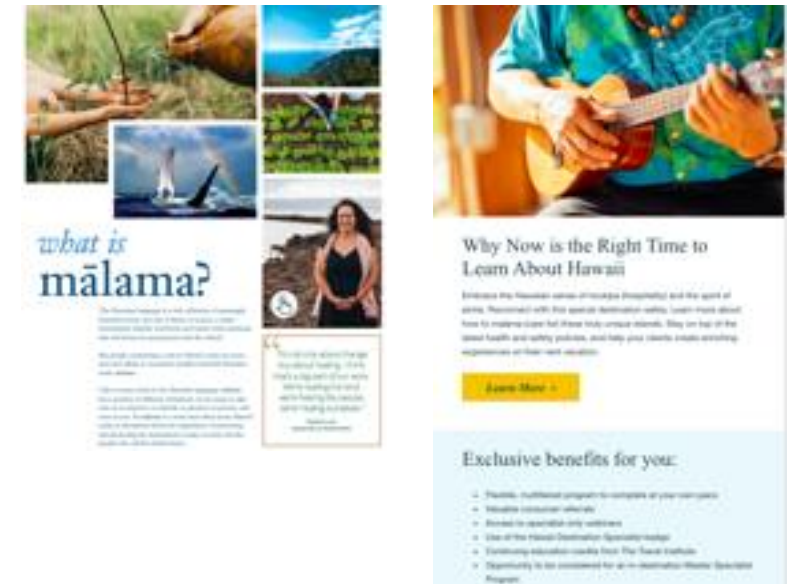
Christine Hitt, SFGATE
Dec. 2, 2021



Travel Trade

HTUSA travel trade strategy is to align with select travel partners and advisors who deliver the MHTT and cultivate them as advocates for mindful travel to Hawaii through education. This will be accomplished through:

- In-Person, Virtual, and On-Demand Training
 - Participate in consortia and wholesale in-person and virtual events and conduct on-going webinars
 - Conduct HTUSA in-person sales blitz events and record for on-demand viewing
 - Create a webinar library on travel agent portal for access 24/7
- Content Updates & Development
 - Update Expressly for Travel Professionals (EXTP) email and current travel agent portal and create Mālama Hawai'i landing page
 - Revise Hawai'i Destination Specialist (HDS) curriculum incorporating Mālama messaging
- Communications
 - Utilize HDS database to communicate the importance of encouraging clients to travel mindfully
 - Execute a trade media strategy that efficiently reaches qualified travel advisors encouraging HDS course completion
 - Invest in acquisition programs that attract new travel sellers that reach the MHTT



PGA TOUR Marketing Fund Program

A scenic view of a pond in Hawaii. In the foreground, a woman with long blonde hair and a black backpack is seen from behind, looking towards the pond. Other people are visible in the background, some walking along the shore. The scene is surrounded by lush greenery and trees, with a bright sky in the distance.

— MĀLAMA —
HAWAII



Budget

The
HAWAIIAN
ISLANDS

BUDGET ALLOCATION

Category	Amount
Consumer Direct	\$5,052,485
Public Relations and Promotions	\$572,340
Trade Marketing	\$1,057,875
Research	\$67,300
Staffing & Office	\$1,750,000
TOTAL	\$8,500,000



Mahalo

The
HAWAIIAN
ISLANDS

Discussion and Questions



7

Presentation, Discussion and/or Action on the GMT's Marketing Guidelines

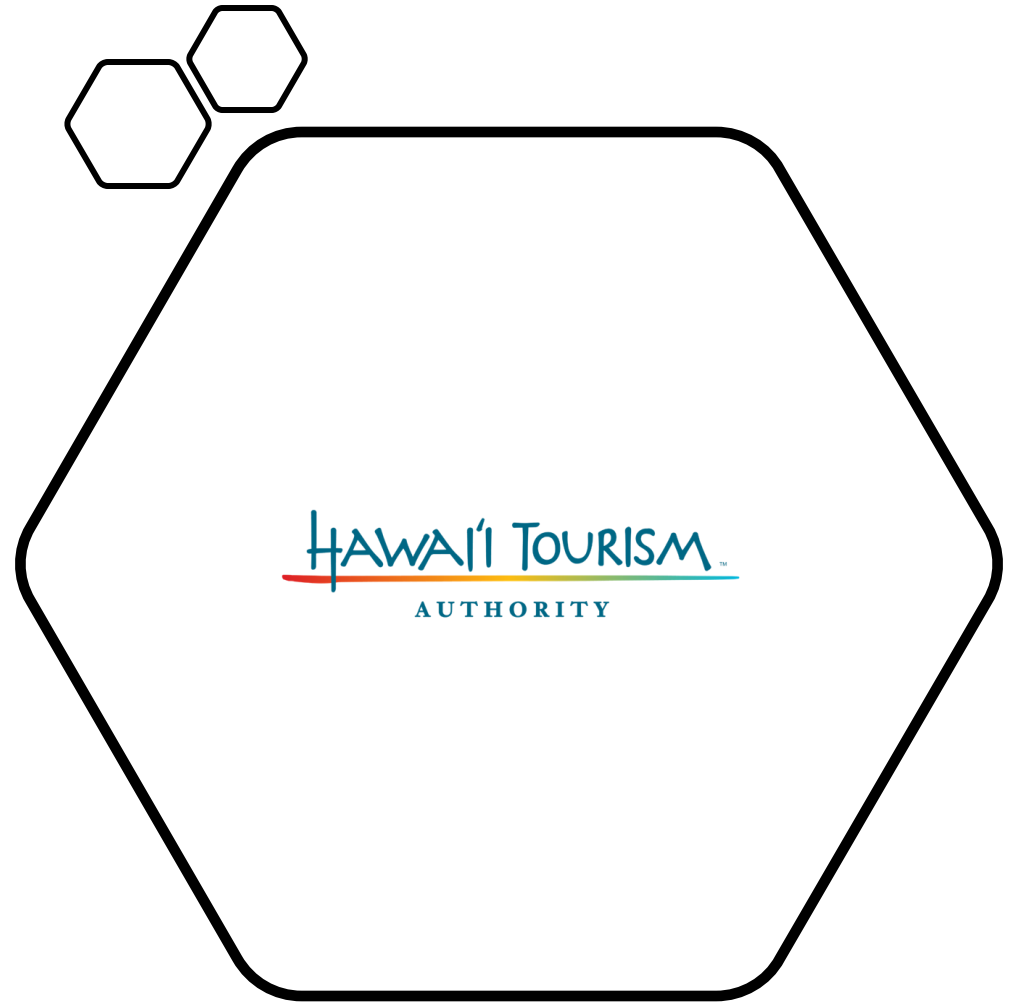
2022 Restricted Activities Branding Guidelines

Brand Marketing



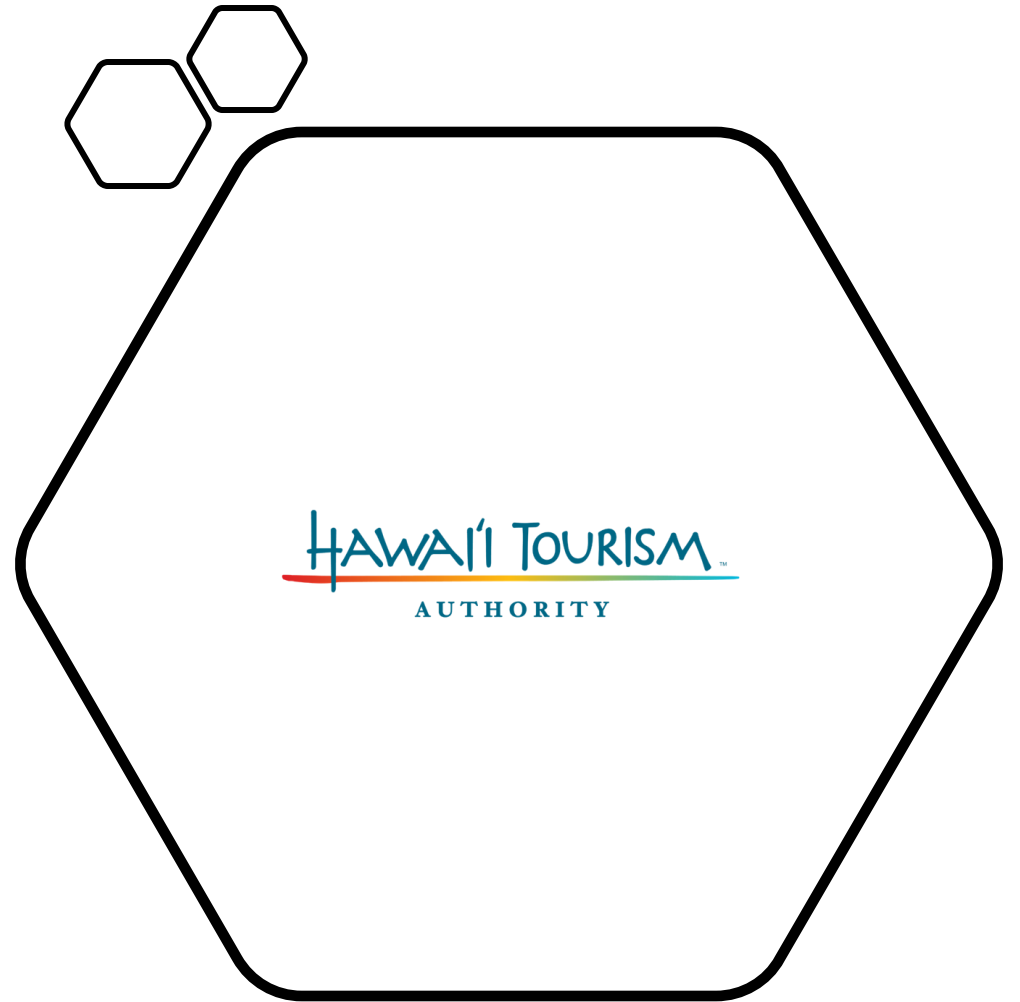
Purpose

To strategically guide the GMTs in executing brand marketing and management plans based on the changing market conditions and opportunities from each of the source markets while ensuring our resources are deployed effectively in alignment with HTA's Strategic Plan.



Measures of Success (Abbreviated)

- Increase percentage for “visitors recall hearing or seeing information about safe and responsible travel” compared to the most recent study
- Improve Hawai‘i’s ratings for “value” and “unique experiences” compared to the most recent study
- Improve score in perceptions of uniqueness of the destination for prospective visitors compared to the most recent study
- Increase percentage of consideration for visiting Hawai‘i within the next 12 months compared to the most recent study



Ongoing Activities



- Crisis Communications (Translations)
 - COVID-19
 - Natural Disasters
- Government Relations
 - Embassy/Consulate
 - Sister City/State
 - National and Sub national agencies in market
 - Hawai'i government entities
- Website Development & Maintenance
- Social Media Campaigns
 - Organic
 - Paid/Boosted
 - Focused on Mālama Hawai'i and Kuleana Campaigns
- E-Newsletter Distribution
- Direct Consumer Education
 - General consumer inquiries
 - Travel Planner Fulfillment
 - Education focused on Mālama Hawai'i and Kuleana
- Media Support
 - Relations & Assistance
 - Press/Influencer Trips
 - Education focused on Mālama Hawai'i and Kuleana
- Travel Trade Education
 - General travel trade inquiries
 - Travel Planner Fulfillment
 - Training opportunities
 - Education focused on Mālama Hawai'i and Kuleana
- Community/Stakeholder Relations & Communication
- Digital Assets Development
 - Photoshoots
 - Video
 - Social assets
- CRM Database maintenance
- Planning & Coordination for branding campaigns, event marketing, future co-ops
 - Wholesalers
 - Airlines
 - Others
- Market Insights
- Media Clippings
- Admin Costs

8

Discussion on HTA's Future Global Branding Allocations Strategy and Guidance for Staff

MMA Budget Summary - 6 Years

As of January 24, 2022

	2017	2018	2019	2020	2021	2022
US	23,640,000.00	25,095,000.00	25,800,000.00	13,732,873.00	17,000,000.00	22,500,000.00
Canada	2,300,000.00	2,300,000.00	800,000.00	373,820.00	400,000.00	800,000.00
Japan	8,450,000.00	8,000,000.00	9,000,000.00	6,000,000.00	4,500,000.00	9,000,000.00
Korea	1,400,000.00	1,400,000.00	1,400,000.00	504,000.00	300,000.00	1,400,000.00
Oceania	2,000,000.00	2,000,000.00	1,900,000.00	1,111,827.00	400,000.00	1,900,000.00
Europe	900,000.00	900,000.00	400,000.00	132,694.00	-	-
China	2,650,000.00	1,900,000.00	1,900,000.00	680,767.00	-	1,800,000.00
Taiwan	200,000.00	200,000.00	200,000.00	300,000.00	-	-
Latin America	-	-	-	-	-	-
SEA	200,000.00	202,500.00	200,000.00	81,068.00	-	-
Hong Kong	200,000.00	200,000.00	-	-	-	-
Total	41,940,000.00	42,197,500.00	41,600,000.00	22,917,049.00	22,600,000.00	37,400,000.00
				Pandemic Reductions (\$40,025,000)		