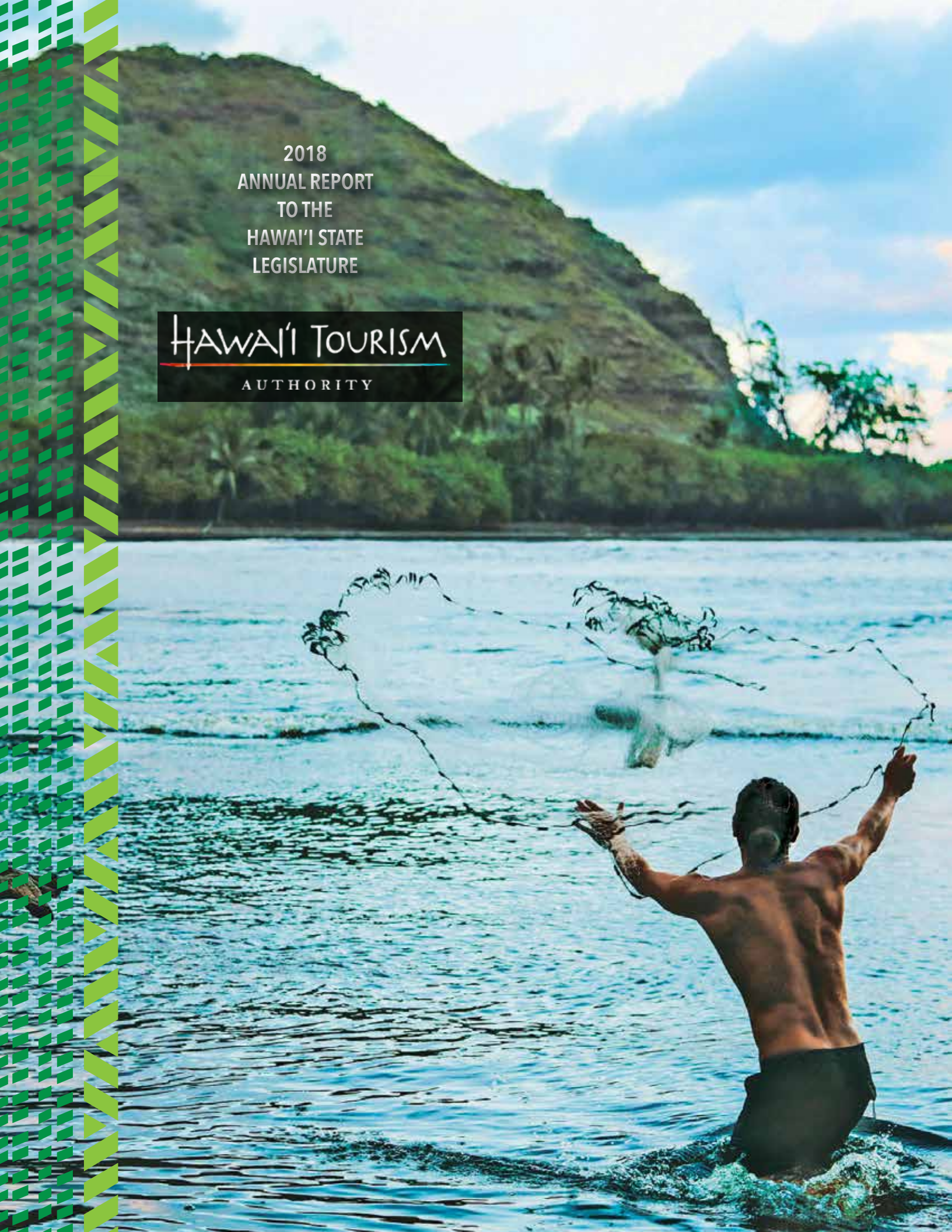


2018
ANNUAL REPORT
TO THE
HAWAII STATE
LEGISLATURE

HAWAII TOURISM
AUTHORITY





OUR MISSION

To strategically manage Hawai'i tourism in a sustainable manner consistent with economic goals, cultural values, preservation of natural resources, community desires and visitor industry needs.



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A NEW VISION

Aloha pumehana kākou,

We share this annual report for 2018 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 the tourism industry, as well as communities and residents on all islands.

We are moving forward into 2019 under new leadership determined to inject a re-energized, yet practical, approach to fulfilling the responsibilities of HTA and the management of tourism for the State of Hawai'i.

We will always stay true to our mission: *To strategically manage Hawai'i tourism in a sustainable manner consistent with economic goals, cultural values, preservation of natural resources, community desires and visitor industry needs.*

We will work with our contractors to market and promote the iconic brands of our islands to the world while maintaining a sustainable environment for both residents and visitors.

The future of Hawai'i, both as a home for families to blossom and for visitors to desire, begins at the community level. Healthy communities translate into happy residents, which, in turn, makes the visitor experience even more meaningful.

We welcome the opportunity to partner with the Legislature in encouraging tourism to flourish while doing all we can to help make Hawai'i's communities healthier and happier for all to enjoy.

Me ka ha'aha'a,

The Hawai'i Tourism Authority

HAWAI'I TOURISM AUTHORITY BOARD OF DIRECTORS

L. Richard Fried Jr., Chair

Founding Partner,

Cronin, Fried, Sekiya, Kekina and Fairbanks, Attorneys At Law
City and County of Honolulu

Craig G. Nakamura, First Vice Chair

Partner, Carlsmith Ball LLP

County of Maui

George Kam, Second Vice Chair

Ambassador of Aloha

At-Large

Micah Alameda

Marketing Manager, Nā Leo TV

County of Hawai'i

David Arakawa

Executive Director, Land Use Research Foundation of Hawaii

At-Large

Fred Atkins

Managing Partner, Kaua'i Kilohana Partners

County of Kaua'i

Sean P. Dee

Executive Vice President, Chief Marketing Officer,

Outrigger Enterprises Group

At-Large

Kyoko Kimura

Director of Owner Relations, Aqua-Aston Hospitality LLC

At-Large

Ku'uipo Kumukahi

Hawaiian Culture Manager,

Hyatt Regency Waikiki Beach Resort and Spa

At-Large

Sherry Menor-McNamara

President and CEO, Chamber of Commerce Hawaii

At-Large

Benjamin Rafter

CEO, OLS Hotels and Resorts

At-Large

Kelly Sanders

Vice President of Operations, Highgate

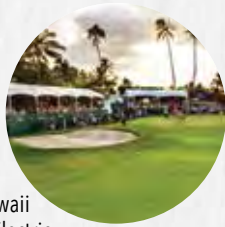
At-Large



2018: Hawai'i's Tourism Industry Resilient Despite the Challenges of Natural Disasters

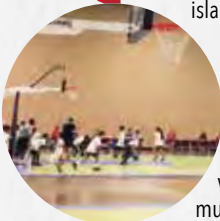
JANUARY 9

HTA renews its marketing partnership with the PGA Tour for the Sentry Tournament of Champions on Maui, Sony Open in Hawaii on O'ahu, and Mitsubishi Electric Championship at Hualalai on the island of Hawai'i through 2022.



JANUARY 24

The Hawai'i Convention Center and HTA secure agreements to host indoor soccer, basketball and volleyball tournaments over multiple years on the center's new sports courts.

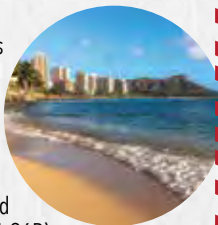


JANUARY 25

HTA issues the 2017 *Hawai'i Hotel Performance Report* showing hotels statewide averaged revenue per available room of \$212, and posted an average daily rate of \$264 and occupancy of 80 percent.

JANUARY 31

HTA reports Hawai'i's preliminary visitor statistics for 2017 showing record annual totals in visitor spending (\$16.78B), generated state tax revenue (\$1.96B), jobs supported by tourism (204,000), visitor arrivals (9.38M) and trans-Pacific air seats (12.24M).



MARCH 1-9

HTA's Spring Marketing Update shares its programs in major markets worldwide to 500 tourism industry members on O'ahu, followed by the Kipa Aloha Hawaiian Culture Workshop. Industry meetings are also held on Maui and the island of Hawai'i.



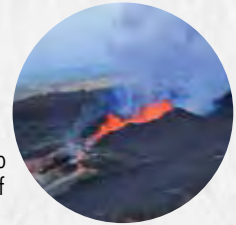
MARCH 25

Japan Airlines and Hawaiian Airlines establish a joint venture providing enhanced travel choices for flights between Japan and the Hawaiian Islands.



MAY 3

Kilauea volcano on the island of Hawai'i begins erupting, generating a lava flow in lower Puna.



MAY 11

Hawai'i Volcanoes National Park, the state's most popular visitor attraction, closes its main visitor areas due to heavy seismic activity from Kilauea volcano at Halema'uma'u crater.



MAY 25

HTA partners with the Department of Land and Natural Resources on several programs, including funding for a specialist to monitor social media sites for illegal tour activities to help protect Hawai'i's environment.

MAY 31

HTA allocates \$2.2 million in funding for marketing programs by Hawai'i Tourism United States and Hawai'i Tourism Japan in response to the drop in travel bookings for the island of Hawai'i due to Kilauea's eruption.



JAN

FEB

MAR

APR

MAY

JUN

FEBRUARY 8-10

HTA sponsors the Pacific Rim Cup at Aloha Stadium, an international showcase of professional soccer, featuring teams from Major League Soccer and the Japan Professional Football League.



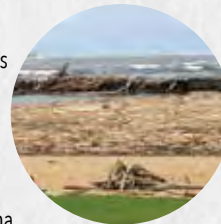
FEBRUARY 16

Governor David Ige declares 2018 as "Ke Au Hawai'i: the Year of the Hawaiian" to honor the history, traditions, language and culture of the Hawaiian people.



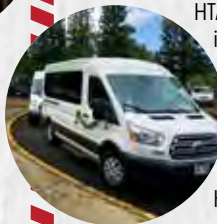
APRIL 13-15

A thunderstorm drenches Kaua'i's north shore with 50 inches of rainfall forcing the closure of Kūhiō Highway between Wainiha and Hā'ena. Parts of east Honolulu also suffer extensive damage from heavy rainfall and flooding.



APRIL 27

HTA provides \$180,000 in funding to support a free shuttle service on Kaua'i, between Wainiha and Hā'ena, for residents stranded by the closure of Kūhiō Highway.



JUNE 13

HTA debuts its redesigned, mobile-friendly website, HawaiiTourismAuthority.org, providing valuable data to tourism stakeholders and the general public.

JUNE 27

HTA completes the launch of the GoHawaii.com website, available in six additional languages: Japanese, Korean, Chinese, German, French and Spanish.



Hawai'i endured an uncharacteristic year for natural disasters statewide, the most notable of these being Kīlauea volcano's eruption and lava flows in lower Puna on the island of Hawai'i. Despite the challenges caused by the volcano and three major storms, Hawai'i's tourism industry continued to stay on pace to achieve record-high totals for visitor arrivals, visitor spending, generated state tax revenue and air seat capacity. In addition, strong support was provided to community festivals and special events, and an increased emphasis was placed on improving the integrity of the destination for future generations.

JULY 1

HTA partners with the Department of Health to launch an ocean safety public information campaign at airports statewide in high-traffic areas.



JULY 2

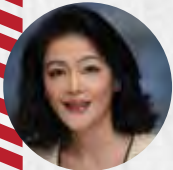
David Arakawa, executive director of the Land Use Research Foundation of Hawaii; **Micah Alameda**, marketing manager of Nā Leo TV; **Kyoko Kimura**, director of owner relations for Aqua-Aston Hospitality LLC; and **Benjamin Rafter**, CEO of OLS Hotels and Resorts, join HTA's board of directors.



David Arakawa



Micah Alameda



Kyoko Kimura



Benjamin Rafter

JUL

AUG

SEP

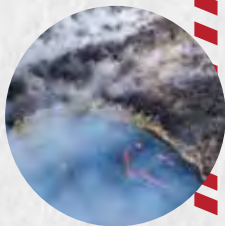
OCT

NOV

DEC

AUGUST 6

Kīlauea volcano activity ceases after lava flows in lower Puna cover 13.7 square miles of land and claim more than 700 homes over three months.



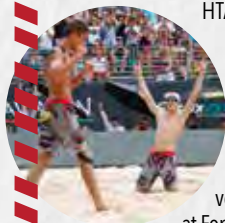
AUGUST 21-24

Hurricane Lane approaches Hawai'i as a Category 5 hurricane but weakens to a tropical storm as it passes the state, generating heavy rainfall and flooding on the island of Hawai'i, Maui and Kaua'i.

SEPTEMBER 9-12

Tropical Storm Olivia moves across the Hawaiian Islands, resulting in heavy rainfall, power outages and landslides in the County of Maui and on O'ahu.

SEPTEMBER 14-16



HTA and the Association of Volleyball Professionals present the AVP Hawai'i Invitational beach volleyball tournament at Fort DeRussy in Waikīkī.

SEPTEMBER 24-30

The NBA's Los Angeles Clippers open their training camp in Honolulu, which concludes with an exhibition game against the Sydney Kings of Australia. The Clippers also donate a new computer lab and fitness room to William P. Jarrett Middle School.



NOVEMBER 11

The NFL's Los Angeles Rams and HTA partner on a Hawai'i celebration at the Los Angeles Memorial Coliseum to promote Hawai'i travel and publicize the team's preseason game at Aloha Stadium in 2019.



NOVEMBER 27



HTA announces its support of 130 nonprofit programs statewide perpetuating Hawaiian culture, preserving natural resources and presenting community events in 2019.

NOVEMBER 29

HTA's board of directors appoints **Chris Tatum** as its new president and CEO.



Chris Tatum

OCTOBER 1-3

HTA presents the Global Tourism Summit with a focus on sustainability, global travel trends and Hawaiian culture. More than 2,200 attendees from 32 countries participate.



DECEMBER 10

Keith Regan is appointed as HTA's new chief administrative officer and **Karen Hughes** as the new vice president of marketing and product development.



Keith Regan

DECEMBER 20

Alaska Airlines launches the first-ever nonstop flights between Sacramento and Kona.



Karen Hughes



OVERVIEW OF THE HAWAII TOURISM AUTHORITY

The Hawaii Tourism Authority was established in 1998 through a legislative act to serve as the state's lead agency supporting tourism, Hawaii's largest industry.

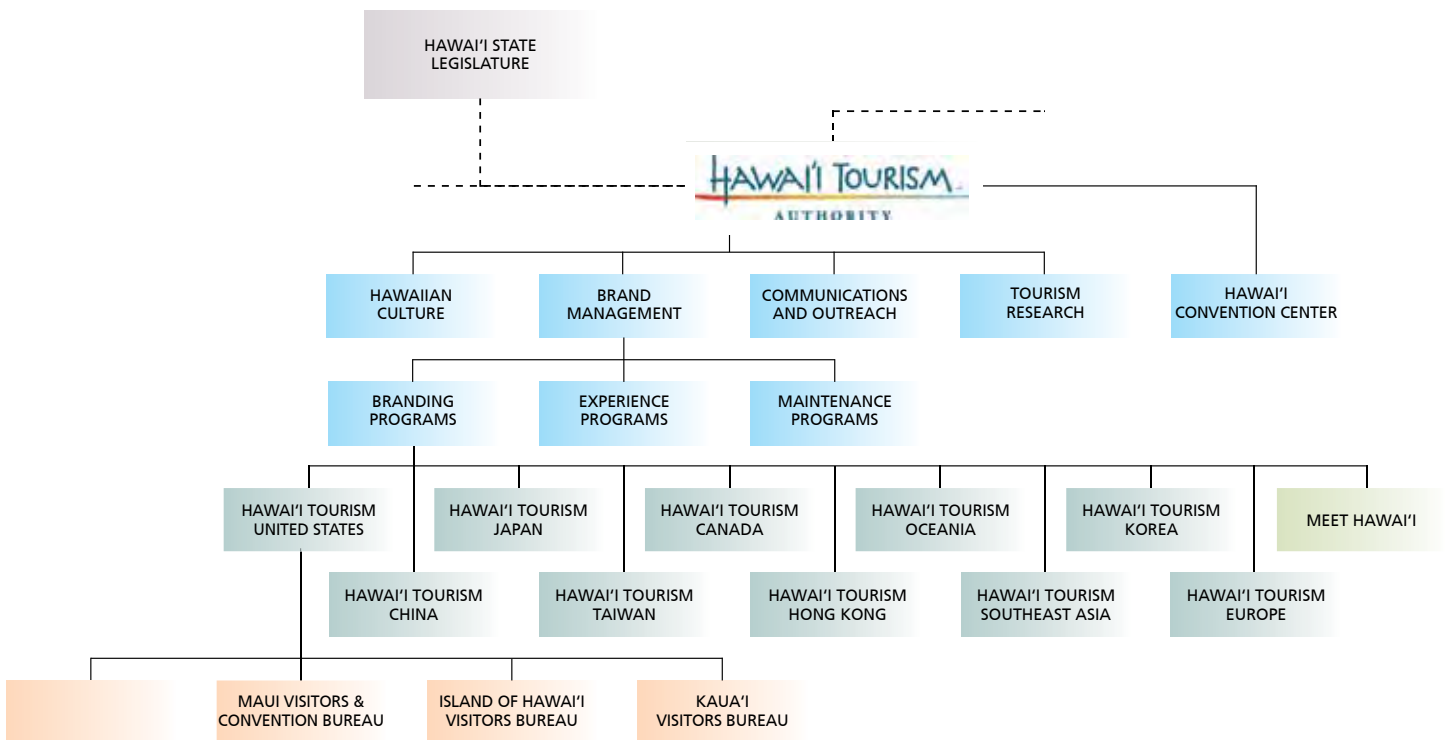
The same act also established the Tourism Special Fund, which utilizes a set percentage of Transient Accommodations Tax (TAT) collections assessed on hotels, vacation rentals and other accommodations to fund HTA's comprehensive marketing and destination management initiatives in support of Hawaii's tourism industry.

Among its responsibilities, HTA is charged with:

- Meeting the goals of its Five-Year Strategic Plan covering the years 2016 through 2020.
- Setting policy and direction from a statewide perspective about the management of tourism for the Hawaiian Islands.
- Enhancing the well-being of Hawaii's communities through initiatives focusing on responsible tourism.
- Supporting programs and initiatives perpetuating the Hawaiian culture, protecting Hawaii's natural resources, and presenting community festivals and events statewide.
- Managing programs and activities to sustain a healthy tourism economy for the state.
- Developing and overseeing implementation of the state's tourism marketing plans and programs.
- Serving as Hawaii's official source for information on tourism market research.
- Coordinating tourism-related planning and promotional outreach activities with stakeholders in the public and private sectors.
- Encouraging distribution of visitors throughout the Hawaiian Islands to achieve an improved balance statewide.
- Informing the tourism industry and general public with timely updates during emergency situations.
- Fostering greater collaboration with other state agencies.

OPERATIONS

HTA is administratively attached to the Hawaii State Department of Business, Economic Development and Tourism (DBEDT). HTA's president and chief executive officer reports directly to HTA's board of directors and is responsible for assisting the board in its responsibility to fulfill the mandates of Chapter 201B of the Hawaii Revised Statutes.



MEASURES OF SUCCESS

The Hawai'i Tourism Authority's Five-Year Strategic Plan, covering the years 2016 to 2020, serves as a guide for achieving short- and long-term goals of success based on research data, marketing intelligence, input from stakeholders and collaboration with industry associations. The following targets are proposed as a benchmark to measure HTA's success in realizing the goals of the strategic plan.

GOAL	MEASURE OF SUCCESS	RECENT VALUE(S)	PROPOSED 5-YEAR TARGET (2020)
Improve the Integrity of the Destination	Percentage of residents who agree that tourism has brought more benefits than problems. <i>Source:</i> <i>HTA Resident Sentiment Survey</i>	2010: 80% 2012: 67% 2014: 64% 2015: 66% 2017 (spring): 63% 2017 (fall): 61%	80%
Ensure Stable Economic Benefits	Real (inflation-adjusted) Gross Domestic Product generated by visitor-related expenditures. <i>Source:</i> <i>DBEDT/READ (2009 = 100)</i>	2010: \$9.57B 2011: \$10.24B 2012: \$11.86B 2013: \$11.86B 2014: \$11.94B 2015: \$11.80B 2016: \$12.15B 2017: \$12.58B	\$13.28B
Elevate Hawai'i's Value Perception	Percentage of potential visitors considering a trip to Hawai'i. <i>Source: HTA Marketing Effectiveness Study</i>	LATE 2017 U.S. West: 50% U.S. East: 30% Canada: 44% Japan: 41%	U.S. West: 52% U.S. East: 26% Canada: 40% Japan: 34%
Strengthen HTA's Reputation	Percentage of organizations in the tourism industry that recognize HTA as a leader. <i>Source: Evaluation of Leadership in the Hawai'i Visitor Industry</i>	2017: 24.2%	Baseline + 25% of the difference between baseline and 100% <i>(Example: If baseline is 50%, target is 62.5%)</i>

TRANSIENT ACCOMMODATIONS TAX COLLECTIONS

The collection of the Transient Accommodations Tax (TAT) and distribution of its revenues help strengthen the state's economy while also supporting public services provided by the four island counties that enhance the quality of life for residents statewide.

The TAT revenues are utilized by the City and County of Honolulu, County of Maui, County of Hawai'i and County of Kaua'i for essential purposes, including public education, public safety, infrastructure improvements and maintenance of park facilities.

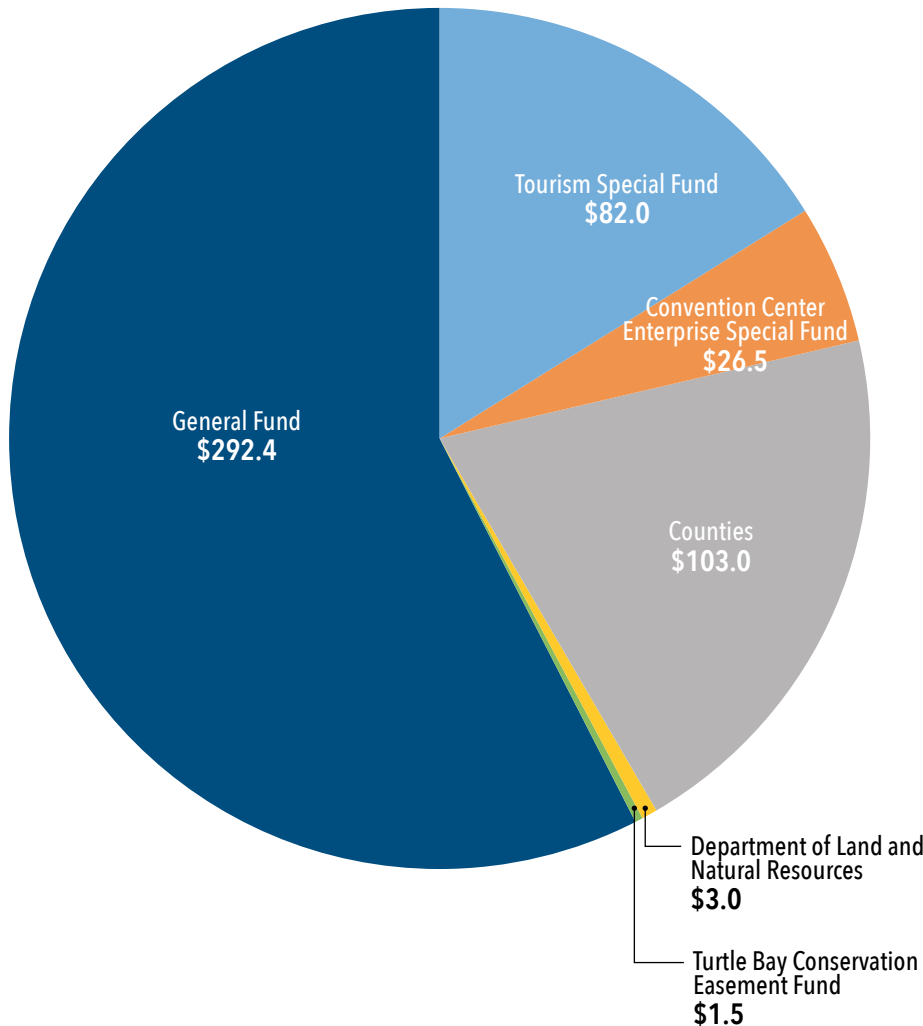
In fiscal year (FY) 2018, TAT collections totaled \$554.9 million, an increase of 9.0 percent compared to the \$508.4 million collected in FY 2017. The state's General Fund received \$315.2 million in TAT revenues in FY 2018.

The allocation of TAT revenues to the Tourism Special Fund and Convention Center Enterprise Special Fund was \$82 million and \$26.5 million, respectively, in FY 2018.

A total of \$103 million in TAT revenues was allocated to be shared by the four island counties. In addition, \$23.6 million was distributed to the Mass Transit Special Fund, \$3 million to the Hawai'i State Department of Land and Natural Resources, and \$1.5 million to the Turtle Bay Conservation Easement Special Fund.

FY 2017 TAT DISTRIBUTION (\$ MIL.)

FY 2018



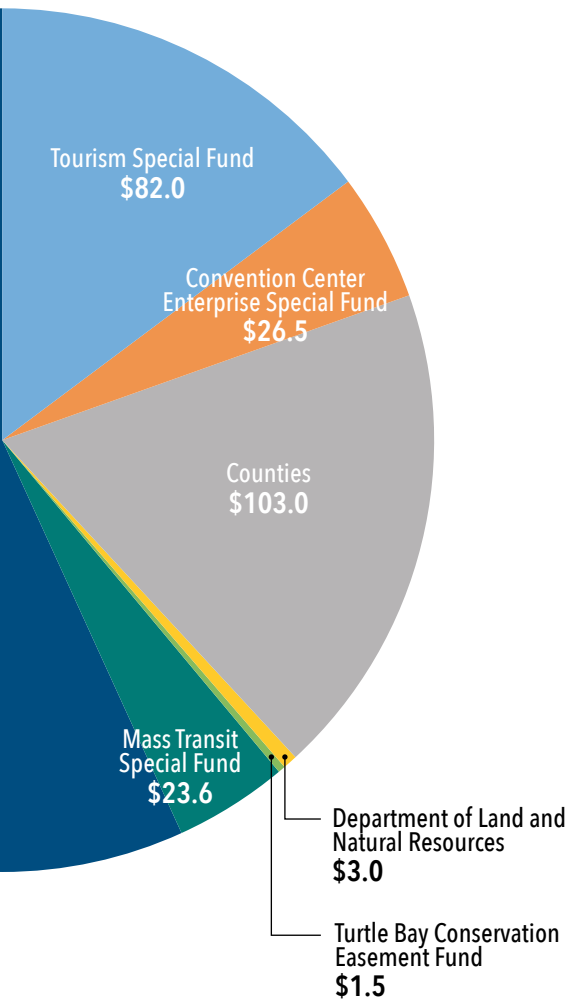
TRANSIENT ACCOMMODATIONS TAX (\$ mil.)

	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017	FY 2018	PROJECTED FY 2019
City and County of Honolulu	41.0	41.0	45.4	45.4	45.4	45.4	45.4
County of Maui	21.2	21.2	23.4	23.4	23.4	23.4	23.4
County of Hawai'i	17.3	17.3	19.2	19.2	19.2	19.2	19.2
County of Kaua'i	13.5	13.5	14.9	14.9	14.9	14.9	14.9

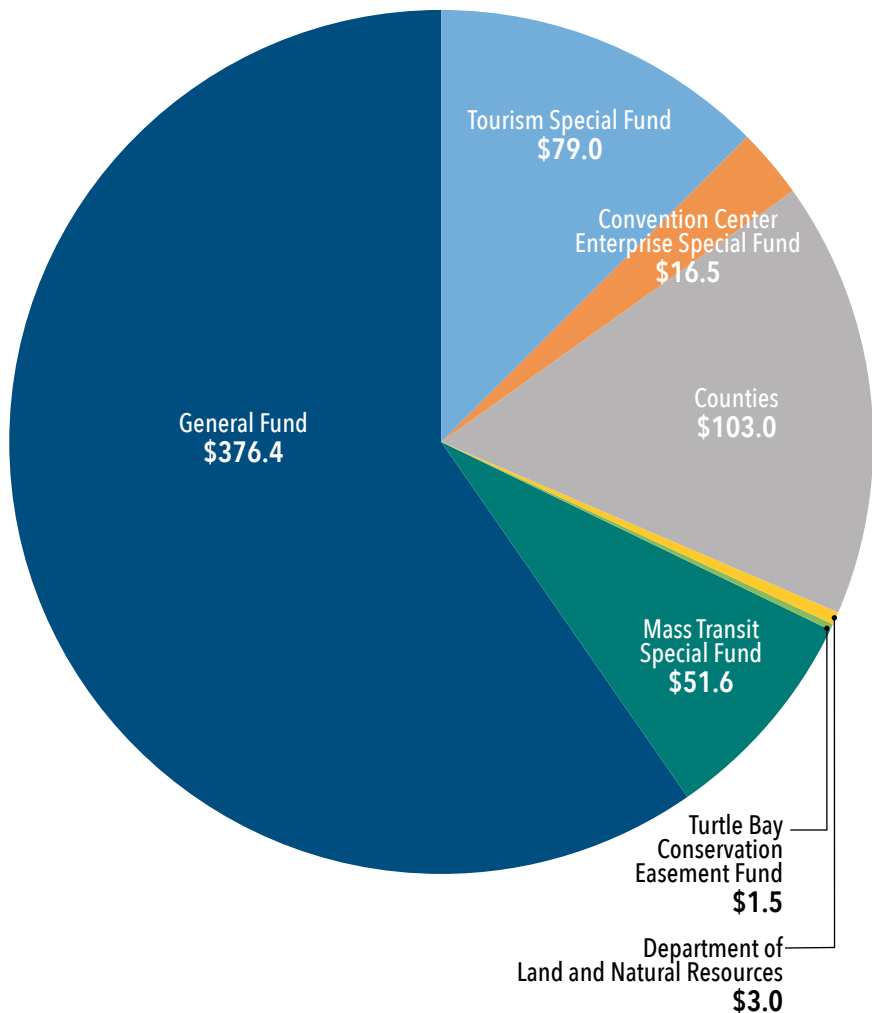
PERCENTAGE OF TAT REVENUES DISTRIBUTED BY COUNTY

CITY AND COUNTY OF HONOLULU	COUNTY OF MAUI	COUNTY OF HAWAI'I	COUNTY OF KAUA'I
44.1%	22.8%	18.6%	14.5%

TAT DISTRIBUTION (\$ MIL.)



FY 2019 PROJECTED TAT DISTRIBUTION (\$ MIL.)



HAWAI'I TOURISM AUTHORITY (HTA)

Fiscal Year (FY) 2018 Actuals (\$000)

REVENUES

TAT Deposits – Tourism Special Fund	\$ 82,000
Investment Pool Interest/Miscellaneous Receipts	279
TOTAL REVENUES	<u>\$ 82,279</u>

APPROPRIATIONS

FY 2018	\$ 88,515
TOTAL APPROPRIATIONS	<u>\$ 88,515</u>

HTA EXPENDITURES*

Maintaining Brand	\$ 5,541
Brand Experience	10,965
Brand Management	58,982
Communications	858
Tourism Research	2,324
Governance	3,799
TOTAL HTA EXPENDITURES	<u>\$ 82,469</u>

* Hawaiian culture is intertwined throughout all HTA programs and activities.

HAWAI'I CONVENTION CENTER (HCC)

Fiscal Year (FY) 2018 Actuals (\$000)

REVENUES

TAT Deposits – Convention Center Enterprise Special Fund	\$ 26,500
Convention Center Operations	10,646
Transfer from Tourism Special Fund for Convention Center	
Sales and Marketing	4,941
Investment Pool Interest/Miscellaneous Receipts	519
TOTAL REVENUES	<u>\$ 42,606</u>

APPROPRIATIONS

FY 2018	\$ 52,854
TOTAL APPROPRIATIONS	<u>\$ 52,854</u>

HCC EXPENDITURES

Convention Center Facility Operations:	
Operator Costs	\$ 10,695
Governance (includes convention center insurance)	477
Convention Center Sales and Marketing	4,886
Convention Center Repair and Maintenance	4,300
Total Expenditures Prior to Payments on Obligation to	
State Department of Budget and Finance	\$ 20,358
Payments on Obligation to State Department of Budget and Finance	\$ 20,000
TOTAL HCC EXPENDITURES	<u>\$ 40,358</u>



IMPROVE THE INTEGRITY OF THE DESTINATION

Ho'i hou i ka mole.

Return to the taproot.

Just as the taproot is the source of life for the healthy tree with strong branches that spread wide, so, too, is Hawaiian culture and the natural environment the source of life for Hawai'i's tourism future. They must always be nurtured to flourish.



HAWAIIAN CULTURE

Native Hawaiian culture is at the heart of the Hawaiian Islands' distinctiveness as a place and a people. There has been a renaissance in the usage of the Hawaiian language and Native Hawaiian practitioners increasingly have assumed more prominent responsibilities in the tourism industry. HTA supports programs perpetuating and promoting the significance, integrity and uniqueness of the Native Hawaiian culture and community by elevating the destination's global standing through genuine, only-in-Hawai'i visitor experiences.

2018 HIGHLIGHTS

- Provided \$1.3 million in funding to support 32 community-based programs statewide perpetuating Hawaiian culture through the Kūkulu Ola Program.
- Expanded HTA's long-term relationship with the Native Hawaiian Hospitality Association to strengthen the ties between the Hawaiian community and tourism industry through training, education and outreach.
- Executed a partnership with Hawai'i Investment Ready to facilitate and enhance the capacity of 12 Hawai'i-based social enterprises in the tourism sector.
- Conducted Ma'ema'e Program training in international markets to foster a deeper understanding and appreciation of Hawai'i's rich heritage and history.
- Honored 'Aha Pūnana Leo, Hawaiian Airlines and Aulani, A Disney Resort and Spa for their commitment to 'ōlelo Hawai'i (Hawaiian language) at the Global Tourism Summit's Tourism Legacy Awards Luncheon.
- Funded the program supporting the deployment of more cultural practitioners, Hawai'i entertainers and trainers in all global markets.

2019 FOCUS

- Supporting Hawaiian-language revitalization and normalization projects with statewide reach through a Request For Proposals process.
- Continuing to improve the execution of Native Hawaiian signature events and creating a more cohesive marketing plan for statewide festivals.
- Increasing dialogue and input from Hawaiian cultural practitioners in the tourism industry to advance HTA's work in improving the integrity of the destination.





KĀHEA: HARBOR GREETINGS

The Kāheha Cruise Ship Greeting Program showcases Hawai'i's Aloha Spirit and contributes toward ensuring a positive first and last impression of the Hawaiian Islands for cruise visitors. HTA supports this program in partnership with the Kaua'i Office of Economic Development, Lahaina Town Action Committee, Destination Hilo and Destination Kona Coast.

2018 HIGHLIGHTS

- Continued hosting Hawaiian entertainment, cultural demonstrations and other activities greeting cruise ship visitors at Nāwiliwili, Lahaina, Hilo and Kailua-Kona harbors.
- Supported a program created by the Hawai'i Department of Transportation's Harbors Division to improve the visitor experience at Hilo Harbor with new seating areas, improved signage, wall-mounted maps, welcome banners and a mural.

2019 FOCUS

- Expanding the Kāheha Program to Honolulu Harbor, Hawai'i's most visited port of entry.

NATURAL RESOURCES

The Hawaiian Islands are among the most ecologically diverse collection of islands on Earth and home to 27 of 38 Holdridge global life zones, which make it the single most habitat-rich location worldwide. The beauty of the Hawaiian Islands is unsurpassed and its fragility equally so. HTA is committed to supporting programs that protect Hawai'i's natural resources for generations to come.

HTA also plays a significant role in supporting community-led environmental initiatives through the Aloha 'Āina Program and other efforts directly benefiting Hawai'i's natural environment.

2018 HIGHLIGHTS

- Provided \$1.2 million to support 27 community-created initiatives statewide in their efforts to help maintain, preserve and protect Hawai'i's natural environment through the Aloha 'Āina Program.
- Collaborated on a partnership with the Hawai'i Department of Land and Natural Resources (DLNR) to support programs educating visitors and residents on the importance of protecting Hawai'i's natural and cultural resources. Public outreach included sponsoring television specials and placing educational content in more than 24,000 hotel rooms statewide, on Hawaiian Airlines flights and on Speedi Shuttle vans.
- Provided funding to support DLNR having a social media specialist to combat promotion of illegal visitor activities on state lands. Also implemented a social media campaign focused on encouraging visitors to be respectful of the environment.
- Funded and improved implementation of the Hawai'i Ecotourism Association's Sustainable Tourism Certification Program. Altogether, 49 operators providing activities to 2.3 million visitors were certified through September 2018.





2019 FOCUS

- Continuing a partnership with DLNR to implement a statewide pilot program of park and trail ambassadors encouraging responsible tourism.
- Continuing to support the Hawai'i Ecotourism Association's certifying of sustainable tourism operators and integrating them into HTA's global marketing efforts.
- Developing programs supporting the State Department of Business, Economic Development and Tourism's Green Business Program, which certifies hotels and events as environmentally friendly.
- Supporting Hawai'i Green Growth's efforts to form public and private partnerships moving Hawai'i's tourism industry toward a more sustainable future.



COMMUNITY INITIATIVES

HTA supports projects and programs statewide to address community concerns, promote increased interaction between residents and visitors, encourage a greater understanding about the tourism industry's value among residents, and foster opportunities to create economic benefits within communities. To achieve this, HTA is committed to:

- Strengthening the relationships between communities, the tourism industry and visitors.
- Supporting projects that are in alignment with Hawai'i's brand.
- Supporting events and experiences that are unique to the culture, traditions and characteristics of communities statewide.

2018 HIGHLIGHTS

- Supported 59 festivals, events and projects in communities statewide with \$1.06 million in funding through HTA's Community Enrichment Program. These community-based initiatives are designed to share unique, authentic experiences with visitors and enhance their interaction with residents. Five events received funding from HTA's Signature Incubator Program.
- Partnered with the County of Maui's Office of Economic Development and the International Festivals and Events Association to offer the Certified Festival and Event Executive Core Curriculum Programs, which support event organizers by enhancing their knowledge of marketing, management and operations. In 2018, 96 festival and event organizers earned the distinction of being named a Certified Festival and Event Associate.
- In conjunction with the Experiences of Hawai'i post-arrival marketing campaign, highlighted events through an enhanced calendar of events listing on GoHawaii.com, advertising in *This Week Hawaii* publications, and an increased social media presence via *Frolic Hawaii*.
- Established the Ho'okaulike Program, which supports projects strengthening community resources and enhancing Hawai'i's capability to manage tourism and address infrastructure concerns. These are projects seeking a balance between community needs and visitor desires to improve the quality of life for everyone in Hawai'i.





2019 FOCUS

- Encouraging responsible travel in the Hawaiian Islands through a pre- and post-arrival information campaign educating visitors about being respectful to the environment and culture. This outreach effort also includes providing information on selecting accommodations, transportation and activities that helps preserve the destination and benefits residents.
- Continuing to support festivals, events and projects for residents and visitors to enjoy through HTA's Community Enrichment Program and Signature Incubator Program.
- Leveraging the Experiences of Hawai'i post-arrival campaign to showcase the diversity of the Hawaiian Islands by highlighting HTA-supported events and projects.
- Continuing to utilize the Ho'okaulike fund to support projects balancing community needs with tourism industry interests.



ENSURE STABLE ECONOMIC BENEFITS

'A'ohe 'auwa'a pa'a
i ka hālau i ka mālie.

*No canoes remain in the sheds
in calm weather.*

Hawai'i tourism is most successful when all stakeholders collaborate, partner and collectively work for the common purpose of feeding the community. Everyone fishes together.



BRAND MANAGEMENT PLAN

HTA's Brand Management Plan describes the objectives, strategies, actions and evaluation approach set forth to achieve the goals outlined in its Five-Year Strategic Plan (2016-2020).

This document framed the efforts for 2018 in addressing the needs of Hawai'i's tourism industry and ensuring a continuity of business to maintain economic stability and prosperity for the Hawaiian Islands.

Initially, Hawai'i Revised Statutes Section 201B-6 required HTA to prepare a tourism marketing plan as a single comprehensive document, including in the plan its brand management efforts, target markets, performance goals and targets, and guidelines for programs implemented through contracts with destination marketing organizations.

During the 2014 legislative session, amendments were made to the statute for clarity and organization of the chapter, which called for replacing "marketing and promotion" with "brand management" where appropriate. For this reason, HTA prepares an annual brand management plan rather than a marketing plan.

The brand management plan includes detailed execution plans for brand marketing – including the individual brand management plans by major market area – as well as HTA's product, communications and research programs. It also presents an operational plan that organizes HTA for success.

In 2018, additional services were contracted to collect performance data on projects to assist HTA with program evaluations.



MAJOR MARKET MANAGEMENT

Hawai'i's tourism industry continued to drive the state's economic success in 2018, with record high totals for visitor spending, tax revenue generation, visitor arrivals and trans-Pacific air seats serving the Hawaiian Islands. Moreover, tourism continued to be Hawai'i's leading provider of jobs, supporting the livelihood and quality of life of residents and families statewide.

HTA's Major Market Management program aims to promote the destination by increasing demand through collaboration with industry partners statewide and in key global markets. While a primary goal is to increase visitor expenditures throughout the state, HTA also supports programs and initiatives to help perpetuate Hawaiian culture, preserve the environment and present festivals, events and projects that showcase the traditions and character of Hawai'i's communities.

HTA contracts marketing organizations – collectively known as its Global Marketing Team – to promote the Hawaiian Islands worldwide. The Global Marketing Team's coverage of major market areas in 2018 included the United States, Canada, Japan, China, Hong Kong, Korea, Taiwan, Oceania (Australia and New Zealand), Europe (Germany, the United Kingdom, France, Switzerland and Italy) and Southeast Asia (Malaysia, Singapore, Thailand and Indonesia).

The Global Marketing Team plays a critical role in implementing strategies that meet HTA's strategic objectives to attract high-spending visitors and increase their participation in activities during their time in the Islands. Marketing programs and tactics to sustain and enhance awareness of Hawai'i as an ideal destination for leisure and business travel differ in each major market, but typically encompass public relations, advertising, promotions, trade marketing, MCI (meetings, conventions and incentives) marketing, education and training, stakeholder communications, and industry partner relations.

O'AHU

O'ahu continued to draw the majority of the state's domestic and international visitors in 2018. Through September, visitor spending reached \$6.21 billion (+9.4% over the same period in 2017) fueled by a growth in average daily spending (+2.7% to \$202 per visitor) and increase in visitor arrivals (+4.6% to 4,478,639), marked by increases in both domestic (+7.3%) and international (+1.5%) arrivals.

The source markets comprising most of O'ahu's total visitor count were the U.S. West (29.7%), Japan (24.7%), U.S. East (21.1%), Oceania (6.7%), Korea (3.9%), Canada (3.6%) and China (2.5%).



AIR ACCESS

Total trans-Pacific air seats serving O'ahu was 6,240,168 through September, a year-over-year increase of 2.5 percent. Of that total, 3,574,473 (57.3%) seats were from domestic markets, with 2,665,695 (42.7%) seats from international markets.

In May, Hawaiian Airlines expanded its service to southern California by launching daily nonstop flights between Long Beach and Honolulu. United Airlines increased its California service to Honolulu as well, adding more flights from Los Angeles and San Francisco in December.

Air Canada increased its flights between Vancouver, British Columbia, and Honolulu from daily to twice daily during the winter months, beginning in October.

Sun Country Airlines entered the Hawai'i market for the first time, launching seasonal summer service between Minneapolis, Minnesota, and Honolulu, with a Los Angeles stopover, and seasonal winter nonstop service from Portland, Oregon, to Honolulu.

American Airlines expanded its air service to Honolulu with the addition of seasonal flights from Chicago, Illinois, starting in December.

COMMUNITY SUPPORT

HTA supported 35 community nonprofit organizations on O'ahu dedicated to perpetuating Hawaiian culture, protecting natural resources and showcasing community events.

Funding was provided to 14 Kūkulu Ola Program recipients committed to strengthening a broader understanding and appreciation of the Hawaiian culture, six Aloha 'Āina Program recipients focused on stewardship and managing Hawai'i's natural environment, and 15 Community Enrichment Program recipients for major community-based festivals, events and year-round programs.

O'AHU	2017		2018		STATEWIDE 2017		STATEWIDE 2018	
	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT
Community Enrichment Program	14	\$203,331	15	\$272,500	2	\$107,000	4	\$82,000
Signature Incubator Program	3	\$80,000	1	\$35,000	2	\$70,000	2	\$60,000
Kūkulu Ola	11	\$485,039	14	\$516,645	2	\$140,000	4	\$154,700
Major Festivals	3	\$401,000	3	\$381,000	1	\$300,000	1	\$300,000
Native Hawaiian Festivals	2	\$105,000	2	\$122,750	3	\$520,000	3	\$520,000
Aloha 'Āina	10	\$286,000	6	\$289,000	2	\$167,963	2	\$150,000
Safety and Security	1	\$318,000	1	\$318,000	3	\$271,000	3	\$434,505
Sports Events	11	\$2,537,000	12	\$3,555,000	3	\$65,000	–	–
Other Brand Experience Programs	1	\$100,000	–	–	–	–	–	–
Career Development	–	–	–	–	3	\$226,000	4	\$258,250
Visitor Bureau Funding and Other Direct Investments	–	\$3,437,345	–	\$3,736,732	–	–	–	–
TOTAL HTA PROGRAM FUNDING		\$7,952,715		\$9,226,627		\$1,866,963		\$1,959,455

COUNTY OF MAUI

Through September, the County of Maui – comprised of the islands of Maui, Moloka'i and Lāna'i – recorded increases in both visitor spending to \$3.99 billion (+11.8%) and visitor arrivals to 2,254,197 (+8.0%) compared to the same period in 2017.

Maui realized growth in visitor spending to \$3.88 billion (+11.8%), with visitors spending an average of \$219 (+3.5%) per day. Visitor arrivals grew to 2,217,043 (+7.8%). The majority of Maui's visitors arrived from the U.S. mainland (78.4%), with 50.3 percent from the U.S. West and 28.1 percent from the U.S. East. Following the U.S. mainland market were Canada (8.9%), Oceania (2.4%), Europe (2.2%) and Japan (1.7%).

Moloka'i reported a double-digit increase in visitor spending (+12.8% to \$28.5 million) supported by a growth in arrivals (+2.9% to 44,759).

Lāna'i achieved substantial growth in both visitor spending (+9.0% to \$80.2 million) and arrivals (+18.2% to 56,479).

AIR ACCESS

Total trans-Pacific air seats serving Maui grew to 1,997,697 (+13.8% year-over-year) through September. United Airlines added more than 135,000 air seats to Maui with the expansion of nonstop flights from Los Angeles and San Francisco, California; Chicago, Illinois; and Denver, Colorado. In addition, Hawaiian Airlines launched daily nonstop service between Portland, Oregon, and Maui in January. Air Canada increased its seasonal service from Calgary, Alberta, and Vancouver, British Columbia, in October.

COMMUNITY SUPPORT

HTA supported 33 nonprofit organizations dedicated to perpetuating Hawaiian culture, protecting natural resources and showcasing community events in the County of Maui. Funding was provided to six Kūkulu Ola Program recipients committed to strengthening a broader understanding and appreciation of the Hawaiian culture, 10 Aloha 'Āina Program recipients focused on stewardship and managing Hawai'i's natural environment, and 17 Community Enrichment Program recipients for major community-based festivals, events and year-round programs.



COUNTY OF MAUI	2017		2018		STATEWIDE 2017		STATEWIDE 2018	
	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT
Community Enrichment Program	20	\$259,000	17	\$257,500	2	\$107,000	4	\$82,000
Signature Incubator Program	1	\$35,000	1	\$35,000	2	\$70,000	2	\$60,000
Kūkulu Ola	9	\$234,326	6	\$211,000	2	\$140,000	4	\$154,700
Major Festivals	1	\$75,000	1	\$75,000	1	\$300,000	1	\$300,000
Native Hawaiian Festivals	–	–	–	–	3	\$520,000	3	\$520,000
Aloha 'Āina	9	\$354,604	10	\$409,000	2	\$167,963	2	\$150,000
Safety and Security	1	\$46,000	1	\$46,000	3	\$271,000	3	\$434,505
Sports Events	6	\$770,000	3	\$565,000	3	\$65,000	–	–
Other Brand Experience Programs	2	\$38,000	–	–	–	–	–	–
Career Development	–	–	–	–	3	\$226,000	4	\$258,250
Visitor Bureau Funding and Other Direct Investments		\$3,039,371		\$3,736,732	–	–	–	–
Moloka'i Visitors Association		\$148,844		\$934,183	–	–	–	–
Destination Lāna'i		\$155,774		\$934,183	–	–	–	–
TOTAL HTA PROGRAM FUNDING		\$5,155,920		\$7,203,598		\$1,866,963		\$1,959,455

KAUA'I

Through September, Kaua'i reported the largest year-over-year increases of all the islands in both visitor spending (+12.4% to \$1.55 billion) and arrivals (+9.0% to 1,053,299). In addition, average daily visitor spending increased to \$198 (+4.1%) per day.

Of Kaua'i's total visitor count, 82.3 percent arrived from the U.S. mainland, with 51.6 percent from the U.S. West and 30.8 percent from the U.S. East. Following the U.S. mainland market were Canada (5.4%), Europe (2.7%), Oceania (2.3%) and Japan (1.9%).



AIR ACCESS

Total trans-Pacific air seats serving Kaua'i increased substantially through September to 748,609 seats (+34.1% year-over-year).

United Airlines added more than 115,000 air seats to Kaua'i in 2018 with the expansion of nonstop daily flights from Los Angeles and San Francisco, California, and Denver, Colorado.

Hawaiian Airlines launched daily nonstop service between Oakland, California, and Kaua'i in July. In addition, Air Canada expanded its service to Kaua'i with the launch of three weekly seasonal flights from Vancouver, British Columbia.

Kaua'i's domestic air service in 2018 also included nonstop flights from Dallas, Texas; Phoenix, Arizona; Portland, Oregon; Seattle, Washington; and San Diego and San Jose, California.



COMMUNITY SUPPORT

HTA supported 18 nonprofit organizations on Kaua'i dedicated to perpetuating Hawaiian culture, protecting natural resources and showcasing community events.

Funding was provided to one Kūkulu Ola Program recipient committed to strengthening a broader understanding and appreciation of the Hawaiian culture, three Aloha 'Āina Program recipients focused on stewardship and managing Hawai'i's natural environment, and 14 Community Enrichment Program recipients for major community-based festivals, events and year-round programs.



KAUA'I	2017		2018		STATEWIDE 2017		STATEWIDE 2018	
	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT
Community Enrichment Program	14	\$240,000	14	\$224,210	2	\$107,000	4	\$82,000
Signature Incubator Program	1	\$35,000	1	\$35,000	2	\$70,000	2	\$60,000
Kūkulu Ola	2	\$75,000	1	\$50,000	2	\$140,000	4	\$154,700
Major Festivals	1	\$63,500	1	\$63,500	1	\$300,000	1	\$300,000
Native Hawaiian Festivals	–	–	–	–	3	\$520,000	3	\$520,000
Aloha 'Āina	6	\$218,500	3	\$105,000	2	\$167,963	2	\$150,000
Safety and Security	1	\$53,000	1	\$53,000	3	\$271,000	3	\$434,505
Sports Events	1	\$30,000	1	\$30,000	3	\$65,000	–	–
Other Brand Experience Programs	1	\$20,000	–	–	–	–	–	–
Career Development	–	–	–	–	3	\$226,000	4	\$258,250
Visitor Bureau Funding and Other Direct Investments		\$2,643,047		\$4,725,916	–	–	–	–
TOTAL HTA PROGRAM FUNDING		\$3,523,466		\$5,286,626		\$1,866,963		\$1,959,455

ISLAND OF HAWAI'I

The island of Hawai'i produced strong visitor spending and arrival numbers during the first half of 2018. This helped offset a downturn in travel bookings that occurred following the eruption of Kīlauea volcano, which began on May 3 and generated lava flows in the lower Puna district that continued for three months.

Through September, the island of Hawai'i reported an increase in visitor spending to \$1.84 billion (+5.1% over the same period in 2017), with visitor arrivals also up slightly to 1,321,174 (+0.6%). Average visitor spending also grew to \$188 (+2.4%) on a daily basis.

The island of Hawai'i's visitor count was primarily from the U.S. West (41.2%), U.S. East (27.1%) and Japan (10.5%) markets. Following these were arrivals from Canada (5.6%), China (2.9%), Oceania (2.9%) and Europe (2.8%).



AIR ACCESS

Total trans-Pacific air seats serving the island of Hawai'i increased by 34.5 percent through September – the highest year-over-year increase of all the islands – to 1,022,852 seats. Of that total, 980,509 (95.9%) air seats served Ellison Onizuka Kona International Airport at Keāhole and 42,343 (4.1%) served Hilo International Airport.

United Airlines added nearly 113,000 air seats to the island of Hawai'i in 2018 with expanded nonstop service from Los Angeles and San Francisco, California, and Denver, Colorado, to Kona, and expanded service from Los Angeles to Hilo.

In March, Hawaiian Airlines expanded its service with the launch of daily nonstop flights between Los Angeles and Kona. Air Canada increased seasonal service between Vancouver, British Columbia, and Kona to four weekly flights in December. That same month, Alaska Airlines launched nonstop service from Sacramento, California, to Kona.



COMMUNITY SUPPORT

HTA supported 20 nonprofit groups and community organizations on the island of Hawai'i dedicated to perpetuating Hawaiian culture, protecting natural resources and showcasing community events.

Funding was provided to six Kūkulu Ola Program recipients committed to strengthening a broader understanding and appreciation of the Hawaiian culture, five Aloha 'Āina Program recipients focused on stewardship and managing Hawai'i's natural environment, and nine Community Enrichment Program recipients for major community-based festivals, events and year-round programs.

ISLAND OF HAWAI'I	2017		2018		STATEWIDE 2017		STATEWIDE 2018	
	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT
Community Enrichment Program	13	\$275,000	9	\$227,090	2	\$107,000	4	\$82,000
Signature Incubator Program	1	\$35,000	1	\$35,000	2	\$70,000	2	\$60,000
Kūkulu Ola	7	\$230,000	6	\$217,855	2	\$140,000	4	\$154,700
Major Festivals	1	\$63,500	1	\$63,500	1	\$300,000	1	\$300,000
Native Hawaiian Festivals	1	\$50,000	1	\$50,000	3	\$520,000	3	\$520,000
Aloha 'Āina	3	\$122,761	5	\$197,000	2	\$167,963	2	\$150,000
Safety and Security	1	\$138,000	1	\$138,000	3	\$271,000	3	\$434,505
Sports Events	4	\$630,000	4	\$700,000	3	\$65,000	–	–
Other Brand Experience Programs	3	\$113,000	–	–	–	–	–	–
Career Development	–	–	–	–	3	\$226,000	4	\$258,250
Visitor Bureau Funding and Other Direct Investments		\$2,887,348		\$6,000,916	–	–	–	–
TOTAL HTA PROGRAM FUNDING		\$4,544,609		\$7,629,361		\$1,866,963		\$1,959,455



UNITED STATES

The U.S. mainland is Hawai'i's largest source travel market, accounting for more than 60 percent of total visitors to the Hawaiian Islands. Results from both the U.S. West and U.S. East markets were strong through September.

U.S. mainland airlift to the Hawaiian Islands accounted for 70 percent of trans-Pacific air seats, an increase of 11.6 percent year-over-year. The U.S. West market generated \$4.97 billion in visitor spending (+10.5%) and 3,140,814 visitor arrivals (+9.6%), while the U.S. East market generated \$3.54 billion in visitor spending (+9.4%) and 1,665,821 visitor arrivals (+8.4%).

Hawai'i Tourism United States (HTUSA) continued to target avid travelers and the subset market of avid explorers, the latter of which are typically millennial travelers.

2018 HIGHLIGHTS

- Launched *Hawai'i Rooted*, a 10-part video series viewed on digital platforms, which featured Hawai'i storytellers sharing unique experiences highlighting ancient and modern cultural values.
- Initiated the second year of HTUSA's New York City marketing campaign targeting the avid-explorer traveler with high-profile presentations of Hawai'i's fashion, art and music.
- Launched a Work From Hawaii promotional program for New York residents, providing participants with a unique work and living space, dedicated island ambassadors, and itineraries featuring hands-on Hawai'i experiences to be shared via their social channels.
- Countered the downturn in visitors to the island of Hawai'i resulting from the Kīlauea volcano eruption by implementing a comprehensive communications program emphasizing that the island was safe for travel.

2019 FOCUS

- Continuing to focus on the significance of responsible tourism by communicating with travelers the importance of being respectful of the environment while in Hawai'i.
- Implementing the final year of HTUSA's three-year New York City marketing campaign targeting avid-explorer travelers.
- Continuing to refine the *Hawai'i Rooted* campaign to include more storytelling focused on local experiences that connect with avid explorers and the travel trade.
- Continuing efforts to generate meetings, conventions and incentives leads and booking conversions, including an online training program to certify Hawai'i MCI specialists and an upgrade of the MeetHawaii.com website.

JAPAN

Japan is Hawai'i's largest international travel market, comprising 16 percent of total visitor arrivals to the state. Increases in airlift by low-cost carriers to Honolulu through Osaka, and the addition of nonstop flights between Tokyo and Kona, helped Hawai'i maintain healthy airlift from Japan in 2018.

Visitor arrivals from Japan began to decline in July in response to the Kīlauea volcano eruption on the island of Hawai'i, which began on May 3. The downturn necessitated implementation of an emergency marketing plan by Hawai'i Tourism Japan (HTJ) to help support the island's recovery.

Travel bookings and visitor arrivals were also affected by Tropical Storm Jebi, which struck western Japan in early September and forced the closure of Kansai International Airport in Osaka for two weeks. Additionally, the devastation caused by a powerful earthquake on the island of Hokkaido on September 6 had a major impact on travel from the region for several weeks.



2018 HIGHLIGHTS

- Continued the industry-wide Gohoubi (Reward) Hawai'i campaign, which featured 47 travel packages, reached more than 725,000 residents, and generated more than a billion impressions.
- Introduced the Kohala Coast Evening Shuttle, a collaborative partnership between seven Japan travel companies, providing visitors with free transportation to Kohala Coast restaurants, retail shops and activities.
- Collaborated with Hiroshima-based daily newspaper *Chugoku Shimbun* on the Hiroshima Festa program to promote Hawai'i travel. The program earned more than 166.7 million impressions and \$270,000 in publicity value.
- Implemented an island of Hawai'i marketing recovery plan in response to the decline in travel bookings caused by the Kīlauea volcano eruption. HTJ's efforts focused on securing travel industry partnerships, enhancing travel trade communications and educating media. More than 180 stories were generated, with a reach of more than 10 billion impressions and \$1.6 million in publicity value.



2019 FOCUS

- Encouraging Japan traveler bookings by promoting the Hawaiian Islands' unique experiences with special attention given to developing interest in regional cities via charter flights.
- Emphasizing neighbor island experiences through a variety of efforts – including educational opportunities with travel partners – to interest more Japan travelers in booking Hawai'i.
- Reaching out to Japan's affluent-traveler market in anticipation of All Nippon Airways' Airbus A380 aircraft launch in 2019.





CANADA

Canada is the second-largest international market and fourth-largest source market overall for visitors to Hawai'i. Despite currency fluctuation, Hawai'i Tourism Canada (HTCAN) reported that travel demand from Canada remained strong in 2018.

Through September, increases were reported in Canada visitor spending (+7.4% to \$801.3 million) and arrivals (+4.0% to 382,394) in Hawai'i compared to the same period in 2017.

2018 HIGHLIGHTS

- Collaborated with the O'ahu Visitors Bureau and Kaua'i Visitors Bureau to secure filming of the season finale of the reality TV series *Occupation Double*, Quebec television network V's much-watched take on *The Bachelor* and *The Bachelorette*.
- Accepted Hawai'i's award of Favorite Honeymoon Destination, presented by Canadian travel agents and fueled, in part, by HTCAN's comprehensive trade campaign focused on reaching romance travelers.
- Leveraged HTA's partnership with the NBA's Los Angeles Clippers to create a multifaceted promotional campaign in conjunction with its game against the Toronto Raptors on March 25, including contests, extensive social media, video content creation and an in-venue Hawai'i Night activation for more than 20,000 fans.
- Executed two highly successful group media familiarization trips and responded to multiple individual media requests generating more than 225 print, broadcast and online stories from January through August.

2019 FOCUS

- Strengthening cultural messaging within travel trade training events with the goal of increasing consumer awareness of Hawai'i's distinctive cultural appeal.
- Elevating the prominence of each distinct island brand in relation to available activities to further increase visitor interest in island hopping and overall length of stay in Hawai'i.
- Increasing advertising and promotional focus on the affluent-traveler segment with an objective of increasing length of stay, multi-island visitation and visitor spending.

OCEANIA

Hawai'i Tourism Oceania (HTO) encouraged travel from Australia and New Zealand to the Hawaiian Islands in 2018 by maintaining strong industry partnerships and implementing "always-on" marketing campaigns.

Despite challenges raised by the softening of the Australian dollar and New Zealand dollar against the U.S. dollar, increased airlift from New Zealand resulted in an overall boost in travelers from Oceania to Hawai'i.

In 2019, HTO aims to continue its focus on keeping Hawai'i top of mind as a value-for-money destination with travelers from Oceania while highlighting the experiences, beauty and culture of the Islands.

2018 HIGHLIGHTS

- Organized the multicity Aloha Down Under campaign with participation from 22 Hawai'i-based industry partners. Workshop events and destination training sessions reached more than 1,000 travel agents in five cities across Australia and New Zealand.
- Showcased Hawai'i on several mainstream television programs, including Australia-based Network Ten's *The Living Room* and *A Taste of Travel* series, and Flight Centre's *48 Hour Destination*, as well as the New Zealand food and travel series *Karena and Kasey's Kitchen Diplomacy* and lifestyle program *The Café*.
- Implemented the Month of Lei campaign in Australia, incorporating consumer and travel trade activities with multichannel digital outreach. The travel trade component included cooperative marketing activity and destination training events in Australia and New Zealand provided by Hawai'i Tourism United States' Island Chapters.
- Hosted two large Oceania travel agency conferences in Hawai'i: the House of Travel Owner-Operators Conference in May, and the annual TravelManagers' National Conference in August.

2019 FOCUS

- Building on Hawai'i's strong brand by sharing stories about the depth of experiences available across the Islands.
- Fostering partnerships delivering quality outcomes and enhancing Hawai'i's reputation as a world-class destination.
- Executing integrated campaigns aligning across consumer and travel trade channels while engaging a cross-section of partners.





KOREA

Through September, Hawai'i visitor arrivals from Korea totaled 178,158, a decrease of 1.1 percent over the same period in 2017. Average per-person per-day spending was \$289 in the same time frame, an increase of 12.7 percent.

Hawaii Tourism Korea (HTK) reported that air seat capacity from Korea to Honolulu was up 3.5 percent through September year-over-year. However, due to low-cost carrier Jin Air unexpectedly suspending flights between October 28 and December 28, along with Korean Air and Asiana Airlines reducing service in the fourth quarter, air seat capacity declined 8.6 percent for all of 2018.

2018 HIGHLIGHTS

- Organized the Hawai'i Lifestyle Week consumer event in July, collaborating with Hyundai Department Store locations in Seoul and Busan to target the high-end travel market.
- Conducted a Busan marketing campaign in partnership with four major airline partners: Korean Air, Delta Air Lines, Asiana Airlines and Japan Airlines. HTK's objective was boosting travel from a secondary outbound market, as well as generating ticket sales from Busan to Honolulu.
- Held an Aloha Media Marketplace and Hawai'i media reception in Seoul in June to develop relationships and business opportunities for Hawai'i industry partners.
- Developed the biweekly *Aloha Report with a Hawai'i Newscaster* video campaign, which based a Korea correspondent in Hawai'i with the objective of diversifying social media content on HTK's communication channels.

2019 FOCUS

- Organizing comprehensive marketing initiatives targeting residents in secondary metropolitan areas – such as Daejeon, Daegu and Gwangju – in collaboration with regional travel agency associations to further stimulate market demand for Hawai'i travel.
- Launching a new Aloha YouTube Channel to share Hawai'i destination videos in response to the popularity of video content and the YouTube platform among Korea travel consumers.
- Hosting a large-scale Connect to Aloha-themed Hawai'i Travel Trade Mission in Seoul and Busan with 20 Hawai'i partners to share in-depth destination information.

CHINA

Hawai'i Tourism China (HTC) continued to position the Hawaiian Islands as a desired stand-alone vacation destination in 2018, implementing a mix of multichannel marketing programs targeting affluent travelers and their families.

Through September, spending in Hawai'i by visitors from China increased 5.4 percent year-over-year to \$310.7 million, while average per-person per-trip spending grew 13.1 percent to \$2,722, the highest of all travelers to Hawai'i.

Hawai'i was named Most Impressive Family Destination by Chinese-language online community Sina Travel, and was included in listings of Top 10 Overseas Travel Destinations, Top 10 Island Destinations, Top 10 Honeymoon Destinations and Top 10 Kid-Friendly Destinations by China-based travel services provider Ctrip.

2018 HIGHLIGHTS

- Launched the Diamond of Islands campaign, an interactive diamond-hunting digital game and series of offline components targeting couples. The campaign generated more than 10 million impressions and exceeded \$3 million in public relations value.
- Launched the Island Styles of Seasons campaign, which focused on photography sharing and travel products. The HTC campaign reached more than a million consumers, showcasing active lifestyles and fashion, which are qualities important to China travelers.
- Launched the Happy Healthy Hawai'i campaign, featuring iconic images of the Islands and hula performances at the Shanghai World Travel Fair in May. The fair attracted more than 60,000 attendees.
- Organized Camp Aloha 2018 in Hong Kong, Wuhan and Shanghai in April featuring more than 1,200 one-on-one meetings between 335 travel trade representatives from 16 first-tier and second-tier China cities and 23 partners from Hawai'i.

2019 FOCUS

- Continuing to inform China travelers about Hawai'i's ecotourism activities and attractions while also educating them on exploring the Islands in an environmentally responsible manner.
- Tapping into growing interest in the 'ukulele among China youth and seniors, and differentiating Hawai'i from other destinations through the showcasing of Hawaiian culture, music and hula.
- Continuing to implement consumer campaigns using integrated marketing channels and strategies to target travelers interested in authentic Hawai'i experiences.





TAIWAN

Competition for outbound Taiwanese travelers was fierce in 2018, especially from Asian and European destinations. Supported by Hawai'i Tourism Taiwan's marketing efforts, Hawai'i realized growth in average length of stay (+21.3% to 9.35 days), visitor expenditures (+8.5% to \$31.0 million) and average per-person per-trip spending (+15.7% to \$2,330) by Taiwan visitors through September.

2018 HIGHLIGHTS

- Collaborated with Nestle Taiwan on a campaign tied to the release of *Jurassic World: Fallen Kingdom*. The campaign included a sweepstakes and grand-prize drawing for a trip to Hawai'i.
- Created a co-op promotion with China Airlines and travel trade partners to sell special tour packages with Hawai'i promoted on billboards at one of Taipei's busiest metro stations.
- Launched an online campaign with Taiwan travel activities platform KKday to promote multiple Hawai'i attractions and activities. The campaign received more than 1.1-million viewers in its first month.

2019 FOCUS

- Highlighting Hawaiian culture with a Hawai'i-themed festival in Taipei featuring island-inspired brands, hula performers and 'ukulele musicians.
- Continuing to collaborate with air carriers and trade partners on Hawai'i promotions via social media and other digital platforms.
- Continuing efforts to generate prospective leads for incentive group travel from Taiwan.



HONG KONG

The Hong Kong outbound travel market is the fourth largest in Asia and 10th largest worldwide for international tourism expenditures. In addition, continuing development of the Hong Kong-Guangdong-Macau Bay Area provides improved transportation infrastructure and connectivity further strengthening Hong Kong as one of Asia's leading hubs for travel to Hawai'i, thus opening marketing opportunities for Hawai'i Tourism Hong Kong.

2018 HIGHLIGHTS

- Worked with China Eastern Airlines on a campaign promoting the carrier's route serving Hong Kong, Shanghai and Honolulu. The campaign reached nearly 800,000 followers on China Eastern Airlines' Facebook account.
- Organized an ecotourism-themed, multi-island press trip with some of Hong Kong's leading travel media. Coverage from the press trip generated more than 3 million impressions.
- Showcased the Hawaiian Islands at the inaugural Oceania Festival in Hong Kong, hosting several Hawai'i-themed exhibits. The festival earned more than 131,000 views online.

2019 FOCUS

- Continuing to build on Hong Kong traveler interest in ecotourism by promoting Hawai'i's natural wonders.
- Boosting family and high-end consumer travel to the Islands by highlighting authentic Hawai'i cultural experiences.
- Supporting travel-oriented television programs showcasing Hawai'i's unique attributes.



EUROPE

Hawai'i Tourism Europe promoted the Hawaiian Islands to travelers in the United Kingdom, Germany, France, Switzerland and Scandinavia in 2018. Through September, Hawai'i visitors from Europe totaled 110,878, a year-over-year increase of 4.3 percent. European travelers stayed an average of 13.2 days, the lengthiest of all of the state's visitor markets. Of total arrivals from Europe, 74.9 percent traveled to O'ahu, 43.3 percent to Maui, 32.9 percent to the island of Hawai'i and 26.1 percent to Kaua'i.

2018 HIGHLIGHTS

- Launched the Experience Our Aloha campaign featuring Aloha Ambassadors sharing unique stories about Hawai'i.
- Partnered with travel guidebook Lonely Planet and German tour operator FTI Touristik on a campaign focused on Hawai'i culture, outdoor activities and cuisine.
- Conducted the Aloha Europe sales mission in Germany, the United Kingdom and Denmark with 10 Hawai'i partners.

2019 FOCUS

- Launching a new campaign, Raise Your Senses, highlighting rich video content.
- Participating with Hawai'i partners in the Brand USA European Expo and IMEX Frankfurt trade exhibition.
- Continuing to interact with travel trade and media to increase exposure for Hawai'i through public relations and media.



SOUTHEAST ASIA

Hawai'i Tourism Southeast Asia continued building demand for travel to the Hawaiian Islands throughout 2018 in Malaysia, Thailand, Singapore and Indonesia. Hawai'i welcomed 50,596 visitor arrivals from Southeast Asia through September, a 135.6 percent increase over the same period in 2017.

2018 HIGHLIGHTS

- Collaborated with Singapore-based air carrier Scoot to develop a Hawai'i promotional video and media familiarization trip.
- Partnered with industry media on the installation of an augmented reality digital LED display at the Malaysian Association of Tour Travel Agents Fair in March.
- Collaborated with Kuala Lumpur, Malaysia-based AirAsia X in creating the Hawai'i promotional video *Paradise within Reach*.
- Conducted the Aloha Land of Smiles sales mission, which brought 19 Hawai'i representatives together for meetings with 74 agents from 50 Southeast Asia travel agencies.

2019 FOCUS

- In 2019, HTA will be reallocating marketing funds from Southeast Asia to other initiatives focused on destination management.



BUSINESS DESTINATION MANAGEMENT

Meet Hawai'i is a collaborative effort of HTA, the Hawai'i Convention Center and HTA's Global Marketing Team to market the Hawaiian Islands as a world-class destination to host meetings, conventions and incentive (MCI) programs. Hawai'i Tourism Global MCI oversees this market segment, developing strategies and implementing programs to generate new MCI business opportunities statewide, including citywide meetings for the Hawai'i Convention Center.

2018 HIGHLIGHTS

- Introduced the AlohaConnects program at the IMEX Frankfurt trade show in Germany. The program capitalizes on Hawai'i's strategic location and the strengths of the Global Marketing Team by focusing on the development of 78 new markets through the targeting of major business events, such as a world congress or international association conference.
- Produced the second annual Experience Aloha Business Exchange over eight days in June, during which the Global Marketing Team hosted 73 incentive and corporate travel buyers who experienced Hawai'i firsthand through pre- and post-exchange excursions to the neighbor islands. Experience Aloha participants met with 108 Hawai'i MCI stakeholders at the Hawai'i Convention Center, resulting in direct bookings with hotels, activities and event planners, along with multiple leads generated for future MCI events.
- Assisted Hawai'i Tourism Taiwan in securing Taipei-based Cathay Life Insurance's 50th Anniversary Incentive Program, which will take place on O'ahu in May 2019. The program consists of eight groups totaling more than 4,000 guests.
- In conjunction with the 'Elele Program, partnered with the Hawai'i Convention Center to sponsor events at the Council of Engineering and Scientific Society Executives CEO Annual Meeting in Cape Coral, Florida. The meeting's events highlighted scientific points of interest in Hawai'i and positioned the Islands as an ideal location for East-West gatherings.
- Formed the Hawai'i Convention Center Customer Advisory Board, a strategic think tank and client forum comprised of senior association executives and meeting professionals. Advisory board members met on O'ahu and shared their experiences and perspectives to help the Hawai'i Convention Center better serve the needs of meeting planners, attendees and stakeholders.
- The Hawai'i Convention Center secured multiyear agreements with three national sports organizations to host futsal (indoor soccer), basketball and volleyball tournaments using the facility's new sports courts.
- The Hawai'i Convention Center hosted citywide events for several major organizations, including the Association for Research in Vision and Ophthalmology, American Academy of Pediatric Dentistry, Asia Oceania Geosciences Society, IEEE Engineering in Medicine and Biology Society, and American Dental Association.
- The Hawai'i Convention Center earned multiple accolades, including a LEED Gold Certification from the U.S. Green Building Council, an award commendation from the Hawai'i Green Business Program, and recognition as a Po'okela Level Excellence in Leadership venue in the Hawai'i Green Business Program.



2018 HAWAI'I CONVENTION CENTER EVENTS

EVENT NAME	DATES	ACTUAL ATTENDANCE	OFFSHORE ATTENDANCE	TAX REVENUE STATEWIDE (\$)
AVID 2018	January 3-4	291	291	\$133,282
AAU Volleyball Hawaii Grand Prix 2018	February 17-19	3,064	401	\$183,663
Honolulu Festival 2018	March 9-11	18,648	4,023	\$1,842,588
HIM 2018	March 15-17	3,720	600	\$274,808
International Group 2018	March 26	4,112	4,112	\$1,883,351
2018 AACSB International Conference & Annual Meeting	April 22-24	1,050	1,050	\$480,914
ARVO 2018 Annual Meeting	April 28-May 3	11,466	10,401	\$4,763,797
AIG Premier Conference 2018	May 13	368	368	\$168,549
2018 AAPD Annual Session	May 24-27	3,819	3,158	\$1,446,406
Shinnyo-en Hawaii 2018	May 27	3,400	2,000	\$916,027
Asia Oceania Geosciences Society 15th Annual Meeting	June 2-8	2,223	1,935	\$886,256
International Group 2018	June 8	2,500	2,500	\$1,145,033
2018 Aloha International Piano Festival	June 16-23	77	4	\$1,832
Pacific Rim Championships 2018	June 22-24	1,600	160	\$73,882
International Group 2018	June 26-29	330	330	\$151,144
International Group 2018	July 3	1,752	1,704	\$780,455
40th Annual Conference of the IEEE Engineering in Medicine and Biology Society	July 16-21	2,771	2,641	\$1,209,613
International Group 2018	August 9-10	3,268	3,268	\$1,496,788
iBeauty Digital Hawaii 2018	September 16-17	83	0	0
International Group 2018	September 28	2,000	2,000	\$916,027
2018 Global Tourism Summit	October 1-3	2,200	863	\$395,266
International Group 2018	October 4-7	100	100	\$45,801
International Group 2018	October 5-7	100	100	\$45,801
ADA 2018 Annual Meeting	October 17-22	16,868	12,836	\$5,879,060
AECOM	November 12-16	105	80	\$36,641
11th Pacific Rim Futsal Cup 2018	November 27-December 2	3,136	1,680	\$769,462
2018 Honolulu Marathon Expo	December 6-10	38,805	22,300	\$10,213,698
International Group 2018	December 6	128	126	\$57,710
2018 Hoops in Hawaii D2 Power Invitational*	December 14-19	500	NA	\$229,007
Total Definite Bookings for 2018: 29 Events		128,484	79,031	\$36,426,861

* Projected figures. Actual totals unavailable at the time of printing.

2019 HAWAI'I CONVENTION CENTER EVENTS

EVENT NAME	DATES	PROJECTED ATTENDANCE	TAX REVENUE STATEWIDE (\$)
AAU Trans Pacific Championships	January 18-21	2,300	\$348,090
SGO Annual Meeting 2019	March 12-19	1,800	\$824,424
HIM 2019	March 21-23	4,500	\$274,808
Varsity Spirit Championships	April 18-20	960	\$302,289
Jump Dance Convention 2019	May 23-26	1,500	\$137,404
NMA Annual Convention & Scientific Assembly 2019	July 26-31	2,000	\$916,027
OceanObs'19	September 14-20	1,200	\$549,616
American Studies Association Annual Meeting 2019	November 6-10	2,500	\$1,145,033
Total Definite Bookings for 2019: 8 Events		16,760	\$4,497,691

2019 FOCUS

- Capitalizing on the 2018 Experience Aloha Business Exchange's success and positive feedback, Hawai'i Tourism Global MCI will facilitate a third annual conference in November 2019 on Maui.
- Concentrating the AlohaConnects program's efforts on prospecting and responding to Request For Proposals for the hosting of world congresses and international association conferences set to make their destination selections in 2019 for events being held in 2021, 2022, 2023 and 2024.
- Launching the MCI five-year strategic plan and collaborating with the Global Marketing Team and Hawai'i Convention Center to achieve a 4 percent increase in MCI room night bookings.
- Initiating East-West MCI opportunities for the Hawai'i Convention Center through the Incentive, Conference and Event Society Asia Pacific, and facilitating marketing and capacity-building strategies for Hawai'i's homegrown global events, including Health Span Hawai'i 2019 and the inaugural Aloha Peace Summit.
- Continuing the 'Elele Program, with a possible expansion to the neighbor islands.
- Continuing biannual meetings of the Hawai'i MCI Advisory Committee to discuss high-level sales and marketing strategies for the Hawaiian Islands.
- Continuing monthly Alu Like Mai meetings between the Hawai'i Convention Center and hotel sales directors to review initiatives and strategies to develop leads and close business for the convention center.
- Convening biannual meetings of the Hawai'i Convention Center Customer Advisory Board in the spring and fall.
- Convening quarterly meetings with hotel general managers to discuss MCI matters, and biannual meetings with hotel revenue managers to discuss room rates.



DIGITAL

To ensure Hawai'i remains competitive and top of mind among travelers, HTA focuses on a digital marketing strategy centered on authentic content creation and a social media advertising program in major markets nationwide. The foundation of this outreach is the multilingual GoHawaii.com website.

A consumer-based website, GoHawaii.com is updated regularly to deliver relevant information about the products, activities and experiences of the Hawaiian Islands. The website also showcases the Hawaiian culture, traditions and history of the Islands to inspire travelers and interest them in visiting Hawai'i.

Additionally, HTA maintains and upgrades key business-to-business sites, including HawaiiTourismAuthority.org, MeetHawaii.com and others targeting travel trade professionals.

2018 HIGHLIGHTS

- Completed the launch of GoHawaii.com in six additional languages: Japanese, Korean, German, Spanish, French and Chinese. Also launched a personalization campaign providing targeted customized content to website visitors.
- Launched a social media brand awareness advertising campaign on Facebook and Instagram featuring 15 video clips highlighting Hawai'i places and lifestyle. The campaign was implemented in all major markets, except the United States and China, generating 2.3 million video views, 7.5 million post engagements and 29.1 million impressions through September.
- Launched the redesigned HawaiiTourismAuthority.org website in June featuring richer industry-focused content and an improved user experience.
- Continued to build a sustainable community engagement program sharing stories about food through the WeShare Hawaii mobile application. Interaction between curators and users of WeShare Hawaii was showcased via Facebook Live events held statewide.



2019 FOCUS

- Continuing to develop relevant and engaging content for deployment across all digital platforms while also leveraging user-generated material.
- Continuing to enhance and develop new functionalities for GoHawaii.com and driving quality traffic to the site through search engine optimization and paid search.
- Integrating HTA's message of responsible tourism into social advertising and social content.





ELEVATE HAWAI'I'S VALUE PERCEPTION

Ke one lau'ena
a Kāne.

The rich, fertile land of Kāne.

Hawai'i's true beauty is discovered in its authenticity, timeless cultural legacy, traditions and a way to live life found nowhere else, and a word no other destination can claim or copy: Aloha.



NATIVE HAWAIIAN FESTIVALS

HTA annually supports numerous Native Hawaiian festivals and events through its Major Festivals and Product Development programs. To perpetuate greater awareness, appreciation and knowledge about Hawai'i's indigenous culture among residents and visitors, HTA continues to be the main sponsor of six signature Native Hawaiian festivals and many other events and festivals throughout the Islands.

2018 HIGHLIGHTS

- Continued as a major sponsor of the statewide Aloha Festivals and King Kamehameha Celebration events.
- Served as a major sponsor of prominent Hawaiian cultural festivals and events reaching resident and visitor audiences statewide. Events include the Prince Kūhiō Celebration, Prince Lot Hula Festival, Merrie Monarch Festival, Mele Mei and the Nā Hōkū Hanohano Awards.
- Sponsored numerous other Hawaiian cultural festivals statewide, with a focus on 'ukulele, kī hō'alu (slack-key) guitar and steel guitar musicianship, hula and celebrations tied to Hawai'i's heritage.

2019 FOCUS

- Continuing to support festivals perpetuating the Native Hawaiian culture.
- Continuing to assist Native Hawaiian festivals in building their attendance and participation by providing support with planning, marketing and executing of events, and developing sponsorship opportunities.



MAJOR FESTIVALS AND SIGNATURE EVENTS

HTA 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. These include cultural, arts and culinary celebrations showcasing Hawai'i's heritage and resident pride in their communities, which are of interest to travelers seeking authentic experiences.

Most HTA-sponsored signature events are strategically held in off-peak travel months to support tourism industry partners by increasing traveler interest in booking trips during these periods. For a complete listing of major festivals and signature events sponsored by HTA, visit GoHawaii.com.

2018 HIGHLIGHTS

- Sponsored the Maui Film Festival, which annually combines film and culinary interests with fun events over several evenings in June. Events include the Taste of Summer Opening Party at the Grand Wailea resort, Taste of Wailea culinary event, and film screenings at the Celestial Cinema at Wailea Golf Club's Gold and Emerald Golf Courses, and Maui Arts and Cultural Center.
- Sponsored Kōloa Plantation Days, which celebrates the sugar plantation roots of Kaua'i's south shore each July. The 10-day family-friendly celebration includes talk-story sessions and tours led by historians, a town rodeo and parade, a heritage craft fair with artisan demonstrations, and multiple sports and cultural events.
- Sponsored the Pan-Pacific Festival in Waikīkī, which annually promotes the sharing of cultures between the people of Hawai'i and Asia-Pacific region through cultural arts, crafts and stage performances, a ho'olaule'a block party and a parade. In 2018, the festival paid tribute to Hawai'i Gannenmono Celebrations, which recognized the 150th anniversary of the first group of Japanese immigrants to arrive in Hawai'i.
- Supported other signature events, including the Hawai'i Food and Wine Festival, Honolulu Festival, Kona Coffee Cultural Festival and the Hawai'i International Film Festival.

2019 FOCUS

- Continuing to broaden and deepen the interest of travelers in the Hawaiian Islands by showcasing its diverse appeal through world-class festivals and events highlighting the uniqueness of its cultures, music, arts and culinary traditions.
- Expanding HTA's statewide portfolio of major festivals and signature events by supporting new endeavors.



SPORTS MARKETING

The hosting of major sports events in the Hawaiian Islands serves the dual purpose of strengthening the state's economy and generating worldwide exposure of Hawai'i's brand among fans and followers of the teams, participants and events.

HTA's sports marketing strategy is to attract and fund premier sports events supporting the economic interests of Hawai'i and its residents, ensure tax dollars are being spent responsibly, and drive travel demand to the Hawaiian Islands.

2018 HIGHLIGHTS

- Sponsored 26 diverse sports events, including the PGA Tour's Sentry Tournament of Champions and Sony Open in Hawai'i, the LPGA's LOTTE Championship, Duke's OceanFest, the Queen Lili'uokalani Canoe Race, the IRONMAN World Championship triathlon, the XTERRA World Championship, the AVP Hawaii Invitational beach volleyball tournament, the NBA's Los Angeles Clippers training camp and exhibition game, the Maui Jim Maui Invitational and Hawaiian Airlines Diamond Head Classic college basketball tournaments, the Hawai'i Bowl college football game, and the Hawai'i Open pro tennis tournament.
- Established a comprehensive marketing partnership with the NFL's Los Angeles Rams featuring the Hawaiian Islands as the team's official destination partner during the 2018 regular season, and culminating with a pre-season game to be played at Aloha Stadium in August 2019.
- Extended HTA's sponsorship support of the Hawai'i Open pro tennis tournament. The competition included both men's and women's draws, featured some of the world's top-ranked players, and was held at the Neal S. Blaisdell Arena in Honolulu, December 21-23. Tournament matches were televised to audiences worldwide on the Tennis Channel.
- Hosted several volleyball, basketball and indoor soccer tournaments at the Hawai'i Convention Center, utilizing the sports courts it purchased in 2017. Tournament organizers are projecting increased participation in upcoming tournaments, which is a testament to the success of the courts. Additionally, the NBA's Los Angeles Clippers conducted a portion of its training camp and hosted its youth basketball clinic on the sports courts.

2019 FOCUS

- Continuing to implement HTA's sports marketing strategy; support sports events generating TV, print and online exposure in domestic and international markets; and help drive visitor traffic from all major markets, especially during off-peak travel periods.
- Continuing to showcase the Hawai'i brand to TV audiences in domestic and international markets through sports events highlighting the Hawaiian culture, natural beauty, Aloha Spirit and other qualities that distinguish the Hawaiian Islands as a travel destination.
- Expanding on already successful Hawai'i sports events and attracting new ones, including surfing, kayaking and other water sports set for competition at the 2020 Summer Olympic Games in Tokyo, Japan. It is expected that such events will draw visitors from domestic and international markets HTA's Global Marketing Team is focusing on.



INDUSTRY EVENTS

HTA utilizes tourism industry events to promote Hawai'i as a destination and inform travel trade and hospitality providers about the support, resources and partnerships available to enhance their business objectives in the Hawaiian Islands.

2018 HIGHLIGHTS

- Convened HTA's Global Marketing Team in Hawai'i over a 10-day period in March highlighted by the Spring Marketing Update and community stakeholder meetings on Maui and the island of Hawai'i. At the Spring Marketing Update, activities promoting Hawai'i travel in HTA's 10 major market areas worldwide and generating meetings business were provided to more than 500 industry partners. The update included a networking lunch and the Kipa Aloha Hawaiian Culture Workshop.
- HTA's Global Marketing Team and the Island Chapters promoted Hawai'i to international travel providers at the U.S. Travel Association's annual IPW Marketplace in Denver, Colorado, in May. IPW is the nation's leading international inbound travel trade show. The HTA-led contingent met with more than 200 tour operators and media to provide updates on Hawai'i travel.
- Hosted the Global Tourism Summit with the theme of "Charting the Course" in October. Hawaiian culture, sustainability, global tourism trends, innovation and technology were a focus of the summit, with sessions covering a breadth of topics vital to tourism's future in Hawai'i and worldwide. The summit attracted more than 2,200 attendees from 32 countries, featured 38 exhibitors, and included multiple networking and educational opportunities.

2019 FOCUS

- Presenting the annual Spring Marketing Update, which keeps Hawai'i tourism stakeholders informed about HTA's global marketing initiatives. Community stakeholder meetings will also be held on O'ahu and Kaua'i.
- Establishing a strong Hawai'i presence at the U.S. Travel Association's IPW Marketplace in Anaheim, California, in June, to support the marketing of international travel to the Hawaiian Islands.
- Hosting the Global Tourism Summit at the Hawai'i Convention Center in the fall to address issues important to the future of tourism in Hawai'i and destinations worldwide.



AIR ACCESS

Trans-Pacific air access is the lifeblood of the state's economy. A robust air transportation network connecting Hawai'i with domestic and international markets is vital to Hawai'i's tourism industry and essential to the quality of life residents enjoy. HTA's primary objective is to continue supporting initiatives and programs ensuring strong airlift for Hawai'i and its residents through a network of diversified routes provided by multiple carriers with customer bases in key markets.

2018 HIGHLIGHTS

- Recorded a 9.2 percent increase in total inbound seat capacity to Hawai'i from domestic and international markets through September.
- Recorded a 3.8 percent increase in international seat capacity to Hawai'i through September supported by new year-round service from Japan Airlines (Tokyo-Kona), AirAsia X (Kuala Lumpur-Honolulu) and Scoot (Singapore-Honolulu).
- Hawaiian Airlines, United Airlines, Delta Airlines, Alaska Airlines, Virgin America and Sun Country Airlines collectively provided new and/or expanded trans-Pacific air service to the Hawaiian Islands from 19 markets on the U.S. mainland.



2019 FOCUS

- Supporting Southwest Airlines' expected launch of nonstop trans-Pacific air service to the Hawaiian Islands.
- Supporting the launch of All Nippon Airways' nonstop trans-Pacific service between Tokyo and Honolulu utilizing its new Airbus A380 aircraft, which can seat up to 520 passengers per flight.
- Continuing to strengthen Hawai'i's trans-Pacific air-access portfolio by diversifying the number of carriers and routes serving each island county with a goal of maintaining the economic stability of Hawai'i's tourism industry.

CRUISE ACCESS

Cruise ships provide visitors with an alternative means of experiencing the Hawaiian Islands. HTA worked with its consultant, Access Cruise Inc., to maintain and develop cruise line business benefiting Hawai'i.

2018 HIGHLIGHTS

- Hosted the third annual Cruise Executive Summit attended by executives from Norwegian Cruise Line, Princess Cruises, Holland America Group, Royal Caribbean International and Carnival Cruise Line.
- Booked several inaugural callings, including MSC Cruises and Azamara Club Cruises.



2019 FOCUS

- Hosting the fourth annual Cruise Executive Summit in Hawai'i.
- Continuing to develop new and expanded cruise service with an increased focus on premium and luxury brands catering to higher-spending guests.
- Collaborating with cruise partners on the distribution of port calls within the Hawaiian Islands while also increasing the number of days spent in ports.



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 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. HTA's career development programs 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.

2018 HIGHLIGHTS

- Enhanced and expanded the annual LEI (Leadership, Exploration, Inspiration) Program. More than 1,000 students from 36 high schools on Kaua'i, Ni'i'hau, O'ahu, Maui, Moloka'i, Lāna'i and the island of Hawai'i participated, with more than 125 college student mentors volunteering their time to support the program. Best practices shared during career fairs have been incorporated into curriculums and coursework at Hawai'i Pacific University, the University of Hawai'i Maui College and Kaua'i Community College. Career fairs held statewide were also successful in securing participation from more than 115 businesses, including 33 hotels on Kaua'i, O'ahu, Maui and the island of Hawai'i.
- Continued to offer educational and networking opportunities to teachers and students through the Hawai'i State Department of Education's Career and Technical Education Hospitality and Tourism Program. These included participation in the Global Tourism Summit, which featured an international student debate and the Pacific Asia Travel Association's Hawai'i Chapter Student Forum.
- Introduced Innovation Days at the Global Tourism Summit, a three-day exercise that connected Hawai'i college students with companies to work collaboratively at developing prototypes for solving innovation challenges.
- Continued to support the Customer Service Certification Program and Tour Guide Certification Program offered by four University of Hawai'i community colleges with a goal of helping tourism industry professionals better understand how to enhance the visitor experience.

2019 FOCUS

- Continuing to work with the University of Hawai'i Community Colleges system, as well as industry partners, to support and promote workforce development programs for tourism industry professionals.
- Continuing to provide Hawai'i's high school and college students with educational and networking opportunities encouraging them to pursue careers in travel and hospitality.



SAFETY AND SECURITY

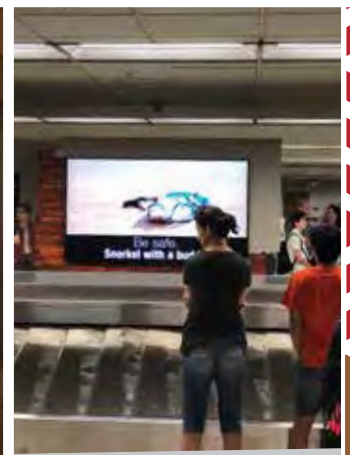
Hawai'i is valued by residents and visitors as a safe and secure destination. HTA is committed to supporting programs and collaborating with government agencies and organizations committed to the safety and security of everyone in Hawai'i. The statewide HTA-funded Visitor Assistance Program is essential to supporting visitors during an emergency or crisis. HTA also supports public information programs providing valuable advice on how to stay safe and avoid dangerous situations.

2018 HIGHLIGHTS

- Through September, HTA's Visitor Assistance Program responded to 1,048 cases and assisted 2,406 visitors who were victims of crime or in need of emergency support during their time in Hawai'i. Services included providing victims with hands-on assistance in making travel arrangements, replacing lost identification, providing support with hospital visits, furnishing meals to visitors who had their money stolen, and fulfilling other essential needs.
- Launched a public information campaign at Daniel K. Inouye International Airport on O'ahu, Kahului Airport on Maui, Līhu'e Airport on Kaua'i, and Ellison Onizuka Kona International Airport at Keāhole on the island of Hawai'i educating visitors and residents about ocean safety. The campaign included high-profile video displays at baggage claim areas.
- Continued to support the Junior Lifeguard Program, a statewide initiative educating and training thousands of Hawai'i youth about water-safety knowledge and water-rescue skills.
- Represented the tourism industry on the Hawai'i State Department of Health's (DOH) Drowning and Aquatic Injury Prevention Advisory Committee and supported the State of Hawai'i Drowning Prevention Conference and Snorkel Safety Workshop.
- Partnered with the DOH on a public information campaign advising residents and visitors on how to prevent rat lungworm disease and properly handle and prepare food.

2019 FOCUS

- Supporting the statewide Visitor Assistance Program and its mission to help visitors in need during times of crisis.
- Assisting government organizations and support agencies in enhancing safety and security measures statewide.
- Supporting a security camera program in Hawai'i's four counties to help deter criminal activity.



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.

2018 HIGHLIGHTS

- Published the *Monthly Visitor Statistics Report*, *Airline Seat Outlook Report*, *2017 Annual Visitor Research Report*, *2017 Annual Visitor Satisfaction and Activities Report*, *2017 Annual Visitor Plant Inventory* and *Quarterly Timeshare Report*.
- Published the monthly *Hawai'i Hotel Performance Report*, featuring key statistical data and analysis, including occupancy, average daily rate (ADR) and revenue per available room (RevPAR) for hotel stays on a statewide level and for O'ahu, the County of Maui, Kaua'i and the island of Hawai'i.
- Issued findings of the *2017 Resident Sentiment Study*.

CHANGES IMPLEMENTED

- Refocused the *Visitor Satisfaction and Activity Study* to include island-specific information useful to HTA stakeholders.
- Enhanced the monitoring and evaluation of HTA's sponsored festivals, events and sports.
- Implemented the annual *Stakeholder Leadership Survey* and *HTA Internal Survey*.

2019 FOCUS

- Launching the planning phases for the next *Statewide Tourism Strategic Plan*, including a product assessment.
- Creating and launching a visitor location tracking system.
- Creating and launching a vacation rental monitoring system.
- Collaborating with the State of Hawai'i Department of Business, Economic Development and Tourism (DBEDT) on expanding and maintaining the data warehouse.

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)
<i>Monthly Visitor Statistics and News Release</i>	Visitor Highlights	By the last day of the following month
<i>Island Highlights</i>	Visitor Highlights	By the last day of the following month
<i>Major Market Area Highlights and Fact Sheets</i>	Major Market Areas	By the last day of the following month
<i>Hawai'i Hotel Performance Report</i>	Infrastructure Research	By the last day of the following month
<i>Air Seat Outlook</i> (3 months)	Infrastructure Research	By the last day of the month prior
<i>Annual Visitor Research Report</i>	Annual Visitor Research	Annually, in the fall
<i>Visitor Plant Inventory</i>	Visitor Plant Inventory	Annually, in December
<i>Quarterly Visitor Satisfaction Monitoring Report</i>	Visitor Satisfaction and Activity	Quarterly
<i>Annual Visitor Satisfaction and Activities Report</i>	Visitor Satisfaction and Activity	Annually, in the fall
<i>Quarterly Timeshare Report</i>	Infrastructure Research	Quarterly
<i>Marketing Effectiveness Study</i>	Marketing Research	Spring
<i>Survey of Resident Sentiment</i>	Evaluation and Performance Measures	Annually, in December
<i>Daily Air Passenger Counts</i>	DBEDT	By 3 p.m. each workday
<i>Tourism Forecast</i>	DBEDT	Quarterly



STRENGTHEN HTA'S REPUTATION

He inoa 'ala.

A fragrant name.

Integrity. Credibility. Honor.
All are qualities HTA adheres to
in conducting its business and
leading Hawai'i tourism forward.



COMMUNICATIONS

HTA consistently keeps stakeholders, news media and the general public informed about its programs, initiatives, research and positions on issues involving Hawai'i tourism through news releases, a monthly e-bulletin, interaction with journalists, presentations and briefings, and industry events like the Spring Marketing Update and Global Tourism Summit in the fall.

2018 HIGHLIGHTS

- From January through November, HTA issued 83 news releases. Topics included the monthly visitor statistics and hotel performance report, support of community programs, crisis updates, and key announcements and initiatives.
- Accommodated more than 350 requests from local, national and international news media for interviews, statements and information pertaining to Hawai'i tourism.
- Provided important, timely information during crisis situations – especially natural disasters – to help mitigate the impact on travel demand to Hawai'i. Major crisis events included the flooding and highway closure on Kaua'i's north shore, Kīlauea volcano's eruption on the island of Hawai'i, and the approach of Hurricane Lane and Tropical Storm Olivia.
- Provided crisis communications support for the Emergency Command Center at the Hawai'i Convention Center during Hurricane Lane and Tropical Storm Olivia and staffed it around-the-clock with support from the Hawai'i Visitors and Convention Bureau, Hawai'i Tourism Japan and the Hawai'i Lodging and Tourism Association.
- Enhanced the design and user experience of HTA's website, www.HawaiiTourismAuthority.org, to be mobile-friendly and provide essential information about Hawai'i tourism for usage by industry stakeholders and business professionals.

2019 FOCUS

- Supporting the vision of HTA's new executive leadership in advancing HTA's mission and supporting Hawai'i's tourism industry for the benefit of residents statewide.
- Continuing to communicate the contribution of a strong, successful tourism industry to the state's economic foundation and Hawai'i's quality of life.
- Continuing to communicate the need to embrace sustainable destination management while maintaining the strength of Hawai'i's tourism industry for residents and communities statewide.



GLOBAL TOURISM SUMMIT

October 1-3, 2018

The theme of HTA's Global Tourism Summit, "Charting the Course," reflected the necessity of the Hawaiian Islands – and travel destinations worldwide – to continually seek a balance between the power and popularity of travel and tourism and their impact on residents and communities.

Hawai'i tourism industry leaders, stakeholders and professionals gathered with respected keynote speakers and thought leaders to address a diversity of subjects crucial to the future of tourism in the Hawaiian Islands and around the world. Among the subjects addressed during the three-day summit were sustainable tourism, global tourism trends, cultural tourism, alternative accommodations, illegal vacation rentals, the marketing of Hawai'i travel, and artificial intelligence.

KEYNOTE SPEAKERS



Stephen England-Hall
Chief Executive
Tourism New Zealand



Susie Richards Vowinkel
Industry Director for Travel
Google



Chris Malone
Managing Partner
Fidelum Partners



Michael Dominguez
Senior Vice President and Chief Sales Officer
MGM Resorts International



2018 HIGHLIGHTS

- More than 2,200 attendees from 32 countries and speaking 19 languages participated in the summit, which focused on the importance of sustainability, global travel trends and Hawaiian culture to tourism's future. Support was provided by 29 corporate sponsors and 38 exhibitors.
- Secured four thought-provoking and insightful keynote speakers addressing topics important to tourism:
 - **Stephen England-Hall**, chief executive of Tourism New Zealand, who presented *For Global Good: The Transformative Power of Tourism*.
 - **Susie Richards Vowinkel**, industry director for travel at Google, who presented *Travel in the Age of Assistance*.
 - **Chris Malone**, managing partner of Fidelum Partners, who presented *The HUMAN Brand: Building Guest Loyalty in the Digital Age*.
 - **Michael Dominguez**, senior vice president and chief sales officer for MGM Resorts International, who presented *Connecting the Dots: What Does All the Disruption Mean from a Strategic View*.
- Presented 'Aha Pūnana Leo, Hawaiian Airlines and Aulani, A Disney Resort and Spa with HTA's most prestigious honor, its Tourism Legacy Award for their achievements in and commitment to revitalizing and normalizing the usage of 'ōlelo Hawai'i (Hawaiian language) in everyday life.
- Highlighted the development and innovation of artificial intelligence (AI) through Sophia the Robot, a social humanoid robot, who participated in the interview session *Charting the Course for Technology: Talk Story with Sophia the Robot*. AI was also the featured topic of the summit's student debate competition.
- Hosted the summit's inaugural Innovation Days Hawai'i, which connected Hawai'i college students and companies with a goal of fostering innovation and entrepreneurship. Over the summit's three days, students developed ideas and worked collaboratively with mentors to solve innovation challenges facing companies. The students were then invited to showcase the prototypes they developed for solving the challenges in a summit expo.
- Hosted the Aloha Reception, featuring 20 Hawai'i chefs from throughout the Islands presenting dishes they created inspired by Hawai'i's multitude of cultures and island-grown ingredients.
- Hosted sessions addressing subjects important to maintaining a balance between tourism's success and community concerns, including illegal vacation rentals and the utilization of alternative accommodations.

2019 FOCUS

- Continuing to develop the Global Tourism Summit to address industry issues, forward-looking subjects and topics critical to the future of tourism in the Hawaiian Islands and globally.





HAWAI'I VISITOR STATISTICS STATEWIDE AND BY ISLAND

Source for All Tables: Hawai'i Tourism Authority

STATEWIDE	2017 FINAL	2018 FORECAST	% CHANGE**	2018 YTD*	% CHANGE YTD*
Visitor Expenditures	\$16.81B***	\$18.33B [†]	9.0%	\$13.62B	9.8%
Visitor Arrivals	9,404,346	9,959,201	5.9%	7,492,138	6.5%
Per-Person Per-Day Spending	\$198.5	\$206.23	3.9%	\$203.6	3.1%
Total Air Seats ^{†††}	12,235,608	13,136,532 ^{††}	7.4%	10,009,326	9.2%

O'AHU	2017 FINAL	2018 YTD*	% CHANGE YTD*
Visitor Expenditures	\$7.61B	\$6.21B	9.4%
Visitor Arrivals	5,690,752	4,478,639	4.6%
Per-Person Per-Day Spending	\$198.3	\$201.7	2.7%
Total Air Seats ^{†††}	8,113,768	6,240,168	2.5%

KAUAI	2017 FINAL	2018 YTD*	% CHANGE YTD*
Visitor Expenditures	\$1.81B	\$1.55B	12.4%
Visitor Arrivals	1,279,968	1,053,299	9.0%
Per-Person Per-Day Spending	\$188.4	\$197.6	4.1%
Total Air Seats ^{†††}	759,490	748,609	34.1%

ISLAND OF HAWAI'I	2017 FINAL	2018 YTD*	% CHANGE YTD*
Visitor Expenditures	\$2.39B	\$1.84B	5.1%
Visitor Arrivals	1,761,489	1,321,174	0.6%
Per-Person Per-Day Spending	\$185.2	\$188.0	2.4%
Total Air Seats ^{†††}	1,032,600	1,022,852	34.5%





MAUI	2017 FINAL	2018 YTD*	% CHANGE YTD*
Visitor Expenditures	\$4.68B	\$3.88B	11.8%
Visitor Arrivals	2,744,994	2,217,043	7.8%
Per-Person Per-Day Spending	\$211.9	\$218.8	3.5%
Total Air Seats ^{†††}	2,329,750	1,997,697	13.8%

MOLOKA'I	2017 FINAL	2018 YTD*	% CHANGE YTD*
Visitor Expenditures	\$34.6M	\$28.5M	12.8%
Visitor Arrivals	58,450	44,759	2.9%
Per-Person Per-Day Spending	\$124.2	\$137.0	9.3%

LĀNA'I	2017 FINAL	2018 YTD*	% CHANGE YTD*
Visitor Expenditures	\$105.8M	\$80.2M	9.0%
Visitor Arrivals	64,357	56,479	18.2%
Per-Person Per-Day Spending	\$483.8	\$417.4	-11.9%

* January-September 2018
 ** % Change 2017 Final vs 2018 Forecast
 *** Includes Supplemental Business Expenditures
 † Air and Cruise Only
 †† Does Not Include Charter Air Seats
 ††† Source: Scheduled Seats from Diio Schedules



HAWAI'I VISITOR STATISTICS GLOBAL SOURCE MARKETS

Source for All Tables: Hawai'i Tourism Authority

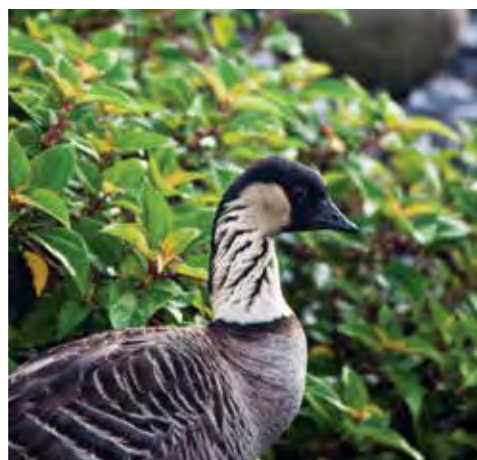
U.S. WEST	2017 FINAL	2018 FORECAST	% CHANGE*	2018 YTD**	% CHANGE YTD**
Visitor Expenditures	\$6.08B	\$6.70B	10.2%	\$4.97B	10.5%
Visitor Arrivals	3,843,780	4,148,030	7.9%	3,140,814	9.6%
Per-Person Per-Day Spending	\$174.5	\$179.5	2.9%	\$177.3	2.1%
Total Air Seats***	7,334,734	8,118,458	10.7%	6,131,662	11.5%

U.S. EAST	2017 FINAL	2018 FORECAST	% CHANGE*	2018 YTD**	% CHANGE YTD**
Visitor Expenditures	\$4.23B	\$4.68B	10.8%	\$3.54B	9.4%
Visitor Arrivals	1,998,788	2,146,882	7.4%	1,665,821	8.4%
Per-Person Per-Day Spending	\$209.7	\$218.1	4.0%	\$212.9	2.2%
Total Air Seats***	1,008,790	1,098,631	8.9%	862,886	11.7%

JAPAN	2017 FINAL	2018 FORECAST	% CHANGE*	2018 YTD**	% CHANGE YTD**
Visitor Expenditures	\$2.26B	\$2.38B	5.2%	\$1.75B	2.2%
Visitor Arrivals	1,587,781	1,580,127	-0.5%	1,175,960	-1.9%
Per-Person Per-Day Spending	\$239.5	\$252.4	5.4%	\$248.3	4.0%
Total Air Seats***	1,988,036	2,042,411	2.7%	1,526,386	1.3%

CANADA	2017 FINAL	2018 FORECAST	% CHANGE*	2018 YTD**	% CHANGE YTD**
Visitor Expenditures	\$1.04B	\$1.10B	5.5%	\$801.3M	7.4%
Visitor Arrivals	520,062	536,142	3.1%	382,394	4.0%
Per-Person Per-Day Spending	\$160.4	\$165.9	3.4%	\$170.0	4.4%
Total Air Seats***	462,889	488,872	5.6%	343,038	2.3%

OCEANIA	2017 FINAL	2018 FORECAST	% CHANGE*	2018 YTD**	% CHANGE YTD**
Visitor Expenditures	\$1.03B	\$1.14B	10.7%	\$804.1M	5.8%
Visitor Arrivals	395,362	418,406	5.8%	308,863	4.7%
Per-Person Per-Day Spending	\$269.0	\$279.6	3.9%	\$270.8	0.8%
Total Air Seats***	483,122	532,982	10.3%	400,932	11.1%



* % Change 2017 Final vs 2018 Forecast
 ** January-September 2018
 ***Source: Scheduled Seats from Diio Schedules

KOREA	2017 FINAL	2018 FORECAST	% CHANGE*	2018 YTD**	% CHANGE YTD**
Visitor Expenditures	\$494.1M	\$595.8M	20.6%	\$389.8M	15.1%
Visitor Arrivals	261,039	272,422	4.4%	178,158	-1.1%
Per-Person Per-Day Spending	\$262.0	\$300.0	14.5%	\$289.4	12.7%
Total Air Seats***	384,019	350,896	-8.6%	274,022	3.5%

CHINA	2017 FINAL	2018 FORECAST	% CHANGE*	2018 YTD**	% CHANGE YTD**
Visitor Expenditures	\$380.0M	\$398.1M	4.8%	\$310.7M	5.4%
Visitor Arrivals	151,299	149,724	-1.0%	114,132	-6.8%
Per-Person Per-Day Spending	\$331.5	\$357.9	7.9%	\$355.4	12.2%
Total Air Seats***	163,904	159,417	-2.7%	128,316	3.9%

TAIWAN	2017 FINAL	2018 FORECAST	% CHANGE*	2018 YTD**	% CHANGE YTD**
Visitor Expenditures	\$38.7M	\$38.0M	-1.6%	\$31.0M	8.5%
Visitor Arrivals	18,868	19,143	1.5%	13,301	-6.2%
Per-Person Per-Day Spending	\$244.1	\$244.1	0.0%	\$249.2	-4.6%
Total Air Seats***	31,186	31,824	2.0%	23,868	4.2%

EUROPE	2017 FINAL	2018 FORECAST	% CHANGE*	2018 YTD**	% CHANGE YTD**
Visitor Expenditures	\$329.8M	\$317.5M	-3.7%	\$257.3M	11.1%
Visitor Arrivals	139,771	144,850	3.6%	110,878	4.3%
Per-Person Per-Day Spending	\$180.7	\$168.1	-7.0%	\$176.4	4.4%

SOUTHEAST ASIA	2017 FINAL	2018 FORECAST	% CHANGE*	2018 YTD**	% CHANGE YTD**
Visitor Arrivals	43,657	-	-	50,596	135.6%

HONG KONG	2017 FINAL	2018 FORECAST	% CHANGE*	2018 YTD**	% CHANGE YTD**
Visitor Arrivals	3,859	-	-	2,918	-0.9%

Note: Hawai'i data related to visitor expenditures, per-person per-day spending, and total air seats is not available for the Southeast Asia and Hong Kong markets.



BRAND EXPERIENCE PROGRAM LISTINGS

O'AHU

Ka'ala Farm Inc.:
Mālama 'Āina School Internship Program
Ulu A'e Learning Center: Ulu A'e Kaiaulu Project
Ho'okua'āina: Kūkuluhou Internship Project
Hui o Ko'olaupoko: Hale Ike o He'eia
Pu'uhonua Society:
Producers Network for Cultural Artisans
Hawaiian Mission Houses Historic Site and Archives: Na Moku 'Eha Mele Series
Waimānalo Canoe Club Inc.: Hānai a Ao
PA'I Foundation: PA'I Nānā I Ke Kumu Series
Bernice Pauahi Bishop Museum:
Traditions of the Pacific
Kōkua Kalihi Valley Comprehensive Family Services: Art and 'Āina, Land-Based Traditional Arts Programming
The ARTS at Marks Garage:
Mo'olelo Maoli Series
Mālama Loko Ea Foundation: Holole'a, A Cultural Visitor Experience
Kumu Kahua Theatre: Demigods Anonymous
Kalihi-Palama Culture and Arts Society Inc.: 43rd Annual Queen Lili'uokalani Keiki Hula Competition
Department of Land and Natural Resources, Division of Forestry and Wildlife: Kaniakapūpū Ruins Protection and Education Project

MAUI COUNTY

Maui Nui Botanical Gardens Inc.:
Promoting Visitor and Community Connection to Traditional Hawaiian Crops
Hui No'eau Visual Arts Center:
Hui No'eau Art with Aloha 2018
Ma Ka Hana Ka 'Ike Building Program:
Ho'i la Hāloa
Hui O Wa'a Kaulua: Hui o Wa'a Kaulua Culture and Learning Program
Ke Ao I Ka Makani Hoehaili:
Kāehu Cultural Education Program
Hāna Arts: Hāna Legends

KAUA'I

Nā Kālai Wa'a o Kaua'i: Ho'okele Wa'a
National Tropical Botanical Garden: Kūpa'a I Ka Hale, The Hale Stands Firm
Kaua'i Museum Association Limited: Kaua'i Multimedia Gallery

ISLAND OF HAWAII'

Hawai'i Forest Institute:
Pilina Poina 'Ole, Connections Not Forgotten
Pōhāhā I Ka Lani: Mālama Hi'ilawe

Edith Kanaka'ole Foundation:
Lamākū o ka Na'auao o Honohonou
Carousel of Aloha: He Mo'olelo Ko Ka Lei/Hilo Lei Day Festival
Kohala Institute: Kauhale, Tours, Field Trips and Workshop Series at 'Iole
University of Hawai'i System Office of Research Services: He Lani Ko Luna

STATEWIDE

Lālākea Foundation: Ho'oulu Laka
'Aha Kāne Foundation: E Ho'okanaka
Hui Mauli Ola: Project Lonoaea

O'AHU

Mālama Nā Honu: Mālama Nā Honu Educational Outreach and Conservation Project 2018
'Ahahui Mālama I Ka Lōkahi: Kawainui Marsh Restoration Project
Hika'alani: Ho'okanaka II
Hawai'i Marine Animal Response: Stewardship of the Hawaiian Monk Seal
Department of Land and Natural Resources, Division of Forestry and Wildlife: New Paths for Ka'ena Point
University of Hawai'i System Office of Research Services: Outreach, Surveys and Removal for Invasive Species on O'ahu

MAUI COUNTY

Ka Honua Momona: Kahu Ho'īlina
Ma Ka Hana Ka 'Ike Building Program:
Wailuā Nui Restoration Project
Hawaiian Islands Land Trust: Ecological Restoration of Waihe'e Coastal Dunes and Wetland Refuge
Friends of the D.T. Fleming Arboretum at Pu'u Māhoe Inc.: Pāhana Ho'ola - Seeds of Hope 2018
Coalition for a Drug Free Lāna'i:
Lāna'i Limu Farm
Maui Nui Botanical Gardens Inc.:
Seed Storage of and Community Access to Maui Nui Native Plants
Kīpahulu 'Ohana Inc.: Kīpahulu Moku Mālama I Ke Kai
Coral Reef Alliance: Engaging Volunteers to Reduce Threats to Coral Reefs
The Nature Conservancy: Engaging the Community and Protecting the Native Forest of Maui and the Island of Hawai'i
University of Hawai'i System Office of Research Services: Ho'okumu Ulu Lā'au 'Ōiwi o Auwahi Community-Driven Restoration of a Wahi Pana Forest

University of Hawai'i System Office of Research Services: Look and Listen, Using Social Marketing to Stop the Ant

KAUA'I

National Tropical Botanical Garden:
E Mau ana Ka 'Ōhi'a, Perpetuating 'Ōhi'a
Hui o Laka, The Kōke'e Natural History Museum:
Kōke'e State Park Entrance Corridor Project
Kumano I Ke Ala O Makaweli:
Mālama Waimea River

ISLAND OF HAWAII'

Nā Mamo O Kāwā: Kāwā Dry Forest and Coastal Rehabilitation
Waikoloa Dry Forest Initiative:
Learn, Plant, Grow
The Marine Mammal Center:
Hawaiian Monk Seal Conservation, Education and Outreach Program
Department of Land and Natural Resources, Division of Forestry and Wildlife:
Slow the Spread, Spread the Word, Rapid 'Ōhi'a Death Outreach
University of Hawai'i System Office of Research Services: Right in My Backyard: Plant Pono Communities for Hawai'i Island

STATEWIDE

Kupu: Hawai'i Youth Conservation Corps (Island of Hawai'i, Kaua'i, Maui, Moloka'i, O'ahu)

O'AHU

Hawaiian Mission Houses Historic Site and Archives: History Theatre
Hawai'i LGBT Legacy Foundation: Honolulu Pride Parade, Festival and LGBT Youth Education
Hawai'i Alliance for Arts Education:
POW!WOW! 2018
Hawai'i Book and Music Festival:
Hawai'i Book and Music Festival 2018
'Ukulele Festival Hawai'i: 48th Annual 'Ukulele Festival Hawai'i
Hawai'i Symphony Orchestra: Hawai'i Symphony Orchestra in Waikīkī
Honolulu Gay and Lesbian Cultural Foundation:
Honolulu Rainbow Film Festival
Kī hō'alu Foundation Inc.: 36th Annual Hawaiian Slack Key Guitar Festival "Waikīkī Style"
Hawai'i Forest Industry Association: Hawai'i's Woodshow, Na Lā 'au o Hawai'i 2018
Honolulu Ekiden Foundation: Honolulu Ekiden and Music 2018
Pacific Rim Concepts LLC: World Oceans Day Celebration at Ko Olina 2018

Na Wāhine o Ke Kai:
Moloka'i to O'ahu Canoe Race
Pu'uhonua Society: CONTACT 2018
O'ahu Resource Conservation and Development
Council: Parade of Farms, Nalo Style
City and County of Honolulu, Department
of Parks and Recreation: 91st Annual
Lei Day Celebration
City and County of Honolulu Mayor's Office of
Culture and the Arts: Mango Jam Honolulu

MAUI COUNTY

Lahaina Restoration Foundation:
Four Chinese Events
Maui Pops Orchestra Inc.:
Maui Pops Orchestra 2018 Concerts
Hui No'eau Visual Arts Center:
Hui No'eau Exhibitions 2018
Valley Isle Road Runners:
Maui Marathon and Half Marathon
Maui Arts and Cultural Center:
Visual Arts Exhibition Program
Maui Arts and Cultural Center:
Maui 'Ukulele Festival
Lahaina Arts Society: Art in the Park, Celebrating
2018 International Year of the Reef
Hale Hō'ike'ike at the Bailey House:
E Pūlama Mau lā Maui
Hāna Arts: Hāna Arts Presents! A Workshops
and Events Program for East Maui
Japanese Cultural Society of Maui: Maui
Matsuri, A Japanese Festival (18th Anniversary)
Hawaiian Canoe Club:
The Pailolo Challenge 2018
Arts Education for Children Group: 10th Annual
Maui Hawaiian Steel Guitar Festival
Kī hō'alu Foundation Inc.: 27th Annual
Hawaiian Slack Key Guitar Festival "Maui Style"
Arts Education for Children Group: Jazz Maui,
East Meets West Festival and First Sunday
Concert Series 2018
Maui Classical Music Festival:
Maui Classical Music Festival 2018
Hawai'i Bicycling League: Second Annual
Love the West Maui Greenway Day
Pailolo SUP Sports LLC: Maui SUP Cup Poi Bowl
Race 2018
Maui Nui Botanical Gardens Inc.:
Lā 'Ulu Breadfruit Day
Stand-Up Paddle Association of Moloka'i:
Moloka'i Holokai
Maui Chamber Orchestra: Musicals in Concert,
Crazy For You

KAUA'I

Mālie Foundation: Hawaiian Cultural Events
and Kaua'i Mokihana Festival 2018
Kōke'e Natural History Museum: Eō E Emalani
I Alaka'i Festival 2018

Friends of the Festival of Lights:
Festival of Lights
Po'ipū Beach Foundation:
Po'ipū Food and Wine Festival
Po'ipū Beach Foundation: New Year's Eve
Celebration at Po'ipū Beach Park
Lāwai International Center:
Cultural Awareness Events 2018
Kī hō'alu Foundation Inc.: 26th Annual
Hawaiian Slack Key Guitar Festival "Kaua'i Style"
Hanapēpē Economic Alliance:
2018 Kaua'i Chocolate and Coffee Festival
The Storybook Theatre of Hawai'i:
Princess Ka'iulani Keiki Fest 2018
Hanapēpē Economic Alliance:
Flavors of Hanapēpē
Kaua'i Veterans Council:
Kaua'i Veterans Day Parade 2018
The Storybook Theatre of Hawai'i:
Hanapēpē Walk and Talk Story Tour
Ka 'Imi Na'auao O Hawai'i Nei Institute:
Heiva I Kaua'i 2018
Kaua'i Soto Zen Temple Zenshuji:
Soto Zen Bon Festival
Garden Island Arts Council: E Kanikapila Kākou
2018, A Legacy of Music
Kaua'i Museum Association Ltd. :
Kaua'i Museum May Day Lei Contest

ISLAND OF HAWAII

Kalani Honua Inc.: Hawai'i Yoga Festival 2018
Volcano Art Center: Hula Arts at Kīlauea
Kona Historical Society: Hands on History at the
Kona Coffee Living History Farm
The Kahilu Theatre Foundation:
Kahilu Theatre 2018 Season
Hawai'i Institute for Music Enrichment and
Learning Experiences: Steel Guitar Festivals
(Island of Hawai'i, Kaua'i)
Hawai'i Island Festival of Birds:
Third Annual Hawai'i Island Festival of Birds
HawaiiCon: HawaiiCon 2018
Big Island Resource Conservation and
Development Council: Ka'ū Coffee Festival
Hawaiian International Billfish Association:
59th Hawaiian International Billfish Tournament
Hawai'i Performing Arts Festival LLC:
Hawai'i Performing Arts Festival 2018
Hāmākua Harvest Inc.: Third Annual Farm
Festival at Hāmākua Harvest

STATEWIDE

'Ohina LLC: 'Ohina Short Film Showcase (O'ahu,
Island of Hawai'i, Lāna'i, Moloka'i)
travel2change: Voluntourism and Natural
Tourism (O'ahu, Maui, Kaua'i)
Kumu Kahua Theatre: Living Room, Wild Birds
and Dead of Night

O'AHU

Honolulu Biennial Foundation
Moloka'i 2 O'ahu Paddleboard World
Championships
Sunset Beach Pro

MAUI COUNTY

Celebration of the Arts

KAUA'I

2018 Waimea Town Celebration:
Heritage of Aloha Festival

ISLAND OF HAWAII

26th Annual Pana'ewa Stampede Rodeo

STATEWIDE

Maoli Arts Movement (O'ahu and Maui)

NATURAL RESOURCES ADVISORY GROUP

Annette Ka'ohelau'i
Hawai'i Ecotourism Association
Mark Fox
The Nature Conservancy of Hawai'i
Marti Townsend
Sierra Club of Hawai'i
T. 'Aulani Wilhelm
Conservation International
Vincent Shigekuni
PBR Hawai'i and Associates Inc.
Tanya Rubenstein
*Hawai'i State Department of Land and Natural
Resources, Division of Forestry and Wildlife*

HAWAII CULTURAL PROGRAM ADVISORY COUNCIL

Cheryl Ka'uhane-Lupenui
The Kohala Center
Debbie Nākanelua-Richards
Hawaiian Airlines
Kainoa Daines
O'ahu Visitors Bureau
Leona Māpuana Kalima
Office of Hawaiian Affairs
Nā'ālehu Anthony
Palikū Documentary Films

PROGRAM/PROJECT CONTRACT LISTING

CONTRACTS OVER \$1 MILLION FOR THE LIFE OF THE CONTRACT

Hawai'i Convention Center – CON 14002:
AEG Management HCC LLC

2014-2018 Data collection and preparation for Visitor Departure Surveys –
CON 14018: OmniTrak Research and Marketing Group Inc.

2015-2018 Statewide Domestic In-Flight Visitors' Basic Characteristics
Survey – CON 15011: SMS Research and Marketing Services Inc.

PGA Tour – CON 15020: PGA Tour Inc.

IRONMAN World Championship – CON 15061:
World Triathlon Corporation

Korea MMA – CON 16022: AVIAREPS Marketing Garden Holdings Ltd.

Europe MMA – CON 16023: Hills Balfour Limited

Oceania MMA – CON 16024: The Walshe Group Pty Ltd.

China MMA – CON 16039: The Happy Traveller LLC

GoHawaii redesign – CON 16057: Miles Partnership LLLP

HVCB supplemental services – CON 16071:
Hawai'i Visitors and Convention Bureau

Island Chapter staffing and administrative services – CON 17002:
Hawai'i Visitors and Convention Bureau

Canada MMA – CON 17017: VoX International Inc.

Japan MMA – CON 17028: a.Link LLC

USA MMA – CON 17029: Hawai'i Visitors and Convention Bureau

PROCUREMENT OVER \$100,000 FOR CALENDAR YEAR 2018

Hawai'i Convention Center – CON 14002:
AEG Management HCC LLC

2014-2018 Data collection and preparation for Visitor Departure Surveys –
CON 14018: OmniTrak Research and Marketing Group Inc.

2015-2018 Statewide Domestic In-Flight Visitors' Basic Characteristics
Survey – CON 15011: SMS Research and Marketing Services Inc.

PGA Tour – CON 15020: PGA Tour Inc.

IRONMAN World Championship – CON 15061:
World Triathlon Corporation

Cruise Development Consultant – CON 16011: Access Cruise Inc.

Taiwan MMA – CON 16016: JWI Marketing Co. Ltd.

Korea MMA – CON 16022: AVIAREPS Marketing Garden Holdings Ltd.

Europe MMA – CON 16023: Hills Balfour Limited

Oceania MMA – CON 16024: The Walshe Group Pty Ltd.

China MMA – CON 16039: The Happy Traveller LLC

GoHawaii redesign – CON 16057: Miles Partnership LLLP

HVCB supplemental services – CON 16071:
Hawai'i Visitors and Convention Bureau

Island Chapter support services – CON 17002:
Hawai'i Visitors and Convention Bureau

Canada MMA – CON 17017: VoX International Inc.

Global Social Media Program – CON 17023: Wahine Media

Japan MMA – CON 17028: a.link LLC

USA MMA – CON 17029: Hawai'i Visitors and Convention Bureau

Visitor Assistance Program - O'ahu 2018 – CON 17031:
Visitor Aloha Society of Hawai'i

Visitor Assistance Program - Island of Hawai'i 2018 – CON 17032:
Visitor Aloha Society of Hawai'i Island

Public relations, communications and outreach – CON 17036:
Anthology Marketing Group Inc.

Honolulu Festival – CON 17054: Signature - Honolulu Festival

39th Annual Pan Pacific Festival – CON 17055:
Kintetsu International Express (USA) Inc.

Executive production of 2018 Global Tourism Summit –
CON 17061: Paragon Events Inc.

Hawai'i Food and Wine Festival 2018 – CON 17068:
Hawai'i Ag and Culinary Alliance

Aloha Festivals 2018 – CON 17191:
Aloha Week Hawai'i Inc.

Junior Lifeguard Program – CON 17208:
North Shore Lifeguard Association

Design and maintenance of HTA website: Phase II – CON 17214:
Anthology Marketing Group Inc.

AirAsia X Discover Hawai'i Campaign – CON 17222: AirAsia X Berhad

University of Hawai'i Kapi'olani Community College Customer Service
and Tour Guide Certification – CON MOA 17227: University of Hawai'i
System Office of Research Services

Ala Wai Watershed Partnership 2017 – CON 17233:
O'ahu Economic Development Board

Hawaii Open Tennis – CON 18001: Pro Tennis Group LLC

Polynesian Football Hall of Fame 2018 – CON 18004:
Polynesian Football Hall of Fame

PowerShares Series Hawai'i – CON 18008:
InsideOut Sports and Entertainment LLC

World Surf League 2017-2018 – CON 18010:
Association of Surfing Professionals LLC

Season promotional efforts 2017-2018 – CON 18136: LA Clippers LLC

Visitors' Satisfaction and Activity Survey CY 2018-2020 – CON 18138:
Anthology Marketing Group Inc.

Singapore-Kuala Lumpur-Honolulu Route Service Incentive Program –
CON 18139: Scoot Tigerair Pte. Ltd.

(continued on next page)

PROCUREMENT OVER \$100,000 FOR CALENDAR YEAR 2018 (continued from previous page)

Pacific Rim Cup 2018 – CON 18140: Blue United Corporation

Kāhea Program - Airport Greetings – CON MOA 18144:

Department of Transportation Airports Division

Mālama Hawai'i – CON MOA 18145:

Department of Land and Natural Resources

Kūhiō Beach Hula and Torch Lighting (RAHCI) – CON 18153:

Waikī Improvement Association

Mele Mei 2018 – CON 18165: Hawai'i Academy of Recording Arts

2018 Global Tourism Summit reimbursables – CON 18167:

Paragon Events Inc.

Experiences of Hawai'i Post-Arrival Marketing Campaign – CON 18170:

Milici Valenti Ng Pack Inc. MVNP

Global MCI public relations – CON 18171:

Anthology Marketing Group Inc.

Social enterprise capacity building – CON 18172:

Hawai'i Investment Ready

2018 Lotte Championship LPGA Tournament – CON 18174:

Ladies Professional Golf Association

Hawaiian Airlines New Zealand Co-Op Agreement – CON 18175:
Hawaiian Airlines Inc.

Association of Volleyball Professionals 2018 – CON 18180:
EAS Enterprises LLC

38th Annual Hawai'i International Film Festival 2018 – CON 18182:
Hawai'i International Film Festival

Kaua'i Flood Relief Shuttle – CON 18184: HCR Associates LLC

Hawai'i Bowl and Hawaiian Airlines Diamond Head Classic – CON 18186:
ESPN Productions Inc.

Evaluation of 2018-2019 festivals and events – CON 18187:
YouGov America Inc.

Ocean safety video placement in Maui, Kaua'i, Island of Hawai'i airports –
CON 18189: Pacific Radio Group Inc.

Ho'okaulike Hawai'i County – CON MOA 18194: County of Hawai'i

Ho'okaulike Kaua'i County – CON MOA 18196: County of Kaua'i

Cultural Advocacy and Educational Support 2018 – CON 18200:
Native Hawaiian Hospitality Association

THE HTA TEAM SUPPORTING HAWAII'S TOURISM INDUSTRY

Chris Tatum

President and Chief Executive Officer

Keith Regan

Chief Administrative Officer

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HAWAII TOURISM

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