



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

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

**PŌ'AHĀ, 15 IUNE 2023, 9:30 AM
THURSDAY, JUNE 15, 2023 AT 9:30 AM**

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

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

E ho'olele 'iwa'ia ka hālāwai ma o ka Zoom. Meeting will be live streaming via Zoom.
<https://us06web.zoom.us/j/82749900062>

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

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

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

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

E ho'ohui 'ia nā palapala hō'ike mana'o i hiki ma ka pū'olo hālāwai. No nā palapala hō'ike mana'o i hō'ea mai ma hope o ka pa'a o ka pū'olo hālāwai (he 48 hola ma mua o ka hālāwai), e kāka'ahi 'ia nā kope i ka papa alaka'i a e mākaukau no ka 'ike 'ia e ke anaina ma ka hālāwai. E leka uila 'ia nā palapala iā Carole Hagihara-Loo ma carole@gohta.net, a i 'ole, e lawe kino 'ia i ke ke'ena.

Written testimony received ahead of the preparation of the board packet will be included in the board packet. Written testimony received after the issuance of the board packet (48 hours ahead of the meeting) will be distributed to the board and available for public inspection at the meeting. Email written testimony to Carole Hagihara-Loo at carole@gohta.net or hand-delivered to the HTA office.

Papa Kumumana'o
AGENDA

1. *Ho'omaka*
Call to Order
2. *Kikolā*
Roll Call to Announce Name of Participating Board Members and to Identify Who Else is Present with Board Member if Location is Nonpublic
3. *Wehena*
Opening Cultural Protocol
4. *'Āpono Mo'olelo Hālāwai*
Approval of Minutes of the May 9, 2023 Special Board Meeting
5. *Hō'ike A Ka Luna Kū'ai Moku'āina*
Update by State Chief Procurement Officer, Bonnie Kahakui, on HTA's Procurements for RFP 23-02 (Canada Brand Management & Marketing), RFP 23-03 (US Brand Management & Marketing), and RFP 23-08 (Support Services for Destination Stewardship)
6. *Hō'ike'ike, Kūkā, A Ho'oholo No Nā Hana Kāko'o Mālama 'Āina Ho'okipa*
Presentation, Discussion and/or Action on the Hawaiian Islands Stewardship Activities Under the Support Services for Destination Stewardship Contract for the Initial Contract Period 2023-2024
7. *Hō'ike'ike, Kūkā, A Ho'oholo No Nā Hana A Hawai'i Tourism United States*
Presentation, Discussion and/or Action on Hawai'i Tourism United States' Activities Under the Brand Management & Marketing Services Contract and HTA's 2023-2024 Brand Marketing Plans for the United States Market
8. *Hō'ike'ike, Kūkā, A Ho'oholo No Nā Hana A Hawai'i Tourism Canada*
Presentation, Discussion and/or Action on Hawai'i Tourism Canada's Activities Under the Brand Management & Marketing Services Contract and HTA's 2023-2024 Brand Marketing Plans for the Canada Market
9. *Hō'ike'ike, Kūkā, A Ho'oholo No Ke Noi Makahiki Kālā 2024*
Presentation, Discussion and/or Action on an Update on HTA's FY24 Funding Request
10. *Hō'ike'ike, Kūkā, A Hana No Ka Pelekikena A Luna Ho'okele****
Presentation, Discussion and/or Action Regarding President & Chief Executive Officer John De Fries***
11. *Ho'oku'u*
Adjournment

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

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

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

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

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

If you need an auxiliary aid/service or other accommodation due to a disability, contact Carole Hagihara-Loo at (808) 973-2289 or carole@gohta.net as soon as possible, preferably no later than 3 days prior to the meeting. If a response is received the day before the meeting, we will try to obtain the auxiliary aid/service or accommodation, but we cannot guarantee that the request will be fulfilled. Upon request, this notice is available in alternative formats such as large print, Braille, or electronic copy.

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

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

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**Approval of Minutes of the
May 9, 2023 Special Board Meeting**



Ke'ena Kuleana Ho'opipa O Hawai'i
Hawai'i Convention Center
1801 Kalākaua Avenue, Honolulu, Hawai'i 96815
kelepona tel 808 973 2255
kelepa'i fax 808 973 2253
kahua pa'a web hawaii tourism authority.org

Josh Green, M.D.
Kia'aina Governor

John De Fries
Pelekikena & Luna Ho'okele
President and Chief Executive Officer

**SPECIAL BOARD MEETING
HAWAII TOURISM AUTHORITY
Tuesday, May 9, 2023, at 9:30 a.m.**

Hybrid In-Person & Virtual Meeting

MINUTES OF SPECIAL BOARD MEETING

MEMBERS PRESENT:

George Kam (Chair), Mike White (Vice-Chair), David Arakawa, Dylan Ching (Zoom), Keone Downing, Mahina Duarte, Stephanie Iona, James McCully, Sherry Menor-McNamara, Ben Rafter, Sig Zane (Zoom)

MEMBER NOT PRESENT:

Kimberly Agas

HTA STAFF PRESENT:

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

GUESTS:

Laci Goshi, Jennifer Chun, Erin Khan, Nathan Kam, Patrick Dugan, Kylie Butts, John Monahan, Jeffrey Eslinger, Lei-Ann Field, Kara Imai, Sterling Wong, Teri Orton, Mari Tait, Brian Dunkel, Andrew Gomes, Daryl Huff, Jessica Lani Rich, Bobbie Okamoto

LEGAL COUNSEL:

John Cole

1. Call to Order

Chair Kam called the meeting to order at 9:30 a.m.

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

Mr. Gionson did the roll call, and all members were confirmed in attendance except for Ms. Agas, who was excused. Members who attended via Zoom were by themselves.

3. Opening Cultural Protocol

Mr. Casson-Fisher did the opening cultural protocol, a mele written by Edith Kanaka'ole "E Hō Mai."

Chair Kam said agenda item 4 – Report of the legislative permitted interaction group on the 2023 legislative session – would be postponed to the May 25th regular Board meeting. Chair Kam asked for a motion to change the meeting agenda. Mr. McCully made the motion, and Mr. White seconded. Chair Gionson did a roll call, and the motion passed unanimously.

Chair Kam asked for a motion to go into Executive Session to discuss the personnel and budgets. Mr. White made the motion, and Mr. McCully seconded. Chair Gionson did a roll call, and the motion passed unanimously. The people attending the Executive Sessions were all the Board members and Mr. De Fries only. All other HTA staff members and the public are excused from the meeting room.

[Executive Session]

4. Report of the Legislative Permitted Interaction Group on the 2023 Legislative Session

Mr. Cole said that in the Executive Session, they had some follow-up on personnel issues, some of which were addressed in the March 30 BOD meeting. They also discussed budget matters in the current situation with the legislation budget bill and processes they made need to go through for budgeting purposes.

5. Discussion and/or Action Regarding the HTA FY 2023 and FY 2024 Budget***

Mr. Nāho'opi'i said there was no follow-up action for that item.

6. Update on RFP 23-03 US Brand Management and Marketing***

Mr. Ka'anā'anā said they issued addendum 6 to RFP 23-03, which extended the notice of award to May 22. Mr. Nāho'opi'i said the staff is requesting a motion to approve RFP 23-03 funding at the base amount stated in the RFP. Mr. White made a motion, and Ms. Duarte seconded. Mr. Arakawa asked if the amounts were approved prior, and if the contracts said they were subject to funding, and Mr. Nāho'opi'i confirmed this. Mr. Gionson did the roll call, and the motion passed unanimously.

7. Update on RFP 23-08 Destination Stewardship***

Ms. Anderson reported that the staff issued addendum number 3, extending the RFP notice of the award to May 22. Mr. Nāho'opi'i said the staff would like to request a motion to approve RFP 23-08 destination stewardship funding at the base amount stated in the RFP. Mr. White made a motion, and Mr. McCully seconded. Mr. Arakawa asked if the amounts were previously approved, and he wanted to clarify that all the contracts were subject to funding. Mr. Nāho'opi'i confirmed that as correct. Mr. Gionson did the roll call, and the motion passed unanimously.

8. Update of Any Other Active or Planned Solicitations in FY 2023***

Mr. Ka'anā'anā said the RFP 23-02 for the Canada MMA, addendum 2 was also issued, extending the notice of award date to May 22. There were no questions. Mr. Nāho'opi'i said the staff requested a motion to approve RFP 23-02 funding at the base amount stated in the RFP.

Mr. White made a motion, and Mr. Ching seconded. Mr. Arakawa asked if the amounts were previously approved and wanted to clarify that all the contracts were subject to funding. Mr. Nāho'opi'i confirmed that as correct.

Mr. Gionson did the roll call, and the motion passed unanimously. Chair Kam said there was testimony from Ms. Lani Rich, on behalf of VASH (Visitor Aloha Society of Hawai'i). VASH helps visitors in crisis. Since the Board was addressing the tourism budget, she said the VASH budget was cut, and she asked the Board if they could restore it to the original budget as it was for the last couple of years. The reason is that Hawai'i is about culture; part of that culture is love and kindness. Love and kindness also extend when visitors come to Hawai'i. She said Dr. Tarlow, a tourism expert, praised Hawai'i and the HTA because internationally, Hawai'i is the only state with a modern program that takes care of their tourists when something happens or if they suffer a loss. Hawai'i is internationally renowned for this. She mentioned a few incidents where VASH helped make a difference. She shared a testimony of one of their visitors whose wife was assaulted. She said they take a negative situation and give their aloha and love. Ms. Lani Rich played the video testimony from the husband. She also showed some newspaper clippings, including the article titled, "Visitor Society comforts family of hiking victim." She elaborated on the article. She said they will continue to take care of their visitors. She closed off by inviting everyone in the room to join her when she helped the next visitor. She said she would not abandon the visitors.

Mr. White thanked VASH as he said they had been amazing at helping visitors, etc. He said the surviving spouse or family of the victims always leave feeling loved and all their needs are taken care of. He thanked Ms. Lani Rich. Chair Kam thanked Ms. Lani Rich as well.

9. Discussion and Action on the Creation of a Governance Study Permitted Interactive Group for the Purpose of Developing the Governance, Strategic Organization, and Business Review Process Study

Mr. Nāho'opi'i said that at the previous meeting in April, the Board approved a motion to have the staff move forward with a governance strategic organization design and business process review study. The staff recommends that the Board form a permitted interaction group to assist in developing a plan of action for the study. The group will allow selecting Board members to meet to discuss the governance study outside sunshine requirements. They can also talk to others outside the Board to gather information. They will then present back to the Board their findings. At the third meeting, the Board can take additional action: the presentation of the RFP or the scope of work for the RFP, which the Board can then approve.

Mr. Arakawa said that for the proposed deliverables, Mr. Nāho'opi'i could consider identifying other government agencies, such as sister state agencies, federal and county agencies that the HTA needs to work with, so the destination management and branding efforts can benefit from working with the government agencies. He said they should also identify stakeholders in the industry and get their input. He said they could also have a standing agenda item where the departments can give presentations related to what they are doing for tourism. He said DOT and DLNR were a part of the HTA Board at one time. The last session, DBEDT also became part of the HTA Board. He asked Chair Kam to extend an invitation to the various departments that the HTA works with.

Mr. Nāho'opi'i said the staff requested a motion to create a governance study permitted interaction group. Chair Kam made a motion, and Mr. McCully seconded. Mr. Gionson did the roll call, and the motion passed unanimously.

10. Discussion and Action on the Assignment of Board Members to the Governance Study Permitted Interactive Group. This Agenda Item is Dependent on the Approval of the Creation of the Governance Study Permitted Interaction Group.

Chair Kam said the agenda item is dependent on the approval of the creation of the governance study permitted interaction group. He recommended that they have Ms. Iona as the chair, Ms. Duarte as a vice-chair, Mr. McCully, Mr. White, Mr. Downing, and himself on the PIG. Mr. Arakawa said he would be willing to serve.

Chair Kam asked for a motion. Mr. White made a motion, and Mr. McCully seconded. Mr. Gionson did the roll call, and the motion passed unanimously.

11. Adjournment

Chair Kam made a motion to adjourn. The motion passed unanimously. Chair Kam adjourned the meeting at 12:03 p.m.

Respectfully submitted,

A handwritten signature in cursive script that reads "Sheillane Reyes".

Sheillane Reyes
Recorder

7

**Presentation, Discussion and/or Action on
Hawai'i Tourism United States' Activities Under the
Brand Management & Marketing Services Contract and
HTA's 2023-2024 Brand Marketing Plans for the
United States Market**



Brand Marketing Plan (BMP)

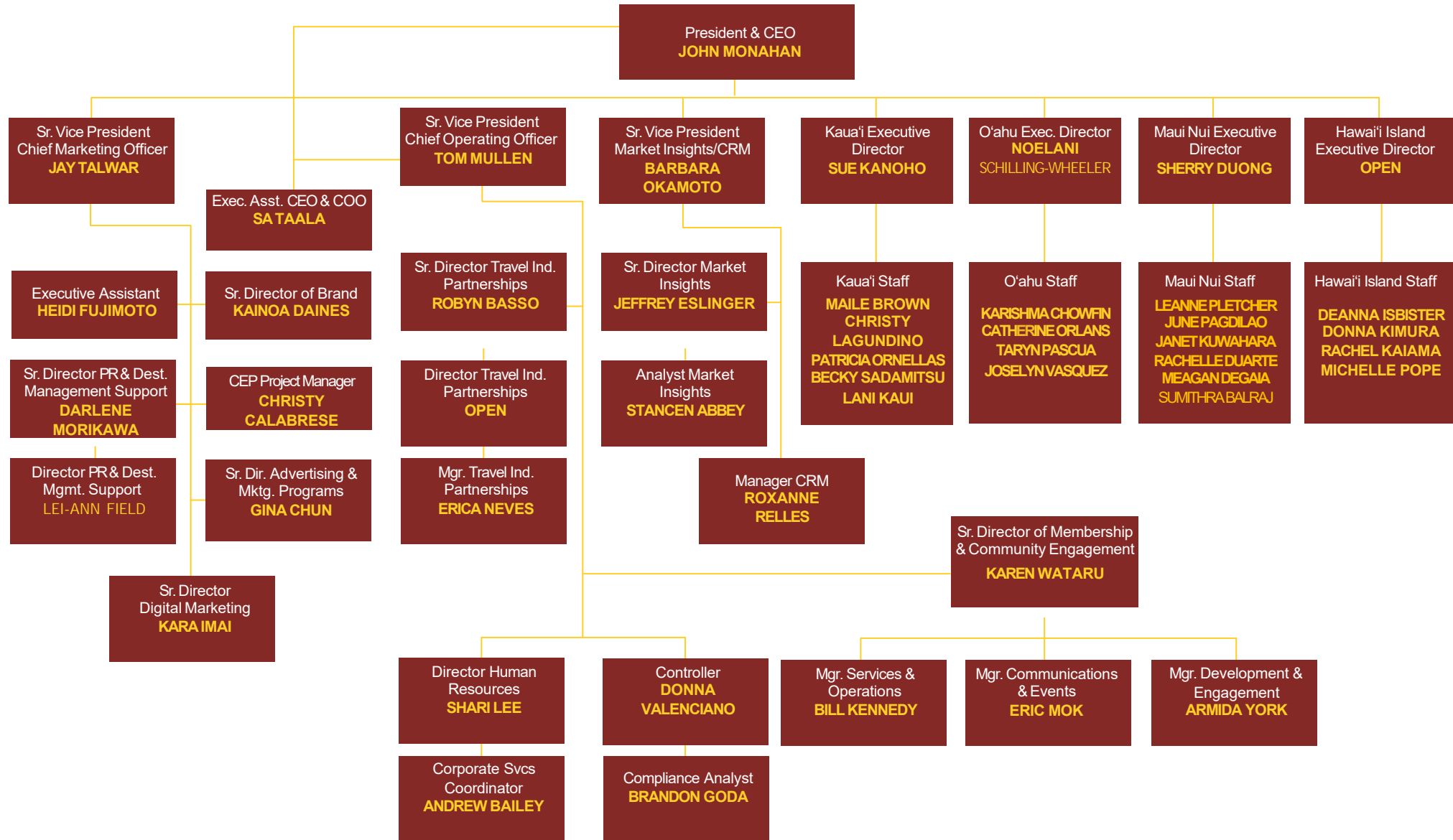
July 2023 - December 2024

6.15.2023

Jay Talwar

Chief Marketing Officer, Senior Vice President

HAWAI'I TOURISM USA TEAM

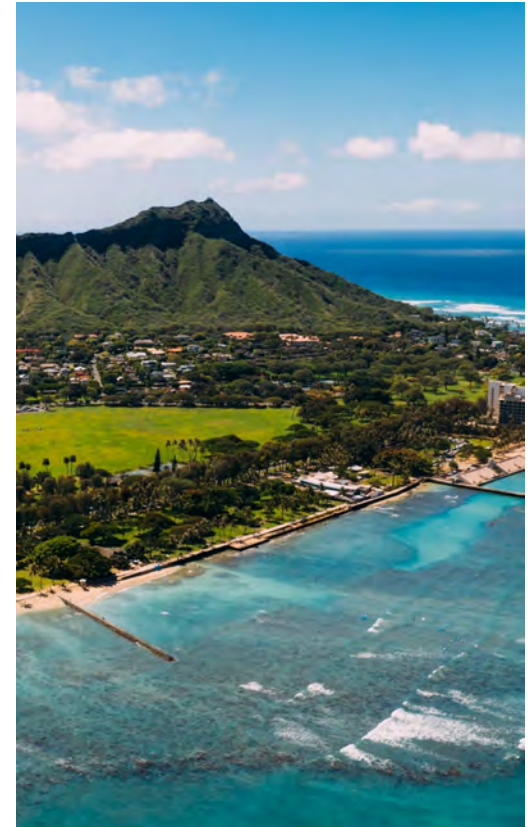


MARKET SITUATION

MARKET SITUATION

HAWAI'I FORECAST AND PERFORMANCE

- DBEDT estimates that Hawai'i's real gross domestic product (GDP) will increase by 1.8 percent in 2023. The forecast then projects 2.0 percent growth in 2024, 1.9 percent in 2025, and 1.8 percent in 2026..
- Hawai'i will welcome an estimated 9.9 million visitors in 2023, an increase of 7.2 percent from the 2022 level. Visitor arrivals are projected to increase to 10.2 million in 2024, 10.4 million in 2025, and 10.6 million in 2026. Visitor spending is estimated to increase 9.3 percent in 2023. The forecast then projects an increase of 4.3 percent in 2024, 3.5 percent in 2025, and 3.3 percent in 2026.



MARKET SITUATION

HAWAI'I FORECAST AND PERFORMANCE

ACTUAL AND FORECAST OF KEY ECONOMIC INDICATORS FOR HAWAII: 2022 TO 2026

	2021	2022 ¹	2023	2024	2025	2026
Economic Indicators	Actual		Forecast			
Total population (thousands) ²	1,447	1,440	1,439	1,439	1,441	1,443
Visitor arrivals (thousands) ³	6,778	9,248	9,914	10,179	10,398	10,561
Visitor days (thousands) ³	65,312	85,265	88,633	91,027	92,364	93,348
Visitor expenditures (million dollars) ³	13,154	19,329	21,119	22,038	22,820	23,565

MARKET SITUATION

OUTBOUND TRAVEL / TRAVEL SENTIMENT

Summer Travel Outlook in the United States is strong. (U.S. Travel Association)

- Over a quarter of Americans plan to increase the amount they are spending on leisure travel in the next three months (26%) up from 19% in Q1.
- Just over half of all Americans (53%) and 81% of leisure travelers have travel planned in the next six months.
- Six in 10 Americans (60%) agree that taking time off to travel is more important than ever— significantly higher than in Q1 (35%).
- Over half of Americans (52%) say they would travel more for leisure in the next six months if the travel experience was not as much of a hassle, significantly more than Q1 (29%)

MARKET SITUATION

U.S. TRANS-PACIFIC AIR SEAT SYNOPSIS

	# of SEATS 2019	# of SEATS 2022	# of SEATS 2023P	% Change 23/19	% Change 23/22
<u>O'ahu</u>	4,962,887	5,581,303	5,689,133	14.6%	1.9%
Maui	2,668,370	3,158,201	2,899,422	8.7%	-8.2%
Kona	1,104,675	1,312,548	1,300,989	17.8%	-0.9%
<u>Kaua'i</u>	962,986	1,147,751	997,781	3.6%	-13.1%
Hilo	47,872	47,433	1,162	-97.6%	-97.6%
Total	9,746,790	11,247,236	10,888,487	11.7%	-3.2%

Seats Reflect Capacity Only – Not Load Factor

HTUSA analysis of DiiO Mi – May 26, 2023

MARKET SITUATION

BOOKING PACE



- Q1 performed fairly well, but demand for Q2 and beyond is slowing down.
- Increase in last-minute bookings (within 2-3 months).
- Revenue is performing well due to increases in ADR, up again this year between 10-20 percent.
- Hawai'i continues to lose ground against Mexico and the Caribbean, and demand for Europe is very strong which exceeds in room nights and revenue.
- 2024 business is coming in slower than last year for Q1. Maui and O'ahu are performing better than Kaua'i and Island of Hawai'i .

MARKET SITUATION

COMPETITIVE LANDSCAPE



Tourism destinations around the globe are back marketing to U.S. travelers:

- South African Tourism's North America team's focus is on American travelers motivated by exploring new cultures, history, and beautiful scenery. They are called *Adventurous Trendsetters*, who financially prioritize making long haul, expensive trips and are willing to pay more for truly unforgettable brands and experiences.
- Discover Puerto Rico is taking a multipronged approach to promoting the island, hosting several major tourism events this year and continuing with a Live Boricua campaign that highlights Puerto Rico's unique attributes and identity. Future booking pace is up as airlines are bullish about bringing new routes to Puerto Rico.

OBJECTIVE

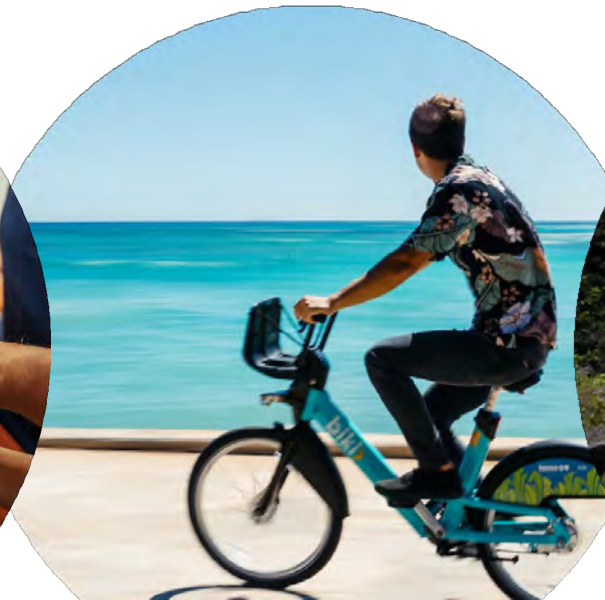
BMP UPDATE

JULY – DECEMBER 2023

Objective

To change the invitation to visit from “come, play on our islands” to an invitation that:

- Targets mindful travelers
- Educates them on the beauty of our culture
- Shapes their behavior once they visit



TARGET AUDIENCE

TARGET AUDIENCE

THE MINDFUL HAWAI'I TARGET TRAVELER



The Service-Minded

Values making a difference in the world and is likely to seek a Hawai'i experience punctuated by voluntourism.



The Culturally Curious

Has a deep interest in learning about other cultures and is likely to seek a visit to Hawai'i that immerses them in local community and cuisine.



The Eco-Conscious

Prioritizes care for the planet and is likely to seek a visit to Hawai'i that favors eco-friendly, sustainable experiences.

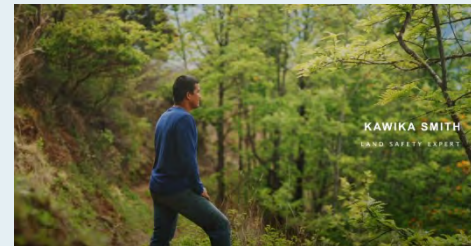


The Unobtrusive Explorer

Enjoys adventurous new experiences and is likely to seek a visit to Hawai'i centering on once-in-a-lifetime opportunities, or the great outdoors.

CORE BRANDING MESSAGE

CORE BRANDING MESSAGE



Kuleana / Travel Tips

Mālama Hawai'i

2023 BMP
JULY - DECEMBER

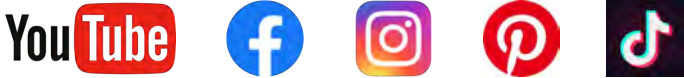
BMP UPDATE

JULY – DECEMBER 2023

Paid Media

(Considered List)

- Digital and Paid Media
- Paid Social Media



BMP UPDATE JULY – DECEMBER 2023

Social Media



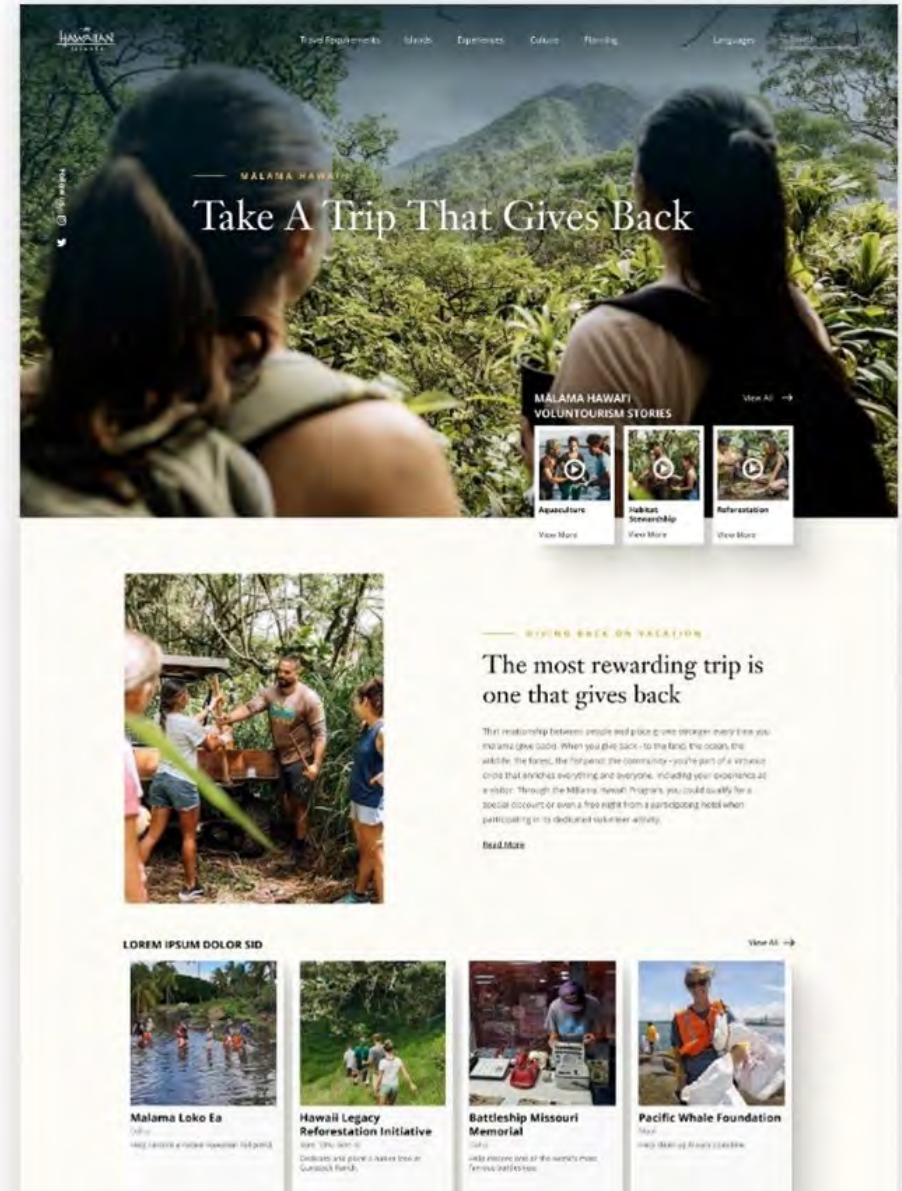
 <p>Fatohi Kanaoka'ole</p>	<p>1953</p> <p>Became a Kamehameha School graduate, the first Hawaiian to earn a Ph.D. in Education from the University of Hawaii. He served as the first Hawaiian principal of the University of Hawaii.</p>	<p>Early 1970s</p> <p>Brought a variety of foreign expertise to the state of Hawaii, including a team of geologists, biologists, and economists to study the state's natural resources.</p>	<p>1990</p> <p>The U.S. Department of the Interior established the Hawaiian Islands National Monument, the first national monument in the U.S. to be established in the Hawaiian Islands.</p>
<p>1977</p> <p>Was honored with the title of "Honorable Citizen of the State of Hawaii" by the Hawaiian Civic League.</p>	<p>1979</p> <p>Received the highest honor in Hawaii, the Order of the Hawaiian Kingdom, from the Hawaiian Civic League.</p>	<p>2023</p> <p>Received the highest honor in Hawaii, the Order of the Hawaiian Kingdom, from the Hawaiian Civic League.</p>	

<p>Celebrate the anniversary of the Hawaiian Islands and "Kamehameha Day" on June 10th. The day is celebrated with parades, performances, and more.</p> <p>CRUISE OF HAWAII</p> <p>How's your favorite cruise ship? And make the journey to the top.</p>	<p>Make a reservation to visit the Valley on the 10th of the Battle of Kamehameha I was here that King Kamehameha I won a great battle that saved Hawaii.</p> <p>KING KAMEHAMEHA I DAY</p>	<p>Check out the 11-foot statue of King Kamehameha I. Learn more about him as an ancestor to the people of the Hawaiian Islands.</p> <p>DOWNTOWN HONOLULU</p>	<p>MĀLAMA HAWAII</p>
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BMP UPDATE

Consumer Direct

- Newsletters
- Special Offers
- GoHawaii app



BMP UPDATE

JULY – DECEMBER 2023

Public Relations

- Hot 100 List
- Proactive Outreach
- U.S. Media Blitz – L.A.
- Media Hosting



≡ TRAVEL+ LEISURE SUBSCRIBE

TRAVEL TIPS > INTELLIGENT TRAVELER

How to Have a More Thoughtful Visit to Hawaii, According to Hawaiian Natives



As Hawaiians work to make tourism more enriching and more sustainable for locals and visitors alike, a T+L contributor meets the cultural ambassadors dedicated to sharing their aloha.

BMP UPDATE

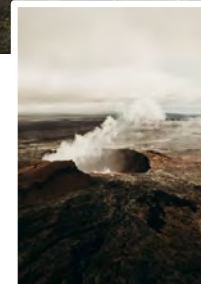
JULY – DECEMBER 2023

Travel Trade – Education

- Partnerships
 - Tourism Cares
- Wholesale, Consortia, Industry Events
- Consortia Programs
- Cooperative Programs
- Content Development
 - Educational Tools
 - agents.gohawaii.com refresh
- In-person & Virtual Education
 - HDS Multi-Island FAM
- Trade Paid Media
- Leisure Group Business



what is
Hawaiian
culture?



Hawai'i has for centuries been an archipelago filled with stories. And some of the oldest speak about the creation of this place by the Hawaiian goddess of fire, a deity best known throughout the islands today as Pele.

Fleeing long ago across the Pacific Ocean - running from a fight with her family - Pele stumbled on a chain of uninhabitable islands, made up then of nothing more than black rock at the time. Deciding one of those barren islands might be a good place to put down her own roots, Pele plunged her magic ʻōʻō, or digging stick, into that barren rock, calling up her sacred fires and lava that burned deep within the earth and giving life to the island of Kaua'i.

But while Pele settled into her new home on Kaua'i, the old stories say her sister and a goddess of the sea, Nāmakaokaha'i, also known as Nāmaka, was in close pursuit and angry about how Pele left things with her family. A ferocious battle of fire and water ensued, and Pele was eventually forced to retreat to another barren rock in the uninhabited island chain, where she again plunged her magic ʻōʻō into the black rock and made a new home on what we know today as the island of O'ahu.



Signature
 travel network

MILANI HAWAII

The Hawaiian language is a rich and vibrant part of our heritage. Through our Signature travel network, you can explore the beauty of the islands and experience the magic of the Hawaiian Islands.

Sustainable Farming with Rick Barbosa

How to Care for the Hawaiian Islands

LEARN MORE

THE HAWAIIAN



2023 JULY – DECEMBER BUDGET

Budget Category	Amount
Consumer Direct	\$4,873,970
Public Relations	\$548,380
Travel Trade	\$788,650
Research	\$50,000
Admin	\$1,639,000
Total:	\$7,900,000

2024 BMP
JANUARY - DECEMBER

Support Local Initiative

- Fashion
- Retail
- Music
- Ag Products



Brand Partnership

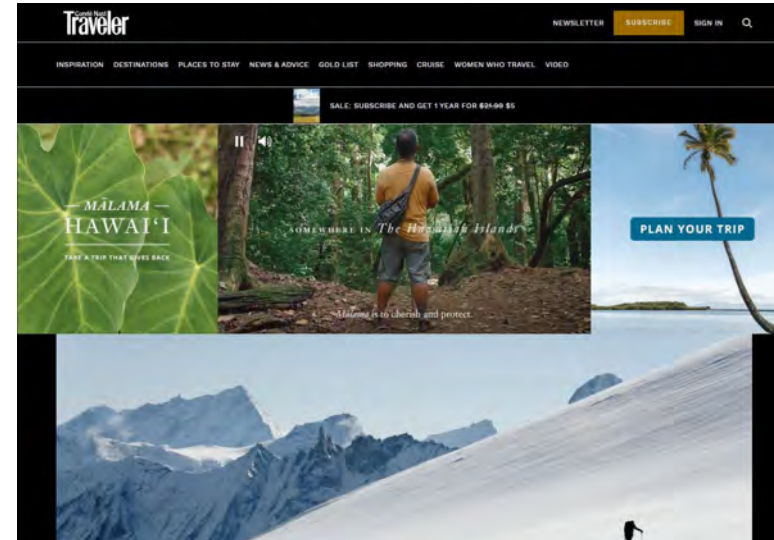
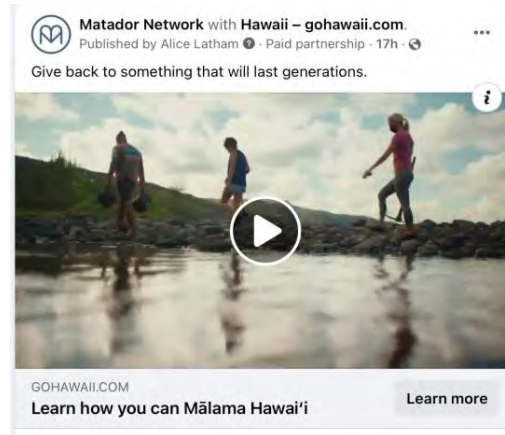


BMP UPDATE

2024

Paid Media (Considered List)

- Digital and Paid Media
- Native Programs
- Social Media

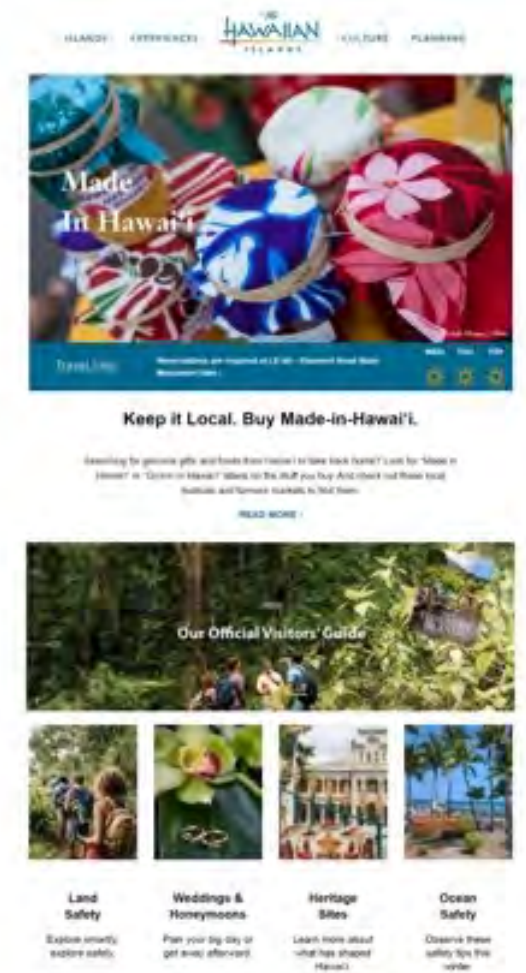
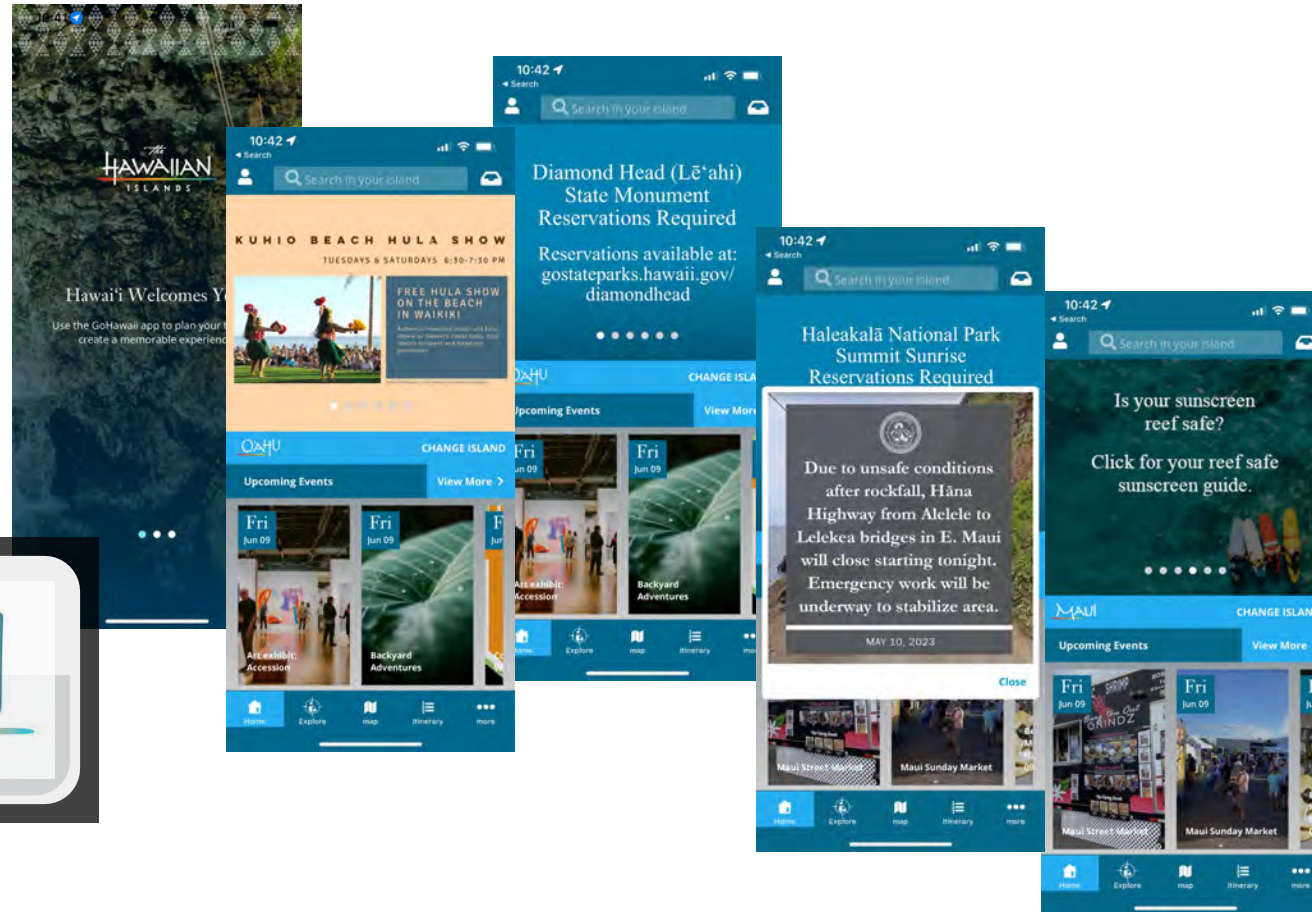


BMP UPDATE

2024

Consumer Direct

- Newsletters
- Special Offers
- GoHawaii app



BMP UPDATE

2024

Public Relations

- U.S. Media Blitz – New York
- FestPac Press Trips
- Deeper storytelling in collaboration with Kilohana



Male members of Halau Hi'iakainamakalehua practiced their hula kahiko (ancient hula) performance. They used dense, wooden sticks to amplify their chant. In the past, hula provided an opportunity for Hawaiian men to train for combat.

Preserving Hula, the Heartbeat of Hawaii

For 60 years, the Merrie Monarch Festival has contributed to the reclamation of Hawaiian culture, language and identity.

Travel Trade - Education

- Partnerships
 - Tourism Cares Meaningful FAM
- Wholesale, Consortia, Industry Events
- Consortia Programs
 - New partner: The 1000
- Cooperative Programs
- Content Development
 - HDS Training Curriculum Update
- In-person & Virtual Education
- Trade Paid Media
- Leisure Group Business



what is
mālama?

Like so many words in the Hawaiian language, *mālama* has a number of different definitions. It can mean to take care of, to attend and cherish, to preserve and protect, and even to save. *Mālama* is a word that has been used to define our *kūlewa* (responsibility) to the 'āina (land), its natural resources and each other for generations. *Mālama* is a *kūlewa* that we also share with our guests who visit our home in Hawai'i.

"It's not only about change but about healing. I think that's a big part of our work. We're healing the land, we're healing the people, we're healing ourselves."
Nicolene Lee,
Aquaculture Restoration



Help your clients discover the meaning of mālama.
agents.gohawaii.com

LEARN MORE >

HAWAIIAN
ISLANDS



Help your clients discover the meaning of mālama.
agents.gohawaii.com

LEARN MORE >

HAWAIIAN
ISLANDS

2024 JANUARY – DECEMBER BUDGET

Budget Category	Amount
Consumer Direct	\$8,644,840
Public Relations	\$1,123,600
Travel Trade	\$1,279,560
Research	\$100,000
Admin	\$3,077,000
Total:	\$14,225,000

MAHALO!

8

Presentation, Discussion and/or Action on Hawai'i
Tourism Canada's Activities Under the Brand
Management & Marketing Services Contract and HTA's
2023-2024 Brand Marketing Plans for the
Canada Market



BRAND MARKETING PLAN (BMP)

JULY 2023 - DECEMBER 2024

6.15.2023

SUSAN WEBB
PRESIDENT





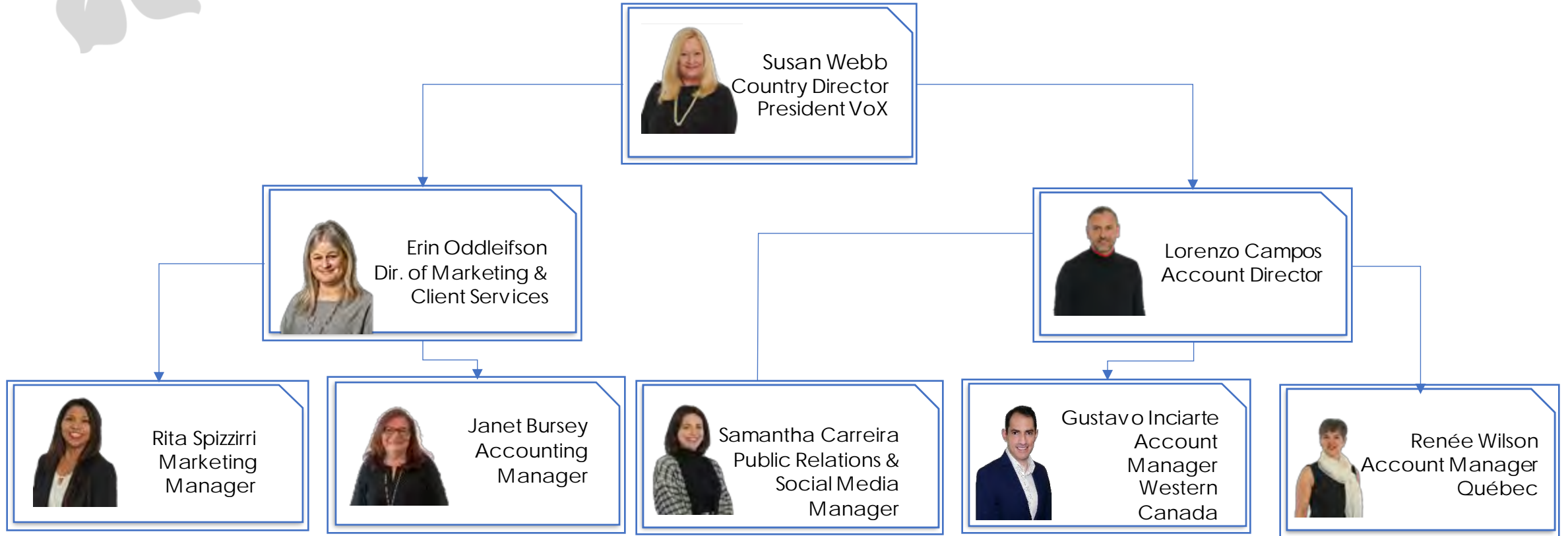
MAHALO FOR SELECTING VoX TO REPRESENT **HAWAI'I**

We know & understand...

- Hawai'i
- Partners
- Canadian tour operators
- Canadian airlines
- Canadian retail trade
- Canadian trade & consumer media
- Social media influencers



HAWAII TOURISM CANADA TEAM





HTCanada
Big Wins



MARKET SITUATION

CANADIAN MARKET SNAPSHOT

- Consumer confidence high
- Unemployment record low
- Interest rate hike
- CAD \$0.74 USD
- Now 90% of 2019 outbound travel
- 48% focus on sustainable travel
- 57% vacation deprived (Gen Z 74%)
- 72% prioritize travel
- Cultural travel important
- Wellness travel growing



OUTBOUND TRAVEL/TRAVEL SENTIMENT

Summer intentions Survey CBoC (May – October)

- 70% planning leisure trip
- 31% outbound

Trip motivators

- Vacation experience 36%
- Spending time with family/friends 34%
- Favorable weather 28%


Outbound capacity May – October 2023 vs 2019


- Asia Pacific – 34%
- Europe/UK - 2 %
- Caribbean/Mexico - 2 %
- USA - 7%
- Overall – 8%




TRAVEL ZOO MEMBER SURVEY

Our members =
your best guests

 **49%**
ages 45+,
51% ages 18-44

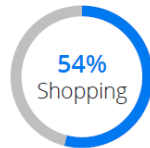
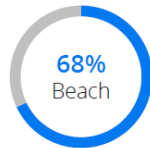
 **55%**
female, 45% male

 **99%**
have valid passport
compared to 42%
of Canadian population

 **55%**
HHI of \$100K+
compared to 32%
of Canadian population

* Google Analytics, average taken over
November 2021 to October 2022
Sources: Travelzoo Travel Outlook 2023 member
survey in Canada; survey tool Alchemer;
October 2022; random selection; n=1,574

Top 3 activities on next vacation outside of Canada



81%
are open to new destinations and travel ideas

4 in 5
are hunting for travel deals to maximize their travel budget

80%
are prioritizing leisure travel, and view this as their most
important discretionary spend

1 in 2
want to eat and shop local during their travels

50%
want to visit somewhere completely new

Source: Travelzoo Canada member survey; survey tool Alchemer; April 2023; n=1,976

Top 10 U.S. states
Canadian members
are most interested in

- 1 California
- 2 Florida
- 3 Hawaii
- 4 New York
- 5 Arizona
- 6 I am open to inspiration
- 7 Nevada
- 8 Washington
- 9 Alaska
- 10 Oregon

68%
are interested in travelling to the U.S. in the next 2 years,
14% are undecided

On their next U.S. vacation plan to stay



On their next U.S. vacation plan to stay
in paid accommodations

39% Chain hotel / boutique

24% Undecided / I'm not sure

22% Vacation rental home or time share (eg, Airbnb, VRBO)

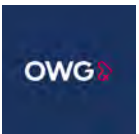
10% Own vacation home / friend or family's home

5% All-inclusive resort

AIR OVERVIEW - SEATS

Monthly Canada Seats by Island 2023						
	DepCity	STATE	HNL	OGG	KOA	LIH
Jul	Vancouver	21,266	10,633	10,633		
Aug	Vancouver	21,266	10,633	10,633		
Sep	Vancouver	18,552	10,290	8,262		
Oct	Vancouver	22,330	11,662	9,460	860	348
Nov	Calgary	5,714	1,352	4,362		
	Vancouver	49,949	20,406	18,492	8,093	2,958
	Total	55,663	21,758	22,854	8,093	2,958
Dec	Calgary	12,412	5,170	6,720	522	
	Edmonton	1,740	522	1,218		
	Toronto	3,235	2,341	894		
	Vancouver	52,360	20,744	19,004	8,262	4,350
	Total	69,747	28,777	27,836	8,784	4,350

Monthly Canada Seats by Island 2024						
	DepCity	STATE	HNL	OGG	KOA	LIH
Jan	Calgary	10,912	3962	6254	696	
	Edmonton	1,566	696	870		
	Toronto	3,576	2384	1192		
	Vancouver	52,012	21092	19004	7914	4002
	Total	68,066	28,134	27,320	8,610	4,002
Feb	Calgary	11,114	4136	6282	696	
	Edmonton	1,392	696	696		
	Toronto	3,576	3278	298		
	Vancouver	49,452	19894	19024	7054	3480
	Total	65,534	28,004	26,300	7,750	3,480
Mar	Calgary	13,748	5518	7360	870	
	Edmonton	1,740	870	870		
	Toronto	4,255	3957	298		
	Vancouver	53,404	21266	20570	7566	4002
	Total	73,147	31,611	29,098	8,436	4,002
Apr	Calgary	7,106	2918	3840	348	
	Edmonton	696	348	348		
	Toronto					
	Vancouver	44,555	19710	17622	6005	1218
	Total	52,357	22,976	21,810	6,353	1,218
May	Calgary					
	Edmonton					
	Toronto					
	Vancouver	18,731	10633	8098		
	Total	18,731	10,633	8,098		

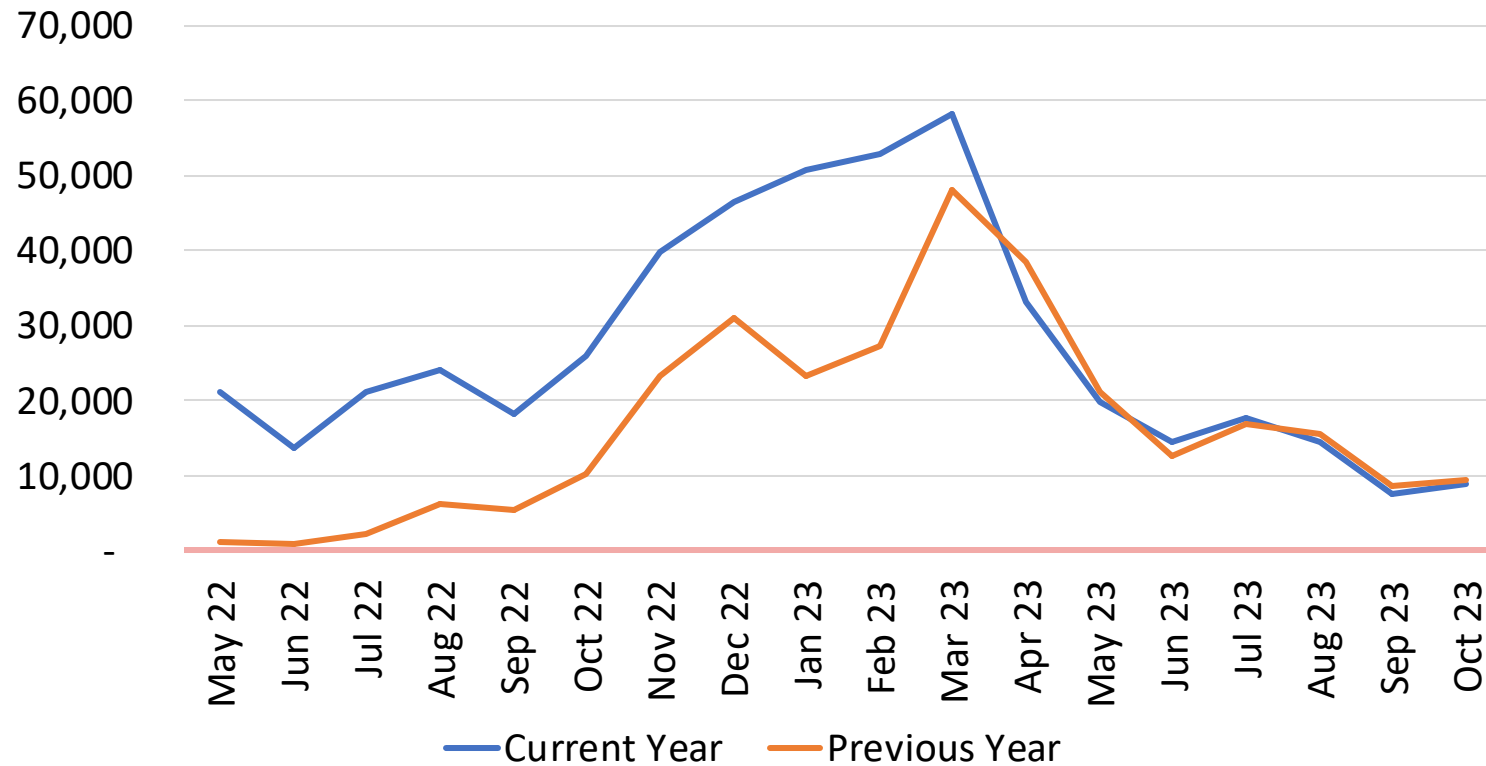


Source: DIO Airline database, data pull as of 6-8-23, subject to change.

Arrivals in **Hawai'i** & outlook from Direct and Travel Agency booking for the past 12 months and the next 6 months

BOOKING PACE

AIR BOOKING TRENDS



Source: ForwardKeys as of 5/28/2023, data subject to changes.

COMPETITIVE LANDSCAPE



All-inclusive
resorts
Caribbean
Mexico



Fiji



Australia



Europe



CHANGING MEDIA LANDSCAPE

- Newsroom shrinkage
- Titles now only digital
- Video rules
- Rise in Micro Influencers
- Blurring of paid/earned media
- Media consumption by consumers
- Travel review websites are top sources for travel planning
- Social media influencing travel decisions



TARGET AUDIENCE

TARGET AUDIENCE



Experience Seekers



Affluent Traveler



Snowbird/Retiree



Romance

Mindful Travelers

High
spending
traveler

High v
alue
traveler

Lifetime
v
alue
traveler



AVID TRAVELERS CANADA



Age range 64+
Income range
\$100k+
Most recent visited
destination Hawai'i



Age range 35-49
Income
range \$100k+
Took an
international trip in
the last 12 months



Age range 50- 64
Income range
\$150k+
Took an
international trip in
the last 12 months

Age range 35-64
Income range
\$100k
Took an
international
vacation by air in
the last 12 months



CORE BRANDING MESSAGE

CORE BRANDING MESSAGE

- Mālama is the overarching message
- Educating the visitor on the value of Aloha, Mālama, Kuleana & Ho'okipia
- Themes for the Messaging will be focused on culture, culinary, romance, wellness, outdoor adventure and family



2023 BMP JULY - DECEMBER



PR INITIATIVES 2023

- SITV Consumer Show in Montreal: November 2023
- Group Fam: early November 2023
 - Two Islands (TBD)
 - Theme: Hawai'i's Culinary Scene: From Farm to Table
- Discover America Media Day Toronto : October 26th
- Aloha Canada Media Interviews & Reception
 - Facilitate trade media and broadcast interviews in Toronto and Vancouver
 - Host media reception in Vancouver



TRAVEL TRADE INITIATIVES 2023

- Air Canada Vacations' product launches across Canada September
- TravelBrands Agent Appreciation Events in Montréal/Toronto & digital version in Fall
- WestJet Vacations Expos in Toronto, Calgary and Vancouver inviting up to 10 Hawai'i partners to work with the tour operator
- Aloha Canada – October 16-20, 2023
 - Three City: Toronto, Edmonton, Vancouver
- Hawai'i Specialist Program promotion
- Spoiled Agent
- Branch Up



ALOHA CANADA 2023

- Oct 16 – 20
- Toronto, Edmonton, Vancouver
- Hawai'i & Canadian partners
- Island Chapters
- 3 major markets and on-line
- Trade and PR
- Cultural component
- Destination Specialist Program
- Promotional tools
- Sustainable events
- Mālama, kuleana, aloha and ho'okipa emphasis



SOCIAL MEDIA 2023

- Canada dedicated channels
- Canadian content creation
- Mālama messaging
- High consumer engagement
- Tracking
- Amplified brand messaging
- Island Chapter collaboration
- Amplify earned & owned channels



DIGITAL CAMPAIGNS 2023

- Advanced TV
 - Connected TV
 - CTV retargeting
 - Linear TV extension
- Broadcast Specialty Shows
- Video Content
- Digital Magazines
- Mālama messaging





BUDGET: JUL – DEC 2023

Budget Category	Amount
Consumer Direct	\$108,000
Public Relations	\$69,000
Travel Trade	\$135,000
Research	0
Admin	\$88,000
Total	\$400,000

2024 BMP JANUARY - DECEMBER



PR INITIATIVES 2024

- TMAC Conference: Spring 2024 (exact date and location TBD)
- Group Fam: April 2024
 - Exact dates tentative
 - Two Islands (TBD)
 - Theme: Arts and Culture: Hawai'i's past and future.
- Lei Day Media Blitz: Month of May 2024
- Discover America Media Day (Fall 2024)
- Aloha Canada Media Interviews & Reception
 - Facilitate trade media and broadcast interviews in Toronto, Montreal and Vancouver
 - Host media reception in Toronto



TRAVEL TRADE INITIATIVES 2024

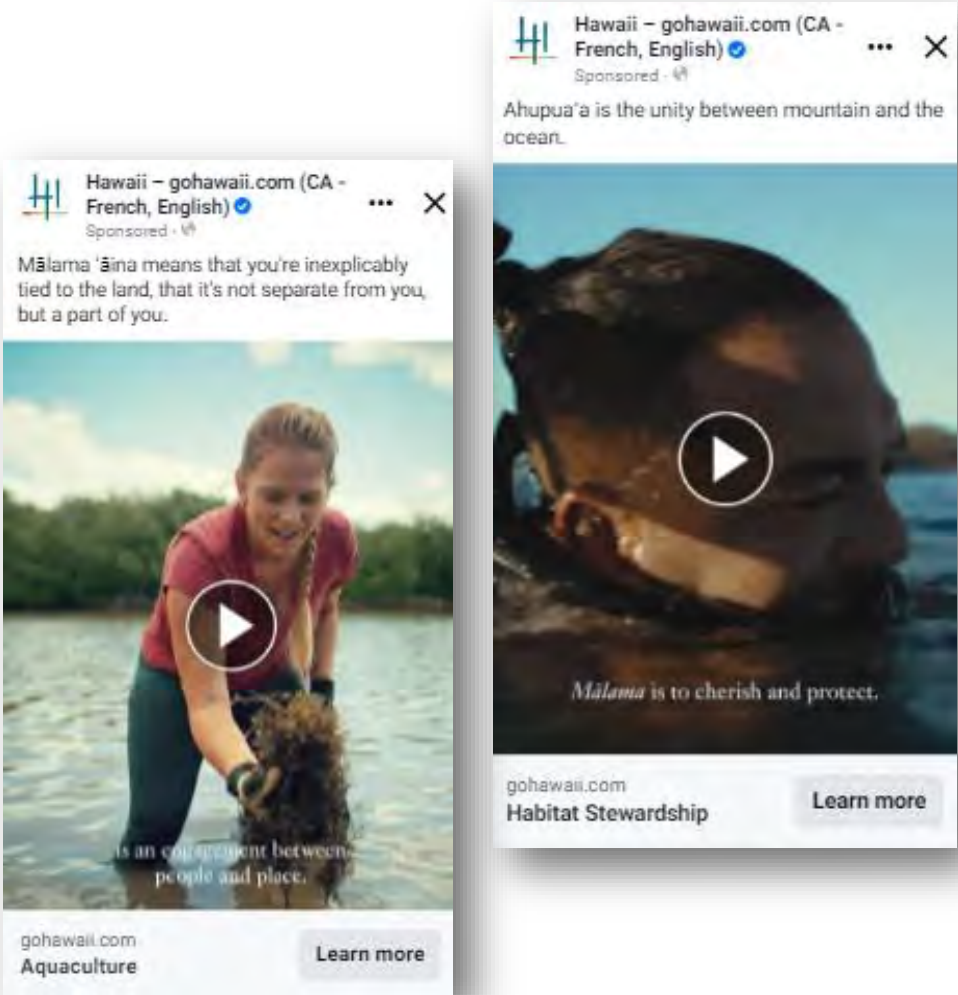
- Group fam – Spring 2024
 - Two Islands (TBD)
- Virtuoso On Tour in Montréal, Vancouver and Toronto in the Spring
- Air Canada Vacations' product launches national
- TravelBrands Agent Appreciation Events in Montréal and Toronto and its digital version in the Fall
- WestJet Vacations Expos in Toronto, Calgary and Vancouver inviting up to 10 Hawai'i partners to work with the tour operator
- Participation at IPW 2024
- Travel Trade Magazine campaign
- Ongoing webinars, training
- Integrated cooperative campaigns



SOCIAL MEDIA 2024

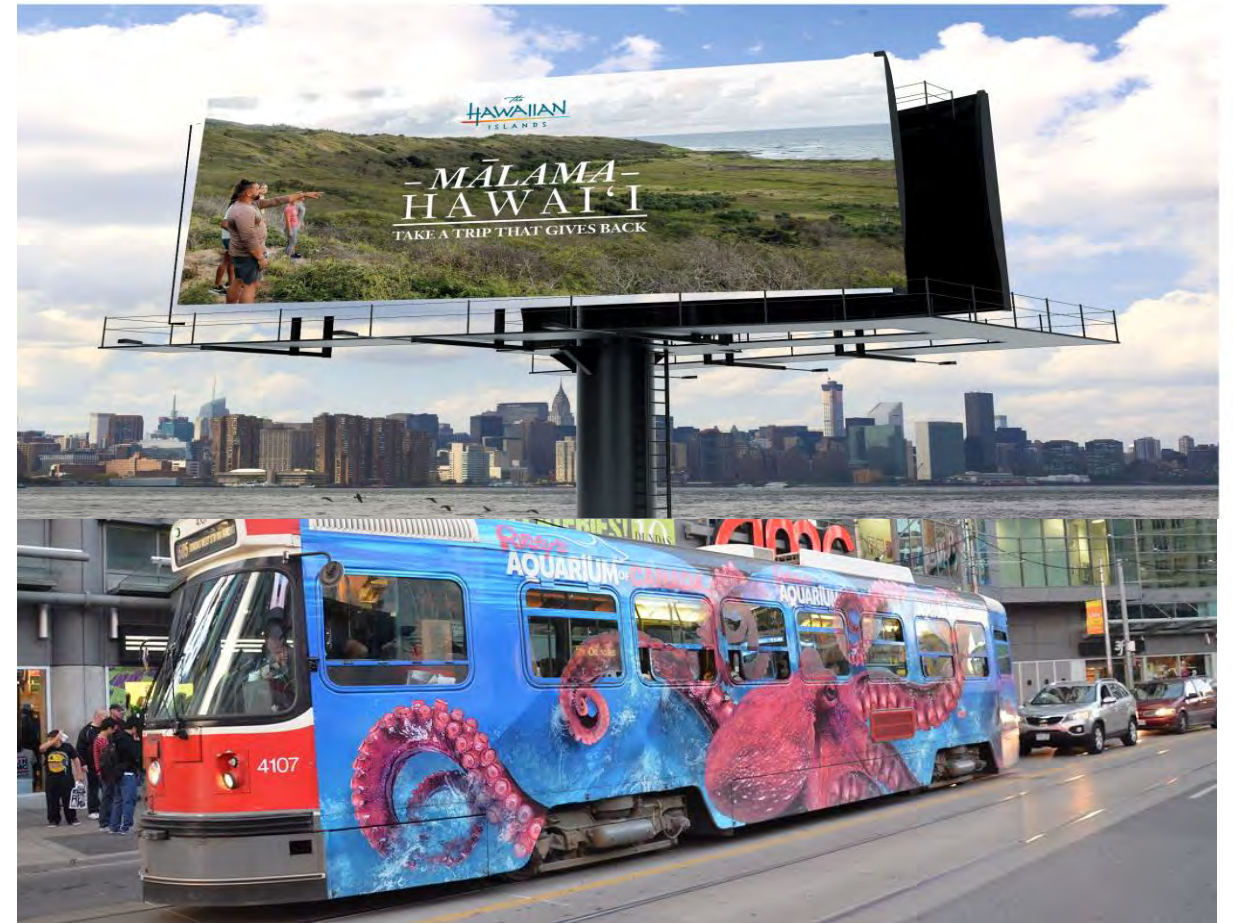
Always on strategy

- o Drive awareness and traffic to the www.gohawaii.com/ca website to educate consumers on Mālama Hawai'i / Kuleana DMAPs
- o Encourage the download of the GoHawaii app
- o All platforms will be supported (Facebook, Instagram, and Twitter)
- o A total of 3 posts per week deployed across all platforms
- o Source user-generated content based on the guidelines previously mentioned.
- o Integrate the island chapters through Instagram and Facebook lives



OUT OF HOME 2024

- Public Transit Activations & Takeovers
- Digital billboards
- Mālama messaging
- Contesting
- Social engagement
- Integrated campaigns
- Call to action
- Partnership opportunities



CIRQUE DU SOLEIL PARTNERSHIP 2024

- VIP events @ Cirque HQ Montreal
- Activations
- Branding
- Partnership opportunities
- Marketing
- PR, media and social
- Contesting





BUDGET: JAN – DEC 2024

Budget Category	Amount
Consumer Direct	\$384,000
Public Relations	\$128,000
Travel Trade	\$268,000
Research	\$0
Admin	\$220,000
Total	\$1,000,000

MAHALO!
THANK YOU
MERCI

