



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

**REGULAR MARKETING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY**

Pō'akolu, 29 Kepakemapa 2021, 2:30 p.m.
Wednesday, September 29, 2021 at 2:30 p.m.

HĀLĀWAI KIKOHO'E
VIRTUAL MEETING

Hiki i ka lehulehu ke hālāwai pū ma o ka ZOOM.
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Papa Kumumana'o – Ho'ololi 'Ia
AMENDED AGENDA

1. *Ho'omaka A Pule*
Call to Order and Pule
2. *Āpono I Ka Mo'ō'ōlelo Hālāwai*
Approval of Minutes of the September 1, 2021 Marketing Standing Committee Meeting
3. *Hō'ike A Hawai'i Tourism Japan*
Presentation by Hawai'i Tourism Japan on Brand Management Plan Amendments and Updates. Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board



4. *Hō'ike A Ka Hopena O Nā Hanana PGA 2021*
Presentation on Results of the 2021 PGA Events and Associated Activities.
Recommendation to Approve Final Year Funding for CY2022 Events and Activities to the Full HTA Board

5. *Hō'ike A Nā Hanana o Ko HTA Hoa Kūkākūkā Holoholo Moku pili i ka makahiki 2021*
Presentation on 2021 Activities Related to HTA's Cruise Consultant and
Recommendation to Approve FY22 Funds to Support CY22 Activities to the Full HTA Board

6. *Ho'oku'u*
Adjournment

Kono 'ia ka lehulehu e nānā mai i ka hālāwai a ho'ouna mai i ka 'ōlelo hō'ike kākau 'ia no kēlā me kēia kumuhana i helu 'ia ma ka papa kumumana'o. Hiki ke ho'ouna mai i nā 'ōlelo hō'ike kākau 'ia ma mua o ka hālāwai iā carole@gohta.net. Inā pono ke kōkua ma muli o kekahi kīnānā, e ho'omaopopo aku iā Carole Hagihara-Loo (973-2289 a i 'ole carole@gohta.net), he 'ekolu lā ma mua o ka hālāwai ka lohi loa.

Members of the public are invited to view the public meeting and provide written testimony on any agenda item. Written testimony may be submitted prior to the meeting to the HTA by email to carole@gohta.net; Any person requiring an auxiliary aid/service or other accommodation due to a disability, please contact Carole Hagihara-Loo (973-2289 or carole@gohta.net) no later than 3 days prior to the meeting so arrangements can be made.

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Approval of Minutes of the September 1, 2021
Marketing Standing Committee Meeting



**REGULAR MARKETING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY
Wednesday, September 1, 2021 at 2:31 p.m.
Virtual Meeting**

MINUTES OF MARKETING STANDING COMMITTEE MEETING

COMMITTEE MEMBERS PRESENT:	Daniel Chun (Chair), George Kam, Benjamin Rafter, Kyoko Kimura, and Sherry Menor-McNamara
COMMITTEE MEMBER ABSENT:	Fred Atkins
HTA STAFF PRESENT:	John De Fries, Keith Regan, Kalani Ka'anā'anā
GUESTS:	Senator Wakai, Representative Richard Onishi, Jennifer Chun, Ireen Lee, Lorenzo Campos, Darragh Walshe, Eric Takahata, Mitsue Varley, John Monahan, Jay Talwar, John Reyes
LEGAL COUNSEL:	Gregg Kinkley

1. Call to Order and Pule:

Mr. Keith Regan, HTA Chief Administrative Officer, called the meeting to order at 2:31 p.m. He provided instructions to the general public with regards to submitting testimony. Mr. Regan confirmed the attendance of the Committee members by roll call.

Mr. Mason Fisher opened the meeting with a pule acknowledging September as the beginning of Hawaiian History Month with the 2nd day as Queen Lili'uokalani's birthday.

2. Approval of Minutes of the July 28, 2021 Marketing Standing Committee Meeting

Chair Chun requested a motion to approve the minutes of the March 24, 2021 Marketing Standing Committee meeting. George Kam made a motion, which was seconded by Kyoko Kimura, and was unanimously approved.

3. Presentation by Hawai'i Tourism Korea on Brand Management Plan Amendments and Updates. Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board

Chair Chun recognized Kalani Ka'anā'anā, Chief Brand Officer, to provide an overview. Mr. Ka'anā'anā acknowledged a dynamic recovery through the pandemic with highs and lows. He noted that the five markets will provide an update on their amended brand management plan from September to December 31, 2021 in terms of adjustments to individual market conditions and messaging which includes performance measures.

Chair Chun recognized Ireen Lee, HTK Country Manager, to provide an update. Ms. Lee reported that Korea's forecasted economic growth from 4.0% to 4.3% due to growth in exports surging to 30%. She noted that they have an average of 1,700 COVID cases/day during the past week but went down yesterday and is slowly being controlled with the Seoul metropolitan area banning private gatherings of 3 or more people past 6 p.m. She said that 30% of the population completed vaccination while 57% had their first dose and that the government is pushing to reach 70% by the end of September. Ms. Lee added that about 32 million people will be fully vaccinated by November and will be able to travel. Ms. Lee said that the government requires a negative PCR test for all arrivals with the fully vaccinated exempt from the 14-day quarantine upon return to Korea. She added that departure from the country the day after being vaccinated is now allowed.

Ms. Lee reported that the international flight operations and passenger traffic increased by 43% and 36% respectively in June. She noted that there's a gradual increase of Koreans travelling to Hawai'i in the first half of 2021 and that Korean Air and Asiana Air will resume flights to add to the Hawaiian Airlines which is flying three flights per week. She added that honeymooners have started booking to Hawai'i and Maldives, and travel influencers are uploading travels to as far as Europe and U.S. She said that they are targeting high value mindful visitors and have adjusted their brand messaging to promoting Hawai'i as a sustainable destination to visit after October and post-vaccination. Ms. Lee outlined five key recovery strategies which include implementation of Mālama Hawai'i in all activities, delivering HTA's strategic pillars, refreshing Hawai'i's image as a sustainable and clean destination, inspiring Korean travelers to Hawai'i and driving business to local communities, and revitalizing market demand with industry partners after October. She noted that they will be working closely with key influencers to disseminate the Mālama messaging and to create social buzz. She added that they will also be working with Naver Travel to publish posts highlighting the HTA pillars and Mālama Hawai'i message. Ms. Lee said that key trade programs will focus on educating travel trade partners on the latest destination updates and messaging, conducting airline co-ops to increase ticket sales, and regenerative tourism co-op promotions with major wholesalers and OTAs.

Ms. Lee reported that the key MCI programs are the same which includes a webinar meeting with Meet Hawai'i Ohana to share the latest updates and messaging. She said that

some of their budgets are shifted after October. Ms. Lee noted that their performance measures have two changes namely, the increase to over two million in publicity value and to over 40,000 impressions on digital marketing.

Ms. Menor-McNamara asked about the impact of Hawaii's travel restrictions to their estimated number of visitors. She further asked about their target market. Ms. Lee responded that not much change is seen with the low number of travelers at this time and have shifted the actual sales campaign to October. Ms. Lee added that they are targeting a broader audience and not just on repeat visitors. Ms. Kimura asked if HTA should campaign on skipping the PCR test since both Japan and Korea are taking the same vaccines. Mr. De Fries responded that there aren't formal discussions yet but will carry the message forward.

Ms. Menor-McNamara asked about metrics on achieving ROI with the budgets. Mr. Ka'anā'anā responded that select performance indicators were shown but can provide the full performance indicators. He explained that they are focusing on long-term brand building and visitor education where the ROI would translate to staying top of mind, education and being present and less on metrics like arrivals and PPDS. Ms. Menor-McNamara further asked about ways to measure the impressions. Chair Chun responded that they can look at how much the impressions are worth. Ms. Kimura affirmed that the visitors' expenditures should be one of the KPIs or the impacts to resident sentiments. Mr. Ka'anā'anā responded that they can provide publicity value as one of the performance measures. He added that the budget is for building the business for the future which is not an immediate ROI but that they will certainly track it. Chair Chun clarified if the original KPIs of PPDS, VSAT and resident sentiment is still tracked. Mr. Ka'anā'anā confirmed with the caveat of not being able to field it due to lack of sample size.

Chair Chun invited the public to provide testimony, and there was none. Chair Chun asked for a motion to recommend approval HTK's amended BMP. George Kam made a motion, which was seconded by Ben Rafter. Mr. Regan confirmed the votes through roll call, and it was unanimously approved.

4. Presentation by Hawai'i Tourism Canada on Brand Management Plan Amendments and Updates. Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board

Chair Chun recognized Lorenzo Campos, Account Director of Hawai'i Tourism Canada, to provide an update. Mr. Campos reported that Canada invested C\$435 billion as fiscal response to COVID and extended the wage subsidy program to November 2021. He noted that the Canadian dollar has been above the \$0.75 to the U.S. dollar and that the consumer confidence is back to pre-pandemic levels with lots of people buying real estate and investing, thus economy is moving a bit faster. He added that unemployment rate is at 7.5%. Mr. Campos said that 52 million doses of vaccines have been given with the Prime Minister setting the end of September to have 100% of the population immunized. He

noted that Canada has below 20,000 active cases and reduced travel restrictions allowing all international travelers. He added that a negative PCR test is required but quarantine is not required for the double vaccinated. He noted that there might be a change in the pandemic management if the PM will not be re-elected in September 30th federal election.

Mr. Campos reported that Air Canada has put 165,500 seats for the winter and will resume flights in September with WestJet, with new routes opening to the French Canadian markets. He noted that there's a pent-up demand for travel and Canadians are betting for Hawai'i for the winter season. He added that the travelers are asking for flexibilities in bookings and are looking for safety and health protocols in place like in Hawai'i. He said that competing destinations like Jamaica, Cayman Islands and Florida have active social media presence while Mexico has a disengaged promotions from different destinations and hotel chains.

Mr. Campos reported that their main target audience are people aged 35 to 64 followed by snowbirds and millennials. He noted that they are representing the destination as unique, iconic, breathtaking, and a place to reflect and connect with nature. He added that their strategy includes digital/social campaigns, airline campaigns, webinar series, Aloha Canada and dedicated newsletters. He said that Quebec started their Vaccination Passport Act and will move throughout different provinces with Ontario being resilient to it. Mr. Campos said that the proposed budget is mostly allotted towards the end of the year with the Aloha Canada and the launching of larger campaigns with tour operators and airlines in preparation for the winter season. He said that their performance measures remain the same except that trade shows will include the Aloha Canada and the two airlines and allocated funds from the supposedly trade FAMS to the Quebec market.

Ms. Kimura asked for the sample size to be able to field the VSAT. Ms. Chun responded that it depends on the number of arrivals and people agreeing to take the VSAT. She noted that they keep track of PPDs and it's reported every month. Ms. Menor-McNamara asked how the effectiveness of the education campaign is evaluated. She further asked about the turnaround time where the actual visitors make their reservations. Mr. Ka'anā'anā responded that the strategy's emphasis is long-term brand building and visitor education which is not done overnight but a continuous message that is to be relayed in every point of the visitor journey. Mr. Campos added that they are looking to educate the travel agents and make them message ambassadors so that they can educate their own clients. Chair Chun agreed that Hawai'i's branding is a long-term proposition and a fair point to think about performance moving forward and maybe has to do with VSAT long term. Mr. Ka'anā'anā noted that they have revised the marketing effectiveness survey to make it an effective tool and that together with Ms. Chun, they are building the framework on how to measure the campaigns in terms of ROI and on managing the BMPs and RFPs. Mr. Chun said that they could look on cost per acquisition or cost per click to see the return is on the spend itself, which is not necessarily tied to arrivals and spending but with engagement. Ms. Menor-

McNamara agreed that it's a long-term process and said that if they can have a benchmark to ensure that there's an ROI to the dollars spent, they can gauge if they need to adjust the marketing dollars which is a step up approach as well.

Chair Chun invited the public to provide testimony, and there was none. He asked for a motion to recommend approval of HTC's amended BMP. George Kam made a motion which was seconded by Sherry Menor-McNamara. Mr. Regan confirmed the votes through roll call, and it was unanimously approved.

5. Presentation by Hawai'i Tourism Oceania on Brand Management Plan Amendments and Updates. Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board

Chair Chun recognized Darragh Walshe, Account Director of Hawaii Tourism Oceania, to give an update. Mr. Walshe reported that with the COVID elimination approach in Oceania the domestic economy remained strong with low unemployment and strong currency versus the USD. He said that with the delta strain, much of Australia and New Zealand entered a lockdown status. He added that Australia will allow travel to start with an 80% vaccination threshold while New Zealand will begin travel for those vaccinated in the New Year. He noted that key airline partners are optimistic with the return of travel on Q1.

Mr. Walshe reported that they have refined their target audience to mindful millenials, fun and fit families, and curious couples. He noted that they are focusing on the visitors who care, are aware and who share with activities aligned to providing awareness and sharing experiences to the right people. He added that their approach is to reconnect and re-educate the travel trade so that by year end, they can hold physical events for the regenerative tourism approach and re-launch of the destination. He noted that the key project will be bringing the Mālama Hawai'i initiative to the market through activities such as working with trade and industry partners and press and social media promotions. Mr. Walshe reported that November and December will have the majority of the program budget spend and that these two months will see more influence on the performance measures which includes audience reach, trade engagements, influence and incremental gains in the MCI sector.

Ms. Kimura asked about the additional personnel. Mr. Walshe responded that they have help on a part-time basis in the Australian market for now. Ms. Kimura further asked how he's working with the global MCI at HVCB. Mr. Walshe responded that they have a joint partnership with HVCB for a global event and are working together with them where they can.

Chair Chun asked for a motion to recommend approval of HTO's amended. George Kam made a motion which was seconded by Ben Rafter. Mr. Regan confirmed the votes through roll call, and it was unanimously approved.

6. Presentation by Hawai'i Tourism Japan on Brand Management Plan Amendments and Updates. Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board

Chair Chun recognized Eric Takahata, Managing Director of Hawaii Tourism Japan, to give an update. Mr. Takahata reported Japan's Q2 economy showed positive growth from GDP, consumption, capital expenditures, domestic demand and exports. He noted that Japan is currently at 46.2% completely vaccinated and are targeting herd immunity by December. He said that the vaccine passport program started on July 26 which eased quarantine measures to 23 countries. He noted that the airlines remain committed to the routes with cargos and people moving back between Japan and Hawai'i. Mr. Takahata noted that overseas travel is a top activity for consumer sentiments once the pandemic is under control. He added that according to Expedia, O'ahu is the top searched travel destination between December and January. He noted that activities of competing destinations are mostly virtual with some hybrid events.

Mr. Takahata reported that HTJ's recovery strategy falls under the Mālama umbrella which is to reinforce the new tourism direction and messaging, communicating with industry partners to adopt a unified message, educating visitors on mindful travel, and continuous reinforcement of messages to consumers and industry partners. He noted that their target audience will be the repeat visitors, Japanese hula communities, new normal workers, timeshare owners, Japanese corporations and top ranked schools. He added that they will focus on three campaigns namely, on-island infrastructure development and community engagement, direct consumer initiatives, and trade travel programs. He explained that the first campaign stemmed from Ms. Kimura's idea of using some of the budgets to help support Hawai'i's community. He said that HTJ is proposing budget for getting the Japanese system ready when the online reservation system assistance is out, for messaging through local community engagements through social media and for implementing an O'ahu visitor shuttle bus initiative serving all markets. He noted that the direct consumer initiatives program is about reinforcing and educating Mālama and keeping Hawaii top of mind. He added that the travel trade programs will directly impact the restart of bookings from Japan mainly in Q4 and into Q1 next year. Mr. Takahata reported that they are looking to restart the initiatives in September and implementing it to Q4 and Q1 of 2022. He said that they have nearly 4000 registrants from Japan for the Honolulu Marathon or 10K run and hoped that it will push through. He proposed for a \$2.5 million budget with the remaining to be allocated to programs and initiatives. He showed the list of associated performance measures and noted that these are selected and are happy to discuss about it.

Mr. Rafter asked whose initiative is the reservation system. Mr. Ka'anā'anā responded that it's an HTA initiative but DLNR are building their own site. He said that HTA envisions building a system that is on top of the different systems (county, states, etc.) with different languages that translates and functions in other markets as well. He added that HTA will manage the system. Chair Chun asked clarifications about the system. Mr. Ka'anā'anā responded that the system is for the visitor to understand the various jurisdictions whether it's county or state

or DOFA vs. state parks division. He added that their model is www.recreation.gov which pulls the different permits needed on public lands and to build a system that works with all systems across state making it user-friendly. Ms. Kimura asked if HTJ will provide the reservation in Japanese language. Mr. Ka'anā'anā affirmed saying that it will be built for other languages if there's room.

Ms. Menor-McNamara asked about the additional money from the budget. Mr. Ka'anā'anā responded that they are waiting for the results of DLNR's work before they rollout. He noted that Diamond Head is the next part to rollout and DLNR will use the money collected from it to fund the rest of the system. He explained that once done, they will look into true initiatives. Ms. Kimura asked about the budget for the shuttle bus. Mr. Ka'anā'anā responded that the budget is just an estimate and intended to be a pilot for north shore of O'ahu and Kailua. He added that they will come back with a more formal proposal after approaching the partners but the budget is based on previous experience as a starting point. He added that they've done some outreach to board chairs and others about the idea and had received positive feedback from elected representatives on neighborhood board level and legislature. Ms. Menor-McNamara asked where the remainder of the funds would be allocated if it wasn't fully spent. Mr. Ka'anā'anā responded that it will go back to HTJ and HTA will figure out how best to use it.

A discussion was made about the shuttle bus initiative and local community engagements thru local media coming from HTJ's budget. Mr. Mr. Ka'anā'anā responded that the initiative is to address visitor traffic issues seen in the DMAP and that the budget comes from HTJ with more budget than the other markets while leaving the US budget alone for all travelers are coming from their market. Mr. Takahata said that it is envisioned as a coop with a rider fee to sustain it and Mr. Ka'anā'anā added that it will begin as a startup initially. Rep. Onishi cautioned that their challenge with the budget is staying within their lane as it's hard to justify why they give the money to HTA instead of the entity supposed to be responsible for doing it. He advised to be careful on taking such lead as the legislature may not see it as their responsibility. Mr. Ka'anā'anā shared that it was positively accepted with their initial conversations with folks from the bus, OTS, HTA elected, Senate, house and council members, neighborhood board and others. Chair Chun addressed the comment of Senator Wakai that the intention is not to spend money because it's there but to utilize the funding that's meant for tourism management thru HTA on better managing tourism and addressing the community concerns. Mr. Rafter noted that he'd rather spend the budget for building the long-campaign marketing now for January and February for the Japanese market rather than on things not addressed by the budget. Mr. Ka'anā'anā clarified that the proposals are not an attempt to spend before losing it but meaningful campaigns put together to recover the market with Japan down at 99% and U.S market down over 40%. He noted that the proposal was a response to the committee's thoughts about Japan's budget and he believes that now is the time to ramp up the Japan market, and he's open to put the money into traditional branding if the committee believes it's the right direction. Mr. Kam noted that they should be prepared in receiving the Japanese when they come so they have the infrastructure to host them and the shuttle bus is a great proposal for the market alone.

Ms. Kimura asked about the Mālama microsite development. Mr. Takahata noted that the work involves editing the English video to make it palatable for the Japanese market, as well as education p that should happen in Q4 to be ready in Q1. Ms. Varley noted that the work is not only about production but includes media plans, messaging, YouTube ads, social media campaigns and working with all of the different partners. Mr. Ka'anā'anā added that the focus, just like in the other markets, is doing long term brand building and important campaigns that run now even though actual arrivals don't start immediately. Ms. Kimura asked if it's possible to engage with coops now and engage next year. Mr. Takahata responded that the coop initiatives for airlines and industry start in Q4 to affect bookings for New Year even for the marathon period in December. Ms. Varley added that the wholesalers are doing sales promotion for coop program in November and December are looking for the booking pace for spring and beyond. Ms. Menor- McNamara asked if they are confident that the current status in Japan will materialize so that the money spent is effectively spent or that they should wait with the situation in Hawai'i. Mr. Takahata noted that the education part should continue and can look at retaining flexibility with the coop campaign depending on what happens with the market. Rep. Onishi noted that spending money before the visitors come to Hawai'i is money well-spent. He said that they did a poor job with the U.S. visitors who the residents are complaining about. He added that the Japanese visitors are more open to the concept than the U.S. visitors have been and have no problem with it. Mr. Takahata shared that they have commitments from airlines, media companies and big consumer organizations that will help HTJ in the Mālama messaging without paying for it.

Chair Chun asked for a motion to approve the recommendation for the revised BMP with the local PR and shuttle bus with the local community engagement through local media and visitor shuttle bus initiative excluded in the amended plan which will be revisited over the next months. Mr. Kam made a motion which was seconded by Ben Rafter. Mr. Regan confirmed the votes through roll call, and it was unanimously approved.

7. Presentation by Hawai'i Tourism USA on Brand Management Plan Amendments and Updates. Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the full HTA Board

Chair Chun recognized Jay Talwar and John Reyes to give an update. Mr. Talwar reported that the U.S. economy is doing well with consumer spending up and unemployment down. He noted that they have seen the delta variant spike in Covid-19 cases and that Hawai'i is doing very well versus the rest of the U.S. He said that the CDC recommends non-vaccinated U.S. residents to refrain from taking domestic travel while the fully vaccinated can travel safely within the U.S. He added that the basic mask-wearing and safety protocols are still in place. He noted that 54% of U.S. travelers are less interested to travel now with the spike of the delta variant. He added that 66% of the U.S. travelling population is now fully vaccinated. He noted that Puerto Rico, United Kingdom and EU are opening up to vaccinated American travelers and that huge marketing budget increases are seen in California, Florida and New York City for the U.S. market. Mr. Talwar reported that there's a

growth of 36.2% in air seats for September compared to 2019 and continue to a slightly less degree in October and November then dropping in December. He noted that they aren't quite up to where they were in 2019 and there's softness in the market in terms of hotel booking pace. He noted that the daily visitor arrivals pushed downward with the Delta variant and with the governor's announcement of not traveling to Hawai'i through end of October.

Mr. Talwar reported that they are targeting the mindful visitor and have worked with MRI, a research firm, to define who they wanted to target, making sure that they are the right target in terms of yield for the destination. He noted that they started with the Mālama campaign in May for their recovery strategy with the objective of increasing awareness and appropriate behaviors of mindful travelers in Hawaii. He added that they have worked with paid programs like Condé Nast and Matador for educational purposes. He said that their annual proposed budget is \$14.6 million which kicked in August and September and winding down in November.

Mr. John Reyes reported that they spent about \$207,000 for Global MCI from January through June but with the vaccine producing confidence and hope, they look forward to going back to the traditional direct sales methods in the next half of the year. He noted that September is a critical month as they're trying to get as much short-term opportunities in Q4, along with future events. He added the \$80,000 budget for that month may shift to a lower number with events being cancelled. He said that October is a slow month but picks up in November with the largest trade show, IMEX America. He added that the budget for December is for new markets participating in international expo managers to talk about the convention center. He hoped to have a fully funded city-wide sales department this September which will be the addition of sales people. He said that they will be putting together a Mālama balance scorecard where they will match up city-wide convention centers coming in with local non-profits to be able to give back with the latter to be able to score in community, culture and natural resources.

Mr. Talwar reported that the performance measures are travel industry specific in terms of annual target and business brought into the state from the U.S. market. He noted that it is roughly 30% greater spending through June and July versus 2019 and 5% greater per person. Mr. John Reyes said that the MCI performance metrics for trade shows and MCI FAMs will vary and are going to be flexible with Hawai'i's fluidity. He added that Meet Hawai'i ended up cancelling going to Connect 2021. He noted that they have reached 46,000 room nights vs. the 68,000 target with just one-person single property team seller on the first half of the year. He added that the 122,000 target for the second half will be achieved with the addition of new sellers. He said that they're hoping that one or two Citywide definite that are on hold may be able to push through by the end of the year. He said that 40% of their efforts are focused on new business traditionally. He reported that the 100,000 target for single property room nights exceeded over 250,000 potential room nights which shows the future demand for 2022. He noted that the definite room nights from January through June were 20,789 compared to the 25000 goal which at 83%. He

noted that for new opportunities, they almost came in on an 11000 with the goal of 12,000 and hopes to remain at the 80% and above pace.

Mr. Rafter asked if there's really opportunity to get Q4 MCI bookings given the delta variant and the governor's message. Mr. Reyes responded that they will be optimistic with any opportunity but definitely sees opportunity in 2022 and beyond. He added that he just mentioned the Q4 2021 so that the committee will know that they try to cover short term as well. He noted that there will be adjustments to the September spend with meeting cancellations. Mr. Rafter asked for insights on visitors who are coming in vaccinated versus PCR tests. Mr. Monahan responded that there's a 2% difference on residents vs. visitors who are vaccinated with the former having greater number. He noted that the big difference is on people being forced to go into quarantine with 7% of the residents choosing to go into quarantine and only 1% of the visitors are ending up in quarantine because they failed on some entry requirements. Mr. Kam added that 70% of visitors are coming vaccinated and that they could encourage more of it. Ms. Kimura suggested sending out the information about the number of beds occupied by the visitors at the hospital. Mr. Monahan responded that there were not many of them as mentioned in Mayor Blangiardi's news conference. Chair Chun noted that these statistics are important and a matter for HTA to get the news out.

Chair Chun asked for a motion to recommend approval of HTA's amended BMP. George Kam made a motion which was seconded by Sherry Menor-McNamara. Mr. Regan confirmed the votes through roll call, and it was unanimously approved.

8. HTA Branding Budget Discussion and Action

Chair Chun informed that they wanted to discuss and develop potential strategies for tourism recovery messaging. He acknowledged Kalani Ka'anā'anā to provide an update. Mr. Ka'anā'anā noted that the fundamental strategy for recovery is based on brand messaging continuity and visitor education on responsible travel. He stressed that with how to travel responsibly, it's about reinforcement of getting vaccinated, wearing masks, washing hands and staying in when sick. He asked the committee for direction of whether or not something beyond those mentioned is warranted and is happy to have the conversation.

Ms. Menor-McNamara asked if there's anything that can be enhanced in the DMAP messaging standpoint and if there was a fielding of any area in communications. Mr. Ka'anā'anā responded that the short answer is that the public officer hiring is still in process with BNS. He added that the DMAP messaging is certainly incorporated and that outlines were included in 2022 Brand Management Plan for each GMT in specific languages on how they can help HTA achieve DMAP actions and support messages. He noted that such is being built up for BMP 2022 and the messaging is also included in the amended BMPs. Mr. Kam said that they wanted to ensure people who are coming despite the announcements that they are great hosts and has to be as welcoming as possible. He added that visitors need to know there are protocols in place for infected visitors where they will be taken care of. He

added that the community should likewise know what HTA has done to ensure the safety of the community in terms of health and economics and to be as respectful. Mr. De Fries said that the delta variant is a statewide hotspot that needs complete laser-like focus that has to be messaged into their communities as well. He said that with their meeting with the DOH, they are convinced that it's not all about promoting vaccines but about getting into the psyche of the ones choosing not to be vaccinated and addressing the misconceptions and misunderstandings. He added that they're targeting not only the workforce but also their families. He explained that part of the branding strategy is going to be Hawai'i regaining its reputation as one of the safest, if not the safest, community and destination in the planet. He explained that there are so many KPIs in DMAP and one is problem solves, situation improving or failing and should try something else. He added that they have to learn as a society to live respectfully with variants in the future and stop living in fear with the knowledge they know now. He said that a lot of attention is being paid there moving forward.

Chair Chun noted that according to a destination analyst report, about 72% of travelers are unlikely to travel to unwelcoming destinations. He said that they wanted to make sure that Hawai'i don't get to such place by managing tourism's impact to Hawai'i and making sure that visitors are welcome. Mr. Ka'anā'anā said that if they really wanted to attack the resident sentiments, it's about people feeling welcome or not which is a kind of action being proposed in the DMAP and the things done to manage the destination like the shuttles which are means to improve resident sentiment and address the welcoming feeling for visitors when they arrive. Chair Chun noted that the Board appreciates the ideas and will figure out on how to realize it but not with the budget mentioned. Ms. Kimura also thanked HTA staff for taking the reservation system that she asked into consideration and acknowledged them for their creativity.

Chair Chun invited the public to provide testimony, and there was none.

9. Adjournment:

The meeting adjourned at 6:07 p.m.

Respectfully submitted,



Sheillane P. Reyes

Recorder

3

Presentation by Hawai'i Tourism Japan on Brand Management Plan Amendments and Updates.
Recommendation to Approve the Amended Brand Management Plan for the Remainder of CY2021 to the Full HTA Board



2021 BMP UPDATE

**HTA MARKETING STANDING COMMITTEE MEETING
9.29.2021**

Eric Takahata
Managing Director

MARKET SITUATION

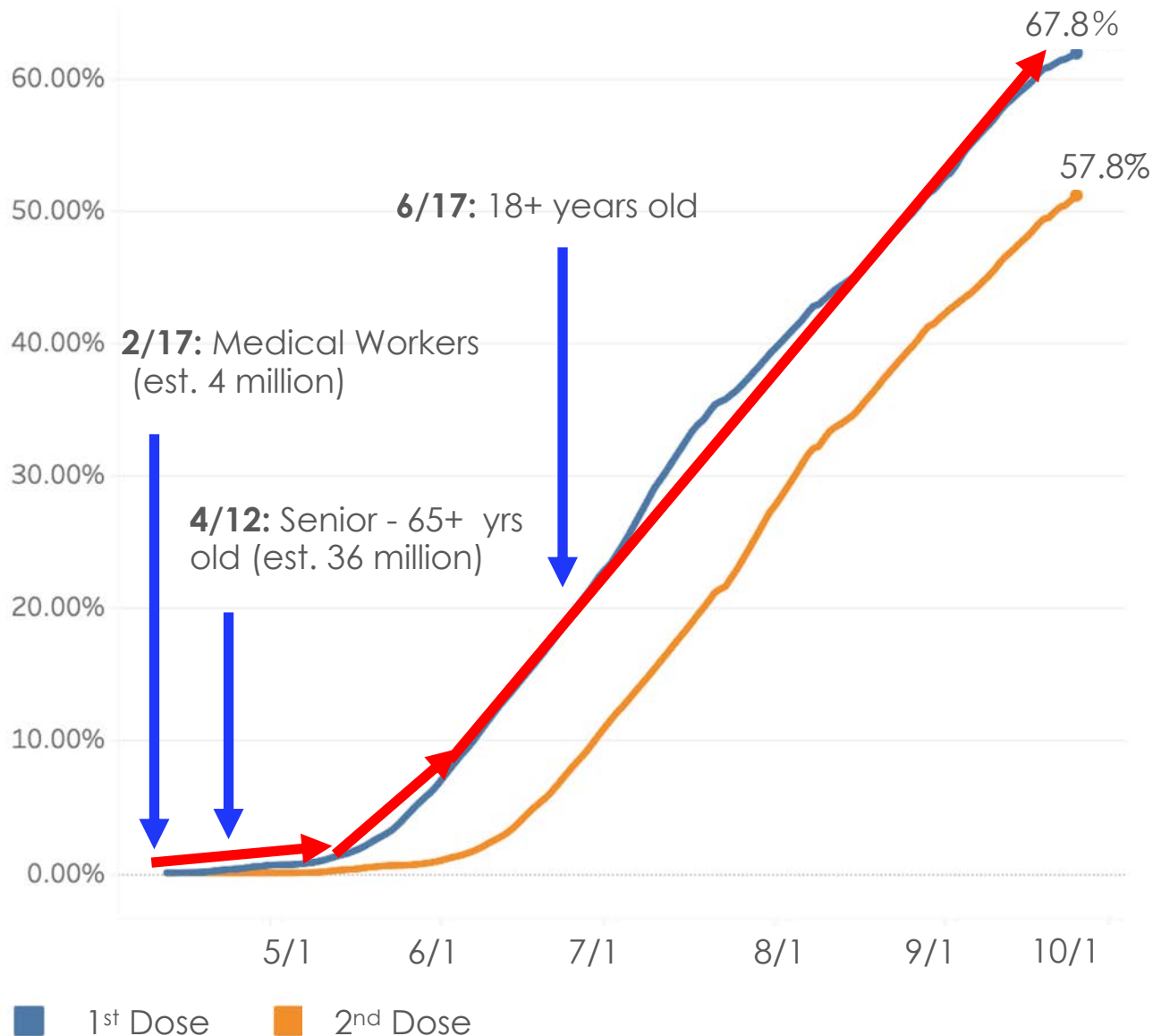


GENERAL ECONOMY



- Japan GDP rebounds in Q2 with 1.9% annualized growth (revised 9/8)
- Consumption rose 0.8% in April-June (vs Previous Qtr)
- Capital expenditure increased 1.7% (vs Previous Qtr)
- Domestic demand contributed 0.6% point to GDP growth
- Exports rose 2.9% in April-June (vs Previous Qtr) in a sign the global recovery continued to underpin Japan's economy

JAPAN VACCINATION PROGRESS



- State of emergency will be released on 9/30
- Japan government target 80% vaccination by December

Vaccination progress (as of Sept. 24)

	U.S.	Hawai'i	Japan
Initiated	64.2%	75.6%	67.8%
Completed	55.2%	67.2%	57.8%

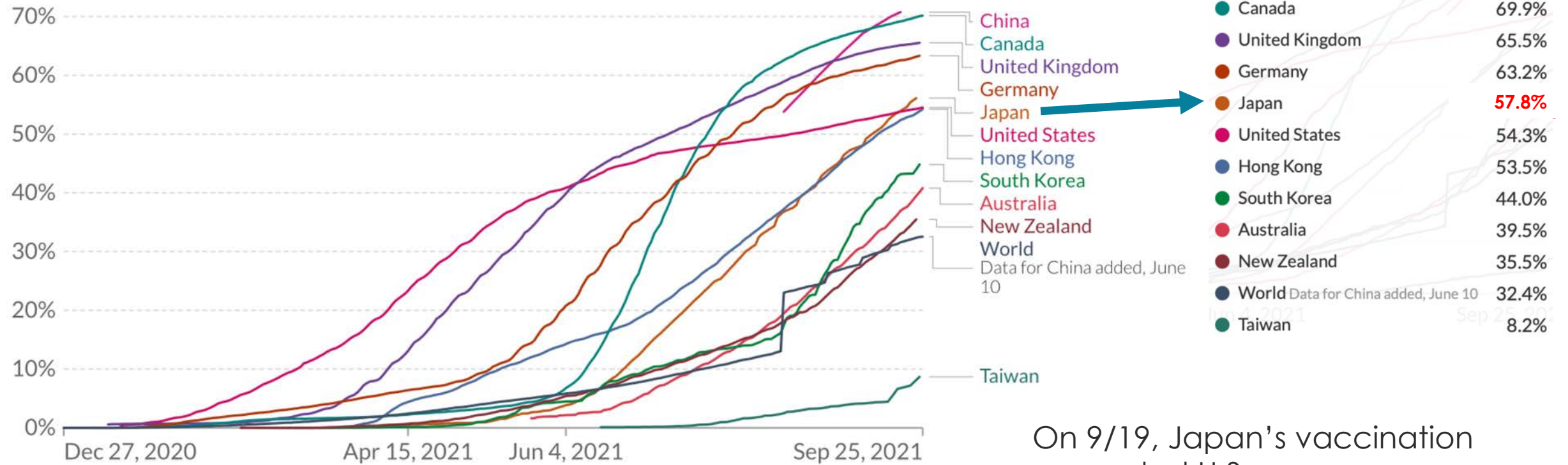
VACCINATION COMPARISON BY COUNTRY

Share of the population fully vaccinated against COVID-19

Total number of people who received all doses prescribed by the vaccination protocol, divided by the total population of the country.



+ Add country



On 9/19, Japan's vaccination exceeded U.S.

MARKET CONDITIONS ~AIRLIFT (SEPTEMBER/OCTOBER)~



September				
Op Airline Name	Flight #	Origin Code	Total Flights	Seats
All Nippon Airway	NH 186	HND	8	1,968
Hawaiian Airlines	HA 822	NRT	13	3,614
Hawaiian Airlines	HA 450	KIX	5	1,390
Japan Airlines	JL 74	HND	10	2,150
ZIPAIR Tokyo	ZG2	NRT	5	1,450
Total			41	10,572

Total Flights # by airport
 ❖ Haneda-18
 ❖ Narita-18
 ❖ Kansai-5
10 to 11 flights per week

October				
Op Airline Name	Flight #	Origin Code	Total Flights	Seats
All Nippon Airway	NH 186	HND	9	2,214
Hawaiian Airlines	HA 822	NRT	13	3,614
Hawaiian Airlines	HA 450	KIX	4	1,112
Japan Airlines	JL 784	NRT	4	744
Japan Airlines	JL 74	HND	9	1,674
ZIPAIR Tokyo	ZG2	NRT	4	1,160
Total			43	10,518

Total Flights # by airport
 ❖ Haneda-18
 ❖ Narita-21
 ❖ Kansai-4
10 to 11 flights per week

JAPAN RECOVERY INDICATORS

Keidanren Policy & Action

The Japan Business Federation (Keidanren) requested:

- to relax restrictions for fully inoculated arrivals as part of its proposals to resume international travel and revive the nation's economy
- to reduce the length of the quarantine for unvaccinated travelers to 10 days

The central government's coronavirus subcommittee proposal plan

As early as October:

- To ease attendance limits on large public events as long as they are fully vaccinated or test negative for Covid-19
- To restart the Go to Travel campaign domestic travel once most people have been vaccinated



JAPAN RECOVERY INDICATORS

CONSULATE - GENERAL OF JAPAN

1742 Nuuanu Avenue
Honolulu, Hawaii 96817
Telephone: (808) 543-3111
Facsimile: (808) 543-3172
Website: www.honolulu.us.emb-japan.jp/

September 13, 2021

Mr. Eric Takahata
Managing Director
Hawaii Tourism Japan
1600 Kapiolani Blvd., Ste. 723
Honolulu, HI 96814

Dear Mr. Takahata:

As vaccinations and other mitigation efforts to prevent the further spread of COVID move forward around the globe, Japan is currently considering what its future requirements will be, to restore foreign travel into the country.

One key component that will be necessary for entry into Japan, will be a vaccine card/proof of vaccination. With regards to the State of Hawaii, Japan will be looking to set forth the following requirements, for a vaccine card/proof of vaccination:

1. It must indicate that the traveler received one of the following Coronavirus vaccines:
 - a) Pfizer
 - b) Moderna
 - c) AstraZeneca(**The Johnson & Johnson vaccine is presently not recognized as an accepted vaccine, but it may be accepted in the future.)
2. It must contain the following information, in English:
 - a) Full name
 - b) Date of birth
 - c) Name of vaccine or vaccine maker
 - d) Dates of vaccination
 - e) Number of doses
3. Either a hard copy or digital copy of the vaccine card/proof of vaccination is acceptable.
4. It must indicate that the traveler has been fully vaccinated (received at least 2 doses of the vaccine, with at least 14 days having passed since receiving the 2nd dose, at the time of entry into Japan).

Page 2

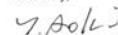
All travelers entering Japan from Hawaii with vaccine cards/proofs of vaccination that satisfy the above requirements will be allowed into Japan, under relaxed restrictions. Specifically, this will mean that quarantine restrictions will be reduced from 14 days to 10 days (Day 1 to be counted from the day after entering Japan, and a negative result from a PCR test taken on Day 10 will be required to exit quarantine).

So that Japan can begin planning for the eventual opening of travel from Hawaii, under reduced restrictions, we would like to request samples of all acceptable forms of proof of vaccination (those administered by government or public institutions, hard copy or digital formats accepted). Upon receipt, we will share this information with other government agencies in Japan.

Consul Aya Kumakura of my office will be in charge of this matter. Please kindly email her at aya.kumakura@mofa.go.jp in response to our request, and with any questions or concerns you may have.

Thank you very much.

Sincerely,



Yutaka Aoki
Consul General of Japan

Shorten the quarantine restrictions from October

14 days



10 days

OTHER DESTINATIONS TOURISM RECOVERY

Destination	Details
Thailand	<ul style="list-style-type: none"> -New International visitors' program "Sand Box Program" (exemption quarantine for fully vaccinated visitors) -2nd tourism reopen starting from October 1 area including Bangkok (1st : Phuket started in July) -Government approved special program (tax exemption and visa status) for long stay vacationer
Australia	<ul style="list-style-type: none"> -Implementation of Vaccine Passport test announced -Timing of the implementation: the residents' vaccination exceed 80% -Target countries: Singapore, Japan, South Korea, United Kingdom, United States and neighbor Pacific Islands
Guam	<ul style="list-style-type: none"> -Guam's vaccination 83.6% (as of 9/14) -Safe Travels Stamps (WTTC) implementation for stakeholders (approved 123 stakeholders) -FIT Tour & Travel Support Program 2021 (Japan: PCR test support max \$200 – 8/9-9/26) -SDGs initiatives "Marine tour operator certified program"

KEY CAMPAIGNS/PROGRAMS

REMAINING BUDGET: \$1,338,804



Objectives:

- Increase bookings for both leisure and MICE ASAP
- Reinforce Mālama Hawai'i (visitors pre-education) messaging and expand distribution

Strategies:

- Collaborate with top airline and wholesale partners to develop targeted campaigns
- Establish B to C initiatives with key industry partners
- Educate new travel trade industry personnel and expand virtual educational seminars and fam tour efforts
- Plan and secure additional co-op advertising and increase media tie-up opportunities

5 KEY CAMPAIGN/PROGRAMS

1

Airline Co-op

2

Wholesaler Co-op

3

Other Co-op Opportunities

4

Accelerate Future MICE Bookings

5

Mālama Hawai'i Message Distribution and Education

KEY CAMPAIGN/PROGRAMS

1. Airline Co-op: \$100,000

Media Tie-up

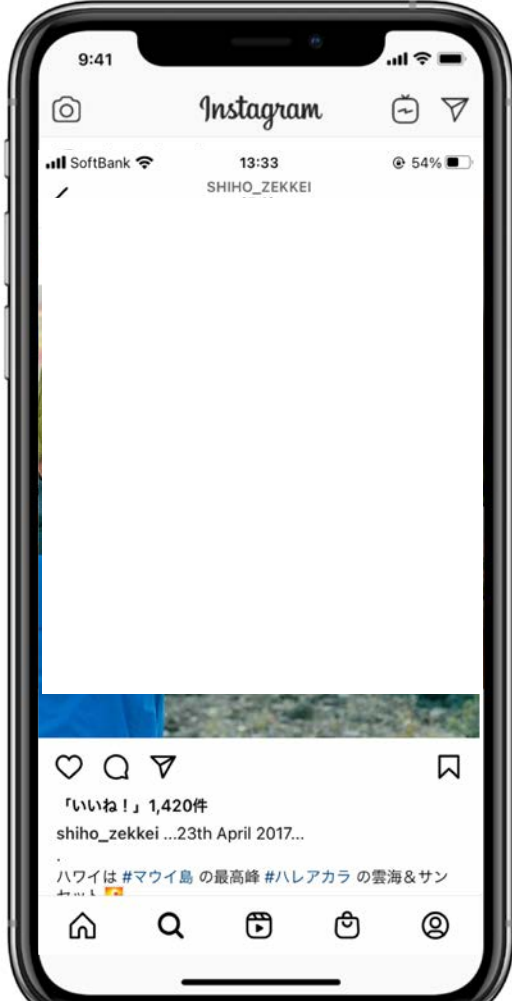
The top part of the image shows a screenshot of a Japanese website for Hawaii tourism. It features a map of Hawaii and various travel-related images. A large vertical text overlay reads "今こそ、待ち焦がれたハワイへ" (Now, to the long-awaited Hawaii). The bottom part of the image shows a JAL advertisement with the text "快適な空旅の先に 憧れの地が待っている" (In front of a comfortable flight, the land of your dreams is waiting) and the JAL logo.

Mileage Membership Promotion for Elite member

This advertisement is for an ANA promotion. It features a large image of an ANA airplane. The text includes: "2021年8月-9月 搭乗分限定" (Limited by flight segments from August to September 2021), "ANA国際線特典航空券 東京⇄ホノルル線限定" (ANA International Special Airfare, Tokyo-Honolulu route only), and "最大10,000マイルバック キャンペーン" (Maximum 10,000 mile back campaign). Below this, it promotes a JAL Points promotion: "ハワイ旅行で eJALポイント プレゼント!" (Hawaii travel with eJAL Points present!). It also mentions a "Web予約限定!" (Web booking only!) and a deadline of "2019年6月10日(月)~7月3日(水) お申し込みまで!" (From June 10, 2019, to July 3, 2019, apply here!).

SNS Promotion

The top part of the image shows a screenshot of the Hawaiian Airlines website with the heading "Travel Pono". Below this are two Instagram posts. The first post features a scenic view of a tropical landscape with the text "Travel Pono means to explore with care, offering your koha (help) to preserve our natural resources, cultures and communities. It's recognizing your responsibility while getting a deeper connection to Hawaii." The second post features a close-up of a flower with the text "Trek responsibly".



MĀLAMA STYLE

実践していること②
 (自分で作る)ことを レジャーにしています

実践していること③
 物々交換にユーモアを

43

Hanako Hawaii Tours

ハナコのハワイツアーズ

自分にもみんなにもやさしい暮らし。

「ハワイには、年齢も性別も関係なくただ大事に思う、ある言葉があるんです。」

人の名前を大事に呼ぶ

43





393 Satellite offices



177 Branches



600 Branches

Perfect moments, always

B to C Trade Show



株式会社 令和トラベル

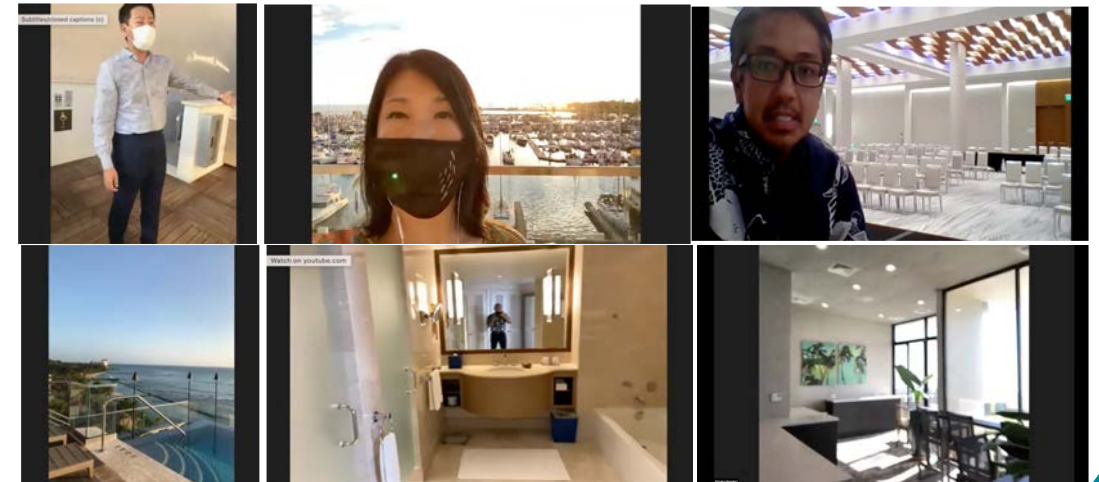


Education

Webinar




Virtual FAM tour




KEY CAMPAIGN/PROGRAMS

3. Other Co-op Opportunities: \$250,000



Feel Aloha!
ハワイ気分を楽しもう
キャンペーン!

～美しいハワイを守るためにできること～



— MĀLAMA —
HAWAII

～美しいハワイを守るためにできること～

マラマハワイの活動をご存知ですか？

Mālama Hawaii “マラマハワイ”は、ハワイを思いやる心、ハワイが持つ素晴らしい伝統文化や美しい自然環境を守っていくために、ハワイ州では様々な取り組みが行われています。

「Feel Aloha! ハワイ気分を楽しもう!キャンペーン」の主催者であるヒルトン・グランド・パケーションズでもこのマラマハワイの活動をサポートしています。

今回、ヒルトン・グランドパケーションズより「Feel Aloha! ハワイ気分を楽しもう!キャンペーン」の応募者様1名につき10円をマラマハワイの活動に寄付し、持続可能な観光と美しいハワイを守るための活動にお役立ていただきます。

キャンペーンで集まりました募金額は、キャンペーン終了後にヒルトン・グランド・パケーションズのホームページにてご報告いたします。

マラマハワイの活動について、詳しくはこちら

Credit Card Company



地球にやさしい旅を | 旅行者の皆さんの思いやりの心が、
ハワイの美しさを保つことに繋がります。

— MĀLAMA —
HAWAII × JCB
Uniquely Yours

マラマハワイ 検索



地球にやさしい旅を | 旅行者の皆さんの思いやりの心が、
ハワイの美しさを保つことに繋がります。

— MĀLAMA —
HAWAII × JCB
Uniquely Yours

マラマハワイ 検索



Membership



福利厚生代行サービスで従業員満足と顧客満足の上昇に貢献する「リロクラフ」の公式サイトです。

株式会社 **リロクラフ**

福利厚生倶楽部
導入企業数 No.1※

低コストで充実した福利厚生制度の構築・導入が可能に。
契約数は業界最多の14,800社、
会員数638万人以上の
福利厚生アウトソーシングサービス。

契約社数 14,800 以上

会員数 638万 以上

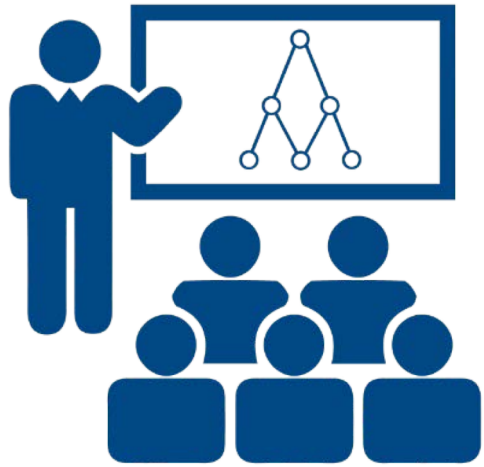
※「福利厚生」2021.05月で年中集計データより

MIZUHO
Membership



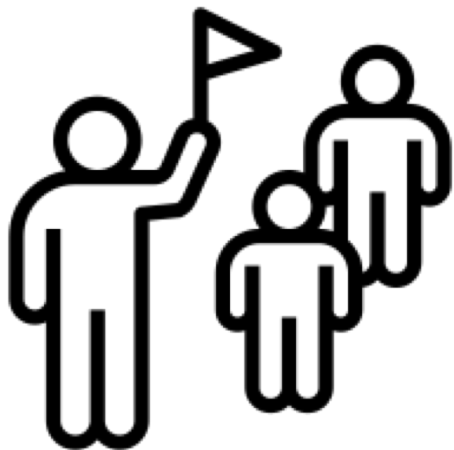
KEY CAMPAIGN/PROGRAMS

4. Accelerate Future MICE Bookings: \$150,000



● **キャッチコピー**
自然を、大地を、人間を
想いやる心、愛する心、
Mālama
ハワイが、そして世界が、
この言葉に、この優しさに包まれたら、
この地球はもっと美しくなるはず。
この星のための合言葉

● **マラマハワイロゴ**
— MĀLAMA —
HAWAII
地球にやさしい旅を



Total Co-op Funds

	HTJ	Partners	Total	Matching Ratio
Total	\$ 900,000	\$ 5,450,000	\$ 6,350,000	1 : 6

FRAU SDGs



Instagram
投稿キャンペーン

九州での旅先の写真に /
#malama旅

のタグを付けて九州の再発見スポット写真を投稿して
素敵なプレゼントをGETしよう!

キャンペーン期間:
2020.9.1 (土) - 2021.2.28 (土)

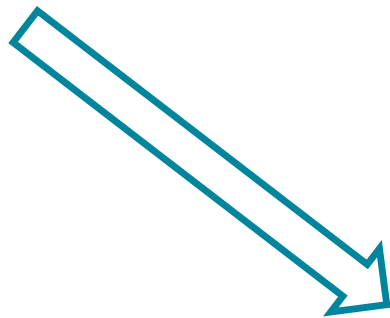


FRAU

Mālama Hawaii

世界一美しい自然環境になったハワイで、
心豊かに暮らそう。

SDGs



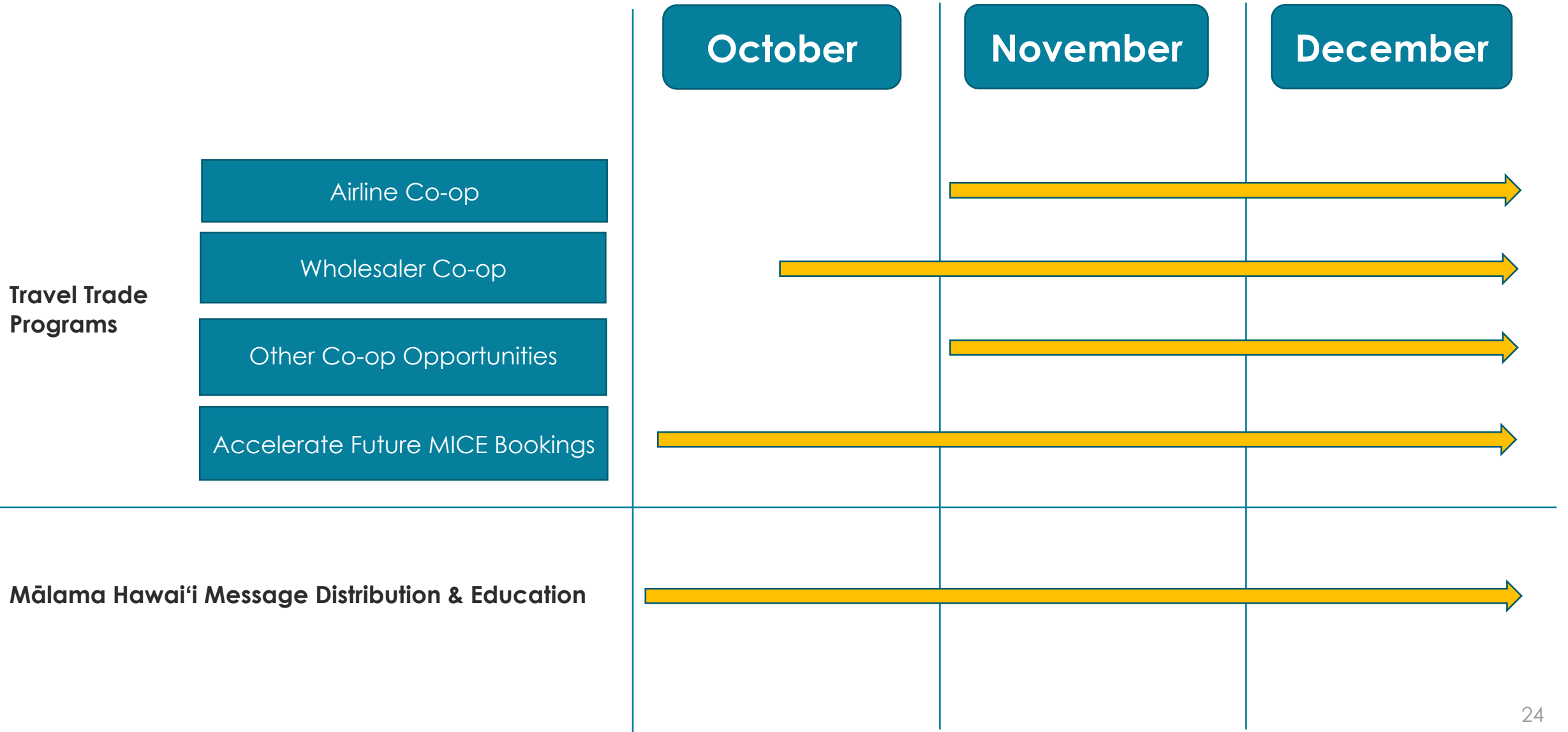
HAWAII TOURISM JAPAN

Mālama POINT 1

環境問題の解決策は、私たち一人ひとりの行動から始まる。自然環境を守り、持続可能な社会を実現するために、私たちができることは何か。その答えの一つが、Mālama Hawaii。このプロジェクトは、ハワイ島の自然環境を保護し、持続可能な社会を実現するために、私たちができることを目指している。このプロジェクトは、ハワイ島の自然環境を保護し、持続可能な社会を実現するために、私たちができることを目指している。



CAMPAIGNS TIMELINES



PROPOSED BUDGET



PROPOSED BUDGET JULY - DECEMBER

	Annual Budget	Jan-Jun Actual	Bal for Jul-Dec	Jul	Aug	Sept	Oct	Nov	Dec
Fixed Costs	\$2,051,196	\$1,032,715	\$1,018,481	\$165,082	\$169,667	\$170,933	\$170,933	\$170,933	\$170,933
Program Budget	\$2,448,804	\$0	\$2,448,804	\$0	\$0	\$145,015	\$553,750	\$989,946	\$760,093
Total	\$4,500,000	\$1,032,715	\$3,467,285	\$165,082	\$169,667	\$315,948	\$724,683	\$1,160,879	\$931,026

PERFORMANCE MEASURES



PROPOSED PERFORMANCE MEASURES

	Annual Target Most Recent (REV 2/17)	Annual Target Updated on 9/26	Semi-Annual Targets Updated on 9/26	
			Jan-Jun	Jul-Dec
LEISURE MEASURES				
Consumer Ad Measures				
TV Reach	NA	13,739,722	NA	13,739,722
Print Reach	16,350,250	46,928,294	5,605,250	41,323,044
Digital Reach	214,497,272	118,672,163	-	118,672,163
Radio Reach	3,826,100	2,164,600	1,832,300	332,300
TV Gross Impressions	NA	33,891,993	NA	33,891,993
Print - Total Audited Circulation	4,671,500	13,408,084	1,601,500	11,806,584
Digital Gross Impressions - Total Audience	104,363,816	125,865,435	-	125,865,435
Radio Gross Impressions	9,450,467	5,346,562	4,525,781	820,781
Out of Home Gross Impressions	6,736,800	1,122,800	-	1,122,800
Public Relations Measures				
...Publicity Value				
Print	1,330,000	1,330,000	\$330,000	\$1,000,000
Online	3,699,600	3,809,600	\$1,599,600	\$2,210,000
Broadcast	10,180,000	13,500,000	\$3,200,000	\$10,300,000
...Number of Impressions				
Print	3,090,000	3,090,000	1,050,000	2,040,000
Online	18,350,000,000	26,000,000,000	6,600,000,000	19,400,000,000
Broadcast	274,000,000	352,000,000	74,000,000	278,000,000
Social Media Metrics				
INSTAGRAM				
Total Impressions Gained	3,556,536	5,581,536	1,036,536	4,545,000
Total Interactions Gained	265,440	315,440	97,440	218,000
Total Fan Count	148,200	149,700	141,200	149,700
Increase in Fans	12,800	14,300	5,600	8,700
Total Posts	215	240	95	145

4

Presentation on Results of the 2021 PGA Events and
Associated Activities.

Recommendation to Approve Final Year Funding for
CY2022 Events and Activities to the Full HTA Board



2021 PGA TOUR PARTNERSHIP

HTA MARKETING STANDING COMMITTEE MEETING

SEPTEMBER 29, 2021

PGA TOUR 2021 SUMMARY

		TOTALS
TOURNAMENT FUNDING		
SENTRY TOURNAMENT OF CHAMPIONS		
SONY OPEN IN HAWAI'I		
MITSUBISHI ELECTRIC CHAMPIONSHIP AT HUALĀLAI		
TOTAL		\$1,500,000
Visitor Development Funding (Marketing) (1)		\$501,489
PGA TOUR Royalties		\$150,932
Other		\$14,443
GROSS TOTAL		\$2,166,864
Minus Visitor Development Funding (Marketing)		-\$501,489
NET TOTAL (minus Marketing Fund)		\$1,665,375

1- Marketing Fund developed and administered but HVCB and billed back to the PGA TOUR

PGA TOUR 2021 RESULTS SUMMARY

EVENT	ATTENDANCE	COMMUNITY INVOLVEMENT & CHARITABLE DONATIONS (1)	MARKETING VALUE (2) (3)	PROGRAMMING HOURS (2) (3)	VISTOR SPENDING	ECONOMIC IMPACT (4) (1.81 MULTIPLIER)	TAX REVENUE GENERATED BY VISITOR SPENDING
SENTRY TOURNAMENT OF CHAMPIONS	1,000	\$526,760	\$11,236,352	81.5	\$2,116,997	\$3,831,021	\$247,108
SONY OPEN IN HAWAI'I	433	\$1,300,000	\$6,586,272	72.0	\$794,634	\$1,438,009	\$92,754
MITSUBISHI ELECTRIC CHAMPIONSHIP AT HUALĀLAI	400	\$185,000	\$1,333,308	18.0	\$846,799	\$1,532,408	\$98,843
		In-Kind Donations					
TOTAL	1,833	\$2,011,760	\$19,155,932	172 Hours	\$3,758,430	\$6,801,438	\$438,705

1- See Attachment 1 for specifics on Community Involvement and Charitable Donations

2- Based on 171.5 hours of programming on the Golf Channel and 2 hours on NBC (Sentry)

3- Tournament Marketing/Promotion (U.S. only)

4- Does not include visitors coming to the tournament not associated with the events.

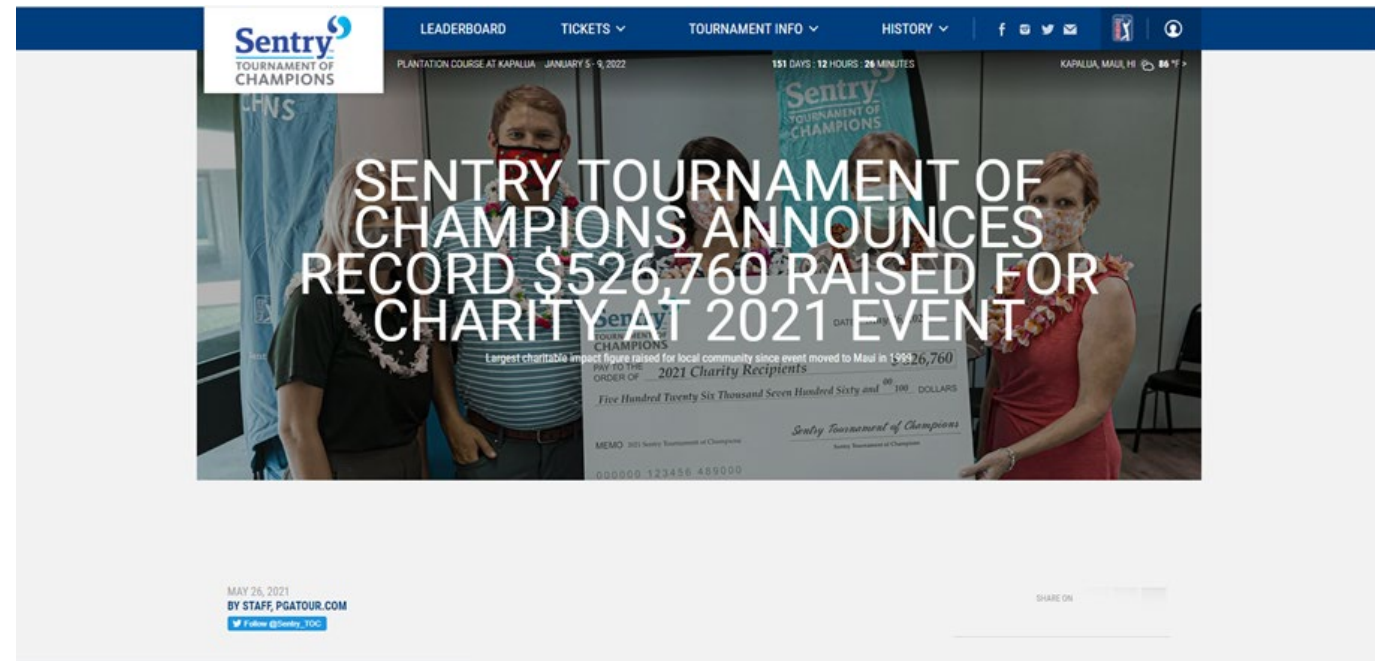
CHARITABLE DONATIONS SENTRY TOURNAMENT OF CHAMPIONS

2021 Sentry Tournament of Champions

Charitable Donations: \$526,760

Designated Beneficiaries:

- Boy Scouts of America
- Friends of the Children's Justice Center
- Hale Mākua Health Services
- J. Walter Cameron Center
- Ka Lima O Maui
- Lahainaluna High School Foundation
- Lahania Junior Golf



CHARITABLE DONATIONS SONY OPEN IN HAWAI'I



2021 GRANT RECIPIENTS

2021 Sony Open in Hawai'i

Charitable Donations: \$1,300,000

Designated Beneficiaries:

- Friends of Hawai'i Charities primarily raised funds through Sony Open in Hawai'i with tournament charity partner Harry and Jeanette Weinburg Foundation
- 134+ charities supported in 2021

AccesSurf
Adult Friends for Youth
After-School All-Stars Hawaii
Aina Momona
ALEA Bridge
Aloha Harvest
Aloha Independent Living Hawaii
Aloha Medical Mission
Alzheimer's Association Aloha Chapter
Anaina Hou Community Park
Armed Services YMCA of Hawaii
Assets School
Assistance Dogs of Hawaii
Assistance League Hawaii
Assistive Technology Resource Centers of Hawaii
Big Brothers Big Sisters Hawaii
Bobby Benson Center
Boys & Girls Club of Hawaii - Windward
Boys & Girls Club of the Big Island
Camp Agape Hawaii
Center for Tomorrow's Leaders
Child & Family Service
Common Grace
Compassion for Cancer Caregivers
Domestic Violence Action Center
EPIC Foundation
Family Hui Hawaii
Family Promise of Hawaii
Food Basket, Inc., The
Friends of Waialua Robotics, Inc.
Girl Scouts of Hawaii
Goodwill Hawaii
H U G S for Hawaii's Seriously Ill Children and Their Families
Habitat for Humanity Hawaii Island
Hale Opio Kauai, Inc.
Hale Kipa
Hale Mahaolu Adult Personal Care Program

Haloalauniukea Early Learning Center
Hawaii Bone Marrow Donor Registry
Hawaii'i Care Choices
Hawaii'i Children's Action Network
Hawaii Cord Blood Bank
Hawaii Fi-Do
Hawaii Foodbank, Inc.
Hawaii Foodbank, Inc. - Kauai
Hawaii Health & Harm Reduction Center
Hawaii Island Adult Care
Hawaii Japanese School, The
Hawaii Literacy
Hawaii Meals on Wheels
Hawaii Mothers' Milk, Inc.
Hawaii Public Health Association
Hawaii State Coalition Against Domestic Violence
Hawaii Tax Help
Hawaii VA Foundation
Hawaiian Humane Society
Healthy Mothers Healthy Babies Coalition of Hawaii
Helping Hands Hawaii
Hilei Aloha LLC
Hoola Na Pua
Hoa Aina o Makaha
HomeAid Hawaii
Honolulu Community Action Program, Inc.
Honolulu Habitat for Humanity
Ho omau Ke Ola, Inc.
HOPE Services Hawaii
HRA Educational Foundation
Hui o Hauula
I Ola Lahui, Inc.
IHS, The Institute for Human Services, Inc.
Imua Family Services
Jewish Community Services
K.E.L.I.I. Foundation

Kapiolani Medical Center for Women & Children
Kauai Independent Food Bank
Kukui Children's Foundation
Kupeke Ahupuaa
Lanai Community Health Center
Leadership in Disabilities & Achievement of Hawaii
Life's Bridges Hawaii Inc
Lunalilo Home
Make-A-Wish Hawaii
Malama Family Recovery Center
Malama I Na Keiki Hanai
Malama Pono Health Services
Maui Family Support Services, Inc.
Maui Farm, The
Maui Hui Malama
Mental Health Kokua
Mid-Pacific Institute
Na Hoaloha
Navian Hawaii (formerly Hospice Hawaii)
Nourish Kauai
Ohana Komputer
Pacific House of Mission
Pacific Region Baseball, Inc.
Pacific Survivor Center
Palolo Chinese Home
Pantry by Feeding Hawaii Together (The Pantry), The
Parents And Children Together PATCH
Pearlside Youth Outreach Community Center
Private Sector Hawaii, The
Project Vision Hawaii
Pua Foundation
Purple Maia Foundation
Read To Me International
Reading Is Fundamental
REHAB Foundation
Responsive Caregivers of Hawaii
River of Life Mission

Ronald McDonald House Charities Hawaii
Salvation Army Hawaiian & Pacific Islands Division, The
Samaritan Counseling Center Hawaii
SECOH
SEEQS: the School for Examining Essential Questions of Sustainability
Shriners Hospitals for Children-Honolulu
Special Olympics Hawaii
Surfing The Nations
Touch A Heart
U.S.VETS - Waianae
Ulu Ae Learning Center
United Cerebral Palsy Association of Hawaii
Waikiki Community Center
Waikiki Health
Waimanalo Health Center
Waipahu Aloha Club
West Hawaii Mediation Center
Women In Need (WIN Kauai)
Women in Need (WIN)
Yes Education
YWCA Oahu
YWCA of Kauai

... and other Hawaii charities



The Harry and Jeanette
Weinburg Foundation

CHARITABLE DONATIONS

MITSUBISHI ELECTRIC CHAMPIONSHIP AT HUALĀLAI

2021 Mitsubishi Electric Championship at Hualālai

Charitable Donations: \$185,500

Designated Beneficiaries:

- Rotary Club of Kona
- Daniel R. Sayre Foundation
- Big Island Junior Golf Association
- Hualālai 'Ohana Foundation



**MITSUBISHI
ELECTRIC**

CHAMPIONSHIP

at Hualalai

PGA TOUR 2020 SUMMARY

		TOTALS
TOURNAMENT FUNDING		
SENTRY TOURNAMENT OF CHAMPIONS		
SONY OPEN IN HAWAI'I		
MITSUBISHI ELECTRIC CHAMPIONSHIP AT HUALĀLAI		
TOTAL		\$1,500,000
Visitor Development Funding (Marketing) (1)		\$498,864
PGA TOUR Royalties		\$143,745
Other		\$13,755
GROSS TOTAL		\$2,156,364
Minus Visitor Development Funding (Marketing)		-\$498,864
NET TOTAL (minus Marketing Fund)		\$1,657,500

1- Marketing Fund developed and administered but HVCB and billed back to the PGA TOUR

PGA TOUR 2020 RESULTS SUMMARY

EVENT	ATTENDANCE	COMMUNITY INVOLVEMENT & CHARITABLE DONATIONS (1)	MARKETING VALUE (2) (3)	PROGRAMMING HOURS (2) (3)	VISTOR SPENDING	ECONOMIC IMPACT (4) (1.81 MULTIPLIER)	TAX REVENUE GENERATED BY VISITOR SPENDING
SENTRY TOURNAMENT OF CHAMPIONS	11,948	\$459,743	\$14,812,216	83.1	\$22,059,930	\$39,920,719	\$2,574,960
SONY OPEN IN HAWAI'I	18,945	\$1,200,000	\$7,661,742	45.7	\$36,612,295	\$66,255,384	\$4,273,594
MITSUBISHI ELECTRIC CHAMPIONSHIP AT HUALĀLAI	8,450	\$319,078	\$1,225,504	18.0	\$15,629,470	\$28,283,847	\$1,824,360
		In-Kind Donations					
TOTAL	39,343	\$1,978,821	\$23,699,462	147 Hours	\$74,301,694	\$134,459,950	\$8,672,914

- 1- See Attachment 1 for specifics on Community Involvement and Charitable Donations
- 2- Based on 147 hours of programming on the Golf Channel and 2 hours on NBC (Sentry)
- 3- Tournament Marketing/Promotion (U.S. only)
- 4- Does not include visitors coming to the tournament not associated with the events.

PGA TOUR 2022 SUMMARY

		TOTALS
TOURNAMENT FUNDING		
SENTRY TOURNAMENT OF CHAMPIONS		
SONY OPEN IN HAWAI'I		
 MITSUBISHI ELECTRIC CHAMPIONSHIP AT HUALĀLAI		
TOTAL		\$1,500,000
Visitor Development Fund (Marketing) (1)		\$504,245
PGA TOUR Royalties		\$158,479
Other		\$15,165
GROSS TOTAL		\$2,177,889
Minus Visitor Development Fund (Marketing)		-\$504,245
NET TOTAL (minus Marketing Fund)		\$1,673,644

1- Marketing Fund developed and administered but HVCB and billed back to the PGA TOUR

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Presentation on 2021 Activities Related to HTA's
Cruise Consultant and Recommendation to Approve
FY22 Funds to Support CY22 Activities to
the Full HTA Board

Access. Cruise

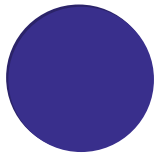
HAWAI'I TOURISM AUTHORITY

Hawai'i Tourism Authority
Hawai'i Cruise Industry Consultant Services
September 2021



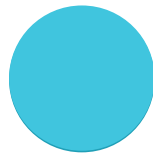
Benefits of Cruise

Cruise Lines traditionally book their itineraries 1 to 3 years in advance allowing Hawai'i to evaluate and manage the cruise capacity well in advance of FIT arrivals.



Sampling

Many cruisers are first-timers to Hawai'i. Cruise provides an introduction to Hawai'i through sampling



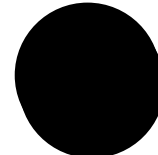
Sustainability

There is natural sustainability built into cruise through the existing infrastructure



Promotion & Ambassadors

Cruise lines promote Hawai'i and are excellent ambassadors



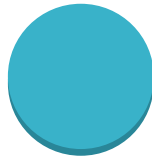
Small Footprint

Traditionally 30-80% of cruise guests take an organized ship tour. Others will arrange for private tours



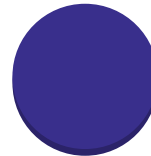
Primarily Shoulder Season

The high season for cruise lines in Hawai'i is during spring and fall when tourism is lower on the islands.



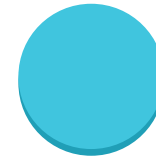
Education

Cruise lines help educate their guests on the Hawaiian culture and hire locals for onboard programming



Supports Local Community

Cruise lines support entrepreneurship and hiring local talent from Hawai'i to provide services



Distribution

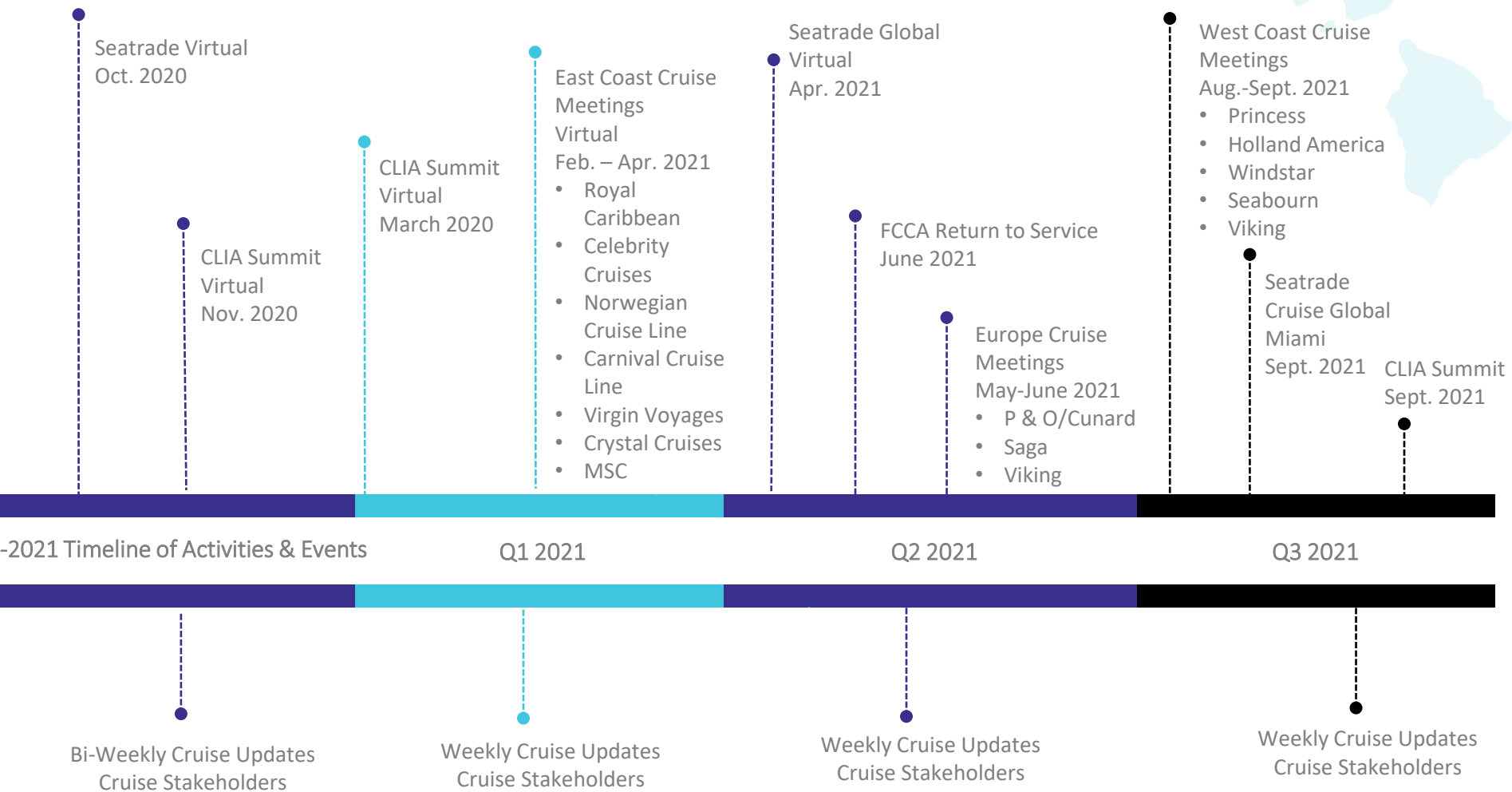
Cruise lines distribute guests among the major Hawaiian Islands





2020-2021 Timeline of Activities & Events

Individual touchpoints are continuous throughout the year through phone calls, video conferencing and events.





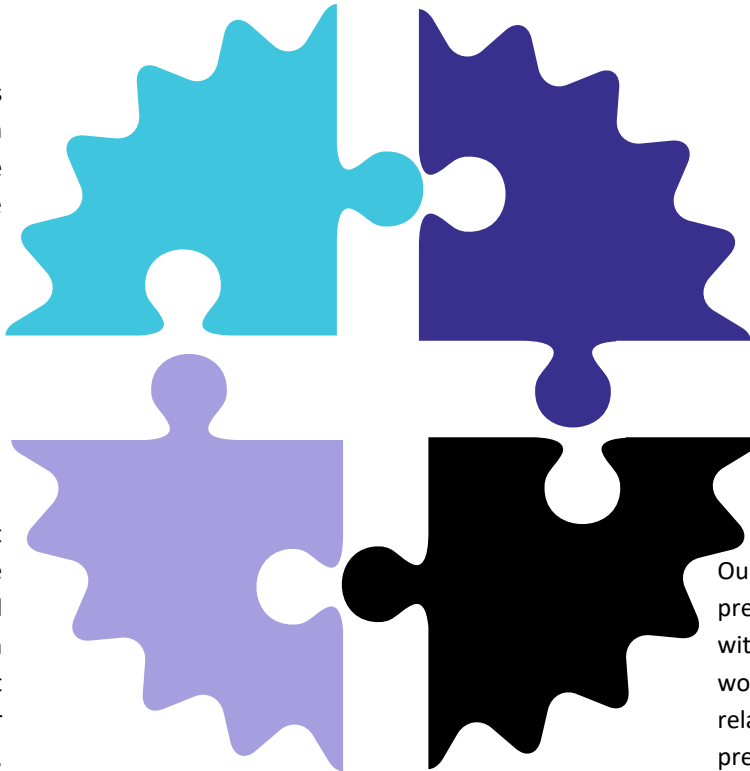
Target Markets

NCLA
 42% Cruise Capacity
 Considered Contemporary

NCLA's *Pride of America* traditionally supplies 40% of all cruise capacity to the Hawai'ian Islands. *Pride of America* is unique because she makes calls each week to each of the major ports (except Lāhainā).

Contemporary Brands
 18% Cruise Capacity
 60% if you include NCLA

The contemporary brands have the largest vessels at sea. These brands all frequent the Hawaiian Islands and Access Cruise will continue to nurture these relationships with the objective of maintaining the current cruise capacity while supporting their marketing and logistical needs. At any time, Access Cruise can shift their focus with the intent to attract more contemporary cruise capacity. This would be implemented at the direction of the HTA leadership team. Includes Royal Caribbean, Carnival Cruise Line & MSC Cruises.



Access Cruise has broken the cruise industry for Hawai'i into 4 key markets. Our recommendation is a combination of maintaining, fostering and growing specific markets. The targets are set with the guidance of the HTA leadership team.

Luxury & Specialty
 3% Cruise Capacity

The luxury and specialty brands are a small piece of cruising in Hawai'i. Vessels are small and guests pay premium prices. Tour penetration is high and special events are frequent. Programs focus on guest satisfaction and are destination driven with a desire for cultural immersion. This includes Crystal, Silversea, Seabourn, Viking, Saga, Fred Olsen, American Cruise Line & more.

Premium Brands
 37% Cruise Capacity

Our primary strategy would be to attract the premium brands which could be accommodated within the current port infrastructure. Our plan would put much more weight on fostering these relationships with the understanding that the premium brand vessels are traditionally smaller than their contemporary sisters, yet they offer repetitive itineraries. As with the contemporary brands, this can be an attraction or maintenance strategy, based on the direction of the HTA leadership. Includes Princess, Holland America, Celebrity & Disney



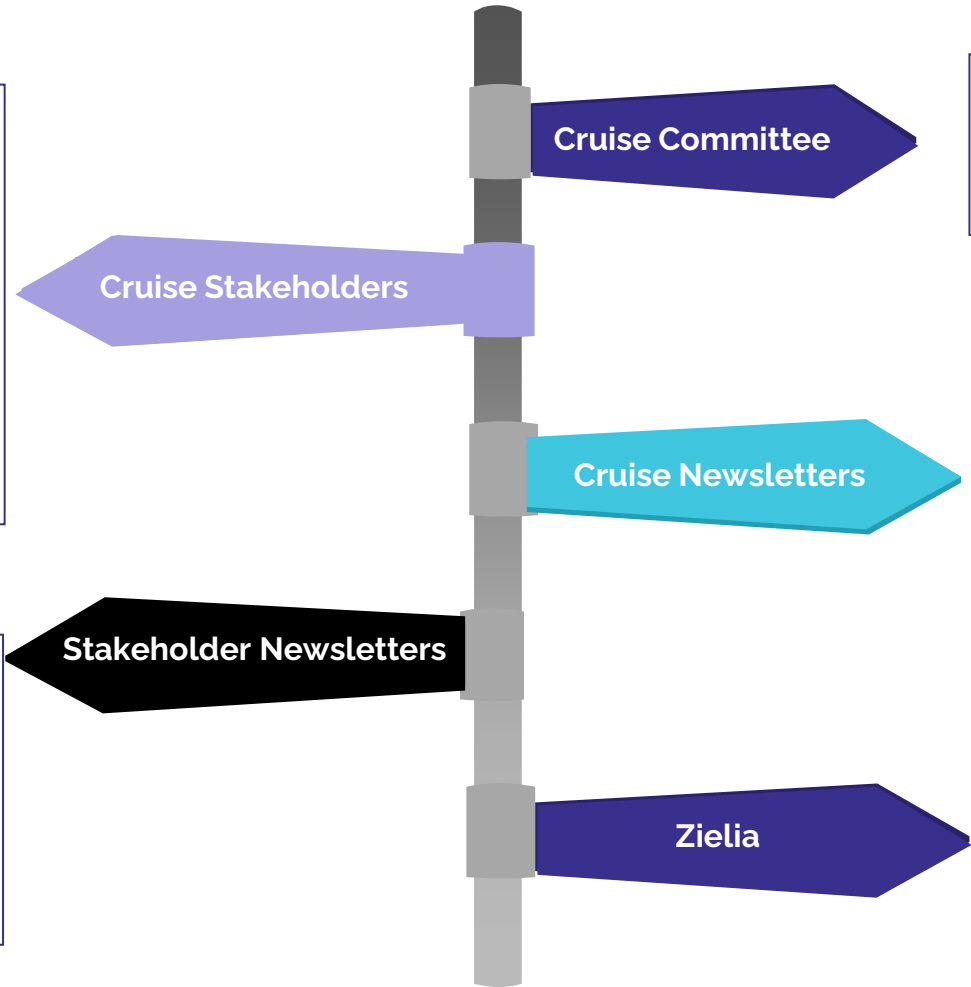


Cruise Initiatives

Access Cruise strives to provide value to the cruise lines and local cruise stakeholders. Communication process has been a key deliverable.

The Cruise Stakeholder Committee consists of the Cruise Committee as well as the Island Visitor Bureaus, tour operators, port agents and top attractions. Cruise Lines are also invited to attend. Information from the Cruise Committee meeting is shared in addition to top concerns on the islands as it relates to cruise. Meetings were suspended during the cruise shutdown. Traditionally they take place 3 times per year. Propose re-start as the cruise lines launch.

Local Stakeholder Newsletters were created to keep the local community informed of the initiatives of the cruise industry as it relates to Hawai'i. Information on new cruise brands visiting Hawai'i is also shared. These are distributed quarterly. During the shutdown weekly updates are sent to the local stakeholders.



The Cruise Committee was formed after the first fam trip and consists of the HTA, DOT, DLNR and CLIA. Meetings traditionally take place 3 times per year.

Cruise Newsletters are targeted to the cruise line executives and include news and initiatives from Hawai'i along with featured ports and attractions. Newsletters are traditionally distributed quarterly but were suspended during pandemic. Re-launch will correspond to re-start of cruise in Hawai'i.

Zielia is a cruise-centric standardized platform featuring information relevant to the cruise lines for each port including port details, top attractions and links to resources.





Communication Plan

Communication with the cruise executives are multi-faceted and ongoing



Tradeshows & Events

Access Cruise attends multiple events throughout the year including Seatrade Global, Seatrade Europe, multiple CLIA Summits, FCCA Conferences, Canada New England Conference and Cruise Europe.



In Office & Virtual Visits

Traditionally Access Cruise visits each of the major cruise line's offices at a minimum of once per year for formalized meetings. At times, this number is increased based on the initiatives outlined for each brand. During the pandemic we have conducted virtual meetings as cruise lines are not allowing visitors.



Newsletters

Newsletters are scheduled to be distributed quarterly to the cruise executives. News is meant to be timely and cruise-centric. The schedule may be adjusted as needs require.



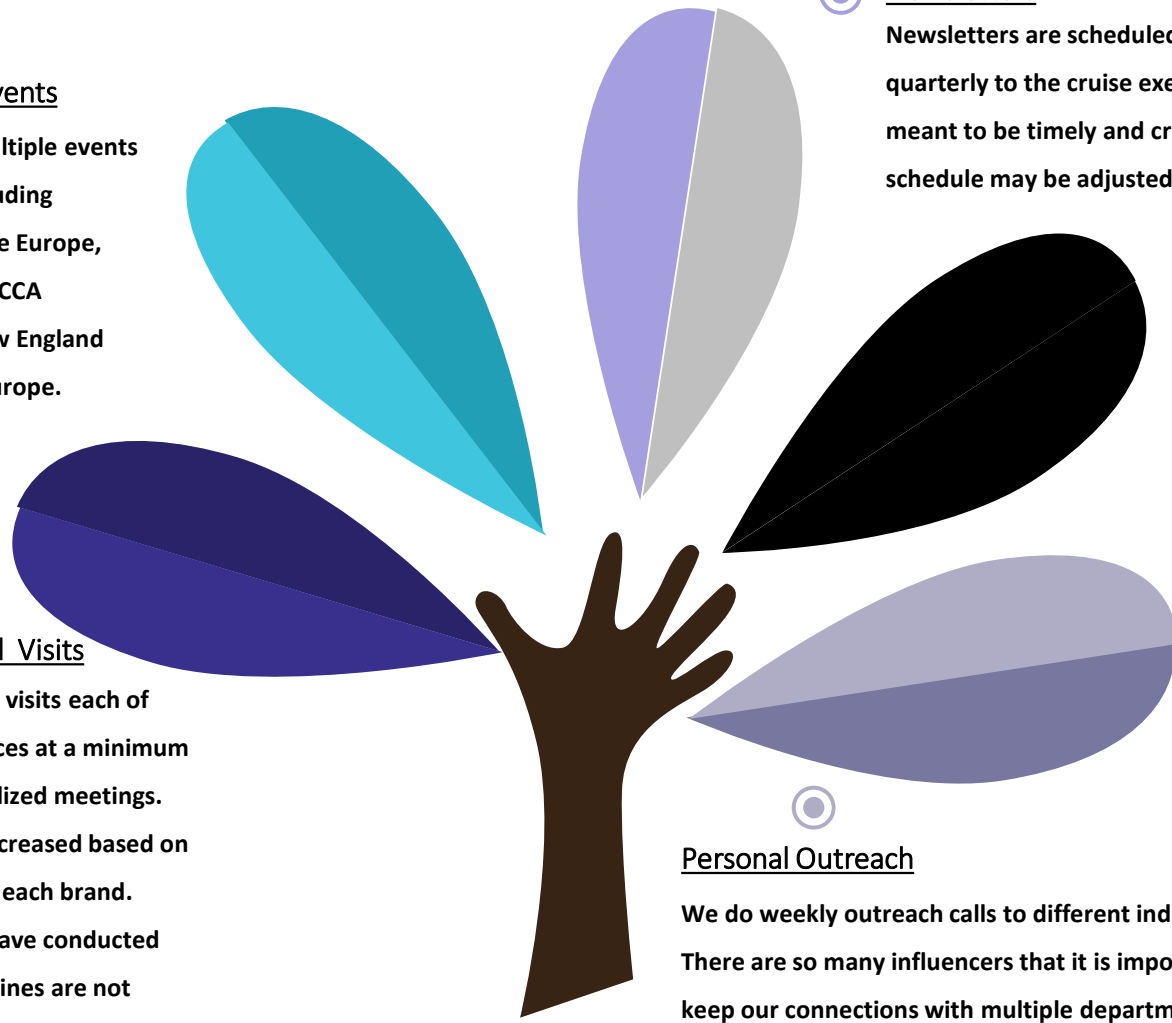
Cruise Stakeholder Calls

Cruise Line executives are invited and encouraged to participate in the quarterly cruise stakeholder calls. They gain great insight on Hawai'i and it is a pleasure for the local stakeholders to hear directly from the cruise lines. Intend to re-start these as cruising in Hawai'i resumes.



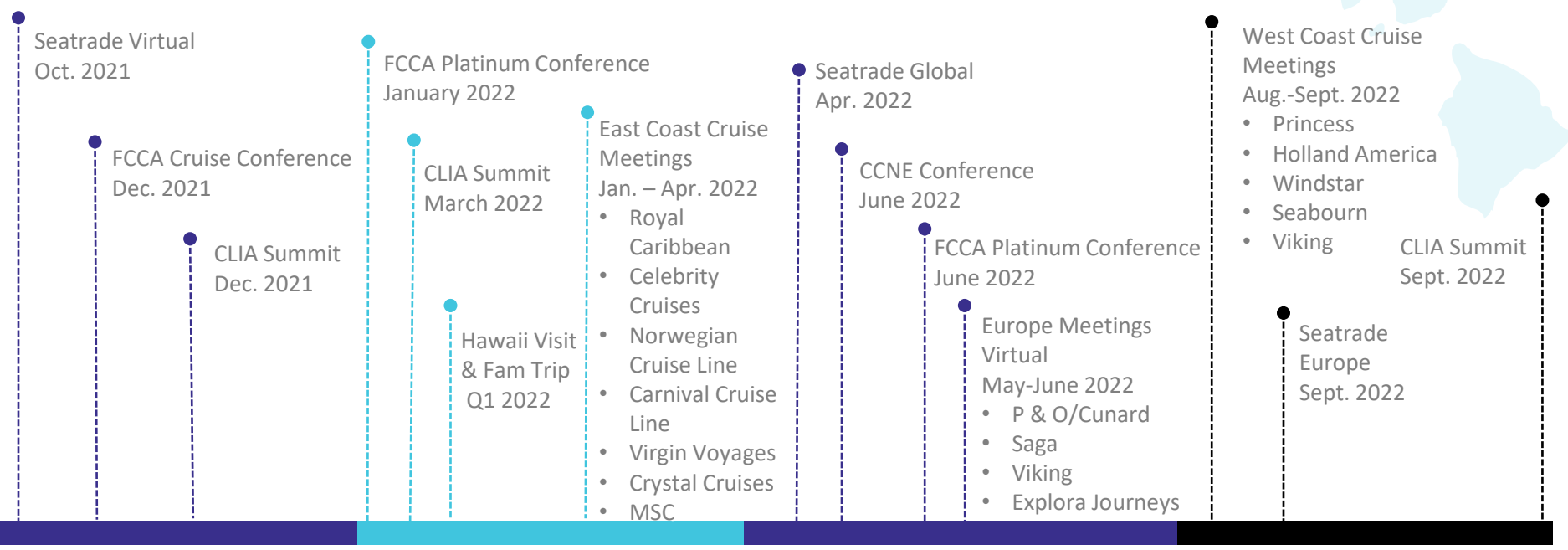
Personal Outreach

We do weekly outreach calls to different individuals. There are so many influencers that it is important to keep our connections with multiple departments fresh as priorities and perspectives may change.

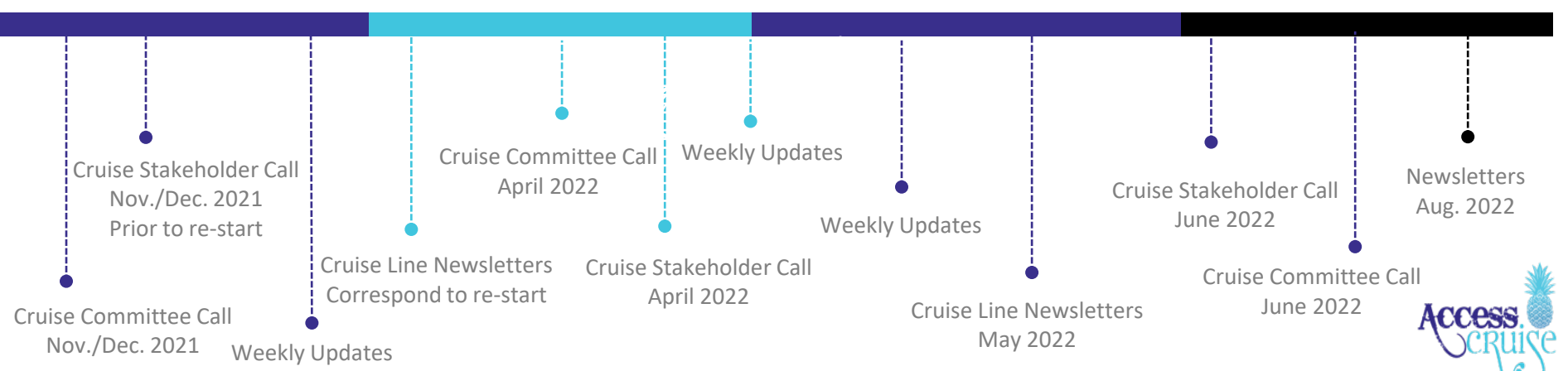


2021-2022 Proposed Timeline of Activities & Events

Individual touchpoints are continuous throughout the year through phone calls, video conferencing and events.



2 Proposed Timeline of Activities & Events



2021-2022 Proposed Budget Allocation

EXPENDITURES BY PROGRAM													
2021-2022													
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Year
	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget
Programs													
Travel	-	-		3,000		1,000	40,000	750	1,250	-	1,500	2,000	49,500
Conferences	-	-	500	-	-	-	1,000	-	-	-	-	1,000	2,500
Research				-				-					-
Programs Totals	-	-	500	3,000	-	1,000	41,000	750	1,250	-	1,500	3,000	52,000
Administrative													
Staffing & Office	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	15,000
Contractor Profit/Retainer	2,750	2,750	2,750	2,750	2,750	2,750	2,750	2,750	2,750	2,750	2,750	2,750	33,000
Administrative Totals	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	48,000
TOTAL	4,000	4,000	4,500	7,000	4,000	5,000	45,000	4,750	5,250	4,000	5,500	7,000	100,000

Budget Request

- Requesting additional \$50k for fam trip, conferences & travel
 - Conferences include Seatrade Miami, CLIA Europe, Seatrade Europe.
 - Travel for visit to Orlando (Disney), Seattle (Holland, Lindblad & Seabourn), LA (Viking & Princess) & NY (American Cruise Line)
 - Visit to Hawai'i corresponding with the re-start of cruise
 - "Cruise Executive Summit" FAM for cruise representatives

2021-2022	Year
	Budget
Total Travel & Conferences	\$ 52,000.00
Total Staffing & Office	\$ 15,000.00
Total Contractor Profit/Retainer	\$ 33,000.00
Total	\$ 100,000.00



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