



**HĀLĀWAI PAPA ALAKA'I KŪMAU
KE'ENA KULEANA HO'OKIPA O HAWAII**

**REGULAR BOARD MEETING
HAWAII TOURISM AUTHORITY**

**Po'ahā, 29 'Apelila 2021, 9:30 a.m.
Thursday, April 29, 2021 at 9:30 a.m.**

Kikowaena Hālāwai O Hawaii
Papahale 'Ehā | Lumi Nui C
1801 Alaākea Kalākaua
Honolulu, Hawaii 96815

Hawaii Convention Center
Fourth Floor | Ballroom C
1801 Kalākaua Avenue
Honolulu, Hawaii 96815

'O ka ho'opakele i ke ola o ka lehulehu ka makakoho nui. E maliu ana ke ke'ena i ke kuhikuhina a nā loea no ke kū kōwā, ka uhi maka, me nā koina pili olakino 'ē a'e. Koi 'ia ke komo i ka uhi maka a me ke kū kōwā ma nā ke'ena a ma nā hālāwai.

Koi 'ia ka hō'oiā i kou olakino maika'i ma mua o ke komo i ke Kikowaena Hālāwai O Hawaii ma ka 'īpuka o waena o ka hale ho'okū ka'a. E pāpā 'ia ke komo 'ana o ke kanaka nona ka piwa ma luna a'e o ka 100.4°F. Inā 'ōma'ima'i 'oe, e 'olu'olu, e 'imi i ke kauka nāna e kōkua iā 'oe.

The safety of the public is of the utmost importance. Pursuant to expert guidance, HTA will be following strict physical distancing, facial coverings, and other health-related requirements. Face coverings and physical distancing are required in HTA offices and meetings.

Entrance to the Hawaii Convention Center requires a health screening at the center parking garage entrance. Persons with a temperature of over 100.4°F will be denied entry. If you are not feeling well, we urge you to contact a healthcare provider.

**Papa Kumumana'o
AGENDA**

1. **Ho'omaka A Pule**
Call to Order and Pule
2. **Mahalo I Nā Lālā Papa Alaka'i E Ha'alele Ana**
Mahalo to HTA's Outgoing Board Members: *Rick Fried, Kelly Sanders, Ku'uipo Kumukahi* for their Service to the Hawaii Tourism Authority



3. *Welina I Nā Lālā Papa Alaka'i Hou*
Welcome to HTA's New Board Members: *Dylan Ching, Sigmund Zane* for terms ending 06-30-2024; *Keith Downing* for a term ending 06-30-2022; and reappointment of *David Arakawa* and *Sherry Menor-McNamara* for terms ending 06-20-2024
4. *Āpono I Ka Mo'ō'ōlelo Hālāwai*
Approval of Minutes of the March 25, 2021 Board Meeting
5. *Hō'ike Lālā*
Report of Permitted Interactions at an Informational Meeting or Presentation Not Organized by the Board Under HRS section 92-2.5(c)
6. *Hō'ike A Ka Luna Ho'okele*
Report of the CEO Relating to Staff's Implementation of HTA's Programs During March 2021:
 - Major Market Management including Destination Marketing Management Services, Global Meetings, Conventions and Incentives (MCI) Program Management Services, Responsible Tourism, Support of State COVID-19 Mitigation Efforts
7. *Hō'ike 'Ikepili Noi'i 'Oihana Ho'omāka'ika'i*
Presentation and Discussion of Current Market Insights and Conditions in Hawai'i and Key Major Hawai'i Tourism Markets, Including the United States, Japan, Canada, Oceania and Cruise
8. *Hō'ike, Kūkākūkā A Ho'oholo No Nā Mo'okālā*
Presentation, Discussion and Action on HTA's Financial Reports for March 2021
9. *Hō'ike A Ka Hui Noi'i Loiloi Mo'okālā*
Report of the *Budgetary Review Investigative Committee* of their meeting held on April 16, 2021
10. *Hō'ike A Ka Hui Noi'i Launa Aupuni A 'Aha'ōlelo*
Report of the *Legislative and Governmental Affairs Investigative Committee* of their meeting held on Wednesday, April 21, 2021
11. *Hō'ike A Ke Kōmike Hokona Kūmau No Ke Kūkākūkā A Ho'oholo*
Report of the *Marketing Standing Committee* with the Committee's Recommendations to Support Various Marketing Proposals, for Discussion and Action by the Board



12. *Hāpai, Kūkākūkā, A 'Āpono I Ka Luna Ho'omalū*

Nominations, Selection and Appointment of the Chair of the Hawaii Tourism Authority

13. *Ho'oku'u*

Adjournment

*** *'Aha Ho'okō: Ua hiki i ka Papa Alaka'i ke mālama i kekahi hālāwai kūhelu i kū i ka Hawaii 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 ko Hawaii 'ano, he wahi i kipa mau 'ia e nā malihini.*

*** **Executive Session:** The Board may conduct an executive session closed to the public pursuant to Hawaii 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 Hawaii's competitive advantage as a visitor destination.

Kono 'ia ka lehulehu e komo 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 a i 'ole ma o ke kelepa'i. Inā pono ke kōkua ma muli o kekahi kīnānā, e ho'omaopopo aku iā Carole Hagihara (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 attend the public meeting and provide written testimony on any agenda item. Written testimony may also be provided by submitting the testimony prior to the meeting by email to carole@gohta.net or by facsimile transmission. Any person requiring an auxiliary aid/service or other accommodation due to a disability, please contact Carole Hagihara (973-2289 or carole@gohta.net) no later than 3 days prior to the meeting so arrangements can be made.

Agenda Item

4

Approval of Minutes of the
March 25, 2021 Board Meeting



REGULAR BOARD MEETING
HAWAII TOURISM AUTHORITY
Thursday, March 25, 2021 at 9:30 am
Virtual Meeting

MINUTES OF REGULAR BOARD MEETING

MEMBERS PRESENT:

Richard Fried (Chair), George Kam, Kelly Sanders, Micah Alameda, David Arakawa, Fred Atkins, Daniel Chun, Kyoko Kimura, Ku'uipo Kumukahi, Sherry Menor McNamara, Benjamin Rafter, and Kimi Yuen

MEMBER NOT PRESENT:

HTA STAFF PRESENT:

John De Fries, Keith Regan, Pattie Herman, Marc Togashi, Jennifer Chun, Kalani Ka'anā'anā

GUESTS:

Representative Richard Onishi, MG. Kenneth Hara, Adjutant General, David Pettinger, Barbara Ankersmit, Jay Talwar, Eric Takahata, John Monahan

LEGAL COUNSEL:

Gregg Kinkley

1. Call to Order and Pule:

Chair Richard Fried called the meeting to order at 9:31 a.m. Keith Regan, HTA Chief Administrative Officer, provided instructions to the general public with regard to submitting testimony. Mr. Regan confirmed the attendance of the Board by roll call. Kalani Ka'anā'anā, HTA Director of Hawaiian Cultural Affairs & Natural Resources, opened the meeting with an oli composed by Lili'u which talks about persisting your deeply held love for your native sands of Hawai'i.

2. Approval of Minutes of the February 25, 2021 Board Meeting:

Chair Fried requested a motion to approve the February 25, 2021 Board Meeting. George

Kam made a motion and it was seconded by Kelly Sanders, and unanimously approved.

3. Report of Permitted Interactions at an Informational Meeting or Presentation Not Organized by the Board Under HRS section 92-2.5(c):

Chair Fried asked whether there were any interactions since the January meeting, and there were none. Chair Fried asked whether there were any interactions, informational meetings or presentations to report, and there were none.

4. Report of the CEO Relating to Staff's Implementation of HTA's Programs During February 2021

Chair Fried recognized John De Fries, HTA's CEO, to present his report. Mr. De Fries welcomed Chair Onishi, Rep. Sayama, the legislators present and the BOD. He acknowledged the board committees who have been engaged with the DMAP process. He noted that they've been preparing for tourism opening to scale and have discussions with HVCB and HOTA into strengthening the messaging into mask wearing, social distancing and hand washing for both visitors and locals. He said that they conducted two webinars in conjunction with DOH on visitor industry workforce vaccination. He acknowledged HOTA for committing to helping anyone in the visitor industry to facilitate the proper submission of their information to the DOH. He acknowledged the departing Deputy Attorney General Krishna Jayaram for all of his help, especially in the formation of safe travels program. He also acknowledged Gen. Hara for intervening to make certain determinations on the LPGA event for the HTA's branding efforts and thanked Dir. McCartney of DBED for his support in HTA's efforts. He turned the floor to Keith Regan.

Mr. Regan reported that they made changes to the formatting of the March 2021 report for easier reading and that the executive summary provides a very good overview of some of the activities. He noted that their Natural Resources team has been working on two major projects related to tour guide certification and licensure and user fees and reservation systems for the Island's busiest sites. He said that the Hawaiian Culture team has been busy with closing out 2020 Kūkulu Ola awardees, repairs of the Merrie Monarch and 'Iolani Palace, newspaper digitization for Hawaiian language and more. He noted that Ms. Anderson has been working on the action items in the Hawai'i Island and Kaua'i's DMAP, as well as activities for the O'ahu DMAP. He noted that Ms. Herman and her team has been working with branding and ensuring that all of the GMT budgets are lined up, ready and controlled based on the current market conditions. He also acknowledged Ms. Chun and her work on research. He said that they try to engage the county mayors every month to hold the hospitality industry updates and they were able to have it in Kaua'i and Maui County last February, which enabled the members of the industry to ask and air their concerns to

the mayor and his team.

Ms. Kimura asked if Maui will have another meeting in March due to the cancellation because of the flood. Mr. Regan affirmed.

5. Update from Major General Kenneth Hara, Adjutant General for the State of Hawai'i on the COVID-19 Testing, Vaccination and Safe Travels Program

Chair Fried acknowledged MG Kenneth Hara, Adjutant General for the State of Hawai'i Department Defense, to give an update. Gen. Hara said that he is also the Director of the office of Homeland Security and that as an Incident Commander, he is not in charge of vaccinations but just supports the Department of Health. He shared the Response Guiding Principles and that the top priority is saving lives and preventing human suffering and stressed the importance of taking personal responsibility. He noted that that the goal is to get the economy going again and get back to the new accepted norm. He added that the pandemic control includes prevention, detection, containment and treatment which would inform policy and their recommendations to the executive branch of the state and the county.

Gen. Hara reported that in order to open the economy safely, the idea of the Safe Travels Hawai'i came in with the concepts of establishing trusted travel partners, a 72-hour pretest prior to departure, development of digital travel forms and questionnaire, traveler screening upon arrival, mandatory 10-day self-quarantine for those who doesn't meet the requirements, and performance of compliance checks and enforcement. He noted that Hawai'i is now in Phase 1C with the vaccine and that once this phase is completed, about 500,000 residents would have been vaccinated. He said that 78% of the vaccines they received have been administered with a 24% inoculation.

Gen. Hara reported that there have been issues and concerns with large events being organized and with reluctance to vaccination. He noted that 40% to 50% of the population is willing to get vaccinated and that getting 75% to 80% of the population will lead to the new accepted norm. He said that the CDC had no vaccination travel guidance which is why the Department of Health has been hesitant to use vaccines as a reason to exempt travelers. He added that the next steps would be to get rid of inter-island travel quarantine restriction (but hesitated with the increasing COVID cases), use the vaccine exemption for trans-pacific continental U.S. travelers, and then the trans-pacific international travelers, and lastly, terminating Safe Travels Hawai'i when herd immunity is reached and infection, hospitalization and deaths are down to near zero.

Chair Fried asked an estimate as to when would there be a vaccine passport and at what stage would be the inter-island travel exemptions. Gen. Hara responded that he's thinking somewhere about the May-June timeframe where phase 1 is completed and phase 2 starts. He noted that for the inter-island exemption, he thinks that the mayors will feel comfortable if Maui is down to single digits with COVID-19.

Chair Fried asked if there'd be trouble getting to 75% to 80% herd immunity. He responded that the number of people willing to get vaccinated will increase with the help of leaders spread the word about the safety of the vaccines and the importance of getting herd immunity.

Chair Fried asked about the odds of meeting in person for more than 10 people. Gen. Hara responded that the organizers would have to coordinate with their County with their proposal containing risk mitigating measures and the county will send it to the State level and then to the Department of Health for their review. Once approved, it will be sent back down to the County for their approval.

Mr. Atkins asked if he has an approximate number of cases where there'd be a concern if it would impact the hospitals on all islands. Gen. Hara said that right about 80% statewide capacity is when they need to start making decisions.

Rep. Onishi asked the percentages of pre-testing for visitors and residents traveling to Hawai'i. Gen. Hara responded that he'll talk to ETS and will get back with the answer. Mr. Chun said that it can be viewed on the portal and looking at the data as of yesterday, 60% of the statewide residents are doing the COVID-19 test vs. 85% of visitors which is for both inter-island and overseas.

Mr. Atkins asked if the locals without a pretest take the test at the airport. Rep. Hara responded that they don't do any testing. Mr. Atkins asked the percentage that the hospital capacity of the state is in at the moment. He responded that it is way below 20% or 30% and that the state is doing really good.

Rep. Onishi asked who is controlling the testing partnership. Rep. Hara responded that it's a combination of the Attorney General's office and one from the governor's office but Dr. Char approves the memorandum of understanding.

Mr. Chun asked of the timeline for the pilot of Clear and CommonPass. Gen. Hara responded that in about a month, they will be able to pilot it but they've been slowly approving additional labs for domestic travel

Mr. Regan read a question from the public asking if all of Hawai'i's airports have good signage about masks being mandatory and if they can get DOT airports' support for that. Gen. Hara responded that they have all the airports put out signage and encouraged the public's feedback on areas that can be improved with the Safe Travels.

6. Presentation and Discussion of Current Market Insights and Conditions in Hawai'i and Key Major Hawai'i Tourism Markets, Including the United States, Japan, Canada, Oceania and Cruise

Chair Fried acknowledged Jennifer Chun to provide an update. Ms. Chun reported that about 235,000 visitors came on February generating \$385 million which is equivalent to \$151 PPPD. She noted that this is lower than last year at \$202 PPPD with about 247,000 visitors at any given time in the state vs. about 91,000 visitors this year. She said that the Department of Taxation preliminarily collected \$17 million TAT in February, and \$73.5 million for Fiscal 2021 Year to Date, which is down 83.9% from last year. She said that for February, air service is about half the number of last year with the domestic and international seats down about 35.8% and 93% respectively. She noted that they have started adding flights to their air service schedule report as requested by Dir. McCartney. She added that occupancy for Hawai'i hotels were 30% at \$259 rate and 50% at \$242 rate for vacation rentals. She said that the number of vacation rental supply is much lower than the hotel supply.

Ms. Chun reported that they have two new research reports, namely COVID-19 Impact on U.S. Avid Travelers, which can be seen on HTA website and YouGov Destination Index Trends for the Responsible Travelers Segment which started with the U.S. market and will add other markets as data becomes available.

7. Discussion on the Resident Sentiment Survey

Chair Fried acknowledged Ms. Jennifer Chun to provide an update. Ms. Chun reported that the approved questionnaire for the August 2020 survey was included in her report and that it contains demographic, favorability and tracking questions among others.

Mr. Rafter asked how often the survey should be done. Ms. Chun responded that originally, it was done every five years and recently, they're doing it annually. She said that with the ongoing situation, doing it more frequently will provide timely information which will inform decisions on tourism. She suggested that the phone and online version of the survey be done at least biannually or quarterly and then annually for focus groups.

Chair Fried asked the cost of the annual survey. Ms. Chun responded that with the addition of COVID questions and expansion of sample size for certain markets, the cost is \$47,000 for the past survey. Chair Fried said that the cost of focus groups on the islands will be discussed for they are very helpful. Mr. Rafter agreed with the focus group idea and proposed for a biannual survey. He said that they can work on creating the budget for it and suggested that they work on the questions because some of them don't convey the trade-off between no tourism and the advantages of tourism.

Mr. Atkins asked if the word tourism could be replaced by sustainable tourism in the two questions to determine any shift in community sentiment with the works being done by the tourism industry to address the native Hawaiian language and culture. Ms. Chun responded that in prior surveys, it had a section about HTA's work and service satisfaction but it was taken out thinking that it was more important to focus on general tourism. She noted that questions that inform what tourism did and what HTA is doing are valuable and would be great to be reincorporated back into the survey.

Mr. Atkins asked if they can ask for the residents' suggestions as to how tourism can be made better vs. asking close ended questions. Ms. Chun responded that previous questions about it didn't yield valuable information so they decided to drop it, but it could be added back in for the next round.

Ms. Kumukahi suggested that surveys should be grounded in the community and that good surveys can be yielded with the lateral help of county departments and with working as a cohesive community.

Ms. Kimura observed that mixing positive and negative questions are confusing and suggested that the questions be geared towards positive tourism. Ms. Chun responded that they will check if changing the questions will affect some of the tracking and if they could just lose tracking on some of them.

Mr. Chun agreed doing the survey biannually and with the focus group to enable residents' feedback and help move resident sentiment in a more positive direction. He added that with the findings, HTA acknowledges the voice of the residents and can inform them of the solutions that are being taken.

Mr. De Fries said that it's important for the questions to be framed around the fact that Hawai'i's future presumes vibrancy in the tourism industry and in the four pillars. Ms. Chun asked if the Board would like the survey to be fielded again before fiscal year.

Mr. Rafter asked for a motion to approve an increase in the frequency of resident sentiment survey to twice a year and do one more for the fiscal year. Mr. Arakawa seconded and it was unanimously approved.

Rep. Onishi asked if there are other processes regarding how the survey is being reviewed other than getting the Chief Executive's approval. Ms. Chun said that it was the process and is open to changing that process. Rep. Onishi said that the Board should address the process of reviewing the survey. Rep. Onishi asked for the basis of the tracking questions and if traffic is one of them. Ms. Chun responded that the resident sentiment survey was initially fielded by DBEDT in 1988 and some questions track back to that point. She said that they could probably change that question to something else. Chair Fried said that he agrees with Rep. Onishi's point about the traffic question and considers not even having as it starts a negative bias regardless of the truth. Ms. Chun responded that if they decide to eliminate questions as has been done in the past, then it's possible for as the needs change, then the survey can change.

Ms. Herman agreed that the location is important for the traffic survey. Ms. Chun agreed and added that they have increased samples in the recent survey to identify where the issues are for each part of the state and can do more with a bigger budget.

8. Presentation of the Hawai'i Tourism Authority's Visitor Satisfaction & Activity Report (VSAT) Special COVID Survey

Chair Fried acknowledged David Pettinger and Barbara Ankersmit of Anthology Research to give an update. Ms. Ankersmit reported that the survey is a spot in time survey which was conducted between March 8 and 10 among Hawai'i visitors coming from the Mainland between February 12 and 28 with a sample size of 515 at a 95% level of confidence.

Mr. Pettinger reported that all visitors that arrived by that time were aware of pre-testing protocols required for coming to the state. He noted that 85% had a smooth pre-testing process compared to 79% on December to January. He said that there's a significant increase with the idea of high cost of testing and a significant drop from 18% to 5% on communication and testing issues with trusted partners. He added that about half of visitors say that the three-day window for test is unreasonable. He noted that all visitors were aware that there would be limited tourism activities.

Ms. Ankersmit reported that 82% of the respondents had an excellent visit and that a 7.27 visitor satisfaction rating is not bad with the restrictions and COVID in place. She noted that East Coast visitors had more problems with the COVID restrictions, finding a trusted partner

and with getting the test before coming. She added that when asked what needed to change for people giving a 6 or less visitor satisfaction score to get them to give it an 8, they said that the COVID mandates and rules are confusing and more beaches and attractions, fewer COVID restrictions among others and wanted businesses to stay open longer with 3% not liking the quarantine requirement. She said that 78% are likely to recommend for friends and family to come to Hawai'i in the next six months while 90% for when the quarantine is lifted. She added that the major reason for not recommending is the closure of businesses and attractions which went up rather than down. She noted that 92% said that the trip met or exceeded their expectations and that 72% intends to visit again regardless of the pre-visit requirements with more responses coming from females.

Mr. Pettinger reported that 20% said that the low COVID-19 cases is a very important reason to choose as Hawai'i as a destination and that a third said it has no bearing at all on their decision to choose Hawai'i. He noted that there's still a sense that COVID 19 is a serious concern but it has dropped slightly to 66%. He said that 83% intend to get if it meant they can come back to the island. He added that only 12% choose not to be vaccinated and that 86% of them won't change their mind even with the incentive of the vaccine card.

Mr. Pettinger reported that 90% of visitors from the U.S. West say that mandates are required in their hometowns compared to 71% from the U.S. East. He said that 90% believe they are following the mask wearing mandates all or most of the time and 83% believe that they're following the social distancing guidelines while visiting the state. He added that 69% believe they're avoiding social gatherings all or most of the time.

Ms. Ankersmit reported that people find information mostly from the safe travels website, then family and friends and gohawaii.co. She noted that there were more visitors in the 50 to 64-year old bracket and not as many in the 65 plus. She said that 48% of the respondents visited the island of Maui and 54% of O'ahu which is opposite of last year with more people visiting O'ahu. She added that 88% visited one island and that people who came are with some money and very highly educated.

9. Presentation, Discussion and Action on HTA's Financial Reports for February 2021

Chair Fried recognized Keith Regan to provide an update. Mr. Regan reported that the HTA did not receive any disbursements from TAT or any revenue since May 2020. He noted that the total expenditures for February are \$218,000 which is \$174,000 of that from approved FY 2021 budget and \$43,000 of that is from prior fiscal years. He noted that they received \$281,000 in investment revenue, which created a nominal net increase for the tourism special funds to about \$63,000 from DAGS. He noted that

encumbrance is at \$1400 for the month. He noted that HTA's total standing encumbrances which include prior years are approximately \$40.2 million. He noted that the only contract they have for February was just a supplemental and no cost extension so it's a not a very busy month as it relates to contracts because a lot of the activities took place in December, 2020 for fiscal year 2021

Mr. Regan reported that the tourism special fund has approximately \$64.2 million in cash and investments. He added that the remaining balance of the tourism special fund excluding the tourism and emergency special fund is about \$59.7 million

Ms. Kimura asked how much encumbrances were cancelled this fiscal year and if there will be no carryovers for 2022. Mr. Regan reported that they have about \$600,000 refunds on contracts but will go back with the specifics later. Mr. I got to go back and take a look at that dollar amount to get specifics. Mr. Togashi said that going back to FY 2020 when covid-19 had originally hit, they identified about \$30 million dollars of contracts and weren't able to cancel by the end of last fiscal year and that around \$14.6 million spilled into this fiscal year. Mr. Regan said that they're anticipating about \$12 million in carryover.

Ms. Kimura asked if all of the marketing of the convention center is included in the HVCB budget. Mr. Togashi said that currently, nothing is being funded out of the FY 2021 budget for calendar year 2021 out of the Convention Center Enterprise special fund.

Chair Fried asked for a motion to approve the February budget as presented. Mr. Kam made a motion and seconded by Mr. Atkins. The budget was unanimously approved.

10. Report of the Budgetary Review Investigative Committee of their meeting held on March 16, 2021

Chair Fried acknowledged Mr. Rafter to give his report. Mr. Rafter reported that they continue to address two items which is the timing and gateways to start wrapping up on spend. He noted that they have identified four tiers for spending and that the next steps is to translate it in terms of percentage and when resources and advertising campaigns and spends are going to be ramped up with the basic premise of flights returning, number of flights needed, percentage of load factor and types of quarantine restrictions being lifted.

Mr. Rafter reported that they looked at the general buckets of spend and on how to

shape spend to be targeting tourists with the motivations behind the four pillars. He said that the budget will be submitted in May and approved in June and that the next update is to solidify the four pillars and to outline how spending is started into markets as they come back. He explained that if the quarantine upon returning home would be lifted and additional flights would be announced, they would work it back to how much time they need to re-launch the market and work in tiers into increasing spending to 50% or 60% until eventually getting back to full market spending.

11. Report of the Legislative and Governmental Affairs Investigative Committee of their meetings held on March 3, 2021 and March 11, 2021

Chair Fried acknowledged George Kam to provide an update. Mr. Kam reported that they reiterated Mr. De Fries' role with the Board's support to share with all of the stakeholders the importance of HTA and tourism as a key driver for economic recovery and community's health and safety. He noted that the team is continuing to meet with the House and Senate leadership in regards to supporting the restoration of full funding and HTA's contribution to the state economy and that HTA strives to prove it's worth to the legislature and earn their confidence the board's responsibility to ensure that funds are allocated strategically to maximize returns and to continue to support all four pillars to ensure a balanced recovery.

12. Update Relating to the 2021 Legislative Session and Related Bills Relevant to the Hawai'i Tourism Authority

Chair Fried acknowledged George Kam to give his report. Mr. Kam reported that they are currently tracking 47 bills and have submitted testimony on eight bills this past month and that all of the board members have the testimonies.

Mr. Regan added that there were 100 plus individual measures that impacted the industry or some related things they're working on that they have been tracking and monitoring. He said that those bills are on the second lateral so that if those bills don't make it today, those bills will come off of HTA's tracking. He noted that HB 1297, the Central Services Bill, will basically take out a 5% fee of the tourism special fund and convention center enterprise special fund (about \$4.7 million) to the HTA to support Central Services. He added and that they will continue to oppose it every step of the way. He noted that for the budget bill, they've allocated \$71.4 million in art funds for HTA and will continue to analyze that because the worksheets just came out yesterday. He said that they are also monitoring the TAT bill modifying the waterfall

Because of a provision of authority to the counties to charge TAT with however much they think because they've been removed from the waterfall.

13. Report of the Marketing Standing Committee with the Committee's Recommendations to Support Various Marketing Proposals, for Discussion and Action by the Board

Chair Fried acknowledged Kelly Sanders to give his report. Mr. Sanders reported that the meeting focused on three main areas with one being with the current travel pace to Hawai'i with travels arriving from the U.S. only. He noted that there has been a marked improvement in overall pace forward-looking at Q2 to Q4. He added that there are no real travels coming from any of the major market areas such as Japan, Korea, China and Australia.

Mr. Sanders said that the GMTs from Australia and Oceania gave an update on their recovery plan and that most countries are really working through the vaccine first and to get herd immunity or close to it to expect their borders to open. He added that Korea and Australia will not see travel recovery until October and November that they will be ramping up programs and marketing efforts starting Q3 of this year. He noted that a lot of the international destinations will go back to using travel agents as a safety net. He said that the other area is on MCI and that they are starting to see more enquiries into Q4 through 2022 and 2023 with sports travel and weddings as the major inquiries for overall group travel.

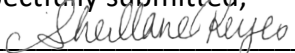
Chair Fried noted that the GM of the recently rebranded Mauna Lani Resort was surprised but pleased that they're going to run the hotel at 50% in April and 80% in May at a very modest \$900 room rack rate. Mr. Sanders said overall luxury travel continues to do very well for Maui and the big islands.

Chair Fried asked if there are any public testimonies and there was none.

14. Adjournment:

The meeting adjourned at 12:37 pm.

Respectfully submitted,



Sheillane Reyes

Recorder

Agenda Item

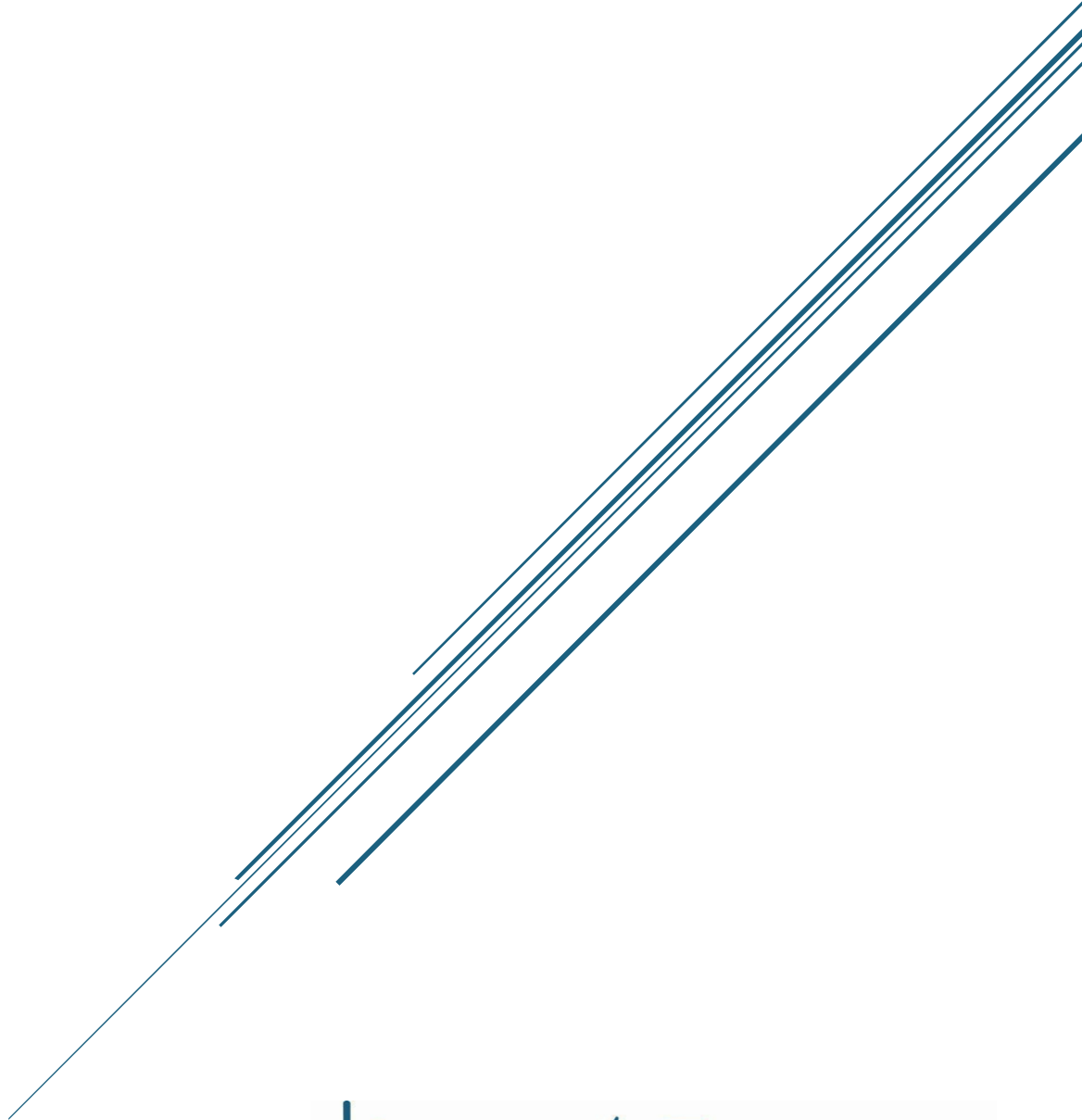
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Report of the CEO Relating to Staff's
Implementation of HTA's Programs During
March 2021:

-Major Market Management Including Destination
Marketing Management Services, Global Meetings,
Conventions and Incentives (MCI) Program
Management Services, Responsible Tourism,
Support of State COVID-19 Mitigation Efforts

HTA CEO REPORT

APRIL 2021



EXECUTIVE SUMMARY

Each month, the Hawai'i Tourism Authority (HTA) provides this report as a resource to the Board and the public to better understand the activities and actions taken by the team in support of the organization's overall mission. HTA's 2025 Tourism Strategic Plan and its four pillars (Natural Resources, Hawaiian Culture, Community, and Brand Marketing), serves as a guide to the team in the various matters worked on during March 2021. Overall, this report provides insight into the actions conducted by the staff to implement the HTA budget previously approved by the Board.

The natural resources team began the month by representing HTA in the County of Hawai'i Mayor's Sustainability Summit. The team continues its efforts on the other two major projects of focus identified – tour guide certification and licensure, as well as indicating best practices and implementation for user fees and reservation systems for the islands' busiest sites.

March 26 marked the birthday of Prince Jonah Kūhiō Kalaniana'ole. Although traditional parades and activities statewide were not held this year due to the global COVID-19 pandemic, HTA staff worked to honor the prince's legacy through their work in Hawaiian culture. The Hawaiian culture team continues to work on the upcoming May Day event as well as final contract evaluations for 2020 Kūkulu Ola awardees. Staff also has under its care projects which include the Merrie Monarch Festival Digitization, 'Iolani Palace Repairs, Hawaiian Language Newspaper Digitization, Festival of Pacific Arts and Culture (FestPAC) and the Center for Hawaiian Music and Dance.

The O'ahu Destination Management Action Plan (DMAP) planning process has begun with the O'ahu DMAP Steering Committee meeting twice in March. The Maui Nui DMAP was released to the public on March 4. The *Hawaii AgriBusiness Guidebook: Starting an Agri-Tourism Operation* was made available to the public in March as well as a call for submissions for the Hawai'i Farm Trails App. The community enrichment team also continues to work on closing out the remaining 2020 Community Enrichment Program contracts.

In March the branding team had to say goodbye to Mr. Shibata, general manager of All Nippon Airways, as his tenure in Hawai'i was up and he planned to return to Japan. Mr. Noguchi will take Mr. Shibata's place in addition to maintaining his present position as operations manager. The Taiwan Trusted Testing Partners process was completed. Leadership team members visited Daniel K. Inouye International Airport to see the efficiencies of the Safe Travels process. Discussions regarding participation in the IPW Travel Trade Show took place. HTA will participate as many of the key travel partners will be there. While HTA's attendance will be downsized, visibility will be strong.

HTA's Tourism Research Division (TRD) published the February 2021 Visitor Statistics press release and monthly reports, air seat outlook for April – June 2021, February 2021 Hawai'i Hotel Report, and February 2021 Vacation Rental Performance Report. In addition, TRD published weekly Destination Brand Index reports and Travel Agency Booking Trend reports and provided support for the HTA Daily Tourism Brief. Two new reports utilizing YouGov data were launched in March: the weekly Destination Brand Index – Responsible Traveler Segment and Coronavirus Impact Report.

I. NATURAL RESOURCES PILLAR

1. Aloha 'Āina (Natural Resources) Program

HTA program staff are in the process of checking in final reports and deliverables from Aloha 'Āina programs. There are 34 projects that have concluded the 2020 cycle despite the rough year. Most projects were completed at the end of calendar year 2020. However, a few were granted no-cost extensions. Staff has struggled with securing compliant CVCs from contractors which is delaying contract close outs and final payment processing.

2. DLNR Partnership

Nā Ala Hele staff continue to implement various portions of the project to enhance the resident and visitor experience statewide across 128 trails spanning approximately 855 miles. This is a FY 2020 project that is expected to conclude at the end of 2021. Program leader Mike Millay left the program in mid-March and HTA staff continue to work with the Department of Land and Natural Resources (DLNR) leadership.

3. Park Reservation and User Fee Program

HTA staff have completed meetings with the DLNR and others to understand their planning in regards to park user fees as well as reservation systems to be implemented statewide. DLNR shared their phased implementation of new reservation websites and increased fees. The first park will be Diamond Head State Monument. HTA staff recommends to not continue forward with further planning in this area and move the funds budgeted for this program to another priority area. Staff also recommends restarting its work in identifying ways to support an accelerated rollout of a scalable system to support DLNR in its implementation. One area of concern is the consideration of the visitor experience in booking reservations and the need to have a centralized, convenient system statewide.

4. Tour Guide Certification and Licensure

HTA staff has finalized a work plan for this project and is in the process of executing a letter of intent and eventual contract to be executed. HTA has identified the University of Hawai'i (UH) at Mānoa School of Travel Industry Management (TIM) to study what is currently on the books and what exists, for a better understanding of what other jurisdictions are doing as best practices. The HTA team believes there is an opportunity to study this now for implementation in future years. Staff anticipates having a final report by the end of calendar year 2021.

II. HAWAIIAN CULTURE PILLAR

1. *Kūkulu Ola Program*

HTA program staff are in the process of checking in final reports and deliverables from Kūkulu Ola programs. There are 33 projects that have concluded the 2020 cycle despite the rough year. Most projects were completed at the end of calendar year 2020. However, a few were granted no-cost extensions. Similar CVC issues for these contractors is also delaying final contract closeouts and final payments.

2. *Native Hawaiian Hospitality Association*

HTA and the Native Hawaiian Hospitality Association (NaHHA) continue to build stronger ties between the Hawaiian community and the tourism industry. From July 2020 to present (halfway through the contract year) NaHHA conducted 29 trainings for more than 1,100 participants. NaHHA also provided three recorded trainings in the Canada market as requested. In addition, NaHHA continues to support HTA staff with Festival of Pacific Arts and Culture (FestPAC) planning and coordination.

3. *Native Hawaiian Festivals and Events*

13TH FESTIVAL OF PACIFIC ARTS AND CULTURE (FESTPAC)

The commission for the 13th FestPAC continues its planning and HTA staff are supporting efforts around marketing, public relations and communications for the festival. The festival commission is now focused on the development of the programming schedule of practices to be offered as part of the festival. Further, the commission is monitoring SB 696 SD1 HD1 which is needed to extend the life of the commission through August 31, 2025. The bill will be heard by the conference committee in April.

MERRIE MONARCH FESTIVAL AND DIGITIZATION PROJECT

Event organizers are engaged in planning for the 2021 Merrie Monarch Festival to be held in Hilo, Hawai'i. June has been confirmed as the month for the event but the broadcast will be aired later in the first week of July. HTA has allocated funding to support the event. The digitization work is ongoing and expected to be completed by June 2022. The work of digitizing the collection has been slowed due to the COVID-19 restrictions as well as the tedious nature of the work.

HAWAIIAN AIRLINES MAY DAY: MĀKA'ĪKA'Ī 2021

Promotions have begun for this year's May Day event highlighting HTA's work with community organizations like Kauluakalana through the Aloha 'Āina program and the 'Āina Aloha Economic Futures hui. HTA is the presenting sponsor of the annual Lei Day celebration that will premiere on Friday, May 1, 2021, statewide at 6:00 p.m. on KGMB and 7:00 p.m. on KFVE, and worldwide via Facebook Live by Kāhuli Leo Le'a and various partnering organizations. The show will also be shared as a ticketed event in Japan. The program will be re-broadcasted on May 3, on KFVE at 8:00 p.m.

Kāhuli Leo Le‘a will produce “Hawaiian Airlines May Day 2021: Māka‘ika‘i,” a virtual concert that continues the annual Lei Day tradition by the Brothers Cazimero. Keauhou, the 17-time Nā Hōkū Hanohano award-winning group, returns to headline the concert experience with special guests, Robert Cazimero and his Hālau Nā Kamalei o Līlīehua, Manu Boyd, the Ha‘eha‘e girls, Ka Lā ‘Ōnohi Mai o Ha‘eha‘e under the direction of nā kumu hula Tracie and Keawe Lopes, Hālau Mōhala ‘Īlima under the direction of kumu hula Māpuana de Silva, and host, Billy V. Echoing last year’s presentation, the concert experience will return in a virtual format, maintaining the collective commitment to re-imagine treasured events and gatherings amid COVID-19. Inspired by the ‘Āina Aloha Economic Futures (AAEF) declaration and Huliau Statement, the program will take viewers beyond the aesthetic pleasures of song, dance and storytelling. The program supports an ‘Āina Aloha Economic Future by having viewers experience māka‘ika‘i, visits to endeared places shared by kama‘āina, those deeply rooted in these places. Enjoying mele, hula, and mo‘olelo—in the ways only kama‘āina can share—promotes an economic future of Hawai‘i that finds success only through aloha ‘āina, a deep and abiding love for the places and people of Hawai‘i.

4. Center for Hawaiian Music and Dance

During the 2021 legislative session, HTA tracked several bills which would affect the Center for Hawaiian Music and Dance (CHMD). HB321 HD1 and SB926 repeal the allocation of TAT funds to the CHMD. HB1165 and SB916 SD1 amend the language that allowed for the development and operations of the Center for Hawaiian Music and Dance and leaves its location undetermined. The only remaining bill in Conference is HB 321. HTA staff has paused exploration of a digital/virtual exhibit component to begin with, as clarity is obtained on what will allow the state to meet the challenges faced with the economic recovery from COVID-19.

5. ‘Ōlelo Hawai‘i – He Aupuni Palapala: Preserving and Digitizing the Hawaiian Language Newspapers

In response to COVID-19 and the various county and state restrictions, HTA staff have finalized a supplemental contract with Bishop Museum that allows more time for work to be completed on “He Aupuni Palapala: Preserving and Digitizing the Hawaiian Language Newspapers.” The goal of this project is to digitize all Hawaiian language newspapers (in all repositories and personal collections). The State of Hawai‘i benefits to support programs that preserve and increase access to rare and historical Hawaiian language newspapers to further the understanding and knowledge contained therein. By making readily available these important documents for education, research, and preservation, the project will provide the state with a completely unique and robust resource for Hawaiian language learners and workers to strengthen ‘ōlelo Hawai‘i. HTA staff were also informed that the scanner, a critical missing tool, needed to advance this work has been ordered. Bishop Museum staff and partner organizations have begun indexing the collections across repositories. Lastly, the project received some positive coverage in local media recently as well.

6. 'Iolani Palace Repairs

HTA staff continue to monitor the work for the project that began in August 2020 with no updates at this time. The work is behind schedule for completion as there were some challenges with the timeline due to the pandemic and materials that were damaged in transit needed to be reordered and reshipped. The construction schedule is subject to further changes based on the contractors' assessments.

III. COMMUNITY PILLAR

1. Community

COMMUNITY-BASED TOURISM PROGRAM – DESTINATION MANAGEMENT ACTION PLANS (DMAPS)

The Maui Nui DMAP was released on March 4. Below are links to some of the articles that highlighted the Maui Nui DMAP:

- Maui Now (March 4, 2021): [Hawai'i Tourism Authority Published Visitor Management Plan for Maui Nui](#)
- Pacific Business News (March 5, 2021): [Hawai'i Tourism Authority Releases Destination Management Plan for Maui](#)
- The Maui News (March 13, 2021): [Tourism Plan Focuses on Quality, Not Quantity](#)

Staff worked on finalizing the Hawai'i Island DMAP with the graphic artist, and the expected release to the public is early April. Staff met with DLNR to discuss the Hawai'i Island DMAP actions. Staff also virtually met with the County of Kaua'i and Kaua'i Visitors Bureau to identify DMAP actions to allocate FY 2021 funds towards. The O'ahu DMAP planning process has begun with two Steering Committee meetings held in March.

AGRITOURISM

To support the continued development of agritourism in Hawai'i, HTA partnered with the University of Hawai'i's GoFarm Hawai'i, Hawai'i Agritourism Association of Hawai'i, and O'ahu Resource Conservation & Development Council to update the [Hawaii AgriBusiness Guidebook: Starting an Agri-Tourism Operation](#). The guidebook was designed to provide aspiring agritourism businesses an overview of essential training information, as well as share helpful tips for farmers.

HTA issued an announcement via its database and social media for agritourism businesses to be featured on the Hawai'i Farm Trails app. The free mobile app, slated to launch on Thursday, April 22, is a platform that enables users to connect, experience and support Hawai'i's agriculture. From exploring farms and ranches to purchasing products or contributing to the planting of trees, the app provides an opportunity for residents and visitors to discover numerous agritourism experiences.

COMMUNITY ENRICHMENT PROGRAM (CEP)

HTA staff continues to work with the remaining 2020 CEP contractors to process final invoices and close out 2020 contracts. There are 7 CEP contracts that are open.

MĀLAMA PROGRAM

The Aloha+ Mālama Mandate, signed by the HTA team, expresses the commitment "to navigating towards a better future" through "our love for Hawai'i [and] our collective ancestors and descendants." A key component of the Aloha+ Mālama Mandate is the perpetuation of the values

of mālama. In alignment with this commitment, HTA staff will be introducing a new program that focuses on Mālama as a rallying statement to engage the community in efforts that will focus on caring for families and friends during this time of crisis.

The Mālama Program will include a project that encourages the use of masks to prevent the spread of COVID-19 in communities statewide. Ideas include the creation of a Hawai'i-specific cloth mask, identification of renowned individuals to promote the concept of mālama and mask usage, and more. In addition, the Mālama Program will include working with clergy and the community to develop a Mālama Sunday campaign to encourage the community to come together and mālama each other to lift each other's spirits and provide hope. The program will continue to grow and expand as new and exciting ways to further engage residents and visitors are identified.

HOSPITALITY INDUSTRY UPDATES (COUNTY)

HTA recognized the need to connect stakeholders from both the public and private sectors in order to improve awareness and build an understanding of the current state of the visitor industry related to COVID-19. As such, HTA staff coordinates with each county to identify a day and time that is most convenient for the respective mayor to participate in a hosted meeting with government officials, association leaders, contract partners and the visitor industry.

During the month of March, HTA hosted the following update:

- Hawai'i County Hospitality Industry Update
 - March 10, 2021 at 2:00 p.m.

2. Communication and Outreach

NEWS RELEASES/REPORTS ISSUED

- HTA Publishes Community-Based Tourism Management Plan for Maui Nui (March 4)
- Report: HTA Hawai'i Hotel Performance Report for February 2021 (March 22)
- Report: HTA Hawai'i Vacation Rental Performance Report for February 2021 (March 24)
- News Release: Hawai'i Visitor Statistics Released for February 2021 (March 25)
- HTA Releases Results from Special Visitor COVID-19 Study (March 30)

NEWS BUREAU

- Interviews and press conferences: 4
- Local and national media relations: 58

HTA'S DESTINATION MANAGEMENT ACTION PLANS

- Assisted with communications efforts – edited the Maui Nui DMAP and Hawai'i Island DMAP
- Pitched Maui Nui DMAP to Colleen Uechi, The Maui News, and Catherine Cluett Pactol, The Moloka'i Dispatch

- Pitched Hawai'i Island DMAP to Stephanie Salmons, Hawai'i Tribune-Herald
- Drafted email template for outreach to community groups and organizations for sharing of the completed DMAPs

COMMUNITY INITIATIVES AND PUBLIC OUTREACH

- Community liaison and communications: 25
- Drafted and distributed e-blast on Constant Contact regarding the Hawai'i Farm Trails mobile app
- Drafted and distributed e-blast on Constant Contact regarding the Hawai'i AgriBusiness Guidebook on Starting an Agri-Tourism Operation
- Drafted and distributed e-blast on ClimbHI's 9th annual LEI (Leadership, Exploration, Inspiration) program
- Drafted and distributed e-blast on Hawaiian Airlines May Day 2021

CRISIS COMMUNICATIONS

- Responses regarding travel to Hawai'i: 53
- International inquiries: 3
- Daily email updates on the COVID-19 situation: Updates #1581-#1649
- Daily updates to HTA's website – COVID-19 alerts page
- Detailed notes on Gov. Ige's and City & County of Honolulu Mayor Blangiardi's press conferences
- HTA's daily briefer
- Participated in the state's Joint Information Center
- Coordinated and attended a meeting with CommonPass
- Attended tour of Daniel K. International Airport and observed the screening process for incoming travelers
- Sent updates on the tsunami watch
- Sent updates on the Haiku evacuations because of the dam topping

HTA'S SOCIAL MEDIA

Paid Social Media on Facebook

- Post of the published community-based Destination Management Action Plan for Maui Nui. Flight dates from March 4 – March 11. Total Reach 12,212 | Total Reactions 1,074
- Post of the Visitor Satisfaction and Activity Study for March 2021. Flight dates from March 31 – April 7. Total Reach 42,070 | Total Reactions 10,649

Facebook

- Number of followers: 16,668 (+24.26%)
- Engagement rate: -92.89%
- Daily page engaged users: 2,692
- Posts: 40

Instagram

- Number of followers: 4,290 (+48.08%)
- Engagement rate: +386.36%
- Number of engagements: 321
- Posts: 10

Twitter

- Number of followers: 37,355 (+1.78%)
- Engagement rate: +73.63%
- Number of engagements: 59
- Posts: 5

LEGISLATIVE

- Wrote draft testimony on behalf of HTA and John De Fries (JDF):
 - HB1297, HD1
 - HB1298
 - HB1299
 - SB1320
 - HB200
 - SCR75
 - HB1286, HD2
 - SCR71
 - SCR236/SR196
 - HB321, HD1
 - SB696, SD1
 - HCR44/HR35
 - HB1297, HD2, Proposed SD1
 - HB321, HD1, Proposed SD1
 - HB200, HD1
 - SCR175/SR140
 - SCR259/SR218
 - HB1297, SD1
 - SB696, SD1
 - SB266, SD2, HD1
 - HB1276, HD1, SD1
- Attended HTA's Legislative team strategy meetings
- Transcribed the House floor session for HB825, HD2 regarding the DLIR using the Hawai'i Convention Center
- Wrote draft letters regarding HB825, HD2 on behalf of JDF to: Rep. Adrian Tam, Rep. Sylvia Luke, Rep. Ty Cullen, Rep. Linda Ichiyama, Rep. Aaron Johanson

INTERNAL COMMUNICATIONS

- Communications with state and county departments: 21
- Edited HTA reports/press releases/documents
- Provided talking points to HTA's staff
- Communicated important updates to HVCB and HLTA
- Wrote and submitted a quote on behalf of JDF for Gov. Ige's press release regarding the Taiwan Trusted Testing Partners

3. *Safety and Security*

VISITOR ASSISTANCE PROGRAM (VAP)

HTA currently has four contracts, one in each county, to provide funding support for the Visitor Assistance Program. These contracts are:

- CON 17031 (S6) – Visitor Aloha Society of Hawai'i (O'ahu) with total funding of \$370,000 and a contract expiration date of 4/1/2021. The first payment of \$333,000 was processed on April 17, 2020. The final invoice of \$37,000 was processed on March 3, 2021. Supplemental #5 for the COVID-19 Flight Assistance Program was executed to fund the program \$33,962 for the months of November through mid-March 2021. On December 30, 2020, Supplemental #6 was executed to encumber funds for three-fourths of calendar year 2021 in the amount of \$277,500.
- CON 17032 (S5) – VASHI – Island of Hawai'i VAP with total funding of \$170,000 and a contract expiration date of 4/1/2021. The first payment of \$153,000 was processed on April 17, 2020. The final invoice of \$17,000 was processed on March 9, 2021. On December 30, 2020, Supplemental #5 was executed to encumber funds for three-fourths of calendar year 2021 in the amount of \$127,500.
- CON 17033 (S4) – VASK – Kaua'i VAP with total funding of \$55,000 and a contract expiration date of 4/1/2021. The first payment of \$49,500 was processed on May 6, 2020. The final invoice of \$5,500 was processed on March 5, 2021. On December 30, 2020, Supplemental #4 was executed to encumber funds for three-fourths of calendar year 2021 in the amount of \$41,250.
- CON 17034 (S4) – MVCB – Maui VAP with total funding of \$55,000 and a contract expiration date of 4/1/2021. The first payment of \$49,500 was processed on May 6, 2020. The final invoice of \$5,500 was due on February 15, 2021. On December 30, 2020, Supplemental #4 was executed to encumber funds for three-fourths of calendar year 2021 in the amount of \$41,250.

During the month of March:

- Maui County's program handled 9 cases and helped 11 visitors (year-to-date: 24 cases/34 visitors). This included visitors from Indiana, US West and US East markets. The Maui County

program team also attends meetings including at the EOC, Police Commission, Airport, VOAD and car rental committee meetings. The industry assisted with \$3,500 of in-kind contributions.

- Hawai'i County's program handled 27 cases and provided assistance to 62 visitors (year-to-date: 56 cases/145 visitors). This included visitors from the Pacific Northwest, Ohio, Utah, and Russia.
- City and County of Honolulu's program handled 74 cases and helped 153 visitors (year-to-date: 140 cases/433 visitors). This included visitors from American Samoa, California, and Georgia.
- Kaua'i County's program handled 8 cases and provided assistance to 23 visitors (year-to-date: 19 cases/46 visitors).

SNORKEL SAFETY STUDY

HTA executed a contract (CON 19171) with the Hawaiian Lifeguard Association (HLA) for \$131,000 to conduct a snorkel safety study with an expiration date of 6/30/2021. The purpose of this two-year study is to formally assess the causes and risk factors in snorkel-related fatalities and near fatal drownings. HLA will collect and analyze data, conduct scientific research, conduct surveys and interviews, and consult with experts in the appropriate fields. The State of Hawai'i Department of Health and the City and County of Honolulu lifeguards are collaborating on the study. HLA has collected information on the cases of snorkeling-related accidents. The second of three payments has been issued. HTA is waiting for the final report and invoice (\$31,000.00), which is due per the contract in April 2021.

IV. BRAND MARKETING PILLAR

1. Major Market Area (MMA) Contracts

Due to the COVID-19 pandemic, the 2020 contracts for Europe and Southeast Asia markets were canceled, effective April 17, 2020. On April 9, RFP 21-04 Europe MMA was canceled due to changing fiscal priorities in response to the COVID-19 crisis. In addition, due to 2021 budget cuts, the contracts for China and Taiwan were terminated for 2021.

The Oceania contract is already working under a fixed cost. Qantas currently plans to open its operations in July 2021. However, that may shift to the fourth quarter due to their government's orders. HTA plans to resume branding and marketing in August 2021 if the schedule stays intact. Australia's borders are still closed with strict safety protocols in place. The bubble travel concept that Australia had been talking about with New Zealand still has not been executed. However, they are currently working on a bubble travel concept with the Cook Islands.

All other GMT contracts will be on fixed costs only through June except for HVCB, which will be on fixed costs through April and start targeted marketing in May. The other GMT members will start up targeted marketing efforts in July due to what is happening in their respective countries. However, should anything change, everyone will remain fluid. At this time, flights are operational and coming in to Hawai'i from the U.S. mainland, Canada, Japan and Korea. In March many more meetings regarding fixed costs took place for possibilities of further fixed cost reductions.

HVCB created a list of "What's Open" and posted it on gohawaii.com.

Regarding China and Taiwan, there are presently no talks occurring about the starting of operations by China Eastern Airlines from China to Hawai'i, nor China Airlines from Taiwan to Hawai'i. In 2019, while per person, per day spending from these markets was good, their total expenditures were relatively low, \$244,270,000 and \$58,020,000 respectively. Thus, the decision was made to terminate contracts for these markets.

2. MMA Marketing Plans

The Market Management team is ensuring that the focus of "Regenerative Tourism" is thread through the marketing plans from HTA's Global Marketing Team. This action runs parallel to HTA's brand marketing, and thus Hawai'i will be set up well to welcome the next generation of targeted travelers – mindful travelers – who are already conscious of and respect destinations that care for their natural resources. The GMT continues to share images of Hawai'i's natural beauty and wide-open spaces in their respective markets to keep Hawai'i top of mind.

Due to COVID-19 and Governor Ige's emergency proclamations, HTA is currently not receiving TAT funding. In July 2020 the FY 2021 budget for Branding was approved by the Board at \$28,590,675 (-44.5%

year-over-year). However, in December 2020, due to the intensity of the coronavirus situation and the development of the variant coronavirus, the decision was made to make further cuts to HTA's budget. HTA staff adjusted the Branding budget down to \$27,217,511. The markets impacted by the decreases were the U.S. (-\$685,707), Japan (-\$500,000), Korea (-\$100,000) and Oceania (-\$100,000), as well as Travel (-\$40,000). Canada received an increase of \$26,180 as their TTP process was successfully processed and flight operations are running for both Air Canada and WestJet Airlines.

The team refreshed the branding section of HTA's website and gave it a new look.

3. Industry Partner Meetings

HTA continues to communicate with its industry partners by providing COVID-19 related information daily and conducting Zoom meetings. HTA staff is discussing the possibility of doing a virtual Spring Forum and the several different platforms that can be used, including Zoom.

In March, some of the industry updates the team received include the following:

- The O'ahu booking pace is lagging behind the booking paces of the other islands. However, the cancellations are stabilizing.
- Maui hotel occupancies are doing the best across the Hawaiian Islands.
- Expedia sold Classic Vacations to NAJAFI Inc.
- Amway Korea came through for a site inspection. This incentive group is for the Diamond Level salespeople and is aiming to host the event in April 2022. In 2001 they brought 5,000 attendees to Hawai'i.
- Wholesalers and travel agents are having issues with booking rental cars. There are not enough in the islands, thus the rental cost has increased to an unreasonable amount. Many wholesalers and travel agents are considering taking car rentals out of their package programs.
- Most hotels have reduced their cancellations to no penalty charge up to 24 hours prior to arrival to be traveler friendly.

4. Communication

HTA continues to engage with industry partners. The airlines are assisting with reminding all out-of-state passengers about Hawai'i's 10-day quarantine and the pre-test program. HTA has been providing industry partners with up-to-date information from the Department of Health, press conferences by the governor and county mayors, cruise line industry updates, daily arrivals, the Joint Information Center's Daily News Digest and HTA's Daily Briefer.

HTA staff continues to hold bi-weekly meetings with the Global Marketing Team, receiving information on in-country activities, Hawai'i messaging and flight plans into Hawai'i if they had not yet started. In addition, discussions also included marketing campaigns, educational programs, Mālama-centric programs and key measures. Pattie Herman (PH) continues the monthly Zoom call with John Reyes,

senior vice president and chief MCI sales officer of HVCB, to discuss group activities and possible opportunities both in citywide and single-property groups.

The Regular Standing Marketing Committee Meeting was held on March 24 and topics that were discussed or presented included presentations of the Brand Management Plans by Hawai'i Tourism Oceania and Hawai'i Tourism Korea.

V. TOURISM RESEARCH

The Tourism Research Division (TRD) issued the February 2021 monthly visitor statistics on March 25, 2021, including monthly arrivals by country, category expenditures for major markets, and monthly visitor characteristics for each major market area.

TRD posted Seat Outlook data tables for April through June 2021 to the Infrastructure Research Section of the HTA website. This report also includes flight information. Updates to air seat schedules were also published during the month.

State, market and island fact sheets were updated with the February 2021 data and were published on the Monthly Visitor Statistics page of the HTA website.

TRD issued the February 2021 Hawai'i Hotel Performance Report on March 22, 2021. The report and related February 2021 data tables were posted to the Infrastructure Research section of the HTA website. The Hawai'i Hotel Performance Report is produced using hotel survey data compiled by STR, Inc., the largest survey of its kind in Hawai'i.

TRD issued the February 2021 Hawai'i Vacation Rental Performance Report on March 24, 2021. The report and related February 2021 data tables were posted to the Infrastructure Research section of the HTA website. This report utilizes data compiled by Transparent Intelligence, Inc.

The results of the second wave of the Special Visitor COVID-19 Study were presented to the HTA Board on March 25, 2021 by Barbara Ankersmit and David Pettinger of Anthology Research. This special survey is part of the contract for the Visitor Satisfaction and Activity Study. The presentation to the board was posted on the HTA website on the Visitor Satisfaction and Activity page.

TRD published a new YouGov Coronavirus Travel Sentiment report prepared by HVCB. This report focuses on the impact of COVID-19 on U.S. Avid Travelers and provides travel planning trends, attitudes, and demographics. TRD continued publishing weekly Hawai'i YouGov Destination Brand Index for U.S., Japan, and Canada. These reports are posted on the Other Research Section of the HTA website. The report utilizes data from YouGov's Brand Index.

A new YouGov Destination Brand Index report focusing on the Responsible Traveler was launched on March 23, 2021. The report currently features the U.S. market and presents trends on a by island basis. Other markets will be added as data becomes available.

TRD continued publishing weekly Travel Agency Booking Trend reports which features forward-looking data for the U.S., Japan, Canada, and Australia from Global Agency Pro. These reports are posted on the Other Research Section of the HTA website.

TRD assists in preparing the HTA Daily Tourism Brief which is posted on the COVID-19 (Novel Coronavirus) alert page on the HTA website. Data include daily transpacific passenger counts by port of entry, daily travel agency bookings/cancellations for U.S., Japan, Canada, and Australia from Global Agency Pro, daily forward-looking travel agency booking data for U.S., Japan, Canada, and Australia from Global Agency Pro, and weekly hotel performance from STR, Inc.

TRD is assisting with the mandatory 10-day quarantine, including attending HI-EMA operational calls, posting of daily transpacific passenger arrival data derived from data provided through the Office of Enterprise Technology Service's Safe Travels Program, and supporting state and county law enforcement and prosecutors. HTA also supports the Safe Travels Program by providing air service schedules.

TRD continued to work with the State Attorney General's office to analyze visitor data related to the impacts of the national travel ban on inbound travel from seven affected countries.

TRD continues to reply to requests for information from HTA's Global Marketing Team, industry, media, and the general public. Data requests completed include:

- Additional detailed visitor statistic data for UHERO and DBEDT/READ for their databases, and the monthly data requests
- Research inquiries routed through DBEDT

VI. ADMINISTRATIVE

Contracts List: Pursuant to Hawai'i Revised Statutes §201B-7 (9), please find the following contracts executed during the month of March 2021:

March 2021						
Contract No.	Contractor	Description	Contract Amount	Total Contract Value	Start Date	End Date
20007 S3	AVIAREPS Marketing Garden Holdings Ltd.	Destination Marketing Management Services for Korea MMA	\$ -	\$804,000.00	2/25/2021	12/31/2022
17017 S10	Vox International Inc.	Destination Marketing Management Services for Canada MMA	\$ -	\$6,165,815.08	3/5/2021	12/31/2021
17029 S17	Hawai'i Visitors and Convention Bureau	Destination Marketing Management for USA MMA 2021	\$(271,570.32)	\$105,105,701.58	2/25/2021	12/31/2021
21019 S1	The Walshe Group Pty Ltd dba Hawai'i Tourism Oceania	Hawai'i Tourism Inbound Destination Marketing Management Services in the Oceania Major Market Area	\$ -	\$400,000.00	3/5/2021	12/31/2023
21020•	Kāhuli Leo Le'a	Hawaiian Airlines May Day 2021: Māka'ika'i	\$50,000.00	\$50,000.00	3/5/2021	12/31/2021
21009	Destination Management Action Plan for Maui Nui	SMS Research & Marketing Services, Inc.	\$1,800.00	\$41,459.68	3/29/2021	3/31/2021

Contract Type: • Sole Source † Procurement Exemption

APPENDICES

Monthly Leisure Marketing Report

March 2021

Hawai'i Visitors & Convention Bureau (USA) 2021 Monthly Leisure Marketing Report – March

Market Intelligence/Market Conditions

Economy

- The number of positive forces acting on the U.S. economy is unprecedented with fiscal stimulus, monetary policy, state re-openings and vaccine distribution all playing a role. Soon to be added to the mix will likely be a complex pairing of infrastructure spending and tax increases. U.S. payroll employment increased by a very strong 916,000 jobs in March. Moreover, January and February payrolls were revised up by 156,000 jobs. The unemployment rate dropped to 6.0 percent. The modest decline in average hourly earnings reflects the mix of new jobs added, with many lower paid jobs in the leisure and hospitality sector coming back in March, according to Robert Dye, Chief Economist, Comerica.
 - The Conference Board *Consumer Confidence Index* surged in March to its highest reading in a year after a modest increase in February. The Index now stands at 109.7 (1985=100), up from 90.4 in February.
 - The *Present Situation Index* based on consumers' assessment of current business and labor market conditions climbed from 89.6 to 110.0.
 - The *Expectations Index* based on consumers' short-term outlook for income, business and labor market conditions also improved from 90.9 last month to 109.6 in March.
- Consumer Confidence increased to its highest level since the onset of the pandemic in March 2020," said Lynn Franco, Senior Director of Economic Indicators at The Conference Board. "Consumers' assessment of current conditions and their short-term outlook improved significantly, an indication that economic growth is likely to strengthen further in the coming months. Consumers' renewed optimism boosted their purchasing intentions for homes, autos and several big-ticket items. However, concerns of inflation in the short-term rose, most likely due to rising prices at the pump, and may temper spending intentions in the months ahead."

Outbound Travel Market

- Wholesale partners are seeing very positive trends with one partner saying they are seeing "unprecedented demand" in week-over-week bookings. All are seeing sustained strength and the largest total booking pace since pre-pandemic levels. Demand for Kaua'i is cautiously optimistic due to its reentry into the Safe Travels Hawai'i program on April 5, 2021.

Competitive Environment

- According to a report from Reuters last week, Greece's Tourism Minister Harry Theocharis announced that anyone who is vaccinated, has antibodies or tests negative in advance of their trip will be invited to visit starting May 14. It is good news for both tourists and Greek tourism, with one in five Greeks working within the industry. The government hopes to attract at least 50 percent of the 31.3 million people who visited annually prior to the pandemic, according to *The Guardian*, to begin to reverse some of the economic hardship that has befallen the country.

- U.S. citizens are permitted to travel to Ireland, though you are required to show a negative COVID-19 PCR test taken within 72 hours prior to arrival. To restrict non-essential travel, the government has also made mandatory a “Passenger Locator Form,” which indicates where visitors will be quarantining for the required 14 days. Failure to submit to a test in advance of your trip can result in a fine of up to \$3,000 or even six months in jail.
- Iceland’s government announced that it needed more time to ensure procedures were in place. As of April 6, 2021, all U.S. visitors are welcome, assuming they meet one of two criteria: A completed AstraZeneca, Janssen (Johnson & Johnson), Moderna or Pfizer-BioNTech vaccine; or a previous COVID-19 infection, as confirmed with a positive antibody test or positive PCR test older than 14 days. Visitors need to pre-register before travel and can present an official paper or electronic COVID-19 vaccine certificate that includes the traveler’s name, date of birth, date and location of vaccination, vaccine administered and the manufacturer and batch or lot number. Per the revised April 6, 2021 guidelines, vaccinated U.S. travelers will be required to take a test upon arrival.
- Travelers to the UK must complete a passenger locator form and provide proof of a negative coronavirus test taken in the 3 days before departure. All visitors must quarantine for 10 days on arrival, even those testing negative will still need to quarantine. European officials have announced plans for an EU-wide "Green Digital Certificate". This would allow anyone vaccinated against COVID-19, or who has tested negative, or recently recovered from the virus, to travel within the region. Officials hope the certificate will be in place before the summer tourist season.

Consumer Trends

- According to NPD Group:
 - As 2021 begins, the market landscape remains uncertain. The vaccines bring hope of a much-needed return to normalcy, though its rollout across the U.S. will take months. In this time of rapid change, NPD analyzed the purchase patterns that shaped 2020 to inform the view of important considerations for businesses across retail, food, entertainment, and tech. These serve as a reference point to help companies plan for the near future and navigate the rapidly evolving marketplace.
 - **Shifting Priorities.** Since the onset of COVID-19, consumers have purchased for the “here and now,” seeking ways to optimize time spent at home, Chief Industry Advisor Marshal Cohen said. Once people return to work and going out, that could change. There may be strong demand for categories that have been less in demand, such as apparel, beauty, and footwear, as consumers look to refresh their wardrobes. At the same time, there may be a temporary pullback in some industries that did well in 2020, and specifically among products that improve home life as many consumers have already bought those products and will be eager to re-prioritize their spend.
 - **Home Productivity.** The rise of remote work and learning has fueled the need for consumers to develop productive workspaces in their homes, said Consumer Technology Analyst Ben Arnold. Sales of productivity-related items like mice (+53%), keyboards (+68%) and monitors (+90%) have surged in the six months ending November 2020 compared to the same period in 2019. Now that many consumers have purchased these basics, companies in the productivity space should look for new opportunities to upgrade consumers’ home workspaces to make the work-from-home experience even more seamless. Because many employees may continue working from home even after the COVID-19 threat fades, companies will need to determine how to make the corporate supply closet more accessible for a work-from-home workforce.

- **Destination Decisions.** Although many consumers are putting their jet-setting ambitions on hold, certain kinds of domestic travel, particularly driving-distance destinations primed for outdoor adventure, are better positioned for the months ahead. Retail tracking data shows outdoor equipment sales surged in the second half of 2020 as consumers sought activities that allowed for social distancing. Year-over-year sales of items like paddle sports (+53%) and camping equipment (+31%) grew at the start of Summer 2020. Additionally, snow sports equipment sales in the U.S. grew +76 percent in the opening months of the snow season (August through October 2020) compared to the same period in 2019. With so much uncertainty, travel in 2021 is bound to look different than in years past. It will be important to watch how exactly travel changes, particularly the degree to which consumers' travel destinations reflect their newfound interest in the outdoors.

Media Trends

- *Live videos transforming the social media game, according to Stan Ventures 2021.*
 - With most social media experts recommending that brands focus on video marketing for a while now, there is no doubt that live videos on social media are going to gain much popularity in 2021. Brands are now exploring live videos frequently to connect with their customers for chit-chats. Surprisingly, the popularity of live videos has surpassed the demand for video content, too. Presently, live videos are being broadcast on *Twitter, Facebook, YouTube, Instagram, and Tumblr* because almost 82 percent of the audiences prefer live videos on social media.
- *Brands continue investing in influencer marketing.*
 - Influencer marketing dominated the whole of 2019 and it will continue to do so for the next few years. However, the way that brands and influencers collaborate will see changes in the coming days. Brands will now collaborate with influencers over a series of social media promotion posts and not just for a single promotion post. They will put equal efforts in promoting the content created by these influencers. Bigger brands are expected to collaborate with micro-influencers and niche bloggers to bring inclusivity and transparency in their marketing efforts. This also means that brands will be cautious in choosing influencers and crackdown on imposters thriving on fake followers.

Airlift

- HTA Airline Seat Capacity Outlook for April-June 2021 was released on March 30, 2021. The forecast for domestic scheduled nonstop air seats to Hawai'i during this period will increase by +882.0 percent compared to the same time period in 2020 (April 2020 was the first full month of the Hawai'i 14-day quarantine and the immediate reduction of flights is reflected in the high percent change). This projection is based on flights appearing in *Diiio Mi*. Due to the COVID-19 outbreak, the constant fluidity of seats and flights will continue as the COVID-19 pandemic evolves. An overall increase of flights is expected from all major market areas: U.S. West (+787.0%) and U.S. East (+710.1%). The situation is being monitored daily and the forecast adjusted accordingly.

Market Intelligence/Market Conditions Impact on Hawai'i Travel

- Hawai'i's mandatory 10-day quarantine for arriving passengers remained in effect. Governor David Ige issued an 18th COVID-19 emergency proclamation in which he signaled the possibility of a new exception for vaccinated travelers in the future based on guidance from CDC. Until such time, the only alternative to the mandatory 10-day quarantine is a negative NAAT COVID test from a Trusted Testing Partner taken within 72 hours of departure on the last leg of the trip to Hawai'i and having those results uploaded to the traveler's Safe Travels account prior to boarding that last leg.
- The island of Kaua'i rejoined the state's Safe Travels program on April 5. The county had opted out of the program in December due to the global rise in virus infection cases.
- U.S. West:
 - California public health officials are still recommending that Californians avoid non-essential travel outside the state or more than 120 miles from their home. Visitors from out-of-state are discouraged from coming to California for non-essential purposes. Returning California residents continue to be advised to quarantine for 10 days after entering the state. Returning Oregon residents are advised to self-quarantine for 14 days after arrival. Quarantine recommendations do not apply to residents returning from other states or countries if they have received both doses of a two-dose COVID-19 vaccine (or one dose of a single-dose vaccine), it has been at least 14 days since their final dose of COVID-19 vaccine, and they have no COVID-19 symptoms. In Washington State, Governor Inslee announced at the start of March that all air passengers would be required to comply with the requirements ordered by the U.S. Centers for Disease Control and Prevention to obtain a negative viral COVID test within 3 days of international travel into the U.S. or to present proof of recovery from COVID-19. In addition, returning Washington residents are directed to self-quarantine for 14 days after out-of-state travel.
- U.S. East:
 - In early March, New York State Governor Cuomo announced that beginning April 1, 2021, domestic travelers will no longer be required to quarantine after out-of-state travel unless they have been exposed to COVID-19. Asymptomatic individuals who have been vaccinated against COVID-19 do not need to quarantine during the first 3 months after full vaccination, if they are fully vaccinated, are within three months following receipt of the last dose in the series, and have remained asymptomatic since their last exposure to COVID-19. For unvaccinated returning residents, they continue to have the option to "test out" of the mandatory 10-day quarantine for asymptomatic individuals. A COVID test is required within three days before their return to New York, followed by three days of quarantine. On day four of their quarantine, the traveler must obtain a second COVID test. If both tests came back negative, the returning resident may exit quarantine early upon receipt of the second negative diagnostic test. Asymptomatic individuals who have previously been diagnosed with laboratory confirmed COVID-19 and have since recovered, are not required to retest and quarantine within three months after the date of symptom onset from the initial COVID-19 infection or date of first positive diagnostic test if asymptomatic during illness.

Leisure Activity Update

Consumer

- On-line

Digital Campaign March – Estimated Impressions Per Island

PARTNERS	Central	OVB	MVCB	KVB	IHVB	LVB	DMVB
Programmatic	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
<i>Facebook</i>	282,283	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
<i>Instagram</i>	15,414	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
<i>YouTube</i>	0	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
<i>Pinterest</i>	0	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
Total	297,697	-	-	-	-	-	-

- Golf Channel - *Aloha Season Promotion* (Dec. 1, 2020 - Mar. 28, 2021): The 2021 *Aloha Season* program with Golf Channel wrapped up at the end of March.
 - Paid Media: 30-second golf commercials highlighting four different PGA TOUR professional players engaging in destination activities that convey a sustainable/*Mālama Hawai'i* message:
 - Collin Morikawa – Outrigger Canoe Paddle/Fishpond (Maui)
 - Lanto Griffin – Zipline/Tree Planting (Maui)
 - Corey Conners & Max Homa – Whale Watch/Conservation (Maui)

Travel Trade

- Paid trade media – nothing new to report.

Public Relations

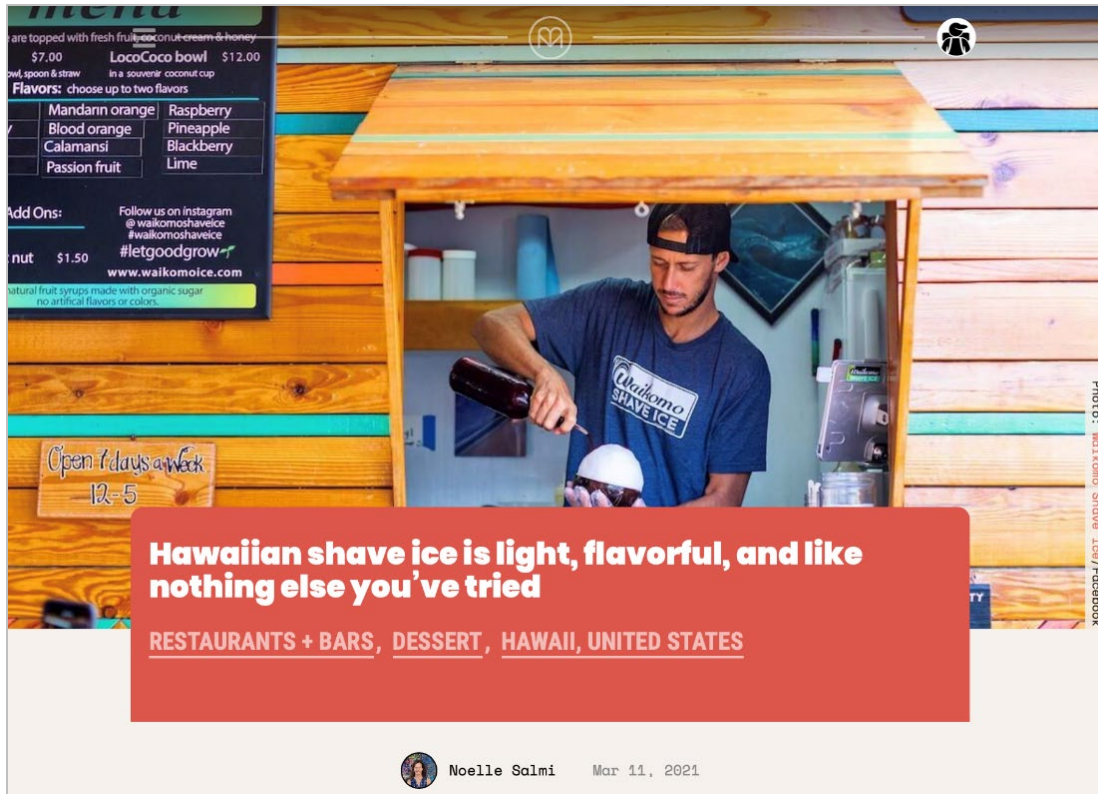
- HVCB
 - As a result of garnering a strong media relationship with Jay Jones, contributor of *Los Angeles Times*, HVCB PR team supported a portion of his visit while he was on O’ahu (Mar. 3-5) gathering content on his own. Jay experienced ‘Alohilani Resort and participated in the tree planting *Mālama Hawai'i* program activity at Gunstock Ranch.
 - As a result of participating in HVCB’s press trip in February 2020, Stefanie Waldek produced a story titled, “10 Best Destination Wedding Locations” in *Travel + Leisure*. In her roundup of best wedding destinations globally, she included Hawai’i, where she shared how each island has its own distinct experiences where couples could wed on one island and honeymoon easily on another, enjoying completely different experiences.
 - The HVCB PR team evaluated the Hot 100 media list with most relevant publications for a responsible travel target audience and put together a list of target media for pitching and media travels between Q2-Q4 to share regenerative tourism and the *Mālama Hawai'i* Program. All efforts are centered around encouraging visitors to engage in a richer visitor experience by giving back.
 - HVCB PR team drafted and distributed a press release on Mar. 25 to local PR industry professionals, local and national broadcast stations, leisure publications, editors and freelance

journalists titled, “State Of Hawaii And Airline Carriers Partner To Expand Pre-Clear Programs To Ease Summer Travel.” The release detailed the state’s partnership with various domestic and international air carriers in a joint effort to ease the arrival process ahead of the busy summer season. The release was also distributed through the PR Newswire networks, which reaches more than 4,500 U.S. websites, including popular sites such as *Yahoo! Finance*, *MarketWatch* and *Business Journals* and nearly 3,000 newsrooms, like The New York Times, ABC News, BuzzFeed and more.

- Media coverage highlights:
 - “Alaska’s Pre-Clear Program makes flying to Hawaii a breeze says guest & island native” – *Alaska Airlines Blog* – Shanyn Wright – Mar. 4
 - “Will the Pandemic Fix Hawaii?” – *Outside* – Martha Cheng – Mar. 6



- “5 Reasons to Visit Kilauea, Kauai” – *TravelAge West* – Marty Wentzel – Mar. 6
- “In Hawaii, Reimagining Tourism for a Post-Pandemic World” – *New York Times* – Tariro Mzezewa – Mar. 7
- “Hawaiian shave ice is light, flavorful, and like nothing else you’ve tried” – *Matador Network* – Noelle Salmi – Mar. 11



- "10 Best Destination Wedding Locations – *Travel + Leisure* – Stefanie Waldek – Mar. 13
- "Can't Get To Hawaii Right Now? Here's The Next Best Thing" – *Forbes* – Debbi Kickham – Mar. 23
- "State Of Hawaii And Airline Carriers Partner To Expand Pre-Clear Programs To Ease Summer Travel" – *PR Newswire* – Mar. 25

- KVB

- Kaua'i was featured in:
 - *TravelAge West* (uvpm 198,167)
 - "5 Reasons to Visit Kilauea, Kauai," Mar. 6. Coverage resulting from assisting HVCB with freelance writer, Shane Nelson's multi-island visit in December 2020.
 - "Hawaii COVID-19 Travel Update: Kauai Re-Enters 'Safe Travels,' and Good News on the Way for Vaccinated Travelers," Mar. 8. Coverage was resulted from KVB's distributed news release regarding Kaua'i rejoining Hawaii's Safe Travels Program.
 - The story was also picked up by:
 - WFMZ-TV News Online (uvpm: 335,000), Mar. 9
 - *Travel Pulse* (uvpm: 277,000), Mar. 10
 - *The Epoch Times* (uvpm: 13,550,000). "Return to Kauai: A Salve for the Soul," Mar. 19. Coverage resulting from assisting freelance writer, Janna Graber's with a media visit to Kaua'i in October 2020.
 - The KVB PR team drafted and distributed a press release on Mar. 8 to local and national PR industry professionals, leisure publications, editors and freelance journalists titled, "Kaua'i Rejoins Hawaii's Safe Travels Pre-Travel Testing Program Starting April 5." The release highlighted Kauai rejoining Hawaii's Safe Travels Program and allowing travelers to bypass the mandatory Enhanced Movement Quarantine (EMQ) or Resort Bubble property when visiting the island of Kaua'i.

- True Solutions Golf hosted a virtual Golf FAM via Zoom with the Kaua'i GoGolf partners and 10 golf writers on Mar 17:
 - Jeff Neuman, *The Met Golfer*
 - John Ledesma, *Golf Magazine*
 - Jason Deegan, *Golf Advisor*
 - Rob Thomas, *Club + Resort Business Magazine*
 - Scott Kramer, *Forbes.com*
 - David Weiss, freelance golf and travel writer
 - Tom Mackin, freelance golf and travel writer
 - Lee Abbamonte, social influencer and travel contributor for *CNN*
 - Guy Nicholson, *Catalogue 18*
 - Andrew Penner, *Score Golf Canada*
- Worked with True Solution Golf to assist social influencer Lee Abbamonte's visit to Kaua'i on assignment with *CNN*. He played 72 holes in 48 hours while on Kaua'i and posted on social media channels.
- Liaised with 24 media in March:
 - Jade Snow, *Hawaii Magazine*
 - Ramsey Qubein, *Forbes*
 - Mary Holland, *Travel + Leisure*
 - Michele Bigly, *Conde Nast Traveler / San Francisco Chronicle*
 - David Dickstein, *Orange County Register*
 - J.S. Marcus, *The Wall Street Journal*
 - Kylie Ruffino, *Budget Travel*
 - Shaun Melady, *Upscale Magazine*
 - Eileen Ogintz, *Taking the Kids*
 - Megan Gambino, *Smithsonian Magazine*
 - Sunny Fitzgerald, *Travel + Leisure*
 - Michele Hermann, *CheapTickets.com*
 - Jennifer Billock, *Oyster Magazine*
 - Scott Laird, *Travel Pulse*
 - Ashlea Halpern, *Condé Nast Traveler*
 - Cheryl Tsutsumi, *AAA Explorer*
 - Jeanne Copper, *HawaiiIslander.com*
 - Janna Grabber, *The Epoch Times*
 - Michelle Winner, *Brides*
 - Anna Cook, Blogger
 - Brittany Rendak, Blogger
 - Shaun Melady, Freelance writer
 - Lola Garcia, Influencer
 - Sarah Funk, Influencer
- OVB
 - O'ahu was featured in:
 - *Matador Network* (*uvpm*: 793,456) Coverage resulted from requested media assistance from Noelle Salmi in March 2021. Her article, "Hawaiian shave ice is light, flavorful, and like nothing else you've tried" features Waiola Shave Ice and Matsumoto's Shave Ice.
 - *Future Human* (*uvpm*: 9,600) Coverage resulted from Lucy Sherriff's participation in the Millennial Eco-Tourism Press Trip in May 2019. Her article, "Hawaii's Forgotten Native-

Language Newspapers Are a Treasure Trove of Climate Data” features Puakea Nogelmeier, PhD and the University of Hawai‘i.

- *The Points Guy* (uvpm: 2,056,788) Coverage resulted from Clint Henderson’s individual media visit in March 2021. His article, “Fair warning, Hawaii is again packed with tourists” features Waikīkī Beachcomber, Hilton Waikīkī Beach, Kualoa Private Nature Reserve.

○ Liaised with 20 media in March:

- Julia McIntosh, PBS’s Bringing it Home
- Janna, *Janna on a Jaunt*
- Emily Nathan, *Tiny Atlas*
- Noelle Salmi, *Matador Network*
- Dakota Kim, *Travel + Leisure*
- Susan Barnes, *Freelance*
- Megan Gambino, *Smithsonian*
- Samantha Brooks, *Pasadena Magazine*
- Karen Cicero, *Parents Magazine*
- Mai Pham, *Cheap Tickets*
- Chadner Navarro, *Hemispheres*
- Anna Cook, *Anna Cook*
- Christine Sarkis, *Family Vacationist, TripAdvisor*
- Michael Weiss, *Michael Does Disney*
- Nancy Sevilla, *Fancy Nancista*
- Jessica Ricks, *Hapa Time*
- Jackie Foley, *Bartender Magazine*
- Jennifer Billock, *Oyster Magazine*
- Social Influencer, *Southwest Airlines*
- Cheryl Tsutsumi, *AAA*
- Leila Najafi, *Thrillist*

● MVCB

○ Liaised with and/or provided information or image(s) assistance to the following media:

- Lyn Mettler, freelance: *Reader’s Digest* (circ: 10.5Mil) and *MSN.com* (uvpm 957Mil). Coordinated activities for upcoming Maui Visit April 3 – 10
- Monique Cordier, *My Perfect Itinerary* (uvpm 35k). Coordinated accommodations and activities for Maui Visit, May 19 – 24
- KiraWest, @ bykwest/Social media influencer. Working with United Airlines to provide assistance on itinerary for Maui visit in May
- Julie Kessler, freelance: *SFGate.com* (uvpm 44.4Mil) Continuing to work with Julie on a Maui visit April 9 – 20
- Kari Bodnarchuk, *Boston Globe* (uvpm 7.9Mil). Developed itinerary for Maui travel March 28 – April 7
- Megan Gambino, *Smithsonian Magazine* (circ: 1.8Mil), provided best small towns information
- Charli Ornett, *5280 Magazine* (uvpm 449K), provided photos for upcoming Maui article
- Fyllis Hockman, freelance: *Tripatini*, (uvpm 218K), provided Road to Hana information
- Mary Holland, freelance: *Travel + Leisure*, (circ: 984K, uvpm 8.5Mil), provided surf camps updates
- Joshua Peagler, *CBS News*, (uvpm 57Mil) provided information on area businesses that are reopened

- Michele Herman, freelance: *CheapTickets.com*, (uvpm 3.4Mil), provided information on must see waterfalls
 - Daliah Singer, freelance: *5280 Magazine* (uvpm 449K), requested information on Honolulu, directed to OVB team
 - Ashley Hernandez, CBS Television (uvpm 57Mil), provided photos for story
 - Dan Koday, *PureWow*, (uvpm 4.4Mil), provided information on small, charming towns
 - Chadner Navarro, freelance: *Hemispheres Magazine*, (circ: 11.5M), provide information for tennis inquiry
 - Ed Condran, *Spokesman-Review* (circ: 95,939) requested assistance for possible Maui visit in March
 - Callie & Leo, *TheLACouple.com*, social media influencers. Request for assistance for visit to Maui in June
 - Ben Davidson, freelance: *AAA Encompass Magazine* (circ: 400K) and *Coastal Living* (Circ: 4Mil), request for assistance on Maui trip in August
 - Michael, @ MichaelDoesDisney, social media influencer, provided recommendations and contacts for Maui trip
 - Scott Laird, freelance: *TravelPulse.com*, (uvpm 1.36Mil), provided information on Hawaiian arts and music information
 - Leila Najafi, freelance: *Reader's Digest* (circ: 10.5Mil), provided information on small towns
 - Brittany Rendak, brittanyrendak.com (uvpm 3K), provided recommendations and contacts for upcoming Maui trip in April
 - Jennifer Billock, *Oyster Magazine* (circ: 25K), provided information on luxury, spa-like bathrooms information
 - Cheryl Tsutsumi, freelance: *AAA Explorer San Francisco* (circ: 6.5Mil), provided information best ice cream spots on Maui information
 - Ashlea Halpern, freelance: *CondeNast.com* (uvpm 984K), provided information on best waterfalls and swimming holes on Maui
 - Jeff Jenkins, freelance: *Travel + Leisure* (circ: 984K, uvpm 8.5Mil), reviewed itinerary and provided recommendations for April 7 - 13 Maui trip
 - Leila Najafi, freelance: *Thrillist.com* (uvpm 11.3Mil), provided information on eco-tourism and off-setting carbon footprint for Maui
 - Emily Kaufman, *TheTravelMom.com* (uvpm 10K), reviewed itinerary and provided recommendations for Maui stay, March 18 – 20
 - Heidi Ghim, @ heidighim, social media influencer, declined assistance, provided recommendations for potential stay on Maui
 - Emily Nathan, *TinyAtlasQuarterly.com* (uvpm 6.3K), coordinating itinerary for possible Lanai and Molokai visit
 - Dan Ranzi, *Q Digital/GayCities.com* (uvpm 161.8K) provided accommodations contacts for April visit to Maui
 - Shane Nelson, *TravelAge West* (uvpm 136.8K, circ: 21K), working on itinerary and activities for possible April visit to Maui
 - Kylie Ruffino, freelance: *Budget Travel* (uvpm 290K) provided information for article
- IHVB
 - The island of Hawai'i was featured in:
 - *Diablo Magazine Online* (uvpm: 6,668), "The Big Chill Hawai'i," Feb. 19. Coverage resulting from pitching Melanie Haiken outdoor adventure and restorative nature activities in Jan. 2020.

- *Honolulu Magazine* (uvpm: 55,048) - “We Tried This: Electric Mountain Biking Behind Hawai’i Island’s Anna Ranch Heritage Center,” Mar. 1. Coverage resulting from assisting Kevin Allen with a visit to the island of Hawai’i in Feb. 2020.
- *Diablo Magazine* (circ. 39,980) - “The Big Chill in Hawai’i,” Mar. 1. Coverage resulting from pitching Melanie Haiken outdoor adventure and restorative nature activities in Jan. 2020
- o Individual Media Visits
 - Clint Henderson (HVCB/IHVB), *The Points Guy*, Mar. 11-18
 - Ed Condran (HVCB/IHVB), *The Spokesman-Review*, Mar. 23-29
- o Liaised with 12 media in March:
 - Amber Gibson, freelance writer
 - Ava Roxanne Stritt, freelance writer
 - Connor Meeks, social media influencer
 - Dawna Robertson, freelance writer
 - Jonathan Thompson, freelance writer for *Condé Nast Traveler*
 - Richard Reed, *Los Angeles Times*
 - Lisa Sonne, freelance writer
 - Rachel Ng, *National Geographic Traveler*
 - Stephen Bramucci, *UPROXX*
 - Mariann Yip, social media influencer
 - Katie Parker-Magyar, freelance writer
 - Jane Lee and Kaitlyn Bucke, *CBS Love Island*
- o Distributed March media e-news, *What’s Sizzlin’* with partner updates.
- o Drafted second *What’s Sizzlin’* (pending review/approval) due to overwhelming partner response to call for submissions for March issue.

Sales Activities

Sales Calls, Trade Shows, Training Events

	Airline/Wholesaler/TA/TO/OTA/Other
HVCB	52
KVB	2
OVB	2
MVCB	0
IHVB	5

Summary of Key Sales Activities

- HVCB
 - o For the month of March, travel trade hosted 21 webinars/virtual training sessions for a total of 1,958 participants and was involved in 31 industry partner meetings with a total of 122 participants; there were no “one-on-one” virtual travel advisor appointments in the month. HVCB and the Island Chapters are working closely with industry partners to communicate the Safe Travels Program, pre-testing protocols, trusted travel partners list and share all the important links via the travel agent website, linking to *gohawaii.com* and the DOH accordingly.
 - o The travel trade team assisted with both the GoHawaii hotline and the GoHawaii email inquiries from travelers regarding the Safe Travels program, trusted testing partners and other general inquiries regarding traveling from the U.S. to the Hawaiian Islands.

- The team fielded all inquiries received from travel advisors across the United States via the *agents.gohawaii.com* site who required assistance to plan their clients' trips and navigate the Safe Travels program.
- Excursionist invited HVCB to participate as a panelist in a Virtual Hawai'i Interview on Mar. 2 with Danny Akaka, Jr. of the Mauna Lani and Chuck Merkel of the Pacific Fleet Submarine Memorial Association. 116 advisors tuned in to the interview, which was recorded.
- HVCB participated in a joint webinar with Classic Vacations, Hawaiian Airlines and Outrigger Hotels & Resorts for 30 Florida advisors to promote the new MCO-HNL route on Hawaiian Airlines.
- ALG Vacations Host Account team invited HVCB to present during their weekly meeting on Mar. 2. There were 7 BDMs in attendance.
- HVCB participated in the Midwest 'Ohana Holomua Webinar Series on Mar. 3-4. 158 advisors attended live, and the webinar was recorded. Participating Hawai'i suppliers included Classic Vacations, Delta Vacations, Fairmont Kea Lani Maui/Fairmont Orchid Hawai'i, Four Seasons Resorts Lāna'i, Globus, Grand Wailea Maui, Island of Hawai'i Visitors Bureau, Ka'anapali Beach Hotel, Kaua'i Visitors Bureau, Marriott International, O'ahu Visitors Bureau, Outrigger Hotels and Resorts and Pleasant Holidays.
- TravelSmiths, a top Signature Travel Network agency, invited HVCB to present to 35 of their travel advisors on Hawai'i's travel protocols on Mar. 4.
- An advisor invited HVCB to conduct a webinar for 22 Cruise Planners Chicagoland advisors on Mar. 8. The webinar covered Hawai'i's Safe Travels Program, Mālama Hawai'i and island updates.
- HVCB partnered with Marriott Hawai'i to conduct an Expedia Cruises Skill Up Webinar for 97 advisors on Mar. 8. The webinar covered Hawai'i's Safe Travels Program, Mālama Hawai'i and island updates.
- HVCB conducted a webinar for Consortia X on Mar. 9 for 25 travel advisors.
- HVCB participated in Apple Leisure Group's Virtual Learning Webinar on Mar. 9. HVCB presented to 20 advisors based in the Mid-Atlantic and shared details on Hawai'i's Safe Travels Program, Mālama Hawai'i and island updates.
- HVCB provided a Hawai'i update for 9 members of Apple Leisure Group's Midwest Sales Team on Mar. 15.
- HVCB provided a Hawai'i update for 8 members of Apple Leisure Group's East Coast Sales Team on Mar. 22.
- AAA Northeast and HVCB partnered to deliver a "Live from Hawai'i" Educational Session on Mar. 16 for 30 AAA travel advisors.
- A Classic Vacations/Uniglobe Hawai'i virtual presentation was held on Mar. 16 for 10 travel advisors and 30 consumers.
- TravelSavers/NEST partnered with HVCB to conduct a "Live from Hawai'i" Educational Session for 76 travel advisors on Mar. 17.
- HVCB conducted a webinar for Travel Leaders Network on Mar. 18 for 372 travel advisors covering travel protocols and destination updates.
- Bridie Travel invited HVCB to a joint IG TV presentation on the island of Hawai'i which drew 135 consumer viewers.
- HVCB conducted an "Aloha AUS-HNL!" Webinar with Hawaiian Airlines and Pleasant Holidays on Mar. 18 to promote the new AUS-HNL route on Hawaiian Airlines. 76 advisors attended the live webinar, which was recorded.
- HVCB presented at Gifted Travel Network's Virtual Book More Travel Workshop on Mar. 23 to 200 advisors.
- AAA Northeast extended complimentary exposure to HVCB to attend their consumer Virtual Marketplace Mar. 24-25. There were 173 booth visits and 107 viewers of the destination presentation. AAA Travel advisors sold \$85,000 in Hawai'i packages during the two-day event.

- HVCB participated in NorCal ‘Ohana’s Hawai‘i Webinar series on Mar. 30 & 31 to 376 advisors. Participating Hawai‘i suppliers included Courtyard by Marriott O‘ahu North Shore, Grand Wailea, Hawaiian Hotels & Resorts, Highgate Hotels, Island of Hawai‘i Visitors Bureau, Ka‘anapali Beach Hotel, Kaua‘i Visitors Bureau, Maui Visitors Bureau, Marriot International - Hawai‘i, O‘ahu Visitors Bureau, Outrigger Hotels & Resorts, Pleasant Holidays and Polynesian Cultural Center.
- Travel agent website *agents.gohawaii.com* update: There were 581 online graduates who completed the Hawai‘i Destination Specialist and/or Island Specialist educational courses online, and 665 new registrants signed up for access to online resources. The travel agent database numbers are now up to 87,522 email contacts and include 33,504 active U.S. travel advisor profile records.
- IHVB
 - Midwest Ohana webinars March 3,4 (181 attendees). Destination updates, travel protocols.
 - Carefree Travel webinar March 11 (32 attendees). Destination updates, travel protocols.
 - Plaza Travel webinar March 18 (18 attendees). Destination updates, travel protocols.
 - NorCal Ohana webinar March 30 (224 attendees). Destination updates, travel protocols.
- KVB
 - Webinar with Midwest ‘Ohana on March 4 (53 advisors)
 - Webinar with NorCal ‘Ohana on March 31 (192 advisors)
- MVCB – None to report
- OVB
 - Midwest ‘Ohana webinar March 3 (64 advisors). Destination updates, travel protocols.
 - NorCal ‘Ohana webinar March 31 (192 advisors). Destination updates, travel protocols.

Key Performance Indicators - Leisure Market

Consumer

Digital Campaign REVISED January Actuals – Estimated Impressions Per Island

PARTNERS	Central	OVB	MVCB	KVB	IHVB	LVB	DMVB
Programmatic	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
<i>Facebook</i>	1,148,093	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
<i>Instagram</i>	208,230	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
<i>YouTube</i>	0	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
<i>Pinterest</i>	0	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
Total	1,356,323	-	-	-	-	-	-

Revised January actuals that were reported in the February leisure report.

Digital Campaign February Actuals – Estimated Impressions Per Island

PARTNERS	Central	OVB	MVCB	KVB	IHVB	LVB	DMVB
Programmatic	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
Facebook	257,287	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
Instagram	59,302	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
YouTube	0	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
Pinterest	0	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
Total	316,589	-	-	-	-	-	-

Public Relations

- Month-end impressions and publicity values for articles that included Hawai'i – February results

FEBRUARY	Impressions	Publicity Values
Print	67,783,613	\$13,919,866
Online	2,074,559	\$27,084,216
Broadcast	489,614,037	\$14,184,908
Total	559,472,209	\$55,188,989

Countermeasures

- The Hawai'i Visitors and Convention Bureau's call and email teams continued to field and answer questions from industry partners, clients, media and travelers. Staff ensured information shared with the various constituencies was the most current about trans-Pacific and inter-county travel along with the departure and arrival protocols that need to be followed. In addition, the public relations team worked with the office of the Governor to distribute information to a broad spectrum of media about the state's partnerships with the airlines and the pre-clearance Safe Travels program.
- HVCB's 1-800-GoHawaii call center fielded over 21,422 calls in March. In addition, HVCB staff and call center agents responded to 7,287 Safe Travels inquiries to info@gohawaii.com.

Responsible Tourism Update

- Hawaiian Culture
 - Golf Channel - *Aloha Season* Promotion (Dec. 1, 2020 - Mar. 28, 2021): The 2021 *Aloha Season* program with Golf Channel wrapped up at the end of March.
 - 30-second commercials highlighting four different PGA TOUR professional players engaging in destination activities that convey a sustainable/*Mālama Hawai'i* message:
 - Collin Morikawa – Outrigger Canoe Paddle/Fishpond (Maui)
 - Lanto Griffin – Zipline/Tree Planting (Maui)
 - Corey Conners & Max Homa – Whale Watch/Conservation (Maui)

- Natural Resources
 - The PR team supported a portion of Jay Jones’ (contributor of *Los Angeles Times*) visit while he was on O’ahu (Mar. 3-5) gathering content on his own. Jay experienced ‘Alohilani Resort and participated in the tree planting Mālama Hawai’i program activity at Gunstock Ranch.
- Community
 - KVB
 - In response to the current pandemic, executive director Sue Kanoho continued to work regularly with the Kaua’i Emergency Management Agency Office in cooperation with the County of Kaua’i’s Mayor and Mayor’s office, Kaua’i Police Department and other state and county officials and organizations including discussion on Kaua’i rejoining the Safe Travels Program and regulations and rules regarding MCI and groups.
 - KVB continued “Resort Bubble” efforts in coordination with the County. Four additional resorts have completed, submitted and have been approved to commence the “Resort Bubble” at their properties in March for a current total of 12 open properties on island.
 - Coordinated and hosted a HVCB / KVB PR Colleagues Meeting via Zoom to inform partners of HVCB’s statewide initiatives, programs and resources to help ensure responsible tourism and to promote safety and health guidelines put into place in preparation for Kaua’i rejoining Hawai’i’s Safe Travels Program on April 5.
 - MVCB
 - Supporting Maui County’s Malama Maui County Pledge promotion with production of a rack card and video. Rack card and video to be produced by May 2021.
 - IHVB
 - Continued to support the County cohort team overseeing Pono Communications action plans/steps for the County of Hawai’i’s Tourism Strategic Plan, portions of which tie-in to the Hawai’i Tourism Authority’s Destination Management Action Plan (DMAP).
 - Support Civil Defense during tsunami watch following 8.0 earthquake (New Zealand area).
- HTA Events and Programs.
 - Provided media assets on behalf of HTA for event and program sponsorships:
 - Big West Conference: Provided logo direction and in-arena signage, as well as make good assets and direction, for Men’s and Women’s Basketball tournaments.

“Coming Attractions” for Leisure Market

	What	When	Where
HVCB	Individual Media Visit: Kari Wright (<i>Boston Globe</i>)	Mar. 28- Apr. 7	Maui
	Individual Media Visit: Jeff Jenkins (<i>Travel & Leisure, The Points Guy, Lonely Planet</i>)	Apr. 7-13	Maui
	Individual Media Visit: Julie Kessler (<i>SF Examiner, Money, Inc.</i>)	Apr. 9-20	Maui
	Individual Media Visit: Eric Grossman (<i>USA Today</i>)	May TBD	O’ahu
	Individual Media visit: Natasha Bourlin (<i>SFGate, Los Angeles Times, AFAR</i>)	May 3-5	Hawai’i Island
	Individual Media Visit: Kylie Ruffino (<i>Budget Travel</i>)	June 7-15	Maui and O’ahu

	Individual Media Visit: David Dickstein (<i>OC Register</i>)	July 15-21	Kaua'i and O'ahu
	Boutique Travel Advisors <i>Facebook</i> Live Interview	Apr. 6	Virtual
	Expedia Cruises (TX & LA Advisors) Hawai'i Webinar	Apr. 9	Virtual
	Cruises International Webinar with Classic Vacations	Apr. 13	Virtual
	World Travel Holdings Webinar	Apr. 13	Virtual
	ALG West Coast Webinar	Apr. 14	Virtual
	LBAC Travel Webinar	Apr. 22	Virtual
	Virtuoso Ready Set Go Event	Apr. 22-23	Virtual
	AAA Aloha Days Hawai'i Virtual Event with Pleasant Holidays	Apr. 27	Virtual
	Virtuoso Hawai'i Webinar	Apr. 27	Virtual
	Classic Vacations Virtual Product Showcase	Apr. 27	Virtual
	Classic Vacations Hawai'i Webinar	Apr. 29	Virtual
	Allied Travel Virtual Travel Talk	Apr. 29	Virtual
	Classic Vacations Virtual Product Showcase	May 4	Virtual
	Avoya Land Forum	May 4-7	Virtual
	Signature Travel Network Virtual Event	May 5	Virtual
	The Hawaiian Islands: Mālama Hawai'i, a Virtual Educational Event	May 12-13	Virtual
	AAA Georgia & Tennessee Webinar with Pleasant Holidays	May 18	Virtual
	Webinar promoting new CLT-HNL route with Classic Vacations and Outrigger Hotels & Resorts	May 19	Virtual
KVB	None to report		
OVB	Meet Hawai'i Virtual Event	Apr. 28-29	Virtual
	HVCB Leisure Sales Blitz – Virtual	May 12-13	Virtual
	Mailpound Webinar	June 7	Virtual
	Global Travel Marketplace	July 8-10	Ft. Lauderdale, FL
MVCB	None to report		
IHVB	Midwest Ohana Meeting / Updates	Apr 14	Virtual
	Pleasant Holidays Webinar	Apr 21	Virtual
	Travel Leaders Webinar	May 11	Virtual
	NorCal Ohana Fam	May 18-23	Hawai'i Island

Hawai'i Tourism Japan

2021 Monthly Leisure Marketing Report – March

Market Intelligence/Market Conditions

Economy

- **Lift COVID-19 state of emergency in Tokyo region:** Japan ended the COVID-19 state of emergency on March 26 in the Tokyo metropolitan region (Tokyo and neighboring Kanagawa, Chiba and Saitama prefectures), the last remaining area of the country that had been under the measure since early January. Local authorities will continue to ask restaurants and bars to close early until the end of March, while pushing back the time by an hour to 9 p.m. But as the requests are not legally binding outside of a state of emergency, there will not be any penalties for establishments that do not comply. ([source](#))
- **GDP:** The economists forecast 2021 1st quarter GDP -5% and economic recovery on 2nd quarter. Also, they stated that with United States economic recovery brings more exports growth for Japan and consumer consumption will escalate. Even though Japan is facing COVID19 cases surge in March, the economic affect is not as much as 1st state of emergency announced in 2020. They expects 2021 to be great economic growth by Tokyo Olympic and high consumption demands especially from senior generation (expect 4.9 trillion yen consumption) and Middle-aged/Retired generation (expect 4.4 trillion yen consumption). ([source](#))
- **Olympic**
 - **No international spectators for Olympics in Japan:** International spectators will not be allowed to enter Japan for this summer's Olympic Games amid public concerns over coronavirus. Some 600,000 Olympic tickets purchased by overseas residents will be refunded, as will another 300,000 Paralympic tickets. ([source](#))
 - **Economic Impacts:** Based on Kansai University study, there are several scenarios of economic loss if 1) no intranational spectators and 50% limited capacity and 2) no Olympic in summer. For control the number of spectators, Japan's economic loss is forecasted over 1.62 trillion. Also, over 4.51 trillion loss is expected if Tokyo Olympic completely cancelled. ([source](#))
- **COVID19 related**
 - **Go to Travel resumption plan:** Due to the increase of COVID19 case, the Government stop promoting "Go to Travel" and selecting the regions/prefecture less infection rate to restart the campaign eventually. Nationwide restart of Go to Travel is expected after Golden Week holiday, Mid-May. ([source](#))

Outbound Travel Market

- Many destinations are slowly reopening the businesses under restricted conditions. The Asia and Oceania destinations announced travel bubble between safe and less infection areas. Unlike these destinations, Japan continues regulating the foreign entry to control the COVID19 infection cases due to hosting Tokyo Olympic in Summer. Under the current Japan's circumstance, outbound travel businesses continue slumping for a while the industry said.

- **Entry restrictions:** The Japanese government has asked airlines to slash the number of passengers they bring into the country from overseas during the typically busy fiscal year-end travel period, amid concern about the spread of new coronavirus variants. The transport ministry has told domestic carriers to limit arrivals to 3,400 per week, while foreign airlines are restricted to 100 per flight. This marks a return to the sort of strict caps seen last April, in the early days of the pandemic, after a gradual loosening that had recently allowed domestic airlines to bring in a total of 3,000 flyers per day at Narita and Haneda airports. Non-Japanese carriers had been permitted 300 to passengers per flight. Once the COVID19 situation calm down, the government will consider ease entry restriction. (source)
- From 1/14, 2021 until further notice, all Japanese nationals and foreign nationals with the status of residence are also required to pledge to refrain from using public transportation for 14 days, and to be in quarantine at home or other designated areas for 14 days, retain the location data, and provide it to the health centers or other institutions, if requested. They are required to sign and submit the Written Pledge when entering Japan. Currently there is no official indication from the government on when the 14-day quarantine will be eased or lifted. However, major wholesalers are actively selling package tours from July 1 onward, and airlines are also looking forward to increased operation for Summer.
- **MOFA's Travel Advise Level 2:** Ministry of Foreign Affairs announced Travel advise and warning level 2 to entire global destinations on March 25, 2021. Due to the announcement, major wholesalers and OTA all travel agencies' package & group tour for outbound travel were cancelled including one of the major outbound travel period, Golden Week (4/30-5/6). In response to this, major airlines, especially non-Japan carriers suspended the operations until at least end of May.

JTB	Stop Sell until 5/10
HIS	Stop Sell until 5/6
ANA Sales & JALPAK	Stop sell until 6/30

- On the other hand, ANA Sales takes a risk and an opportunity by starting selling its tour packages from July onward from March 23, 2021. (Tour date: 7/1 – 12/24, their guests are handling by small size group under new normal conditions) (source)

Competitive Environment

Major competitive destinations like Singapore, Australia and Hong Kong are allocating huge budgets and conducting aggressive campaign for tourism recovery. They are also approaching and communicating JATA and major wholesalers to discuss revival the outbound business. Travel industry expecting Hawai'i to be the 1st destination for outbound destination to come back.

- **Tourism Funds:** Hong Kong Tourism Board (HKTB) announced 2021-2022 tourism short/mid-term plan. In this plan, HKTB invests over 160 million yen (about \$145 million) The allocation for the tourism funds are 1) 35% for domestic promotion, 2) 40% for sustainable tourism initiatives, and 3) 25% for existing programs/promotion. (source)
- **Promotions**
 - **Singapore:** Singapore and “Netflix” collaborated to showcase the story, history and culture related films of Singapore to Japan Market as tourism recovery.

- **Australia:** Australia Tourism (AT) started investing tourism funds for the recovery via TV commercial and SNS campaign in Japan. Also, AT launched special site of “Conscious Travel” to reach the travelers who are caring environment and willing to contribute to society. This site is to reaching specific audience to showcase ecological and ethical elements of Australia. ([source 1](#)) In addition, AT introduced Instagram AR camera effect to share Australia’s rare images to audience while at home. 6 types of AR effect are available and the users were able to enjoy many shots as possible. ([source 2](#))
- **New Zealand:** The tourism bureau of New Zealand will conduct the travel trade online seminar, “2021 Kiwi Connection Japan” on 4/7 and 4/21 toward travel agencies, airline partners and media to promote the destination.
- **Guam’s COVID19 Vaccination:** The government of Guam announced the 50% of its adult population to be vaccinated by May 1, 2021. This is part of tourism recovery plan to ease the quarantine rule for the destination and to share Guam as safe travel destination.

Consumer Trends

- **Credit Card data:** JCB card company implemented consumer survey during 2nd state of emergency period. Even though their activities were restricted, out-of-home consumptions were improved. By category, “travel” related increased +21.5 points as well as “entertainment” +7.6 points. ([source](#))
- **Ethical related consumption:** The market research of “Ethical related consumption” showed the awareness of “ethical” had increased 30% due to the COVID19. The ethical actions that respondents took are 1) avoiding wasteful consumption, 2) protect natural environment, 3) support “local production, local consumption and others. ([source](#))
- **Consumer sentiments:** The survey conducted age between 20-69 years old to research the consumer sentiments during 2nd State of Emergency (SoE). The 36% of respondents expressed self-refrain going out even though the SoE lift; however, the interest and desire of going out with family, dining with the few friends, and visting entertainment venues including movie theater & amusement park are increased compared to previous survey 2 month ago. ([source](#))

Digital Marketing Trend

- **More Virtual experiences**
 - Online/Offline service model “Platformer” is developing by one of the largest department store company, Mitsui -Isetan Holding to provide wide variety service and high-quality shopping experience to their customers. On this platform in VR environment, a customer become avatar and able to experience shopping. More virtual experience services will be increased targeting Japanese audience not only domestically but internationally. ([source](#))
 - VR trip Tokyo was introduced as new concept of tourism and created the demands for other regional residents to experience anytime at their convenience and without visiting actual site in Tokyo. The experts stated that these types of travel choice will increase even after COVID19 ends. ([source](#))

Travel Trends

- **Online customer service:** The demand of consumer who like to acquire travel consulting, travel agencies are shifting their business model from face-to-face service to online travel arrangement.

- **JTB:** Online consulting by using PC, smartphone and tablet have started at all JTB retail stores. With this change, the branches of outbound travel destination are able to provide service direct consumers while they are in Japan as well. [\(source 1\)](#)
- **HIS:** Starting from March 22, 2021, Video chat customer service starts and installed entire HIS retail outlets throughout Japan. [\(source 2\)](#)
- **HIS Online tour:** HIS is one of the few travel agencies shifted their service to online tours during COVID19. Since April 2020, HIS online tour participants exceeded over 50,000 and covered 72 countries, 3,500 courses were serviced. As example, “Around world tour” (normally real tour takes 10 days) was conducted in 90 minutes and total 3,600 pax participated on this series. Hawai'i Coffee experience and Waikīkī online shopping tour were the examples of Hawai'i tours that Hawai'i HIS created. [\(source\)](#)
- Due to the COVID19 affect, most of wholesalers are shifting their business structures and merging department.
 - **JTB:** To recover their business, JTB announced reorganization 4 Divisions (1: Business Reform Promotion Division, 2: Business Planning Division, 3: Business Promotion Division and 4: Area Solution Business) under Tourism Business Headquarters starting from April. [\(source\)](#)
 - **HIS:** HIS reorganization from April 2021 were announced due to profit loss of 11 billion yen on their first quarter financial results in October (-80.5% down from previous year at same period).
 - **NTA:** NTA announced mid-term business plan on March 18, 2021 and the retail outlet reductions from 194 to 90 by end of 2022. Along with retail store reduction, 30% human resource cut (compared to 2019 DEC) by end of 2022. 2020 total sales were 56.7% down from the previous year.

Media Trends

- **New media related to SDGs, special features and serialization of magazines are increasing:** The recognition of SDGs varies depending on the prefecture however, according to the research done by Dentsu publishing, the recognition rate has increased 15.6% in year 2020 from year 2019 at 39.8%. In Nagaoka, the recognition percentage is 8% compare to Okinawa with 33%. Many companies and local governments conducting SDGs related seminars are leading the media exposures in new media, magazines that have high affinity for Mālama Hawai'i and responsible tourism initiative for Hawai'i Tourism Japan. Not only the interest of the reader but the number of advertisement relating to SDGs is also increasing.

Airlift

- **Passenger limits:** As stated above on Outbound travel section, due to Japan government restriction for airlines passenger limits especially foreign carriers, Hawai'i routes operators like Hawaiian Airlines (HA) faced maximum 60 passengers in the month of March. However, HA continued operating 4 flights per week under these conditions.
- **Hawai'i's positioning:** Even though ANA and JAL are focusing domestic recovery specially Okinawa and air service expansion utilized larger aircrafts. In difficult condition, both airlines invented Hawai'i route and have kept high hope for outbound travel recovery to Hawai'i.
- **Pre-clearance:** Hawaiian Airlines (HA - Narita & Kansai flights) and Japan Airlines (JAL - Haneda flights) started Pre-Clearance service from March. If their passengers are able to submit the

Hawai'i's Pre-testing requirements, their arrival experience at Honolulu Airport will be faster and smoother. HA started from 3/16 for Narita, 3/18 for Kansai. JAL started from 3/26. [\(source 1\)](#) [\(source 2\)](#)

- **Japan Airlines**

- **Extension of complementary change fee** for international flights until September tickets. [\(source\)](#)
- **COVID19 test kit:** JAL extend PCR test kit service to JAL mileage member (Japan domestic member only for now) before domestic trip. The reservation is available for air seat tickets holder from 3/8 to 6/30. [\(source\)](#)
- **Partnership with Uber:** JAL announced strategic partnership with Uber to service seamless movement from airport to destination for JAL app users. Cities of United States including Hawai'i are as 1st testing location. [\(source\)](#)

- **All Nippon Airways:** ANA started demonstration experiment of IATA Travel Pass, digital approval app developed by IATA and once the experiment passed, this will implement to international flight program. By end of June, the pass is available to the public. [\(source\)](#)

- **Flight Operation by Airlines**

ANA	2 flights operation per week from Haneda until 6/30
HA	Narita (3 flights per week) & Kansai flight (1 flight per week) operated irregular schedule until 5/31
JAL	1 flight operation per week from Haneda. Other areas are suspended until 5/31
ZIPAir	Operated irregular schedule
DL	Haneda flight suspension until 7/1, Kansai & Nagoya flights suspension until further notice
UA	Suspension until 6/3
KE	Suspension until further notice
AirAsia	Suspension until further notice

Market Intelligence/Market Conditions Impact on Hawai'i Travel

- Japan is less COVID19 infected area compared to U.S. and other global countries. However, Japan government takes very seriously. Even though the 2nd state of emergency was lifted end of February except Tokyo metro 4 prefectures (lift on 3/21), the government has regulated business activities still. Japan's domestic economy recovery program, Go to Travel campaign is suspended until further notice. Also, Japan government announced operating Tokyo Olympic with no foreign epectators allowed and these conditions accepted IOC as well. Under the conditions, the government continues foreign entry restriction, travel advise level 2, suspension of Business and Residence track. For outbound travel, 14 days quarantine for returning remain huge hurdle. Major wholesalers and airlines announced their limited operations or suspentions until early Summer; however, once the current situation is eased, travel industries are readily available to service.
- Despite of current situation, HTJ keep updating COVID19 situation especially Hawai'i's vaccination schedule to inform Hawai'i as safest travel destination for Japan Market and to increase consumer confidence traveling to Hawai'i in the future. In addition, HTJ continues 1) Online education opportunities, Hawai'i Tourism Forum as example, 2) Digital marketing via SNS, and 3) Preparation of new Mālama Hawai'i microsite launch in April.

Leisure Activity Update

Consumer

• Industry Collaboration

- **Mana Up:** Lawson, Japan's one of the biggest convenience stores targeted for those interested in health & wellness started conducting Hawai'i fair collaborated with Mana Up from March 16-April 26. Hawai'i made items such as lilikoi butter, Kauai cookies, Manoa chocolates, Ahi jerky, and taro pancakes are sold at 142 stores in Tokyo.
- **ANA Hawai'i charter flight:** Collaborated with ANA, HTJ conducted a survey campaign to provide ANA A380 charter flight on 4/11. Over 6,000 survey was conducted in between 3/10-12.

- **2nd SNS campaign** to promote HTJ's Konin (=official) product, Calbee's "Frugra" in March. Close to 3,000 applicants were entered.

	Twitter
Campaign period	3/24-3/31
New followers	1,270
Applicants	2,976
Impressions	103,168

- **Millennials initiatives:** Conducted a webinar with TABIPPO for millennial group "POOLO" on 3/27 to share the latest information of COVID-19 situation in Hawai'i and how Hawai'i has been working on to welcome visitors again. The total number of LIVE participants were 46 and total 80 archive views were resulted.
- **Email Magazine distribution:** Sent an email magazine to 351,388 consumers on 3/10 to announce a collaborated CRM survey campaign with ANA A380 charter flight in Japan, a special limited store featured Hawai'i and SDGs at Marui in Shibuya, Hawai'i Tourism Forum, Aloha Program's historic map, Support Hawai'i information, Virtual Hawai'i movie collaborated with Japanese famous voice actors, and the latest information of VODIC-19 in Hawai'i.
- HTJ's YouTube channel has changed its design to be more colorful and included the message of "Mālama Hawai'i" to share Hawai'i's beautiful nature and culture for the next generations.
- **Finalization of Microsite development:** 3 microsities including Mālama Hawai'i, Hokuea, and Surfing promotion under allhawaii.jp are almost ready to launch in April. These microsities are inter-connected and promote as message distribution and education tools to increase the awareness of responsible tourism and to become a pono traveler in Japan market. The launch date is scheduled as below.
 - Surfing web: 4/22
 - Mālama Hawai'i web: 4/22
 - Hōkūle'a web: 6/8



Aloha Program

- **Member information:** In March, 437 new Aloha Program members increased and 440 members took Hawai'i specialists. This resulted Aloha Program Hawai'i specialist members totaled 26,856 specialists. (12,313 advanced、4,501 intermediate、9,250 beginners and 792 youth and 61,714

Aloha Program Members)

- **PR efforts:** Aloha Program was introduced at Lighthouse Hawai'i magazine to increase awareness among local Japanese communities and PVS's Japanese crew story was featured on the March issue. (Reached 70,000)
- **Education:**
 - **Webinar:** Continued streaming bi-weekly webinars for consumers through the Aloha Program. Topics of the webinars in March included Hawaiian myth, history of Aloha shirts, and Olelo Hawai'i lessons, attended by total 360 Hawai'i specialists.
 - **Contents enhancement:** Continued to proactively share online contents on the Aloha Program website for consumers to utilize. In March, a total 8 new columns on history, culture, and music were posted.
- **Member outreach:** Sent an email magazine to 46,000 members of Aloha Program on 3/19 which include the announcement of the upcoming webinars for Aloha Program members, free online educational webinar information of NaHHA, Virtual May Day event information, and Aloha Program columns to learn hula. HTJ also conducted to hear members' voice and awareness of "Mamala Hawai'i" and "Pono travelers", collected total 3,486 data.

Consumer Event

- Consumer event organizers including Hotels and Department stores have approached HTJ to acquire information and endorsement of Hawai'i fairs for 2021 Summer. Since vaccination starts in April for senior and high risk individuals, consumers sentiment will be better and more demand of feel Hawai'i events will be increased the event organizers said. Some of the events are consisted only online method; however, other organizers are trying forming real events under new normal conditions.

Travel Trade

- **Hawai'i Tourism Forum on 3/16:** To enhance the online education opportunities for Travel Trade industry, HTJ created monthly Hawai'i Tourism Forum starting March. As the first forum, the theme was "COVID19 and Hawai'i" and program consisted of 1) HTJ updates and marketing message, 2) Keynote speaker: Dr. Okada/University of Hawai'i Epidemiologist, Hawai'i's COVID19 situation, 3) Airlines partners Safety protocol and 4) Hawai'i Partners panel discussion.

The participation for this forum was extended from traditional audience, Travel Agents to Educational institutes, educators, students (University) and corporate related individuals. This is part of Mālama Hawai'i promotion and Hawai'i's information widely available to reach the target audiences. In the partners' presentation and panel discussion, total 4 airlines representatives (ANA, HA, JAL and Zipair) and 4 industry partners from Hotel/Attraction/Restaurant/Transportation were invited and shared their safety protocol and recovery initiatives. Through this forum, Hawai'i was able to be showcased as "Safest destination among other competitive market" to the audience.

Results

- 760 applicants, 764 LIVE viewing participants, total 1,072 PV of the YouTube
- Media exposure: 45 coverages, 1,292,982,967 impression, AVE \$182,391
- Participants overall satisfaction: 4.2 (5 grade evaluation)

Comments from the participants: Through the forum, the participants were able to acquire most update information of Hawai'i and COVID19 situations. Dr. Okada's presentation was quite

encouraging tourism recovery. Archive footage was available for 1 week after the LIVE forum. Over 2,200 views were earned and 100 agents registered as HTJ Travel Trade website member.

- **Travel Trade Media Gathering & Interview:** On 3/2, 5 Travel Trade media including Travel Voice, Travel Watch, Travel Vision, Wing Travel and Travel Journal invited travel trade media gathering that HTJ updated the current situation in Hawai'i and shared tourism recovery plan. Through this meeting, this interview meeting resulted 6 media coverage with 2,146,150 impression and AVE \$31,478.
- **E-Mail Magazine distribution:** HTJ distributed email magazine to Travel Trade member of 18,691 on 3/12. The open rate of the email magazine was 37.1%. In the email magazine, Hawai'i Tourism Forum announcement, Hawai'i Tourism data including visitors' statistics, Mālama Hawai'i contents as well as COVID19 updates. Through email magazine, travel trade media covered the contents and was able to earn 10 media coverages with 524,366,854 impression, AVE\$24,180.
- **Travel Trade (TT) website enhancement:** Website enhancement continued in March and 20 columns were posted. The access of TT website access was increase 218% page view, 196 % up on UU in March compared to previous month.
- **Industry Support:**
 - JAL produced the special footage of Hawai'i now as their YouTube channel. HTJ provided Aloha Program contents and increase awareness of Aloha Program to JAL membership. The footage video ([Link](#)) was published on 3/22, 2021.
 - **ANA Sales' Hawai'i Tour page** site released "Link: [Hawai'i Travel Preparation](#)" during COVID19. HTJ assisted the page production by sharing Hawai'i's safety protocol and data. Also, it is out-linked with HTJ's COVID19 site.
 - **Club-Tourism:** HTJ supported Club-Tourism online consumer Hawai'i Trip briefing on 3/14, 2021. In the online briefing, HTJ presented Hawai'i's COVID19 safety initiatives, showcasing safety video and welcome message video. Close to 50 attendees were able to inform and encourage to visit Hawai'i once this situation is calm down.
 - **Satellite office support:** JALPAK HAWAII, one of the satellite office in Hawai'i, created Aloha Program on their website and flyers to enhance their services associated with knowledgeable staffs for Hawaiian cultures. HTJ assisted JALPAK Hawai'i to introduce local NPOs and provide the opportunities for product development.



Public Relations

- **Media exposures:** There were total of 93 exposures generated in March with 2,317,698,668 impression and \$3,839,725.78 AVE. Most of the exposure was made from online (68) followed by prints (23), and 2 coverage on TV. There were total of 3 exposure relating to Mālama Hawai'i which resulted in 150,500 impression and \$24,008 AVE. In the Lighthouse exposure, we included the story of the Hōkūle'a's crew and about HTJ's official learning site Aloha Program. We wish to increase the number of the local member of Aloha Program and become interactive with local community. Also, HTJ provided SDGs related information and writing for Sound Healing Association's 20th anniversary member booklets (Member profile: Hospitals, Medical institution, Medical Educational institutes and Corporates). In the booklet, Mālama Hawai'i initiatives were introduced.

- **Press Release:** In the month of March, HTJ distributed Hawai'i Tourism Forum press release on 3/2 and resulted 45 media exposures with 1,292,982,967 impression and \$182,391 AVE.
- **Distribution of Media newsletter:** Media newsletter with the theme of Aloha+ Challenge was distributed to 957 media. In the newsletter, we shared how Aloha+ Challenge was launched by Hawai'i Green Growth and how it relates to SDGs. Also, the concept of Mālama Hawai'i, Mālama Honua, Mālama Mandate with Hawai'i's strategic plan, what Pono Traveler is was included with HTJ's updated news relating to SDGs and COVID-19 and campaign.

The week later, for the first time, we set up follow up open zoom session for couple hours where media can join anytime to ask questions relating to the newsletter. During the zoom session, 6 medias has participated and we were able to communicate efficiently about Hawai'i responsible tourism initiative as well as learning about what the industry is facing. Questions relating to COVID19 was asked and we were able to communicate how safety protocols are in place in Hawai'i and directed them to COVID-19 information website. We would like to continue with the open zoom session as we distribute the newsletter. One of the media exposure in April will be about Pono traveler.

- **Media Pitches:** In March, HTJ has communicated and supported 27 media. Although it is still challenging to travel to Hawai'i due to raising number of COVID-19 in Japan and quarantine requirements, the interests of readers and viewers toward Hawai'i is strong and media exposure continues. HTJ pitched including what is Mālama Hawai'i , increase the awareness Pono Travelers, Aloha+ Challenge related Hawaii's initiatives.
- **Contents enhancement:** HTJ published 10 contents on allhawaii relating to Hawaiian culture, events and community and generated more than 8,000 PV. Contests were May Day, Honolulu Festival, Prince Kuhio Day, Mana Up's campaign with Natural Lawson in Japan, made in Hawai'i cosmetics, Hawai'i's local designer and artists. HTJ will continue to publish information relating to 4 pillars of strategic plan.
- **Branding strategy:** To strengthen the messaging strategy, HTJ is currently creating the unified messaging of Responsible tourism, Mālama Hawai'i and Pono Traveler to Japan market. In order to promote responsible tourism, it is necessary to raise awareness and to understanding, it is important to create unified message that Japanese consumer can understand. HTJ will utilize this unified message to communicate with media, travel trade partners, and consumers.

Sales Activities

Sales Calls			
Airline	Wholesaler/TA/TO/OTA	Other	Total
22	13	36	71

Summary of key Sales Activities

Airport/Airline related:

- Major Airlines along with wholesalers are forced to reorganize the corporate structure and announcement of personnel changes. JAL already announced flight operation plans including suspensions by end of June. For Hawai'i, 3 carriers (ANA, HA and JAL) are expected operating limited schedule for a while. (as of March, total 8 flights per week)

- Due to the lift of state of emergency for regional cities, the tourism recovery activities became more active. For example, Centair Airport (Nagoya) is planning real travel event on end of April and Fukuoka Airport conduct hybrid event to increase outbound travel demand.

Travel Agency/Wholesaler related:

- Due to the Japan government request, the travel agencies were cancelled their package/group tour until right before Summer. However, the industry understood Hawai'i's vaccination progress and are seeking potential target dates as July (once Hawai'i's vaccination become prevalent) to promote outbound travel. Industry believe Hawai'i's tourism recovery makes a flow of overall outbound travel recovery.
- **Managed Travel:** Travel industries in Japan expecting Hawai'i's tourism recovery as outbound travel recovery. With JATA, the airlines and wholesalers were discussing fam tour in Hawai'i for testing Managed Travel concept before Olympic.
- **2021 Golden Week** schedule were great line up days for long and mid-haul destination. However, under the Japan's conditions, domestic travel program "Go to Travel" will be preferred by consumers as expected.
- **Aloha Program Hawai'i satellite office:** Due to the COVID19 conditions, major wholesalers and regional retail agencies were not able to operate the business as normal. Additionally, because of corporate restructure due to the sales profit loss, the reduction and merger of the retail outlets were escalating. Based on the hearing, the numbers of Aloha Program Satellite office were also reduced as below as of March. However, to prepare tourism business recovery, HIS and JTB were conducted renewal of their flagship stores to increase the sales once the Japan 14 days quarantine for returning lift.
 - Tobu Top Tour □ 25 stores to 12
 - HIS □ 253 store to 165 (40% retail store reduction)
 - Fuji Travel Service: 18 stores to 10

Partner Relations

- **HPCJ monthly meeting:** HPCJ general meeting held on 3/24 (Japan time) and reported HTJ's activities especially digital marketing and Mālama Hawai'i initiatives. Total 50 member participated.
- **JHTA bi-monthly meeting:** participated JHTA member meeting on 3/17 and update current Hawai'i COVID19 situations, HTJ digital marketing initiatives and 1st Hawai'i Tourism Forum report to member. Total 36 representatives participated for the meeting.
- **Japan Club meeting:** On 3/18, Japan Club member meeting was held and HTJ presented current Hawai'i's COVID19 initiatives, Mālama Hawai'i projects shared the presentation to over 50 members of Japan Club.
- **Hawai'i Fair in Sapporo:** HTJ supported Sapporo Prince Hotel's Hawai'i Fair by involving of Hawai'i Airline. This is the sister city (Hawai'i and Hokkaido) promotion in Sapporo from Jay until end of June.

Responsible Tourism Update

Hawaiian Culture

- During the month of March, HTJ posted contents relating to Hawai'i's legends, Hawaiian Language, Honolulu Festival, Prince Kuhio Day, and Merrie Monarch Festival on SNS and gained 186,268 reach, 2,079,447 impression, and 40,826 engagement.
- May Day virtual event on 5/1 HST was introduced on General Consumer/Aloha Program email magazines, reached more than 397,389. It will be announced on April's email magazine again.

Natural Resources

- Because 3/5 is as a coral reef day in Japan, HTJ shared how coral negatively affected from the pollution and sunscreens with chemical ingredients. HTJ continues sharing the importance of using reef-safe sunscreens to Japan market to save the corals and ocean. HTJ posted contents relating to reef friendly sunscreen, the distance you need to take when you see the ocean animals on SNS and gained 161,746 reach, 179,323 impression, and 2,629 engagement.

Community

- To prepare the Mālama Hawai'i launch, HTJ approaches the following NPO to introduce each NPOs mission, activities. NPOs are 'Imiloa Astronomy Center, Maunalua Fishpond Heritage Center, Surfrider Foundation, Hawai'i Land Trust, Mālama Maunalua. This NPO contact will continue in April activity.

Island Chapters Engagement Update

HTJ introduced the beauty and attractiveness, story angles relating to neighbor islands and O'ahu and on SNS and gained 164,253 reach, 2,517,935 reach, and 3,187 engagement.

Islands	Total posts	Reach
O'ahu	8	778,154
Island of Hawai'i	6	299,874
Maui	3	1,208,236
Kaua'i	3	91,858

"Coming Attractions" for Leisure Market

What	When	Where
Hawai'i Tourism Forum	4/21	Online
HPCJ Monthly Meeting	End of April	Online
Mālama Hawai'i Website Launch	4/22 (4/21 HST)	Online
Surfing Website Launch	4/22 (4/21 HST)	Online
Wear Aloha Save Aloha Campaign Launch	4/22 (4/21 HST)	Online

Hawai'i Tourism Canada

2021 Monthly Leisure Marketing Report – March

Market Intelligence/Market Conditions

Economy

- Canada's economy will expand by 5.8 per cent this year and 4.0 per cent in 2022, thanks to the rollout of vaccines, which has led to a gradual reopening of the economy and boosted confidence.
- The federal fiscal deficit will improve from the \$219 billion recorded in 2020 but will remain uncomfortably high.
- The Bank of Canada will keep interest rate hikes on hold until the early part of 2023, as inflation, while spiking higher in the spring of this year, will remain in the Bank's 2.0 per cent target range through the medium term.
- The Canadian economy has already recovered close to 80 per cent of the jobs lost during the severe recession last year and the unemployment rate stood at 8.2 per cent in February, down from double-digits in the spring and summer of 2020.
- The loonie gained strength throughout the first two months of 2021 reaching an average of USD \$0.787, a 3.7 per cent increase over 2020.

Outbound Travel Market

- More than 252,000 overnight trips were recorded in January. This was the highest level of monthly activity since March 2020 but still reflects a 91 per cent decline versus the previous year. Compared to January 2020, overseas activity fell by 1.2 million trips while transborder trips declined by almost 1.4 million. The activity registered during the month reflects just 7 per cent of the volume recorded one year ago, however, this share has been trending upwards since April 2020.
- Canadians made 92,000 overnight trips to the U.S. in January 2021, versus 1.5 million in 2020. Compared to the previous year, overnight auto trips fell 96 per cent and travel by other modes decreased 92 per cent. Despite ongoing travel advisories and restrictions, the number of Canadians returning from the U.S. by plane jumped 16 per cent from December.

Competitive Environment

- Traditionally one of the highest volume months for Canadian arrivals, destinations in the Caribbean, Mexico, and Central America recorded a 95 per cent decline in activity in January 2021. There were just 43,000 arrivals registered during the month, with visits to Mexico accounting for more than half of all activity. The first half of the winter travel period (Nov-Jan) saw almost 2 million fewer arrivals from Canada (-93 per cent). With almost all air

service to sun destinations suspended until the end of April, minimal activity is expected for the remainder of the season.

- There were just over 6,000 Canadian arrivals in the Asia-Pacific region in January 2021, a 98 per cent decline compared to the same period in both 2019 and 2020. With very little air access, the first half of the winter travel season (Nov-Jan) saw 1 million fewer arrivals in the region, a drop of 98 per cent compared to 2019-20. The occupancy rate for the month was 11 per cent in Thailand, 51 per cent in Hong Kong, and 55 per cent in Singapore.

Consumer Trends

- Consumer confidence continued to climb in March, reaching 105.2 points. This was the largest monthly increase since June 2020 pushing the rating up to 87 per cent of its pre-pandemic level (120.6). With lockdown measures gradually easing and increased vaccine availability, Canadians are much more optimistic about the future. Consumers were more satisfied with their current financial situation and more than one-quarter of respondents believe the job market will be better six months from now—a historically high share of positive responses. This optimism resulted in improved purchase sentiment as 24 per cent of respondents thought it was a good time to make a major purchase—the highest level recorded in the past year.

Travel Trends (direct to Hawai'i)

- Ongoing travel restrictions resulted in 126,000 fewer arrivals in January and February.
- There were just 500 Canadian arrivals in Hawai'i in February 2021, compared to 64,000 in 2020.
- So far in 2021, direct arrivals have declined by 98 per cent and indirect arrivals have fallen 97 per cent.
- Independent travelers represented 96 per cent of all visitors so far in 2021, a much higher share than previous years.
- During the period, a little more than 3,000 independent travelers were counted (-97 per cent), while package trip volumes fell 99 per cent.
- Compared to 2020, stays in hotels (-95 per cent) registered a smaller decline than stays in condos/timeshares (-99 per cent) and rental homes (-99 per cent).

Media Trends

- Facebook has introduced new tools to help Canadian content creators build their communities and monetize their content. In-stream ads enable video creators to earn from videos as short as one minute long, with a minimally-interruptive ad running at the 30-second mark. For videos three minutes or longer, ads can be shown 45 seconds in. In-stream ads can also air in live video content.

In addition, over the next few months, Facebook plans to invest \$7 million to educate and encourage consumers to support creators with Stars, tokens viewers have been able to purchase and send during live streams to boost the creator's visibility and earnings. These join other efforts the company has made to keep creators and influencers on its platform. Last August, Facebook introduced a paid online event feature, and the company has said that it will continue to not collect a share of the revenue from events or fan subscriptions through to at least August of this year.

Airlift

- Just over 12,000 direct seats were available in Jan-Feb, compared to 127,000 in 2020 and 138,000 in 2019.
- After offering seats in January, Air Canada suspended service reducing capacity by 41,000 seats (-93 per cent) during the period.
- At the same time, WestJet reduced service by 74,000 seats (-89 per cent).
- Since the launch of the Safe Travels program in December carriers have offered 19,000 seats.

Market Intelligence/Market Conditions Impact on Hawai'i Travel

- All international flights landing in Canada are being funnelled to Toronto, Montreal, Calgary or Vancouver.
- Anyone arriving in Canada will need to have a negative PCR test within 72 hours of their scheduled departure to Canada and must show the results to their airline before they board their flight. Travellers will also need to submit their contact details, a COVID-19 symptom self-assessment and quarantine plan, electronically, before boarding their flight, through the new ArriveCAN app.
- Incoming passengers must wait at a "supervised hotel" until their test results come back negative, at their own expense, roughly \$2,000 per person which is expected to be up to 3 days. With a negative test result, travelers will wait out the rest of their quarantine at home, under "significantly increased surveillance". In the event of a positive test result, travelers must go to "government facilities" in an effort to determine if the strain is one of the new variants.
- The Canadian government is extending its travel restrictions on non-U.S. international travel into Canada until at least April 21, 2021. The federal government's advisory against all non-essential international travel during the pandemic remains in effect until further notice. Because it is an advisory — not an order — Canadians can still travel abroad, but they do so at their own risk.
- Approved Vaccines - Pfizer-BioNTech, Moderna, AstraZeneca and the single dose J&J.
- As of March 31, 7,155,769 doses have been distributed, 5,004,406 first doses have been administered and at least 685,974 people have been fully vaccinated. Canada's inoculation rate is 34th among 110 countries with a population of one million or more people.




- Canada is scheduled to receive its single-largest week of vaccine deliveries, with around 3.3 million shots due for delivery from different pharmaceutical companies in early April.
- Concerns over blood clots in patients who have received the AstraZeneca vaccine may further slow the vaccine rollout in Canada. Use of the vaccine in people under-55 was halted this week.
- In Ottawa, the national immunization advisory panel says there is now sufficient “real-world evidence” to show AstraZeneca’s vaccine is safe for seniors – reversing a recommendation made two weeks ago.
- Canada will begin domestic production of COVID-19 vaccines at the end of 2021.
- Transport Minister Omar Alghabra told the Association of Canadian Independent Travel Advisors that he does not expect travel and quarantine restrictions to be lifted on May 1, saying that Ottawa is trying to get ahead of the third wave of COVID-19 and that the stricter travel rules introduced in January have reduced importation of the virus by 90 per cent.
- The Canada-U.S. land border restrictions will remain in place until April 21. The announcement comes just days after Prime Minister Justin Trudeau said that reopening the border is not an immediate priority.
- According to recent data by the Public Health Agency of Canada (PHAC), released to the National Post about one quarter of all air travellers arriving in Canada, from February 21 to March 22, were exempt from the rules. This represents roughly 26,000 travellers (23 per cent) who were not required to show proof of a pre-booked and fully-paid hotel stay, like every other traveller has had to do.
- Canada’s Health Minister Patty Hajdu, after meeting with health ministers in early April from the G7 – this being, Canada, the U.S., the U.K., France, Germany, Italy, and Japan – is supporting a plan to develop a vaccine travel certificate that is consistent with other countries.
- With the government’s ban on flights to sun destinations due to expire in just over a month, Canada’s airlines are beginning to revise schedules and ramp up flights from early June. This is a condition imposed to the airlines as part of the Government recovery package.
- WestJet announced it is restoring flights to Charlottetown, Fredericton, Moncton, Sydney and Quebec City. The reinstatement of service will restore WestJet’s complete network of pre-COVID-19 domestic airports. In addition, service between St. John’s and Toronto, which was indefinitely suspended in October 2020, will resume effective June 24, 2021.

Leisure Activity Update




Consumer

- Air Canada Vacations: Currently on hold after the Canadian Federal Government announcement on December 30, reinforcing the 'do not travel' advisory. Will not resume until further notice.
- WestJet Vacations: Currently on hold after the Canadian Federal Government announcement on December 30, reinforcing the 'do not travel' advisory. Expected to resume in early March if the do-not-travel advisory eases up.
- May 1, 2021 is the season change for the Canadian carriers. HTCAN is waiting for their Summer schedules which should be available by mid-April.




TOP PERFORMING POSTS FOR THE MONTH – INSTAGRAM:

POST IMAGE	POST TEXT	IMPRESSIONS	ENGAGEMENT ▼	APPLAUSE	AMPLIFICATION	CONVERSATION	POST CLICKS
	Not your typical board meeting. 🏄 #VisitOahu #LetHawaiiHappen 📷: roadtodana	1,828	214	206	0	8	0
	Sky above, earth below, aloha within. ▲ #VisitKauai #LetHawaiiHappen	3,068	208	196	0	5	0
	Sea where the coast takes you. ❤️ #VisitMaui #LetHawaiiHappen	2,766	199	190	0	4	0

TOP PERFORMING POSTS FOR THE MONTH – FACEBOOK:

POST IMAGE	POST TEXT	IMPRESSIONS	ENGAGEMENT ▼	APPLAUSE	AMPLIFICATION	CONVERSATION	POST CLICKS
	Surfboards (Oahu) Not your typical board meeting. 🏄 #VisitOahu #LetHawaiiHappen	3,515	191	153	4	5	29
	Kualoa Ranch Wedding (Oahu) Tap to see the view. ❤️ #VisitOahu #LetHawaiiHappen	2,440	184	47	1	2	134
	Waimea Canyon (Kauai) Sky above, earth below, aloha within. ▲ #VisitKauai #LetHawaiiHappen	3,798	183	97	5	5	76

TOP PERFORMING POSTS FOR THE MONTH – TWITTER:

POST IMAGE	POST TEXT	IMPRESSIONS	ENGAGEMENT ▼	APPLAUSE	AMPLIFICATION	CONVERSATION	POST CLICKS
	Wainapanapa State Park (Maui) Sea where the coast takes you. ❤️ #VisitMaui #LetHawaiiHappen	N/A	24	16	2	0	6
	Waimea Canyon (Kauai) Sky above, earth below, aloha within. ▲ #VisitKauai #LetHawaiiHappen	N/A	14	9	0	1	4
	Four Seasons Sunset (Oahu) "Every sunset is an opportunity to reset." - Richie Norton #VisitOahu	N/A	13	8	0	0	5

Note: The bolded text under 'post text' was not deployed.

Travel Trade

HTCAN is trying to secure free promotional and educational opportunities due to HTA's request to stay at fixed costs for the first half of 2021.

- Voyages AquaTerra, a Québec based travel agency held a Hawaiian Islands webinar with 43 travel agents participating from across the province. HTCAN gave an overview of Hawai'i and talked about the differences and uniqueness of each one of the 6 major islands. Also, HTCAN, talked about the COVID-19 updates in the state and the HDSP to encourage people to enrol in the programme.



- Hotelbeds.com Campaign: HTCAN was able to secure free of cost an educational campaign with Hotelbeds.com in their Canadian website. This campaign will run in April and May.
- Outgoing reach to set up upcoming training sessions with travel agencies across the country.
- Proactively working on sharing information regularly with the tourism industry and listening to Travel Advisors' feedback about consumer behavior and booking trends.

Public Relations

- Proactive and reactive pitching with prior approvals from the HTA. Themes include virtual experiences for families during summer break to keep Hawai'i top of mind.
- In regular conversations with media to ensure they are updated on all regulations and safety protocols pertaining to COVID-19 testing prior to travel to Hawai'i.
- Planning for virtual media event in June. Event will be focused on one of our key pillars, namely Hawaiian Culture.

Sales Activities

Sales Calls

Airline	Wholesaler/TA/TO/OTA	Other	Total
4	19	3	26

- Recurring sales calls to communicate effectively with Travel Advisors during this COVID-19 crisis. Provide regular updates on Hawai'i's pre-travel testing program for Canadians.
- Frequent email correspondence with travel advisors about specific inquiries from their clients, including COVID-19 Testing sites in Canada, airports protocols, and the Safe Travels Hawai'i program.
- Continuous communication with the Canadian carriers in order to be up to date on their schedules and short and mid-term plans.

Responsible Tourism Update

- HTCAN continues to forward reminders of the cultural webinars of NaHHA.
- The Mālama campaign keeps being explained and promoted amongst the travel advisors, and the travel industry.
- Hawaiian Culture is the center of the promotion.
- An effort has been made to create awareness in the travel advisors to pass along the message to their clients about visitors being respectful of the communities, traditions, environment, etc. when visiting Hawai'i.
- HTCAN is continuously looking for "greener" partners to engage with.

Island Chapters Engagement Update

- HTCAN is in communication with the Island Chapters. The design of the social posting calendars has been sent for their approval.

“Coming Attractions” for Leisure Market

What	When	Where
Hotelbeds.com campaign	April and May	Canada-wide

Hawai'i Tourism Oceania 2021 Monthly Leisure Marketing Report – March

Market Intelligence/Market Conditions

Economy

Australia

A number of major COVID-19 restrictions eased across Australia this month, allowing larger gatherings, easing of density limits across all venues and reducing mask wearing.

The Australian economy is predicted to rebound faster than expected from the coronavirus recession, reaching its pre-pandemic level within weeks, but it will continue to be supported by record-low interest rates for years. The International Monetary Fund has forecast the Australian economy to expand 4.5 per cent this year after shrinking by 2.4 per cent in 2020. It is a substantial upgrade to the fund's January forecasts when it expected the Australian economy to grow by 3.5 per cent this year after contracting by 2.9 per cent in 2020.

At the end of March, business confidence hit a 7-year high despite the approaching end of JobKeeper wage subsidy – according to Roy Morgan Business Confidence statistics, 59.4% of businesses said the next 12 months is a 'good time to invest'. March saw a slight softening of the AU Dollar although it is still offering great value against the US Dollar at \$0.76.

New Zealand

The New Zealand domestic economy continues to operate without major restrictions due to the strict border controls and approach to keeping COVID-19 out of the community. The upcoming opening of the Trans-Tasman bubble between Australia and New Zealand (mid April) is great news not just for tourism, but for the important business transfer between the two countries.

The NZ Dollar softened slightly over March, ending the month trading at US\$0.70.

Outbound Travel Market

Australia & New Zealand

On the border front, the Australia and New Zealand governments have just announced the commencement of a travel bubble beginning April 19. This will enable travel that is quarantine-free and free of pre-testing in both directions and is a huge boost for the tourism industry. Most importantly, it creates protocols and systems for international travel that will be gradually increased to other destinations.

The Australian government is looking to open the border to more countries after establishing a safe travel zone with New Zealand. By August, quarantine free international travel to select Asian and Pacific destinations could be possible. Immigration and health authorities are exploring plans to open to Singapore within months, followed by other nations with low COVID-19 numbers such as Fiji, Vietnam and Thailand, as well as Japan and South Korea.

Competitive Environment

Australia & New Zealand

Tahiti will be officially reopening to tourism May 1 with a protocol at the entry put in place using virological testing, serological testing, vaccine and an ETIS (Electronic Travel Information System).

Around 800,000 half-price airline tickets are being made available as part of a \$1.2 billion tourism support package unveiled by the Federal Government. The scheme will encourage Australians to take a holiday interstate at a time when the international border remains closed. The government has targeted these 13 locations for assistance, arguing they are particularly dependent on aviation for tourism during April to July. The list of subsidized destinations includes the Gold Coast, Cairns, the Whitsundays, Alice Springs and Broome.

With the opening of the Trans-Tasman bubble, we have seen an increase in marketing by the South Pacific destinations who are looking to join such a bubble as soon as practical. The South Pacific destinations have been COVID-19 free for many months.

Consumer Trends

Australia & New Zealand

New research from Twitter has revealed Australians are eager to travel internationally. So much so that travel conversations on the platform are up 53 per cent year on year, with Australia ranking the highest by far compared to any other countries. Consumers are going to extreme lengths to feel like they are travelling – with #fakeplanechallenge or #flighttonowhere trending. Pandemic-induced travel restrictions have only heightened the desire for wanderlust-fueled Australians to “get their kicks elsewhere”, according to Twitter. These kicks have come in the form of staycations. Unsurprisingly, there has been a dramatic rise in Aussies, taking trips locally or participating in local leisure activities in the past 12 months.

Travel Trends (Both general and those specific to Hawai‘i)

Australia & New Zealand

Intel from our product contacts at Helloworld Travel Limited have indicated that Helloworld is starting to plan their international marketing and product strategy. They will begin promotions in Q2. HTO has a meeting scheduled with our product contacts in May to discuss their strategy for Hawai‘i.

Media Trends

Australia & New Zealand

PR company Davies Tanner in partnership with IBTM Events on the IBTM Connect platform has launched its Global Destinations Marketing Report that looks at what channels destinations have been using to remain engaged with audiences over the last 12 months as well as what is being planned. Key insights showed that 89 per cent of destinations actively engaged with their target audiences during the pandemic. Social media represented the highest engagement channel at 92 per cent and will remain the primary channel for engagement in the recovery period. Half of destinations say they are planning to either launch or enhance their Ambassador programs, while 34 per cent say they expect to receive a short-term increase in funding to stimulate demand.

Airlift (Specific to Hawai'i)

Australia & New Zealand

The four airlines who have previously serviced Hawai'i from Oceania still show the return of flights in their schedules for Q4 (Qantas, Jetstar, Hawaiian & Air New Zealand). This is naturally subject to the governments removing the barriers to travel.

Market Intelligence/Market Conditions Impact on Hawai'i Travel

Australia & New Zealand

After the initial commencement of the vaccine rollout in February, there has been some criticism in both Australia and New Zealand around the pace. In Australia, the challenges have been related to the AstraZeneca vaccine which had been a key part of the overall rollout plan. Because of the challenges, additional orders have been made with Pfizer but this will delay the completion date. Both governments are reluctant to put an exact date on when the majority of the population will have been vaccinated.

Leisure Activity Update

Consumer

Social media content calendar: HTO continues to build momentum on Social Media by uploading 2-3 posts per week and gradually building momentum and increasing post frequency over the coming months. The posts have generated a significant amount of engagement. On Instagram interactions increased 69 per cent and impressions increasing 21 per cent compared to February. On Facebook interactions increased 49 per cent and impressions increasing 10 per cent compared to February.

Travel Trade

Visit USA – HTO attended the Visit USA committee meetings in both Australia and New Zealand this month. In Australia, HTO provided a destination update to the committee. There was discussion around a hybrid trade event to take place in July in both countries.

Luxury Escapes (LE) campaign – LE launched an integrated campaign promoting Hawai'i on March 15. The Hawai'i packages promoted have received a significant amount of interest from LE's customers with 1,109 room nights booked thus far. LE is exploring the option of working with luxury tour operators including helicopter tours to provide experiences within the packages they will be promoting. HTO is working in collaboration with OVB to connect LE with these operators.

Public Relations

HTO continues to maintain relationships with the trade and consumer press and also assist with destination and industry information where relevant and appropriate.

Sales Activities

Sales Calls

Airline	Wholesaler/TA/TO/OTA	Other	Total
3	3	2	8

HTO's meetings included Hawaiian Airlines, Luxury Escapes, Helloworld and virtual meetings with Courtyard Marriott Northshore and the Visit USA Australia & New Zealand committees. HTO also met with celebrity chef, Annabelle White to keep connections and discuss opportunities for the future.

Responsible Tourism Update

One of HTO's key focusses, as we get closer to the re-opening of airlift, is around the implementation of the Mālama Hawai'i initiative. There is a very receptive local market who are in tune with the concept and HTO will look at synergies with the successful North America programme on the promotion and implementation.

Island Chapters Engagement Update

HTO and OVB have scheduled a zoom catch up in April to keep connected on the current state of the market and future plans.

"Coming Attractions" for Leisure Market

HTO will continue to provide market intel and continue liaison with key trade, media and political partners. HTO continues to produce 'evergreen' content in preparation for activation of the recovery marketing plan and will utilize this content on its digital media channels.

Hawai'i Tourism Korea

2021 Monthly Leisure Marketing Report – March

Market Intelligence/Market Conditions

Economy

- South Korea is forecasted to have reentered the list of the world's 10 largest economies by nominal gross domestic product in 2020. According to the OECD, South Korea's nominal GDP for last year was estimated at \$1.624 trillion, which marked the 9th highest among 14 major countries, up two notches from the previous year.
- The International Monetary Fund (IMF) forecasted the South Korean economy to grow 3.6% in 2021, up from its estimate in January of 3.1% due to robust exports and Korea's fiscal policy support amid the pandemic.
- Nine major global investment banks have again upgraded their outlook for South Korea's 2021 economic growth to 3.8%, up 0.2% point from a month earlier. Among the foreign investment banks, UBS has forecasted the highest growth projection of 4.8%, followed by JP Morgan and Goldman Sachs with 4.1% as Korean economy is widely expected to gather steam amid global economic recovery.
- South Korea's exports advanced 16.6% to US\$53.8 billion in March from a year earlier and marked the highest ever in March of all time. It is the largest increase in two years and five months, double-digit growth following January, and five consecutive months of growth. Imports rose 18.8% to \$49.65 billion in March and the trade surplus reached \$4.17 billion, marking the 11th consecutive month of surplus.
- The Korea's National Assembly approved an extra budget worth nearly US\$13.2 billion to help businesses hit hard by the pandemic. Among the budget, almost 50% (US\$6.42 billion) was allocated for small businesses, performing arts sector and the travel industry.
- South Korea's consumer sentiment rose for a third consecutive month in March, as exports showed signs of a modest recovery amid the COVID-19 vaccine rollout. According to the Bank of Korea, the composite consumer sentiment index (CCSI) came in at 100.5 for March, up 3.1 points from the previous month.
- The average USD/WON exchange rate in March was 1,131.00 won, a slight increase from the previous rate of 1,111.72 won in February.

Outbound Travel Market

- Data for the number of outbound travelers in February recorded 68,213, 93.5% year-on-year (YOY) decrease.

Month	Departures	Growth (%)
January	86,143	-96.6%
February	68,213	-93.5%

Competitive Environment

- Thailand Government approved 3-step re-opening travel plan on major 6 regions including Phuket and Chiang Mai. From April to June, 2021, international travelers to those regions are obliged for only 7-day quarantine. Especially, Phuket will exempt quarantine to vaccinated travelers starting from July.

Consumer Trends

- Online shopping in South Korea grew 15.2 percent in February as more people bought products via e-commerce platforms amid the pandemic. The value of online shopping transactions stood at 13.7 trillion won (\$12.2 billion) in February, compared with 11.9 trillion won the previous year, according to the data from Statistics Korea. Purchases made through smartphones, tablets and other mobile devices rose 20.2 percent to 9.73 trillion won in February. Mobile shopping made up 70.7 percent of the total value of online shopping.
- Sales at department stores increased 34 percent year-on-year in February in the biggest jump in 25 years since 1996, according to the latest data from Statistics Korea. The retail sales index, which is designed to reflect consumption trends, appears to have recovered to near pre-pandemic levels during February. Compared to pre-pandemic times, the retail sales index for cars and home appliances was even higher in February than December 2019 which reflect the change in lifestyle due to the pandemic as people spent more time at home and went out less.

Travel Trends

- The number of domestic passengers rebounded in February to pre-COVID-19 level while the number of international passengers was plummeted due to the pandemic. According to the Ministry of Land, Infrastructure and Transport's aviation portal, the number of domestic passengers at national airlines reached 2.31 million in February, close to 2.49 million in February 2019 and a 35% increase when comparing with the same month of 2020.
- A recent survey showed how COVID-19 changed travel by comparing answers in May and November of 2020 when COVID-19 had spread and vaccinations had been materialized respectively.
 - Leisure activities which people wanted to do but couldn't do due to COVID-19
 - May: domestic travel (51%); friends & family gathering (45.5%); going to theaters (44.7%); overseas travel (38.4%)
 - November: overseas travel (49%); domestic travel (48.2%); going to theaters (43.6%); friends & family gathering (38.4%)
 - Intention to travel abroad in case COVID-19 continues
 - May: 5.7% of respondents had intention to travel abroad despite of COVID-19
 - November: 9.5% of respondents had intention to travel abroad despite of COVID-19
(source: Korea Culture and Tourism Institute / no. of respondents: 2,000 / multiple choices)

Media Trends

- Naver, the no.1 portal site in Korea, will implement a service and compensation policy aiming at 'influencers' with large pool of subscribers on social channels such as Youtube and Instagram. Naver is facing a big crisis as the trend of searching by video on YouTube has recently spread especially among the younger generation. In a situation where YouTube is threatening not only the video but also the search market, Naver seems to be attempting to raise the competitiveness in the search market again by securing popular influencers. The Naver Influencer Center continues to share the content creation know-how and success stories of popular creators, and the 'Expert Consulting' program, which allows to receive expert consulting in various fields such as tax and accounting and etc.
 - Respondents who said they used Naver ranked first with 90%
 - 60% of Internet users use YouTube for online searches
 - YouTube, a video platform, not a search portal site, is following the search portal Naver right after
 - 27.1% of users answered that they use Instagram when searching, ranking 5th in online search channels.

Airlift

- Korean Air extended its suspension of flight services on ICN-HNL route (KE053) and ICN-NRT-HNL route (KE001) till May 31.
- Asiana Airlines halted flights service of ICN-HNL route (OZ232) until May 31.
- Hawaiian Airlines has announced increasing direct flight operation from ICN to HNL to two weekly flights (HA 460), every Friday and Sunday.

Market Update Impact on Hawai'i Travel

- The Ministry of Foreign Affairs extended the special travel advisory for Koreans to avoid non-essential overseas trips until April 16, 2021.
- On April 6, the Korea Centers for Disease Control and Prevention (KCDC) announced a revision of the Act on the Prevention and Management of Infectious Diseases to allow the quarantine period to be flexible. If the amendment is implemented, the mandatory quarantine period for overseas arrivals, currently set for 14 days, can be shortened depending the COVID-19 status, vaccination level, and antibody formation level. The industry experts are expecting the 14-days quarantine will likely be lifted in Korea by November this year if the government achieve the goal of accomplish herd immunity by November as planned. The Korea government plans to vaccinate 12 million people (23% of the population) by the end of June, with a goal of achieving herd immunity by November.
- As the vaccine passports become visible and the discussion on travel bubbles between countries is speeding up, many travel agencies expect that overseas travels to fully resume around the Korean Thanksgiving holidays (Chuseok) this year. With the positive perspective, Hana Tour, the largest travel agency in Korea, increased its active staff to 20% more than March and resumed its B2B service. Very Good Tour and Interpark actively launched overseas travel products using various sales channels, and Yellow Balloon Tour plans to showcase its new booking platform. Also, they are expanding their contact points with consumers aggressively by providing coupons or mileage points.

- Korean Air will launch a pilot operation of Travel Pass, initiated and led by the International Air Transport Association (IATA) to prepare for safe and convenient air travel in the post-COVID-19 era. Korean Air already signed a MOU with IATA to test-run the Travel Pass and plans to operate actual operation in May for KE011 passengers from Seoul to Los Angeles after the internal test in mid-April. The IATA Travel Pass is a "digital certificate" that allows passengers traveling by flight to check the results of the COVID-19 test easily using an application of their mobile phones.
- The Korean government will introduce vaccine passport app in April for immunized citizens, and it will allow travelers to show digital proof of vaccination. The app will be developed with blockchain technology to prevent counterfeit, and protect personal information.

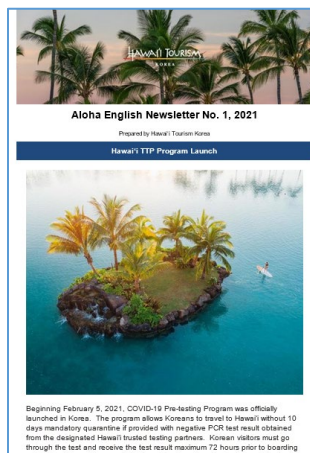
Leisure Activity Update

HTK COVID-19 Crisis Management:

- **Pre-PCR Test Program:** HTK waiting for the signed agreement from the State to finalize the partnership agreement with COVID-10 Test Center at ICN. HTAK is also looking forward to the Korea University Hospital to submit the required documents for the additional partnership application.
- **Safe Travels Program:** HTK has updated the alert page on Gohawaii.kr web page explaining specific instructions on how to apply on Safe Travels Program for Korean visitors.

Consumer

- **B2B newsletter distribution:** HTK distributed B2B newsletter to industry partners in March including the information on TTP program launch in Korea, current airlift update and highlights of HTK activities. The newsletter also covered the latest Korea market updates such as COVID-19 updates, economic forecast and consumer sentiments.



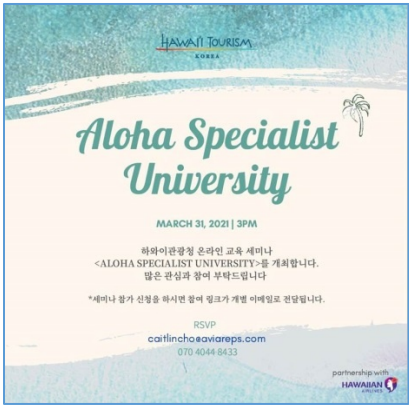
- **HTK social media channels:** HTK uploaded 4 social media posts as a series of virtual trip to Hawai'i contents under the theme of Hawaiian culture and history in March. The posts highlighted the Hawaiian term Kuleana, and visitor information on 3W's was introduced. HTK has submitted the April social calendar on Podio for final review and approval.



- **General consumer Inquiry:** HTK has been handling consumer inquiries mainly on TTP programs and providing related guidelines.

Travel Trade

- **2021 Aloha Specialist University:** HTK successfully launched 2021 Aloha Specialist University program which is quarterly online educational seminar targeting B2B partners and executed its first session on March 31. The program covered latest updates on TTP Program along with specific step by step guidelines on Safe Travel. HTK also introduced Mālama Hawai'i as the core value of the year and shared various cultural and historical attractions / activities in the Hawaiian Islands along with the latest 'open for business' list provided by HTA. Hawaiian Airlines participated as a partnership airline and presented current ICN-HNL route and announced its additional flight increase starting from April. Total 20 travel agencies including airlines partners participated to the seminar.



Public Relations

- **Media handling:** HTK has been in close contact with major media to provide up to date destination information and attend on their inquiries.
- **Press release:** HTK distributed a press released about the official launching of 2021 Aloha Specialist University Program.

Sales Activities

Sales Calls

Airline	Wholesaler/TA/TO/OTA	Other	Total
3	5	0	8

- **Summary of Sales Activities**

- **Airlines:** HTK held regular meetings with three major airline partners, KE, HA and OZ to share the latest market conditions and the status of flight from Incheon to Hawai'i.
- **Travel Agencies:** HTK held regular calls with the two major South Korean travel agencies, Hana Tour and Mode Tour and discussed current market status and updates on TTP Program.

Responsible Tourism Update

- HTK covered Mālama Hawai'i and introduced various cultural and historical attractions in the Hawaiian Islands through the Aloha Specialist University online seminar.

Coming Attractions for Leisure Market

What	When	Where
B2C newsletter distribution	3 rd week of April	Seoul
Social media development	April	Seoul

Agenda Item

7

Presentation and Discussion of Current Market Insights and Conditions in Hawaii and Key Major Hawaii Tourism Markets, Including the United States, Japan, Canada, Oceania, and Cruise



Market Insights – March 2021

The HTA Monthly Market Insights reports on the most recent key performance indicators that the Hawai'i Tourism Authority (HTA) uses to measure success. The following measures provide indicators of the overall health of Hawai'i's visitor industry and help to gauge if the HTA is successfully attaining its goals.

Report on Economic Impact

During March 2021, most passengers arriving from out-of-state and traveling inter-county could bypass the State's mandatory 10-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner through the state's Safe Travels program. All trans-Pacific travelers participating in the pre-travel testing program were required to have a negative test result before their departure to Hawai'i. Kaua'i County continued to temporarily suspend its participation in the state's Safe Travels program, making it mandatory for all trans-Pacific travelers to Kaua'i to quarantine upon arrival except for those participating in a pre- and post-travel testing program at a "resort bubble" property as a way to shorten their time in quarantine. The counties of Hawai'i, Maui and Kalawao (Moloka'i) also had a partial quarantine in place in March. In addition, the U.S. Centers for Disease Control and Prevention (CDC) continued to enforce the "Conditional Sailing Order" on all cruise ships.

For the first quarter of 2021, Hawai'i's tourism economy experienced:

- Total visitor spending was \$1.51 billion¹
- Total arrivals declined 60.1 percent from the same period last year to 847,044 visitors.
- Through March 2021, the state collected \$93.5 million in TAT, down 81.8 percent compared to FY 2020 through March 2020 (Preliminary data from Dept of Taxation).
- Total air capacity statewide dropped to 8,678 flights (-40.9%) and 1,791,410 seats (-44.9%).

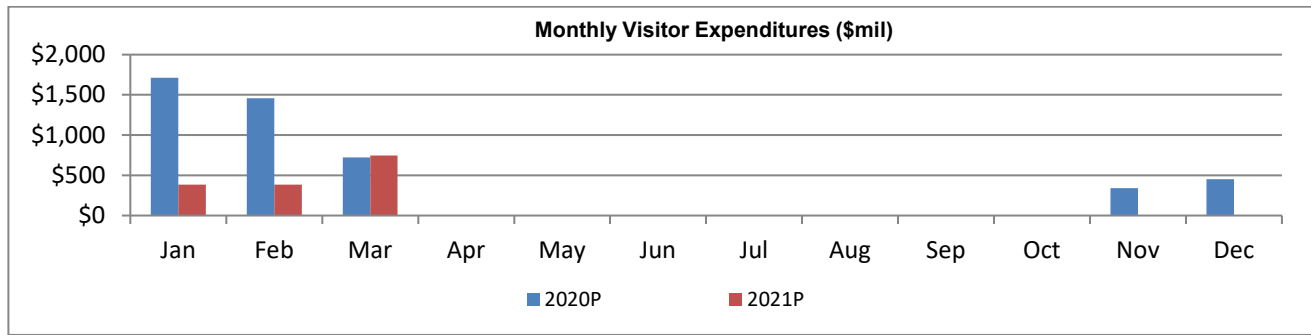
Table 1: Overall Key Performance Indicators – Total (Air + Cruise) – YTD March 2021

	YOY Rate	Mar. 2020 YTD	Mar. 2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil) ^{1/}	-61.1%	3,891.9	1,514.6	9,711.8
Daily Spend (\$PPPD) ^{1/}	-18.2%	198.9	162.8	185.4
Visitor Days	-52.4%	19,564,106	9,306,233	52,372,004
Arrivals	-60.1%	2,125,486	847,044	5,510,247
Daily Census	-51.9%	214,990	103,403	143,485
Airlift (scheduled seats)	-44.6%	56,847	1,785,543	11,882,593

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diiio Mi flight schedules as of March 16, 2021, subject to change.

^{1/}First quarter 2021 visitor spending statistics were from U.S. West, U.S. East, Japan, and Canada (Canada data were only available for January and February). Spending data for visitors from the other markets were not available due to limited samples

Figure 1: Monthly Visitor Expenditures (\$mil)



Major Market Areas (MMAs)

USA

Table 2: Key Performance Indicators - U.S. Total

	YOY Rate	Mar. 2020 YTD	Mar. 2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	-44.3%	2,667.6	1,486.5	7,833.4
Daily Spend (\$PPPD)	-15.4%	197.9	167.5	184.1
Visitor Days	-34.2%	13,478,807	8,872,874	42,553,079
Arrivals	-42.3%	1,423,192	820,847	4,403,876
Daily Census	-33.4%	148,119	98,587	116,584
Airlift (scheduled seats)	-27.4%	2,353,271	1,709,583	9,830,792

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of March 16, 2021, subject to change.

- The Conference Board Consumer Confidence Index surged in March 2021 to its highest reading in a year after a modest increase in February. The Index now stands at 109.7 (1985=100), up from 90.4 in February. The Present Situation Index based on consumers’ assessment of current business and labor market conditions climbed from 89.6 to 110.0. The Expectations Index based on consumers’ short-term outlook for income, business and labor market conditions also improved from 90.9 in February to 109.6 in March.
- Major U.S. wholesalers’ focus continues to be Hawai’i’s safety and protocol guide, travel insurance/protection, and travel advisor educational messaging.
- Wholesale partners are seeing positive trends and increased demand in week-over-week bookings. All are seeing sustained strength and the largest total booking pace since pre-pandemic levels. Demand for Kaua’i is cautiously optimistic due to its reentry into the Safe Travels Hawai’i program on April 5, 2021.
- The forecast for domestic scheduled nonstop air seats to Hawai’i for April - June 2021 will increase by 882.0 percent as compared with the same time period of 2020 (April 2020 was the first month of the 14-day quarantine and the immediate reduction of flights). The projection is based on flights appearing in Diio Mi airline schedules. Due to COVID-19, the constant fluidity in scheduled air seats is expected to continue in all major market areas including U.S. West (+787.0%) and U.S. East (+710.1%). The situation is being monitored and the forecast adjusted accordingly.

US WEST

Table 3: Key Performance Indicators - U.S. West

	YOY Rate	Mar. 2020 YTD	Mar. 2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	-35.0%	1,511.4	982.6	4,850.7
Daily Spend (\$PPPD)	-10.9%	184.9	164.8	173.0
Visitor Days	-27.0%	8,173,302	5,963,340	28,031,536
Arrivals	-37.0%	908,883	572,998	3,002,696
Daily Census	-26.2%	89,817	66,259	76,799
Airlift (scheduled seats)	-25.4%	2,022,576	1,509,348	8,530,031

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of March 16, 2021, subject to change.

- In March 2021, U.S. West visitors spent \$492.4 million (+55.4%), and their average daily spending was \$176 per person (-1.1%). Arrivals increased 47.4 percent from last March to 296,117 visitors. In the first quarter of 2021, U.S. West visitors spent \$982.6 million (-35.0%), and their average daily spending was \$165 per person (-10.9%). A total of 572,998 visitors were from U.S. West compared to 908,883 visitors in the same period last year.
- Key U.S. West markets had travel restrictions in place during March 2021. California residents were advised to quarantine for 10 days after re-entering their state. In Oregon, returning residents were advised to self-quarantine for 14 days after their return. Quarantine recommendations did not apply to returning residents who were fully vaccinated for COVID-19 and had no COVID-19 symptoms. In Washington, all air passengers were required to obtain a negative viral COVID-19 test within 3 days of departure. In addition, returning Washington residents were directed to self-quarantine for 14 days after out-of-state travel.

US EAST

Table 4: Key Performance Indicators - U.S. East

	YOY Rate	Mar. 2020 YTD	Mar. 2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	-56.4%	1,156.3	503.8	2,982.6
Daily Spend (\$PPPD)	-20.5%	217.9	173.2	205.4
Visitor Days	-45.2%	5,305,505	2,909,534	14,521,543
Arrivals	-51.8%	514,309	247,849	1,401,180
Daily Census	-44.6%	58,302	32,328	39,785
Airlift (scheduled seats)	-39.5%	330,695	200,235	1,300,761

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of March 16, 2021, subject to change.

- In March 2021, U.S. East visitors spent \$249.8 million (+8.4%) and \$188 per person, per day (-6.5%). Arrivals increased to 10.8 percent to 133,162 visitors. In the first quarter of 2021, U.S. East visitors spent \$503.8 million (-56.4%), and their average daily spending was \$173 per person (-20.5%). A total of 247,849 visitors came from U.S. East compared to 514,309 visitors in the same period last year.
- In New York, all travelers, including returning residents, had the option to “test out” of the mandatory 10-day quarantine for asymptomatic individuals. A COVID-19 test was required within three days before their return to New York, followed by three days of quarantine. On the fourth day of their quarantine, a second COVID-19 test was required. If both tests came back negative, they could exit quarantine early upon receipt of the second negative test.

CANADA

Table 5: Key Performance Indicators – Canada

	YOY Rate	Mar. 2020 YTD	Mar. 2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil) ^{2/}	-95.2%	361.5	17.2	449.3
Daily Spend (\$PPPD) ^{2/}	-10.8%	176.1	157.0	168.6
Visitor Days	-94.7%	2,053,433	109,574	2,664,375
Arrivals	-97.6%	155,735	3,716	195,431
Daily Census	-94.6%	22,565	1,217	7,300
Airlift (scheduled seats)	-93.8%	164,881	10,232	245,510

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Dijo Mi flight schedules as of March 16, 2021, subject to change.

^{2/}Year-to-date 2021 visitor spending statistics were only for January and February. March 2021 spending data were not available due to limited samples.

- There were 326 visitors (-98.8%) from Canada in March 2021. In the first quarter of 2021, arrivals dropped considerably (-97.6% to 3,716 visitors) compared to the same period last year.
- In March 2021, most travelers to Canada, including returning Canadian nationals, were required to take a COVID-19 molecular test when they arrive in Canada before exiting the airport, and another toward the end of their mandatory 14-day quarantine period. Effective February 18, most air travelers, were required to reserve, prior to departure to Canada, a three-night stay in a government-authorized hotel. In addition, they were required to submit their travel and contact information, including a suitable quarantine plan, electronically via ArriveCAN before boarding their flight.
- Canada's economy is forecasted to expand by 5.8 percent this year and 4.0 percent in 2022, thanks to the rollout of vaccines, which has led to a gradual reopening of the economy and boosted confidence.
- Consumer confidence continued to climb in March, reaching 105.2 points. This was the largest monthly increase since June 2020 pushing the rating up to 87 percent of its pre-pandemic level (120.6). With lockdown measures gradually easing and increased vaccine availability, Canadians are much more optimistic about the future. Consumers were more satisfied with their current financial situation and more than one-quarter of respondents believe the job market will be better six months from now—a historically high share of positive responses. This optimism resulted in improved purchase sentiment as 24 percent of respondents thought it was a good time to make a major purchase—the highest level recorded in the past year.
- The loonie gained strength throughout the first two months of 2021 reaching an average of USD \$0.787, a 3.7 percent increase over 2020.

JAPAN

Table 6: Key Performance Indicators – Japan

	YOY Rate	Mar. 2020 YTD	Mar. 2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	-97.4%	415.7	10.9	454.4
Daily Spend (\$PPPD)	-14.4%	240.4	205.8	227.4
Visitor Days	-96.9%	1,729,323	53,183	1,998,302
Arrivals	-99.0%	294,228	2,910	347,802
Daily Census	-96.9%	19,004	591	5,475
Airlift (scheduled seats)	-93.4%	465,328	30,717	1,187,421

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Dijo Mi flight schedules as of March 16, 2021, subject to change.

- In March 2021, 1,051 visitors (-97.7%) arrived from Japan. Visitor spending was \$3.7 million (-94.5%), and the daily spending was \$213 per person, per day (-10.9%). In the first quarter of 2021, Japanese visitors spent \$10.9 million (-97.4%), and their average daily spending was \$206 per person (-14.4%). Arrivals were down significantly (-99.0% to 2,910 visitors) compared to the same period last year.
- In March, the Japan government required proof of a negative PCR test for all entry into Japan. In addition, all travelers, including returning Japanese nationals were required to quarantine for 14 days.
- Japan's economy expanded more than expected in Quarter 4, 2020 based on government data. According to private research institutes, 2021 GDP predicted to grow 3.9 percent from the previous year. Due to the 2nd state of emergency, consumption decreased in Quarter 1, 2021. However, economists are optimistic for recovery starting Quarter 2. Twelve private think-tank forecasted 2021 real GDP growth between 5.1 percent and 3.3 percent.
- Japan government lifted the 2nd state of emergency from rest of 4 Tokyo metro prefectures (Tokyo, Kanagawa, Chiba and Saitama) on March 21, 2021. However, the government has regulated business activities to monitor the current condition of COVID-19 surge.
- Starting February 17, 2021, Japan launched its COVID-19 inoculation drive administering the vaccine to hospital workers, as Prime Minister Suga attempts to beat the odds and host the Olympics this summer. Japan is in the process of vaccinating 4.8 million healthcare workers and plans to expand the vaccine rollout to people aged 65 or older, a group of about 36 million, in mid-April.
- Japan government announced operating Tokyo Olympic with no foreign spectators allowed and these conditions accepted by IOC as well. Under the conditions, the government continues foreign entry restriction, travel advise level 2, suspension of Business and Residence track until further notice.
- Japan National Tourism Organization (JNTO) announced Japanese outbound for February 2021 as 24,807 passengers (-98.1% vs 2020). Since April 2020, the number of outbound travelers has declined around 90 percent consecutively in the last 11 months.
- Airline Operation: Total 30 flights with 7,684 air seats to Hawai'i in March 2021 by ANA, Hawaiian and JAL. April 2021 forecast: 35 flights with 8,798 seats. May 2021 forecast: 34 flights with 8,428 seats.
- Pre-clearance: Hawaiian Airlines (HA) (Narita & Kansai flights) and Japan Airlines (JAL) (Haneda flights) started Pre-Clearance service from March. If their passengers are able to submit the Hawai'i's pre-testing requirements, their arrival experience at Honolulu Airport will be faster and smoother. HA started from 3/16 for Narita, 3/18 for Kansai. JAL started from 3/26.
- Airline Suspension: Delta (until 7/1); United (until 6/3); Korean (Until 5/31).

OCEANIA

Table 7: Key Performance Indicators – Oceania

	YOY Rate	Mar. 2020 YTD	Mar. 2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil) ^{3/}	N/A	143.6	N/A	202.8
Daily Spend (\$PPPD) ^{3/}	N/A	253.6	N/A	258.0
Visitor Days	-98.7%	566,239	7,147	786,033
Arrivals	-99.5%	60,749	320	82,654
Daily Census	-98.7%	6,222	79	2,154
Airlift (scheduled seats)	-100.0%	95,737	0	137,772

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of March 16, 2021, subject to change.

^{3/} Year-to-date 2021 visitor spending data for January-March were not available due to limited samples.

- Australia: Visitor arrivals declined considerably (-99.7% to 29 visitors) in March and through the first quarter of 2021 (-99.8% to 103 visitors) compared to the same period last year. There were no direct flights from Australia.
- The Government continued to impose a ban on all overseas travel for Australians, unless an exemption was granted. Residents returning to Australia must quarantine for 14 days.
- A number of major COVID-19 restrictions eased across Australia this month, allowing larger gatherings, easing of density limits across all venues and reducing mask wearing. The Australian economy is predicted to rebound faster than expected from the coronavirus recession, reaching its pre-pandemic level within weeks, but it will continue to be supported by record-low interest rates for years. The International Monetary Fund has forecast the Australian economy to expand 4.5 percent this year after shrinking by 2.4 percent in 2020. It is a substantial upgrade to the fund's January forecasts when it expected the Australian economy to grow by 3.5 percent this year after contracting by 2.9 percent in 2020.
- At the end of March 2021, business confidence hit a 7-year high despite the approaching end of JobKeeper wage subsidy – according to Roy Morgan Business Confidence statistics, 59.4 percent of businesses said the next 12 months is a 'good time to invest'. March saw a slight softening of the AU Dollar although it is still offering great value against the US Dollar at \$0.76.
- New Zealand: Visitor arrivals plummeted (-96.1% to 114 visitors) in March and through the first quarter of 2021 (-98.0% to 218 visitors) compared to a year ago. There were no direct flights from New Zealand.
- The New Zealand domestic economy continues to operate without major restrictions due to the strict border controls and approach to keeping COVID-19 out of the community. The upcoming opening of the Trans-Tasman bubble between Australia and New Zealand (mid-April) is great news not just for tourism, but for the important business transfer between the two countries.
- The NZ Dollar softened slightly over March, ending the month trading at US\$0.70.

EUROPE

Table 8: Key Performance Indicators – Europe

	YOY Rate	Mar. 2020 YTD	Mar. 2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil) ^{4/}	N/A	38.4	N/A	106.4
Daily Spend (\$PPPD) ^{4/}	N/A	143.0	N/A	146.7
Visitor Days	-92.1%	268,300	21,294	725,338
Arrivals	-94.2%	20,395	1,191	55,102
Daily Census	-92.0%	2,948	237	1,987
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

* DBEDT 2021 annual forecast (Quarter 1, 2021).

^{4/} Year-to-date 2021 visitor spending data for January-March were not available due to limited samples.

- Visitor arrivals from the United Kingdom, France, Germany, Italy and Switzerland declined (-85.8% to 539 visitors) in March and through the first quarter of 2021 (-94.2% to 1,191 visitors) compared to the same period a year ago.
- Germany remained in lockdown and non-essential services were closed since mid-December 2020. Travelers entering Germany from countries classified as high-incidence areas were required to present a negative test result before their flight and subject to quarantine for 10 days. The United Kingdom continued to be in lockdown and nonessential businesses remained closed in March. All travelers entering the U.K., including British citizens, had to present a negative COVID-19 test taken within 72 hours of arrival. U.K. nationals who returned from countries considered as high-risk by the U.K. government must quarantine for 10 days.

OTHER ASIA

Table 9: Key Performance Indicators – Other Asia

	YOY Rate	Mar. 2020 YTD	Mar. 2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil) ^{5/}	N/A	120.4	N/A	NA
Daily Spend (\$PPPD) ^{5/}	N/A	263.8	N/A	NA
Visitor Days	-93.7%	456,405	28,958	NA
Arrivals	-97.5%	53,689	1,355	NA
Daily Census	-95.8%	7,607	322	NA
Airlift (scheduled seats)	-100.0%	72,897	0	245,134

* DBEDT 2021 annual forecast is not available. 2021 seats forecast by HTA, based on Diio Mi flight schedules as of March 16, 2021, subject to change.

^{5/} Year-to-date 2021 visitor spending data for January-March were not available due to limited samples.

- Visitor arrivals from Other Asia (China, Hong Kong, Korea, Singapore, Taiwan) dropped (-82.1% to 580 visitors) in March and through the first quarter of 2021 (-97.6% to 1,355 visitors) compared to a year ago.

KOREA

Table 10: Key Performance Indicators – Korea

	YOY Rate	Mar. 2020 YTD	Mar. 2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil) ^{6/}	N/A	89.8	N/A	127.0
Daily Spend (\$PPPD) ^{6/}	N/A	259.5	N/A	278.2
Visitor Days	-93.7%	346,142	21,880	456,698
Arrivals	-98.1%	41,614	778	55,102
Daily Census	-93.6%	3,804	243	1,251
Airlift (scheduled seats)	-94.9%	70,957	3,614	214,534

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Dijo Mi flight schedules as of March 16, 2021, subject to change.

^{6/} Year-to-date 2021 visitor spending data for January-March were not available due to limited samples.

- Arrivals from Korea dropped (-87.2% to 306 visitors per day) in March and through the first quarter of 2021 (-98.1% to 778 visitors per day) compared to a year ago.
- All travelers to Korea, including returning Korean nationals, were required to have a negative COVID-19 PCR test and subject to a mandatory 14-day quarantine.
- South Korea's exports advanced 16.6 percent to US\$53.8 billion in March from a year earlier and marked the highest ever in March of all time. It is the largest increase in two years and five months, double-digit growth following January, and five consecutive months of growth. Imports rose 18.8 percent to \$49.65 billion in March and the trade surplus reached \$4.17 billion, marking the 11th consecutive month of surplus.
- South Korea's consumer sentiment rose for a third consecutive month in March, as exports showed signs of a modest recovery amid the COVID-19 vaccine rollout. According to the Bank of Korea, the composite consumer sentiment index (CCSI) came in at 100.5 for March, up 3.1 points from the previous month.
- The average USD/WON exchange rate in March was 1,131.00 won, a slight increase from the previous rate of 1,111.72 won in February.
- The Korean government will introduce vaccine passport app in April for immunized citizens, and it will allow travelers to show digital proof of vaccination. The app will be developed with blockchain technology to prevent counterfeit, and protect personal information.
- Korean Air and Asiana Airlines extended its suspension of flight services on ICN-HNL route until May 31.
- Hawaiian Airlines has increased its weekly ICN-HNL service to 2 weekly flights starting April 4, which operates every Friday and Sunday.

LATIN AMERICA

Table 11: Key Performance Indicators – Latin America

	YOY Rate	Mar. 2020 YTD	Mar. 2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil) ^{7/}	N/A	12.5	N/A	NA
Daily Spend (\$PPPD) ^{7/}	N/A	234.4	N/A	NA
Visitor Days	-75.0%	53,153	13,281	NA
Arrivals	-83.4%	5,057	839	NA
Daily Census	-74.7%	584	148	NA
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

*DBEDT 2021 annual forecast is not available.

^{7/} Year-to-date 2021 visitor spending data for January-March were not available due to limited samples.

- Visitor arrivals from Mexico, Brazil and Argentina dropped (-54.4% to 365 visitors per day) in March and through the first quarter of 2021 (-83.4% to 839 visitors per day) compared to a year ago.
- In Argentina, the government extended the measure to close Argentina's borders to tourism until March 12. All incoming travelers including returning nationals were required to have a valid negative PCR test completed up to 72 hours before travel, and subject to a 7-day quarantine. In Mexico, the U.S.-Mexico land border continued to be closed through at least April 2021, to non-essential crossings but not commerce. Returning Mexican nationals who traveled by air were subject to temperature checks and health screening and may be subjected to quarantine.

ISLAND VISITATION:

- **Oahu:** In March 2021, visitor spending was \$260.0 million⁷. There were 206,942 visitors on O'ahu, down 13.2 percent compared to March 2020. However, a longer length of stay (+15.7% to 8.49 days) resulted in a slight increase in total visitor days (+0.5%). For the first quarter of 2021, visitors spending was \$523.2 million⁸. Arrivals dropped 68.0 percent compared to the same period last year to 391,333 visitors.
- **Maui** In March, visitor spending was \$330.1 million⁸. Arrivals to Maui increased to 170,750 visitors (+35.6%) and total visitor days rose 43.5 percent. For the first quarter of 2021, visitor spending was \$669.1 million⁹. Arrivals decreased -45.2 percent to 330,283 visitors.
- **Hawai'i Island:** In March, visitor spending was \$129.6 million⁸. Arrivals to Hawai'i Island increased to 82,687 visitors (+5.5%) and total visitor days rose 19.8 percent. For the first quarter of 2021, visitor spending was \$270.0 million⁹. Arrivals declined -58.1 percent to 163,533 visitors.
- **Kaua'i:** In March, visitors spending was \$26.3 million⁸. Arrivals to Kaua'i dropped to 15,133 visitors (-73.4%) and total visitor days decreased 64.5 percent. For the first quarter of 2021, visitor spending was \$52.3 million⁹. Arrivals (-90.6% to 26,469 visitors) decreased considerably compared to the same period last year.

⁷For March 2021, visitor spending statistics by island were from U.S. West, U.S. East and Japan only. Spending data for visitors from the other markets were not available due to limited samples.

⁹First quarter 2021 visitor spending statistics by island were from U.S. West, U.S. East, Japan, and Canada (Canada data were only available for January and February). Spending data for visitors from the other markets were not available due to limited samples.

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Mar-21** Preliminary

Visitor Industry Performance Measures

Market: **OVERALL**

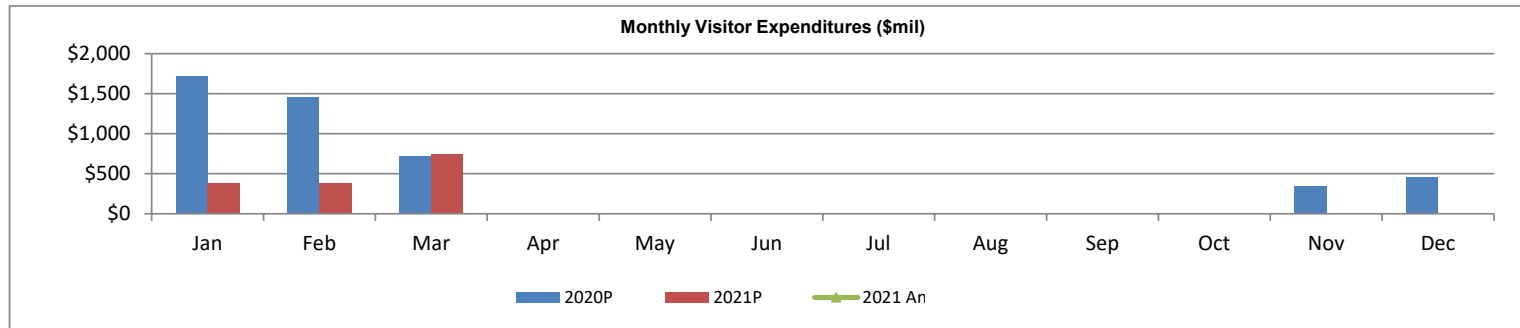
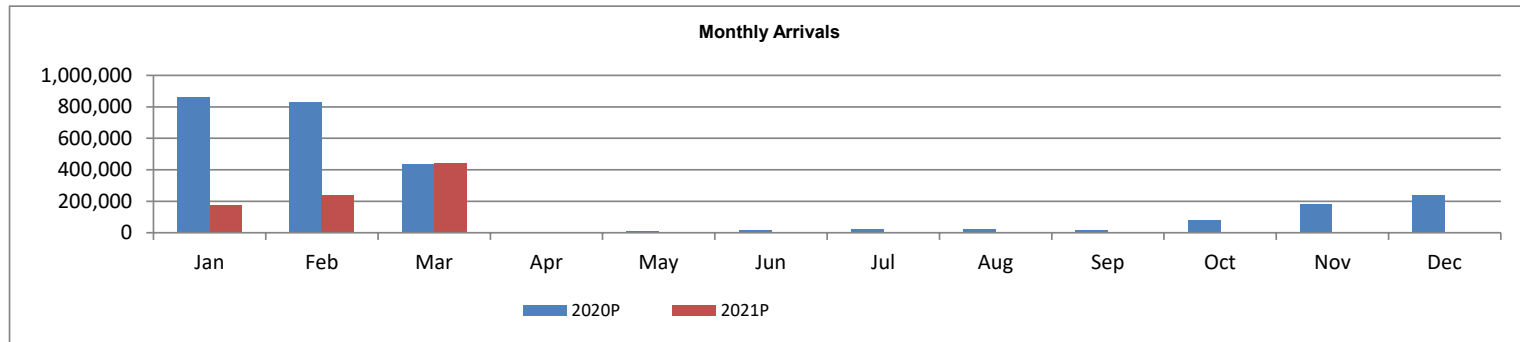
Key Performance Indicators

	YOY Rate	Mar'20 YTD	Mar'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{1/}	-61.1%	3,891.9	1,514.6	9,711.8	O'ahu	-68.0%	391,333
Daily Spend (\$PPPD) ^{1/}	-18.2%	198.9	162.8	185.4	Maui	-45.2%	330,283
Visitor Days	-52.4%	19,564,106	9,306,233	52,372,004	Moloka'i	-75.7%	3,477
Arrivals	-60.1%	2,125,486	847,044	5,510,247	Lāna'i	-65.4%	5,148
Daily Census	-51.9%	214,990	103,403	143,485	Kaua'i	-90.6%	26,469
Airlift (scheduled seats)	-44.6%	56,847	1,785,543	11,882,593	Hawai'i Island	-58.1%	163,533

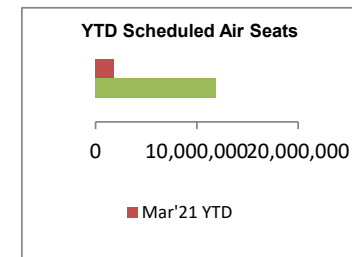
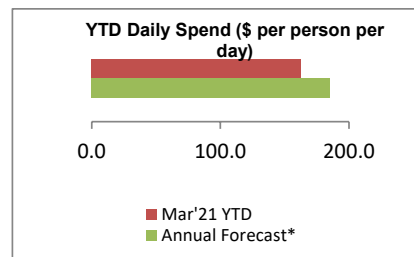
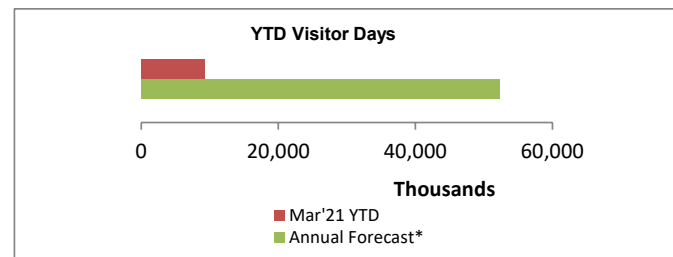
*DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.

^{1/}Year-to-date visitor spending statistics were from U.S. West, U.S. East, Japan, and Canada (Canada data were only available for January and February). Spending data for visitors from the other markets were not available.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Mar-21** Preliminary

Visitor Industry Performance Measures

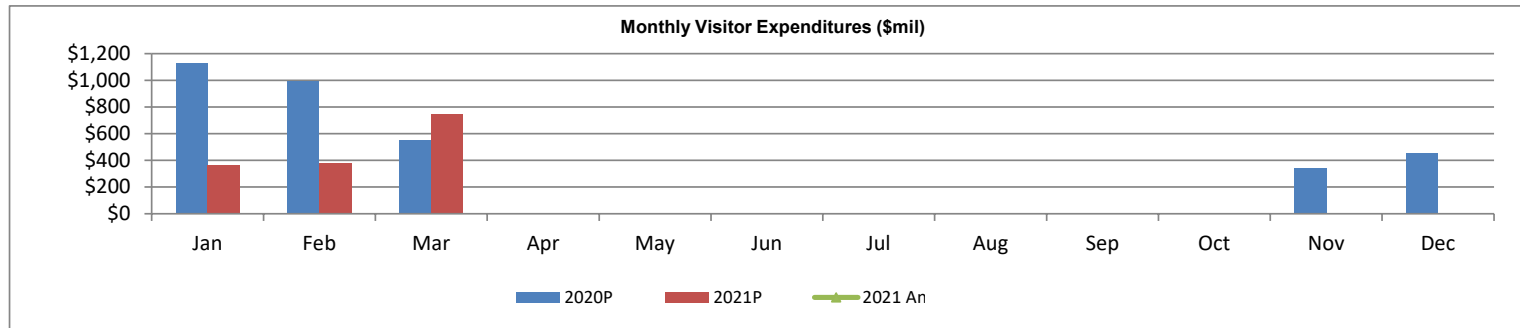
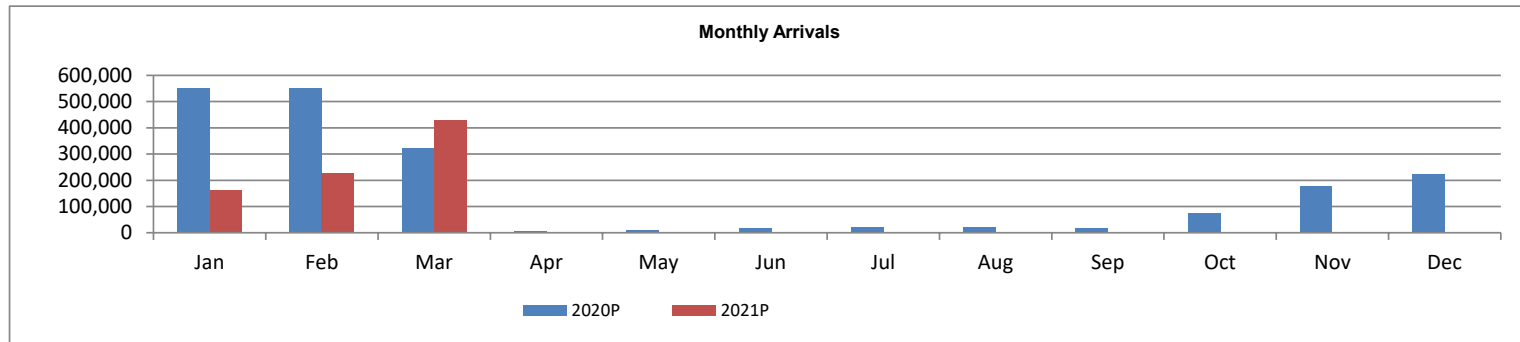
Market: **U.S. TOTAL**

Key Performance Indicators

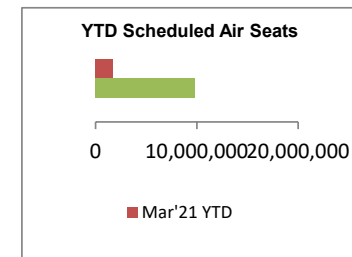
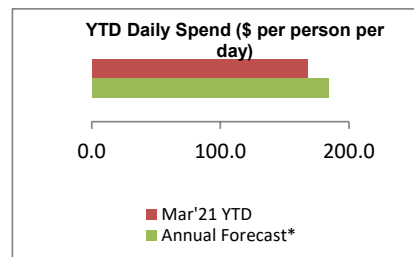
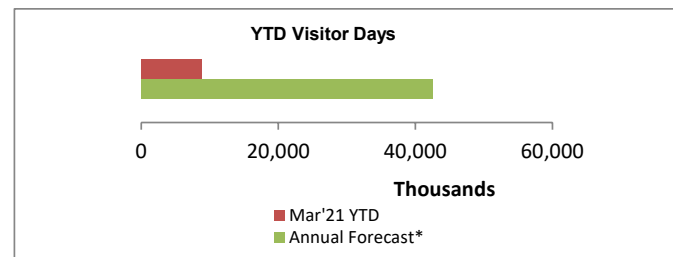
	YOY Rate	Mar'20 YTD	Mar'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	-44.3%	2,667.6	1,486.5	7,833.4	O'ahu	-45.7%	375,511
Daily Spend (\$PPPD)	-15.4%	197.9	167.5	184.1	Maui	-32.5%	322,495
Visitor Days	-34.2%	13,478,807	8,872,874	42,553,079	Moloka'i	-65.1%	3,370
Arrivals	-42.3%	1,423,192	820,847	4,403,876	Lāna'i	-56.8%	4,986
Daily Census	-33.4%	148,119	98,587	116,584	Kaua'i	-89.0%	25,676
Airlift (scheduled seats)	-27.4%	2,353,271	1,709,583	9,830,792	Hawai'i Island	-43.1%	159,565

*DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Mar-21** Preliminary

Visitor Industry Performance Measures

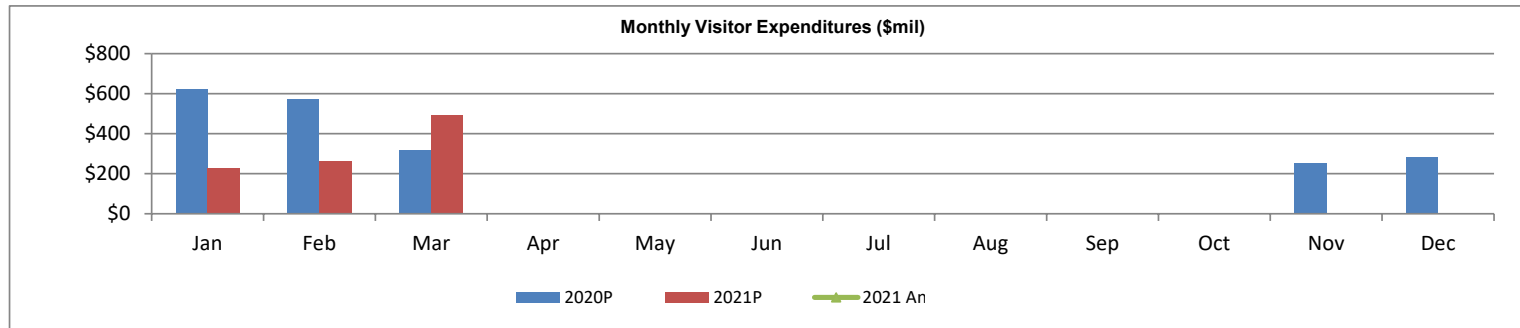
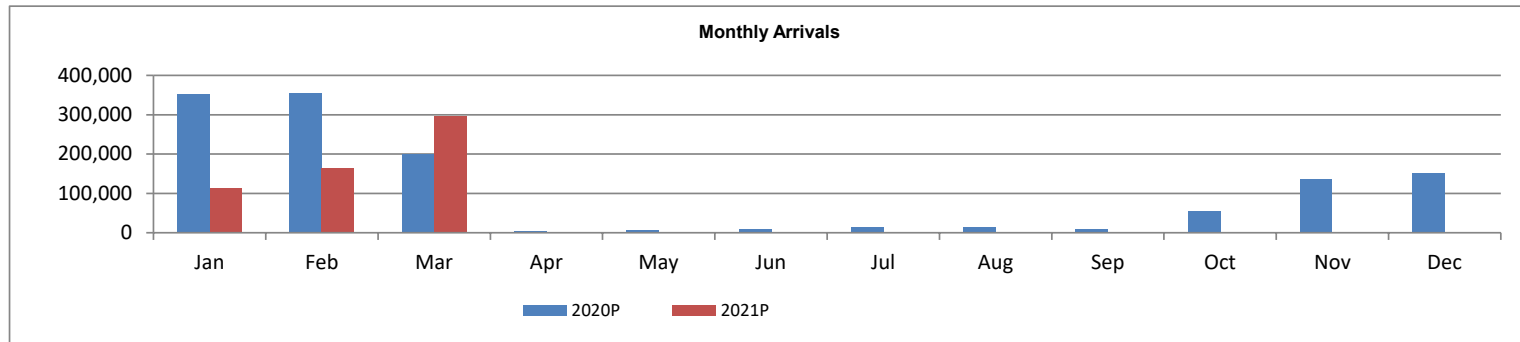
Market: **U.S. WEST**

Key Performance Indicators

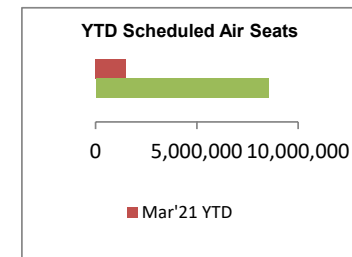
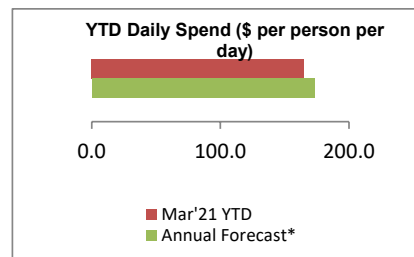
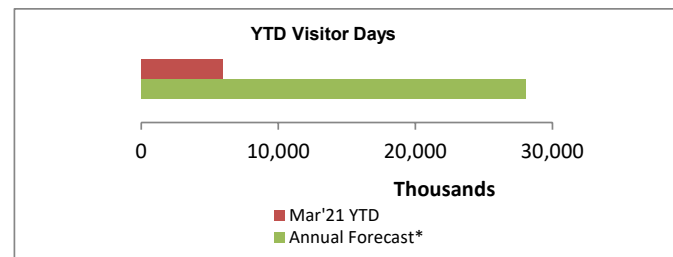
	YOY Rate	Mar'20 YTD	Mar'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	-35.0%	1,511.4	982.6	4,850.7	O'ahu	-40.4%	240,617
Daily Spend (\$PPPD)	-10.9%	184.9	164.8	173.0	Maui	-20.9%	233,167
Visitor Days	-27.0%	8,173,302	5,963,340	28,031,536	Moloka'i	-60.6%	2,255
Arrivals	-37.0%	908,883	572,998	3,002,696	Lāna'i	-49.7%	3,075
Daily Census	-26.2%	89,817	66,259	76,799	Kaua'i	-88.6%	16,205
Airlift (scheduled seats)	-25.4%	2,022,576	1,509,348	8,530,031	Hawai'i Island	-34.3%	113,834

*DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Mar-21** Preliminary

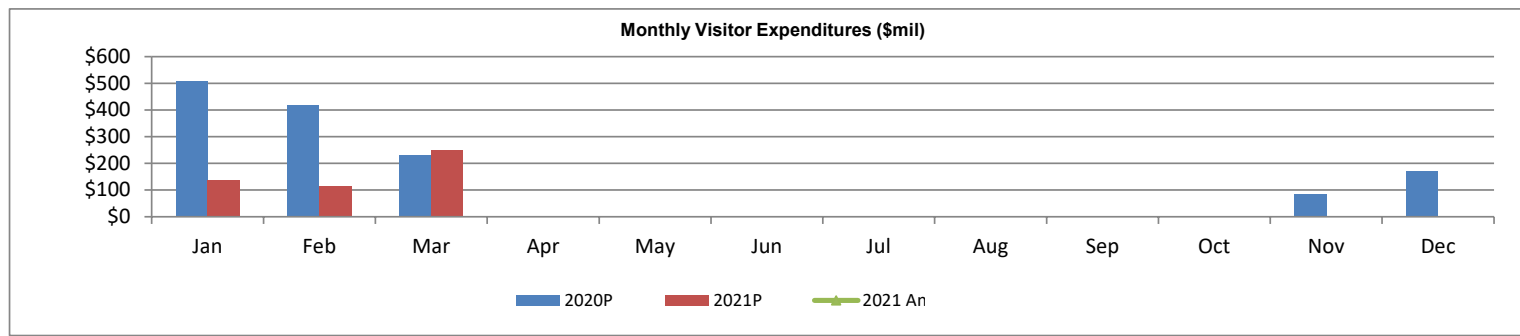
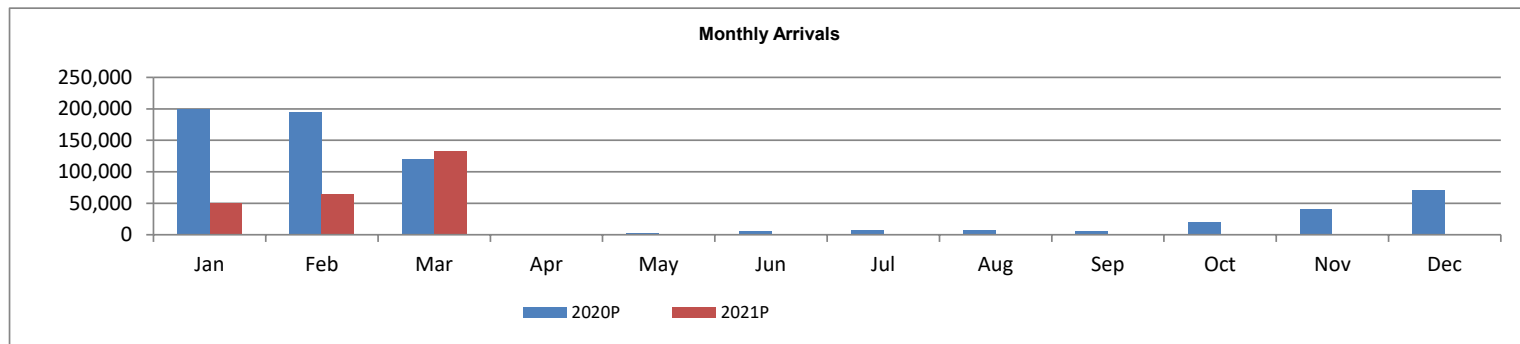
Visitor Industry Performance Measures

Market: **U.S. EAST**

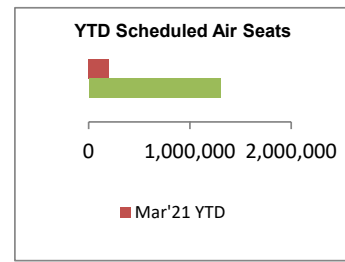
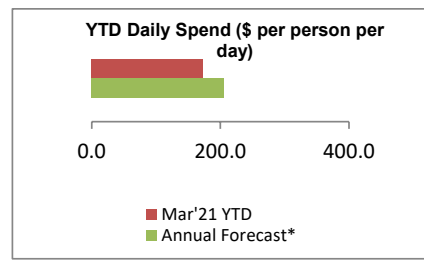
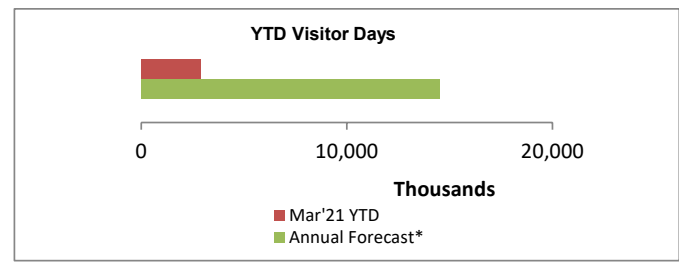
Key Performance Indicators					Arrivals	YOY Rate	YTD
	YOY Rate	Mar'20 YTD	Mar'21 YTD	Annual Forecast*			
Visitor Spending (\$mil)	-56.4%	1,156.3	503.8	2,982.6	O'ahu	-53.2%	134,894
Daily Spend (\$PPPD)	-20.5%	217.9	173.2	205.4	Maui	-51.2%	89,328
Visitor Days	-45.2%	5,305,505	2,909,534	14,521,543	Moloka'i	-71.6%	1,115
Arrivals	-51.8%	514,309	247,849	1,401,180	Lāna'i	-64.7%	1,911
Daily Census	-44.6%	58,302	32,328	39,785	Kaua'i	-89.5%	9,471
Airlift (scheduled seats)	-39.5%	330,695	200,235	1,300,761	Hawai'i Island	-57.4%	45,732

*DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Mar-21** Preliminary

Visitor Industry Performance Measures

Market: **CANADA**

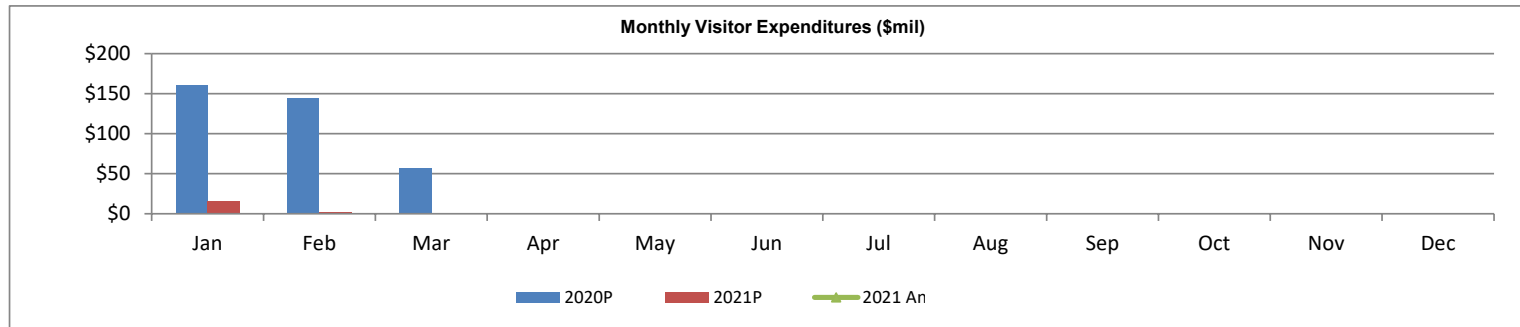
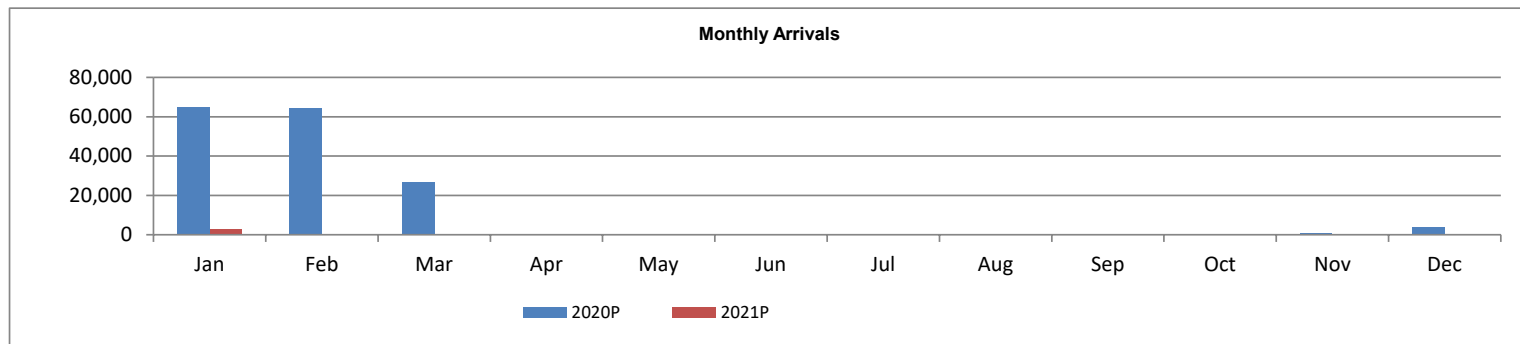
Key Performance Indicators

	YOY Rate	Mar'20 YTD	Mar'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{2/}	N/A	361.5	17.2	449.3	O'ahu	-98.2%	1,110
Daily Spend (\$PPPD) ^{2/}	N/A	176.1	157.0	168.6	Maui	-97.0%	2,118
Visitor Days	-94.7%	2,053,433	109,574	2,664,375	Moloka'i	-99.4%	6
Arrivals	-97.6%	155,735	3,716	195,431	Lāna'i	-98.1%	29
Daily Census	-94.6%	22,565	1,217	7,300	Kaua'i	-99.8%	53
Airlift (scheduled seats)	-93.8%	164,881	10,232	245,510	Hawai'i Island	-98.3%	620

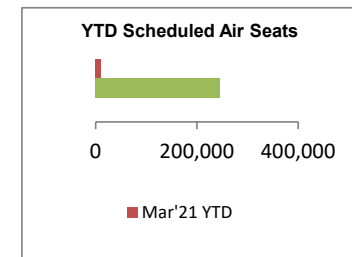
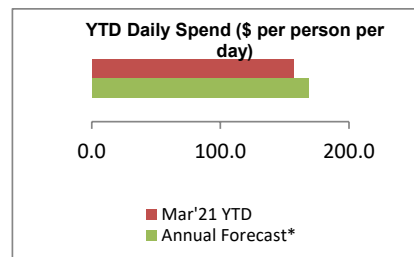
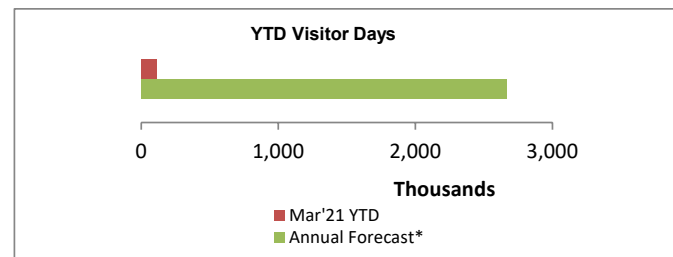
*DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.

^{2/} Year-to-date 2021 visitor spending statistics were only for January and February. March 2021 spending data were not available due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Mar-21** Preliminary

Visitor Industry Performance Measures

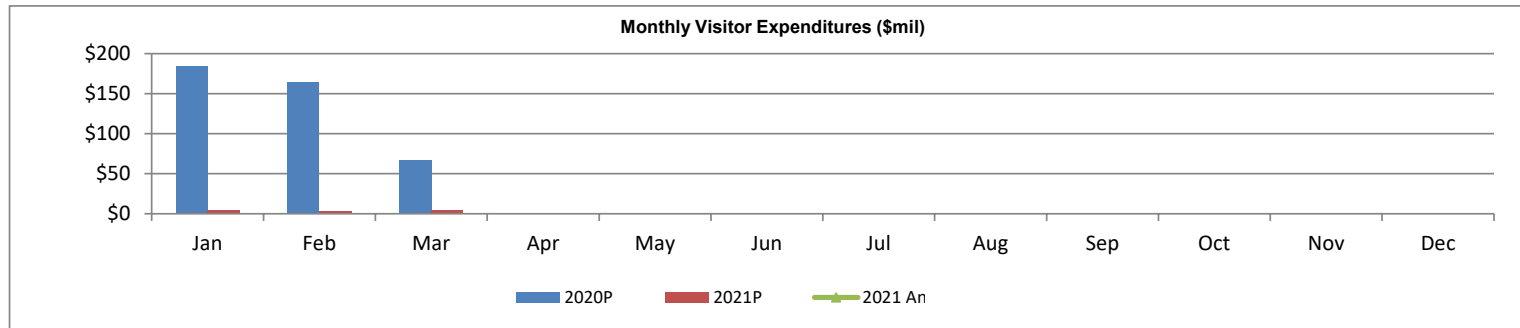
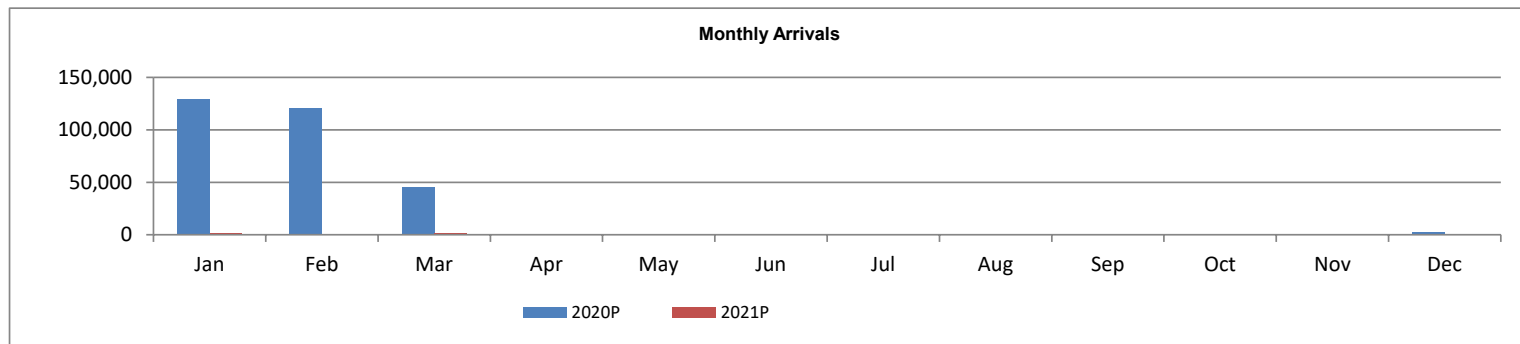
Market: **JAPAN**

Key Performance Indicators

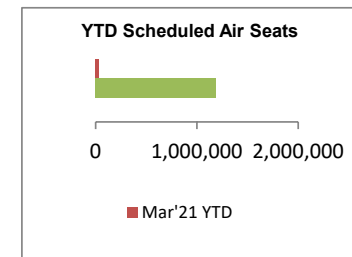
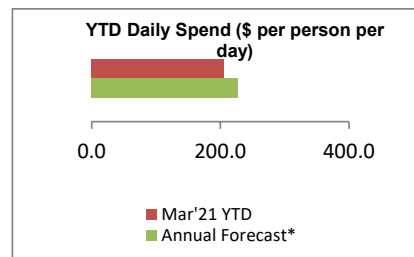
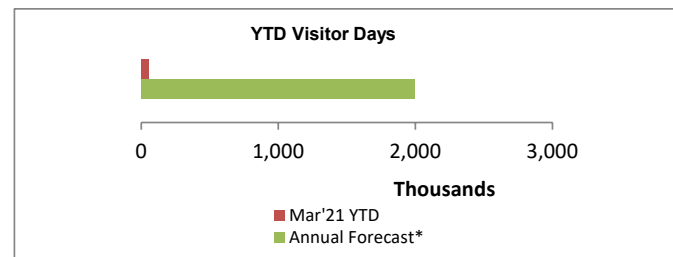
	YOY Rate	Mar'20 YTD	Mar'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil)	-97.4%	415.7	10.9	454.4	O'ahu	-99.0%	2,812
Daily Spend (\$PPPD)	-14.4%	240.4	205.8	227.4	Maui	-99.3%	60
Visitor Days	-96.9%	1,729,323	53,183	1,998,302	Moloka'i	-99.2%	3
Arrivals	-99.0%	294,228	2,910	347,802	Lāna'i	-98.2%	2
Daily Census	-96.9%	19,004	591	5,475	Kaua'i	-99.6%	15
Airlift (scheduled seats)	-93.4%	465,328	30,717	1,187,421	Hawai'i Island	-99.7%	94

*DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

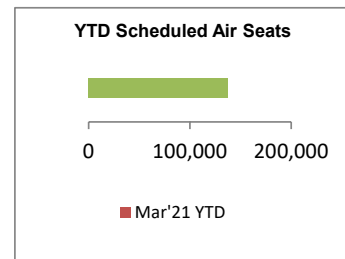
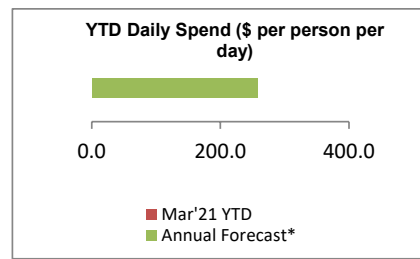
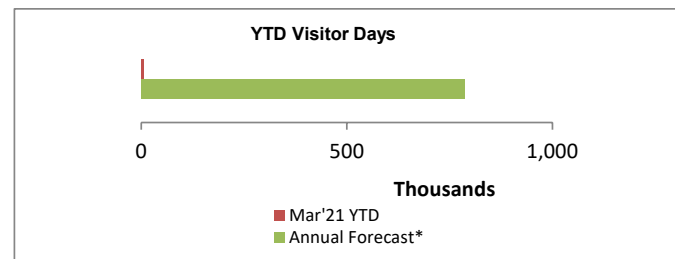
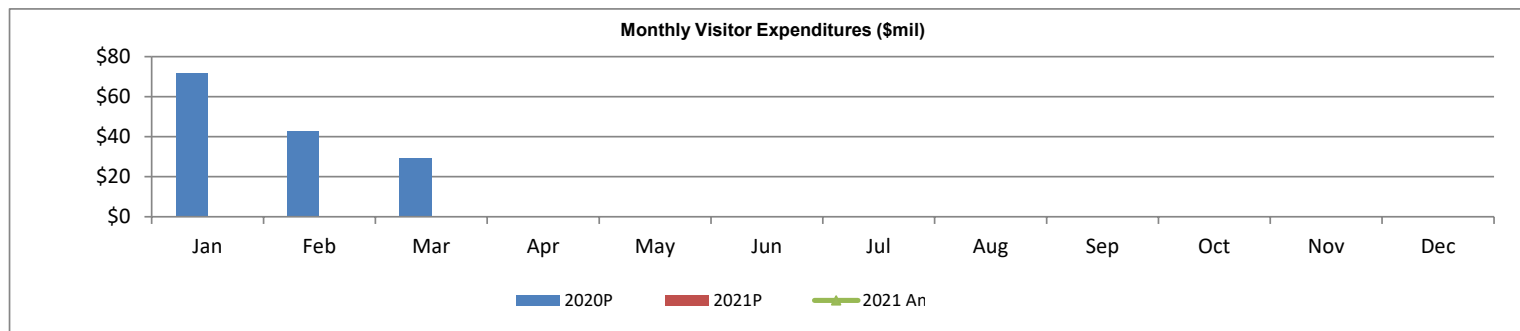
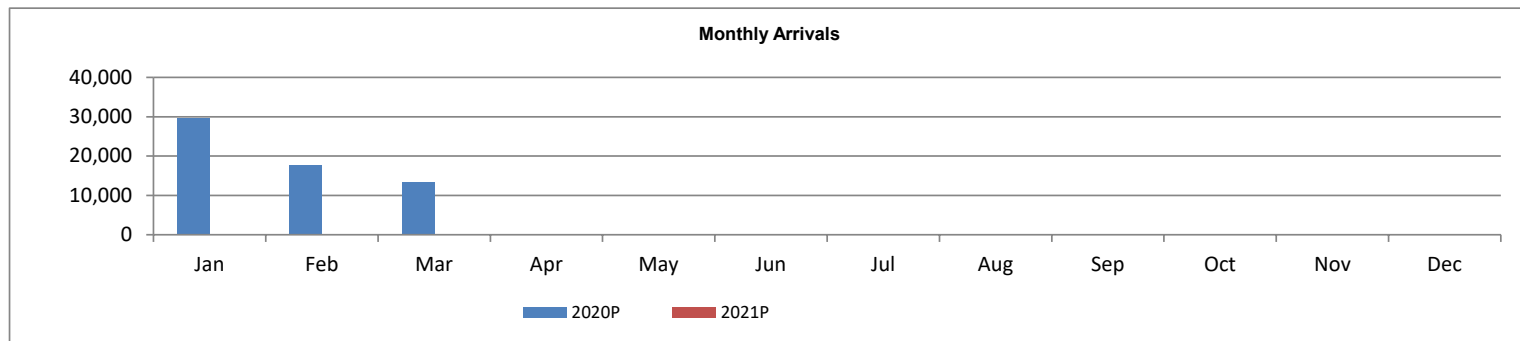
Hawai'i Tourism Authority	Report Date:	Mar-21	Preliminary
Visitor Industry Performance Measures			
Market: OCEANIA			

	YOY Rate	Mar'20 YTD	Mar'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{3/}	N/A	143.6	N/A	202.8	O'ahu	-99.7%	172
Daily Spend (\$PPPD) ^{3/}	N/A	253.6	N/A	258.0	Maui	-98.9%	95
Visitor Days	-98.7%	566,239	7,147	786,033	Moloka'i	-100.0%	-
Arrivals	-99.5%	60,749	320	82,654	Lāna'i	-100.0%	-
Daily Census	-98.7%	6,222	79	2,154	Kaua'i	-99.3%	34
Airlift (scheduled seats)	-100.0%	95,737	0	137,772	Hawai'i Island	-99.2%	58

*DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.

^{3/} Year-to-date 2021 visitor spending data for January-March were not available due to limited samples

Monthly Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Mar-21** Preliminary

Visitor Industry Performance Measures

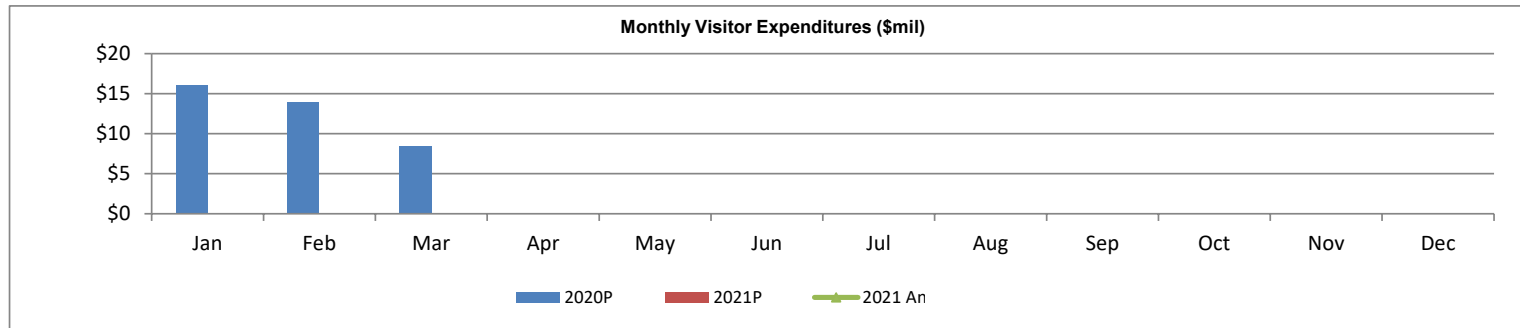
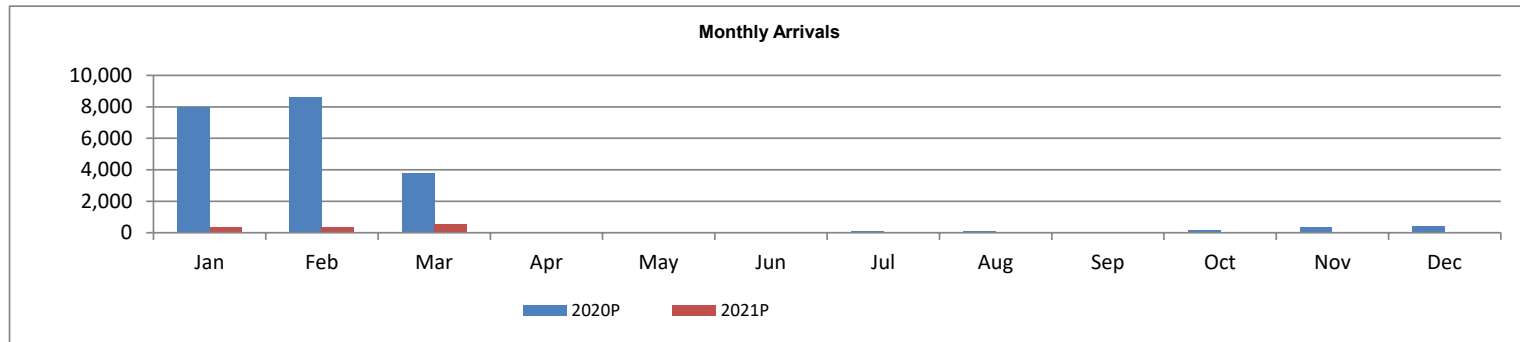
Market: **EUROPE**

Key Performance Indicators

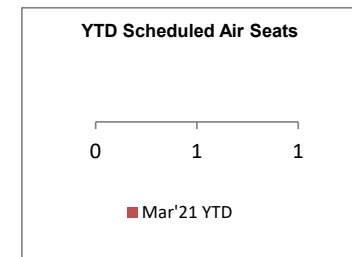
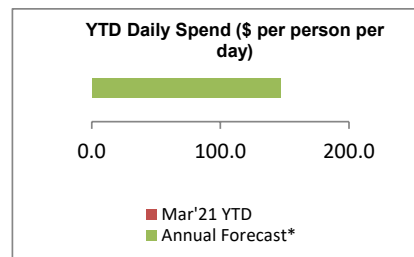
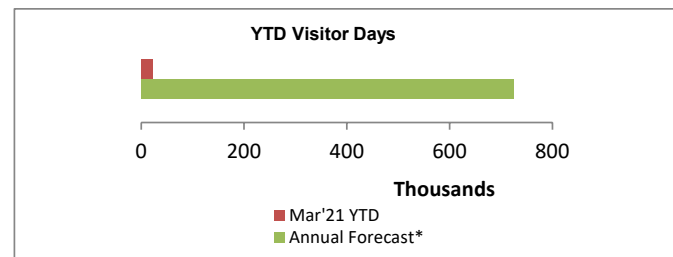
	YOY Rate	Mar'20 YTD	Mar'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{4/}	N/A	38.4	N/A	106.4	O'ahu	-95.5%	660
Daily Spend (\$PPPD) ^{4/}	N/A	143.0	N/A	146.7	Maui	-95.7%	355
Visitor Days	-92.1%	268,300	21,294	725,338	Moloka'i	-97.3%	10
Arrivals	-94.2%	20,395	1,191	55,102	Lāna'i	-96.5%	8
Daily Census	-92.0%	2,948	237	1,987	Kaua'i	-97.7%	115
Airlift (scheduled seats)	N/A	N/A	N/A	N/A	Hawai'i Island	-95.6%	284

^{4/}DBEDT Annual Forecast as of Q1 2021.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Mar-21** Preliminary

Visitor Industry Performance Measures

Market: **OTHER ASIA**

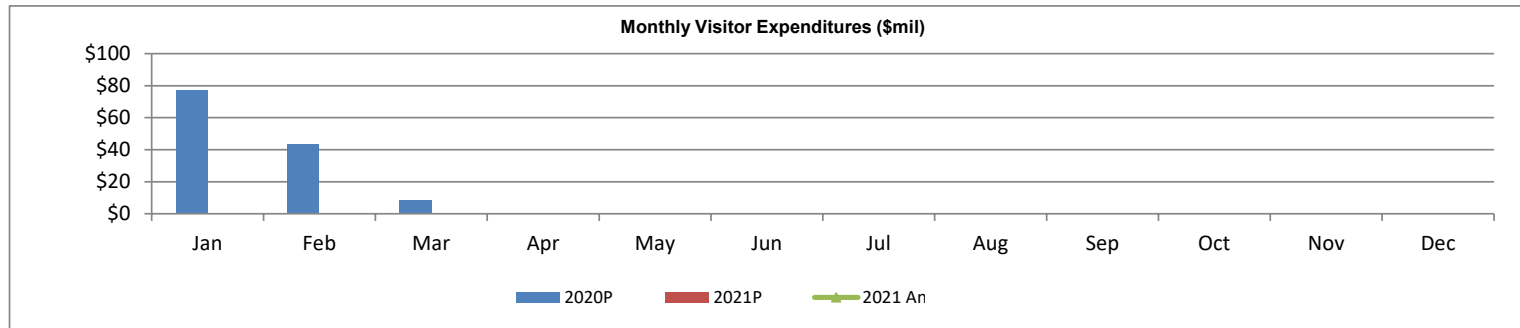
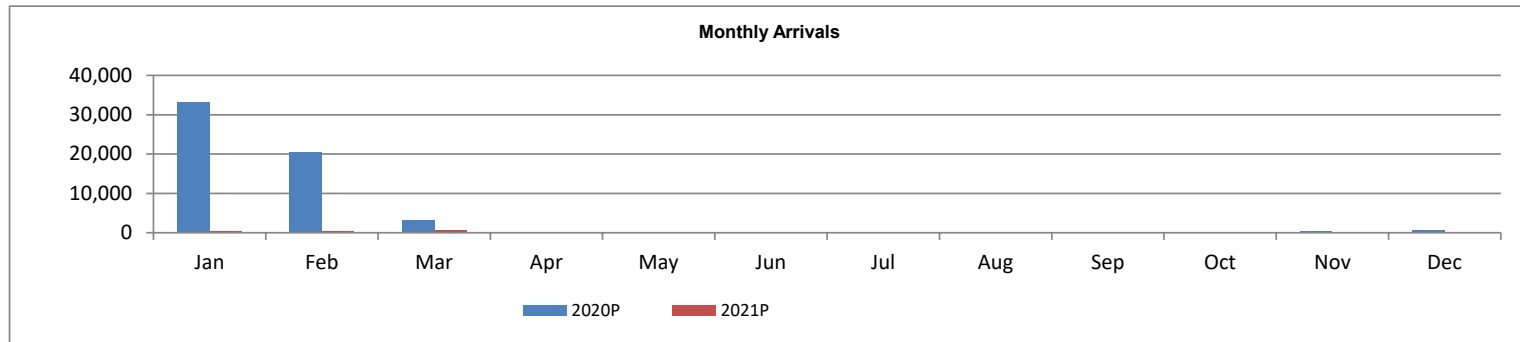
Key Performance Indicators

	YOY Rate	Mar'20 YTD	Mar'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{5/}	N/A	120.4	N/A	NA	O'ahu	-98.1%	1,074
Daily Spend (\$PPPD) ^{5/}	N/A	263.8	N/A	NA	Maui	-97.3%	216
Visitor Days	-93.7%	456,405	28,958	NA	Moloka'i	-100.0%	-
Arrivals	-97.5%	53,689	1,355	NA	Lāna'i	-96.9%	6
Daily Census	-95.8%	7,607	322	NA	Kaua'i	-97.6%	50
Airlift (scheduled seats)	-100.0%	72,897	0	245,134	Hawai'i Island	-98.1%	216

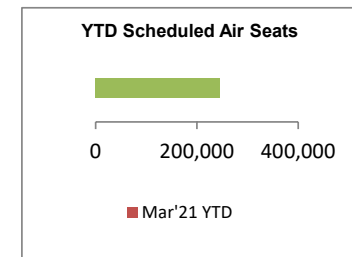
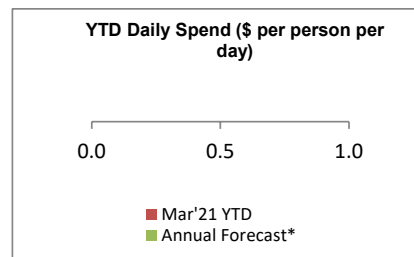
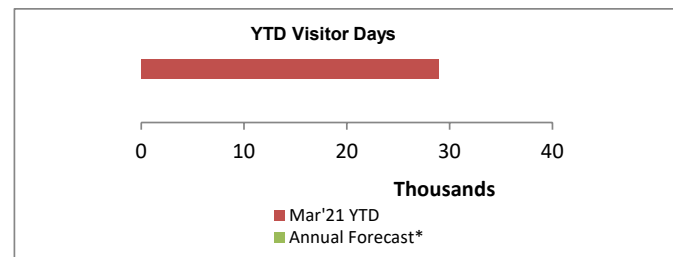
*DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.

^{5/} Year-to-date 2021 visitor spending data for January-March were not available due to limited samples

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Mar-21** Preliminary

Visitor Industry Performance Measures

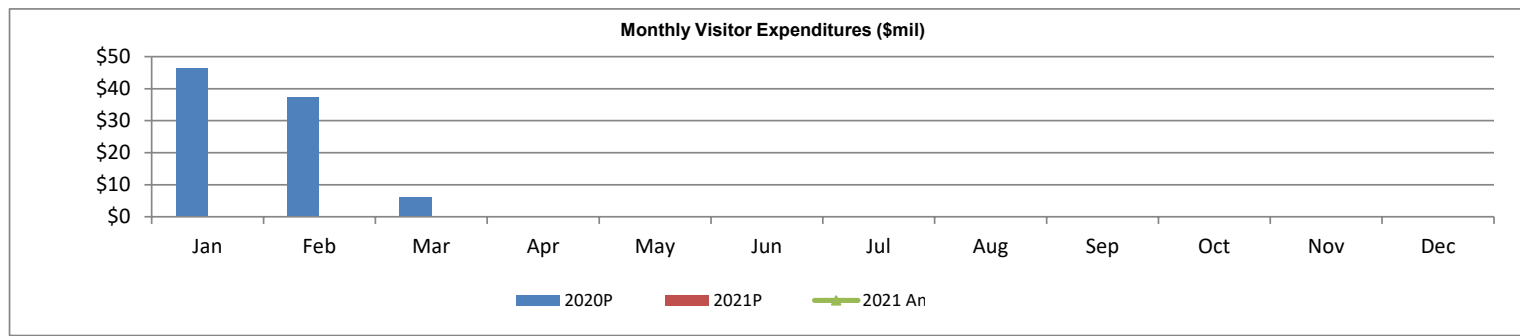
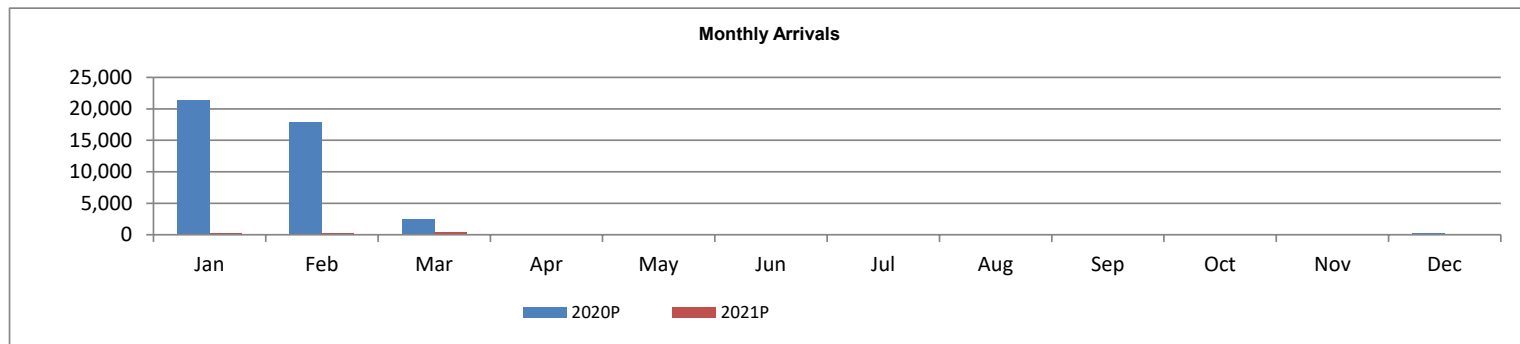
Market: **KOREA**

Key Performance Indicators							
	YOY Rate	Mar'20 YTD	Mar'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{6/}	N/A	89.8	N/A	127.0	O'ahu	-98.4%	658
Daily Spend (\$PPPD) ^{6/}	N/A	259.5	N/A	278.2	Maui	-98.2%	74
Visitor Days	-93.7%	346,142	21,880	456,698	Moloka'i	-100.0%	-
Arrivals	-98.1%	41,614	778	55,102	Lāna'i	-95.5%	4
Daily Census	-93.6%	3,804	243	1,251	Kaua'i	-97.9%	25
Airlift (scheduled seats)	-94.9%	70,957	3,614	214,534	Hawai'i Island	-98.4%	95

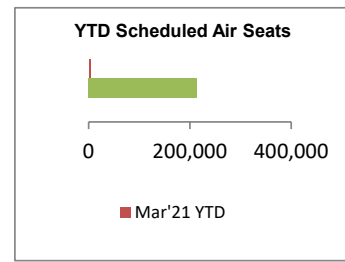
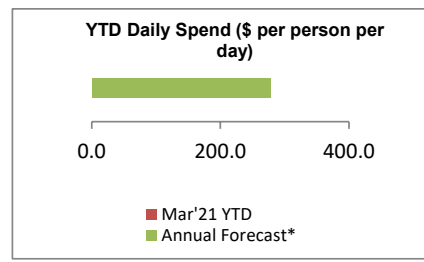
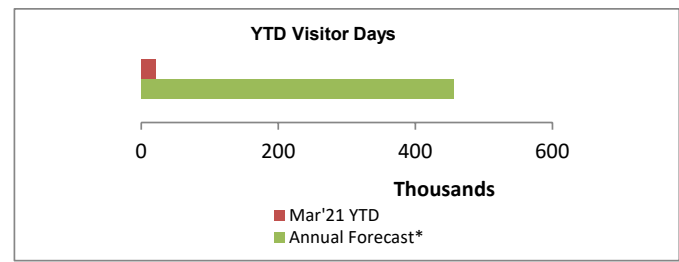
*DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.

^{6/}Year-to-date 2021 visitor spending data for January-March were not available due to limited samples

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Mar-21** Preliminary

Visitor Industry Performance Measures

Market: **LATIN AMERICA**

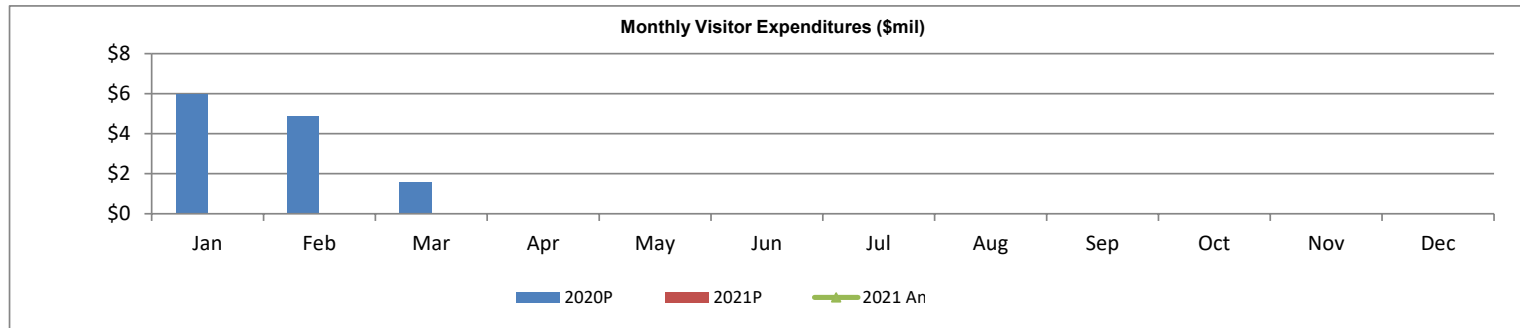
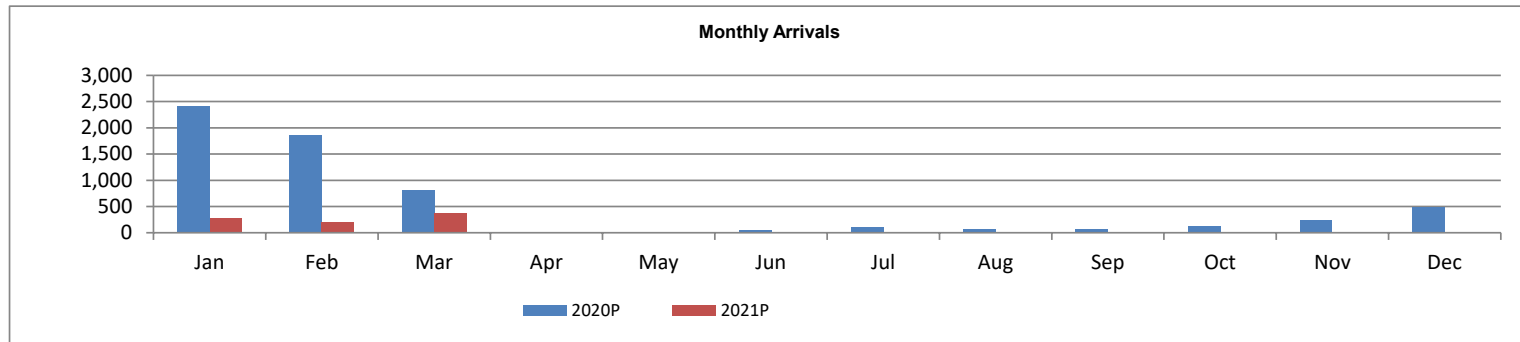
Key Performance Indicators

	YOY Rate	Mar'20 YTD	Mar'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{7/}	N/A	12.5	N/A	NA	O'ahu	-85.5%	560
Daily Spend (\$PPPD) ^{7/}	N/A	234.4	N/A	NA	Maui	-81.3%	321
Visitor Days	-75.0%	53,153	13,281	NA	Moloka'i	-62.3%	8
Arrivals	-83.4%	5,057	839	NA	Lāna'i	-59.4%	20
Daily Census	-74.7%	584	148	NA	Kaua'i	-90.8%	52
Airlift (scheduled seats)	N/A	N/A	N/A	N/A	Hawai'i Island	-79.9%	150

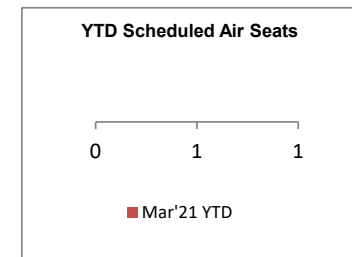
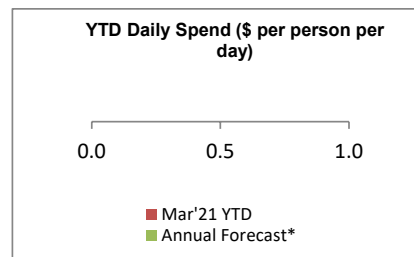
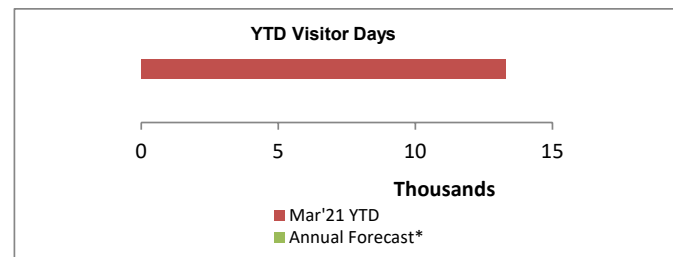
*DBEDT Annual Forecast as of Q1 2021.

^{7/} Year-to-date 2021 visitor spending data for January-March were not available due to limited samples

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures



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TELEPHONE 1 (808) 528-4050

WEBSITE www.omnitrakgroup.com

2021 Resident Sentiment Survey

Survey Sponsor	Hawai'i Tourism Authority
Survey Contractor	Omnitrak Group, Inc.
Survey Period	April 27, 2021 – May 30, 2021
Calling Hours	Monday – Friday, 10:00 a.m. – 9:00 p.m. Saturday, 9:00 a.m. – 9:00 p.m. Sunday, 10:00 a.m. – 9:00 p.m.

Purpose of the Resident Sentiment Survey

The annual Resident Sentiment Survey (RSS) is conducted for the primary purpose of understanding Hawai'i resident's attitudes and perceptions toward tourism as an industry in the state of Hawai'i.

Target Survey Participants

- Residents of the state of Hawai'i
- Adults, 18 years of age and older

Methodology

- Online
- CATI (Phone) from Omnitrak's Honolulu Calling Center

Survey Protocol

- Residential and cellular telephone numbers are randomly generated. Interviewers are not aware of the name, address or any other personal information tied to the telephone number dialed.
- Interviewers respect the wishes of residents who decline to participate.
- Qualified residents are invited to participate in the 12-minute survey and may choose to end the survey at any time.
- Responses to standard survey and demographic questions are gathered. **Questions of a personal nature are not asked and respondents may choose not to answer any questions.**
- Responses are never tied back to an individual respondent but grouped together with answers from other survey respondents and reported on an aggregate basis.

Contact

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SPRING 2021 RESIDENT SENTIMENT SURVEY [DRAFT]
FINAL APRIL/MAY 2021

CATI INTRODUCTION

Good afternoon/evening, I'm ___ from OmniTrak Group Inc., a professional research company in Honolulu. We're calling this afternoon/evening to conduct a brief survey on behalf of the Hawai'i Tourism Authority (HTA). We are interested in Hawai'i resident's attitudes toward various issues, and I'd like to ask you a few questions if I may. All of your answers will be kept confidential, of course. First...

ONLINE INTRODUCTION

Thank you for your interest in taking part in this very important survey on various issues in Hawai'i. Your opinions are important to us.

This survey is being conducted by OmniTrak Group Inc., an independent market research company based in Honolulu, Hawai'i. All of your responses will be kept strictly confidential.

Please click on the "NEXT" button to begin the survey.

QA. Are you 18 years of age or older?

- Yes..... 1 – [CONTINUE]
- No 2 – [TERMINATE]

QB. Do you consider yourself to be a “full-time” resident in the State of Hawaii?

- Yes..... 1 – [CONTINUE]
- No 2 – [TERMINATE]

Thank you for taking the time to answer our questions.

QC. What is your residential zip code?

[ACCEPTABLE RANGE: 96701 – 96850 -- TERMINATE IF NON-HAWAII ZIP CODE]
[ASK TO RE-ENTER ZIP IF NECESSARY]

QD. Do you or does anyone in your household work in/for a [INSERT]?

[ASK ALL BEFORE TERMINATING]

- Research company.....1 – [CONTINUE]
- Government agency2 – [CONTINUE]
- Media/Advertising/PR3 – [CONTINUE]
- Other4 – [CONTINUE]

To begin....

Q1. Using a 10-point scale where 10 means **Extremely Favorable** and 1 means **Not Favorable At All**, please give me your opinion of Tourism as an industry in Hawai'i.

Not Favorable At All										Extremely Favorable	DK	REF
1	2	3	4	5	6	7	8	9	10	98	99	

Q2. Using a 10-point scale, this time where 10 means **Extremely Positive** and 1 means **Extremely Negative** how would you rate the overall impact tourism has on...? **[INSERT]** If tourism has no impact, please just tell me.

Extremely Negative										Extremely Positive		DK	REF
1	2	3	4	5	6	7	8	9	10			98	99
The state as a whole										<input type="checkbox"/>	<input type="checkbox"/>		
You and your family										<input type="checkbox"/>	<input type="checkbox"/>		

Q3. In 2019, visitors spent nearly \$18 billion in Hawaii, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure.

Do you think tourism is worth the issues associated with the industry?

Yes..... 1

No 2

Q4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being **Completely Agree** and 1 meaning **Do Not Agree At All**. You can choose any number between 1 and 10.

First, how much do you agree or disagree that ... **[INSERT]**

Do Not Agree At All										Completely Agree		DK	REF
1	2	3	4	5	6	7	8	9	10			98	99
ROTATE ATTRIBUTES										Rating			
Tourism creates many well-paying jobs for residents										<input type="checkbox"/>	<input type="checkbox"/>		
Tourism creates shopping, restaurants and entertainment opportunities for residents										<input type="checkbox"/>	<input type="checkbox"/>		
Tourism creates jobs that have opportunities for advancement										<input type="checkbox"/>	<input type="checkbox"/>		
Tourism helps to preserves Native Hawaiian culture and language										<input type="checkbox"/>	<input type="checkbox"/>		
Tourism helps sustain Hawai'i's natural resources, parks and cultural sites										<input type="checkbox"/>	<input type="checkbox"/>		
Tourism is an industry that enhances residents' quality of life										<input type="checkbox"/>	<input type="checkbox"/>		
Tourism sponsors festivals, activities & sports events for residents & visitors										<input type="checkbox"/>	<input type="checkbox"/>		
Tourism supports other industries like agriculture										<input type="checkbox"/>	<input type="checkbox"/>		
Tourism supports our local businesses like retail, dining etc.										<input type="checkbox"/>	<input type="checkbox"/>		
Tourism has brought more benefits than problems										<input type="checkbox"/>	<input type="checkbox"/>		
This island is being run for tourists at the expense of local people										<input type="checkbox"/>	<input type="checkbox"/>		
My island's economy is too dependent on tourism										<input type="checkbox"/>	<input type="checkbox"/>		
Tourism presents Native Hawaiian language and culture in an authentic manner										<input type="checkbox"/>	<input type="checkbox"/>		
Tourism should be actively encouraged on my island										<input type="checkbox"/>	<input type="checkbox"/>		
I feel like I have a voice in my island's tourism development decisions.										<input type="checkbox"/>	<input type="checkbox"/>		
Tourism in Hawai'i reminds me that we have a unique culture to share with visitors.										<input type="checkbox"/>	<input type="checkbox"/>		
I feel like more effort is being made to balance economic benefits of tourism and quality of life for residents.										<input type="checkbox"/>	<input type="checkbox"/>		
I feel like tourism is being better managed on my island.										<input type="checkbox"/>	<input type="checkbox"/>		

[IF RATED TOURISM 1-5 IN Q4_10, ASK]

Q5. You indicated earlier that tourism has not resulted in more benefits than problems. In your opinion, what problems do you think tourism has created in Hawai'i? Anything else?
[DO NOT READ LIST. MULTIPLE MENTIONS ALLOWED. PROBE UNTIL EXHAUSTED.]

- Traffic problems1
- Higher prices/higher cost of living.....2
- Overcrowding.....3
- Damage to the environment4
- Increased crime5
- Health concerns, viruses, potential for epidemics6
- Too dependent on tourism.....21
- No respect for culture/tradition/aina22
- "Locals" don't benefit from tourism money23
- Other (*Specify*).....50
- DON'T KNOW98**
- REFUSED.....99**

[IF RATED 6-10 IN Q1, ASK]

Q6. You indicated earlier that you were favorable toward tourism. Is there anything that residents like yourself can do to contribute to or support the tourism industry? **[PROBE UNTIL EXHAUSTED]** Anything else?
[97=NONE / 98=DON'T KNOW]

Q7. Legally, the state of Hawaii is not able to limit travel to the islands. Using a 10-point scale where 10 means Extremely Important and 1 means Not Important at All, how important is it that the state **[INSERT]** to help better manage tourism?

Not Important At All										Most Important		DK	REF
1	2	3	4	5	6	7	8	9	10	98	99		
ROTATE ATTRIBUTES												Rating	
Eliminate illegal vacation rentals on my island												<input type="checkbox"/>	<input type="checkbox"/>
Stop approval of additional legal vacation rentals on my island												<input type="checkbox"/>	<input type="checkbox"/>
Do not allow building of additional hotel/condo/timeshare units on my island												<input type="checkbox"/>	<input type="checkbox"/>
Charge visitor access fees to state parks and trails												<input type="checkbox"/>	<input type="checkbox"/>
Designate resident-only days of the week at some state parks, beaches and trails												<input type="checkbox"/>	<input type="checkbox"/>
Educate visitors and residents to malama the islands and each other												<input type="checkbox"/>	<input type="checkbox"/>
Encourage visitors to volunteer and give back during their visits to Hawaii												<input type="checkbox"/>	<input type="checkbox"/>

Q8. Prior to doing this survey, were you aware of the existence of the Hawai'i Tourism Authority [HTA]?

- Yes..... 1 – **[CONTINUE]**
- No..... 2 – **[SKIP TO D1]**

Q9. Using a 10-point scale where 10 means **Extremely Favorable** and 1 means **Not Favorable At All**, please give me your opinion of the Hawai'i Tourism Authority (HTA) overall

Not Favorable At All										Extremely Favorable		DK	REF
1	2	3	4	5	6	7	8	9	10	98	99		

Q9a. I would now like to read you a list of tourism-related activities. Before this interview, were you aware that the Hawai'i Tourism Authority (HTA) is responsible for ... **[READ LIST]**

[FOR EACH AWARE IN Q9A, ASK]

Q9b. In your opinion, how well has the Hawai'i Tourism Authority (HTA) carried out these responsibilities.

Using a scale of 1 to 10 where 10 means you think the Hawai'i Tourism Authority (HTA) is doing an **Excellent** job and 1 means you think the HTA is doing a **Poor** job, how would you rate the job the Hawai'i Tourism Authority (HTA) is doing in ...**[READ LIST]**

Poor									Excellent	DK	REF
1	2	3	4	5	6	7	8	9	10	98	99
									Q9a.	Q9b.	
ROTATE ATTRIBUTES									Aware	Job Performance	
Marketing and promoting travel to Hawai'i									1=Yes 2=No	<input type="checkbox"/>	<input type="checkbox"/>
Promoting a vision for sustainable tourism that balances the state's economic well-being and resident quality of life.									1=Yes 2=No	<input type="checkbox"/>	<input type="checkbox"/>
Leading the visitor industry in Hawai'i									1=Yes 2=No	<input type="checkbox"/>	<input type="checkbox"/>
Proactively educating the visitor industry, visitors and residents to malama the islands and its traditions									1=Yes 2=No	<input type="checkbox"/>	<input type="checkbox"/>
Enhancing the competitiveness Upholding Hawai'i's place as a premier global travel destination									1=Yes 2=No	<input type="checkbox"/>	<input type="checkbox"/>
Communicating with and listening to, Hawai'i residents concerning tourism-related issues and concerns									1=Yes 2=No	<input type="checkbox"/>	<input type="checkbox"/>
Supporting and perpetuating Native Hawaiian culture, arts and places									1=Yes 2=No	<input type="checkbox"/>	<input type="checkbox"/>
Balancing the needs of residents with expectations of visitors and protection of Hawai'i's natural resources									1=Yes 2=No	<input type="checkbox"/>	<input type="checkbox"/>

Now, I have a few last questions for classification purposes only. .

D1. What was your age on your last birthday?

D2. What is your ethnic background? **[IF MORE THAN ONE:]** With which do you identify the most?

- Caucasian.....1
- Chinese.....2
- Filipino3
- Native Hawaiian.....4
- Japanese5
- African American6
- Mixed (not Hawaiian).....7
- Other Asian.....8
- Hispanic.....9
- Other Polynesian10
- Samoan11
- Korean12
- Portuguese13
- Native American14
- Other (*Specify*).....50
- [REFUSED]99**

D3. Including yourself and any children, how many people, live in your household?

D4. What is your marital status?

- Single, never married1
- Married.....2
- Divorced, separated, widowed3
- Domestic Partnership4
- Other (*specify*)_____5
- [REFUSED]**9

D5. What is the last grade in school you completed?

- Less Than High School1
- High School Graduate2
- Business/Trade school3
- Some College4
- College Graduate/Post Graduate5
- [DON'T KNOW]**.....8
- [REFUSED]**9

D6. Are you currently employed?

- Yes..... 1 – **[CONTINUE]**
- No 2 – **[GO TO D7b]**

Let's define the "visitor industry" as any business depending mostly on tourists or depending on other businesses working with tourists?

D7a. Is your current job part of the visitor industry?

- Yes..... 1 – **[GO TO D7c]**
- No 2 – **[CONTINUE]**

D7b. Have you ever worked in the visitor industry?

- Yes..... 1 – **[CONTINUE]**
- No 2 – **[CONTINUE]**

D7c. Does anyone else in this household currently work in the visitor industry?

- Yes..... 1 – **[GO TO D8]**
- No 2 – **[CONTINUE]**

D7d. Has anyone else in this household ever worked in the visitor industry?

- Yes..... 1
- No 2

D8. What is your occupation? What kind of main job do you do? **[DO NOT READ LIST]**

- Chairman/President/CEO/Executive 1
- Management.....2
- Partner/Owner/Proprietor3
- Professional4
- Technical5
- Sales6
- Service for hotel/restaurant, etc.7
- Administrative/Clerical8
- Not Employed9
- Retired10
- Blue Collar (laborer/farmer/construction, etc.).....11
- White collar12
- Self-employed.....13
- Homemaker/Caregiver14
- Military15
- Other (*Specify*).....50
- [DON'T KNOW].....98**
- [REFUSED]99**

D9. Which of the following broad categories includes your household's total annual income from all sources before taxes for 2019? **[READ LIST]**

- Less than \$25,000 1
- \$25,000 but less than \$35,0002
- \$35,000 but less than \$50,0003
- \$50,000 but less than \$75,0004
- \$75,000 but less than \$100,0005
- \$100,000 but less than \$150,0006
- \$150,000 but less than \$200,0007
- More than \$200,0008
- [DON'T KNOW].....98**
- [REFUSED]99**

D10. How many years have you lived in Hawai'i?

- Less than one year 1
- One year but less than 5 years.....2
- Five years but less than 10 years.....3
- Ten years but less than 20 years4
- Twenty years or more5
- Born and raised in Hawai'i.....6
- [DON'T KNOW].....8**
- [REFUSED]9**

D11. In 2020, how many trips whether for pleasure or business have you taken **[INSERT]**
[0=NONE / 98=DON'T KNOW / 99=REFUSED]

- To the Neighbor Islands
- To the U.S. Mainland.....
- To any International Destination.....

D12a. Are you registered to vote in Hawai'i?

- Yes..... 1 – **[GO TO D12b]**
- No 2 – **[CONTINUE]**

D12b. Did you vote in the last election?

Yes..... 1 – [CONTINUE]
No 2 – [CONTINUE]

D13 [RECORD, DO NOT ASK] Gender of respondent?

Male 1
Female..... 2

These are all the questions I have for you. May I have your first name only, please, in case my supervisor needs to verify that I conducted this interview or if there is any clarification needed?

Thank you for taking the time to answer my questions. Your opinions are very important to us. Have a nice day.

Month
February 2021

Visitor Arrivals

Total Visitors & % change YOY, February 2021

235.3K ▼ -71.1%

Expenditure by Visitors

Total Expenditure & % change YOY, February 2021

\$385.3M ▼ -73.5%

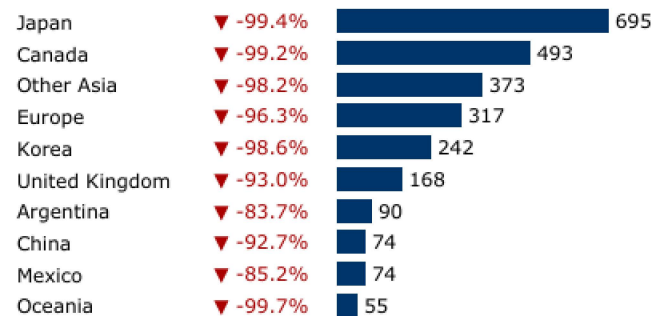
Avg. Length of Stay

All visitors, February 2021

10.8 Days

Visitors from International Markets

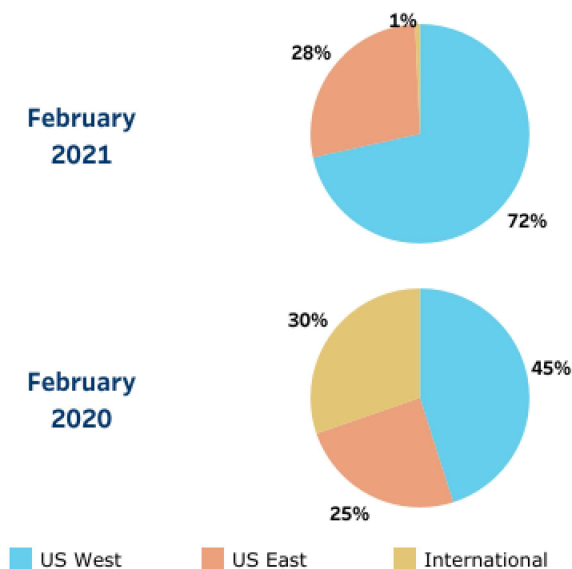
% change YOY & no of visitors



Source: HTA

Origin Market Share

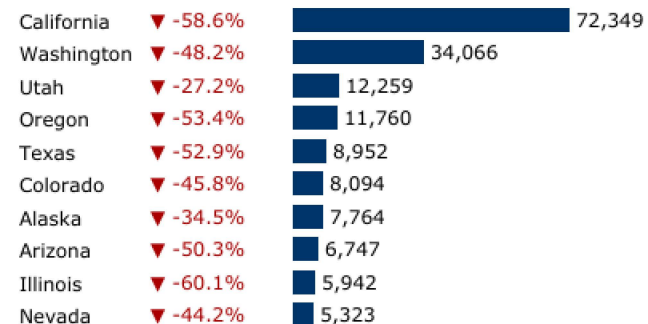
% share of visitor for February 2021



Source: HTA

Top 10 Domestic Markets

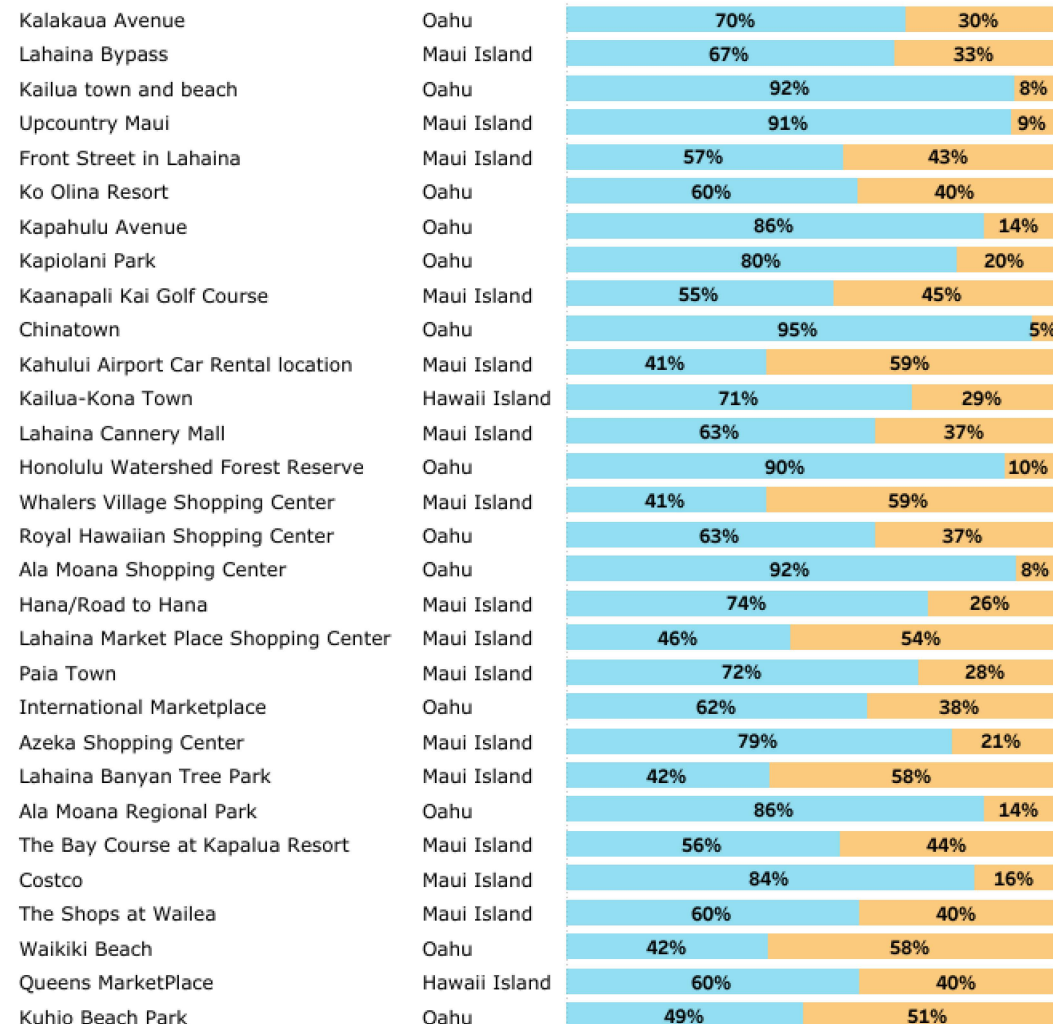
% change YOY & no of visitors



Source: HTA

Top POIs Visited, February 2021

Ranked by number of visits by visitors. % share of visits by residents & visitors



Source: UM

* Residents refer to residents of the State of Hawaii, all islands

State of Hawaii Lodging Summary

February 2021

Month: February 2021
Island: State of Hawaii

February 2021 & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	35.8%	▼ -48.6%	1,942.9K	▼ -13.5%	696.2K	▼ -63.3%
Hotel	30.5%	▼ -54.0%	1,408.0K	▼ -7.3%	429.7K	▼ -66.5%
Short Term Rentals	49.8%	▼ -34.3%	534.9K	▼ -26.6%	266.6K	▼ -56.5%
Timeshare						

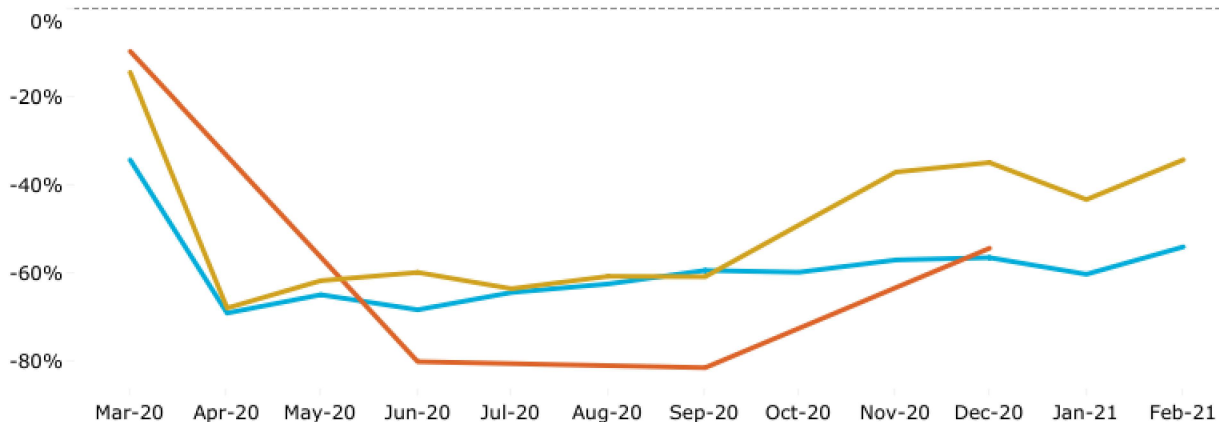
February 2021 YTD Calendar Year & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	31.7%	▼ -52.0%	4,162.5K	▼ -11.9%	1,320.4K	▼ -66.6%
Hotel	26.7%	▼ -57.3%	2,953.7K	▼ -7.7%	789.3K	▼ -70.6%
Short Term Rentals	43.9%	▼ -39.3%	1,208.8K	▼ -20.8%	531.0K	▼ -58.2%
Timeshare						

*Timeshare information is only available after the end of each quarter
OCC YOY change is percentage point change
Source: STR, Transparent & HTA

Occupancy Change

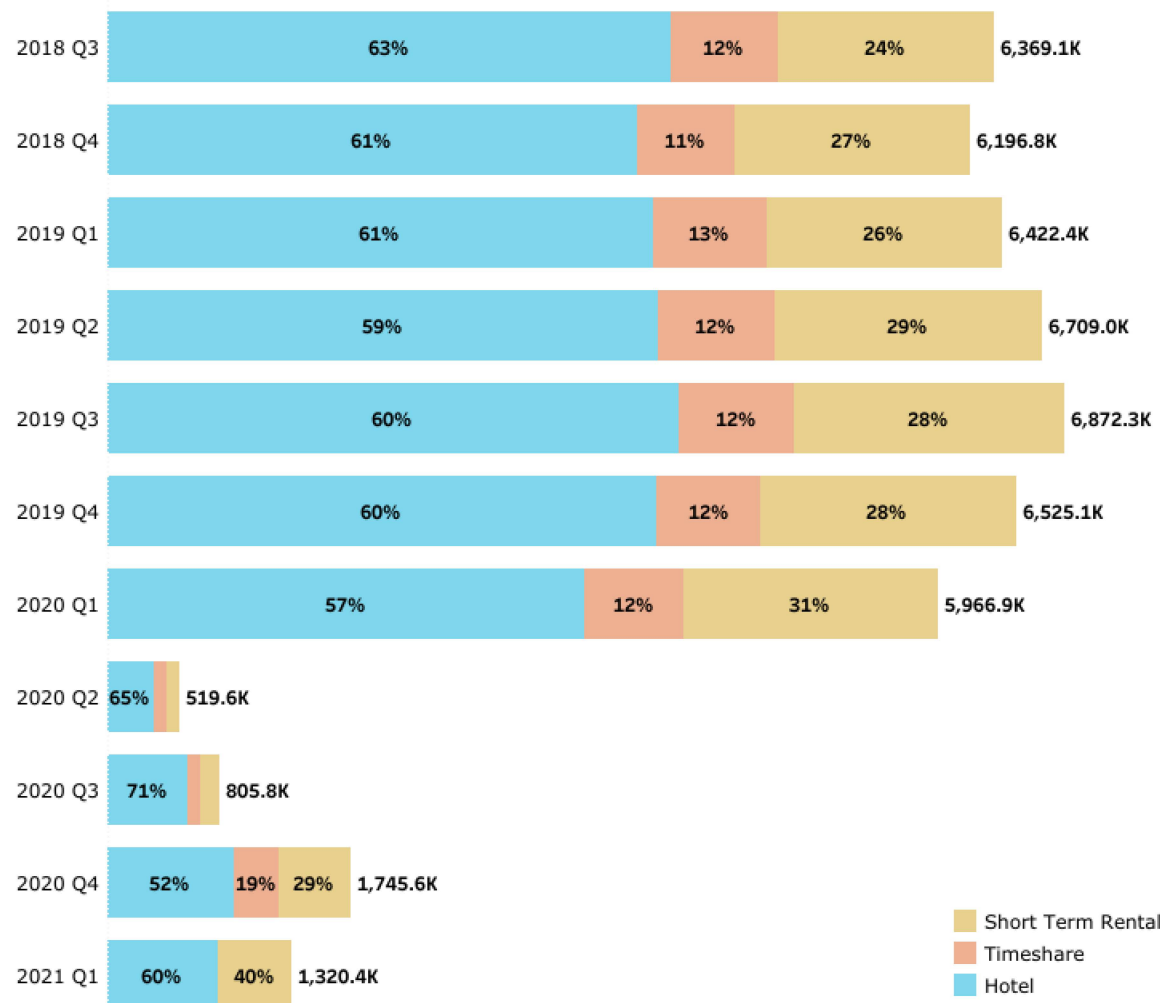
% point change, compared to same month in previous year



Source: STR, Transparent & HTA

Room Demand and Contribution

February 2021, State of Hawaii



*2021 Q1 does not include timeshare data. Timeshare information is only available after the end of each quarter
Source: STR, Transparent & HTA

Month
February 2021

Island
Oahu

Visitor Arrivals

Total Visitors & % change YOY, February 2021

105.4K ▼ -77.7%

Expenditure by Visitors

Total Expenditure & % change YOY, February 2021

\$133.3M ▼ -77.4%

Avg. Length of Stay

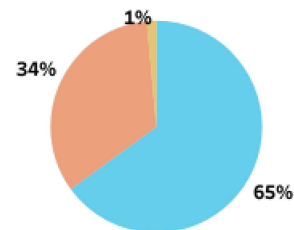
All visitors, February 2021

9.5 Days

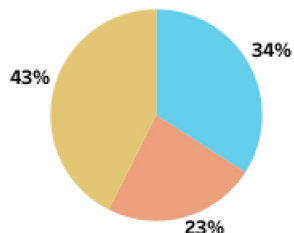
Origin Market Share

% share of visitor for February 2021

February 2021



February 2020

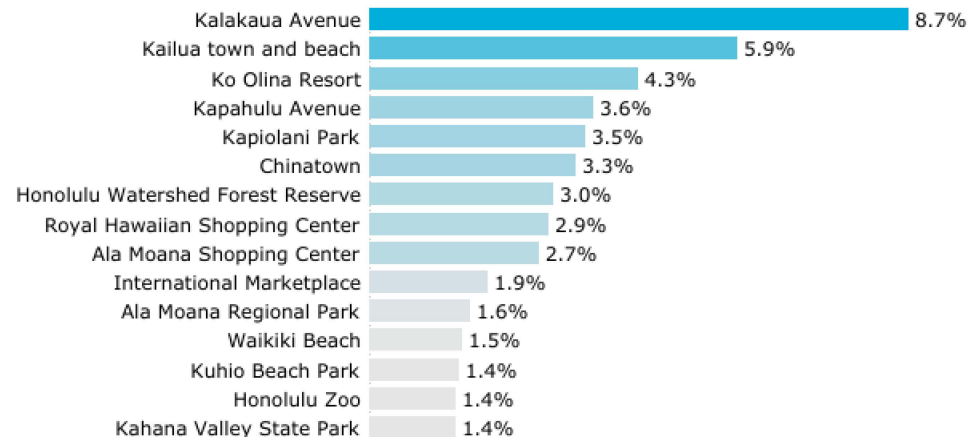


■ US West ■ US East ■ International

Source: HTA

Top POIs Visited by Visitors

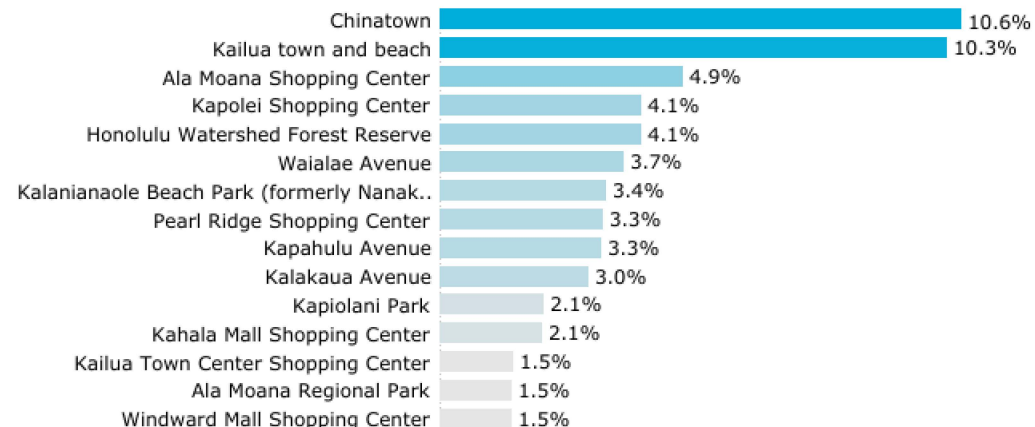
% share of visits, February 2021



Source: UM

Top POIs Visited by Residents

% share of visits, February 2021

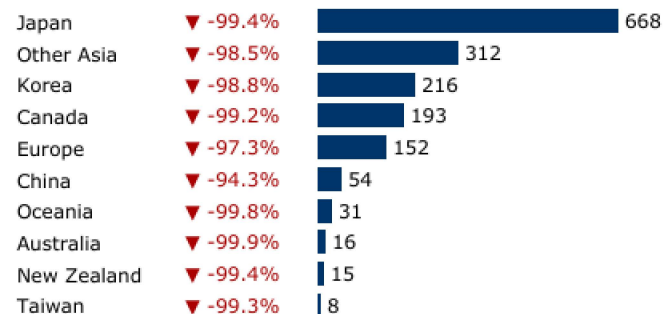


Source: UM

* Residents refer to residents of the State of Hawaii, all islands

Visitors from International Markets

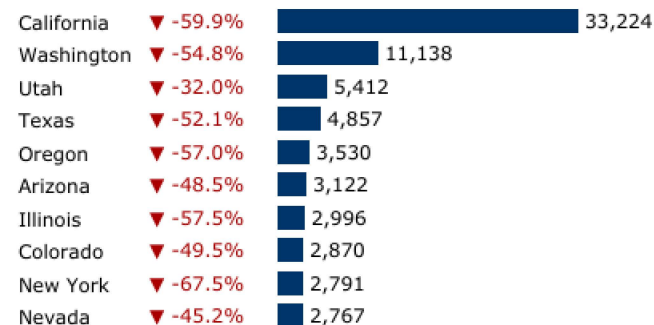
% change YOY & no of visitors



Source: HTA

Top 10 Domestic Markets

% change YOY & no of visitors



Source: HTA

Oahu Visitation Insights for Visitors

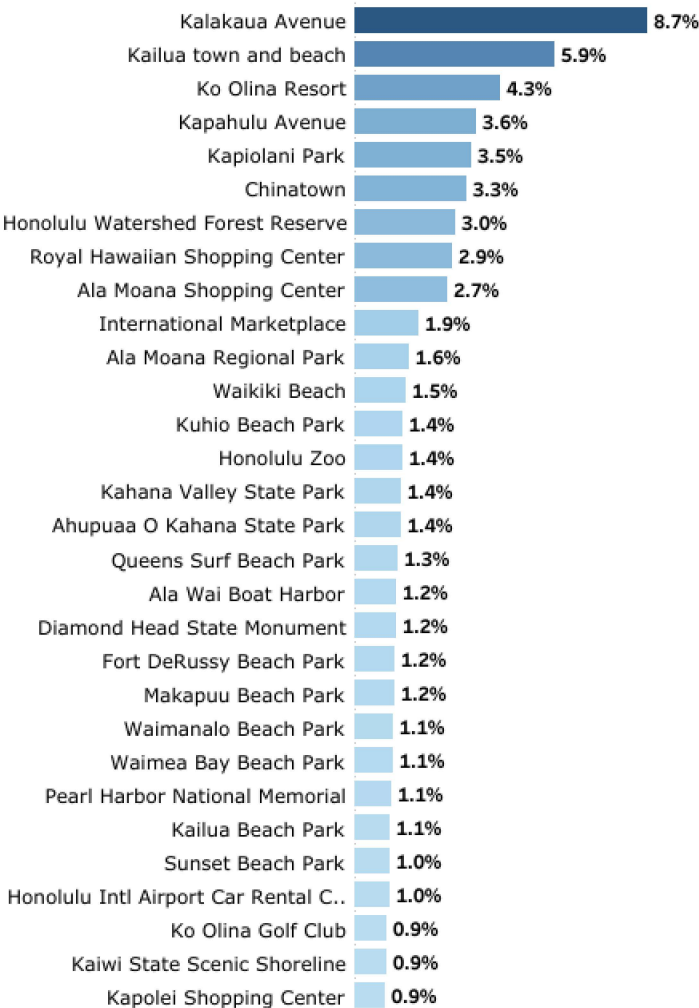
Date Range: 01-Feb-21 to 28-Feb-21

Island: Oahu
From Date: 01-Feb-21
To Date: 28-Feb-21

Oahu Top POIs Visited by Visitors

Date Range: 01-Feb-21 to 28-Feb-21

% share of visits

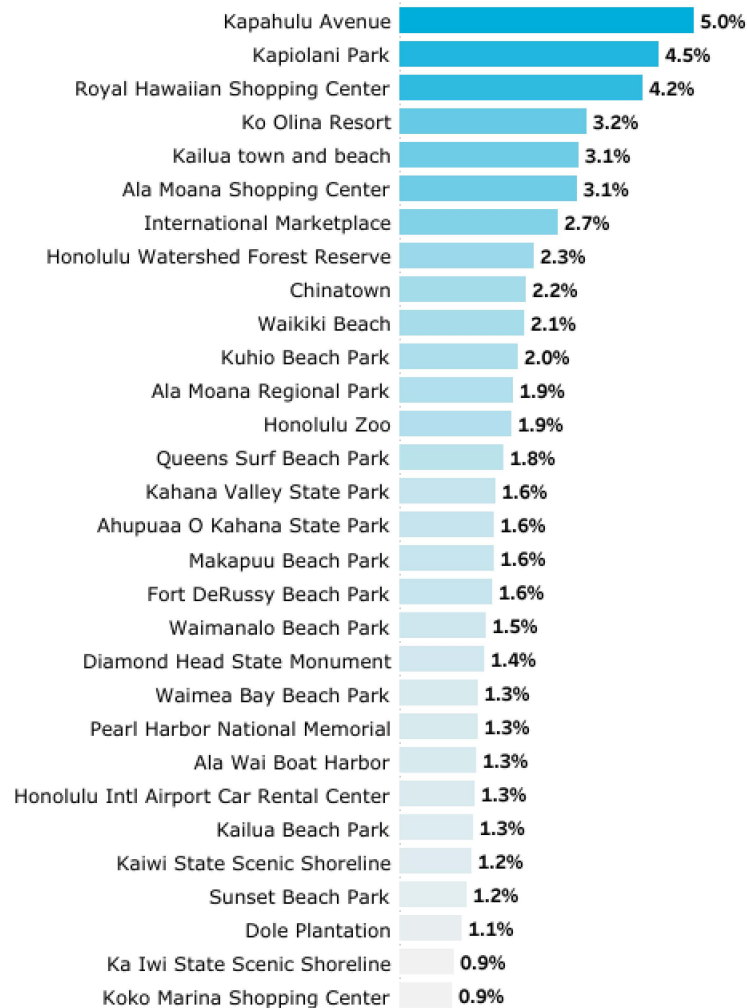


Source: UM

Cross Visitation on Oahu

POI: Kalakaua Avenue

% share of visits

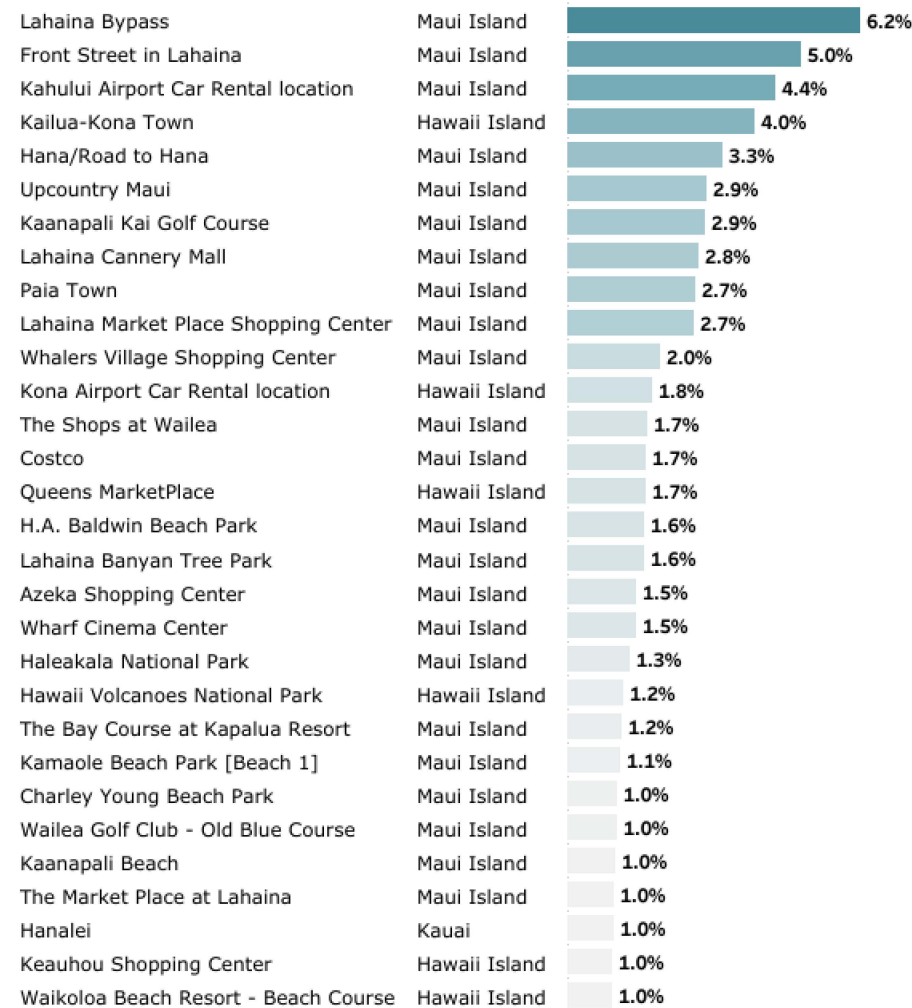


Source: UM

Cross Visitation on other Islands

POI: Kalakaua Avenue

% share of visits



Source: UM

Oahu Visitation Insights for Residents

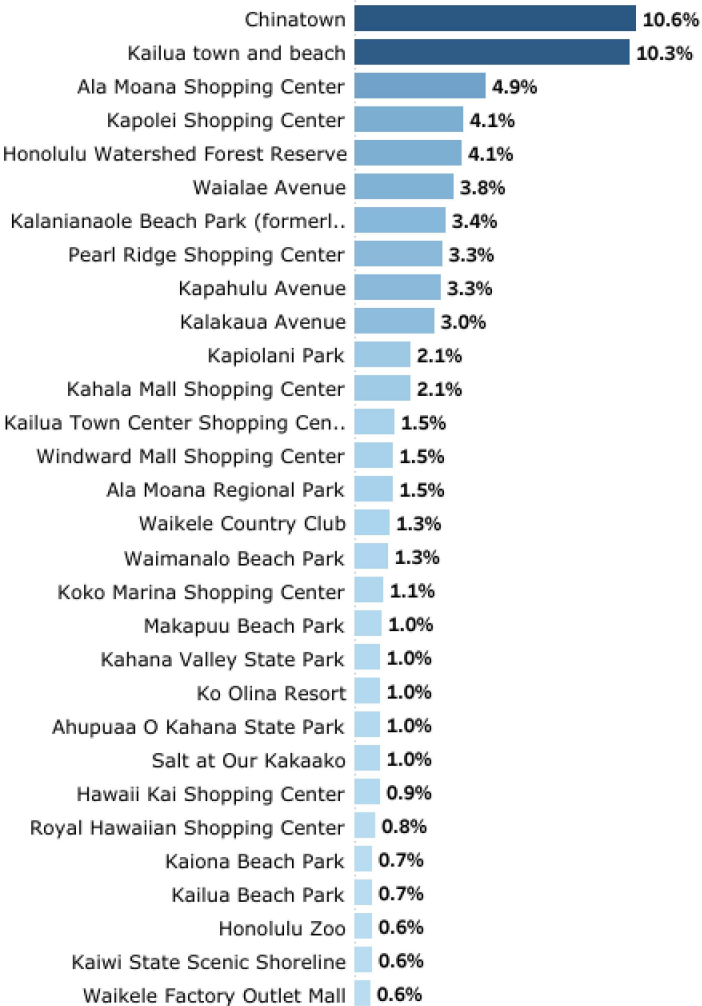
Date Range: 01-Feb-21 to 28-Feb-21

Island: Oahu
Residence County: Honolulu, HI
From Date: 01-Feb-21
To Date: 28-Feb-21

Oahu Top POIs Visited by Residents

Date Range: 01-Feb-21 to 28-Feb-21

% share of visits

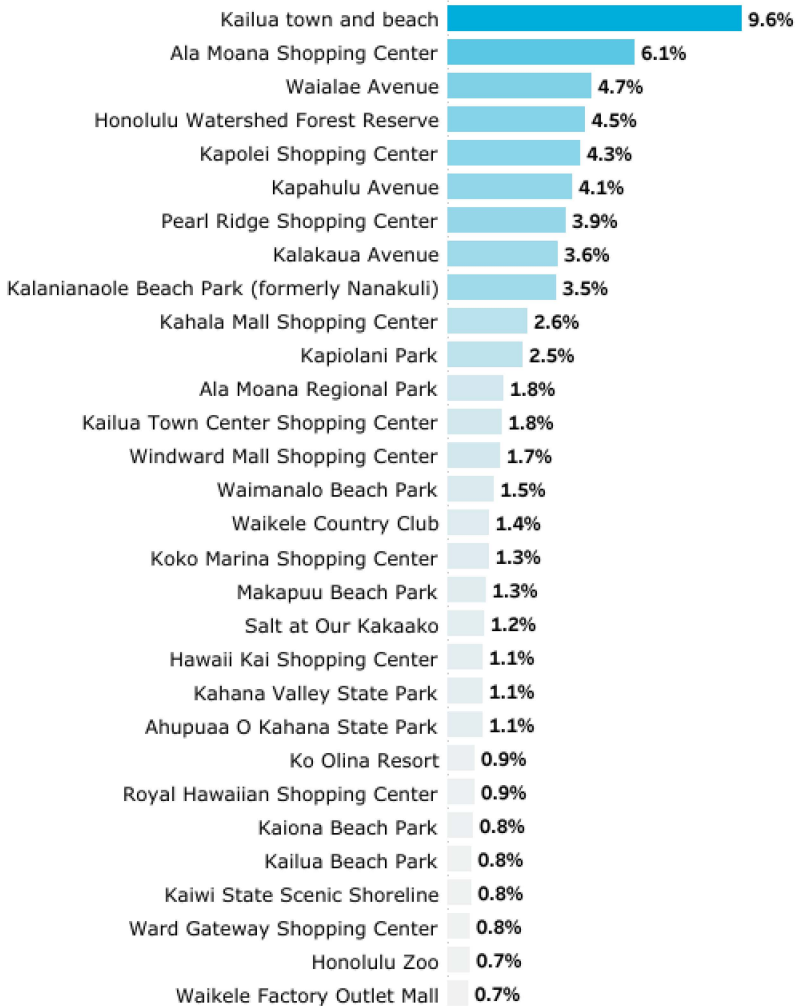


Source: UM

Cross Visitation on Oahu

POI: Chinatown

% share of visits

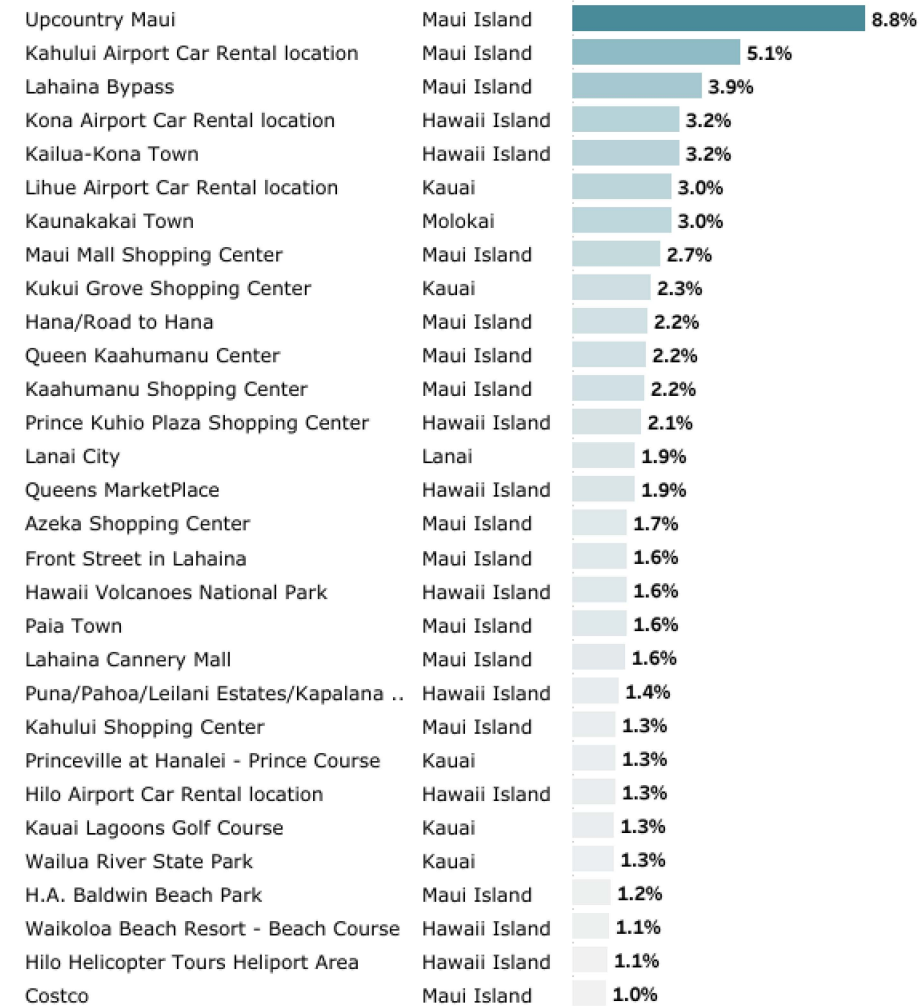


Source: UM

Cross Visitation on other Islands

POI: Chinatown

% share of visits



Source: UM

Oahu Lodging Summary

February 2021

Month
February 2021

Island
Oahu

February 2021 & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	32.9%	▼ -52.1%	898.6K	▼ -16.1%	296.0K	▼ -67.5%
Hotel	29.3%	▼ -56.7%	775.6K	▼ -9.5%	227.3K	▼ -69.2%
Short Term Rentals	55.9%	▼ -25.2%	123.1K	▼ -42.4%	68.7K	▼ -60.3%
Timeshare						

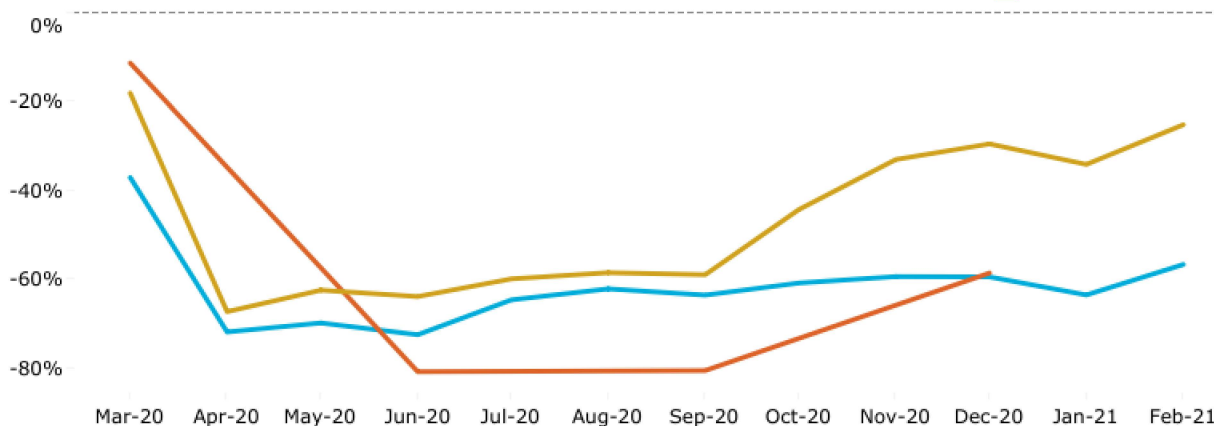
February 2021 YTD Calendar Year & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	29.9%	▼ -55.6%	1,896.6K	▼ -15.5%	567.1K	▼ -70.5%
Hotel	26.3%	▼ -60.3%	1,620.5K	▼ -10.3%	426.7K	▼ -72.7%
Short Term Rentals	50.8%	▼ -30.2%	276.1K	▼ -37.0%	140.4K	▼ -60.5%
Timeshare						

*Timeshare information is only available after the end of each quarter
OCC YOY change is percentage point change
Source: STR, Transparent & HTA

Occupancy Change

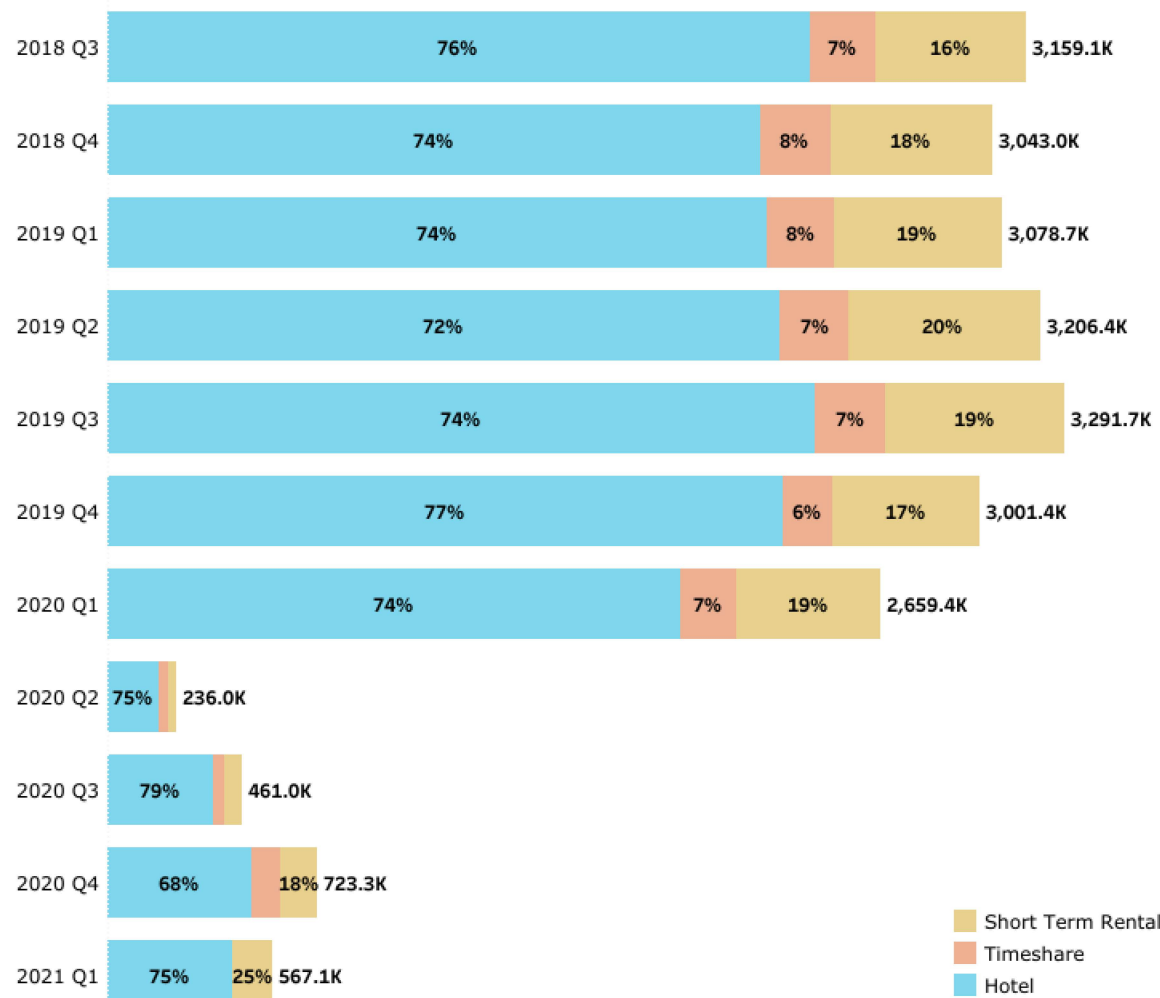
% point change, compared to same month in previous year



Source: STR, Transparent & HTA

Room Demand and Contribution

February 2021, Oahu



*2021 Q1 does not include timeshare data. Timeshare information is only available after the end of each quarter
Source: STR, Transparent & HTA

Month
February 2021

Island
Maui Island

Visitor Arrivals

Total Visitors & % change YOY, February 2021

92.6K ▼ -60.6%

Expenditure by Visitors

Total Expenditure & % change YOY, February 2021

\$166.2M ▼ -63.9%

Avg. Length of Stay

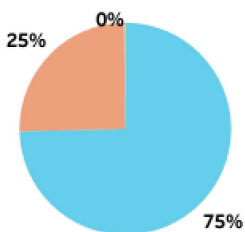
All visitors, February 2021

9.7 Days

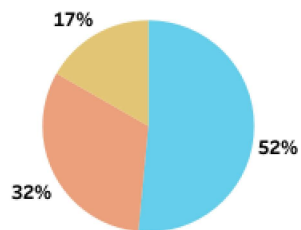
Origin Market Share

% share of visitor for February 2021

February 2021



February 2020

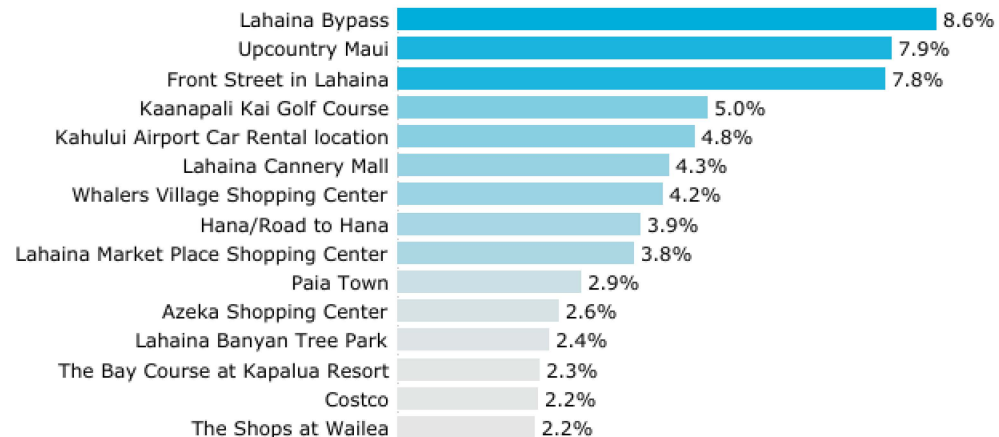


■ US West ■ US East ■ International

Source: HTA

Top POIs Visited by Visitors

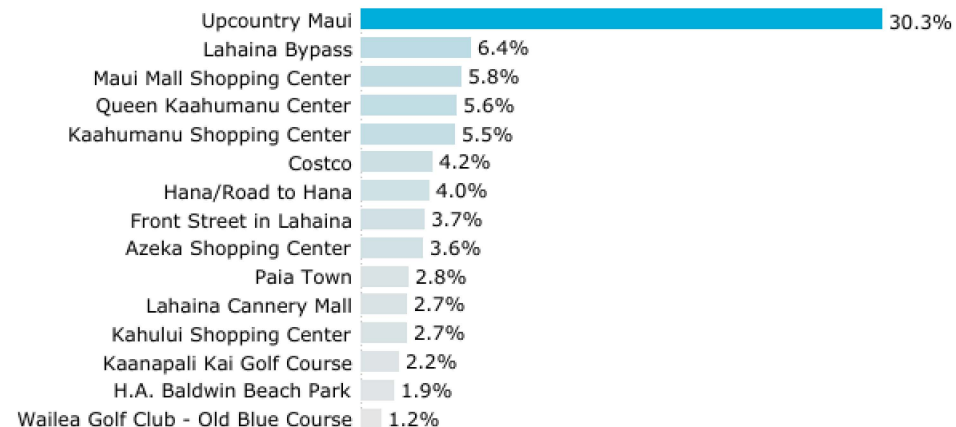
% share of visits, February 2021



Source: UM

Top POIs Visited by Residents

% share of visits, February 2021

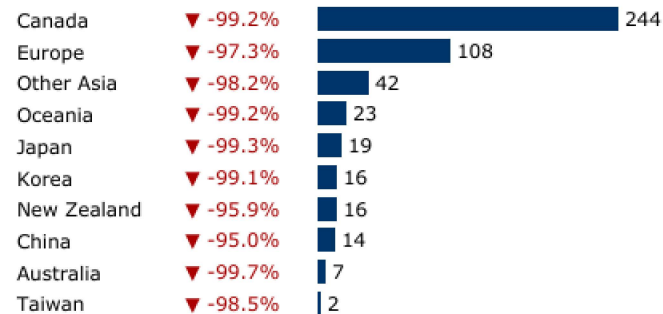


Source: UM

* Residents refer to residents of the State of Hawaii, all islands

Visitors from International Markets

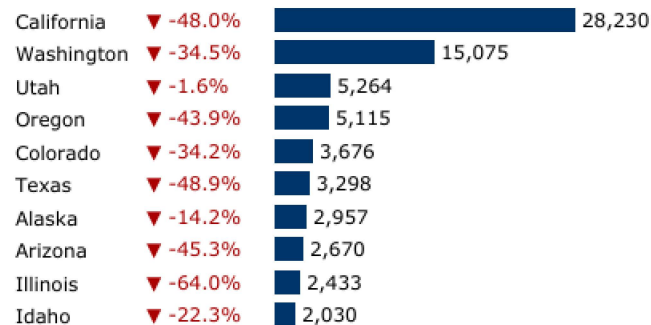
% change YOY & no of visitors



Source: HTA

Top 10 Domestic Markets

% change YOY & no of visitors



Source: HTA

Maui Island Visitation Insights for Visitors

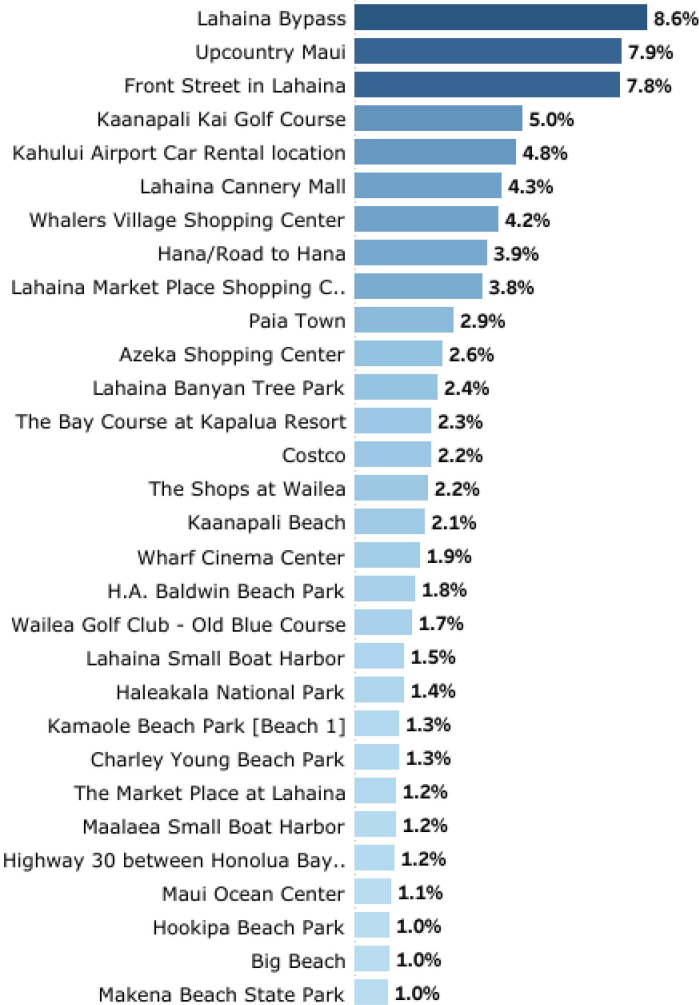
Date Range: 01-Feb-21 to 28-Feb-21

Island: Maui Island
 From Date: 01-Feb-21
 To Date: 28-Feb-21

Maui Island Top POIs Visited by Visitors

Date Range: 01-Feb-21 to 28-Feb-21

% share of visits

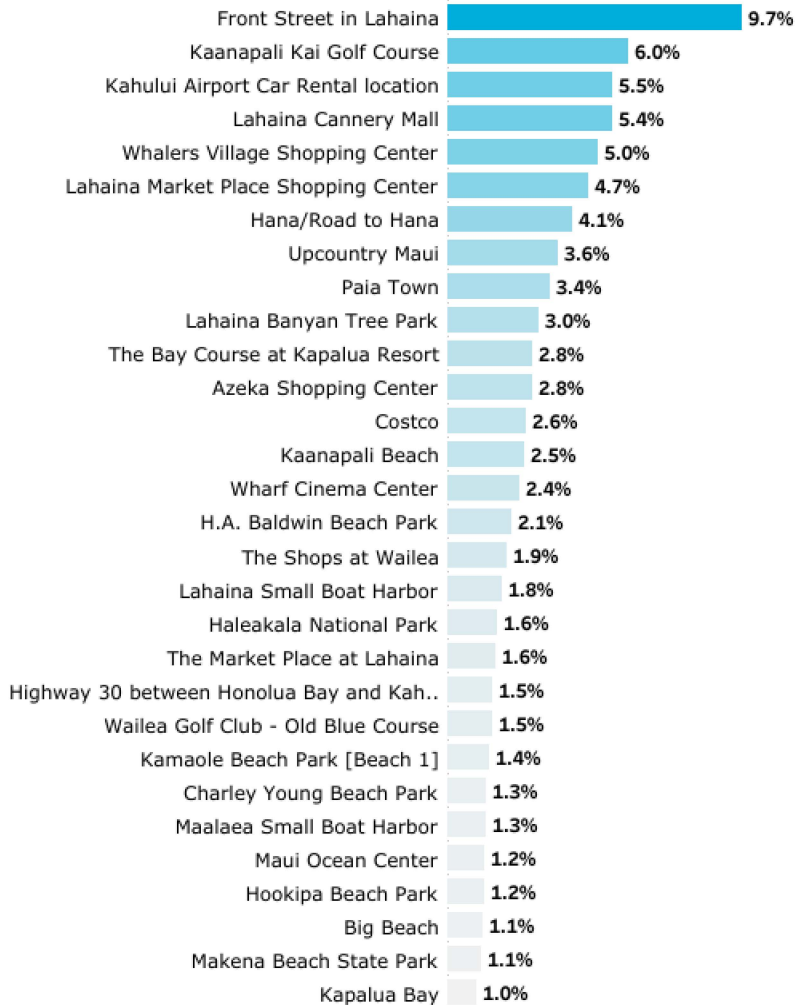


Source: UM

Cross Visitation on Maui Island

POI: Lahaina Bypass

% share of visits

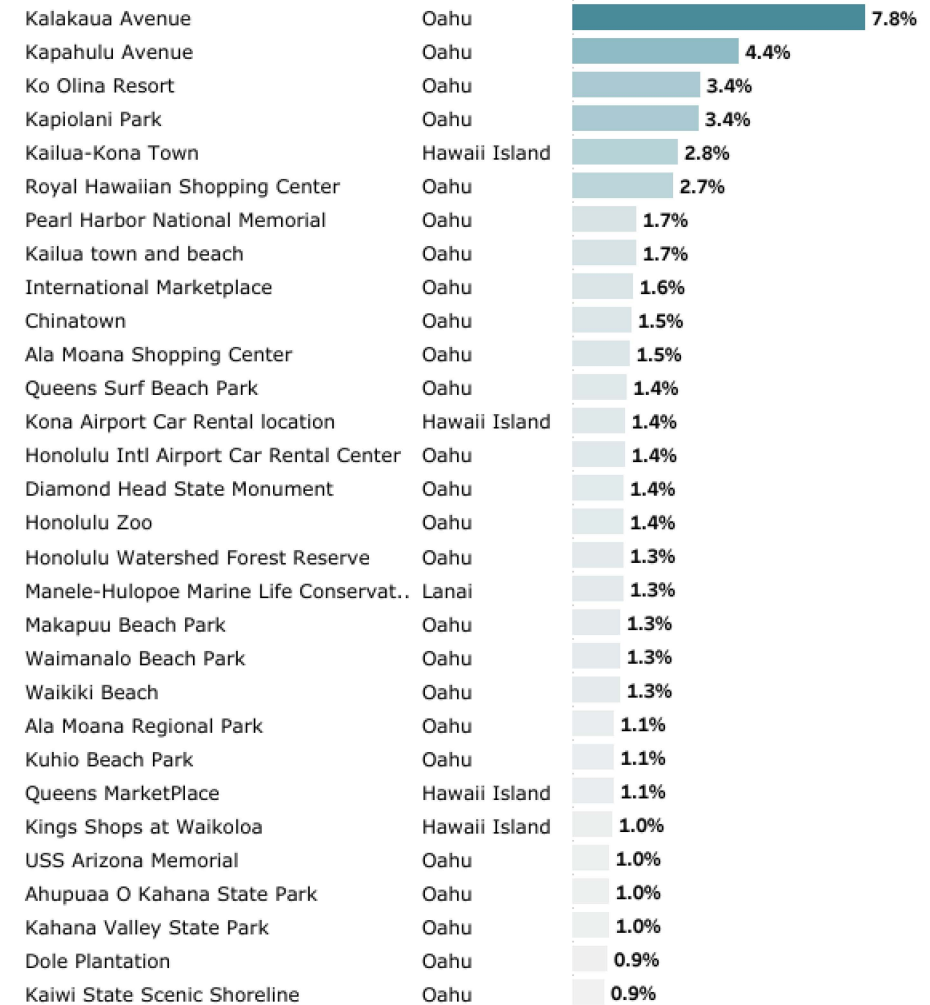


Source: UM

Cross Visitation on other Islands

POI: Lahaina Bypass

% share of visits



Source: UM

Maui Island Visitation Insights for Residents

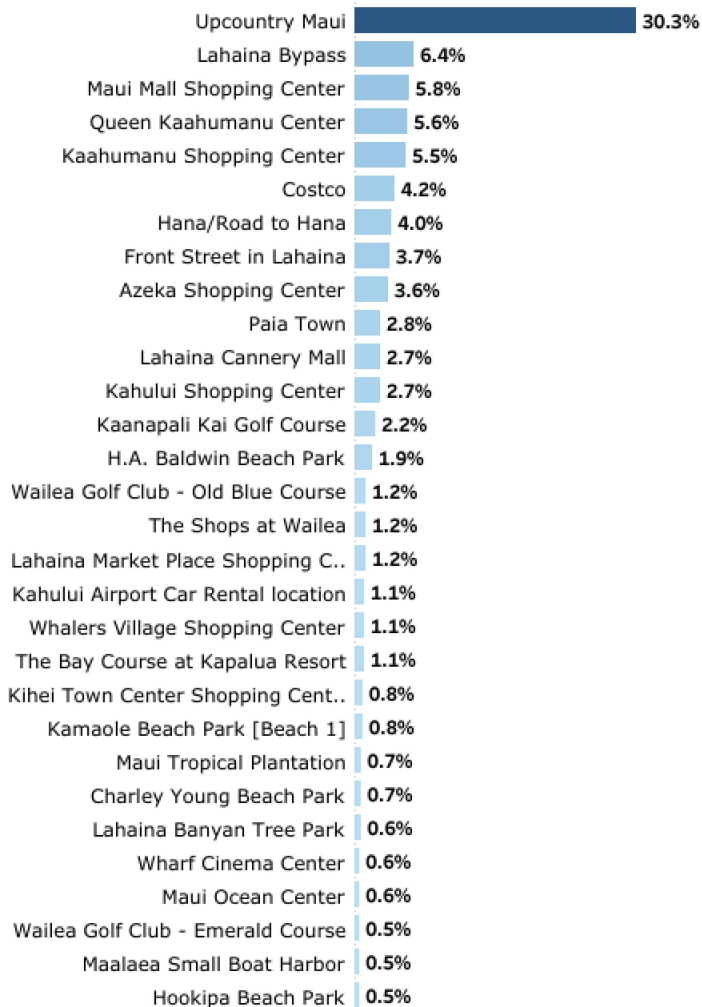
Date Range: 01-Feb-21 to 28-Feb-21

Island: Maui Island
 Residence County: Maui, HI
 From Date: 01-Feb-21
 To Date: 28-Feb-21

Maui Island Top POIs Visited by Residents

Date Range: 01-Feb-21 to 28-Feb-21

% share of visits

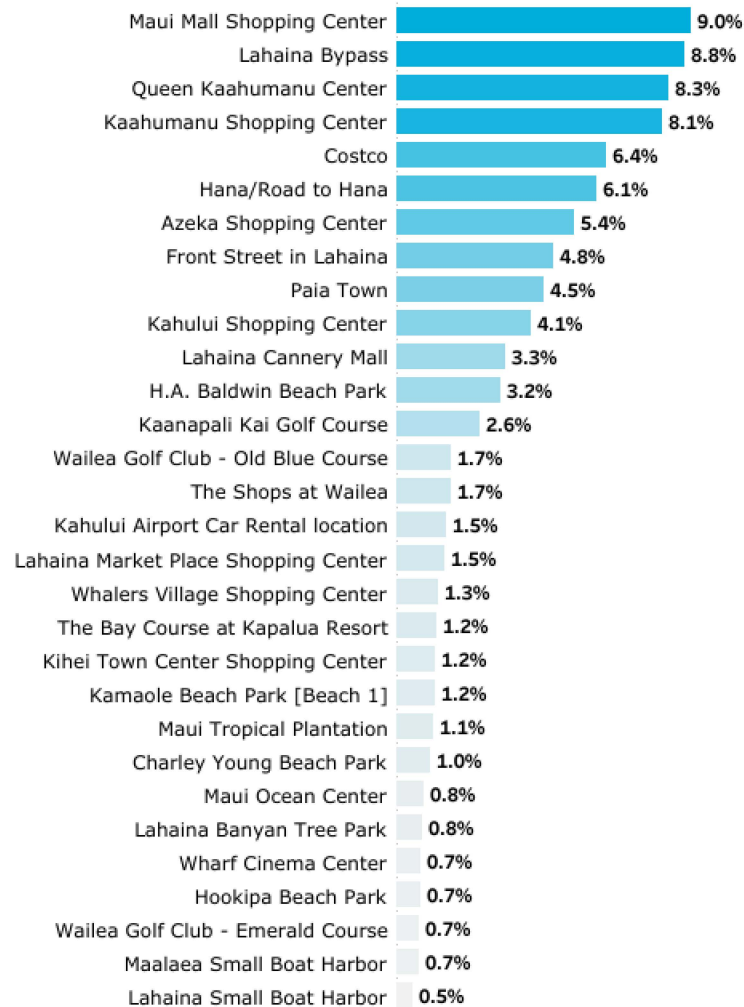


Source: UM

Cross Visitation on Maui Island

POI: Upcountry Maui

% share of visits

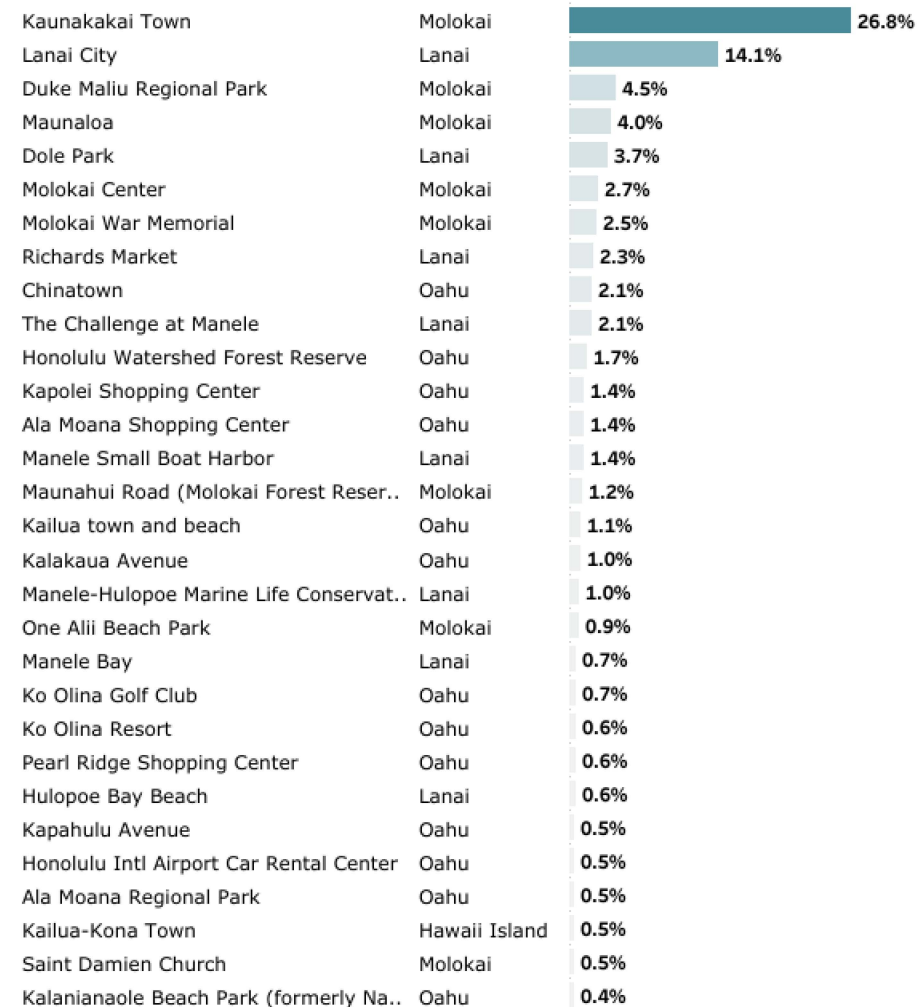


Source: UM

Cross Visitation on other Islands

POI: Upcountry Maui

% share of visits



Source: UM

Maui Island Lodging Summary

February 2021

Month: February 2021
Island: Maui Island

February 2021 & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	39.5%	▼ -44.3%	563.6K	▼ -2.9%	222.6K	▼ -54.2%
Hotel	31.7%	▼ -49.5%	354.8K	▼ -0.3%	112.5K	▼ -61.1%
Short Term Rentals	52.8%	▼ -35.1%	208.8K	▼ -6.9%	110.2K	▼ -44.1%
Timeshare						

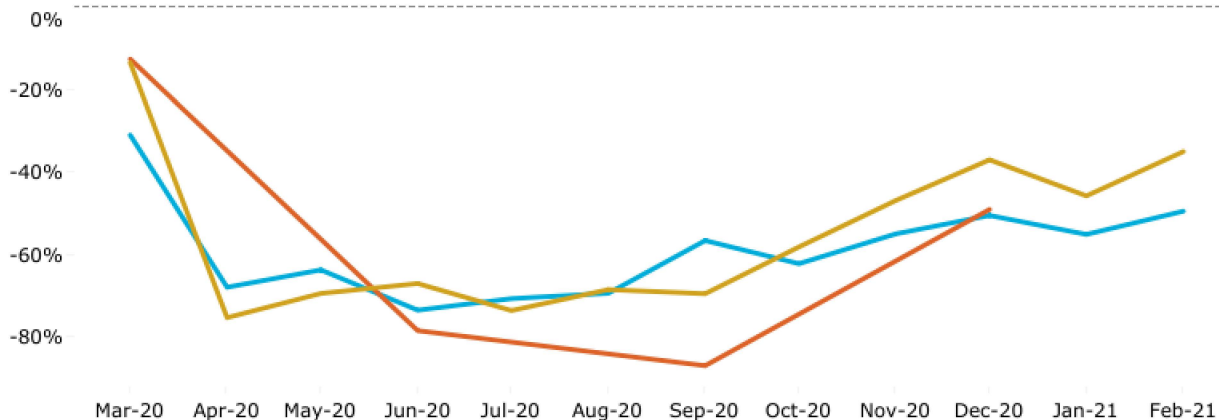
February 2021 YTD Calendar Year & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	34.0%	▼ -48.1%	1,223.9K	▼ -0.6%	415.7K	▼ -58.9%
Hotel	26.5%	▼ -52.4%	747.7K	▼ -0.3%	198.4K	▼ -66.5%
Short Term Rentals	45.6%	▼ -41.1%	476.2K	▼ -1.2%	217.3K	▼ -48.0%
Timeshare						

*Timeshare information is only available after the end of each quarter
OCC YOY change is percentage point change
Source: STR, Transparent & HTA

Occupancy Change

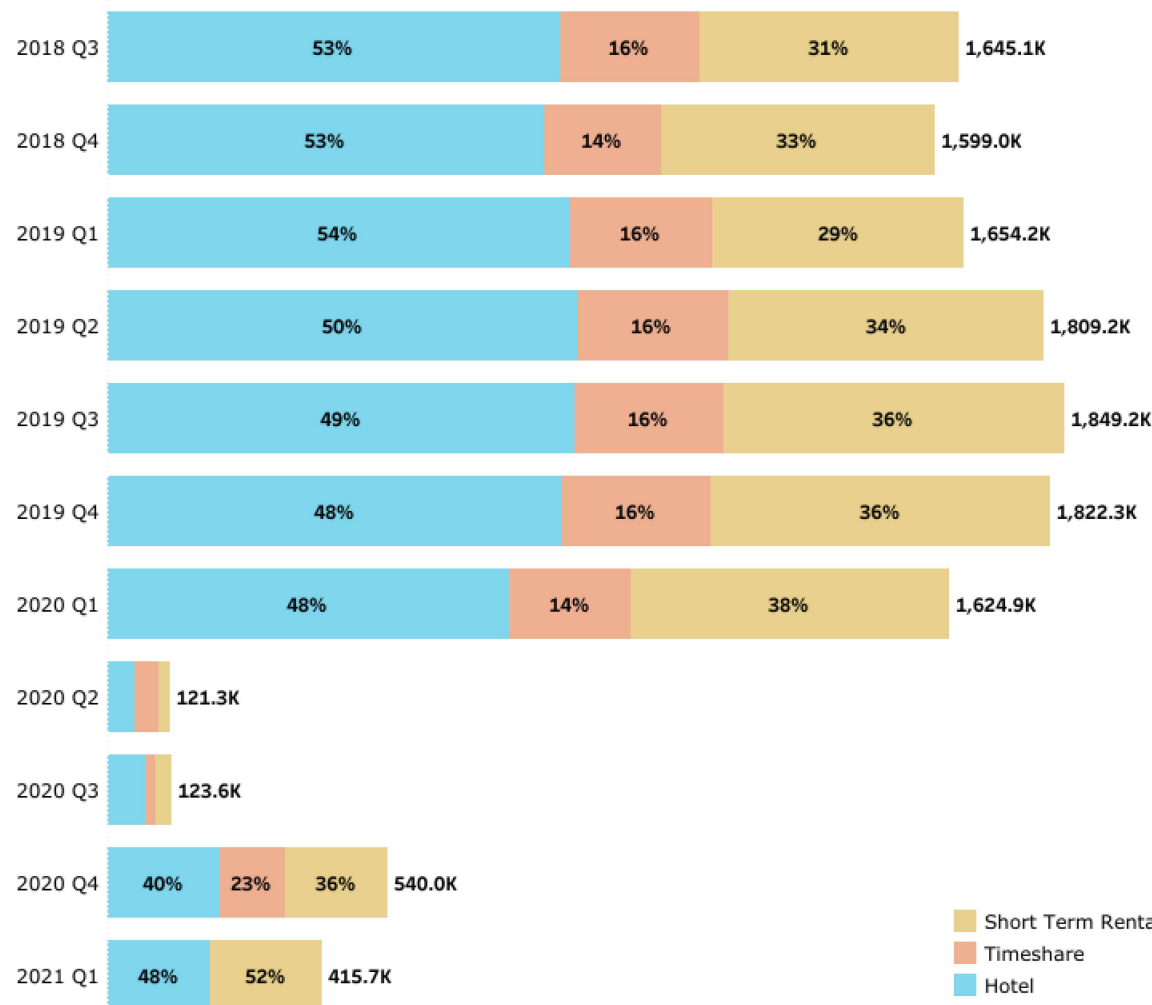
% point change, compared to same month in previous year



Source: STR, Transparent & HTA

Room Demand and Contribution

February 2021, Maui Island



*2021 Q1 does not include timeshare data. Timeshare information is only available after the end of each quarter
Source: STR, Transparent & HTA

Month
February 2021

Island
Hawaii Island

Visitor Arrivals

Total Visitors & % change YOY, February 2021

46.6K ▼ -68.6%

Expenditure by Visitors

Total Expenditure & % change YOY, February 2021

\$70.0M ▼ -68.3%

Avg. Length of Stay

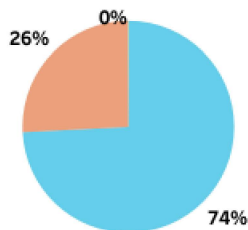
All visitors, February 2021

10.9 Days

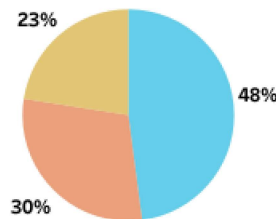
Origin Market Share

% share of visitor for February 2021

February 2021



February 2020

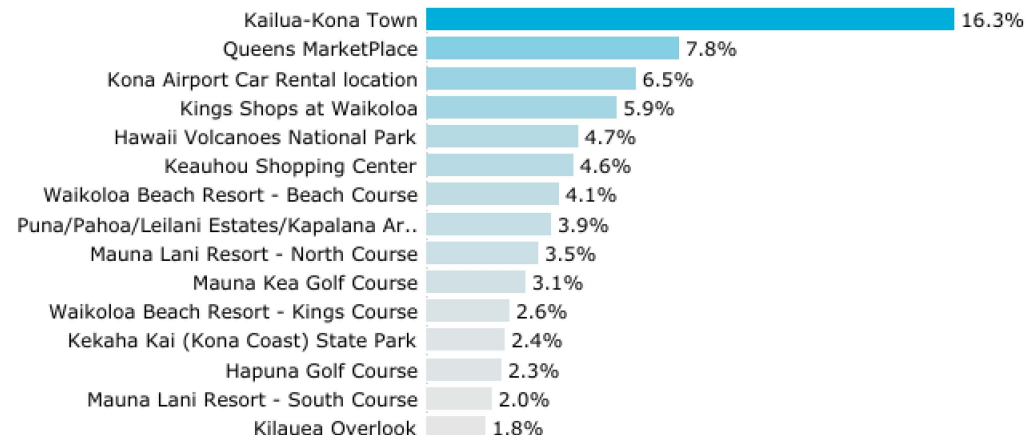


■ US West ■ US East ■ International

Source: HTA

Top POIs Visited by Visitors

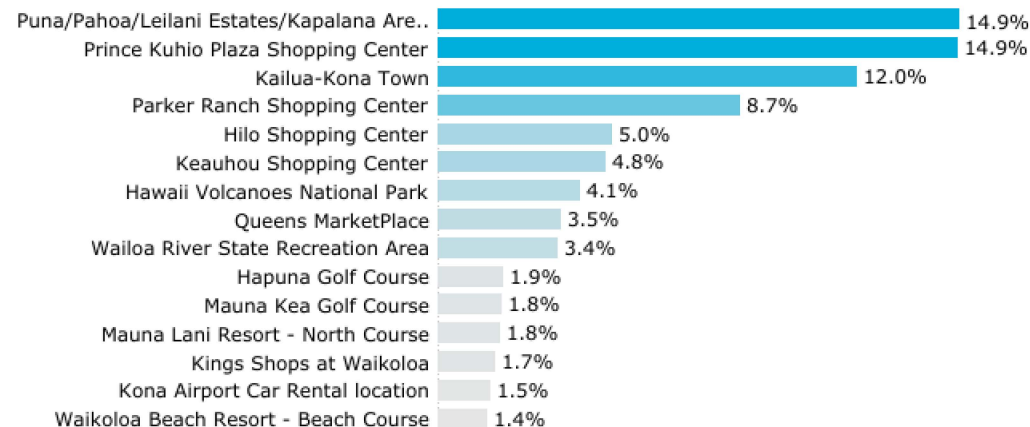
% share of visits, February 2021



Source: UM

Top POIs Visited by Residents

% share of visits, February 2021

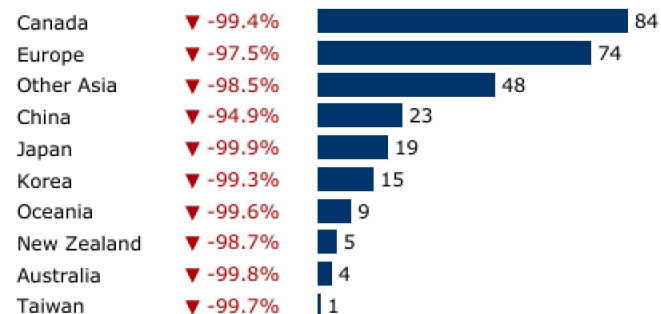


Source: UM

* Residents refer to residents of the State of Hawaii, all islands

Visitors from International Markets

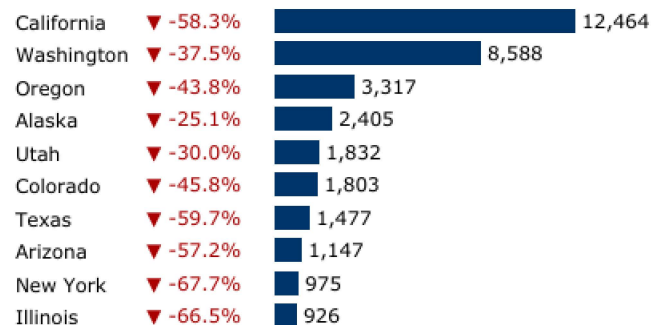
% change YOY & no of visitors



Source: HTA

Top 10 Domestic Markets

% change YOY & no of visitors



Source: HTA

Hawaii Island Visitation Insights for Visitors

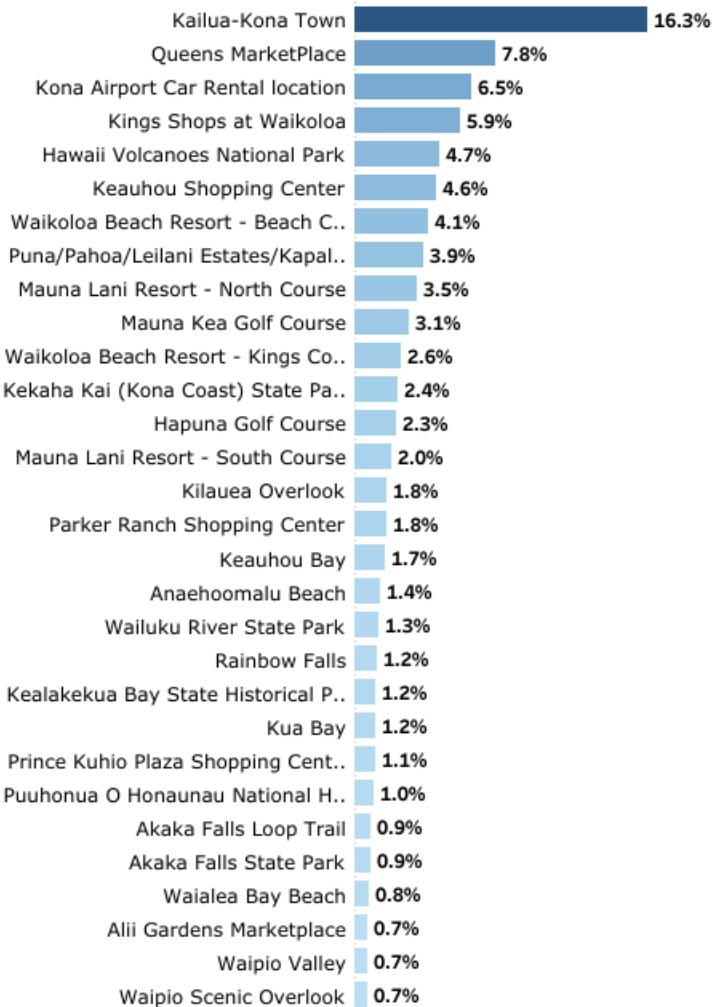
Date Range: 01-Feb-21 to 28-Feb-21

Island: Hawaii Island | From Date: 01-Feb-21 | To Date: 28-Feb-21

Hawaii Island Top POIs Visited by Visitors

Date Range: 01-Feb-21 to 28-Feb-21

% share of visits

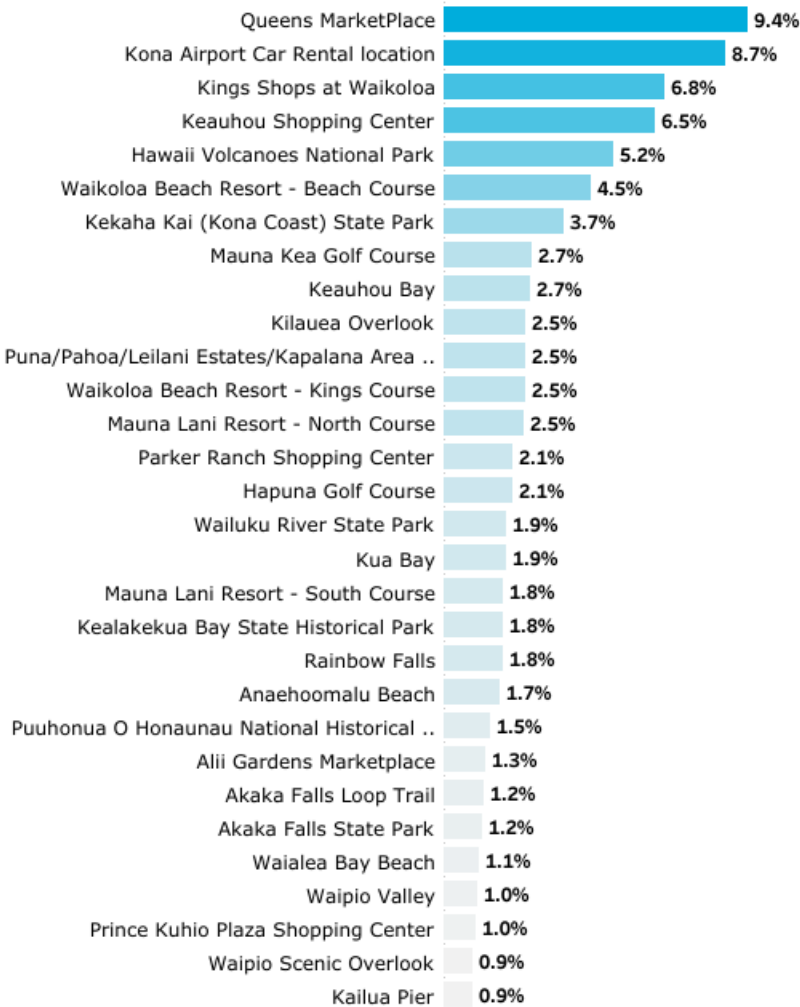


Source: UM

Cross Visitation on Hawaii Island

POI: Kailua-Kona Town

% share of visits

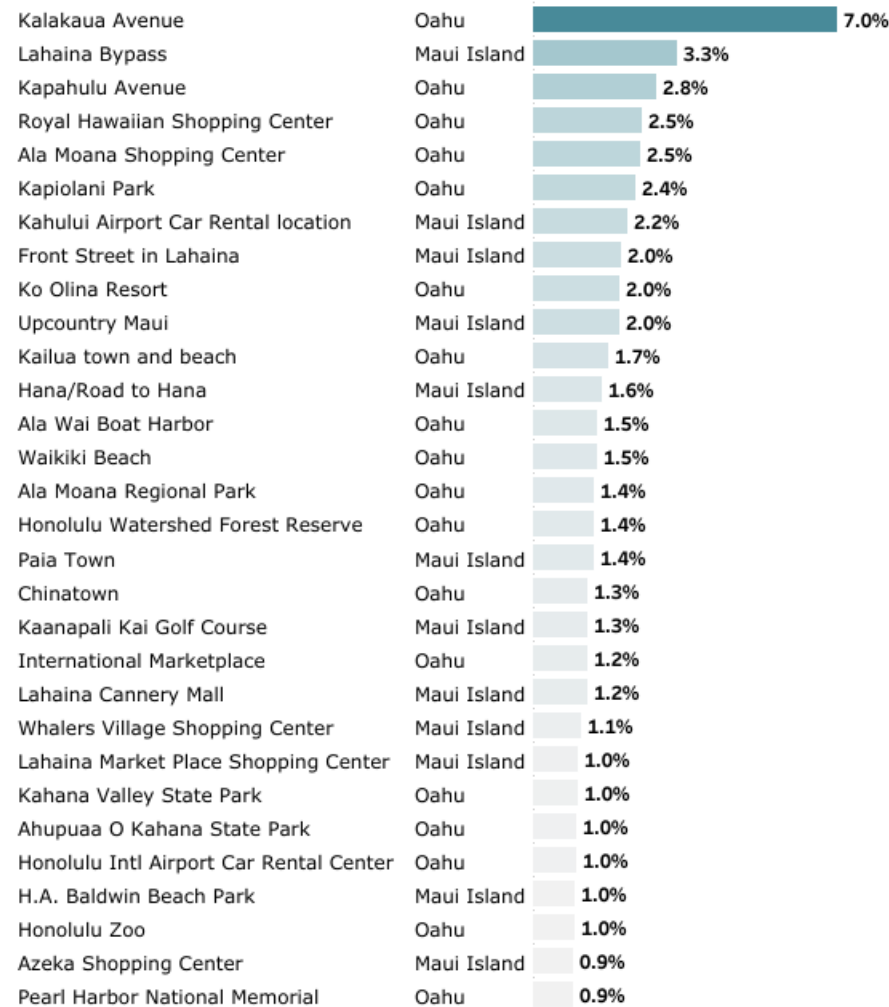


Source: UM

Cross Visitation on other Islands

POI: Kailua-Kona Town

% share of visits



Source: UM

Hawaii Island Visitation Insights for Residents

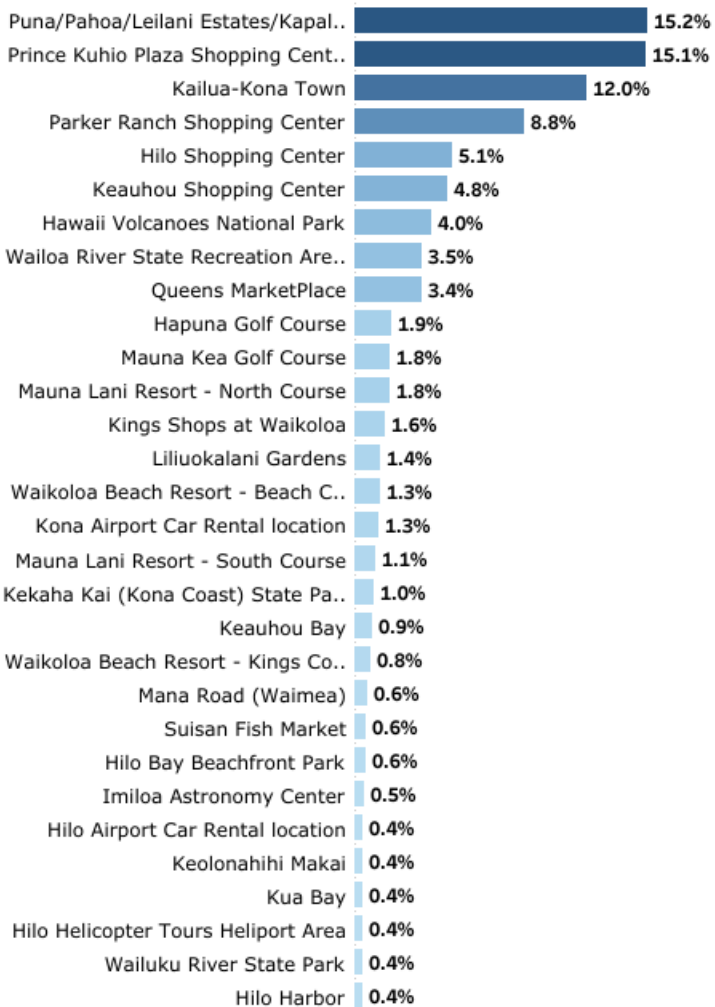
Date Range: 01-Feb-21 to 28-Feb-21

Island	Residence County	From Date	To Date
Hawaii Island	Hawaii, HI	01-Feb-21	28-Feb-21

Hawaii Island Top POIs Visited by Residents

Date Range: 01-Feb-21 to 28-Feb-21

% share of visits

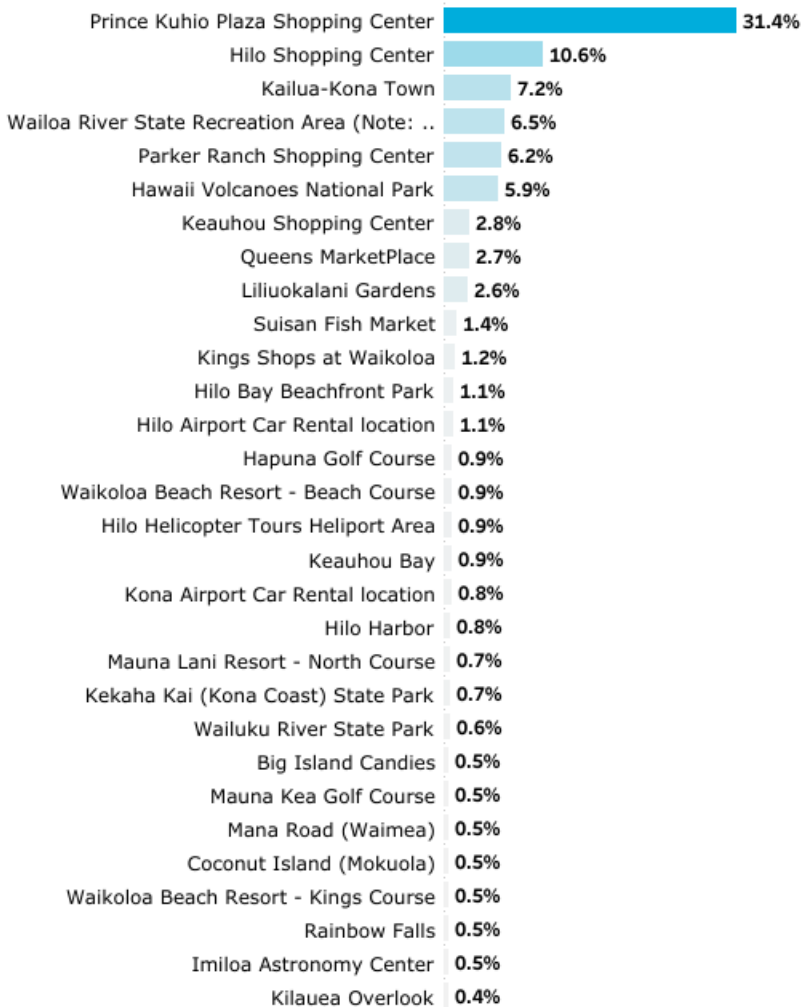


Source: UM

Cross Visitation on Hawaii Island

POI: Puna/Pahoia/Leilani Estates/Kapalana Area - Lava flow area

% share of visits

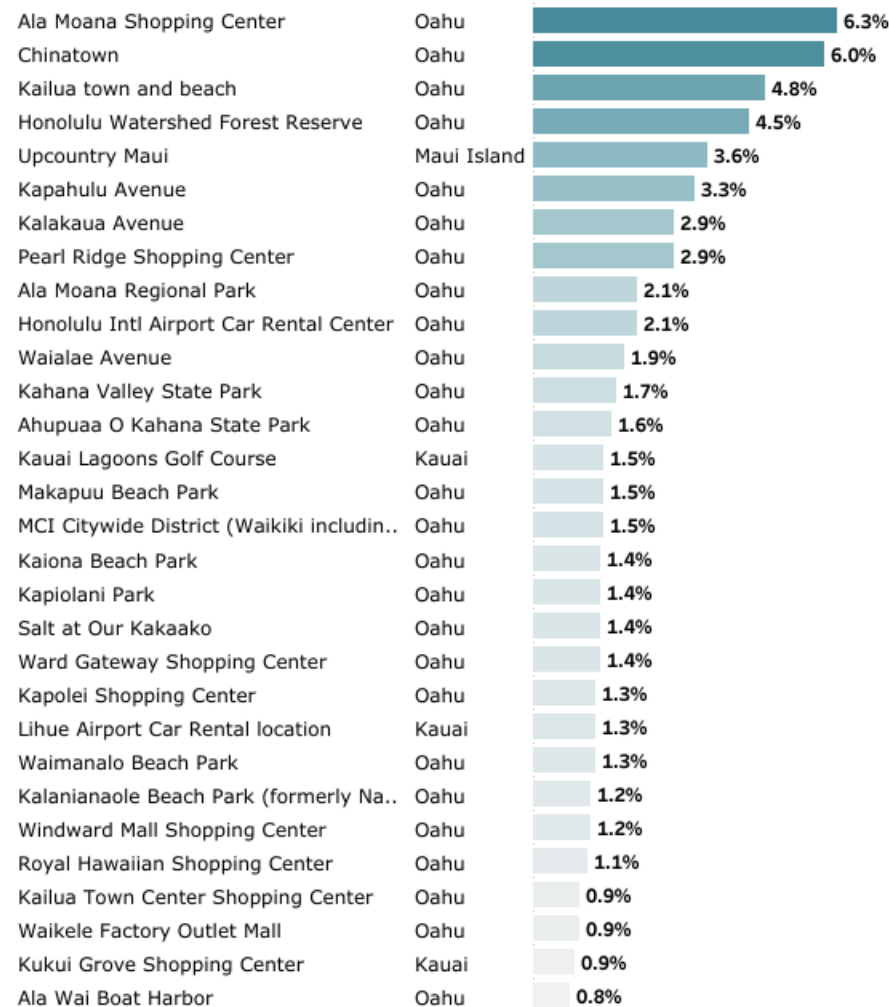


Source: UM

Cross Visitation on other Islands

POI: Puna/Pahoia/Leilani Estates/Kapalana Area - Lava flow area

% share of visits



Source: UM

Hawaii Island Lodging Summary

February 2021

Month: February 2021
Island: Hawaii Island

February 2021 & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	44.6%	▼ -39.5%	302.5K	▼ -16.4%	135.0K	▼ -55.7%
Hotel	35.3%	▼ -49.3%	186.8K	▼ -0.2%	66.0K	▼ -58.4%
Short Term Rentals	59.6%	▼ -24.0%	115.8K	▼ -33.8%	69.0K	▼ -52.8%
Timeshare						

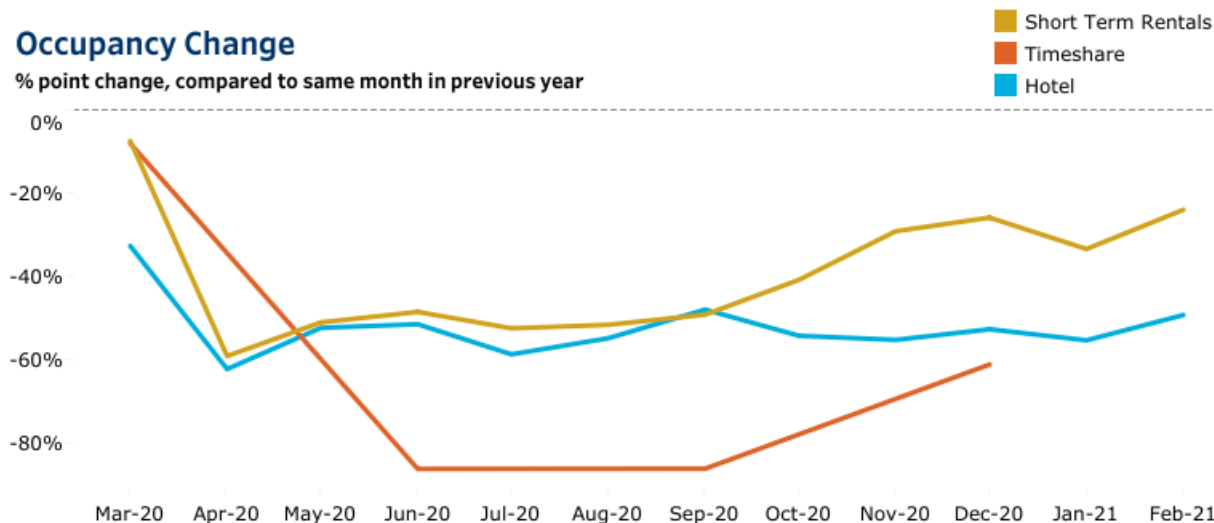
February 2021 YTD Calendar Year & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	39.8%	▼ -43.2%	651.2K	▼ -14.4%	258.9K	▼ -59.0%
Hotel	30.9%	▼ -52.5%	394.1K	▼ -0.1%	121.8K	▼ -63.0%
Short Term Rentals	53.3%	▼ -29.2%	257.1K	▼ -29.9%	137.1K	▼ -54.7%
Timeshare						

*Timeshare information is only available after the end of each quarter
OCC YOY change is percentage point change
Source: STR, Transparent & HTA

Occupancy Change

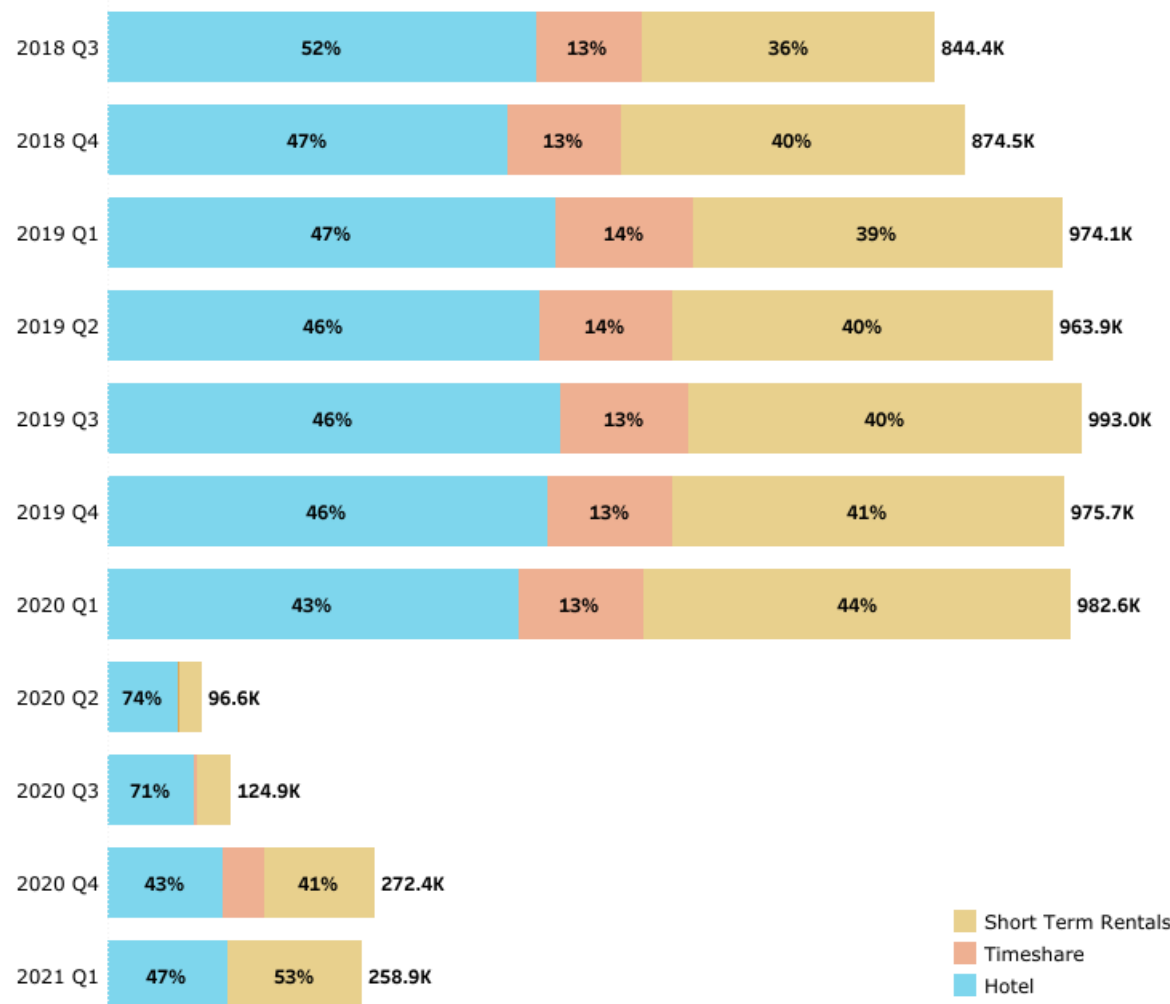
% point change, compared to same month in previous year



Source: STR, Transparent & HTA

Room Demand and Contribution

February 2021, Hawaii Island



*2021 Q1 does not include timeshare data. Timeshare information is only available after the end of each quarter
Source: STR, Transparent & HTA

Month
February 2021

Island
Kauai

Visitor Arrivals

Total Visitors & % change YOY, February 2021

7.3K ▼ -93.4%

Expenditure by Visitors

Total Expenditure & % change YOY, February 2021

\$15.8M ▼ -90.8%

Avg. Length of Stay

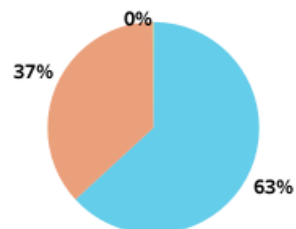
All visitors, February 2021

14.2 Days

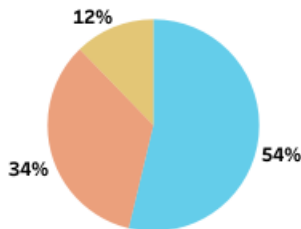
Origin Market Share

% share of visitor for February 2021

February 2021



February 2020

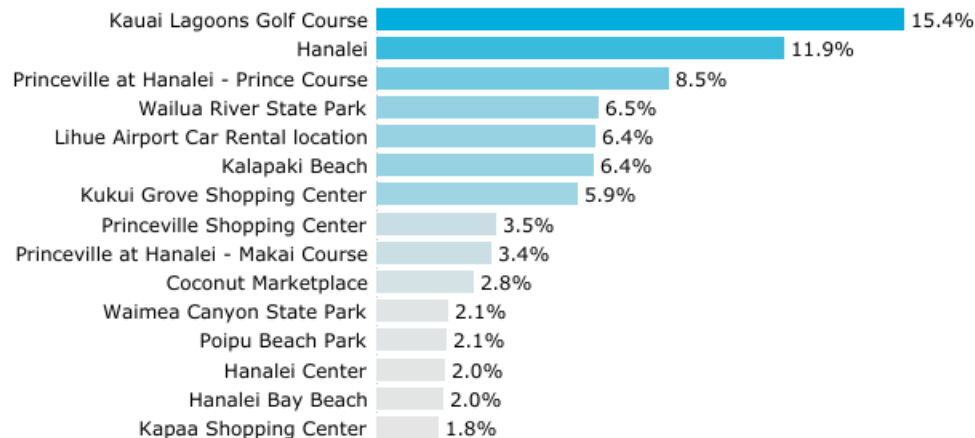


■ US West ■ US East ■ International

Source: HTA

Top POIs Visited by Visitors

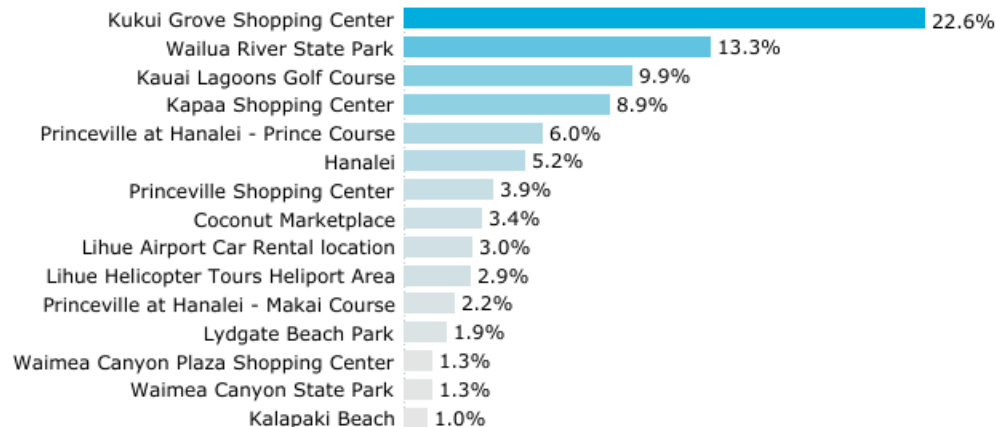
% share of visits, February 2021



Source: UM

Top POIs Visited by Residents

% share of visits, February 2021

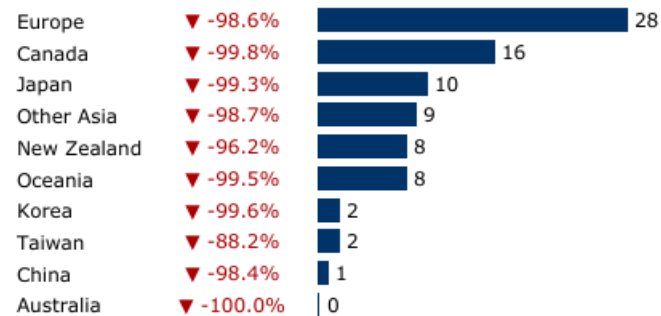


Source: UM

* Residents refer to residents of the State of Hawaii, all islands

Visitors from International Markets

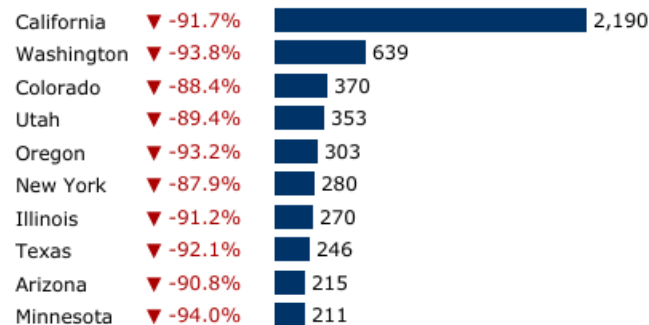
% change YOY & no of visitors



Source: HTA

Top 10 Domestic Markets

% change YOY & no of visitors



Source: HTA

Kauai Visitation Insights for Visitors

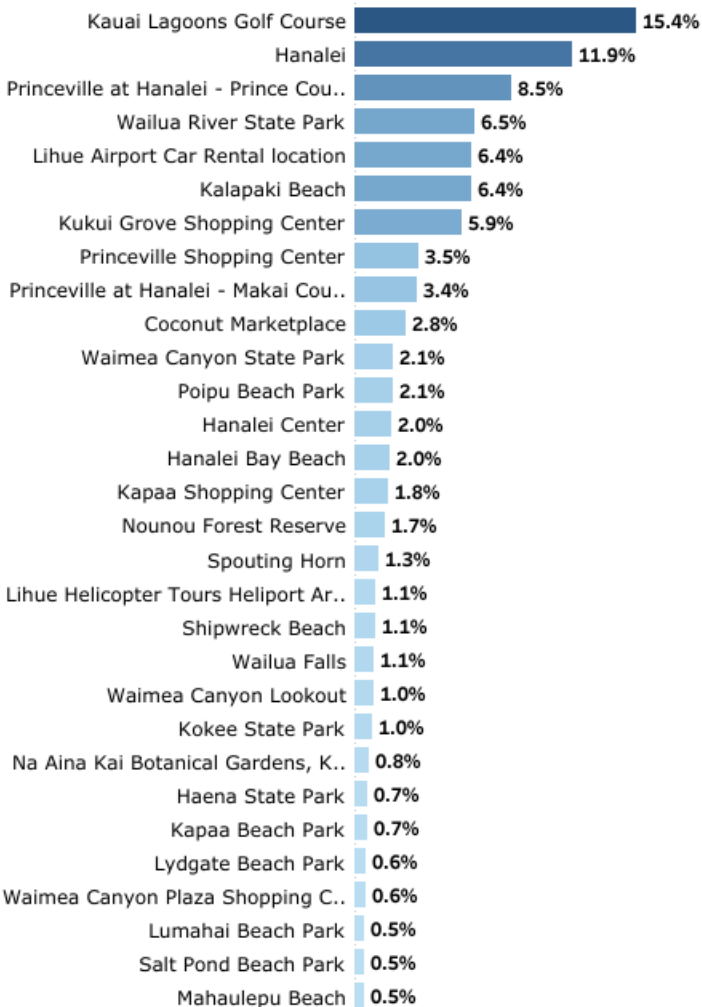
Date Range: 01-Feb-21 to 28-Feb-21

Island: Kauai
From Date: 01-Feb-21
To Date: 28-Feb-21

Kauai Top POIs Visited by Visitors

Date Range: 01-Feb-21 to 28-Feb-21

% share of visits

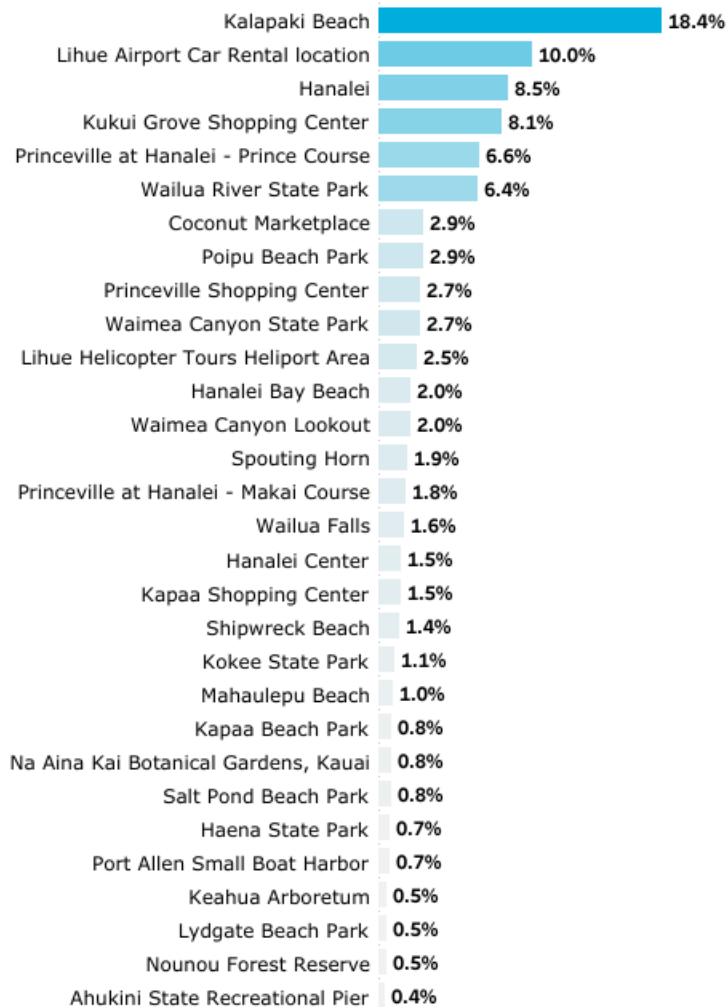


Source: UM

Cross Visitation on Kauai

POI: Kauai Lagoons Golf Course

% share of visits

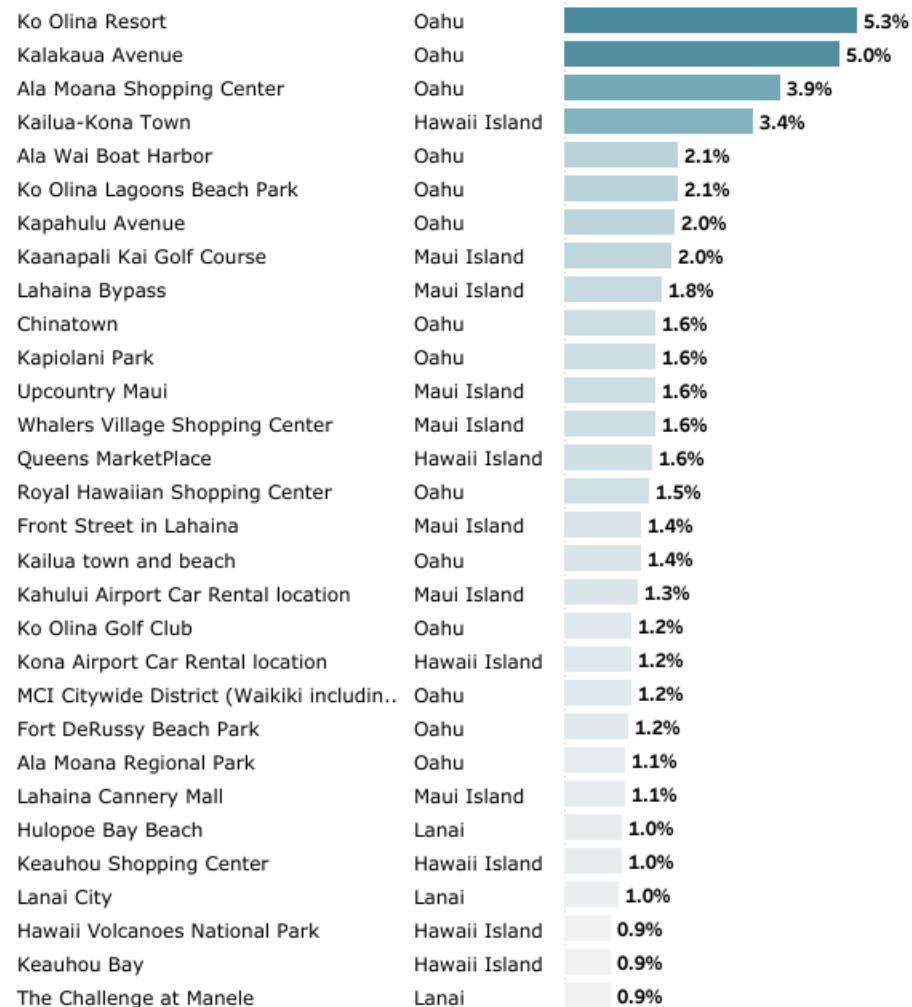


Source: UM

Cross Visitation on other Islands

POI: Kauai Lagoons Golf Course

% share of visits



Source: UM

Kauai Visitation Insights for Residents

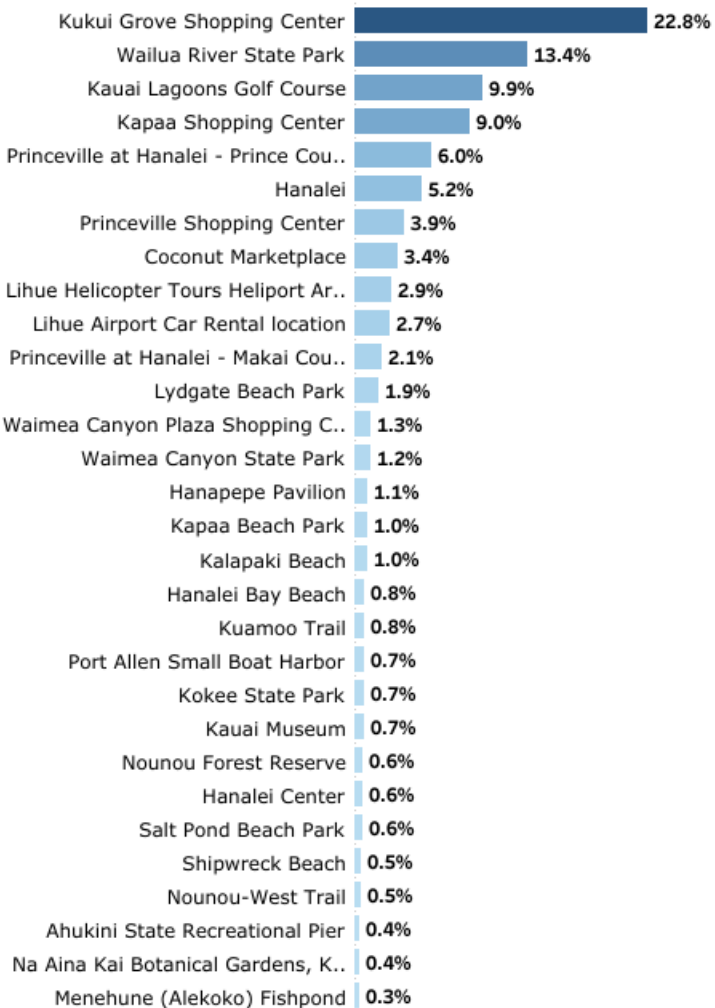
Date Range: 01-Feb-21 to 28-Feb-21

Island: Kauai
 Residence County: Kauai, HI
 From Date: 01-Feb-21
 To Date: 28-Feb-21

Kauai Top POIs Visited by Residents

Date Range: 01-Feb-21 to 28-Feb-21

% share of visits

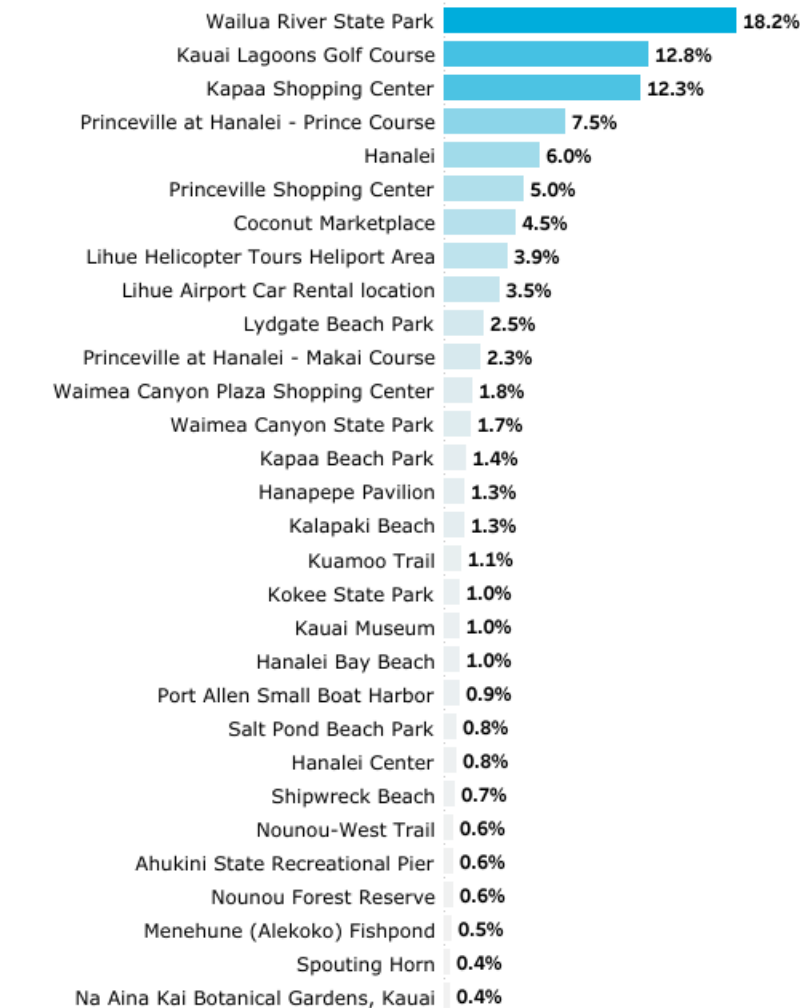


Source: UM

Cross Visitation on Kauai

POI: Kukui Grove Shopping Center

% share of visits

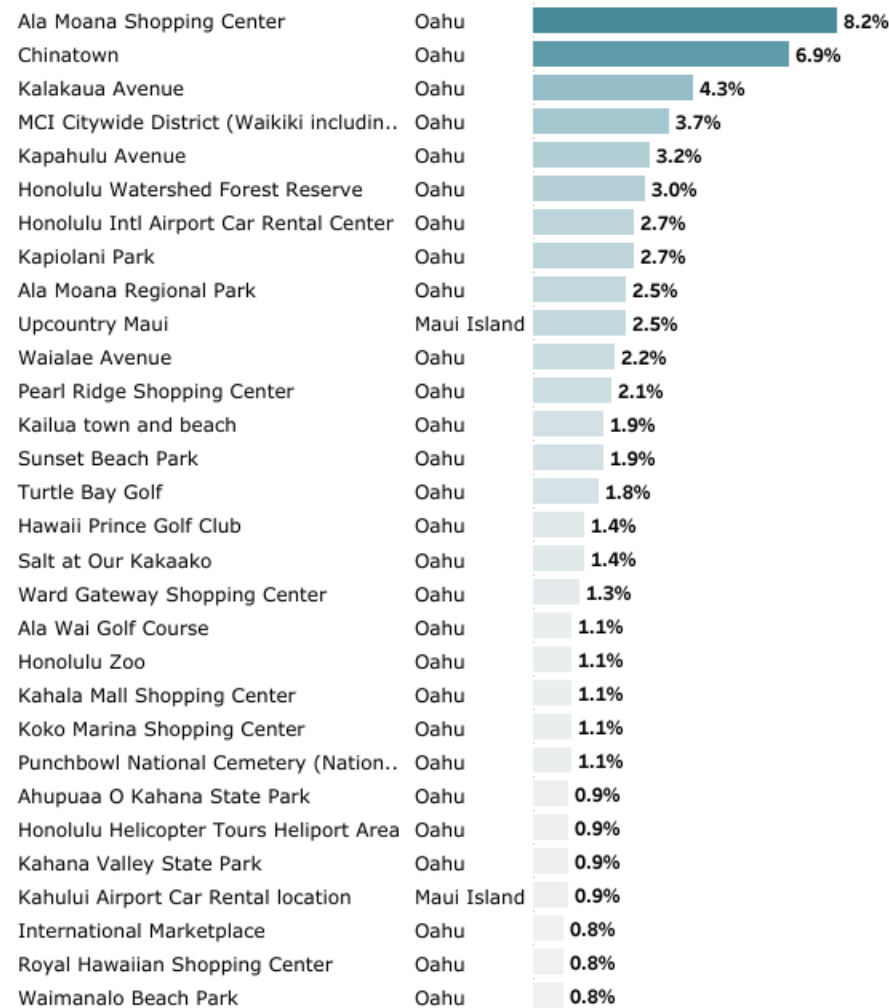


Source: UM

Cross Visitation on other Islands

POI: Kukui Grove Shopping Center

% share of visits



Source: UM

Month
February 2021

Island
Kauai

February 2021 & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	23.5%	▼ -60.0%	173.8K	▼ -23.3%	40.8K	▼ -78.5%
Hotel	26.4%	▼ -57.4%	90.8K	▼ -22.9%	24.0K	▼ -75.7%
Short Term Rentals	20.3%	▼ -62.9%	83.0K	▼ -23.8%	16.8K	▼ -81.4%
Timeshare						

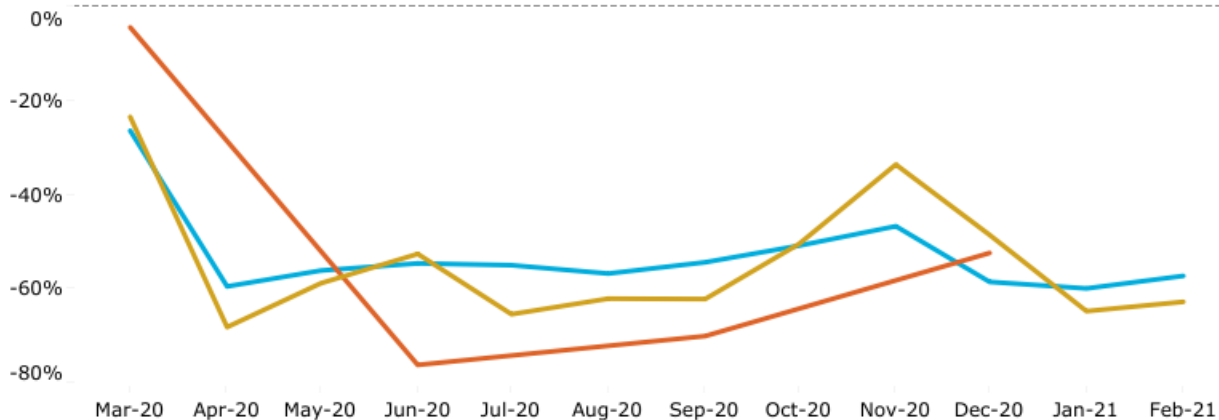
February 2021 YTD Calendar Year & YOY Change

	Occupancy	YOY	Supply	YOY	Demand	YOY
..	19.8%	▼ -61.5%	381.8K	▼ -19.2%	75.5K	▼ -80.3%
Hotel	22.2%	▼ -58.8%	191.4K	▼ -22.9%	42.5K	▼ -78.9%
Short Term Rentals	17.3%	▼ -64.2%	190.4K	▼ -15.0%	33.0K	▼ -81.9%
Timeshare						

*Timeshare information is only available after the end of each quarter
OCC YOY change is percentage point change
Source: STR, Transparent & HTA

Occupancy Change

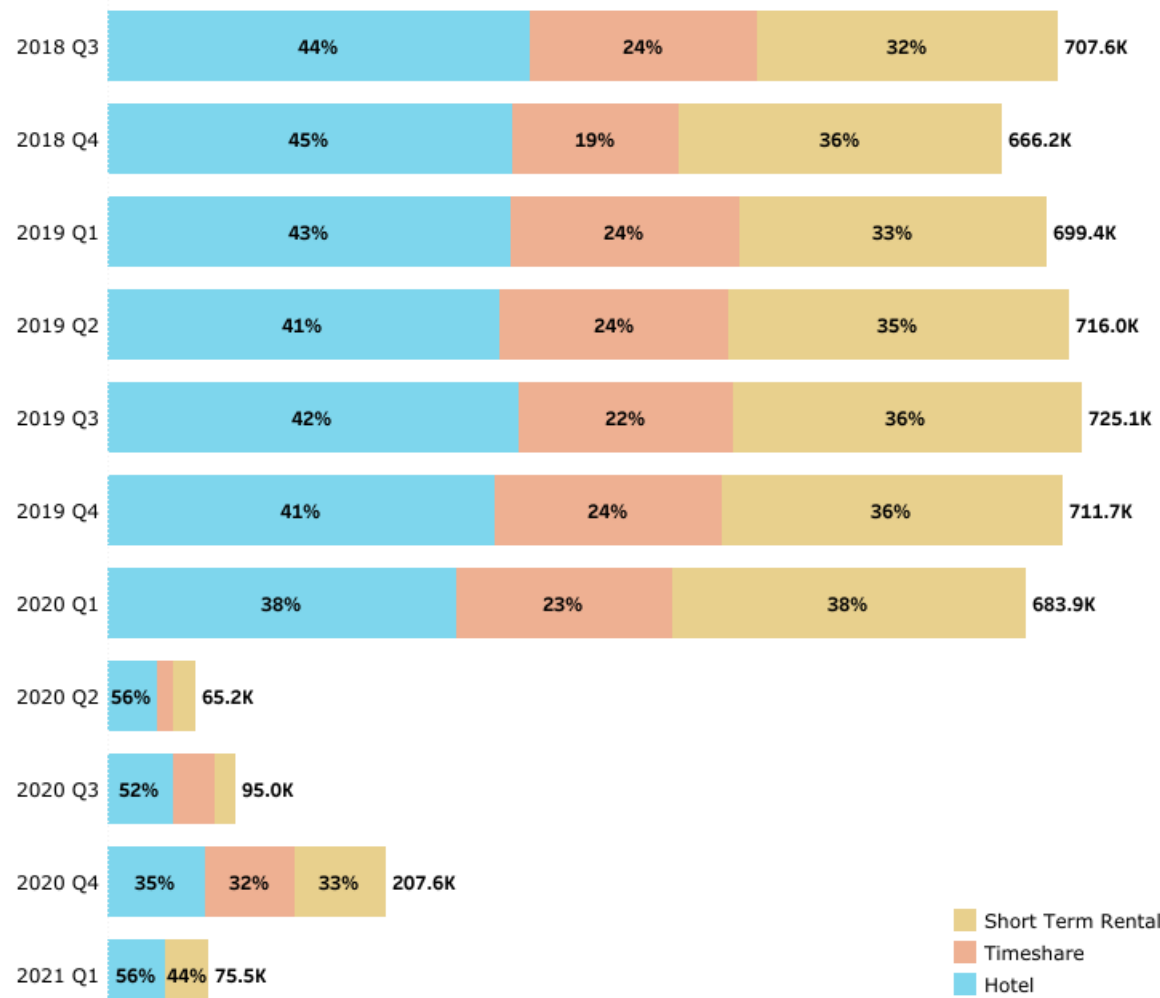
% point change, compared to same month in previous year



Source: STR, Transparent & HTA

Room Demand and Contribution

February 2021, Kauai

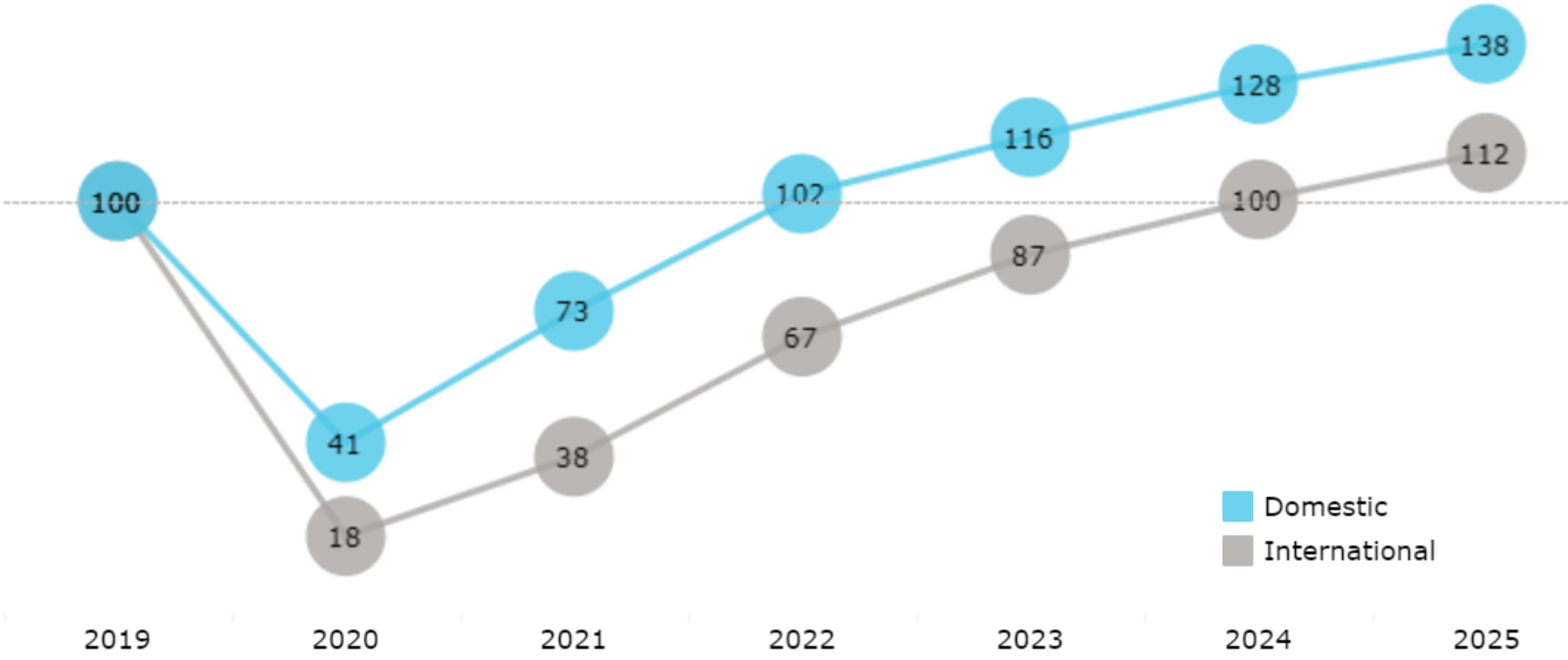


*2021 Q1 does not include timeshare data. Timeshare information is only available after the end of each quarter
Source: STR, Transparent & HTA

TOURISM ECONOMICS GLOBAL CITY TRAVEL OUTLOOK

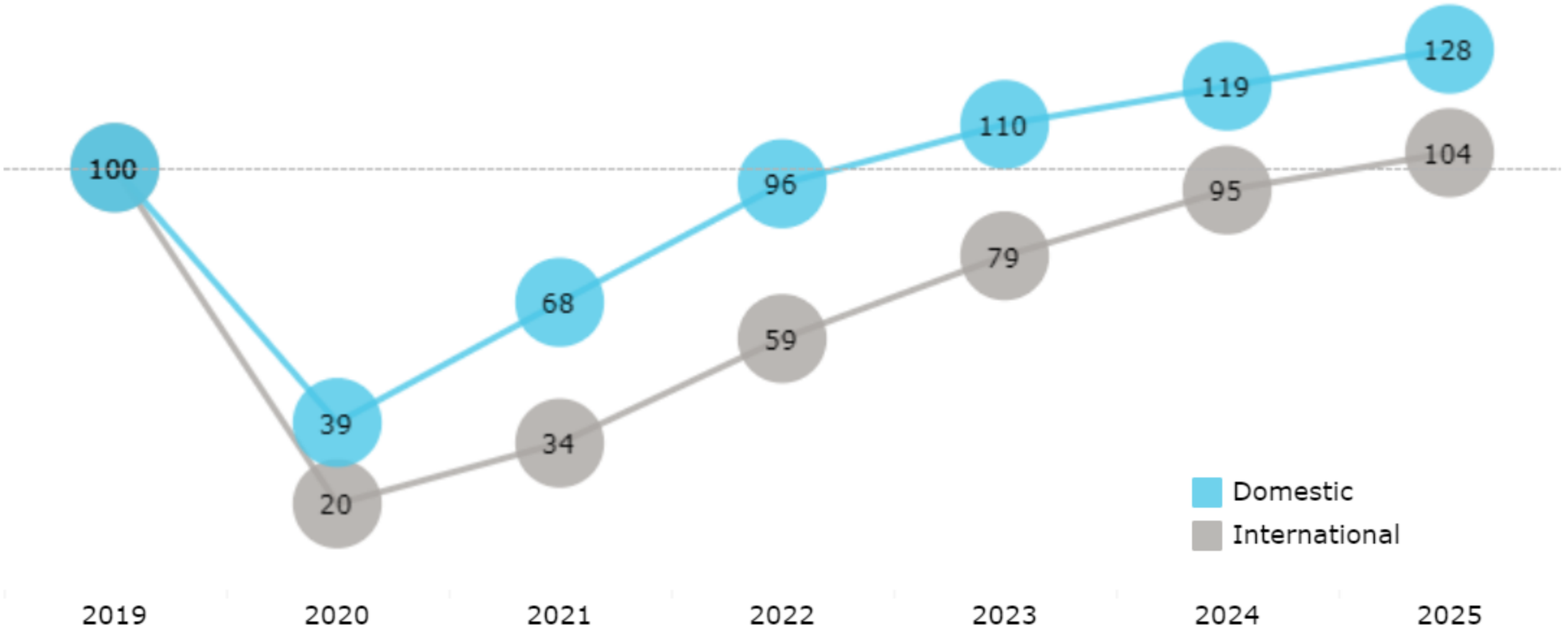
Visitor Arrivals

Honolulu, (Index 2019=100)



Spending by Visitors

Honolulu, (Index 2019= 100)



Agenda Item

8

Presentation, Discussion and Action on
HTA's Financial Reports for March 2021

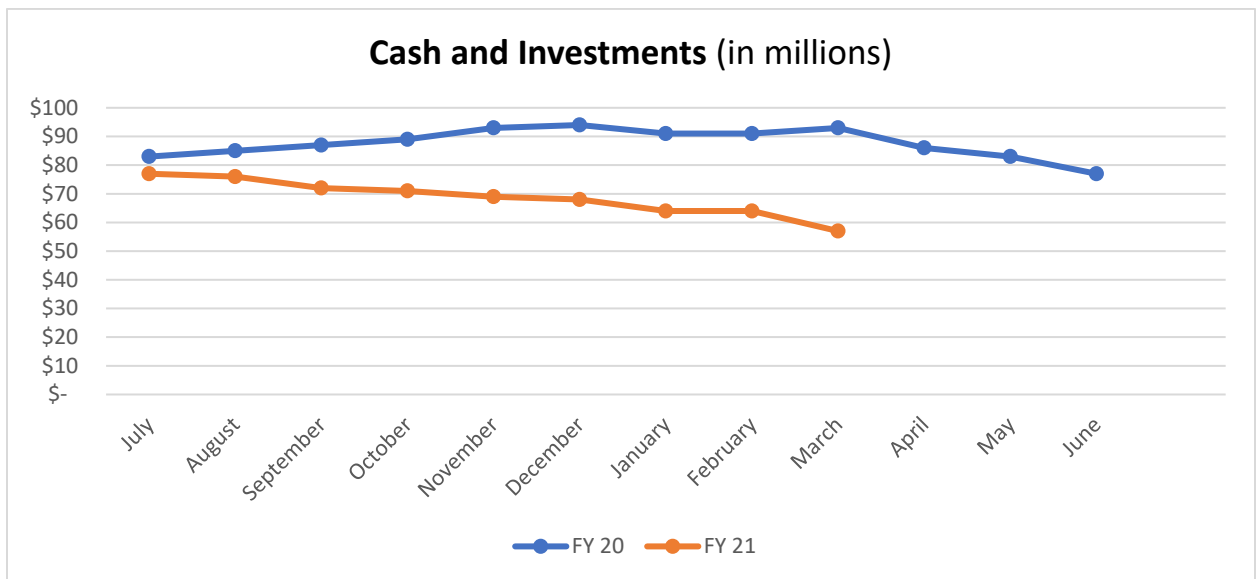
HAWAII TOURISM

AUTHORITY

Financial Statements – Executive Summary March 1, 2021 – March 31, 2021

Tourism Special Fund:

1. \$57.8M in cash and investments



- a. Includes \$5M in Emergency Fund held as investments.
 - i. Approximately \$5.1M held in money market funds
 - ii. Further detail provided in the financial statements (as of February 2021)
- b. Cash from February 28, 2021 decreased by approximately \$6.4M due to payments of \$6.5M in expenditures, partially offset by receiving \$160K in miscellaneous revenue.

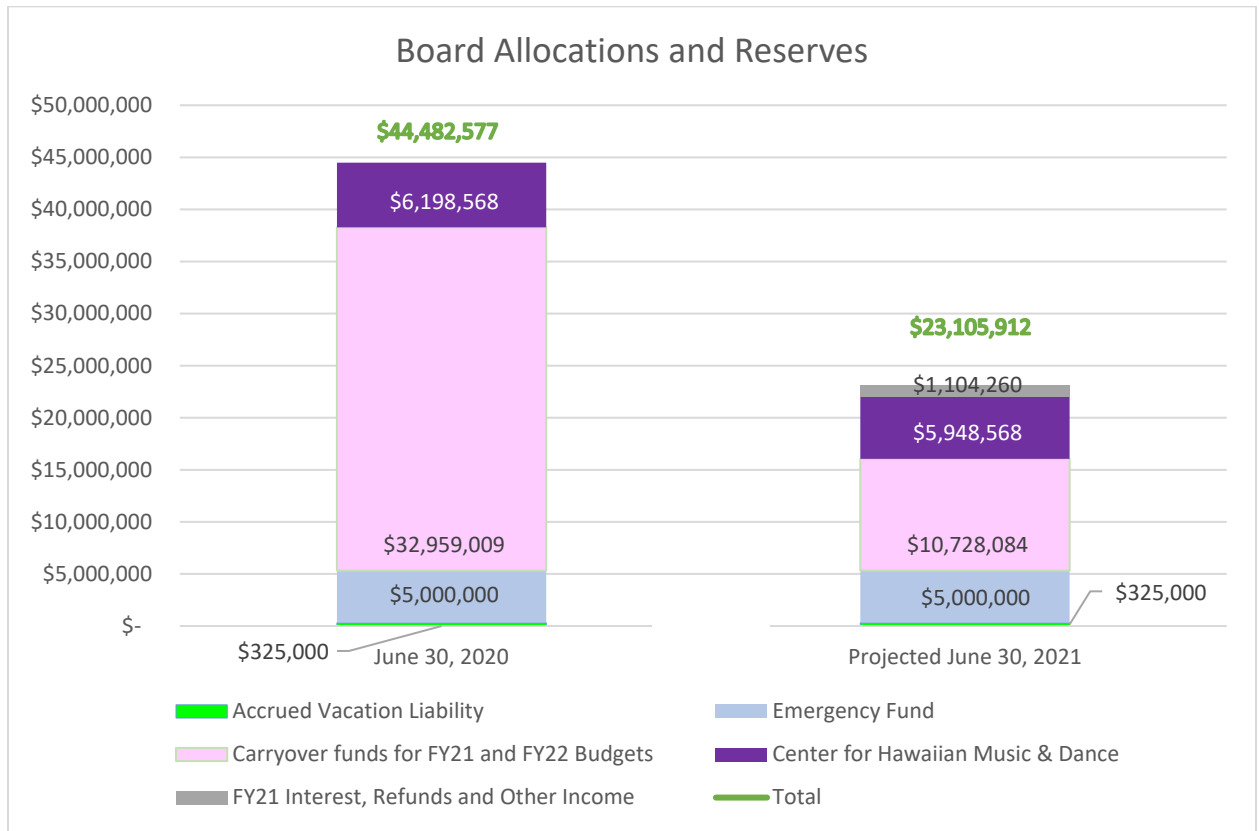
2. HTA's outstanding encumbrances are summarized as follows:

\$5.7M	Prior year encumbrances currently being spent down	
\$27.9M	Current year encumbrances remaining	
\$33.6M	Total encumbrances outstanding at March 31, 2021	

The \$5.7M in prior year encumbrances compares against a \$32.8M balance at the beginning of FY 2021, which included \$14.7M in encumbrances we anticipated cancelling heading into FY2021 – all of which have now been cancelled. Staff routinely

makes a concerted effort to liquidate older encumbrances that should no longer be encumbered and that is reflected here.

3. \$23.1M reserved as Board allocations projected for the end of FY 2021, compared to \$44.4M at the beginning of the fiscal year. (This does not include approximately \$3M in COVID-related cost reimbursements that HTA anticipated receiving. It does include \$5M Emergency Fund and \$5.9M for the Center for Hawaiian Music & Dance.) A supporting schedule is embedded in these financial statements to provide greater detail. These balances are comprised of the following:

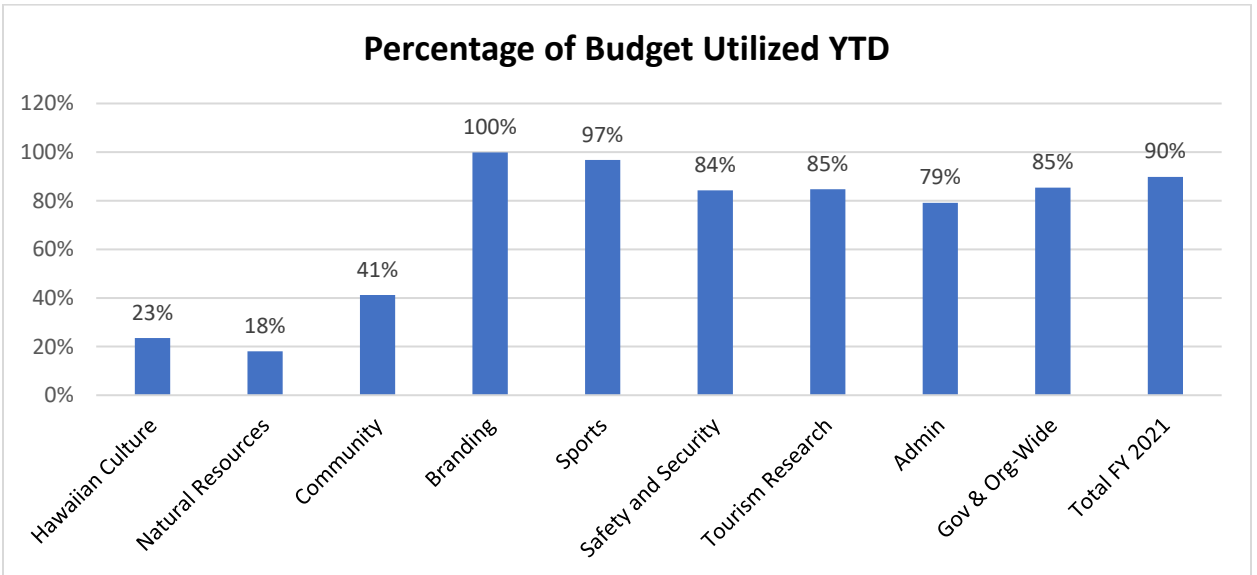
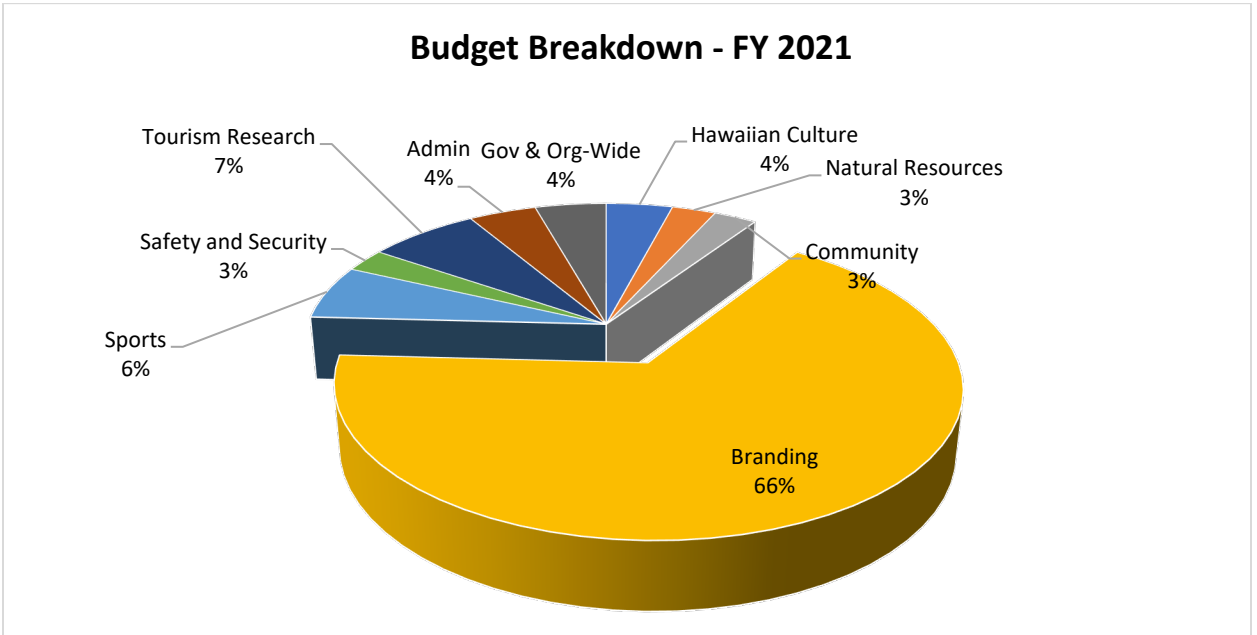


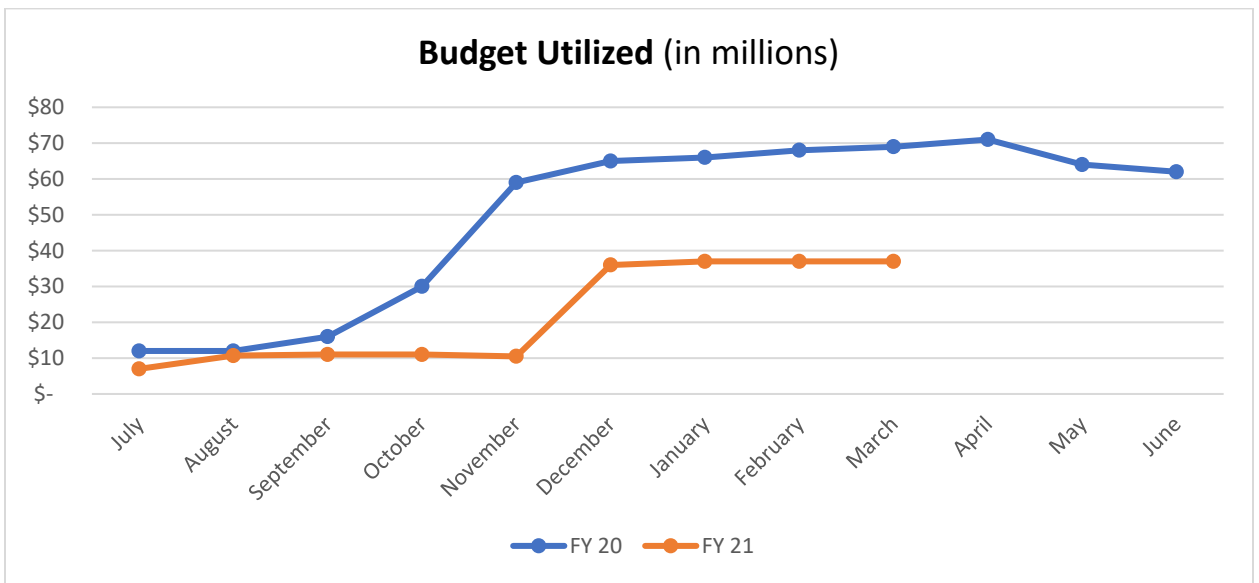
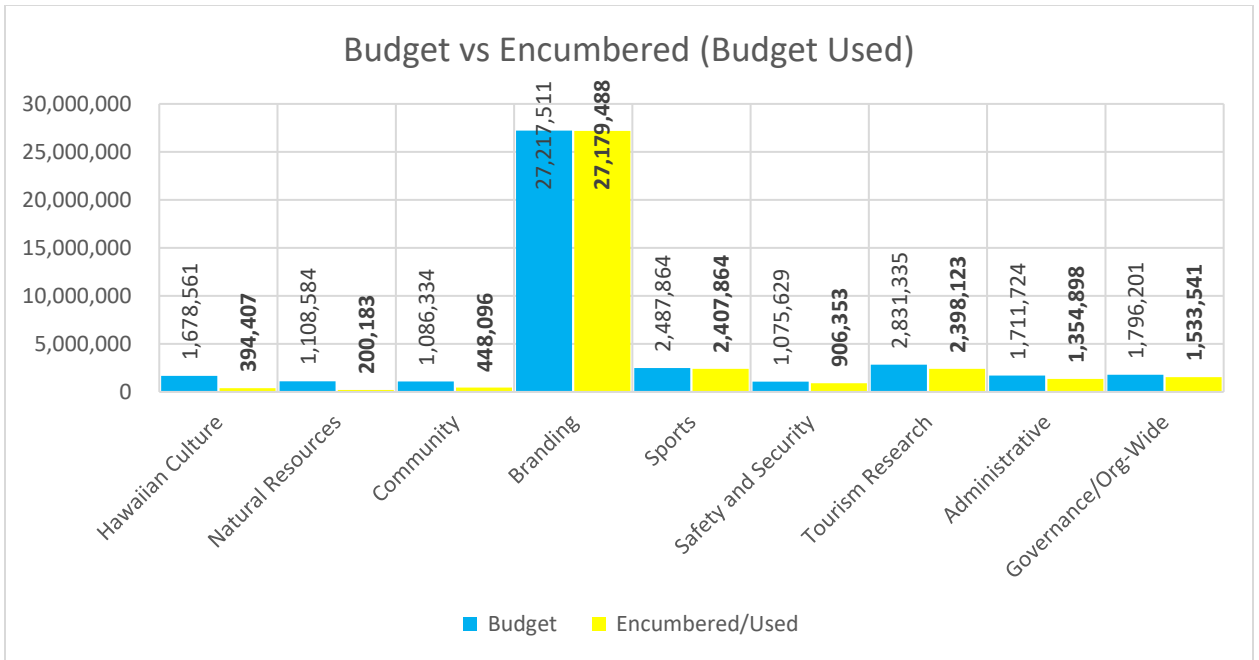
Staff continues to review the FY 2021 budget for savings opportunities and to assess the funding of its programs. Accordingly, this balance may change.

4. At its December 2020 meeting, the HTA Board of Directors approved an amended FY 2021 budget. The budget was reduced from \$48.7M to \$41M, funded as follows:

Prior Year Carryover	40,959,781
CARES Funding for VASH Flight Assistance Program	33,962
FY 2021 Budget	40,993,743

5. \$36.8M of the \$41.0M FY 2021 budget utilized/encumbered, or 90%. The following are various charts to depict our budget, budget utilization and trends.





6. Notable budget reallocations made during March 2021 are highlighted below. A detail of the reallocations made cumulatively for the fiscal year are detailed on the accompanying Budget Reallocation Summary.
 - a. Reallocated \$50,000 from Global Marketing Shares Resources to the gohawaii.com program.

7. Operating Income (Loss):

- a. No TAT was received in March 2021.
 - i. HTA's TAT allocation was suspended due to the COVID-19 pandemic, resulting in HTA not receiving the statutorily prescribed allocation from May 2020 through March 2021.
- b. Other revenue received year-to-date is comprised of the following, which included \$118K in investment income and \$43K in refunds:

Investment	398,754
Refunds on contracts	705,507
	<u>1,104,261</u>

- c. Incurred \$20.6M in expenditures YTD.

Convention Center Enterprise Special Fund:

- 8. \$27.4M in cash
 - a. Decrease from February of \$1.3M due to recording \$1.5M in expenditures, which was partially offset by \$96K in current period HCC operating revenue, and \$52K in investment income.
- 9. \$19.3M in cash with contractor or with DAGS, for R&M projects (as of February 2021).
 - a. Includes \$2M in Emergency R&M funds
 - b. These funds are encumbered or budgeted toward specific projects such as trellis removal, house audio upgrades, cooling tower replacement, furnishings and enhancements, chiller replacement, and various equipment purchases and upgrades. Of the \$19.3M, approximately \$4.8M has been contracted (as of February 2021).
 - c. The amount takes into account \$19.4M expended on current and future projects (in-progress costs or preliminary work); includes recent costs expended on meeting room roof repairs.
- 10. \$18.5M reserved as Board allocations projected for the end of FY 2021, compared to a reserve balance of \$23.5M at the beginning of the fiscal year. This includes funds targeted to fund future repair and maintenance projects (such as kitchen wall rehabilitation, ballroom gutter and transom glass repair), large equipment purchases, convention center operating contingencies and operating capital. With HTA's TAT

allocation currently suspended, the FY 2021 Convention's Center Enterprise Special Fund budget is being funded entirely by its reserves.

11. \$403K of prior year outstanding encumbrances currently being spent down.

12. Operating Income:

a. No TAT was received in March 2021.

i. HTA's TAT allocation for the CCESF was suspended due to the COVID-19 pandemic, resulting in HTA not receiving the statutorily prescribed allocation from May 2020 through March 2021.

b. Convention Center Operations

i. \$2.1M operating loss fiscal-year-to-date per HCC financial statements (as of preliminary March 2021).

Hawaii Tourism Authority

Balance Sheet

Tourism Special Fund

As of 3/31/21

	<u>Current Year</u>
Assets	
Current Assets	
Checking	52,758,254.62
Petty Cash	<u>5,000.00</u>
Total Current Assets	<u>52,763,254.62</u>
Total Assets	<u><u>52,763,254.62</u></u>
Fund Balance	
Current year payables	
Accounts Payable	20.00
Credit Card Payable	<u>12,829.20</u>
Total Current year payables	<u>12,849.20</u>
Encumbered Funds	
FY 2015 Funds	7,851.29
FY 2016 Funds	32,434.55
FY 2017 Funds	15,706.80
FY 2018 Funds	24,658.14
FY 2019 Funds	921,607.71
FY 2020 Funds	4,697,072.82
FY 2021 Funds	<u>27,860,555.64</u>
Total Encumbered Funds	<u>33,559,886.95</u>
Unencumbered Funds	
Total Unencumbered Funds	19,190,518.47
Total Fund Balance	<u><u>52,763,254.62</u></u>

Hawaii Tourism Authority
Balance Sheet
Convention Center Enterprise Special Fund
As of 3/31/21

	Current Year
Assets	
Current Assets	
Checking	27,463,427.48
Total Current Assets	27,463,427.48
Accounts Receivable	
Accounts Receivable	323,726.13
Total Accounts Receivable	323,726.13
Total Assets	27,787,153.61
Fund Balance	
Encumbered Funds	
FY 2018 Funds	400.00
FY 2019 Funds	177,919.83
FY 2020 Funds	225,000.50
FY 2021 Funds	9,392,740.25
Total Encumbered Funds	9,796,060.58
Unencumbered Funds	
Total Unencumbered Funds	17,991,093.03
Total Fund Balance	27,787,153.61

Hawaii Tourism Authority

Balance Sheet

Emergency Trust Fund

As of 3/31/21

	<u>Current Year</u>
Assets	
Current Assets	
Investments	5,141,943.91
Total Current Assets	<u>5,141,943.91</u>
 Total Assets	 <u><u>5,141,943.91</u></u>
 Fund Balance	
Current year net assets	
	16,151.65
Total Current year net assets	<u>16,151.65</u>
Prior years	
Total Prior years	5,125,792.26
 Total Fund Balance	 <u><u>5,141,943.91</u></u>

HTA Allocations
FY 2020 and FY 2021 (Projected)

HTA Allocations:

Annual Budgets:
-\$4.1M FY 2021 HTA Tourism Special Fund
 (\$0M TAT + \$32.9M carryover + \$8.1M encumbrance cancellations processed in FY21)
-\$7.5M FY 2021 Convention Center Fund

\$5M Emergency Funds

\$5M Emergency Fund Reserve (Established by Statute as a separate fund, to be used upon declaration of a tourism emergency by the Governor; HTA requested to use in FY21)	\$0M Mandated by Board (designated for use in the event of a significant economic downturn upon Board approval; used to fund FY 21 budget in response to COVID-19)
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	Tourism Special Fund Long-Term Obligations, Commitments and Allocations:		Convention Center Fund Long-Term Obligations, Commitments and Obligations:	
	6/30/2020	Projected 6/30/2021	6/30/2020	Projected 6/30/2021
Carryover of FY 2020 to FY 2021 Budget (Use in FY 21)	32,959,009	10,728,084		
Carryover Available for FY 2022 Budget	-	-	2,586,817	2,586,817
FY21 Interest, Refunds and Other Income	-	1,104,260	20,862,308	15,915,761
Center for Hawaiian Music & Dance	6,198,568	5,948,568		
Accrued Health Liability	-	-		
Accrued Retirement Liability	-	-		
Accrued Vacation Liability	325,000	325,000	80,000	80,000
Total Long-Term Obligations and Commitments	<u>39,482,577</u>	<u>18,105,912</u>	<u>23,529,125</u>	<u>18,582,578</u>

TOTAL RESERVES (incl \$5M Emergency Fund) 44,482,577 23,105,912

23,529,125 18,582,578

Hawaii Tourism Authority
Statement of Revenues and Expenditures
348 - Tourism Special Fund
21 - FY 2021 Funds
From 3/1/2021 Through 3/31/2021

	<u>Total Budget</u>	<u>Current Period Actual</u>	<u>Current Year Actual</u>	<u>Total Budget Variance</u>
Revenue				
Refunds	0.00	43,439.00	705,506.84	705,506.84
Total Revenue	<u>0.00</u>	<u>43,439.00</u>	<u>705,506.84</u>	<u>705,506.84</u>
Expense				
Perpetuating Hawaiian Culture	1,678,561.00	54,079.22	158,711.81	1,519,849.19
Natural Resources	1,108,584.00	7,161.17	106,479.03	1,002,104.97
Community	1,086,334.00	79,612.27	294,703.15	791,630.85
Branding	27,217,511.00	3,511,407.90	3,927,167.61	23,290,343.39
Sports	2,487,864.00	0.00	1,873,431.00	614,433.00
Safety and Security	1,075,629.00	42,559.09	391,378.21	684,250.79
Tourism Research	2,831,335.00	101,007.55	569,178.66	2,262,156.34
Administrative	1,706,724.00	241,194.07	773,574.02	933,149.98
Governance and Organization-Wide	1,796,201.00	261,620.11	833,276.62	962,924.38
Total Expense	<u>40,988,743.00</u>	<u>4,298,641.38</u>	<u>8,927,900.11</u>	<u>32,060,842.89</u>
Net Income	<u>(40,988,743.00)</u>	<u>(4,255,202.38)</u>	<u>(8,222,393.27)</u>	<u>32,766,349.73</u>

Hawaii Tourism Authority
Statement of Revenues and Expenditures
361 - Convention Center Enterprise Special Fund
21 - FY 2021 Funds
From 3/1/2021 Through 3/31/2021

	<u>Total Budget</u>	<u>Current Period Actual</u>	<u>Current Year Actual</u>	<u>Total Budget Variance</u>
Revenue				
HCC Revenue	4,188,144.00	419,317.46	3,508,683.33	(679,460.67)
Total Revenue	<u>4,188,144.00</u>	<u>419,317.46</u>	<u>3,508,683.33</u>	<u>(679,460.67)</u>
Expense				
Branding	70,000.00	16,693.83	53,246.28	16,753.72
Administrative	255,700.00	51,747.65	158,147.54	97,552.46
HCC Operating Expense	7,519,257.00	1,219,182.55	1,219,182.55	6,300,074.45
HCC Repair and Maintenance	2,000,000.00	0.00	0.00	2,000,000.00
HCC Sales and Marketing / MFF	1,356,157.00	0.00	608,625.00	747,532.00
Governance and Organization-Wide	529,420.00	183,701.04	230,779.38	298,640.62
Total Expense	<u>11,730,534.00</u>	<u>1,471,325.07</u>	<u>2,269,980.75</u>	<u>9,460,553.25</u>
Net Income	<u>(7,542,390.00)</u>	<u>(1,052,007.61)</u>	<u>1,238,702.58</u>	<u>8,781,092.58</u>

Hawaii Tourism Authority
Statement of Revenues and Expenditures
348 - Tourism Special Fund **Prior Years**
From 3/1/2021 Through 3/31/2021

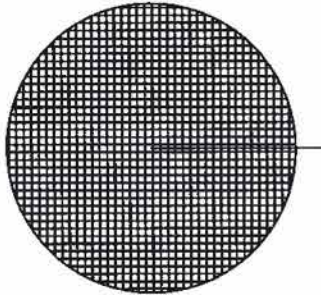
	<u>Total Budget</u>	<u>Current Period Actual</u>	<u>Current Year Actual</u>	<u>Total Budget Variance</u>
Revenue				
Interest and Dividends	0.00	118,887.83	398,753.70	398,753.70
Total Revenue	<u>0.00</u>	<u>118,887.83</u>	<u>398,753.70</u>	<u>398,753.70</u>
Expense				
Perpetuating Hawaiian Culture	2,673,431.42	373,595.87	1,299,724.48	1,373,706.94
Natural Resources	1,282,200.00	29,740.00	1,020,782.43	261,417.57
Community	2,381,173.21	42,810.00	544,067.86	1,837,105.35
Branding	21,213,138.80	1,198,595.70	6,534,836.85	14,678,301.95
Sports	434,671.22	206,878.00	266,733.00	167,938.22
Safety and Security	1,433,403.12	59,500.00	740,214.05	693,189.07
Tourism Research	2,709,523.93	270,641.09	1,037,697.74	1,671,826.19
Administrative	605,544.63	27,159.84	206,606.51	398,938.12
Governance and Organization-Wide	63,171.50	0.00	55,215.88	7,955.62
Total Expense	<u>32,796,257.83</u>	<u>2,208,920.50</u>	<u>11,705,878.80</u>	<u>21,090,379.03</u>
Net Income	<u>(32,796,257.83)</u>	<u>(2,090,032.67)</u>	<u>(11,307,125.10)</u>	<u>21,489,132.73</u>

Hawaii Tourism Authority
Statement of Revenues and Expenditures
361 - Convention Center Enterprise Special Fund **Prior Years**
From 3/1/2021 Through 3/31/2021

	<u>Total Budget</u>	<u>Current Period Actual</u>	<u>Current Year Actual</u>	<u>Total Budget Variance</u>
Revenue				
Interest and Dividends	0.00	52,417.54	178,642.63	178,642.63
HCC Revenue	<u>0.00</u>	<u>0.00</u>	<u>1,272,207.00</u>	<u>1,272,207.00</u>
Total Revenue	<u>0.00</u>	<u>52,417.54</u>	<u>1,450,849.63</u>	<u>1,450,849.63</u>
Expense				
HCC Operating Expense	1,736,916.67	0.00	1,433,517.00	303,399.67
HCC Sales and Marketing / MFF	1,245,908.83	0.00	0.00	1,245,908.83
Governance and Organization-Wide	51,917.03	0.00	32,750.00	19,167.03
Total Expense	<u>3,034,742.53</u>	<u>0.00</u>	<u>1,466,267.00</u>	<u>1,568,475.53</u>
Net Income	<u>(3,034,742.53)</u>	<u>52,417.54</u>	<u>(15,417.37)</u>	<u>3,019,325.16</u>

Summary Of Investments

Investment Allocation



0.0%	CASH	112.13
100.0%	CASH EQUIVALENTS	5,141,831.78
100.0%	TOTAL	5,141,943.91

Investment Summary

	Market Value	%	Estimated Income	Current Yield
CASH	112.13	0.00	0	0.00
CASH EQUIVALENTS	5,141,831.78	100.00	1,543	0.03
Total Fund	5,141,943.91	100.00	1,543	0.03

Schedule Of Investments

UNITS	DESCRIPTION	BOOK VALUE	MARKET VALUE	% OF CATEGORY
	CASH	112.13	112.13	100.00
	CASH EQUIVALENTS			
	CASH MANAGEMENT			
5,141,831.78	DREYFUS TREASURY OBLIGATIONS CASH MANAGEMENT FUND	5,141,831.78	5,141,831.78	100.00
	Total Fund	5,141,943.91*	5,141,943.91*	100.00*

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Hawaii Convention Center
Facility
Income Statement
From 3/01/2021 Through 3/31/2021
(In Whole Numbers)

	Current Month Actual	Current Month Budget	Variance	Current Month Prior Year	YTD Actual	YTD Budget	Variance	YTD Prior Year
Direct Event Income								
Rental Income (Net)	160,397	130,000	30,397	56,480	400,680	398,649	2,031	605,956
Service Revenue	128,346	81,039	47,307	21,517	388,067	244,346	143,721	243,045
Total Direct Event Income	288,742	211,039	77,703	77,997	788,747	642,995	145,752	849,001
Direct Service Expenses	122,861	119,948	(2,913)	54,203	357,953	364,394	6,441	418,458
Net Direct Event Income	165,881	91,091	74,790	23,794	430,794	278,601	152,193	430,542
Ancillary Income								
Food and Beverage (Net)	4,716	0	4,716	104,670	12,028	6,565	5,463	1,015,309
Event Parking (Net)	0	0	0	11,074	0	1,125	(1,125)	179,049
Electrical Services	0	0	0	0	0	0	0	33,001
Audio Visual	87	0	87	12,033	464	2,900	(2,437)	43,633
Internet Services	0	0	0	0	0	0	0	0
Printing Services	0	0	0	0	0	200	(200)	22,502
First Aid Commissions	0	0	0	0	0	0	0	0
Total Ancillary Income	4,803	0	4,803	127,777	12,492	10,790	1,702	1,293,494
Total Event Income	170,684	91,091	79,593	151,571	443,286	289,391	153,895	1,724,037
Other Operating Income								
Non-Event Parking	0	0	0	3,015	0	0	0	12,591
Other Income	913	1,417	(504)	5,375	2,952	4,251	(1,299)	33,893
Total Other Operating Income	913	1,417	(504)	8,390	2,952	4,251	(1,299)	46,484
Total Gross Income	171,597	92,508	79,089	159,961	446,238	293,642	152,597	1,770,521
Net Salaries & Benefits								
Salaries & Wages	250,021	268,050	18,029	355,520	724,358	804,150	79,792	1,184,314
Payroll Taxes & Benefits	209,388	92,842	(116,546)	140,125	357,636	278,526	(79,110)	344,804
Labor Allocations to Events	(112,664)	(115,573)	(2,909)	(17,249)	(337,907)	(350,819)	(12,912)	(130,730)
Total Net Salaries & Benefits	346,745	245,319	(101,426)	478,396	744,087	731,857	(12,230)	1,398,388
Other Indirect Expenses								
Net Contracted Services	14,825	24,816	9,991	13,956	34,006	73,648	39,642	70,967
Operations	7,359	7,584	225	10,546	29,555	22,752	(6,803)	41,006
Repair & Maintenance	39,188	64,384	25,196	48,768	147,880	193,152	45,272	168,842
Operational Supplies	5,359	18,642	13,283	26,375	12,554	56,172	43,618	135,118
Insurance	8,393	8,308	(85)	10,592	28,634	25,012	(3,622)	39,199
Utilities	128,376	127,409	(967)	153,666	344,404	389,371	44,967	490,725
Meetings & Conventions	0	725	725	798	3,375	2,175	(1,200)	4,493
Promotions & Communications	630	2,300	1,670	2,413	(1,464)	6,900	8,364	14,891
General & Administrative	3,678	11,743	8,065	36,223	15,532	35,386	19,854	70,311
Management Fees	0	18,633	18,633	17,734	0	55,899	55,899	54,709
Other	46,411	2,166	(44,245)	133,962	73,363	6,498	(66,865)	149,729
Total Other Indirect	254,219	286,710	32,491	455,032	687,839	866,965	179,126	1,239,989
Net Income (Loss) before CIP Funded Expenses	(429,367)	(439,521)	10,154	(773,467)	(985,688)	(1,305,180)	319,492	(867,857)
CIP Funded Expenses	45,206	0	45,206	133,123	71,758	0	71,758	148,491
Net Income (Loss) from Operations	(384,160)	(439,521)	55,361	(640,344)	(913,930)	(1,305,180)	391,250	(719,366)
Fixed Asset Purchases	1,564	4,167	2,603	(1,125)	2,576	12,501	9,925	34,703
Net Income (Loss) After Fixed Asset Purchases	(385,724)	(443,688)	57,964	(639,219)	(916,506)	(1,317,681)	401,175	(754,069)

Hawaii Convention Center
 Facility
 Income Statement
 From 3/01/2021 Through 3/31/2021
 (In Whole Numbers)

	Current Month Actual	Current Month Budget	Variance	Current Month Prior Year	YTD Actual	YTD Budget	Variance	YTD Prior Year
Revenues								
Food & Beverage	6,263	0	6,263	201,367	16,594	11,070	5,524	1,825,299
Facility	289,742	212,456	77,286	113,458	792,163	651,846	140,317	1,197,815
Total Revenues	296,005	212,456	83,549	314,825	808,757	662,916	145,841	3,023,113
Expenses								
Food & Beverage	29,380	45,985	16,605	177,777	86,821	142,826	56,005	1,199,056
Facility	695,992	605,992	(90,000)	910,515	1,707,624	1,825,270	117,646	2,691,913
Total Expenses	725,371	651,977	(73,394)	1,088,292	1,794,445	1,968,096	173,652	3,890,970
Net Income (Loss) before CIP Funded Expenses	(429,367)	(439,521)	10,154	(773,467)	(985,688)	(1,305,180)	319,492	(867,857)
CIP Funded Expenses	45,206	0	45,206	133,123	71,758	0	71,758	148,491
Net Income (Loss) from Operations	(384,161)	(439,521)	55,360	(640,344)	(913,930)	(1,305,180)	391,250	(719,366)
Fixed Asset Purchases	1,564	4,167	2,603	(1,125)	2,576	12,501	9,925	34,703
Net Income (Loss) after Fixed Asset Purchases	(385,725)	(443,688)	57,963	(639,219)	(916,506)	(1,317,681)	401,175	(754,069)

Hawaii Convention Center
Sales and Marketing
Income Statement
From 3/1/2021 Through 3/31/2021
(In Whole Numbers)

	Current Month Actual	Current Month Budget	Variance	Current Month Prior Year	YTD Actual	YTD Budget	Variance	YTD Prior Year
Other Operating Income								
Other Income	0	0	0	38	0	0	0	228
Total Other Operating Income	0	0	0	38	0	0	0	228
Total Gross Income	0	0	0	38	0	0	0	228
Net Salaries & Benefits								
Salaries & Wages	17,901	22,108	4,207	49,594	52,310	66,324	14,014	138,982
Payroll Taxes & Benefits	4,716	6,850	2,134	15,134	14,319	20,550	6,231	27,755
Total Net Salaries & Benefits	22,618	28,958	6,340	64,728	66,629	86,874	20,245	166,737
Other Indirect Expenses								
Net Contracted Services	0	0	0	0	0	0	0	0
Repair & Maintenance	5,320	5,517	197	10,609	15,959	16,551	592	16,927
Utilities	253	300	47	309	759	900	141	1,242
Meetings & Conventions								
Mileage	0	0	0	0	0	0	0	0
Meals & Entertainment	0	208	208	60	0	624	624	326
Meetings & Conventions	0	0	0	0	(694)	0	694	237
Dues & Subscriptions	0	83	83	0	755	249	(506)	270
Total Meetings & Conventions	0	291	291	60	61	873	812	833
Promotions & Communications								
Site Visit	0	0	0	0	0	0	0	2,000
Photography	0	0	0	0	0	0	0	79
Advertising	0	1,667	1,667	0	0	5,001	5,001	0
Web Development & Maint	1,667	3,725	2,058	3,612	3,923	11,175	7,252	8,684
Market Research	0	0	0	0	0	0	0	0
Promotional	0	250	250	260	0	750	750	(1,264)
Attendance Promotion	0	0	0	0	0	0	0	0
Global Outreach	0	0	0	0	0	0	0	0
Total Promotions & Comm	1,667	5,642	3,975	3,873	3,923	16,926	13,003	9,498
Marketing Flexibility Fund	0	0	0	0	0	0	0	0
General & Administrative	352	708	356	149	708	2,124	1,416	804
Management Fees	0	0	0	0	0	0	0	0
Other	1,047	1,266	219	2,094	3,141	3,798	657	6,283
Total Other Indirect Expenses	8,639	13,724	5,085	17,094	24,552	41,172	16,620	35,587
Net Income (Loss) from Operations	(31,257)	(42,682)	11,425	(81,784)	(91,181)	(128,046)	36,865	(202,096)
Fixed Asset Purchases	0	0	0	0	0	0	0	0
Net Income (Loss) After Fixed Asset Purchases	(31,257)	(42,682)	11,425	(81,784)	(91,181)	(128,046)	36,865	(202,096)

Budget Reallocation Summary
 FY 2021
 Through March 31, 2021

Budget Line Item	Program Code	Amended Budget (December 2020)	Year-to-Date		March 2021 Activity
			Reallocation	Budget After Reallocations	
Perpetuating Hawaiian Culture					
<i>From:</i>					
Hawaiian Culture Opportunity Fund	215	250,000	(300)	249,700	
				-	
				-	
			(300)		-
<i>To:</i>					
Memberships and Dues - Hawaiian Culture	297	-	300	300	
				-	
				-	
				-	
				-	
			300		-
Natural Resources					
<i>From:</i>					
State Employee Salaries - Natural Resources	936	64,959	(39,375)	25,584	
Visitor Impact Program	406	1,000,000	(91,000)	909,000	
				-	
				-	
			(130,375)		-
<i>To:</i>					
In-House Contracted Staff - Natural Resources	499	20,000	63,000	83,000	
Aloha Aina	402	-	91,000	91,000	
				-	
				-	
			154,000		-
Community					
<i>From:</i>					
				-	
				-	
				-	
			-		-
<i>To:</i>					
				-	
				-	
				-	
				-	

Budget Reallocation Summary
 FY 2021
 Through March 31, 2021

Budget Line Item	Program Code	Amended Budget (December 2020)	Reallocation	Budget After Reallocations	March 2021 Activity
			-	-	
			-	-	
			-	-	
			-		-
Branding					
<i>From:</i>					
Travel - Branding	398	10,000	(400)	9,600	
Global Marketing Shared Resources	350	787,000	(50,000)	737,000	(50,000)
				-	
			(50,400)		(50,000)
<i>To:</i>					
Marketing Opportunity Fund	380	-	400	400	
gohawaii.com	318	300,000	50,000	350,000	50,000
				-	
			50,400		50,000
Sports					
<i>From:</i>					
Polynesian Football Hall of Fame	377	155,000	(105,000)	50,000	
				-	
				-	
			(105,000)		-
<i>To:</i>					
Football (Hula Bowl)	384	-	25,000	25,000	
Sports Programs - Unallocated	379	-	80,000	80,000	
				-	
				-	
			105,000		-
Safety and Security					
<i>From:</i>					
None				-	
				-	
			-		-
<i>To:</i>					
				-	
				-	
			-		-
Tourism Research					
<i>From:</i>					
Visitor Arrivals and Departure Surveys	512	1,150,581	(172,890)	977,691	
				-	
				-	
			(172,890)		-
<i>To:</i>					

Budget Reallocation Summary
 FY 2021
 Through March 31, 2021

Budget Line Item	Program Code	Amended Budget (December 2020)	Reallocation	Budget After Reallocations	March 2021 Activity
Evaluation and Performance Studies	513	662,810	46,000	708,810	
Marketing Research	514	42,850	126,890	169,740	
			172,890	-	-
Administration					
<i>From:</i>					
			-	-	-
<i>To:</i>					
			-	-	-
Governance and Organization-Wide					
<i>From:</i>					
State Employees Fringe	931	1,535,226	(23,625)	1,511,601	
Organization-Wide	915	195,000	(6,000)	189,000	(6,000)
			(29,625)	-	(6,000)
<i>To:</i>					
Governance - Gen Board/Others	919	89,600	6,000	95,600	6,000
			6,000	-	6,000
Board Allocations					
<i>From:</i>					
None			-	-	-
			-	-	-

Note: At its December 17, 2020 meeting, the HTA Board approved an amended FY21 budget. This schedule captures reallocations made after the amended budget.

Hawaii Tourism Authority
 Budget Statement - Summary
 FY 2021
 As of March 31, 2021

Category	Tourism Special Fund				Convention Center Enterprise Special Fund			
	Budget	YTD Amount of Budget Used	Balance	Activity for March 2021	Budget	YTD Amount of Budget Used	Balance	Activity for March 2021
Revenues								
TAT Revenue Allocation	-	-	-	-	-	-	-	-
Prior Year Carryover	40,959,781	-	40,959,781	-	7,542,390	-	7,542,390	-
Availability of \$5M Emergency Fund (Subject to Governor Approval)	-	-	-	-	-	-	-	-
Other	33,962	1,104,261	(1,070,299)	162,327	-	1,450,850	(1,450,850)	52,418
	<u>40,993,743</u>	<u>1,104,261</u>	<u>39,889,482</u>	<u>162,327</u>	<u>7,542,390</u>	<u>1,450,850</u>	<u>6,091,540</u>	<u>52,418</u>
Expenditures								
Perpetuating Hawaiian Culture								
Hawaiian Culture Programs	1,450,000	177,267	1,272,733	151,063	-	-	-	-
In-House Contracted Staff - Hawaiian Culture	-	-	-	-	-	-	-	-
State Employee Salaries - Hawaiian Culture	228,561	217,140	11,421	-	-	-	-	-
Subtotal	<u>1,678,561</u>	<u>394,407</u>	<u>1,284,154</u>	<u>151,063</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Natural Resources (Statute: \$1M minimum)								
Natural Resources Programs	1,000,000	91,599	908,401	-	-	-	-	-
In-House Contracted Staff - Natural Resources	83,000	83,000	-	-	-	-	-	-
State Employee Salaries - Natural Resources	25,584	25,584	-	-	-	-	-	-
Subtotal	<u>1,108,584</u>	<u>200,183</u>	<u>908,401</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Community								
Community Programs	931,500	300,976	630,524	15,936	-	-	-	-
In-House Contracted Staff - Community	-	-	-	-	-	-	-	-
State Employee Salaries - Community	154,834	147,120	7,714	-	-	-	-	-
Subtotal	<u>1,086,334</u>	<u>448,096</u>	<u>638,238</u>	<u>15,936</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Branding								
Branding Programs	26,682,500	26,670,840	11,660	-	-	-	-	-
In-House Contracted Staff - Branding	-	-	-	-	-	-	-	-
State Employee Salaries - Branding	535,011	508,648	26,363	-	70,000	70,000	-	-
Subtotal	<u>27,217,511</u>	<u>27,179,488</u>	<u>38,023</u>	<u>-</u>	<u>70,000</u>	<u>70,000</u>	<u>-</u>	<u>-</u>
Sports								
Sports Programs	2,487,864	2,407,864	80,000	-	-	-	-	-
Subtotal	<u>2,487,864</u>	<u>2,407,864</u>	<u>80,000</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Safety and Security								
Safety and Security Programs	1,075,629	906,353	169,276	10,265	-	-	-	-
Subtotal	<u>1,075,629</u>	<u>906,353</u>	<u>169,276</u>	<u>10,265</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Tourism Research								
Tourism Research Programs	2,422,942	2,013,943	408,999	131	-	-	-	-
In-House Contracted Staff - Tourism Research	-	-	-	-	-	-	-	-
State Employee Salaries - Tourism Research	408,393	384,180	24,213	-	-	-	-	-
Subtotal	<u>2,831,335</u>	<u>2,398,123</u>	<u>433,212</u>	<u>131</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Hawai'i Convention Center								
Sales & Marketing	-	-	-	-	1,356,157	1,356,157	-	-
Operations	-	-	-	-	3,331,113	4,124,474	(793,361)	(419,317)
Major Repair & Maintenance	-	-	-	-	2,000,000	2,000,000	-	-
Subtotal	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>6,687,270</u>	<u>7,480,631</u>	<u>(793,361)</u>	<u>(419,317)</u>
Administrative (Statute: Cannot exceed 3.5% = \$2,765,000)								
Operations	608,700	307,671	301,029	612	-	-	-	-
In-House Contracted Staff - Admin	-	-	-	-	-	-	-	-
State Employee Salaries - Admin	1,103,024	1,047,227	55,797	-	255,700	255,700	-	-
Subtotal	<u>1,711,724</u>	<u>1,354,898</u>	<u>356,826</u>	<u>612</u>	<u>255,700</u>	<u>255,700</u>	<u>-</u>	<u>-</u>
Organizationwide Costs								
State Employee Fringe	1,511,601	1,336,465	175,136	-	189,420	189,420	-	-
Organization-Wide	189,000	105,000	84,000	-	340,000	158,287	181,713	-
Governance - Board/Others	95,600	92,076	3,524	18,430	-	-	-	-
Subtotal	<u>1,796,201</u>	<u>1,533,541</u>	<u>262,660</u>	<u>18,430</u>	<u>529,420</u>	<u>347,707</u>	<u>181,713</u>	<u>-</u>
Total Expenditures	<u>40,993,743</u>	<u>36,822,953</u>	<u>4,170,790</u>	<u>196,437</u>	<u>7,542,390</u>	<u>8,154,038</u>	<u>(611,648)</u>	<u>(419,317)</u>
Revenues vs Expenditures	<u>-</u>	<u>(35,718,692)</u>			<u>-</u>	<u>(6,703,188)</u>		
Administrative Cap (3.5%, HRS 201B-11)	2,765,000	2,765,000						
HTA's Budgeted/Actual Administrative Costs (applying AG Definition)	<u>1,711,724</u>	<u>1,354,898</u>	2.2%	1.7%				
	1,053,276	1,410,102						

Hawaii Tourism Authority
Budget Statement
March 31, 2021

Program Code	Program Title	Budget - FY21	Encumbered (Budget Used) - FY21	Budget Remaining	March 2021 Activity
Perpetuating Hawaiian Culture					
201	Kukulu Ola: Living Hawaiian Cultural Prog	-	-	-	-
202	Hawaiian Culture Initiative	500,000	5,529	494,471	-
203	Ma'ema'e HTA	-	-	-	-
204	Market Support	-	-	-	-
208	Hawaiian Music and Dance Center	250,000	-	250,000	-
212	Merrie Monarch Hula Festival	100,000	100,000	-	100,000
215	Hawaiian Culture Opportunity Fund	249,700	71,438	178,262	51,063
216	Olelo Hawaii	250,000	-	250,000	-
217	FESTPAC	50,000	-	50,000	-
297	Memberships and Dues - Hawaiian Culture	300	300	-	-
299	In-House Contracted Staff - Hawaiian Culture	-	-	-	-
374	Surfing	50,000	-	50,000	-
932	Salaries - Hawaiian Culture	228,561	217,140	11,421	-
	Perpetuating Hawaiian Culture	1,678,561	394,407	1,284,154	151,063
Natural Resources					
402	Aloha Aina (formerly NR and Leg Prov NR)	91,000	91,000	-	-
406	Visitor Impact Program	909,000	599	908,401	-
499	In-House Contracted Staff - Natural Resources	83,000	83,000	-	-
936	State Employee Salaries - Natural Resources	25,584	25,584	-	-
	Natural Resources	1,108,584	200,183	908,401	-
Community					
731	Community-Based Tourism - Oahu	81,000	80,929	71	-
732	Community-Based Tourism - Maui County	350,000	127,029	222,971	8,800
733	Community-Based Tourism - Hawaii Island	250,000	53,544	196,456	7,136
734	Community-Based Tourism - Kauai	250,000	39,475	210,525	-
797	Memberships and Dues - Community	500	-	500	-
798	Travel - Community	-	-	-	-
933	State Employee Salaries - Community	154,834	147,120	7,714	-
	Community	1,086,334	448,096	638,238	15,936
Branding					
4	Cruise Infrastructure Improvements and Arrival Experience	50,000	50,000	-	-
318	gohawaii.com (formerly Online Website Coordination)	350,000	350,000	-	50,000
320	Island Chapters Staffing and Admin	2,400,000	2,400,000	-	-
321	US (formerly North America)	14,605,000	14,605,000	-	-
322	Canada	400,000	400,000	-	-
323	Japan	4,500,000	4,500,000	-	-
324	Korea	300,000	300,000	-	-
325	Oceania	400,000	400,000	-	-
331	Meetings, Convention & Incentives	2,395,000	2,395,000	-	-
339	Global Digital Marketing Strategy (former Intl Online Strat)	380,500	380,500	-	-
350	Global Mkt Shared Resces (formerly Intellect Prop Data Bank)	737,000	737,000	-	(50,000)
380	Marketing Opportunity Fund	400	340	60	-
397	Memberships and Dues - Branding	125,000	123,000	2,000	-
398	Travel - Branding	9,600	-	9,600	-
723	Hawaii Film Office Partnership	30,000	30,000	-	-
934	State Employee Salaries - Branding	535,011	508,648	26,363	-
	Branding	27,217,511	27,179,488	38,023	-
Sports					
312	PGA Tour Contracts	2,166,864	2,166,864	-	-
377	Polynesian Football HoF	50,000	50,000	-	-
378	UH Athletics Branding Partnership	166,000	166,000	-	-
379	Sports Programs - Unallocated	80,000	-	80,000	-
384	Football	25,000	25,000	-	-
	Sports	2,487,864	2,407,864	80,000	-
Safety and Security					
601	Visitor Assistance Programs	650,000	487,500	162,500	-
602	Crisis Management	425,629	418,853	6,776	10,265
	Safety and Security	1,075,629	906,353	169,276	10,265
Tourism Research					
505	Est of Visitor Arrivals by Country by Month	3,500	3,500	-	-
506	Infrastructure Research (Accomodations and Airseats)	520,879	464,847	56,032	131
512	Visitor Arrivals and Departure Surveys	977,691	662,855	314,836	-
513	Evaluation and Performance Studies	708,810	708,173	637	-
514	Marketing Research	169,740	169,740	-	-
597	Memberships and Dues - Research	42,322	4,829	37,493	-
935	State Employee Salaries - Research	408,393	384,180	24,213	-
	Tourism Research	2,831,335	2,398,123	433,212	131
Administrative					
101	Community-Industry Outreach & Public Relations Svcs	265,000	145,000	120,000	-
103	hawaiiauthority.org (formerly HTA web/Global Social)	50,000	35,959	14,041	-
901	General and Administrative	288,700	126,176	162,524	612
909	Protocol Fund	5,000	536	4,464	-
930	State Employee Salaries - Admin	1,103,024	1,047,227	55,797	-
998	Travel - Admin	-	-	-	-
	Administrative	1,711,724	1,354,898	356,826	612
Governance and Organization-Wide					
915	Organization-Wide	189,000	105,000	84,000	-
919	Governance - Gen Board/Others	95,600	92,076	3,524	18,429
931	State Employees Fringe	1,511,601	1,336,465	175,136	-
	Governance and Organization-Wide	1,796,201	1,533,541	262,660	18,429
Total	FY21 Funds	40,993,743	36,822,953	4,170,790	196,437
Convention Center Enterprise Special Fund					
Branding					
934	State Employee Salaries - Branding	70,000	70,000	-	-
	Branding	70,000	70,000	-	-

Hawaii Tourism Authority
Budget Statement
March 31, 2021

Program Code	Program Title	Budget - FY21	Encumbered (Budget Used) - FY21	Budget Remaining	March 2021 Activity
Administrative					
930	State Employee Salaries - Admin	255,700	255,700	-	-
	Administrative	255,700	255,700	-	-
HCC Operations					
850	HCC Operating Expense	7,519,257	7,633,157	(113,900)	-
860	HCC Repair and Maintenance	2,000,000	2,000,000	-	-
870	HCC Sales and Marketing / MFF	875,625	875,625	-	-
871	HCC Local Sales	480,532	480,532	-	-
	HCC Operations	10,875,414	10,989,314	(113,900)	-
Governance and Organization-Wide					
915	Organization-Wide	340,000	158,287	181,713	-
931	State Employees Fringe	189,420	189,420	-	-
	Governance and Organization-Wide	529,420	347,707	181,713	-
Total	FY21 Funds	11,730,534	11,662,721	67,813	-