



*KA HĀLĀWAI KŪMAU A KE KŌMIKE ALOWELO
KE'ENA KULEANA HO'OKIPA O HAWAII'*

**BRANDING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY**

Po'akolu, 26 'Apelila, 2023, 2:00 p.m.
Wednesday, April 26, 2023 at 2:00 p.m.

Hālāwai Keleka'a'ike
VIRTUAL MEETING

Hiki i ka lehulehu ke hālāwai pū ma o ka ZOOM.

Webinar will be live streaming via ZOOM.

<https://us06web.zoom.us/j/85042227521>

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

*Hiki nō ke ho'opihapiha penei, *****@****mail.com*

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

*****@***mail.com.

Hiki i ka lehulehu e komo ana ma ka hālāwai ma o ka Zoom ke hō'ike mai i nā 'ōlelo hō'ike ma o ka māhele nīnau a pane o ka Zoom.

Members of the public attending via Zoom may provide testimony through the question and answer feature of the Zoom platform.

Papa Kumumana'o
AGENDA

1. *Ho'omaka a Wehena*
Call to Order and Opening Protocol
2. *E Mālama 'ia ana ke Kikolā e Kāhea ai nā Lālā Papa Alaka'i Komo a e Hō'oiā ai nā Kānaka 'Ē A'e e Komo Pū ana me ka Lālā Papa Alaka'i inā aia ma Kahi Ka'awale*
Roll Call to Announce Name of Participating Board Members and to Identify Who Else is Present with Board Member if Location is Nonpublic



3. *Āpono i ka Mo'olelo o ka Hālāwai 29 Malaki, 2023 a ke Kōmike Alowelo Kūmau*
Approval of Minutes of the March 29, 2023 Branding Standing Committee Meeting
4. *Hō'ike'ike, Kūkā, a Hana e Hāpai 'ia ai ka 'Āpono 'ia o ka Hawai'i Tourism USA Brand Marketing Plan ('Apelila - Iune 2023)*
Presentation, Discussion, and Action on Hawai'i Tourism USA's Brand Marketing Plan (April – June 2023)
5. *Hō'ike'ike a Kūkā no ka 'Oihana Mokulele i Hawai'i*
Presentation and Discussion on Air Service to Hawai'i
6. *Mo'olelo no ka RFP 23-02 no ka Hawai'i Tourism Destination Brand Management & Marketing Services for the Canada Major Market*
Update on RFP 23-02 Hawai'i Tourism Destination Brand Management & Marketing Services for the Canada Major Market
7. *Mo'olelo no ka RFP 23-03 Hawai'i Tourism Destination Brand Management & Marketing Services for the United States Market*
Update on RFP 23-03 Hawai'i Tourism Destination Brand Management & Marketing Services for the United States Market
8. *Ho'oku'u*
Adjournment

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

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



Kono 'ia ka lehulehu e nānā mai i ka hālāwai a ho'ouna mai i ka 'ōlelo hō'ike kākau 'ia no kēlā me kēia kumuhana i helu 'ia ma ka papa kumumana'o. Hiki ke ho'ouna mai i nā 'ōlelo hō'ike kākau 'ia ma mua o ka hālāwai iā carole@gohta.net a i 'ole ho'ouna i ka leka i ke Ke'ena Kuleana Ho'okipa O Hawai'i, 1801 Kalakaua Avenue, Honolulu, HI 96815 - Attn: Carole Hagihara-Loo. Inā he lawelawe a mea like paha e pono ai ke kīnānā, e ho'oka'a'ike aku me Carole Hagihara-Loo ma (808)-973-2289 a ma ka leka uila: carole@gohta.net e like me ka wikiwiki i hiki, 'a'ole ho'i a ma 'ō aku o ka 'ekolu lā ma mua o ka hālāwai. Inā 'ike 'ia he noi i ka lā ma mua o ka hālāwai, e ho'ā'o mākou e 'imi i ka lawelawe a mea like paha, 'a'ole na'e ho'i e hiki ke ho'ohiki 'ia ke kō o ua noi lā.

Ua noa pū kēia ho'olaha ma nā kino 'oko'a e la'a ke kope pa'i nui, Braille, a kope uila pū ma ke noi.

Members of the public are invited to view the public meeting and provide written testimony on any agenda item. **Written testimony may be submitted prior to the meeting to the HTA by email to carole@gohta.net or by postal mail to the Hawaii Tourism Authority, 1801 Kalakaua Avenue, Honolulu, HI 96815 - Attn: Carole Hagihara-Loo.** If you need an auxiliary aid/service or other accommodation due to a disability, contact Carole Hagihara-Loo at (808)973-2289 or by email: carole@gohta.net as soon as possible, preferably no later than 3 days prior to the meeting. If a response is received the day before the meeting, we will try to obtain the auxiliary aid/service or accommodation, but we cannot guarantee that the request will be fulfilled.

Upon request, this notice is available in alternative formats such as large print, Braille, or electronic copy.

E like nō me ka 'ōlelo o ke Kānāwai Hawai'i i ho'oholo 'ia māhele 92-32.7, e mālama ana ke Ke'ena Kuleana Ho'okipa o Hawai'i i kekahi wahi e hiki ai ka po'e o ka lehulehu ke noho a komo pū ma nā hālāwai ma o ka ho'ohana 'ana i ka 'enehana pāpaho (ICT). Aia ana kēia 'enehana pāpaho ma ka papahale mua o ka lumi ho'okipa i mua o ke Ke'ena Kuleana Ho'okipa o Hawai'i ma ka Hale 'Aha. 'O 1801 Kalakaua Avenue, Honolulu, Hawaii, 96815 ka helu wahi.

In accordance with HRS section 92-3.7, the Hawaii Tourism Authority will establish a remote viewing area for members of the public and board members to view and participate in meetings held using interactive conference technology (ICT). The ICT audiovisual connection will be located on the 1st Floor in the Lobby area fronting the Hawaii Tourism Authority at the Hawaii Convention Center at 1801 Kalakaua Avenue, Honolulu, Hawaii, 96815.

3

Approval of Minutes of the
March 29, 2023 Branding Standing
Committee Meeting



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

Josh Green, M.D.
Kia'āina Governor

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

**BRANDING STANDING
COMMITTEE MEETING
HAWAII TOURISM AUTHORITY
Wednesday, March 29, 2023, at 3:00 p.m.**

Virtual Meeting

MINUTES OF THE BRANDING STANDING COMMITTEE MEETING

MEMBERS PRESENT:	Dylan Ching (Chair), Mike White (Vice-Chair), James McCully, Sig Zane
NON-VOTING MEMBERS:	Kimberly Agas, George Kam
MEMBERS NOT PRESENT:	David Arakawa, Ben Rafter
HTA STAFF PRESENT:	Kalani Ka'anā'anā, Maka Casson-Fisher
GUESTS:	Dennis Suo
LEGAL COUNSEL:	John Cole

1. Call to Order and Opening Protocol

Mr. Casson-Fisher called the meeting to order at 3:10 p.m. and did the opening cultural protocol.

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

Mr. Casson-Fisher did the roll call. All confirmed that they were in attendance and alone. Mr. Casson-Fisher did the opening protocol.

3. Approval of Minutes of the February 15, 2023 Branding Standing Committee Meeting.

Chair. Ching asked for a motion to approve February 15, 2023, minutes. Mr. McCully made a motion, and Mr. White seconded. Mr. Casson-Fisher did the roll call, and the motion passed unanimously.

4. Presentation, Discussion, and/or Action on Hawai'i Tourism China's 2023 Budget Plan

Mr. Ka'anā'anā said they covered the agenda item at the BFCC as well. The full Board would review it in the regular Board meeting the following day. He showed an overview. \$1.8 million was the total contract amount the HTA started in 2021. They spent \$733,000 in 2022, leaving a balance of just over \$1 million. They had discussed it and received SPO approval and everything else needed to keep the contract alive and the money attached to it. The Board approved the spending and restricted it to \$87,000 from January through June 2023. The remaining balance was \$979,384 for the rest of the contract. He wanted to discuss how to spend the available funding related to the Chinese market and the contract.

He spoke about the budget details. He showed the figures approved by the Board and the total revised budget details they would like for 2023. He said some opportunities make sense for them to leverage, to their advantage, in partnership with the U.S. Embassy, which is doing most of the heavy lifting.

Mr. Ka'anā'anā spoke about the Trade Mission they want to do, which they have been unable to do for many years. They are in consultation with some of the industry partners.

He showed the breakdown for the 2024 and 2025 ask from the Board. \$376,000 is for the calendar year 2024, and \$293,284 is for the calendar year 2025. Mr. McCully asked about the increases. Mr. Ka'anā'anā said some of it was due to market shifting and the intelligence they are receiving from in-market people. Some of it has been their consultation with the Chinese Chamber of Commerce and local industry stakeholders. He said they have a China Advisor Committee that helps the HTA stay in touch with those directly in the Chinese market. He said it is the staff's recommendation based on what they see from the contractors' point of view and the fact sheets from Ms. Jennifer Chun collected monthly. Mr. McCully said those amounts are a fraction of any other market. Mr. Ka'anā'anā said they had been around the \$2 million mark for the Chinese market, but based on what he has seen, he said the current figures are reasonable and pragmatic to ensure they can continue their presence as a destination in-market doing what needs to be done. He added that when looking at the January fact sheet, they had a little over 1,100 arrivals in January 2023 from the Chinese market. For China's expenditures in January, it totaled \$3.9 million.

Their average length of stay was 8.27 days, with 70% first-timers and 30% repeat Chinese visitors.

Mr. McCully asked about the airlift update. Mr. Ka'anā'anā said there would be an airlift update at the BOD, and there is an opportunity for the HTA. He said they must keep trade secrets confidential. He said there is an ANA route between Beijing, Haneda, and Honolulu. The HTA needs to discuss this for cooperation opportunities and ensure the cooperation is patterned so that the HTA would be incentivizing or supporting the airlift from China through to Honolulu. Chair Ching asked if there were any takeaways from the BFCC regarding this. Mr. Ka'anā'anā said everything was covered at the previous days' BFCC Standing Committee meeting.

Chair Ching requested a motion to recommend this agenda item to the full Board. Mr. White made a motion, and Mr. McCully seconded. Mr. Casson-Fisher did the roll call, and the motion passed unanimously.

5. Presentation, Discussion, and Action on Proposal to Reallocate FY22 Funds from Hawaiian Culture Initiative to Marketing Opportunity Fund in the Amount of \$50,000

The BFCC meeting also recommended approval of this agenda item. Mr. Ka'anā'anā said this item is a budget reallocation that would straighten out some of the bookkeeping on how the HTA applies certain costs. They did not anticipate having to apply some of the costs related to IPW the previous year, as well as smaller events. This put them a little over their budget in the Marketing Opportunity Fund, so the \$50,000 would give them some cushioning in case something else came up. The money was coming from the 202, the Hawaiian Culture Initiative, because they received guidance from BNF that the HTA was not allowed to spend ARPA money on something they originally planned for, so they wanted to move it from 202 to 380. Chair Ching asked about the money that could not be spent with ARPA funds. He asked if that initiative is being funded some other way. Mr. Ka'anā'anā said it was specifically related to FESPAC, so FESPAC was receiving funds through another way, so it does not necessarily impact the HTA. It did free up some funding to use for other things. He said there was a total of \$250,000 for FESPAC.

There were no questions. Chair Ching asked for a motion to approve the reallocation of the funds. Mr. White made a motion, and Mr. McCully seconded. Mr. Casson-Fisher did the roll call, and the motion passed unanimously.

6. Update on RFP 23-02 Hawai'i Tourism Destination Brand Management & Marketing

Services for the Canada Major Market

Mr. Ka'anā'anā gave an update. He said the procurement was open for RFP 23-02. He spoke about the timelines. He said proposals are due on April 21 at 2 p.m. HST. He said everything is going smoothly for the procurement. Mr. White asked how many people filed a notice of intent to offer. Mr. Ka'anā'anā said he was not able to disclose that information publicly.

There were no questions. Chair Ching said there was no action necessary.

7. Update on RFP 23-03 Hawai'i Tourism Destination Brand Management & Marketing Services for the United States Market

Mr. Ka'anā'anā said the due date is March 30 at 2 p.m. HST. There was no further update. Everything is going smoothly, and deadlines are being met.

There were no questions. Chair Ching said there was no action necessary.

8. Adjournment

Mr. White made a motion to adjourn, and Mr. White seconded. The motion passed unanimously.

Mr. Casson-Fisher adjourned the meeting at 3:31 p.m.

Respectfully submitted,



Sheillane Reyes
Recorder

4

Presentation, Discussion, and Action on
Hawai'i Tourism USA's Brand Marketing Plan
(April – June 2023)



2023 HTUSA Market Update

Jay Talwar

Chief Marketing Officer, Senior Vice President

MARKET SITUATION

MARKET SITUATION

GENERAL ECONOMY

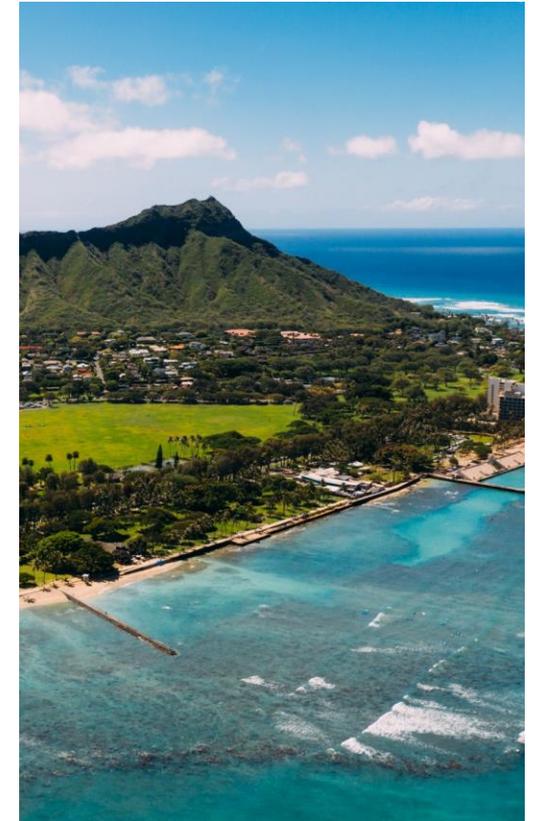


- While the U.S. economy is in a mild recession, the strong dollar and accumulated personal savings have consumers in a financial position of strength.
- Staff shortages will continue to increase labor costs and be passed on to consumers.
- The overall outlook for U.S. travel to Hawai'i remains optimistic.
- Tourism remains a significant contributor to the economy of Hawai'i.

MARKET SITUATION

OUTBOUND TRAVEL / TRAVEL SENTIMENT

- Department of Business, Economic Development and Tourism (DBEDT) forecasts a 94.5 percent recovery in 2023.
- U.S. visitation to Hawai‘i is expected to remain high and remain the primary source market for 2023 and beyond.
- Leisure travel will benefit from ongoing flexibility afforded by remote work; 34% of U.S. leisure travelers plan to work while on a vacation.
- The increased cost for paid accommodations and other trip components continues to impact Hawai‘i’s value for the money proposition. The tension of these impacts has the potential to create a “book away from Hawai‘i” environment.



MARKET SITUATION

BOOKING PACE



- Q'2 booking pace is flat vs. Q2 2022
 - Softness starting in May and through the summer.
- 2023 Holiday/Festive hotel reservations are pacing ahead of the 2022 season.
- Booking window is 121+ days out, but pick-up within 60 days is greater than prior year.
 - O'ahu booking window (120+ days) now exceeds that of the average for neighbor island booking (95+ days). This is counter to pre-COVID booking patterns.

MARKET SITUATION

DISTRIBUTION CHANNEL & LEAD TIME



- Wholesalers report that Hawai'i is performing better than other domestic destinations, though international destinations are still performing better than Hawai'i.

MARKET SITUATION

COMPETITIVE LANDSCAPE



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

- For the first time since 2018, Tahiti will be in cities across the U.S. with consumer promotions and destination training.
- The Hong Kong Tourist Board is giving away 500,000 plane tickets.
- Utah now has a blend of destination management and destination marketing; encouraging travelers to explore Utah thoughtfully and safely, treating ecosystems and cultural sites with respect, and engaging with local communities.
- To counter past tourist party behavior, Bali's new campaign encourages travelers to "respect Balinese cultural customs".

TARGET AUDIENCE



CORE SEGMENT

**The Mindful
Hawai'i Target
Traveler**

SUB-SEGMENTS



The Eco-Conscious



**The Culturally
Curious**



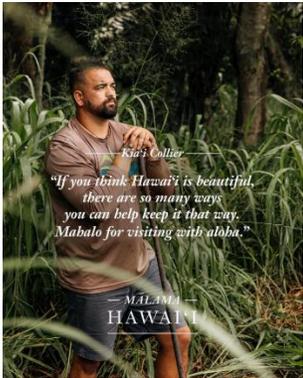
The Service-Minded



**The Unobtrusive
Explorer**

CORE BRANDING MESSAGE

CORE BRANDING MESSAGE



Mālama Hawai'i



Kuleana / Travel Tips

CORE BRANDING MESSAGE

REACTION TO MĀLAMA HAWAI‘I MESSAGING

Reaction to the videos was positive with important gains over last year.

Compared to last year, more consumers agree that the Mālama videos show experiences they would want to do on vacation and enhance their interest in visiting.

80% said the videos make them feel that the people of Hawai‘i are welcoming – an increase of 5 points.

How much do you agree that the video...?	Average		
	2021	2022	Change
Shows the reasons I want to visit Hawai‘i	57%	64%	7%
Represents what I want to do on vacation	54%	60%	6%
Describes something I am interested in	61%	67%	6%
Makes me feel that the people of Hawai‘i will welcome me	75%	80%	5%
Helps me picture myself in Hawai‘i	66%	71%	4%
Makes me want to visit Hawai‘i	68%	72%	4%
Shows a side of Hawai‘i that is surprising or unexpected	68%	71%	3%
Fits with my image of Hawai‘i	72%	74%	2%
Makes me wonder what else Hawai‘i has to offer	71%	73%	2%
Makes me feel good about choosing to visit Hawai‘i	75%	77%	2%
Tells me something new about Hawai‘i	74%	76%	1%
Makes me think a vacation in Hawai‘i will be unique	75%	76%	1%

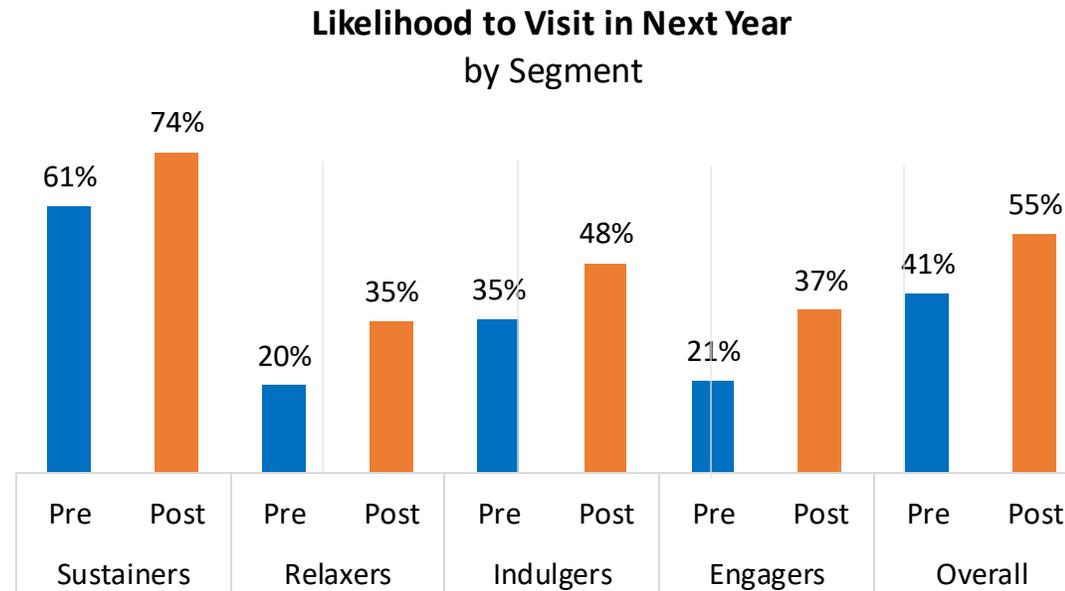
Source: SMARInsights, HTA Campaign Effectiveness Q1 Study

CORE BRANDING MESSAGE

IMPACT OF MĀLAMA HAWAI‘I VIDEOS

Overall, likelihood to visit increased 14 points after viewing the videos.

Sustainers are the most likely to visit and represent the core of the target market.



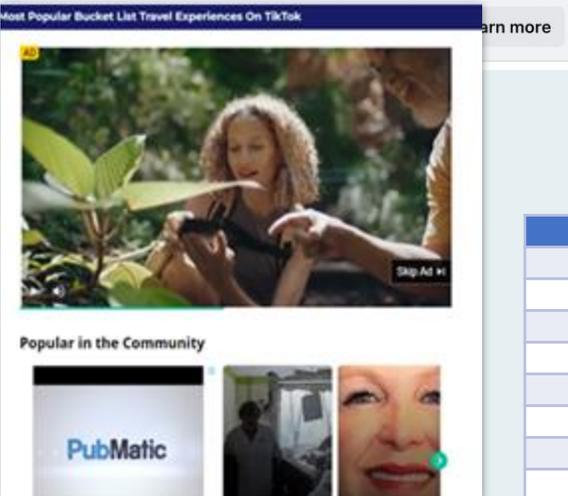
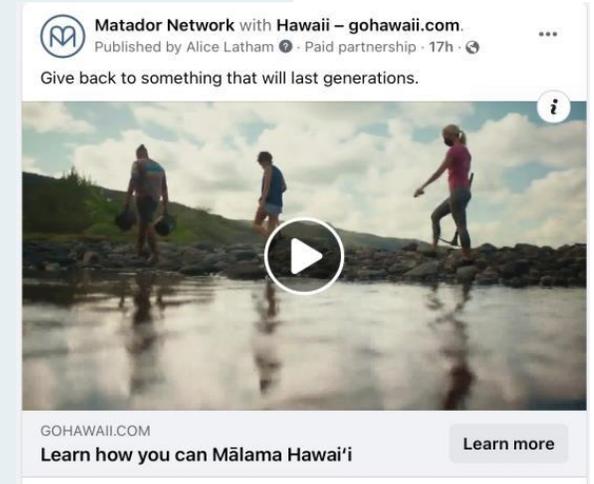
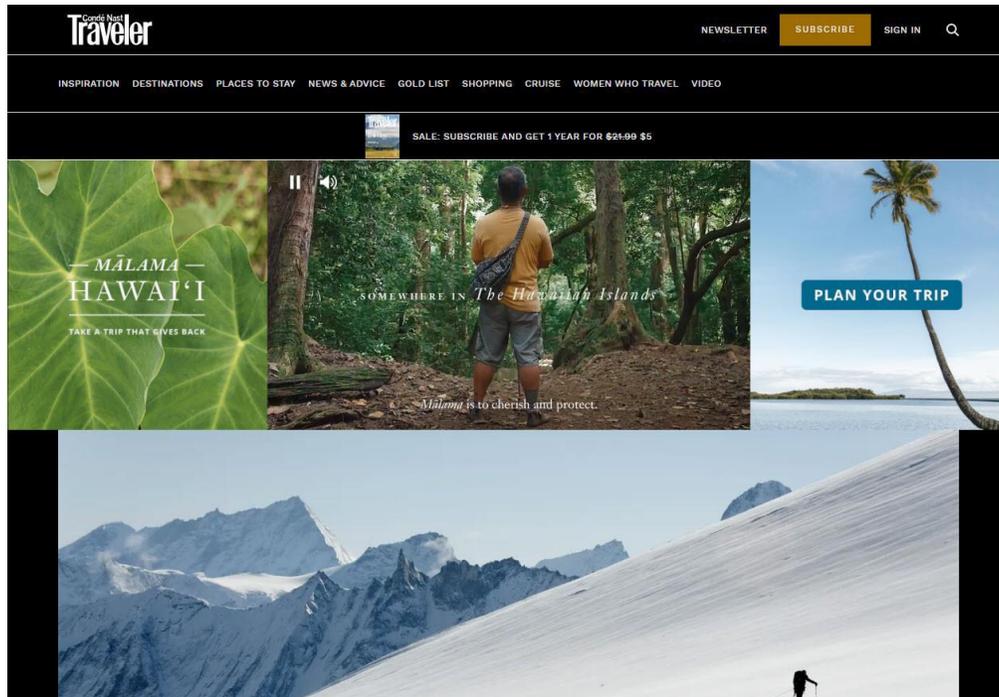
Calculated likelihood – 100% of already planning,
80% of very likely
& 20% of somewhat likely

Source: SMARInsights, HTA Campaign Effectiveness Q1 Study

Q1 REVIEW

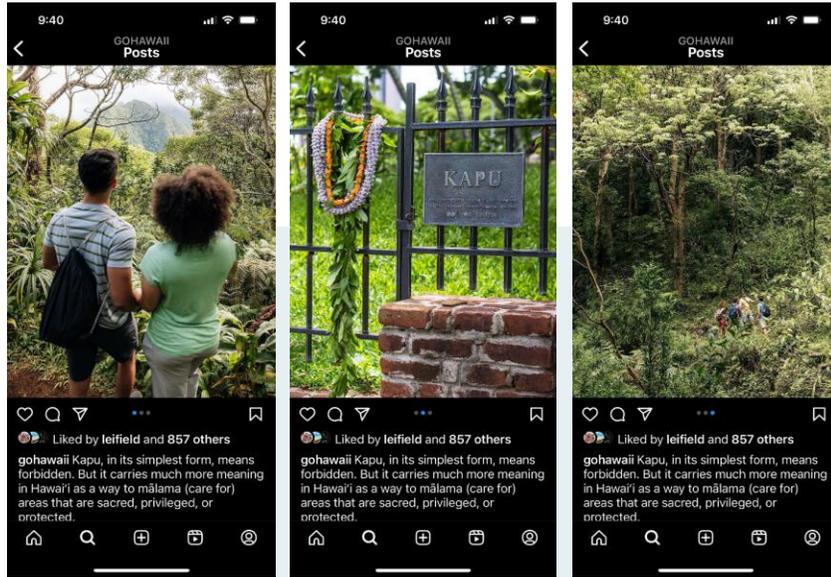


Q1 REVIEW MEDIA PLAN

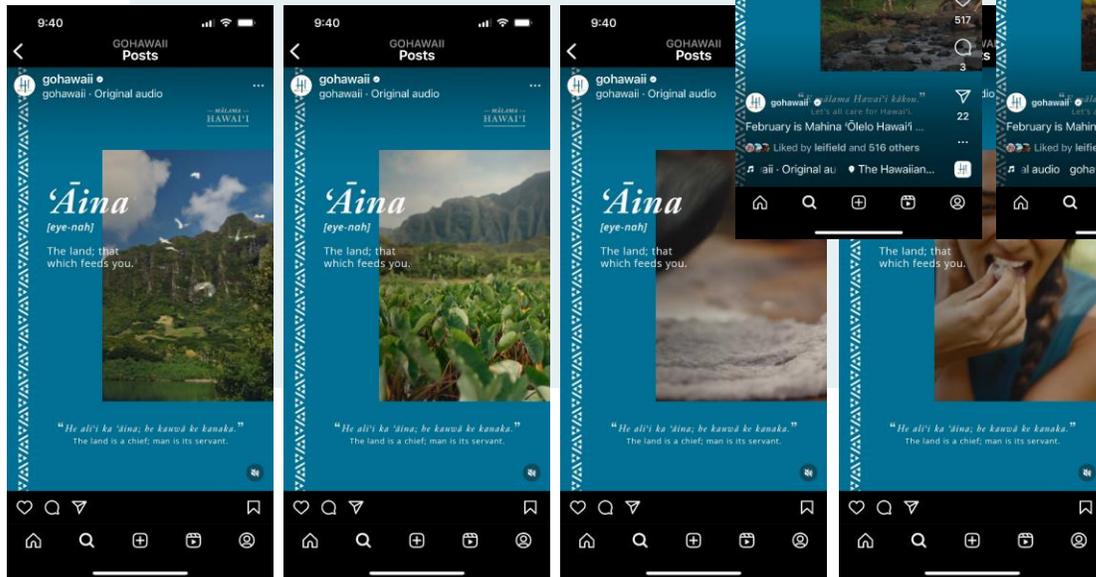
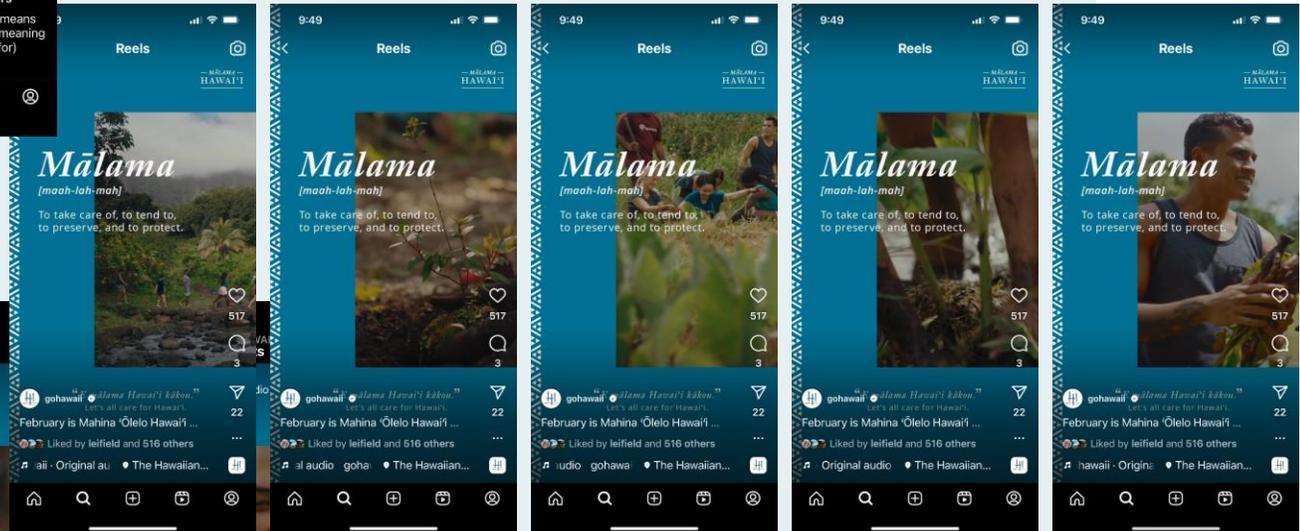


Partner	Impressions
Amazon	16,081,633
Hulu	15,182,432
Roku	16,326,531
LG	4,750,000
BuzzFeed	3,225,000
Conde Nast	7,400,000
Matador	3,000,000
Trip Advisor	6,410,256
Nativo	4,837,500
OMDp	6,028,571
Adtheorent	8,500,000
Tremor	5,425,000
Viant	5,000,000
Search	60,000

Q1 REVIEW SOCIAL MEDIA



Mahina 'Ōlelo Hawai'i



Mālama Hawai'i

Partner	Impressions
Facebook	116,484,325
Instagram	6,291,437
YouTube	27,999,786

Q1 REVIEW PGA TOUR

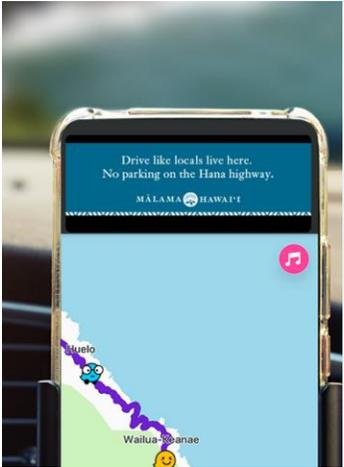


PGA Aloha Season - Morikawa



Partner	Impressions
Golf Channel	TBC
pgatour.com	727,273

Q1 REVIEW KULEANA



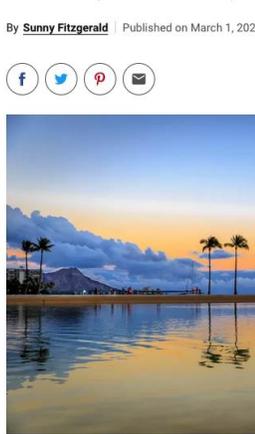
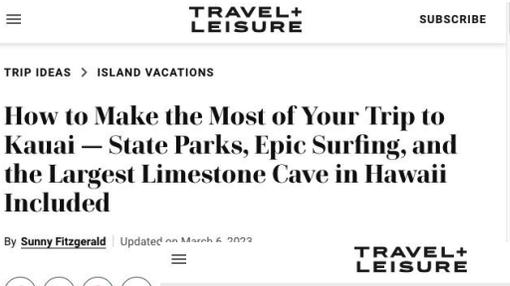
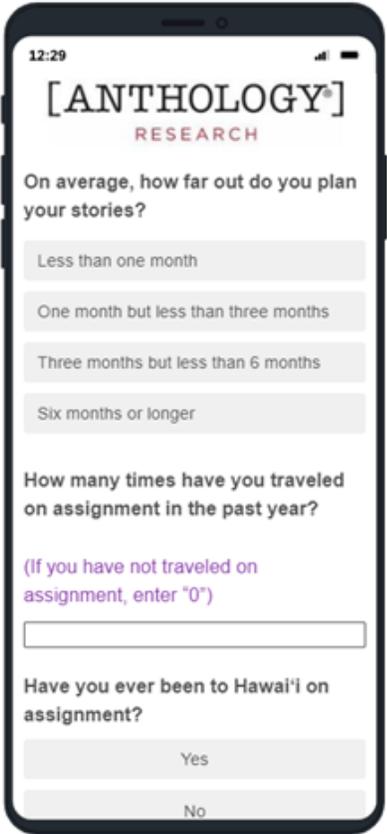
- Airport Messaging
- Hotel Shuttles
- Waze
- In-Room Video
- Social Media
- GoHawaii App

Partner	Impressions
NMG	498,409
Spectrum - OOH	3,241,174
Roberts	75,105
Spectrum - Digital	6,410,732
CCA/DKI Airport	3,822,296

Q1 REVIEW PUBLIC RELATIONS

Q1 Major Initiatives & Results

- Completed Media Research: Quantitative & Qualitative
 - Surveyed nearly 200 media
 - Presentations to Partners across the islands are forthcoming
- Travel + Leisure stories



Earned PR	Jan - Mar
Digital Publicity Value	\$35,914
Digital Impressions	40,839,553

PHOTO: MATT ANDERSON PHOTOGRAPHY/GETTY IMAGES



You're Invited!

March 28: Hawai'i Cultural Webinar
Ka Ho'oilina Ali'i, Hawai'i's Royal Heritage

Q1 REVIEW PUBLIC RELATIONS



Live from 'Iolani Palace
*The Royal Residence
of the Hawaiian Kingdom*

Tuesday, March 28
1 p.m. EDT; 10 a.m. PDT; 7 a.m. HST
[Register & Save the Date >>](#)

- 80 attendees
- Produced version to be distributed to full media list



Q1 REVIEW TRAVEL TRADE

Q1 Major Initiatives & Results

- Exceeded Certification Targets by 72% with 3,188 Certifications Completed
- Conducted Educational Blitz in 4 key markets with 17 Partners Reaching 152 travel advisors
- Executed Travel Advisor Survey with over a 1,000 respondents providing insight regarding competitive destinations and resources



BMP UPDATE



BMP UPDATE

	2023		
	Apr	May	Jun
Messaging	Mālama Hawai'i - U.S. Continent Kuleana - In Hawai'i		
Media			
Earned			
Editorial Opportunities			
Media Visits			
Virtual Media Blitz			
Social			
Organic			
Paid			
Advertising			
Advanced TV			
Digital			
Search - Google			
Enewsletters			
Gohawaii.com			
Travel Trade			
Messaging - Travel Trade			
Advertising			
Trade Media			
Consortia Programs			
Partnerships			
Cooperative Opportunities - Industry Partners			

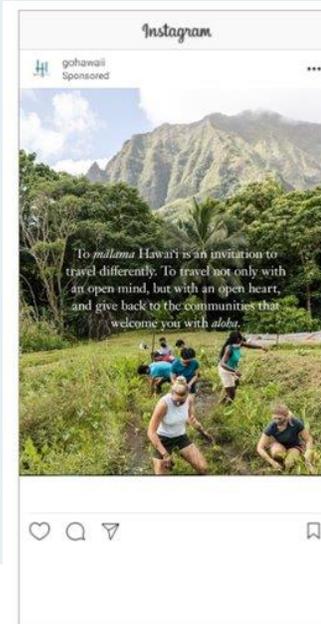
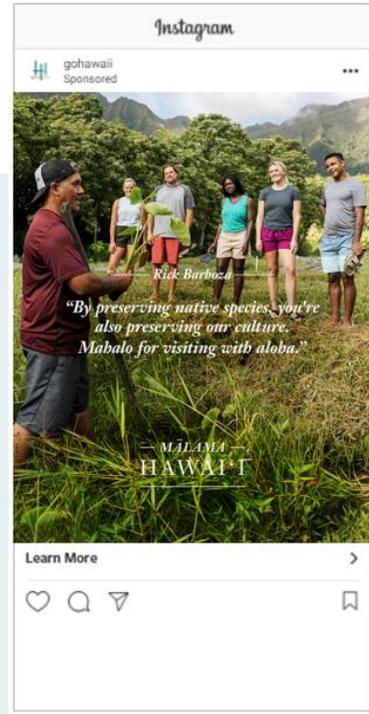
*Flight dates pending plan / creative approval.

BMP UPDATE

PAID MEDIA



BMP UPDATE SOCIAL MEDIA

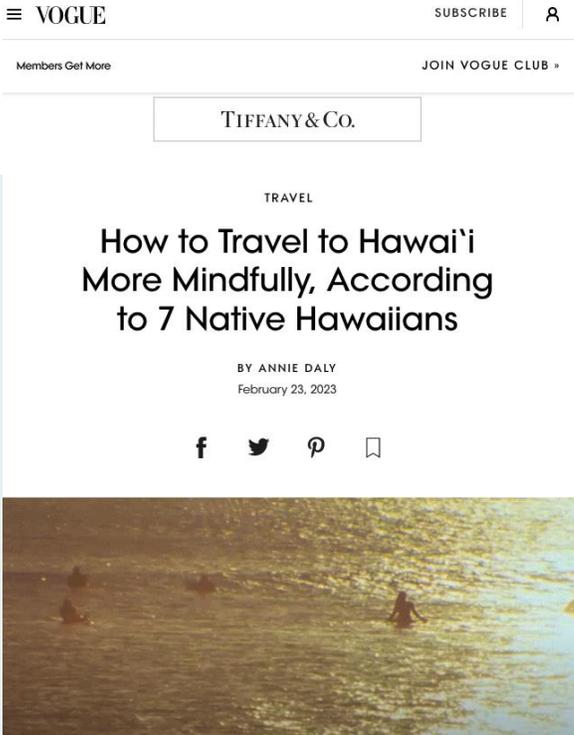


BMP UPDATE

PUBLIC RELATIONS

Future Major Initiatives

- Media Education: Mālama messaging, regenerative tourism
- Virtual Media Blitz
 - Week of one-on-one appointments with 30-40 media from Hot 100 List
- PRSA Travel & Tourism Conference



2023 Section Conference

Tales Between Two Lakes
June 20-23 • Madison, Wis.

BMP UPDATE TRAVEL TRADE



what is mālama?

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

“It's not only about change but about healing. I think that's a big part of our work. We're healing the land, we're healing the people, we're healing ourselves.”

Nicoleani Lee,
Aquaculture Restoration

Future Major Initiatives

- Continue to update content and design of travel trade website
- Create a webinar library featuring presentations on Mālama Hawai'i, Hawaiian culture and individual island brands
- Develop "Know Before You Go" pieces for travel advisors and partners that highlight Mālama Hawai'i messaging and Kuleana travel tips

PARTNERSHIP OPPORTUNITIES

PARTNERSHIP OPPORTUNITIES

HVCB/ ISLAND CHAPTER	ACTIVITY	DESCRIPTION	DATE	LOCATION	COST	CONTACT
CONSUMER						
HVCB	Mālama Hawai'i Program	Visitors are encouraged to give back to the destination by participating in the Mālama Hawai'i Program. The U.S. brand media campaign call-to-action drives to gohawaii.com/malama, which lists volunteer opportunities and offers.	Ongoing	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	\$0	Lei-Ann Field lfield@hvcb.org
HVCB, KVB, OVB, MVCB, IHVB	The Official Hawai'i Visitor Guidebooks: Experience Kaua'i Experience O'ahu Experience Maui, Molokai, Lāna'i Experience Hawai'i Island	The Hawai'i Visitor Guidebooks are the official post-arrival, island-specific guides for Kaua'i, O'ahu, Maui/Moloka'i/Lāna'i and Island of Hawai'i. They are published semi-annually in print and digital formats for use in-destination to promote local activities, dining, shopping, products and services. Distributed at airports and key strategic visitor locations on each island.	Semi-Annual	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	Varies	HVCB Membership membership@hvcb.org
HVCB	Enewsletter: Islands of Aloha Express	Consumer newsletter offers partners an opportunity to reach up to 215,000 opted-in subscribers who have expressed an interest in traveling to the Hawaiian Islands. It includes stories about Hawai'i, festivals and events calendar, travel planning tips, and special offers.	Monthly	U.S.	Varies	HVCB Membership membership@hvcb.org
TRAVEL TRADE						
KVB	Webinars	Webinars to promote mālama Kaua'i, unique island activities and provide destination updates.	Quarterly	U.S.	\$0	Maile Brown Maile@hvcb.org
OVB	"What's New On O'ahu" Destination Updates Webinars	Webinars highlighting updates and what's new on O'ahu.	Quarterly	U.S.	\$0	Karishma Chowfin karishma@visit-oahu.com
MVCB	Educational Webinars: Maui	Advisors receive Maui Nui destination updates, including resorts, activities, events and travel in and around Maui Nui and the Hawaiian Islands.	Quarterly	U.S.	\$0	June Pagdilao june@mauivb.com
IHVB	Island of Hawai'i Educational Webinars	Target top Hawai'i retail travel advisors and wholesale partners to share destination messaging and island of Hawai'i updates.	Quarterly	U.S.	\$0	Deanna Isbister disbister@hvcb.org

PARTNERSHIP OPPORTUNITIES

HVCB/ ISLAND CHAPTER	ACTIVITY	DESCRIPTION	DATE	LOCATION	COST	CONTACT
PUBLIC RELATIONS						
HVCB, KVB, OVB, MVCB, IHVB	Individual Media Visits	HVCB and the Island Chapters work closely to coordinate multi-island and island-specific visits for qualified journalists, incorporating Mālama Hawai‘i. Partners contribute accommodations, activities, meals.	Ongoing	Kaua‘i, O‘ahu, Maui, Moloka‘i, Lāna‘i, Island of Hawai‘i	In-Kind Support	HVCB: Lei-Ann Field lfield@hvcb.org KVB: Shere'e Quitevis sheree.quitevis@finnpartners.com OVB: Pua Sterling pua.sterling@finnpartners.com MVCB: Leanne Pletcher leanne@mauivb.com IHVB: Donna Kimura dkimura@hvcb.org
HVCB, KVB, OVB, MVCB, IHVB	Virtual Media Blitz	HVCB and the Island Chapters coordinate appointments with key media via Zoom to share destination updates and promote Mālama Hawai‘i and mindful travel.	May		\$0	HVCB: Lei-Ann Field lfield@hvcb.org
KVB	News Release: What’s Blooming on the Garden Island	News release distributed on a quarterly basis to media, stakeholders and international contractors.	Quarterly	U.S	\$0	KVB: Shere'e Quitevis sheree.quitevis@finnpartners.com
OVB	Media eNewsletter: News, Updates and Aloha from O‘ahu	Quarterly newsletter sent to OVB media database with the latest information on industry updates. This is shared with HTA’s Global Marketing Partners (GMTs) and adjusted for Travel Trade distribution.	Quarterly	U.S.	\$0	Pua Sterling pua.sterling@finnpartners.com Jacob Revells jacob.revells@finnpartners.com
MVCB	Enewsletter: Message from Maui Nui	Enewsletter sent to partners requesting the latest information on accommodations, restaurants and activities. Primary audience is travel media as well as industry partners.	Quarterly	U.S.	\$0	Leanne Pletcher leanne@mauivb.com
IHVB	Eblast: What’s Sizzlin’	Themed email distributed to media, stakeholders, and global marketing partners. A copy of What’s Sizzlin’ also resides on the GoHawaii media site.	Distributed bi-monthly	U.S.	\$0	Donna Kimura dkimura@hvcb.org

MAHALO!

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Presentation and Discussion on Air Service to Hawai'i

HAWAI'I AIR SERVICE UPDATE

Jeffrey Eslinger, Senior Director Market Insights
Hawai'i Tourism United States

April 27, 2023

HAWAI'I TOURISM[™]
AUTHORITY

Global Airline Overview

- Despite ongoing macroeconomic uncertainty, the air travel industry is building steadily towards an anticipated strong peak during the 2023 northern hemisphere summer. The industry continues to build its resilience, with airlines emerging from the pandemic with a renewed focus on their service to changed passenger preferences
- Domestic markets and global short haul leisure travel should exceed pre-pandemic levels in the upcoming peak travel period. The desire for ‘revenge travel’ has still not abated (particularly in markets that were slow to re-open) and pent-up travel demand shows only a few signs of abating
- Returning Asia Pacific travel volumes are being welcomed – even if the recovery is still not progressing as rapidly as hoped. Growing intercontinental travel will be particularly beneficial to airlines in the region
- The industry may need to adjust expectations about the return of business travel. The sector – which drives as much as half of revenues for some airlines – continues to come back, but the size of the market overall may not be where it was prior to the pandemic
- Recent oil market uncertainty is unwelcome, but the industry has proved it can operate profitably even in the face of substantially higher jet fuel costs and consumer sensitivity to higher airfares

OPEC+ Surprises with Production Cut of 1.2 million Barrels per Day

Argus US jet fuel index



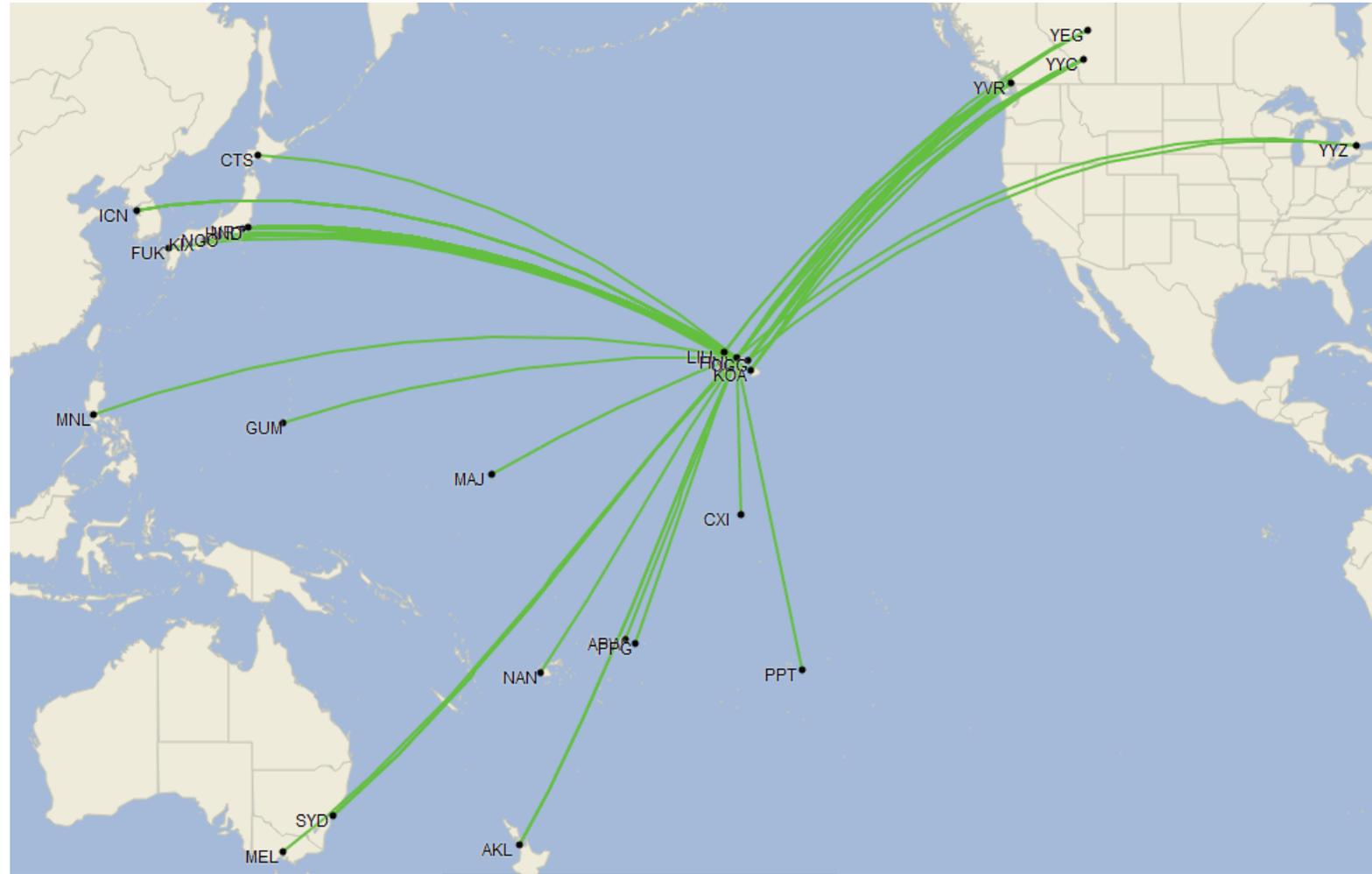
April 7, 2023
\$2.60/gallon

SERVICE TO HAWAII

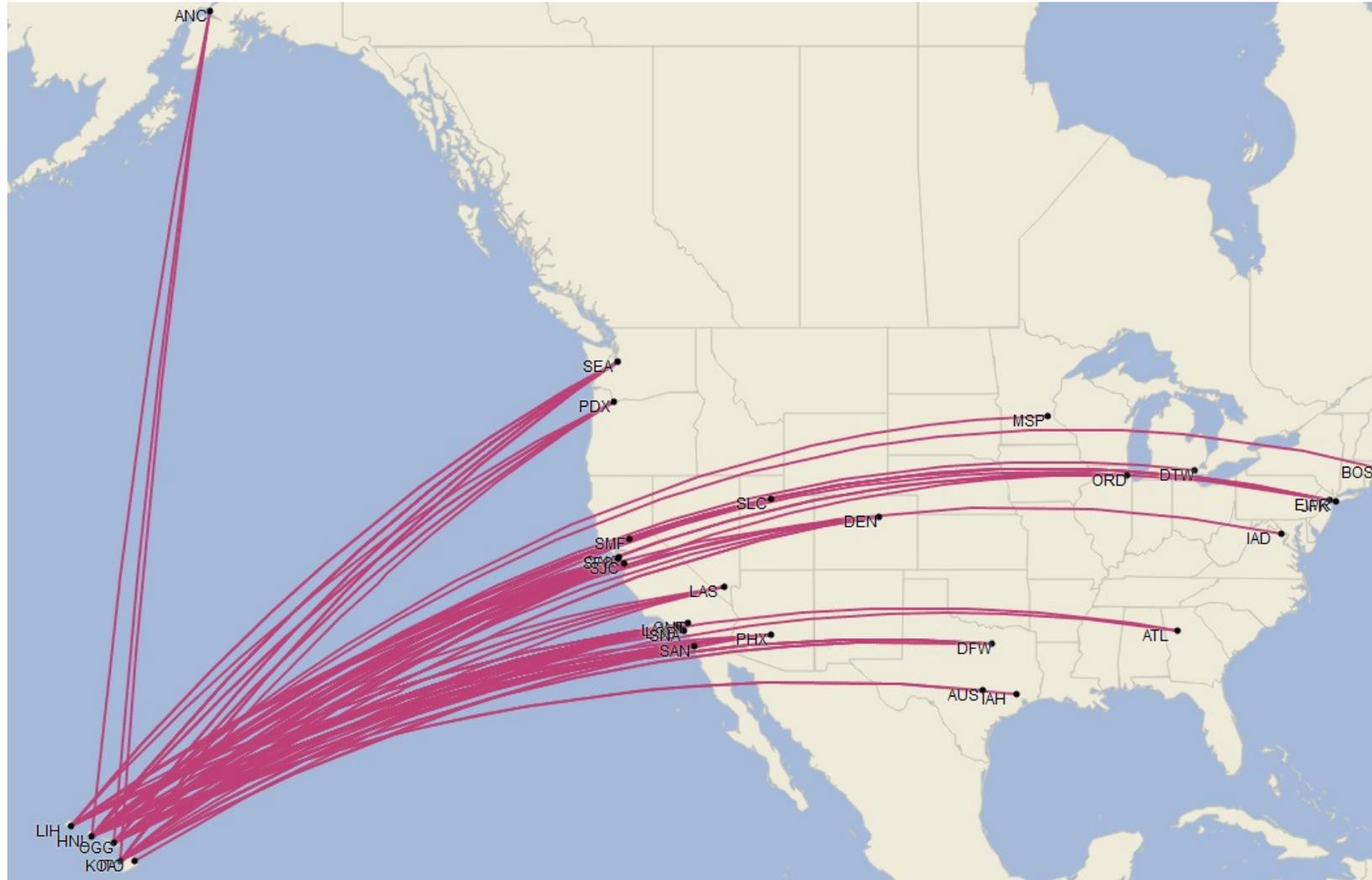
Serving Hawai'i – 19 Carriers



Non-Stop International Markets into Hawai'i (all airports)



Non-Stop U.S. Markets into Hawai'i (all airports)



U.S. TRANS-PACIFIC AIR SEAT SYNOPSIS

	# of SEATS 2019	# of SEATS 2022	# of SEATS 2023P	% Change 23/19	% Change 23/22
O'ahu	4,962,887	5,581,303	5,681,600	14.5%	1.8%
Maui	2,668,370	3,158,201	2,909,848	9.0%	-7.9%
Kona	1,104,675	1,312,548	1,291,286	16.9%	-1.6%
Kaua'i	962,986	1,147,751	1,002,118	4.1%	-12.7%
Hilo	47,872	47,433	1,162	-97.6%	-97.6%
Total	9,746,790	11,247,236	10,886,014	11.7%	-3.2%



Fuel Surcharges Impacting Demand – Each Way as of 4/17/23



Originating Flights on tickets issued March 1-March 31, 2023 to Hawai'i (\$213)
Originating Flights on tickets issued April 1-May 31, 2023 to Hawai'i (\$191)



Originating Flights on tickets issued Dec. 2022-March 31, 2023 to Hawai'i (\$232.2)
Originating Flights on tickets issued April 1 –May 31, 2023 to Hawai'i (\$160.6)



Originating Flights on tickets issued Dec. 2022 –March 31, 2023 to Hawai'i (\$91.8)
Originating Flights on tickets issued April 1-30, 2023 to Hawai'i (\$80.8)



Originating Flights on tickets issued Dec. 2022 –March 31, 2023 to Hawai'i 128,600 KRW (\$99.8)
Originating Flights on tickets issued April 1-30, 2023 to Hawai'i (\$78.61)

TRANS-PACIFIC AIR SEAT SYNOPSIS BY COUNTRY

	# of SEATS 2019	# of SEATS 2023P	% Change 23/19
Australia	369,282	241,448	-34.6%
Canada	484,613	485,774	0.2%
China	116,539		
Cook Islands		6,237	
Fiji	8,414	11,220	33.3%
French Polynesia	18,718	14,456	-22.8%
Japan	1,999,204	1,150,835	-42.4%
Kiribati	6,848	5,950	-13.1%



TRANS-PACIFIC AIR SEAT SYNOPSIS BY COUNTRY

	# of SEATS 2019	# of SEATS 2023P	% Change 23/19
Marshall Islands	34,448	29,714	-13.7%
New Zealand - Aotearoa	125,300	94,274	-24.8%
Philippines	73,248	80,649	10.1%
South Korea	326,398	283,124	-13.3%
Taiwan	39,780	7,038	-82.3%
United States	9,913,374	11,048,919	11.5%
Western Samoa	8,090	8,840	9.3%



MAHALO

Jeffrey Eslinger
Senior Director Market Insights
Hawai'i Tourism United States

jeslinger@hvcb.org

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Update on RFP 23-02 Hawai'i Tourism Destination
Brand Management & Marketing Services for the
Canada Major Market

RFP 23-02 Hawai'i Tourism Destination Brand Management & Marketing Services for the Canada MMA



Important Dates

RFP 23-02 - Hawai'i Tourism Destination Brand Management & Marketing Services for the Canada MMA	
ACTIVITIES	SCHEDULED DATE
Release of Request for Proposals	March 14, 2023
Pre-Proposal Conference	March 17, 8:00 a.m. - 9:30 a.m. HST
Deadline to Submit Written Questions (must be submitted in HlePro)	March 20, 2023, 4:30 p.m. HST
State's Response to Written Questions (will be posted in HlePRO)	March 22, 2023
Deadline to Submit Notice of Intent to Offer	March 24, 2023, 4:30 p.m. HST
Proposal Due Date/Time, Evaluation Period Begins	April 21, 2023, 2:00 p.m. HST
Priority Listed Offeror Selection & Notification	Week of April 24, 2023
Oral Presentations with Priority Listed Offerors	May 5, 2023
Best and Final Offer Deadline (if necessary)	Week of May 8, 2023
Notice of Award	May 15, 2023
Start of Contract Performance	June 30, 2023
End of Initial Contract Term	December 31, 2025
End of 2-Year Option if Exercised	December 31, 2027

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Update on RFP 23-03 Hawai'i Tourism Destination Brand Management & Marketing Services for the United States Market

RFP 23-03 Hawai'i Tourism Destination Brand Management & Marketing Services for the United States Market



Important Dates

RFP 23-03 - Hawai'i Tourism Destination Brand Management & Marketing Services for the US Market	
ACTIVITIES	SCHEDULED DATE
Release of Request for Proposals	February 13, 2023
Pre-Proposal Conference	February 21, 2023, 8:00 a.m. - 9:30 a.m. HST
Deadline to Submit Written Questions (must be submitted in HlePro)	February 24, 2023, 4:30 p.m. HST
State's Response to Written Questions (will be posted in HlePRO)	February 27, 2023
Deadline to Submit Notice of Intent to Offer	March 1, 2023, 4:30 p.m. HST
Proposal Due Date/Time, Evaluation Period Begins	March 30, 2023, 2:00 p.m. HST
Priority Listed Offeror Selection & Notification	Week of April 10, 2023 Week of April 17, 2023
Oral Presentations with Priority Listed Offerors	April 17, 2023 April 24, 2023
Best and Final Offer Deadline (if necessary)	Week of April 24, 2023 Week of May 1, 2023
Notice of Award	May 3, 2023 May 8, 2023
Start of Contract Performance	June 1, 2023 June 8, 2023
End of Initial Contract Term	December 31, 2025
End of 2-Year Option if Exercised	December 31, 2027