



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

**BRANDING STANDING COMMITTEE MEETING  
HAWAII TOURISM AUTHORITY**

HĀLĀWAI KELEKA'A'IKE  
VIRTUAL MEETING

*Pō'ahā, 12 Kekemapa 2024, 9:00 a.m.*  
**Thursday, December 12, 2024 at 9:00 a.m.**

*E ho'olele 'iwa'ia ka hālāwai ma o ka Zoom.* Meeting will be live streaming via Zoom.

<https://us06web.zoom.us/j/84119961475>

*E noi 'ia paha 'oe e kāinoa me kou inoa a leka uila paha. 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.*

**You may be asked to enter your name or email. The Board requests that you enter your full name, but you may use a pseudonym or other identifier if you wish to remain anonymous.**

**Kelepona / Call In: 16694449171**  
**Helu Hālāwai / Webinar ID: 841 1996 1475**

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

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

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

**Written testimony received ahead of the preparation of the committee packet will be included in the packet. Email written testimony to Carole Hagihara-Loo at [Carole@gohta.net](mailto:Carole@gohta.net) or hand-deliver or send via postal mail to the Hawaii'i Tourism Authority office, 1801 Kalākaua Avenue, 1<sup>st</sup> Floor, Honolulu, HI 96815. Written testimony received after the issuance of the committee packet (two business days prior to the meeting) will be distributed to the committee and available for public inspection at the meeting.**

PAPA KUMUMANA'O  
AGENDA

1. *Ho'omaka a Wehena*  
**Call to Order and Opening Protocol**
2. *Kikolā*  
**Roll Call to Announce Name of Participating Board Members and to Identify Who Else is Present with Board Member if Location is Nonpublic**
3. *Wehena*  
**Opening Protocol**
4. *'Āpono Mo'olelo Hālāwai*  
**Approval of Minutes of the July 23, August 19, September 9, and November 21, 2024 Branding Standing Committee Meetings**
5. *Hō'ike'ike a Kūkā no nā Pāhana Hokona "Powered by the HTA"*  
**Presentation and discussion on a "Powered by the HTA" Campaign and Initiatives**
6. *Hō'ike'ike, Kūkā a 'Āpono i ka Papahana LA Rams no ka Makahiki 2025*  
**Presentation, Discussion, and Action on the LA Rams 2025 Program**
7. *Hō'ike'ike, Kūkā a 'Āpono o ka Huaka'i a Hana Hokona ma LA a me ka Huaka'i a Hana Hokona Hou Aku ma ka Makahiki 2025 na HTUSA*  
**Presentation, Discussion and/or Approval on the Findings from the LA Saturation Activation and Plans for 2025 Market Saturation Activation**
8. *Hō'ike'ike a Kūkā no ka Holomua o nā Pāhana EDA e Ka'ana ma Lalo o ka American Rescue Plan Act*  
**Presentation and Discussion on the Progress of EDA's Non-Competitive State Tourism Grant under the American Rescue Plan Act**
9. *Nūhou no ka Hana me Brand USA a me Expedia*  
**Update on the Partnership with Brand USA and Expedia**
10. *Hō'ike'ike a Kūkā no ka Holomua o ka Palapala Hō'ike no ka 'Ōnaehana Ho'opa'a*  
**Presentation and Discussion on the Progress of the Reservation System Report**
11. *Nūhou no nā Kūlana Destination Manager Hakahaka*  
**Update on HTA Destination Manager Vacancies**

## 12. Ho'oku'u Adjournment

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

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

*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 e like me ka wikiwiki i hiki, 'a'ole ho'i a ma 'ō aku o ka 'ehā 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 like me ka mea pono.*

If you need an auxiliary aid/service or other accommodation due to a disability, contact Carole Hagihara-Loo at (808) 973-2289 or [carole@gohta.net](mailto:carole@gohta.net) as soon as possible, preferably no later than 3 days prior to the meeting. **Requests made as early as possible have a greater likelihood of being fulfilled.** Upon request, this notice is available in alternative/**accessible** formats.

*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 Kalākaua Avenue, Honolulu, Hawai'i, 96815 ka helu wahi.*

In accordance with HRS section 92-3.7, the Hawai'i 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 Hawai'i Convention Center at 1801 Kalākaua Avenue, Honolulu, Hawai'i, 96815.

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**Approval of Minutes of the  
July 23, 2024, August 19, 2024, September 9, and  
November 21, 2024  
Branding Standing Committee Meetings**



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**BRANDING STANDING COMMITTEE MEETING  
HAWAII TOURISM AUTHORITY  
Tuesday, July 23, 2024, at 2:30 p.m.**

**Virtual Meeting**

**MINUTES OF THE BRANDING STANDING COMMITTEE MEETING**

<b>MEMBERS PRESENT:</b>	Blaine Miyasato (Chair), David Arakawa (Zoom), Roy Pfund (Zoom), Mufi Hannemann
<b>MEMBER NOT PRESENT:</b>	Kimberly Agas
<b>HTA STAFF PRESENT:</b>	Kalani Ka'anā'anā, Isaac Choy, Jadie Goo, Ilihia Gionson, Maka Casson-Fisher, Iwalani Kūali'i Kaho'ohanohano, Jennifer Bastiaanse
<b>GUESTS:</b>	Jeffrey Eslinger, Kara Imai, Lynn Whitehead

**1. Call to Order**

Chair Miyasato called the meeting to order at 2:38 p.m.

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

Mr. Gionson did the roll call, and members were confirmed in attendance by themselves.

**3. Opening Protocol**

Mr. Casson-Fisher did the opening cultural protocol.

**4. Approval of Minutes of the June 20, 2024 Branding Standing Committee Meeting**

Mr. Hannemann made a motion to approve the minutes, and Mr. Arakawa seconded with the assumption that the minutes would include the amendments he made in the July 22,

2024, Administrative and Audit Committee meeting minutes. Mr. Gionson did the roll call, and the motion carried with Mr. Arakawa's reservations.

**5. Presentation and/or Discussion Regarding an Update on the Meetings, Conventions and Incentives Market Activity and Pace Report, and Hawai'i Convention Center Activity and Local Sales**

Ms. Whitehead commended everyone for the great work and time that they gave to the state of Hawai'i. She said Meet Hawai'i is a collaboration of the Hawai'i Visitors and Convention Bureau (HVCB) and Hawai'i Convention Center (HCC) to reinforce the brand of the Hawaiian Islands as a world-class destination for business meetings, conventions, and incentive programs.

Ms. Whitehead and Ms. Orton meet weekly. The sales teams meet to go over what is on the books and strategize toward the right business for the building. The client services team and event management team continually collaborate. The Citywide sales team is responsible for booking offshore programs 13 months after arrival, and the local sales team is focused on booking groups within 13 months. The client services team focuses on the destination components and putting together the entire program. The event management team at the HCC is responsible for everything inside the building. The single property team is responsible for booking hotel meetings on all islands. Ms. Whitehead spoke about the follow-up from the last meeting. Chair Hannemann and Mr. Arakawa offered some suggestions during the call. Both FESTPAC and Okinawan Festival are local events, and Ms. Whitehead and Ms. Orton had a call after the meeting to do a deeper dive into how they could respond to those questions. She reached out to Andrew Koh, the leader of the Oceania team. For FESTPAC, Chair Hannemann wanted to see what they could do to take advantage of the momentum generated from FESTPAC. The focus will be on Australia and New Zealand. Chris oversees Oceania and is working with some media to put that in front of the customers to see how they can generate some excitement for Hawai'i.

Mr. Arakawa had suggested how they could try to get more attendance at the Okinawan Festival. Mr. Andrew Bailey and Mr. Haichia, the country manager for Japan, are working on an MOU with the Japan Travel Bureau. It was suggested that we see what can be done in the MOU to create and drive more attendance for all festivals in the building.

She spoke about the Economic Impact that Meet Hawai'i and the MCI business represents. Economic Impact: 2022 (awaiting 2023 data in August)

- Offshore events generate \$808 B in total meeting attendee expenditures for the state of Hawai'i.
- Meet Hawai'i's citywide/single property teams generated \$452.2 M (56%) of the total

meeting attendee expenditures.

MCI offshore business is a significant driver of Hawai'i's economy:

- Higher spending, distributes spending to all islands, creates compression which drives higher ADR, Pre/Post stays

MCI Business sales and marketing process is unique:

- Sales: Longer sales cycle, complexity and customization, decision-making process.
- Marketing: Content and messaging, targeted digital media, industry relations and strategic partnerships, commitment to sustainability and DEI.

The MCI business always gets back to the community.

She shared the opportunity they have in MCI business. The industry estimates continued growth, with MCI doubling in 10 years since 2021. There is a lot of opportunity.

She spoke about industry market trends in the last presentation from the previous month:

- In the next four years, the incentive segment is expected to be the fastest growing segment in the market, segmented by service type, at a CAGR of 9.3% from 2023 to 2028.
- Sales lead volume - up +18.8% in Q1 2024 over Q1 2019; Tentative room nights and attendance are also up over 2019.
- Planner optimism continues to grow. Over 60% of planners are reporting they will plan more meetings in 2024 than they did in 2023.
- Rising costs remain the planners' top concern.
- International attendees, especially Japanese, are more likely to participate in CSR/Community Give Back Programs.

As they move away from the pandemic, MCI is gaining momentum.

Because of the incentive market and the importance it has for Meet Hawai'i and the growth they will see over the next four years, Meet Hawai'i is:

- Developing a digital messaging strategy targeting incentive groups for all islands
- Q2 production is soft due to signings pushed into Q3.
- Short-term booking cycle will continue into 2025 for citywide and single-property events.
- Allocating incentive dollars to secure key citywide and single property event
- Focused attention on Definite 2024/2025 citywide groups to ensure maximum rotation potential for future years.

She spoke about strategic focus initiatives:

- Enhance incentive program for both single property and citywide to direct need time

frames, push short-term opportunities now, and remain competitive.

- Refine sales strategy with key corporate, incentive houses and third parties to ensure Hawai'i is at the top of the mind.
- Strengthen partnerships with stakeholders to support and secure key industry events in Hawai'i.
- Increase communication from the Meet Hawai'i team with key on-island community stakeholders.
- Update and implement revised operational guidelines for the client services team.
- Reinforce the benefits of Meet Hawai'i groups to the local community, especially with our 'Elele program.

She spoke about Citywide sales production. It has been a flat year to date for definite room nights. From a tentative perspective, they are a bit behind, but she expects to see an increase with the new sellers on board. She spoke about their tentative bookings. They have 36 tentatives, and 55% of those tentatives are 2024 - 2028. 44% are in 2027 and 2028. They are taking advantage of the short-term booking cycle. They just got two verbal definites for 2027 and 2030 that she looks forward to reporting in Q3. It represents 23,000 room nights and \$67 million in economic impact. She spoke about Hawai'i's future pace for Citywide, focusing on definite room nights. She presented the changes from the previous meeting. The previous month, they had a collaborative call with the HTA, and they took the slide from a three-year average target to a five-year average target. She spoke about the slide. In 2027 and 2029, there are a lot of tentative opportunities they are working on. She said they will fall short if they do not continue to book into specific years. 2030 is doing well now but if they do not stay on top of that, they will not stay on pace for the year. For 2026, they will not add any more business due to the construction. In 2024 and 2025, they will have a strong representation of business for local and definite groups. The mix of groups makes the building and destination a success.

For single property production, there was a strong definite room night. For July, they had 15,000 total room nights, representing about \$68 million in economic impact.

Ms. Marykay Lui, the regional director of single property sales, is getting the West Coast sales up and running and will help increase the funnel. She showed a snapshot of the pace of the single property. They were moved to a five-year target. It increased the benchmark slightly. For 2024, they have work and will probably not meet the benchmark. 2025 is looking strong. The reason for doing a three-year in this presentation is due to the single property booking cycle being around 18 months. The tentative room night represented for single property production by the island will not match production as the leads might go to different islands. They always highlight Maui and say that they are open. The North American



sales team and Asia/Oceania have been out in the marketplace, focusing on financial insurance groups for education summits. She highlighted Trevor Newman, who came from the local sales team on Ms. Orton's team and is now deployed in the Bay Area and active in the International Associations of Exhibit and Events (IAEE). He was identified as a future leader with them. The Asia/Oceania team has had several initiatives, such as ITB Asia Shanghai, HIS Corporate Fam, etc.

As they close out the half year, they are at about 47,000 attendees, 107,000 definite room nights, and the economic impact is around \$256 million. There is a lot of work to do, and they are fully deployed to make that happen. She is looking forward to seeing those numbers grow. She will be presenting quarterly. She reminded everyone that it is a collaboration and that if anyone has initiatives or questions about MCI or Meet Hawai'i they must reach out, and she will follow up. Mr. Pfund mentioned a typo on the slide for the 2022 economic impact. He said it should be \$1 million. He agreed about the importance of the MCI market to Hawai'i. He asked about consolidation in the MCI operators with JTB and CNHA doing worldwide marketing. Ms. Whitehead said she would resource Mr. Andrew Bailey and the Asia Oceania team before answering Mr. Pfund's question.

She thanked Mr. Pfund for the typo comment. Chair Miyasato said it was great that Ms. Whitehead took notes, questions, and answers from the previous meeting and brought them through to this meeting. Mr. Arakawa spoke about an event or a festival of people coming home for every community and if they have looked into that to create economic energy and opportunity. Ms. Whitehead said he had brought that point up in the last Branding Standing Committee meeting, and that is what she was addressing during this session. She spoke about the rotation of that and driving it every five years for more attendance. The initiative she took away was how they can drive attendance to the festivals they are already hosting in the building, but they can go back to the drawing table to see if they can try other items. Mr. Arakawa agreed to drive more people to the building for events. He asked if there is a way to calculate the economic impact of local events, buying from local farmers, hiring local people for business, etc.

Ms. Whitehead said the local groups are Ms. Orton's expertise, and they will always generate room nights but at a different level. For music events, for example, some dollars are associated with tracking those metrics for groups like that, so dollars would be needed. In the sports markets, HVCB added Play Easy, a tool to track room nights for their sports groups. They could use that for other groups but only track room nights. She would look at the costs involved. Mr. Arakawa said that he and Ms. Agas had previously asked for the dollar amounts in prior years because the legislature would like to see the numbers in progression, even the numbers going back to 2013. He mentioned that Ms. Whitehead has 5

fewer employees and \$2 million less in the budget, so if they want the numbers, they must put more into the process. Ms. Whitehead asked for the report Mr. Arakawa would like her to mirror. She said the pay slide is looking forward.

Mr. Arakawa asked if they have target goals for room nights, events, and economic impact and if they could create a slide on that. Ms. Whiteheads said they have a goal for room nights and book events, but not for economic impact, but they report on it. She said that could be added. Chair Miyasato said the committee meetings are to get into the fiscal conversations, but it has to be foundational and supported by the plan, vision, message, etc. He asked that Ms. Whitehead give them the tools and the data to help make good decisions and recommendations for the committee. He said it's important for residents to feel good about tourism and the economic benefits, and it is in the community. He said to put on the agenda for the next meeting that Mr. Arakawa's idea will be used as a proxy for how they can do other programs every three to four years.

Ms. Whitehead said that while the MCI business is lumped into visitors, part of its role is to educate the community on what the MCI business delivers. The MCI programs as groups bring in 5,000 attendees and are dedicated to booking destinations committed to DEI sustainability and attracting the right business. They are busy working on their DMAP measurements and making them more meaningful. Their priority is to ensure they can report more and provide more press and PR towards those groups to share that with the community. The MCI is dedicated to the key core pillars of the HTA. Chair Miyasato followed up on Mr. Arakawa's suggestion and said that whatever they can report quarterly can provide a data set that makes the point. She said if there is an opportunity for her to collaborate with them before the next quarterly report, she will welcome that.

Mr. Ka'anā'anā said the other tools they had previously needed to be brought back. In FY2026, they requested it, but they did not do it for MCI, they have a contractor Vision Insights who did an economic and community impact survey on the large sports events, so that helps give a bigger picture. They asked for money to bring the reports back, but they should look at expanding that to MCI events, especially for Citywide events to capture the full picture, so it could be a shared cost. Chair Miyasato said after the meeting they must find a starting point and decide on the different "buckets". Mr. Arakawa said they must remember DBEDT. Mr. Hannemann said he would like to see the sporting opportunity in future reports. Part of the Destination Stewardship responsibilities is to get local teams involved in playing against national and international competition in Hawai'i. Ms. Whitehead will pull the relevant information into the report. Mr. Pfund suggested reaching out to the Hawaii Captives Insurance Council as they have an annual function in Hawai'i where all the executives tied to national and international insurance companies meet. This is a great

opportunity to reach out to them. Ms. Whitehead said Ms. Kathy Dever, director of sales of the mid-west region, has a great presence with the financial groups. One of the initiatives she attended was the financial insurance conference, an excellent market for the state of Hawai'i. She will research the event Mr. Pfund brought up.

## **6. Presentation and/or Discussion on Global Support Services for Brand Management and Marketing**

Mr. Pfund commented on the reporting. It would be very helpful if there was some way to capture all the information and data. Ms. Whitehead said that is why they are bringing the DBEDT report into the process. The statistics show the value of each piece of business, considering all the different components of the attendees when they are attending a convention.

Chair Miyasato said they need to find the perfect mix and the sweet spot, and the data will help determine that, as it is not just for room nights. Ms. Whitehead said the groups must be involved in give-back programs to the islands so that there is an offset in some way. She said that when she went to Hawai'i, she was impressed with the evaluation process for the groups. She said they always ensure they incentivize the groups and give back in some way to the community.

Ms. Imai said the support services are the contracts that cover all the marketing tools the partners utilize, i.e., all the island chapters, the MMAs, the tools, and all the services. Some tools are the GoHawaii website, the knowledge bank, market insights, and airline route development. She said that Kainoa Daines has hired a new team member to support him with destination education. Mr. Keenan Chung, however, is going to be pursuing movie and TV opportunities.

She gave the floor to Mr. Eslinger. Mr. Eslinger said they need to keep the partners aware and educate them with the data needed to make meaningful decisions for their organizations. On the market insights side, he said this could not be done without the hard work of Ms. Chun and the DBEDT team and the HTA resources available to make actionable insights from the data they have access to. They are trying to put out the information for the inner GMTs and HTA leadership, stakeholders within the state, and the continents. They are looking at visitor trends, market profiles, and segmentation. They are using different data sets to do that. They are also leveraging the third-party data in some Ms. Chun's reports. Then, they create a monthly market insights deck in the office to share with the internal stakeholders and all their partners. They are always reactive and responsive to all questions. They also do presentations, whether with GMTs or MCI partners.

He said Ms. Chun and her team will release the 2023 annual report at the end of August or early September. They will take the most recent year-end data and create visual snapshots of what they will call the Hawai'i visitor profile. They will also look at the GMTs that the HTA is currently funding.

Air route development needs to be revised. Their goal is to keep what they have. They have additional seats on some routes that may be oversaturated, and other routes need more. So, it is balancing out the effort. With their funding, they are putting together a strategy and doing some communication, but to have a comprehensive air route development program, they would need additional resources and the coordination of other partners within the state. What they are currently doing on the air route side is using a tool that gives them air service grids they do on a monthly basis that they provide to all the GMTs and the area sales teams they can use as talking points. They do air service grids and a seven-day moving average. They are synthesizing it and making it more user-friendly for the end user. For daily seats into Hawai'i by Origin Country is done on a weekly basis.

They continue to collaborate with the airlines and continue to foster strong relationships with airlines through regular meetings with their network planning, revenue, marketing, and international development teams. Industry Engagement is where they actively participate in industry events like World Routes and Routes Americas to stay updated on industry trends and connect with potential airline partners. What has happened to Maui is very important to them. As part of the contract, he said they had engaged Brad Defiore from Ailevon Pacific, who is working with them on a small strategy component and looking at three major areas of their air situation. The most important is the Maui recovery. The second one is looking at long-haul markets. There are some holes in the international markets. Those conversations will happen with Brad's team and the DBEDT international team. Getting Taiwan service back would be important, too. The third thing is to determine the impacts or potential impacts of the integration of Hawaiian and Alaska Airlines into the state and see how that would look from an origin-destination perspective moving forward. By providing these critical reports and fostering industry relationships, our Air Route Development team ensures informed decision-making for attracting new air routes and optimizing existing ones.

Ms. Imai said the HTA Knowledge Bank is a digital asset management system. There are two sections. One for the public and one for the internal platform that only the HTA partners have access to. Ms. Susie Kim is the Director of Content Development and manages the knowledge bank. She is responsible for processing all the images that come through and adding metadata to them. She has been putting together a wish list for all the different islands for the past few months. Going hand in hand with that is the Hawaiian Island brand guideline responsibilities. There are two parts to that. The Hawaiian Islands Social Media Brand Guidelines and Ma'ema'e Hawai'i style & resource toolkit provide support to the HTA

team. They work hand in hand. They are in the process of updating the brand guidelines and are trying to brainstorm if there is a better way to get this information out to users or combine them to get them online, etc. The most important thing is to portray Hawai'i accurately. She spoke about social media support services.

The HTA social tools support and training:  
Podio – HTA social communication hub  
Sprout Social – social asset management  
TINT – UGC management

She spoke about the websites and the apps:  
Miles Partnership manages and hosts gohawaii.com. CMS training is available.  
GMTs have access to make minor updates on their MMA version of gohawaii.com.  
Wrike system to request major updates.

She spoke about the GoHawaii app. All the updates and content will be updated more efficiently across all channels.

Chair Miyasato said that as they fine tune the process it will go faster, and they can leverage all the strengths.

Mr. Ka'anā'anā added that Kilohana is responsible for working on a scoping document for Chair Quinlan. Part of that is the situational piece to understand the GoHawaii app, its capabilities, and what could be added. Some of the groundwork will happen on the Kilohana side.

Chair Miyasato said their committee is the best one for finding the right path. In the end, it should be one app, not multiple apps. Mr. Ka'anā'anā said the app will go out for bid and implementation. He reminded everyone that they are always working together as staff, so it will ultimately be the HTA's product. Chair Miyasato said that practically speaking avoids any confusion. He said they need to categorize everything to look at it across the board.

## **7. Presentation, Discussion, and Action on Proposed Fiscal Year 2026 and 2027 Hawai'i Tourism Authority Operating Budget for Branding and Marketing (BED114) (01:16:12)**

Chair Miyasato deferred the item.

## **8. Adjournment**

Mr. Hannemann made a motion to adjourn the meeting, and Mr. Arakawa seconded. The meeting was adjourned at 3:55 p.m.

Respectfully submitted,

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

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Sheillane Reyes  
Recorder



Ke'ena Kuleana Ho'opipa O Hawai'i  
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hawaiiauthority.org

**BRANDING STANDING COMMITTEE MEETING  
HAWAII TOURISM AUTHORITY  
Monday, August 19, 2024, at 2:30 p.m.**

**Virtual Meeting**

**MINUTES OF THE BRANDING STANDING COMMITTEE MEETING**

<b>MEMBERS PRESENT:</b>	Blaine Miyasato (Chair), Kimberly Agas, David Arakawa, Mufi Hannemann, Roy Pfund
<b>NON-VOTING MEMBER:</b>	James McCully
<b>HTA STAFF PRESENT:</b>	Daniel Nāho'opi'i, Ilihia Gionson, Trishia Mendoza
<b>GUESTS:</b>	Andrew Koh, Lynn Whitehead, Tyler Gomes
<b>LEGAL COUNSEL:</b>	John Cole

**1. Call to Order and Opening Protocol**

Chair Miyasato called the meeting to order at 2:39 p.m.

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

Mr. Nāho'opi'i conducted the roll call, and members were confirmed in attendance by themselves.

**3. Opening Protocol**

Mr. Nāho'opi'i conducted the opening cultural protocol by sharing his mana'o of what hospitality, ho'okipa, means. He thinks that ho'okipa, treating everyone well, makes Hawai'i a different tourist destination because it is engrained as a traditional value in Hawai'i.

#### **4. Presentation and/or Discussion Regarding an Update on the Meetings, Conventions and Incentives Market Activity and Pace Report, and Hawai'i Convention Center Activity and Local Sales with Meet Hawai'i**

Chair Miyasato introduced this presentation and explained that since presentations on this item have been taking place regularly, it would not be an entire presentation. He aimed to create a cadence allowing the presenters' time to be appropriately utilized.

Mr. Nāho'opi'i introduced Ms. Lynn Whitehead, the Hawai'i Visitors' and Convention Bureau (HVCB) Vice President of Global Meetings, Conventions, and Incentive (MCI) Sales and Marketing, and Mr. Andrew Koh, the Executive Director of Asia and Oceania, who would lead discussions on the MCI and Pace report. They would also report on activities at the HCC and Meet Hawai'i local sales.

Ms. Whitehead expressed her pleasure at being part of the meeting. She stated that she would make complete reports on production and strategies every quarter during the January, March, July, and November meetings. In the "off months," she would present critical highlights of topics that arose during those months.

Ms. Whitehead explained that Meet Hawai'i was a collaboration between the HVCB and the HCC to showcase the State as a venue for meetings, conventions, and business. The HVCB was responsible for booking events scheduled more than 13 months ahead. These were offshore groups that would occupy significant numbers of room nights. Booked room nights contributed to economic impact by driving taxation revenue. The HVCB also contracted hotel meetings across the State. The Services Team focused on developing the contracted group program in the destination by connecting them to transport companies, offsite venues, the Convention Center, and overflow hotels and other facilities.

The HCC team focused on managing the building's operations. Ms. Whitehead explained that the HCC local sales team focused on events scheduled within the next 13 months, including festivals, marathons, and sports groups. The Event Management Team serviced groups inside the building, connecting clients to food and beverage providers and audiovisual and telecom facilities.

Ms. Whitehead informed committee members that, as had been explained over the previous two presentations, the State Department of Business, Economic Development and Tourism (DBEDT) had recently released a new review of spending for MCI business, which was estimated at more than one billion dollars in total spending to the State. Without corporate and business meetings, this amount would not have been achieved. Ms. Whitehead noted that these were 2023 figures which had just been published. Figures for 2024 will only be available in August 2024.



Meet Hawai'i contributed \$572 million to this economic impact in concert with the Citywide and Single-Property teams.

Ms. Whitehead presented a detailed report showing statistics divided into three categories: convention/conference, corporate meeting (including association and business), and incentive. There had been 401,000 visitors, representing an increase in Convention Center and incentive visitors. The average length of stay was 7.6 days since meeting participants usually attended the conference for 3–4 days and then added some 3–4 vacation days, often involving a visit to another island. Per person, per day spending had increased by \$15 to \$305 compared with the previous year. Ms. Whitehead noted that business was gradually returning to pre-pandemic levels.

Ms. Whitehead presented insights on visitor spending, which had increased by \$233 million compared with the previous year. Convention/conference business had reduced by 5%, but per person per day spending for that category had increased by \$33.6.

Meet Hawai'i had deployed a new Citywide sales team to cover the vertical market for Citywide events, and this was due to funding provided by the HTA early in 2024. This critical decision would likely bring positive results over the next six months.

Ms. Whitehead explained that the Single-Property position had been redeployed from O'ahu to California because the West Coast was an important market. This seller was focused on corporate and incentive business.

From a marketing standpoint, a digital messaging incentives campaign was to be launched during the present and the following quarter to remind meeting planners that Hawai'i was a key destination for incentive business.

Ms. Whitehead mentioned some measures still in the planning phase, including a follow-up from the July meeting to work on sports events. Through contacts at the San Diego Sports Commission, the team partnered with the Sports Events and Tourism Commission, which provided membership to sports groups dedicated to partnering with destinations. This commission tracked room nights and spending by event participants. Meet Hawai'i was committed to a strategy around the sports market and had a team member dedicated to this market.

Ms. Whitehead mentioned the concern about measuring the impact of local events on the local economy. Destinations International, which the HTA was a member, had developed an Event Impact Calculator tool. Ms. Whitehead had discussed this issue with Ms. Chun of the HTA, who intended to obtain measures of the impact of some local groups, and these would be shared with committee members during a subsequent meeting.

Ms. Whitehead referred to the Hawai'i Captive Insurance Council (HCIC). She pointed out that the insurance market segment was important for Meet Hawai'i and was entrenched in developing relations with this sector.

The HCIC was to meet in Kaua'i, and this was a local group based in the State whose meetings all fell within the State. The Captive Insurance Company was based in the Midwest, and Meet Hawai'i in that region was working to bring another group rotation to Hawai'i, hoping to finalize this during the next six months.

The Meet Hawai'i team was investigating new ways to present key performance indicators (KPIs) for Future Pace. They had asked fellow destination management organizations (DMOs) for suggestions to determine a better method of presenting targets and delivering them to the Board.

One of the highlights from July was a presentation to HPN, a third party focusing on corporate and association meetings. Thirty-five participants attended this presentation, which concentrated on Maui in the presence of the Maui Visitor Bureau, emphasizing the message that Maui was open for business.

The IEEE Convene took place in July, with 250 meeting planners representing over 30 countries participating. The Institute of Electrical and Electronics Engineers was a key market, and ten leads had been generated. One of them would hopefully be closed by the end of 2024 to bring 3,000 participants in 2028.

Ms. Whitehead explained that all MCI businesses contribute to corporate social responsibility. The IEEE Convene had benefited the Lahaina Restoration Foundation and Kapili Maui, and the team was waiting to hear how much had been raised. They hoped to develop a method of tracking and reporting community support.

The HCC hosted Indoor Air with double the attendance of the previous year. Kawaii Kon's repeat business was booked for 2025, representing \$19.8 million in economic impact.

The Mid-Western team had contracted the International Foundation of Employee Benefit Plans for a 2027 meeting. This Canadian organization had a \$12.9 million economic impact.

Ms. Whitehead explained that from 2027 onwards, about 19 groups were contracted in the Convention Center, and 33 tentative contracts were under consideration. She noted that production was somewhat behind, but she believed there would be an improvement during the next two months. Contracted groups through July 2024 involved 70,000 attendees, with 136,000 definite room nights. There was an economic impact of \$360 million between the Citywide and the Single-Property teams.

Ms. Whitehead introduced Mr. Andrew Koh, the Asia/Oceania team leader, who brought in much business and opportunities for members and island partners. Mr. Koh had been in

Hawai'i recently, but due to the typhoon, he would be presenting his report from his Tokyo hotel.

Mr. Koh thanked Ms. Whitehead for the introduction and said he would fly to Korea the following day to meet Mr. Nāho'opi'i and the Lieutenant Governor. They were to meet Korean agents and corporate representatives. Mr. Koh explained that he was responsible for overseeing the Asia Pacific market, including China, Taiwan, Southeast Asia, Japan, Korea, and Oceania. Mr. Koh had six team members, comprising in-market country directors for each market and a coordinator based in Taiwan. Mr. Koh was based in Taiwan and traveled extensively, especially to Japan, to build the MCI business. Japan was a key market and had the most potential to use the Convention Center.

Mr. Koh highlighted Asia/Oceania activities. Meet Hawai'i recently participated in DSA Connect Australia, which connected with corporate planners from several direct sales companies. More than 20 leads were generated from direct-selling corporate clients during this event.

Meet Hawai'i was to join the JTB Expo, which would expose the destination to about 1,000 sales agents within JTB to generate more leads.

Daito Kentaku was a Japanese construction company that held an event in Hawai'i in early August with 6,000 participants and 12,000 room nights. This was the most significant international MCI group to visit Hawai'i since the pandemic. The event generated \$35.5 million in economic impact and \$4.15 million in tax revenue for the State. There were three waves of gala dinners at the Convention Center, and the center manager, Ms. Orton, did a phenomenal job of satisfying the customers. The team was working with Daito Kentaku for 2025 and 2026. Construction would be taking place in 2026, but the team had approval from Ms. Orton to move ahead with the contract.

Mr. Koh informed committee members that more than 600 participants from the Daito Kentaku group had participated in a Mālama Plogging Event, in which they went out to pick up trash in Kapi'olani Park.

Ms. Whitehead explained that it would be possible to host Daito Kentaku in 2026 because it would be an evening event during which no construction would be in progress.

Mr. Koh showed pictures of the plogging event during which about 30 pounds of trash was collected between 6:30 and 7:30 a.m. He also showed a picture of Mr. Nāho'opi'i presenting a ceremonial canoe paddle to the President of Daito Kentaku in appreciation for their being such a loyal customer with a record number of participants.

A member of the Asia/Oceania team had been working with sports groups from New Zealand, including volleyball and rugby associations, with the potential to hold their events in Hawai'i. Results will be presented in subsequent meetings.

Meet Hawai'i had developed a strategic partnership with JTB under a Memorandum of Understanding (MOU) and was to participate in the September JATA Expo. Mr. Koh explained that JTB was the largest wholesaler in the Japanese market, controlling 60% of the corporate incentive market in Japan and handling most of the significant marquee mega business from Japan, which was 1,000 pax and above. The Marquee groups handled by JTB had the most significant potential to provide Citywide business for HCC and the State.

The strategic partnership was to take effect for two years and strengthen Hawai'i as the go-to destination for Japanese MICE (Corporate Incentive groups). The target was to secure the return of Marquee Mega Groups that had formerly come to Hawai'i but stopped due to the pandemic and the depreciation of the Yen.

Meet Hawai'i was to develop an internal Aloha program to train JTB staff to serve as Hawai'i ambassadors. Mr. Koh explained that there has been high turnover among JTB sales teams since the pandemic, and they need to be trained about Hawai'i's unique facilities and culture. The Mālama Plogging Event, created by HIS for Daito Kentaku, was an example of a creative event in Hawai'i.

Meet Hawai'i already had an MOU with HIS, the second-largest wholesaler in the Japanese market. The return of Daito Kentaku in 2024 was a perfect example of the MOU's success. The company had been considering other destinations, but with HIS's cooperation, it had returned to Hawai'i.

Mr. Koh explained that these two MOUs were partnerships with the largest wholesalers, controlling about 80% of the Japanese corporate incentive market.

Chair Miyasato thanked Ms. Whitehead and Mr. Koh and congratulated them on being so organized, ensuring that the meeting would be productive.

The Chair asked about collaboration between Hawai'i Tourism Japan (HTJ) and the HVCB since they appeared to operate in the same space. Mr. Koh replied that HVCB worked very closely with HTJ. For example, they collaborated on signing the MOU and the JATA event. He added that every March/April, a Japan summit was held in Hawai'i, where HVCB and HTJ collaborated. HTJ was responsible for inviting all the leisure sales agents to Hawai'i, and the HVCB was accountable for inviting corporate sales agents. The two agencies discussed markets together to obtain leverage and amplify their efforts.

Ms. Whitehead added that Meet Hawai'i was fortunate to have Mr. Koh's innovation. She thanked him for his presence at the meeting. Chair Miyasato pointed out that there was a synergy between the HVCB and Hawai'i Tourism USA (HTUSA) and between HVCB and HTJ. He asked whether there was any redundancy and whether resources were being effectively leveraged.

Ms. Whitehead explained that at the spring meeting, the HVCB collaborated with the global marketing teams (GMTs) that attended. Discussions occurred about how to deliver Fam visits for the travel trade. The two agencies shared core competencies, and Ms. Whitehead appreciated the round table organized by the HTA at the last meeting.

The Chair asked whether the benefits in one area offset the negative aspects of another area. Ms. Whitehead pointed out that diversification through a creative portfolio was essential. MCI was highlighted when leisure visits were down. The meetings business was the base business even though the leisure business gave a higher average daily rate (ADR). The MCI business had more exposure with partners, so Ms. Orton emphasized the importance of diverse groups at the Convention Center. Developing a market mix between local and offshore groups, including corporate events, was essential. Mr. Koh pointed out that the short-term, two-year market was necessary. There was a role for every type of market.

Mr. Nāho‘opi‘i added that the international market showed MCI leading in arrivals. This was important because it built up confidence, showing that it was safe to travel to Hawai‘i after the pandemic. There was still much to see and do, and word of mouth was important because people who had been to Hawai‘i on a business trip would recommend it to their friends. This had been helpful with the Japanese market, where many people were apprehensive about traveling to Hawai‘i.

Mr. Pfund asked about support for smaller groups from the Japanese market and whether these small corporate and incentive groups were being encouraged. However, he understood that Citywide groups provided the most significant economic impact.

Mr. Koh responded that this was their strategy, focusing on large Marquee Citywide groups and working with HIS on smaller groups, as Mr. Pfund had mentioned. This means that there were two directions of strategy.

Ms. Whitehead referred to the policy that all sellers were deployed towards in-house groups on all islands. There were four single-property sellers on the team. All the statistics resulted from a combination of Citywide and single-property events. This was the diversification to which the Chair had referred. For instance, during the Maui fires, the single-property team had been deployed to ensure that they remained in touch.

Regarding moving groups out of the Convention Center during construction, Ms. Whitehead stated that single-property sellers were using incentives to attract more business for that year. They were conscious of the need to cover all areas.

Mr. Arakawa referred to the issue of economic impact on page 8 of the report. He commented that he and Chair Miyasato had been discussing methods of measuring economic impact and assessing its circular nature. He asked Ms. Whitehead to briefly overview the revenue types recorded as having an economic impact.

Ms Whitehead responded that it was developed from the DBEDT statistics she presented. Economic impact related to the purpose, per-day spending, length of stay, and transportation. DBEDT developed this calculation tool to estimate the economic impact of every event when the relevant data was entered.

Mr. Arakawa stated that he and Chair Miyasato had asked DBEDT whether spending on local products could be tracked. Ms. Whitehead responded that local revenue was included in Destinations International's Economic Impact Calculator. Before the next meeting, she and Ms. Orton would collaborate with Ms. Chun to assess the impact of local groups.

Mr. Arakawa stated that during the next couple of months, there would be two large local events. One of them was Kawaii Kon, which was changing into a Citywide event. This event had previously been a local event. Ms. Whitehead responded that many single-property groups began in a smaller hotel, moved into a larger hotel, and finally moved into the Convention Center because they had outgrown the hotel. Kawaii Kon had become a Citywide event, and their room nights and spending would be tracked.

Mr. Arakawa stated that Kawaii Kon and the Okinawan Festival would allow local revenue to be tracked. Kawaii Kon would be included only if it contracted hotels. Local groups were not usually monitored or measured since most were from within the State. Offshore groups were different. The Economic Impact Calculator would enable Ms. Orton to evaluate the contribution of festivals and other local groups.

Chair Miyasato asked Ms. Whitehead to demonstrate the tool at the next Branding meeting so that committee members could identify the required inputs. Ms. Whitehead promised to collaborate with Ms. Chun on this since she was unfamiliar with everything that went into calculating economic impact. However, this would be the primary focus of the next meeting.

Mr. Nāho'opi'i promised to assist Ms. Whitehead because he was familiar with the calculator. He also noted that it would be essential to identify various definitions of the economic impact during a future meeting. It was sometimes defined as money flowing into the State, but by that definition, local events would be excluded because they did not bring money into the State from outside. However, there were other impacts, such as food, beverage, imports, etc. The calculator also included ancillary revenue such as shipping and drayage.

Chair Miyasato gave the example of the Okinawan Festival, which involved inter-island travel for participants, and stated that this must have an economic value. The Chair requested a brief summary of how the calculator works.

Mr. Arakawa asked whether the DBEDT calculator would account for food purchases from local vendors.

Mr. Arakawa referred to page 17 of Mr. Koh's report regarding the JTB partnership for the internal ambassador program. He asked who the trainers for this program would be. Mr. Koh responded that it would be a collaborative exercise with the HVCB and resources from the HTA. The program would highlight the cultural elements of the islands.

Mr. Arakawa replied that a training program for tour guides is currently being implemented. He asked about the strategic partnership with JTB. He suggested that in a subsequent meeting, information could be given regarding data collection about venues visited by groups, whether they enjoyed their visits, and where they would like to go in the future. The destination stewardship team would be involved in these issues.

Chair Miyasato stated these issues would be covered in the second to last agenda item.

Mr. Hannemann thanked Ms. Whitehead and Mr. Koh. Their report was critical because MCI was one aspect of the visitor industry that was doing well. He also thanked Ms. Whitehead for discussing sports, an area where the Hawai'i visitor industry could continue to grow.

Mr. Hannemann reminded Mr. Nāho'opi'i that staff could be asked to compile highlights of forthcoming festivals and events to be used during the saturation in Southern California. This would provide critical information for Gov. Green and the mayors who would be there.

Mr. Hannemann thanked Mr. Koh for explaining the Japanese market. Some people proposed postponing working with Japan until the Yen issue improved, but he disagreed. Mr. Hannemann referred to the success of Daiko Kentaku and the Tourism Expo meetings. He expressed the hope that success stories on neighboring islands would be included because it was important for other islands to benefit rather than focusing on Waikīkī and O'ahu.

Ms. Whitehead responded that Mr. Talwar had been informing them about the Southern California saturation to ensure that they would be included.

Mr. Koh informed members that the Yen was at its lowest point when Daiko Kentaku decided to go to Hawai'i. His team collaborated with JTB on the specifics of the MOU, and when this was complete, he presented it to the Board.

Chair Miyasato reminded committee members that the Japanese market was a long-term relationship, and the Board should provide resources. He thanked Ms. Whitehead and Mr. Koh for their productive and enlightening presentation.

## 5. Presentation, Discussion, and Action on Sports Opportunities for FY25

Mr. Nāho'opi'i began his presentation by referring to the presentation at the April meeting, which mentioned the potential for contracts. Now that funding has been awarded, this item would be a follow-up for approval, which means that spending from the budget line items could be executed. He noted that the information packet supplied to committee members provided additional details about events and the financing of 2024.

The presentation listed five major sporting events, budgeted costs, and line-item numbers. The total cost was \$3.6 million. The events included both signature events and community enrichment events.

The HTA staff recommended the employment of a sports consultant whose role would be to support the development of a revised sports strategy, to set up partnerships in alignment with the plan, and to support the fulfillment of the agreements that were entered into,

Mr. Nāho'opi'i reminded committee members that the function of the Branding Committee was to lead in protecting and enhancing Hawai'i's globally competitive brand in ways that would be coordinated, authentic, and market-appropriate. He pointed out that sports were a critical branding component because they increased awareness in critical markets through association with quality sports events, activities, and the fan base. Sport added to economic impact by attracting visitors to major sporting events. It was also crucial for diplomacy since it allowed visitors and residents to interact over common interests at significant and smaller community-based sporting events. Mr. Nāho'opi'i listed the following sports projects:

- LA Clippers event, scheduled for the end of September, funded by the sports opportunities fund line item,
- PGA Tour events for 2024 to be funded from the PGA line item,
- The LPGA Lotte Championship would take place later in November, funded by a specific line item,
- The World Surf League was to be funded from the sports activities line item.
- The Big West Tournament partnerships.

The final line was \$100,000 for a sports consultant.

The HTA staff recommended that the Board of Directors approve expenditures of \$3,605,850 from FY25 funds for the budget line items specified in the table.

Chair Miyasato asked Mr. Nāho'opi'i whether these events had previously been presented, and Mr. Nāho'opi'i confirmed that the only additional item was the contract for the Sports



Consultant position.

Mr. Arakawa asked whether the line items had already been defined in these amounts. Mr. Nāho'opi'i responded that the quantities for the PGA, the LPGA, and the Big West were the same. The World Surf League and the L.A. Clippers events had been reduced to \$300,000 and \$750,000, respectively. These events were funded from the Sports Opportunity line item, totaling \$1.65 million. Staff was requesting \$1.05 million to be used for the abovementioned events. Lastly, \$100,000 for the sports consultant was to be taken from the second sports opportunity and signature events line item, which totaled \$768,000.

Chair Miyasato asked if the sports consultant position had already been budgeted. Mr. Nāho'opi'i explained that the sports strategy was for a consultant to identify new major activities, produce a sports strategic plan, and devise measures and metrics. A staff person was still needed to work with the contracts, execute procurement with the procurement officer, and manage the contracts. Both positions were necessary.

Mr. Arakawa stated that he had the same question and thanked Mr. Nāho'opi'i for explaining the difference between the staff person and the consultant. He noted that the sports opportunity fund had been created for events that might occur during the year, like the L.A. Clippers and the World Surf events.

Mr. Nāho'opi'i explained that a long list of other proposals had come in over the past few months, and the consultant would help to negotiate these. The consultant would also identify new sports and work with venues to determine if facilities were available to bring in other sports.

Mr. Arakawa thanked Mr. Nāho'opi'i for this presentation and said he supported the motion with the caveat that the budget team would work on the details.

Mr. Hannemann proposed a motion for the Board of Directors to approve expenditures of \$3,605,850 from FY25 funds from the budget line items specified in the table for the programs noted above. Mr. Arakawa seconded the motion.

There was no further discussion. Mr. Nāho'opi'i conducted the roll call vote, and the motion was carried unanimously, with Mr. Arakawa's caveat that he accepted the motion because the legislature had passed the budget. Still, the details were to be reviewed by the budget and fiscal department.

## **6. Presentation and/or Discussion Regarding Destination Management Application and Relation to Branding and Marketing**

Mr. Nāho'opi'i introduced Mr. Tyler Gomes, the Chief Administrator of Kilohana.

Chair Miyasato pointed out that this was in the budget and had been approved by the legislature. His concern was to ensure that there would not be multiple applications and redundancy. He also thought it would be unwise not to review already funded applications to see how they worked. No new presentation was needed. He wished only to hear an explanation of what was being done.

Mr. Gomes gave some procedural background, stating that funds had been set aside for intelligent tourism when the project started. However, this was eventually honed down and has now created a white paper due by December 31st. The purpose of this white paper was to indicate directions for the development and implementation of the current app starting in 2025. The funds used to develop the white paper were separate from those appropriated by the legislature under the budget. Only about \$200,000 was to be used, and it was likely that a contractor would have been hired before September 1st.

It was intended to review all instances of legislative language relating to apps and tourism. Legislators were interested in ocean safety apps, and the goal was to combine all issues in a "wrap around." The first two or three months would be dedicated to research. Then, up to 100 interviews will be conducted with stakeholders, legislators, HTA Board members, key opinion leaders in the tourism industry, Hawai'i tourism industry groups, activities, hotels, and government agencies. Some government agencies managed reservation systems for hikes and trails. Experienced local contractors would conduct these interviews and create the application starting in 2025.

Chair Miyasato thanked Mr. Gomes and mentioned that, in his experience, it was essential to have an owner for this significant initiative. Many applications already existed, and given that this was to be funded from taxpayer dollars and that the constituency was so huge, this was an opportunity to do something. The Chair asked where this app was to be housed and who was to manage and own the app. He intended for the HTA to be the proprietor of the app. He also suggested that this discussion be recapitulated at the full Board meeting to initiate a robust conversation.

Mr. Gomes responded that he would be away on a prearranged vacation during the following week's Board meeting, but he would arrange for a team member to attend and brief Board members.

Chair Miyasato repeated that this was such a huge undertaking that the following week's meeting would only include discussion and no decisions.

## **7. Presentation, Discussion, and Action on Proposed Fiscal Year 2026 and 2027 Hawai'i Tourism Authority Operating Budget for Branding and Marketing (BED114) and Related Strategy and Planning**

Mr. Nāho'opi'i introduced the next item and stated that they would focus on the branding and marketing section of the total budget since the Budget, Finance, and Convention Center (BFCC) Standing Committee meeting was scheduled for the following day.

Chair Miyasato listed the principles that he wanted to submit for discussion:

Firstly, it should be agreed that since the Branding Standing Committee bears the major responsibility for the HTA's most important marketing and branding functions, budgets, plans, and strategies should be initiated in this committee. The Chair understood that the finance committee would review budget provisions the following day. However, plans and strategies should originate with the committee responsible for initiating them.

Mr. Arakawa stated that the process began with general guidance from the administration, but the HTA was free to develop its budget. Branding and marketing started with this committee, and destination stewardship and management started with the Ho'okahua committee. The proposals were then submitted to the budget committee to ensure they fit within the total agreed upon by the Board. There had to be give and take between the three links of the spool: Administration, Branding, and Destination Stewardship.

Mr. Arakawa explained that the entire Board would decide on the budget to be submitted to the administration and the legislature. The HTA and its staff might even testify to a higher budget than what had happened the previous year. He stated that the process the Chair had described was generally correct. The committee could discuss general principles that might apply as had been done in the budget committee.

Chair Miyasato stated that, given Mr. Hannemann and his team's miraculous achievement of obtaining \$63 million, it was essential to ask for what was needed based on a plan. In building the budget, the Chair wanted the circular economy to be considered so that whenever a dollar was spent, it would return to the State of Hawai'i and its people as two dollars. Everything had to be seen through a filter beginning and ending with the State of Hawai'i.

Finally, everything this committee did had to enhance the HTA brand. That was their kuleana. The Chair suggested that these principles should be used to build the budget.

Chair Miyasato reviewed how the HTA had arrived at this point. He noted that the budget was based on intelligence and feedback. He also stated that the budget had to be modified or changed before the following morning. It was essential to have a sense of direction.

Mr. Nāho'opi'i stated that the recommendations of this committee would be submitted to the Budget, Finance, and Convention Center (BFCC) committee meeting the following

afternoon. The budget committee would make recommendations, which would be submitted to the full Board at the next Board meeting. Mr. Arakawa reviewed the general principles that the BFCC committee had laid out in the form of questions:

- Is it our kuleana?
- Can another department or private company do it, as recommended by the governance study?
- Can we prioritize requests?
- Are there sufficient details, such as who, what, when, how, and do we have sufficient staff to handle this so that questions from the legislative Ways & Means and Finance committees can be answered?
- What is the current status of the State budget, and how do we operate within it?

Chair Miyasato responded that he assumed the entire Board would adopt these principles. His instant response to the last point was that while the HTA had to be concerned about the State, it was essential to realize that the State's problems were related to the lack of visitors to the State. Every businessperson was aware that money must be spent to generate money. It did not make sense to shortchange the tourism industry in the face of a crisis.

Mr. Arakawa responded that the state's approach to its financial situation involved spending money to make more money or tightening its belts, as other State departments had been asked to do.

Chair Miyasato asked Mr. Nāho'opi'i to continue his presentation. He presented the timeline slides entitled Budgeting for the Horizon to set the tone for each year.:

**FY25 Stabilize**

There was to be a focus on markets, particularly on recovering domestic demand affected by the Maui wildfire and some economic issues. The international market that was recovering from the pandemic was to be rebuilt. For example, Japanese travelers were apprehensive about travel in general, not just because of the exchange rate.

**FY26–27 Optimize**

The destination was to be the focus, with the development of island-based destination management comprising five island positions. New Destination Management Action Programs (DMAPs) would be developed for the next few years, along with integrating more island-based decision-making. This had been one of the recommendations of the governance study.

### **FY28–29 Realize**

There would be a focus on Hawai'i. Some work had to start at present. There would be a shift to a regenerative tourism model focusing on the circular economy. Some present tourism products were not like that, so it was necessary to consider how the industry, the community, and the brand could be shifted. At present, the Hawai'i brand is strong on sun, sea, and surf activities. It was necessary to consider how Hawai'i could become known for education, history, and other experiences that would contribute to local efforts and employ more local people.

Mr. Nāho'opi'i presented a slide entitled Leisure Marketing Funnel Kuleana, which portrayed branding and marketing from a destination perspective.

### **Hawaiian Islands Campaign – Awareness and Inspiration**

This was the bulk of what was done to maintain the Hawaiian Islands in people's consciousness.

### **Industry Partner Campaigns –Active Consideration**

This was aimed at the travel trade and other information sources. The island chapters were to create greater awareness and encourage people to do more research about available activities. Travel agent training would ensure that agents were aware of new products and updates that could be offered to the market.

### **Industry Partner Campaigns – Intent**

At this level, there was a conversion from consideration to intent. The marketing team was to work with partners to remind them to create offers that would obtain customers, such as the best value for a trip to Hawai'i, along with the costs of activities and tourism opportunities. Collaboration with partners would enable them to execute the conversion and create the bookings.

Mr. Nāho'opi'i reviewed the budget spreadsheet:

### **Canada**

Mr. Nāho'opi'i explained that each row showed a project or activity. The columns showed the budget for FY25, and the request for FY26 was shown in blue. Two amounts were shown for each line because a 10% restriction had been imposed on the FY25 budget. On paper, \$1 million had been allocated to Canada, but only \$900,000 could be used because of the 10% restriction imposed by the Budget and Finance Department. 5% might be returned later in the fiscal year, but the assumption was to plan for a budget of \$900,000.

Because of this, the request for FY26 would be increased by 10% to get back to the desired spending. The spreadsheet showed the change between FY25 and FY26, and the green column was to be discussed by BFCC the following day.

Mr. Nāho'opi'i explained that Canada was Hawai'i's third or second-largest market

after the U.S. East and West. This meant it was the first or second of the international markets. It was essential to emphasize Canada's development and stabilization, especially as Canada was one of the core markets for Maui, and building Maui back was a significant concern. Staff recommended a 10% increase because of rising costs; hence, the request was for \$1.2 million.

Mr. Nāho'opi'i explained that the yellow lines showed the incremental amounts that staff considered should be added. This applied particularly to the destination marketing section for specific actions involving cooperation with defined tie-ins and KPIs. Another \$100,000 was requested for the Canadian market to conduct specific tie-ins with travel trade and promotions. Partners would be informed that they would not receive their funds unless they put up matching funds and achieved specific minimum sales goals.

### **China**

Mr. Nāho'opi'i explained that there was a zero budget for FY25 even though marketing was taking place in China. This was because a three-year standing contract had been paid from the Tourism Special Fund in 2021. That contract was ending, and it would be necessary to use general funds to source a new contract.

The budget for China marketing was divided into two parts. The base was in-market, working with the travel trade in China. Some legislators and industry partners participated in a small mission. Typically, there would be no mission in a GSA item because that would be very costly.

Staff recommended that China's marketing be increased to a full representation in the market. Mr. Nāho'opi'i explained that the U.S. government was pushing to improve and increase relations with China. This included working with airlines and conducting additional marketing, so it was possible that by FY26, there could be a nonstop service. If not, the marketing team was already promoting a one-stop service through Narita with the idea that it would be successful and convenient for the Chinese market. For this reason, the request was for additional funds to bring the China budget up to \$1 million and develop a full-service representative in the market.

### **Europe**

Mr. Nāho'opi'i stated that \$1 million had currently been allocated, and he considered this adequate. Hawai'i had entered the European market recently and intended to take a mission there during the coming fall. There was no nonstop Service, but there was a one-stop service. Europe was a niche market for some industry partners. European travelers were big spenders and stayed longer because they usually had one month of holiday.

**Japan**

This critical market was still building to reach the pre-pandemic level. It was hoped that the budget would be increased by 10%. The incremental amount passed for FY25 was approved at the last Board meeting. Mr. Nāho'opi'i explained that, even at 10% for the base funding, there should still be coop funding to be put aside and used if opportunity were to arise, such as an additional route, an increase in frequency of service, or another MOU or partnership. The request was for a coop amount of 722,000, a 10% increase over the amount allocated at present.

**Korea**

Mr. Nāho'opi'i explained that there was a full-service representative office in Korea. The request was for an 11% budget increase. Rising advertising and marketing costs were expected to have cost implications for FY26. The request was for \$1.1 million.

Korea has been a very productive market. It had been one of the first Asian markets to open and start outbound travel. Air service from Korea was very stable, and it was served by Hawaiian Airlines and Korean Air. Air Premier was another airline that started service at the beginning of 2025. Mr. Nāho'opi'i was to travel to Korea with the Lieutenant Governor in a few days to discuss partners and potential for the Korean market.

**Oceania**

Mr. Nāho'opi'i explained that Australia and New Zealand were Hawai'i's fourth largest markets. This was a robust market because visitors stayed longer and spent within the range of the other Asian markets. This market needed more attention, but the proposed amount appeared sufficient. There was a need for more air service, but the demand for the destination had to be demonstrated. This is related to building interest in visiting Hawai'i rather than other destinations.

**Taiwan**

Mr. Nāho'opi'i explained that this was a low-priority line item. He suggested that it could be serviced as a GSA. This would be a representative office that would provide information without doing any marketing. This could be achieved through an office supported by DBEDT, which maintains an office in Taiwan. Regarding MCI, Taiwan has been performing well for a couple of years.

**The U.S. Market**

Staff had recommended that the budgeted amount should remain the same. It had increased by about 14% to make up some payments in the market. This 14% increase would represent a rise from \$16 million to \$19 million, including an increase in the second half of the financial year. Coop and in-market activations

were recommended, similar to those conducted in Southern California. Additional adjustments might be necessary across the West Coast and other source markets such as Chicago, Texas, and the East Coast. These modifications would help some U.S. West visitors. There was interest from both business and higher-end leisure and luxury travel, typically coming out of the U.S. East. \$6.6 million was requested for additional activation. Mr. Talwar had presented a basic activation of \$1.5 million in Los Angeles, and partners would supplement this. There was to be a larger activation in other markets.

### **Salaries**

Mr. Nāho'opi'i stated that basic salary increases, including current positions and payments, were recommended. Staff had recommended that one new brand manager be added since, under brand and marketing, there were only two senior brand managers and one brand manager in addition to the Chief Branding Officer. This meant that only four positions were responsible for expanding markets and markets as well as managing island chapter programs. These staff also managed Meet Hawai'i, whose activities had been growing, necessitating reviews of many contracts and agreements. The recommended new position would be allocated \$86,000.

### **Travel missions**

Mr. Nāho'opi'i explained that this involved attending trade missions and trade shows, which often included training. The total budget was \$100,000.

### **Air route development**

This was a low-priority item. The previous year, \$250,000 had been requested for a consultant to develop a strategic plan and selling points. The consultant would determine how to communicate demand in Hawai'i and work with the airlines. Mr. Eslinger had been conducting this function part-time under the GSS contract. The consultant to be hired would possess established relationships with airlines since they would be negotiating for other destinations and would be aware of the expectations of each airline. The request was for \$250,000 per year to work with Mr. Eslinger to support his research. Mr. Nāho'opi'i explained that if the consultant's work, such as attendance at events and expos, overlapped with Mr. Eslinger's work, the consultant's work would be reduced. He would also be expected to train staff to carry out this work.

### **Cruise consultancy**

The request for a cruise consultant, \$100,000, was the same as the previous year.

### **Global Support Services**

Mr. Nāho'opi'i reminded committee members of the presentation by staff at the



previous meeting. The details showed that the increased budget was due to the request to upgrade the GoHawaii website. Website optimization would require \$500,000. An amount of \$150,000 had already been allocated to upgrade assets. This referred to shared digital material such as photos and videos. These would not only be used by the U.S. marketing team but would also be used by other global marketing teams. This amount would not be requested for FY26 but would be requested for FY27, being required every other year. The digital market had changed, and videos were more critical. In reply to a question from the Chair, Mr. Nāho'opi'i confirmed that this also referred to trade show assets.

Mr. Nāho'opi'i explained that the island destination chapters supported the office, the Executive Director, and staffing. The five positions for destination managers would be housed in those same offices. The request was for the same level of funding with a 10% increase to cover staffing cost increases.

#### **Trade shows**

Mr. Nāho'opi'i stated that there were two major international trade shows. IPW was an international trade show organized by the U.S. Travel Association. IMEX was a major annual meeting and convention trade show in Los Angeles. He explained that the IMEX booth needed to be renovated since its limited size meant that additional partners could not be included. The HTA booth was less compelling than those of the other major destinations. The previous year, IPW had attracted much more participation from other countries, and it was important for Hawai'i to stand out compared with other destinations. The request was for \$1 million, representing an increase of \$555,000.

Mr. Nāho'opi'i continued that the Meet Hawai'i budget would be flat, and discussions were taking place with Mr. Kishi to determine whether funds would remain.

#### **Marketing ground support**

Mr. Nāho'opi'i stated that the final request was for marketing ground support, which could be used for coop projects in areas not already mentioned, such as Taiwan or Oceania. The request was for \$550,000. If coop partners were unavailable, the funds would be spent on advertising.

Chair Miyasato asked for the amount of the increase compared with the previous year and reminded committee members that if there was to be a 10% margin, then the 10% had to be inserted from the start.

Mr. Nāho'opi'i replied that there was a 38% increase over the budget for FY25, including some expanding markets and the 10% margin. Regarding the opportunity activation saturation coop, the legislature had to understand that it was an activity to be conducted

with a partner, from which the investment would return to Hawai'i. He added that budget line items would identify all budget areas.

Chair Miyasato asked for questions from committee members.

Mr. Hannemann stated that having been in two-by-two discussion meetings, he realized that there was never enough money. There would be feedback that the budget requests were too low. However, he considered that this was a good starting point for further discussions. The legislature had come through with a budget for FY25. but the 10% reduction had to be factored in.

Mr. Hannemann continued that 80% of Hawai'i travelers were from the USA, and U.S. marketing took up nearly \$20 million. He appreciated that the private sector was being asked to demonstrate what they were doing on their part. This could be the template for all marketing campaigns, so the \$6 million allocated was good.

Mr. Hannemann recalled that trade show partners had complained that the Hawai'i booth was not good enough. He considered that \$500,000 for IPW and IMEX stated that Hawai'i was conducting a strong messaging campaign. He also appreciated that there were still opportunities for further investment since Mr. Nāho'opi'i had identified leftover funds.

Mr. Hannemann hoped that staff would do more to develop the airline routes. The budget requested two places: consultant studies and approval for a route with marketing support. As Mr. Nāho'opi'i had explained regarding Taiwan, DBEDT and the Department of Transportation (DOT) were concerned with air transport, and it was necessary to determine if DBEDT still maintained an office in Taiwan. If so, there could be collaboration. He stated that there was a similar issue with airline consultants. Hotels would suffer without sufficient air capacity.

Mr. Hannemann agreed with the budget and hoped for more. Requests needed to be reasonable, but if the State hoped to increase revenues, only the tourism industry could achieve that. It was essential to show a robust budget that would demonstrate to partners that the HTA was doing its part. He believed that the legislature would appreciate a justified and robust budget line.

Chair Miyasato pointed out that, for airlines, coop meant leveraging relationships for the state's benefit. Airlines conducted their promotions, but the visitor industry needed seats.

When Mr. Arakawa asked about the total amount allocated for Branding and Marketing, Mr. Nāho'opi'i replied that the total amount for FY26 was \$54.5 million, compared with \$39.3 million for FY25.

Mr. Arakawa pointed out that the amount requested for Ho'okahua or administration was unknown. He asked Mr. Nāho'opi'i about prioritizing this budget, and Mr. Nāho'opi'i replied that the spreadsheet showed a priority column that could be discussed offline. During the

meeting of the BFCC committee the previous week, staff had been asked to prioritize budget items so that if cuts were demanded by DBEDT, the Governor, or the legislature, the most important items would be maintained. Mr. Arakawa offered to collaborate with Chair Miyasato and staff to prioritize items.

Mr. Arakawa referred to Chair Miyasato's comment about partnering. This was discussed at the meeting of the BFCC committee, and Ms. Agas referred to industry partnerships that might be available. Chair Miyasato had also mentioned this, but it appeared that partnerships were described as optimization. Mr. Arakawa noted that there seemed to be an increase in the budget based on partnerships, not a decrease or a leveraging of money spent by private industry. He asked Mr. Nāho'opi'i whether more funds were being spent on partnerships.

Mr. Nāho'opi'i responded that partnerships represented an increase in money but also an increase in utilization.

Mr. Arakawa asked how these partnerships were divided, whether 95:5 or 50:50.

Mr. Nāho'opi'i replied that it depended on the activity, but it was never less than 1:1 in the HTA's favor. Mr. Arakawa asked Mr. Nāho'opi'i to insert an asterisk against these items.

Chair Miyasato stated that a committee appeared necessary to decide where these decisions were made. He asked whether protocols should be written to define a coop. There was a structure around these issues. He pointed out that the Come Home Hawai'i initiative would never happen unless committee decisions planned for it.

Mr. Arakawa reminded committee members that the committee had to recommend a Board decision. He asked Mr. Nāho'opi'i to insert notes on the right-hand side of the spreadsheet showing the ratio of input between partners. Key performance indicators (KPIs) and return on investment (ROI) had to be defined such that if these were not achieved, the partnership would be readjusted the following year.

Mr. Nāho'opi'i responded that some coops had a built-in ROI, and if the partner did not fulfill the KPIs, the full amount would not be invested.

Mr. Arakawa referred to Mr. Hannemann's point about DBEDT and DOT. Mr. Arakawa had volunteered to participate in planning the HTA conference in September, partly because the HTA partners DBEDT and DOT had not been invited to prior conferences. He understood that DOT had not been invited but did not know whether a DBEDT representative had been invited to speak at the present year's conference. Mr. Hannemann had mentioned that airline routes had to collaborate with DBEDT and DOT, and Mr. Arakawa asked Mr. Nāho'opi'i to make a note so that the topic could be discussed offline.

Mr. Nāho'opi'i responded that he had followed up with DBEDT and DOT and would discuss the issue with Mr. Arakawa offline.

Mr. Pfund commented that it was essential to keep the budget as it was at present and work through it. An issue previously mentioned was how to generate information to show the importance of the industry. It was necessary to discover how much revenue was generated by visitors and how much of the revenue went into supporting local small businesses. Mr. Pfund noted that it was essential to work with people who could help demonstrate the importance of the industry to the State by producing detailed information for the administration and the legislature. This information would justify investment in the industry. Mr. Pfund commented that the funds invested in tourism were small compared with the amount generated by the industry. The Board needed to accurately represent the amount of money generated and how it flowed through the economy.

Chair Miyazato informed committee members that revisions would be passed onto the BFCC committee before the following morning.

Mr. Pfund proposed a motion that the committee should recommend approval of the budget as shown. Mr. Hannemann seconded the motion.

Mr. Arakawa stated that he would vote Aye with reservations. He understood that this would bring the total up to \$90 million. He noted that DBEDT research indicated a revenue shortfall due to the economic downturn, the downturn in tourism, the reduction in income tax voted by the 2024 legislature, and the wildfire. DBEDT expected a very lean FY26, and departments would be lucky to receive the same funding. The Budget and Finance Department was to send out a memo within the next three weeks.

Based on this information from DBEDT, the BFCC committee had recommended a budget of \$70 million and asked the HTA staff to suggest cuts to bring the FY26 budget down to this figure. Mr. Arakawa mentioned that he had already laid out five principles in this meeting and would not repeat them. Staff had been given a deadline of August 15 to get back to the BFCC committee. Mr. Arakawa, VP Choy, and Mr. Kishi had prepared a \$70 million budget just in case.

Mr. Arakawa would vote in favor of the motion because some items in the \$70 million budget were identical and consistent with the view of the BFCC committee. For amounts above \$70 million, the HTA staff could provide a prioritized list in case the administration or the legislature demanded a budget cap. A list would be ready to identify items to be cut. Chair Miyasato responded that continuing to build a budget without input from subject committees was to invite dysfunction. He asked why Mr. Arakawa, VP Choy, Mr. Kishi, and DBEDT had devised a budget for branding and marketing when the Branding committee had not yet met. He had just been told that the following day was the deadline for revisions.

Mr. Arakawa explained that the deadline he had mentioned was for staff to make suggestions. Standing committees had been asked to meet before the budget committee

meeting. Staff had not contributed suggestions about branding to cut the budget down to \$70 million.

Mr. Nāho'opi'i responded that the staff had met on the specified day and identified lines that could be modified. The committee Chair had instructed him to leave everything in and allow the committee to make the final decision. The lines shown in yellow on the spreadsheet could be removed to bring the total down to \$70 million.

Chair Miyasato informed committee members that voting was for the left alone spreadsheet, including the yellow lines. Mr. Arakawa apologized for leaving Chair Miyasato out of the process and explained that it had never been the intention for one, two, or three people to make the budget. It was intended for committee and staff input.

Chair Miyasato stated that the vote was on the budget presented.

Ms. Agas pointed out that there was no manual on being a Board member. Complaints had been made on several occasions that the HTA never filed their budgets promptly, and many warnings had been given. Instructions had been provided in the March/April meeting that work on the budget should begin. Chair Miyasato was correct in stating that there should be time for discussions. Guidance had been given, and members who were in business all knew about the economy. In their businesses, they all built very conservative budgets.

Ms. Agas suggested developing a prioritized list with recommendations to submit a budget similar to the present year. Like Mr. Arakawa, she would approve submitting the budget as long as it was prioritized. The BFCC committee knew that the staff understood the budget better than anyone, so they asked the staff to prioritize. Ms. Agas appeals that budget deadlines should be complied with. She did not believe that everything requested would be allocated but considered that it was necessary to adhere to the timeline to avoid warnings.

Chair Miyasato agreed with Ms. Agas that prioritizing could come later. At present, the issue is whether the budget will be submitted to DBEDT on time. The budget should be passed on to the BFCC committee the following day.

Mr. Hannemann responded to Ms. Agas' comment by stating that he did not wish to be delinquent by failing to respect deadlines. He had submitted to a two-by-two review, which was an opportunity to submit comments. The next step was submitting the budget to the administration, who would likely cut it. Still, the Board had to do its best to prioritize the list, whether it was Ho'okahua or personnel or consultants. Ultimately, the legislature would examine the budget and either cut or add. He agreed with Ms. Agas that it was essential to be compliant while advocating for the number one industry of Hawai'i.

Chair Miyasato commented that he did not understand why two-by-two meetings were necessary and did not feel they were productive. He called for a vote on the motion.

Mr. Nāho'opi'i conducted the roll call vote. As stated, the motion was carried unanimously with reservations from Mr. Arakawa.

**8. Adjournment**

The meeting was adjourned at 5:07 p.m.

Respectfully submitted,

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

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Sheillane Reyes  
Recorder



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**BRANDING STANDING COMMITTEE MEETING  
HAWAII TOURISM AUTHORITY  
Monday, September 9, 2024, at 1:00 p.m.**

**Virtual Meeting**

**MINUTES OF THE BRANDING STANDING COMMITTEE MEETING**

**MEMBERS PRESENT:**

Blaine Miyasato (Chair), Kimberly Agas,  
David Arakawa, Mufi Hannemann, James  
McCully, Roy Pfund

**HTA STAFF PRESENT:**

Daniel Nāho'opi'i, Kalani Ka'anā'anā, Talon  
Kishi, Caroline Anderson, Iwalani Kūali'i  
Kaho'ohanohano, Trishia Mendoza

**LEGAL COUNSEL:**

John Cole

**1. Call to Order**

Chair Miyasato called the meeting to order at 1:04 p.m.

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

Ms. Kaho'ohanohano did the roll call, and members were confirmed in attendance by themselves.

**3. Opening Protocol**

Mr. Nāho'opi'i did the opening cultural protocol.

**4. Presentation, Discussion, and Decision on the Proposed Final Draft of the Fiscal Year 2026 and 2027 Hawai'i Tourism Authority Operating Budget for Branding and Marketing (BED114)**

Chair Miyasato introduced Mr. Nāho'opi'i, who would present the proposed branding and marketing budget. The Chair noted that multiple meetings had been held, and everyone present had received copies of the worksheets prepared during the previous meeting. The

present meeting was to consider changes from the set of budget line items that had been presented during the previous Board meeting.

Mr. Nāho'opi'i explained that the overall aim of the revisions had been to ensure that they addressed both present and anticipated needs in two years' time. All figures had been adjusted for inflation, and some contracts had been reviewed. He noted that this was the time when 2025 Brand Marketing Plans (BMPs) were submitted by contractors, outlining the specific activities that they planned. Presentations would be made at the subsequent Branding Standing Committee meeting in two weeks' time. Staff had reviewed some activities and their costs and, along with their recommendations, had made minor amendments to the amount of funds requested based on activities that were less effective at the present time.

Mr. Nāho'opi'i pointed out that Mr. Arakawa had asked staff to rank the priorities of the projects in Supplementals 1 and 2 and projects that were to be included in the base budget of \$70 million. Staff had also worked on the areas of destination stewardship, planning, and communications, as well as branding and marketing. All areas had now been integrated into the priority list. In some cases, funds had been traded off in one area for a higher priority in another area, but the total had remained the same.

He stated that the budget and finance presentation at the Board meeting suggested that the budget to be presented to the Governor and the administration would be a base budget of \$63 million. Mr. Nāho'opi'i pointed out that this would be a problem since the Budget, Finance, and Convention Center (BFCC) Standing Committee had recommended a budget of \$70 million.

Mr. Nāho'opi'i explained that the staff as a whole had recommended the implementation of the 10% restriction, which had been imposed during the current year, so that instead of identifying specific programs to cut, the 10% restriction would be applied again, implying the postponement of some projects. However, staff felt that this was a necessary decision.

Chair Miyasato asked whether factoring in the 10% restriction would solve the problem, and Mr. Nāho'opi'i responded positively.

Mr. Nāho'opi'i added that with a \$70 million budget request, there would still be \$63 million to work with if the 10% restriction were implemented. The budget had been \$63 million in the present year, of which 10% had been deducted.

Chair Miyasato responded that there was a plan to drive the branding and marketing budget requests by adding 10% to the \$63 million to reach \$69.9 million. This meant that, on the one hand, the HTA would have \$7 million more than the previous year, but on the other hand, they would not have \$70 million.



Mr. Nāho'opi'i agreed that this was true. He explained that adjustments had been made between FY25 and FY26 because some programs had expired. An example was Meet Hawai'i. The budget request for Oceania had decreased because not all of the budget would be needed during the coming year.

Mr. Pfund referred back to the previous meeting and asked whether the intention was to prioritize some programs because there was insufficient approval on the total funding. He understood this was a biennial budget for the next two fiscal years. He had understood that \$80 million was to be requested with proposals for layered reductions. He asked whether the budget request would be reduced from \$80 million to \$70 million.

Chair Miyasato responded that this was a good question, but the answer had not yet been formulated, hence the meeting. He stated that everything revolved around Dir. Salaveria's instruction that Form A should be submitted at the end of September. This meant that the deadline for staff to fine-tune the budget would be September 15. The terminology was "base budget" and "incremental or Supplemental 1 and 2." Supplemental 1 comprised an additional \$10 million, but no conclusion had been reached about the base budget. The committee was to discuss whether the base budget would include the \$10 million or whether the \$10 million would remain as Supplemental 1 and 2.

Mr. Nāho'opi'i responded that they would present the total amount, and after presenting the \$70 million budget, they would discuss the \$80 million budget, which was \$10 million more and included priority projects. The next incremental will also be presented during the meeting.

Chair Miyasato thanked Mr. Pfund for his observation. Dir. Salaveria had been enlightening on the reasons for the budget shortfall. However, the only agency that could bring revenue into the State was the HTA, which had to be a factor in the budget preparation.

Mr. Arakawa asked Mr. Nāho'opi'i whether the administration had placed a 10% restriction on the \$63 million budget for FY25. It was important for Chair Miyasato to know that although \$63 million had been allocated, that amount was \$56.7 million. Requesting \$70 million was a larger amount than the current budget.

Chair Miyasato asked Mr. Arakawa if this was to come from the 10% "haircut," Mr. Arakawa replied that the HTA was "taking a haircut" at present.

Chair Miyasato noted that for FY26/27, the recurring budget had been \$63 million, but \$69.9 million was to be requested. He had been told that this was because of the expected 10% restriction.

Mr. Arakawa responded that Mr. Nāho'opi'i would also be able to explain, but effectively, the HTA did not have \$63 million to spend during the current year; it was about \$54 million or \$56 million. Mr. Nāho'opi'i confirmed that this was the case. Mr. Arakawa continued that

if the HTA requested \$70 million and had a 10% withholding, it would be possible to obtain a larger amount in subsequent years.

Chair Miyasato replied that he understood and that this explained the origin of the “magic number” of \$69.9 million. Still, he pointed out that the \$70 million was not really \$70 million but the \$63 million of the recurring budget.

Mr. Arakawa reminded the Chair that the recurring \$63 million was actually \$54 million.

Chair Miyasato stated that if the HTA requested \$69.9 million for FY26/27, they would have \$63 million to operate.

Mr. Nāho‘opi‘i pointed out that, as yet, the actual memo for the restriction had not been received. The Department of Business, Economic Development, and Tourism (DBEDT) has not yet received the memo. Dir. Salaveria informed the Board that the restriction had not yet been imposed, but based on prior experience, there would be a 10% restriction. Secondly, Mr. Nāho‘opi‘i stated that during the subsequent meeting on September 18, there would be brand management plan presentations by each of the marketing contractors, who would show where the 5% or 10% restriction would be deducted.

Chair Miyasato stated that FY26/27 should be level-set for branding and marketing as well as the availability of resources. He noted that the \$63 million was encumbered because it consisted of contracts. He pointed out that nothing was new there.

Mr. Nāho‘opi‘i explained that in the base budget for branding and marketing, the bulk of the first six months of FY26 comprised contracts for all the major programs except for the China program, whose contract had expired. During the second half of FY26, there will be options to renew most of the major contracts. Staff had estimated that these would either be at the same cost or could be options to renew. If the staff were aware of increases in the in-market costs, they would factored these in for FY26.

Chair Miyasato responded that, in effect, there was nothing new here for branding and marketing because nearly all were committed via contracts. Mr. Nāho‘opi‘i confirmed that this was true in the majority of cases.

Mr. Nāho‘opi‘i stated that the second item for discussion was the development of the FY26 budget by, where possible, seeking ways to create efficiencies or economies. This could be done by taking a program in-house or developing programs running across multiple project levels. He would discuss this at the HTA tourism conference.

An example was Brand USA, which was the national marketing arm. Brand USA had some programs that could be inserted into multiple markets simultaneously, such as international law, international travel agent training programs, or their broad national website. Mr. Nāho‘opi‘i explained that staff would consider how Brand USA could help the HTA be more efficient in the international market.

Mr. Nāho‘opi‘i explained that Brand USA also offered savings in matching funds, although that might not sufficiently decrease the total project amount for a particular market. However, it might enable the HTA to achieve more by partnering with other markets or setting up cooperative projects with other industry partners. This would allow the HTA to achieve more with the same line-item amount.

Chair Miyasato stated that he was trying to “connect the dots” regarding Mr. Pfund’s budget suggestion and the robust conversation at the previous meeting about the importance of a plan and a strategy to build the budget. This related to his question about the \$63 million since it was mainly earmarked via contracts. This also related to the importance of building capacity within the HTA and reinforced the general feeling of the committee that being incremental or supplemental might not be the right approach, given that the baseline for FY26/27 was \$63 million. The Chair felt it was important to be more aggressive because spending money was the only way to make money within the tourism space. A plan was needed to do this, and at the moment, all the strategic programs have been placed in Supplementary 1.

Mr. Nāho‘opi‘i agreed with this statement.

Chair Miyasato believed that the priority should be to ask for the needed funds.

Mr. Arakawa repeated that the budget for the present year was more like \$55 million than \$63 million, so the continual reference to the budget request being the same amount as previously was false. He had to state this.

He pointed out that the HTA could ask for whatever they liked. Still, the two people who had given the Board advice were the people who would determine the amount to be submitted to the Governor, and the Governor would make the final decision. The HTA could ignore the advice and ask for any amount they chose, but finally, they would take their chances. The BFCC committee had tried to ensure that there would be prioritization. Vice-Chair Agas had pointed out that it was important to prioritize the request so that the administration would know what was important. However, the people in charge would cut whatever was requested.

Mr. Arakawa finally reminded staff that this was not the “same old, same old.” Every time Mr. Nāho‘opi‘i tried to answer questions, this budget was portrayed as “same old, same old,” but it was not the same. Mr. Arakawa commended the staff for their work on this budget. The staff tried to make the budget innovative and efficient, aiming to achieve more with less and do new things. It was a disservice to the HTA staff to continue to say the budget was the same because it was not, and the staff had worked hard.

The BFCC committee commended the administration, destination stewardship, branding, and planning staff for working together collectively to devise a budget along with a

Supplemental 1 of \$10 million and a Supplemental 2, which could have reached \$10 million. Mr. Arakawa congratulated Mr. Nāho'opi'i and the HTA staff.

[Chair Miyasato had to step out briefly.]

Mr. Hannemann asked Mr. Nāho'opi'i about the \$63 million with a "haircut," giving \$57 million. He asked for details of how much was due to inflation, rising costs, and personnel, and then how much would be left over for destination marketing and management out of the \$57 million.

Mr. Nāho'opi'i responded that for personnel, the average was from 3% to 7% depending on certain bargaining units and internal salaries. For marketing contracts, there was about a 3–5% increase in personnel and rising advertising and media costs. In some markets, it had risen to 10%. Staff had considered these when calculating the actual request, including the \$10 million in Supplemental 1.

Mr. Hannemann asked how much would remain to increase marketing and destination management, which was \$13 million.

Mr. Nāho'opi'i responded that it would be about \$6 million. Mr. Kishi added that the other \$6 million was about 10% and promised to make an analysis.

Mr. Hannemann repeated his question, and Mr. Nāho'opi'i replied that a 10% increase was about \$7 million, and out of the \$13 million, that left \$6 million. Mr. Kishi added that part of the increase in costs was the salaries and costs of the HTA.

Mr. Nāho'opi'i explained that staff had been considering innovative programs, but on the marketing side, the only cost increases were for Meetings, Conventions, and Incentives (MCI) and Meet Hawai'i. The U.S. MMA also had rising advertising costs. Nothing else had increased in the base budget for marketing and branding. Every other increase was in Supplemental 1.

Mr. Hannemann asked how much of the \$70 million budget was due to increases in the California market, which was the most important sector of the domestic market. He also asked how much the \$80 million budget would be increased and what had been left out that staff believed was essential.

Mr. Hannemann wanted to find out which specific programs were to be left out. He had received a memo from the Chair of the Senate Ways & Means Committee, Senator Dela Cruz, who had been responsible for the HTA budget for the present year, increasing from \$60 million to \$63 million. This memo stated that DBEDT should not shortchange resources for its attached agencies, which could provide opportunities for growth for local industries. The budget request should be strategic and purposeful to grow Hawai'i's economy. Mr. Hannemann reminded Mr. Nāho'opi'i that he had received the memo and asked what actions he was taking so that the HTA could submit a budget to DBEDT that would satisfy

the memo's writer. The HTA had been asked not to hesitate to ask for more funds. Mr. Pfund seemed to ask if the HTA could settle for \$70 million. Everybody agreed that growth was important.

Mr. Nāho'opi'i responded that that would be his next presentation.

Mr. Hannemann stated that he did not want to hear any more about \$70 million. Tourism was the only industry taking off, even though it was not yet at its previous level. Construction neither provided the jobs that tourism did nor brought in the dollars that tourism did. He complained that he seemed to be getting two messages. He asked Mr. Nāho'opi'i to say whether the HTA needed more money. Sen. Dela Cruz had asked the HTA to help grow the economy. Dir. Salaveria had said, "Don't hesitate to ask for what you need." Mr. Hannemann reminded committee members that destination management had just been codified, and this meant that the HTA was expected to develop programs and not just hire five people for the payroll.

Mr. Hannemann stated that if the budget was driven by staff and the staff had produced a \$70 million budget, committee members should be informed.

Mr. Arakawa responded that the HTA was not settling for \$70 million; they were asking for \$10 million more in Supplemental 1 and up to \$5 million more in Supplemental 2, which had no limit. The budget request could go up to \$90 million.

Mr. Hannemann stated that it had been laid out that option 1 = \$70 million, option 2 = \$80 million, option 3 = \$90 million. Mr. Arakawa responded that it all went in together.

Mr. Hannemann replied that he understood, but he would like this committee to choose between the three options, with an emphasis on marketing. The committee should state which should be their priority. He understood that it seemed that \$70 million was the first choice and asked whether the staff supported it. He believed that the HTA should request \$80 million with the support of the Ways & Means Committee Chair. \$80 million would create growth in the economy.

Chair Miyasato agreed, and a reduction of 10% was germane to what the HTA had been contracted to do. It would be difficult to create economic growth with whatever had been left when the encumbered portion was removed. A budget of \$70 million had not been agreed to at the previous meeting, which was the reason for the present meeting.

Mr. Pfund asked for clarification of Mr. Arakawa's comments about the budget not being the same. It was important to obtain a perspective of how the HTA would help the State to improve the economy. He asked whether Mr. Nāho'opi'i and the staff could provide some hard numbers like those mentioned by Dir. Salaveria. For instance, what contributed to transient accommodations tax (TAT) or general revenues, such as the fees and other payments that the industry generated for the State? Mr. Pfund had examined previous

budget submissions to the administration, mentioning about \$20 billion in expenditures but not referring to flow-through second and third layers. Mr. Pfund believed that the HTA should make a new budget request. Not everyone was aware of the economic impact and revenue of the tourism industry. It was important to obtain figures about the visitor industry's activities.

Chair Miyasato thanked Mr. Pfund and referred to Dir. Salaveria's presentation mentioned waiting for the projections of revenues to come in and looking at the shortfalls in collections. The Chair asked what percent of contributions those taxes and fees represented as part of the assessment of revenue collection. The HTA was the only agency that had a chance of increasing revenue for the State. This would underscore that the shortfall was x% in tourism, and the only way to address this was by branding and marketing.

Mr. Ka'anā'anā echoed this comment and agreed that all the staff understood the need to do everything possible to create economic growth, given the present market softness. However, if efforts were to be made to send revenues to their previous levels, stewardship had to take place simultaneously, which also took money. As the volume of visitors increased and revenue increased, linking this to stewardship requirements was necessary. In the context of \$70 million, \$80 million, or \$90 million, he hoped that stewardship would take place to mitigate the impact on the community.

Mr. Nāho'opi'i presented the budget spreadsheet showing the critical programs that staff felt were essential. The base budget of \$70 million did not include any programs required to stabilize the U.S. and Canada base market or reinvigorate the international market, especially Japan. These programs had been transferred to Supplemental 1. If revenue were to be increased, these additional funding recommendations would have to be supported.

Mr. Nāho'opi'i added that U.S. MMA would need \$4.4 million to allow at least two more major in-market activations like the one in Los Angeles, either in FY25 or FY26. This budget would drive specific cooperative programs for short-term recovery, and the collaborative partners would not be paid unless they provided revenue.

He indicated an additional \$722,000 in the Japan market, which was also aimed at short-term recovery programs. Staff were to collaborate with wholesalers, airlines, and online travel agents to encourage quick commitments to address the issues of inflation and the exchange rate in the Japan market, along with additional pay for upgrading and credit card points. Added components would drive additional travel to Hawai'i, especially package travel.

Mr. Nāho'opi'i requested that the committee go into Executive Session because he would be giving contract details.

Attorney. Cole stated that committee members must vote to approve the Executive Session.

Mr. Arakawa proposed a motion to go into Executive Session. Mr. Pfund seconded the motion. Mr. Arakawa explained that the Executive Session was necessary because there would be a discussion about specific contracts for which there was competition.

Ms. Kaho'ohanohano conducted the roll call vote, and the motion was carried unanimously.

[Executive Session]

Chair Miyasato proposed the motion that the Branding Standing Committee recommend to the BFCC Standing Committee approval of the FY26/27 budget for \$80 million.

Mr. Arakawa commented that the \$80 million appeared to cover matters outside the *kuleana* of the Branding Standing Committee. Chair Miyasato asked for the actual figure for branding and marketing to be substituted in the motion.

Mr. Nāho'opi'i stated that Supplemental 1 was \$6.4 million for branding and marketing. The total for branding and marketing, including Supplemental 1, was \$49.3 million.

Chair Miyasato proposed the motion that the Branding Standing Committee recommend to the BFCC Standing Committee approval of the FY26/27 HTA operating budget for branding and marketing for a total amount of \$49.3 million. Mr. Hannemann seconded the motion.

Mr. Pfund commented that this related only to one year, and Mr. Nāho'opi'i agreed that it concerned FY26. The budget for FY27 was to be \$53.1 million.

The motion was amended as follows:

The Branding Standing Committee recommends to the BFCC Standing Committee approval of the FY2026 and 2027 HTA Operating Budget for branding and marketing for a total amount of \$49.3 million (FY26) and \$53.1 million (FY27).

Mr. Hannemann seconded the motion.

Ms. Kaho'ohanohano conducted the vote, and responses were as follows:

Chair Miyasato Aye,  
Vice-Chair Agas Aye with reservations that Mr. Arakawa would also get clarity on supplemental information,  
Mr. Arakawa Nay because he believed the original budget was justified,  
Mr. Pfund Aye,  
Mr. Hann Aye.

The motion was carried.

Chair Miyasato thanked everyone for their commitment and participation and appreciated everyone's input.

**5. Adjournment**

The meeting was adjourned at 3:55 p.m.

Respectfully submitted,

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

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Sheillane Reyes  
Recorder





**BRANDING STANDING COMMITTEE MEETING  
HAWAII TOURISM AUTHORITY  
Thursday, November 21, 2024, at 3:30 p.m.**

**Virtual Meeting**

**MINUTES OF THE BRANDING STANDING COMMITTEE MEETING**

<b>MEMBERS PRESENT:</b>	Blaine Miyasato (Chair), Mufi Hannemann, Roy Pfund
<b>MEMBERS NOT-PRESENT:</b>	Kimberly Agas, David Arakawa, Chris West
<b>HTA STAFF PRESENT:</b>	Daniel Nāho'opi'i, Iwalani Kūali'i Kaho'ohanohano, Jadie Goo, Jennifer Bastiaanse, Trishia Mendoza
<b>GUESTS:</b>	Eric Takahata, Jay Talwar, Lynn Whitehead
<b>LEGAL COUNSEL:</b>	John Cole

**1. Call to Order and Opening Protocol**

Ms. Kaho'ohanohano called the meeting to order at 3:35 p.m. Mr. Nāho'opi'i did the opening cultural protocol regarding Thanksgiving Day about Hawaiian culture.

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

Ms. Kaho'ohanohano did the roll call, and members were confirmed in attendance by themselves.

**3. Approval of Minutes of the July 23, August 19, and September 9, 2024 Branding Standing Committee Meetings**

Ms. Kaho'ohanohano suggested Chair Miyasato skip Agenda 3, which the Chair followed.

**4. Presentation and/or Discussion on the LA Saturation Activation and Other Updates from HTUSA (Hawaii'i Tourism USA)**

Mr. Talwar spoke about the L.A. market activation, a private market activation. The HTA was able to provide \$1.5M. Industry partners contributed as well. They are still doing the math on the totals. There is a lot of work being done. The majority of the budget went against the paid media. KTLA allowed them to do a lot of work through the editorial presentation and some significant tent pole events. The Aloha Market was very big, and they partnered up with Mana Up. They could also do a lot of work with private industry partners and the offers they provide. The PR team had some good interviews.

Paid Digital Media impressions included:

YouTube TV - 18.6M impressions

LG - 14.5M impressions

Trip Advisor - 5.5M impressions

Paid social media included:

The People. The Place. The Hawaiian Islands. content series promoted in Los Angeles and San Diego on Facebook and Instagram

Promoted Maui on TikTok in Los Angeles

Results:

Facebook: 5.8M impressions

Instagram: 4.9M impressions

TikTok: 4.6M impressions

Consumer Activation - Aloha Market Pop-up

Mana Up Hawai'i partnership

Heart of Abbot Kinney Boulevard, a neighborhood with excellent foot traffic

57 Hawai'i brands, 11 from Maui

9,328 attendees over three days

31 activations included workshops, demos, and panels

VIP Receptions excited media, influencers, travel advisors, MCI clients

Local coverage on KTLA, ABC, FOX

Generated 36,513,073 impressions across 28 media placements.

The participants were listed on a spreadsheet. Small businesses and well-known businesses took part. Better known included King's Hawaiian. Many start-up businesses were getting coverage due to the Aloha marketplace.

Mr. Talwar spoke about high-impact messaging platforms. He said they took advantage of a program on KTLA and, through connections, were able to get to the regular news. He showed a

few clips of Mayor Bissen. Gov. Green also showed up, thanked the people of L.A. for all the support shown to Maui, and invited them to return.

He said they were also involved in a lifestyle show called L.A. Unscripted, which focused on Maui. The half-hour show ran on Prime Time and repeated on the weekend and during the weekdays. There were three airings, and there is potentially another one coming up the following week. The focus was on the invitation to visit Maui and the State.

They also worked with Nexstar to have social media work with them. This was in partnership with Marriott. 50% was paid for from the HTA budget and 50% was paid for by Marriott. Social media did an amazing job with a quarter of a million impressions, a 4.2% engagement rate, and a lot of coverage beyond the show and different interviews and sessions with KPLA.

The PR team met with the New York Times, Los Angeles Times, Smithsonian, etc. They had in-person meetings with seven editors and freelance writers representing the publications. While they were there, each private industry partner said if there were a media inquiry, they would host them on the property to extend the budget and get more coverage for Maui. The PR team was able to work with Taste, and their highest-rated show, From Scratch, will be filmed on Maui in a week. It will air in the first quarter of 2025.

Mr. Talwar said public/private partnership is critical. Partners did extraordinary things. One partner redirected paid media investments to the Los Angeles market for September. Many hosted and educated travel agents and group clients. They conducted media blitzes. They support HTUSA-sponsored media visits with accommodations, meals, resort experiences, and activities. They offered attractive value propositions to stimulate visitor interest, such as complimentary night stays at hotels (3rd, 4th, 5th night free) and 20-25% off tours and transportation.

He mentioned the qualitative measures and the great results and success that resulted from activating their business moving forward.

For the public/private partnership programs, they also hosted close to 100 offers from all the properties, activities, attractions, airlines, lodging partners, etc. All provided a minimum of 20% off.

They had the travel trade team ensure all travel sellers were educated. They had 20 industry partners working with them and going with them to the trade show for education and training, and keeping all the travel sellers updated on the fact that Maui is open for business and the

fantastic things that can be done across the island and the State. They hosted those offers on-site, with up to a 30% discount. There were great offers from the private industry side. He thanked the HTA for funding this, allowing them to get into L.A. in September.

Chair Miyasato opened the floor for discussion. Nobody was online. Chair Miyasato observed that since he has been a part of the Board, all of this has been done transparently and is in public view, which is good. He said Mr. Talwar's presentation showed good ROI and tangible results from the exercise. Chair Miyasato asked if they could do a more formal presentation at the full Board meeting.

Mr. Talwar said that based on the results they have seen and looking at the advanced bookings for the following year, he underlined the need for more of these in the calendar year 2025.

Mr. Nāho'opi'i echoed the idea that it had been successful. He was there and saw many of the results in the industry partners who are glad that they have joined forces and recognized the need for these initiatives to boost demand from the U.S. to strengthen their deficit. Although it has been successful, there is still softening in the market, and additional initiatives will need to happen in 2025. They can present the following steps to the Board at the next meeting. Chair Miyasato said they must have forward-looking conversations around the results of the last installation. They can discuss forming a strategy and plan the budget request going into 2025.

##### **5. Presentation and/or Discussion on the JATA Expo and Japan Mission and Other updates from HTJ (Hawai'i Tourism Japan)**

Mr. Takahata gave the Japanese market update. Japan's GDP is positive, and the Bank of Japan plans to increase interest rates. They hope the U.S. continues to consider decreasing the interest rate so that the two currencies can get closer to each other. He pointed out that politically, they had just installed a brand-new prime minister in Japan. Unlike the U.S., he was installed in a shaky election. He hopes they stay on as Japan needs political stability, which will help with economic stability. He hoped that Prime Minister Ishiba could maintain his position. It is a shaky environment. The yen is weak against the U.S. Dollar. He is unsure what will happen with the economy and if they will address the yen issue against the dollar. He pointed out confusing data from banks and credit card companies. Japanese people save well, so there is a lot of money in Japan, and they invest in Hawai'i timeshares and luxury condos. They must expand on the high-value traveler who has the resources to travel.

He spoke about travel and the booking pace. All Japanese citizens going to other destinations is at 69% compared to 2019. A lot of those are traveling to closer destinations, e.g., Korea, South

Korea, Asia, etc., than Hawai'i. Most of the 69% is due to the closer destination travel because it is cheaper to get to, and the Yen goes further in those destinations.

The Honolulu Marathon is outpacing 2023 at about 108%. There are over 10,000 runners for 2024 from Japan. They are getting the runners-up for the Japan World Series. They are also getting the Pacific League champions. This is good for Hawai'i because there is a lot of media and sports media following the teams and the players, so it is a good promotion of the destination. Fuel surcharges continue to drop. It costs 16,000 yen one way to travel between Japan and Hawai'i, so a round trip is about 32,000 yen, which equates to less than \$300.

Airline booking rates are 100-105% ahead of 2023. Travel agencies report that it will be between 120 and 130 over 2023. Q1 is outpacing 2024, so these are all positive signs. Year-over-year for Japan, visitor arrival is increasing. They are looking to end 2024 at about 720,000, 22% higher than 2023. The trend for Q1 is looking suitable for the Japanese market. The visitors that can come are the high-end visitors. 2024 versus 2019 for visitor arrivals is about half for spending. Arrivals are about 45%, and visitor days are down, but visitors stay longer, which is a good KPI. The impact of the Japanese market on Hawai'i, looking at the tax revenue and total spending, pointed out the annual forecast for the per-person-per-day spending. 2019 was \$241.60. They are forecasting \$241.90 for 2024. He pointed out that the two factors influencing Japanese recovery are the U.S. inflation that has not cooled down to where they want it. The exchange rate is the second factor.

Mr. Takahata spoke about package pricing. He mentioned that a four-night package costs 320,000 yen, but looking at Guam, it is 265,600 yen. They are concerned with Australia and Singapore for the package price and the macroeconomics, as they are long-haul destinations for the Japanese, the same as Hawai'i. The yen to the AUD is almost even and hasn't fluctuated much since 2019. Japanese spending value to Australia is stable. The Australian inflation in 2019 compared to 2024 did not change much. Australia is gaining ground, and travel agencies are reporting that Australia is back to 2019 levels as far as the Japanese market goes. Similar to Singapore. The Singapore currency against the Japanese yen is almost even, and inflation has been kept in check.

Mr. Takahata spoke about the initiatives they continue to do in the market, such as Yappari Hawai'i campaign. They continue with this, getting into the consumer space. Their missions in Japan involve media events and VIP receptions, which was an excellent opportunity for the legislators to speak face-to-face. He said Chair Hannemann could vouch for that. The Tourism EXPO was great, and Chair Hannemann was there as well. He talked about the Made in Hawai'i

promotion, said they are doing many things to promote Hawai'i Made products, and mentioned a few events they are doing.

He spoke about strategies for 2025. In the short term, they must maintain their position in the market as the most desirable destination for Japan. During the short-term strategy, they must continue to attract high-value travelers who can visit and position themselves for when the macroeconomic situation changes. They must also increase the booking pace, which they always focus on.

He spoke about promoting group businesses.

He mentioned destination education and product development support within the travel industry.

He spoke about the mid-long-term strategy:

Attract first-time visitors and work with airlines and suppliers on this

Continuing initiatives targeting the youth market

Strengthening the branding of each island

Strengthening digital content marketing

Increase high-value traveler initiatives - increase business class seats

Further initiatives to attract the hula market

Keep marketing Hawai'i as a hub of education, expanding educational tourism.

Chair Miyasato opened the floor for comments. He added that Sen. DeCoite and the newest Board member, Todd Apo had joined them. Chair Miyasato said Japan is a relationship that they must not give up on. He is pleased that the results are starting to demonstrate Mr. Takahata's hard work. Hawai'i is looking to the HTA as the institution that leverages all resources, managing the complex markets and doing it in a way that has a good ROI but also acknowledges the unique nuances of the market. He always believed that what will make the market work is relationships, culture, quality, etc. He thanked Mr. Takahata for all the information. Mr. Pfund said he had to leave and thanked Mr. Takahata for all the work they have been doing for the Japanese market.

## **6. Update on the Partnership with Brand USA and other International Marketing Activities**

Mr. Nāho'opi'i said many were very excited by the presentation from the new CEO, Fred Nixon of Brand USA. He gave a recap. Brand USA is the marketing arm of the federal government. The money goes to ESTA, visa waiver registration program, and part of that fee goes to the

marketing. Hawai'i is also known as part of the United States. It is important that they align themselves with the efforts that the U.S. government is making to promote the U.S. and various destinations of which Hawai'i plays a strong role in Asia, Oceania, and the Pacific. They have been spending time with Brand USA to see how they can partner and align with Brand USA. One of the things that comes with partnering is money.

The first project with Brand USA and Expedia involves the following: for every dollar they put in, Brand USA contributes 20%. Because they have a contract with Expedia, they match it with another 40% of value in terms of the campaign. He showed the slide with the Expedia promotion. It was very important for Japan, Oceania, and Canada to see that they are still not at pre-pandemic levels and must recover the markets. They must have short-term bookings with the campaign from November 2024 to March 2025 to take advantage of the festive season when people are looking at bookings online. They decided on a 20% campaign with a 20% discount on attractions, activities, rental cars, and hotels. This is so that travelers can see all those assets that are unique to Hawai'i. Regarding money to fund the promotion, HTJ, Oceania, and Canada will contribute from their allocated BMP or campaign budget. They also advertise in the French market to capture all facets of the Canadian market.

He spoke about the overall long-term branding of the destination, which is critical. Brand USA has its own website and market representatives, etc., all driven to the Brand USA website. For the Brand USA website, they drive it to the Hawai'i website. However, they have not updated the Brand USA website in a while. They will be working to refresh the Brand USA content with the current GoHawaii site. They are both driven by Miles Media. They have negotiated a 25% discount in terms of the cost. They will throw in additional pages and update, so it is a great deal. They do paid media campaigns as well. They will also invest in SEO optimization, leading back to the Hawai'i website. VisitTheUSA.com is the website. The site will be available in 16 international languages.

He spoke about the IPW 2025 to promote the Hawaiian Islands. It will be in Chicago in June 2025. It is the most significant international tradeshow they participate in. Along with the HTA, they also bring the GMTs, Oceania, China, Canada, and Europe. Typically, the Japanese market has its tradeshows. In 2024, they had 214 trade appointments and 75 media appointments, and the PR had 120 media connections and meetings. Some results include networking with 14 clients in Oceania and Canada, while Europe had 32. Out of that, they had good follow-ups at their stakeholder meetings in Europe. Korea and China also had their client meetings. He showed some of the statistics. For IPW 2025, they made a few internal changes. It will be a

managed partnership with BIVBs, and the visitor bureaus will all attend. The payments will be structured directly from the HTA due to the relationship and memberships with U.S. travel.

He updated us on the spending. The HTA is also doing brand management and marketing internally. Their brand team is innovative in looking at opportunities to drive additional marketing directly from the HTA office.

#### **7. Presentation and/or Discussion Regarding an Update on the Meetings, Conventions and Incentives Market Activity and Pace Report**

Ms. Whitehead spoke about Meet Hawai'i. She said Meet Hawai'i is a collaboration between the HVCB and the HCC to attract and contract meetings, conventions, and MCI business to the State of Hawai'i.

The HVCB manages the business at the HCC from the HCC's perspective outside 13 months of arrival. They book businesses at the HCC but also use two or more hotels in the destination. The room nights help drive the economic impact for the State. From a single property perspective, a team is deployed to book all meetings on all islands with ten rooms or more at the peak, and they have a client services team. Once those groups book, they are deployed to connect all the meetings and meeting planners to the destination to give back programs to restaurants and offsite events to maximize the destination. The HCC books everything in the building within 13 months. Their focus is on local businesses, festivals, marathons, and sports groups. Their events team services the group with anything inside the building, and Ms. Whitehead's team services it with anything outside the building.

She spoke about MCI - economic impact on Hawai'i. DBEDT comes out with this report every August to measure the economic impact that meeting conventions and incentive business has brought to Hawai'i. These statistics show a little over \$1B in spending to the State. There is slightly higher spending in the meetings and incentives section, so they always look at the financial, insurance corporate, and incentive groups. The conventions also have a significant impact in that they bring a lot of attendees. The length of stay for the MCI is usually around 7.6 days. They stay for 3-4 nights and an additional 4 nights on another island. The average PPPD spending is around \$305. Meet Hawai'i is responsible for half a million in the economic impact, so the team is helping drive the numbers to the State.

She spoke about some of the major programs in the market segment.

Significant Programs for Asia/Oceania:



JTB and the signing at the JATA expo. They are working to resign HIS. Their newest promotion is a JATA collaboration focusing on the single property market to drive more business to all islands. It will be a competition, and they will take the top 30 salespeople and bring them to Hawai'i. A press conference will launch on November 21.

She spoke about the Citywide sales Fam. It was a great experience. They had 14 key clients that were in the destination. The HCC did a great job in welcoming them. All the partners went above and beyond. Their customers represent a significant amount of business and tentative business for O'ahu and the HCC. Seven groups are looking at booking the HCC for 2025 - 2028. They have about four groups they are looking to close in 2025, which represents about 25,000 total in-room nights. From 2029 - 2031, they have four groups. In the last two months, they have had a significant presence in the incentive financial and insurance markets.

Destination Hawai'i took place at Aulani Resort the previous month with 35 incentive clients. They also came to Waikiki and saw some of the hotel products.

Kathy Dever attended IRF, the leadership conference which they partner with. They had great focus groups in front of 95 key buyers.

The FICP had about 12 hotel partners who attended, with 200 plus insurance and corporate groups participating in the event.

They also attended IMEX America. There were about 5,750 total buyers, 3,500 exhibiting companies, 4,350 hosted buyers from 75 countries (Paid to come in), 1,400 buyer attendees representing 46 countries, and 82 press attendees. 27% of hosted buyers control budgets of over \$10M. 43% of hosted buyers are at director-level and above. The Meet Hawai'i team had about 157 appointments, 115 active leads, 70 in-person meetings, and 12 media appointments. The entire booth generated 803 appointments.

She spoke about production highlights.

Six verbal definites, representing about 31,000 TRNs, are looking to close citywide. They also have an additional 30,000 tentatives they are trying to close.

For single property in 2025, the pace will increase from 87% to 94%.

October 2024 offered the highest tentative production since 2018, with 83,921 TRNs.

Top of mind:

The strike has ended - catching up  
MFF - Marketing Flexibility Fund  
Citywide strategy session - HCC & HVCB - aligning their ten-year plan

She spoke about the 8-year future pace for Citywide. The building is closing in 2026, so they will lose those groups to different locations. In 2027 and 2030, they are on pace. If everything goes well, they will also be on pace for 2028. She spoke about the single property. They are at 94%, which increased 7% from the previous month, mainly due to IMEX. The following year, they are looking at launching a program for 2026 to help offset the loss from the closing of the HCC. It is all about diversification.

She showed a snapshot of single-property production by island. They are around \$264M in economic impact for the State. They are still lower in Maui and are doing what they can to provide extra incentives. Citywide's economic impact is \$303M, and single-property is at \$264M, for a total of \$568M.

She thanked Ms. Agas, who she was connecting with the following week.

## **8. Adjournment**

The meeting was adjourned at 5:04 p.m.

Respectfully submitted,



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Sheillane Reyes  
Recorder

6

**Presentation, Discussion, and Action on the  
LA Rams 2025 Program**



## **STAFF REPORT TO THE BOARD**

December 9, 2024

### **REQUEST:**

HTA staff seeks approval for a two-year, \$1.5 million annual base partnership with the LA Rams, commencing in the 2025-26 season. This partnership provides extensive brand exposure, community engagement, and economic benefits aligned with HTA's strategic priorities. The total request over both years is **\$3,765,000**.

Note that for each year of the agreement, HTA staff shall seek SPO approval for a sole source exemption and subject to the availability of funds.

### **FACTS:**

These highlights represent a summary of the proposed partnership, with additional details to be provided upon the conclusion of final negotiations. For the OTAs and Community Engagement initiatives, HTA will maintain oversight and collaborate with the Rams to ensure activities are culturally appropriate, empower local communities, and align with Hawai'i's values. Activities will also include elements accessible to visitors, promoting regenerative tourism and fostering meaningful connections with Hawai'i's unique culture and environment.

- **Premium Association:**
  - Official designations: "LA Rams at Home in the Hawaiian Islands" and "Official Island Getaway of the LA Rams."
  - Use of Rams branding and marks for marketing campaigns across key platforms.
- **Organized Team Activities (OTAs):**
  - Rams team to host OTAs on Maui, including two public practices and a community day.
  - Content creation featuring Maui as the backdrop, distributed across Rams' digital and social platforms.
- **Community Engagement:**
  - Youth-focused activities: a football camp, girls' flag football clinic, and locker room refurbishment for a Maui high school.
  - Authentic brand integration in community events and digital promotion.
  - The Rams would also host an athletic trainers session focused on health and player safety

December 9, 2024

- **Gameday Entitlement:**
  - High-visibility branding during one home game annually, including LED displays, social media, and stadium activations.
  - Hawaiian-themed gameday elements such as lei and music, plus pre-game and in-game media inclusion.
- **Year-Round Digital Amplification:**
  - Sweepstakes and targeted digital campaigns to promote Hawai‘i as a premier travel destination.
  - Logo inclusion in Rams’ mobile app, website, and other digital content.
- **International Expansion:**
  - Leveraging the Rams’ global presence in Japan to enhance Hawai‘i’s brand recognition through sweepstakes, digital campaigns, and co-branded marketing materials.

## **DISCUSSION:**

### **Value to Hawai‘i**

- **Brand Extension & Awareness:**
  - Strategic alignment with a major NFL team ensures ongoing exposure in domestic and international markets.
  - Amplifies Hawai‘i’s image as a premier travel destination, leveraging the Rams’ global fan base.
- **Community Benefits:**
  - Direct impact through youth sports programs, community day initiatives, and facility improvements in Maui.
  - Promotes regenerative tourism principles through culturally authentic activities and messaging.
- **Economic Impact:**
  - Drives tourism through enhanced destination marketing, which is expected to increase visitor arrivals and spending.
  - Aligns with HTA’s focus on diversifying the tourism market with a sports tourism strategy.

## **BUDGET IMPLICATIONS:**

- **Annual Investment:** \$1.5 million, with a 3% annual escalator.
- **Playoff Costs:** Incremental billing for playoff games, capped at \$360,000 annually, based on participation.
- **Funding:** Payments are to be made in two equal installments on April 30<sup>th</sup> and September 30<sup>th</sup> each year.
  - For 2025-2026 Season:
    - April 30, 2025, Payment 1
      - FY25, Program ID 115, BLI 346: \$955,000
    - September 30, 2025, Payment 2
      - FY26, Program ID 116, BLI 346: \$955,000

- For 2026-2027 Season:
  - April 30, 2026, Payment 1
    - FY26, Program ID 116, BLI TBD: \$977,500
  - September 30, 2026, Payment 2
    - FY27, Program ID 116, BLI TBD: \$977,500

• **Summary Table:**

	<b>2025-2026 Season</b>	<b>2026-2027 Season</b>	<b>Total</b>
<b>Base</b>	\$1,500,000	\$1,545,000	\$3,045,000
<b>Playoff Contingency</b>	\$360,000	\$360,000	\$720,000
<b>Misc Costs</b>	\$50,000	\$50,000	\$100,000
<b>Total</b>	<b>\$1,910,000</b>	<b>\$1,955,000</b>	<b>\$3,865,000</b>

Base: Covers all elements of the attached proposal, excluding the playoff contingency.

Playoff Contingency: Marketing-related expenses if the LA Rams reach the playoffs.

Misc Costs: Expenses incurred by HTA for the oversight and implementation of the program. These may include costs associated with program evaluation, travel, and activations such as photography, leis, musicians, and travel for HTA representatives.

**RECOMMENDATION:**

This partnership represents a strategic investment in sports tourism, delivering significant value to Hawai‘i while aligning with HTA’s mission to promote sustainable and culturally authentic travel experiences. Approval of this proposal is recommended.

8

**Presentation and Discussion on the Progress of  
EDA's Non-Competitive State Tourism Grant  
under the American Rescue Plan Act**

# UPDATE ON THE EDA'S TRAVEL, TOURISM, AND OUTDOOR RECREATION NON- COMPETITIVE STATE TOURISM GRANT

Presented by  
Caroline Anderson  
Director of Planning  
December 11, 2024





# TRAVEL AND TOURISM PROJECTS

# Tourism Recovery – Branding Campaign

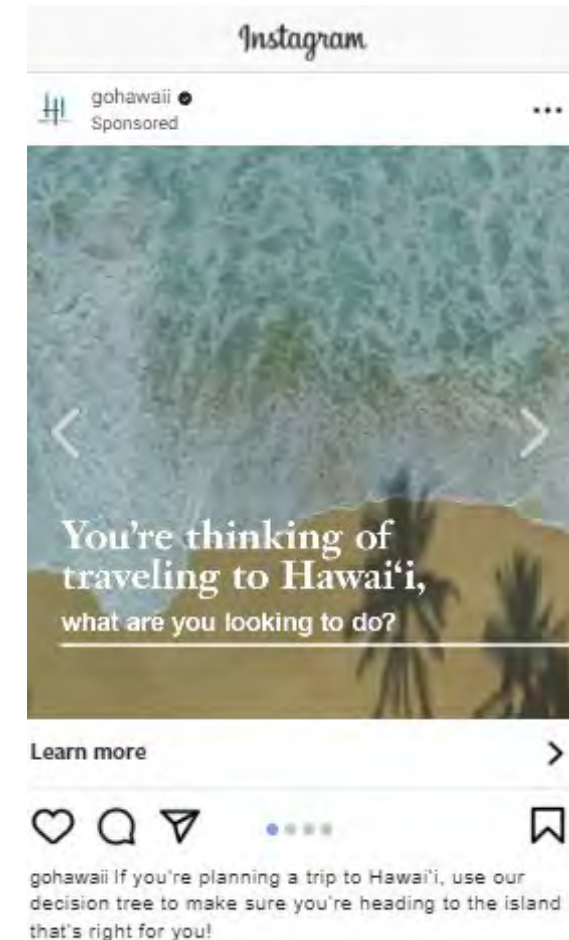
- **Paid Digital Media Results**

- Amazon – 14.8 million impressions
- LG – 9.8 million impressions
- Roku – 9.3 million impressions
- Samsung – 8.6 million impressions

- **Paid Social Media Results**

- Facebook – 122 million impressions
- YouTube – 70 million impressions
- Instagram – 36 million impressions
- TikTok – 30 million impressions
- Pinterest – 21 million impressions

- **Budget: \$3.2 million**



# Tourism Recovery – Travel Trade Education Initiatives

- **In-market Travel Advisor Training**
  - 1,500 advisors via educational events
  - 200+ advisors through in-person appointments
  - 3,000+ advisors through Trade Shows
- **Additional Education Events**
  - June educational blitz (Denver and Salt Lake City)
  - Avoya Hawai'i/South Pacific training event
  - Global Travel Marketplace (GTM)
  - Midwest Agents Selling Travel Conference (MAST)
  - ASTA Global Convention
  - Travel Leaders EDGE Conference
  - Signature Travel
  - Northern California and Pacific Northwest Ohana Events
- **Trade Collateral**





# Tourism Recovery Tactical Wholesaler Co-op Marketing

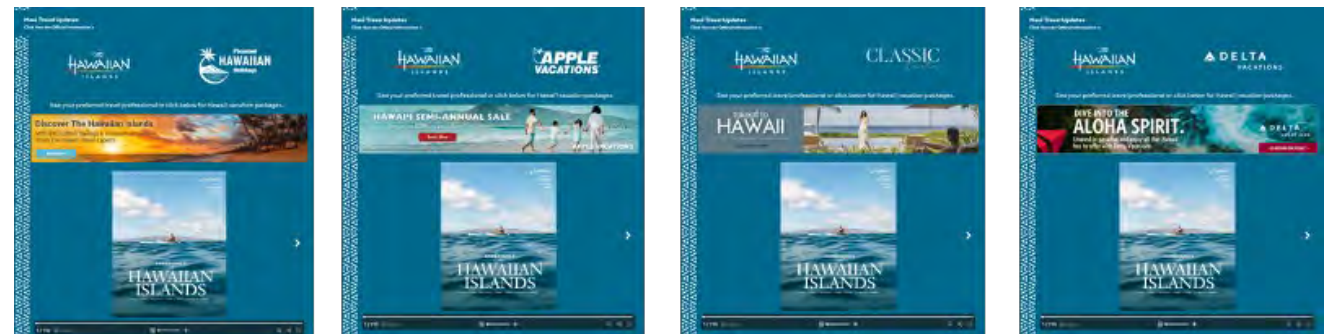
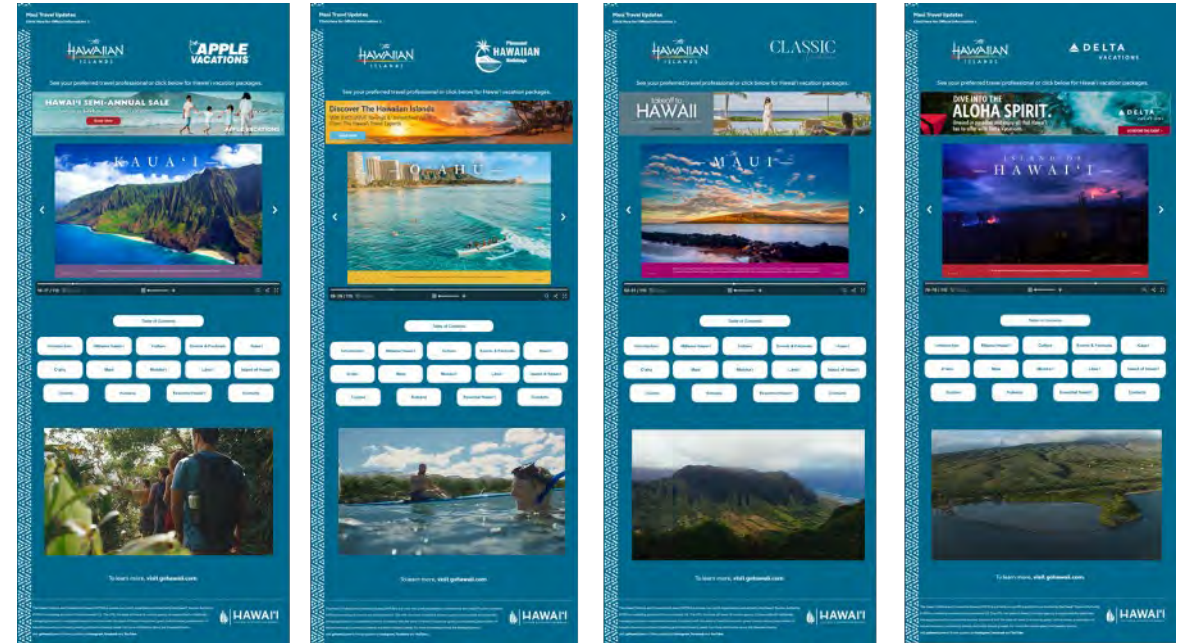
- **Co-Op Partners**

- Pleasant Holidays
- ALG/Apple Vacations
- Delta Vacations
- Classic Vacations
- Hawai'i Destinations

- **Results**

- Visitor Arrivals – 169,400
- Room Nights Booked – 77,010
- Visitor Expenditures -- \$45.5 M

- **Budget: \$750,000**



# Urban Trails

- Create unique and engaging experiences to connect residents and visitors to vibrant towns rich in culture and history.
- **Status:**
  - Waiting for approved content and updated route. Will be refurbishing markers along the Waikiki Historic Trail. Partnership with County, OVB and NaHHA. To be completed by end of 2025.
  - Will seek proposals for other areas in Q1 2025 for completion in 2026.
- **Budget:** \$750,000



# Expanding Agritourism Opportunities in Hawai'i

Hawai'i  
Agritourism  
Study

Agritourism  
Conference

Hawai'i  
Agritourism  
Plan

Agritourism  
Community  
Tourism  
Collaborative

- **Status:** Waiting for EDA approval
- **Proposed Timeline:**
  - Agritourism Study – completed in 3 months
  - Agritourism Conference – Held in April/May 2025
  - Hawaii Agritourism Plan – Completed by Q3 2025
  - Agritourism Community Tourism Collaborative – Q4 2026
- **Budget:** \$750,000





# OUTDOOR RECREATION PROJECTS



# Recreational Trails Research Project

## Research aims:

- (1) identify high risk trails based on human traffic, soil erosion, types of use (e.g., hiking, biking), and trail design
- (2) identify optimal actions to maintain trails for multiple uses, considering costs alongside social and environmental factors;
- (3) quantify willingness to pay for fee systems given user preferences

## Accomplishments in 2024:

- 5 in-person workshops to determine project scope, objectives, and trail management actions
- Statewide soil erosion modeling
- Collected data for trail vulnerability & economic assessments
- Weekly virtual planning meetings

Timeline: Project is set to be finished by December 31, 2026

Budget: \$1.1M





# NĀ MANU ‘ELELE STEWARD PROGRAM

## HAWAI‘I ISLAND

- Miloli‘i CBSFA
- Various NAH trails:
- Kaulana Manu Trail
- Kaumanā Trail
- Onomea & Donkey Trail
- Pololū Valley
- Puna Trail
- Pu‘u Huluhulu
- Pu‘u Ō‘ō

## MAUI

- Kīpahulu CBSFA
- Various NAH Trails:
- ‘Ohai Loop Trail
- Polipoli Trail
- Waihe‘e Rodge Trail
- Waihou Spring Trail
- Waikamoi Trail

## O‘AHU

- Kaneohe Bay CBSFA
- Various NAH trails:
- ‘Aihualama Trail
- Kalāwahine
- Ka‘iwa Ridge Trail
- Kanealole Trail
- Mānoa Falls Trail
- Makiki Arboretum Trail
- Makiki Valley Trail
- Maunalaha Trail
- Pauoa Flats Trails
- Pu‘u Pia Trail
- Tantalus Arboretum Trail
- ‘Ualaka‘a Trail
- Waimano Trail

The Nā Manu ‘Elele Steward program is a collaboration between DLNR and KUPU. This program was created in an effort to mitigate unwanted behaviors by trail users. Stewards engage with the public and share the history and hazards of their site.

The budget of **\$3.85 million** will last until the end of 2026. The hiring capacity of this program is for employment of 24 full-time stewards. **There are currently 25 stewards employed statewide.**

### Challenges :

- Response capacity of enforcement
- Hiring
  - Maui fire - limited job market
  - Kaua‘i wages – cost of living is high

### Outcomes:

A goal of this program is to provide community empowerment for those connected to the sites. Results would include the implementation of site-specific management practices.



## IMPACTS

- Since May 2024, stewards have collectively engaged with an approximate 160,000 users.
- Implementation of standardized data collection statewide.
- Data collection for statewide trail capacity project.
- Prevention of injuries = Less rescues.
- Prompt first aid response time.
- Assisting DOCARE and HPD by reporting infractions.
- Community engagement.
- Public education and outreach.
- Communication and collaboration between: Nā Ala Hele, KUPU, Division of Aquatic Resources, Makai Watch program, Community Based Subsistence Fishing Areas, DOCARE, Hawaii Fire Department and the Hawaii Police Department.





# Ala Kahakai National Historic Trail

## Interpretive Plan

### Research

- Extensive research on historical records and studies.
- Engagement with community members, partners, and lineal descendants.

### Planning

- Establishment of a detailed interpretive signage plan.
- Development of historic and culturally significant information that will be displayed.

### Feature Designing

- Implementation of interpretive signage, kiosks, and trail signs to highlight specific features.
- Utilizing tools to establish digital engagement.

Budget:

\$300,000

Completion:

End of 2025

Project area length

180 miles

Partners:

Ala Kahakai National Historic Trail  
HIDOT Highways,  
HI County Parks  
Local Communities



# NĀPU‘U RECREATION PLAN

## Background

The Nāpu‘u region is composed of the Pu‘uwa‘awa‘a Forest Reserve and Pu‘uanahulu Game Management Area of North Kona.

- Project area is approximately 108,000 acres.
- Project budget is \$400,000.

## Preliminary Research

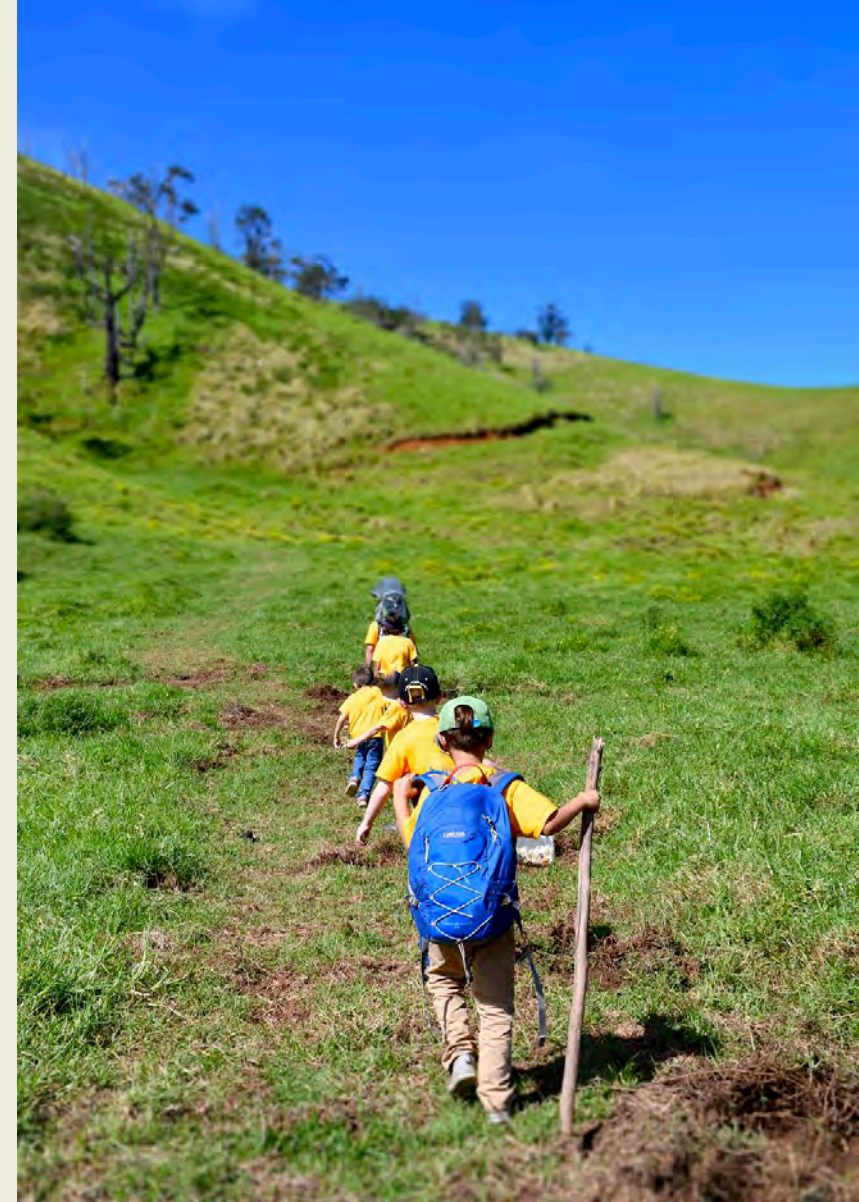
- Inventory of all existing resources that have the potential to be repurposed or reconstructed.
- Research of historic records.
- Analyzing components of potential recreational activities.

## Engagement

- Consultation with descendent families.
- Consultation with stakeholders.
- Public input sessions.
- Conduction of surveys.

## Output

- Recreation plan for the Nāpu‘u region.
- Findings of cultural and historic research.
- Recommendations from stakeholders/ all user groups.
- Compliance documents for implementation of recreational features.
- Interpretive and signage plan.
- Project must be completed in entirety by June 30, 2026.



# Equipment and Educational Materials

Division of Conservation and Resource Enforcement (DOCARE)

## Project Summary:

Purchase gear for equipping our Conservation Enforcement Officers and procuring educational and outreach materials for distribution to the public

## Accomplishments:

New badges and outreach materials have been purchased

## Challenges:

Procuring appropriate vendors for the types of equipment and materials needed

Completion:  
End of 2025

Budget:  
\$400,000



Department of Land and Natural Resources



# Day Use Mooring Buoy Program \$400,000

## TASKS

- 1: Update statewide inventory of day-use mooring buoys
2. Update and revise DLNR DMB Management Plan
3. Develop and maintain online database of moorings and maintenance status for South Maui and Molokini DMBs ("Maui Pilot")
4. Inspect Maui Pilot moorings twice annually.
5. Maintain Maui Pilot moorings (repair and replace)
6. Develop and implement a communication plan to engage DMB users
7. Develop capacity for maintenance and inspection statewide using BMPs developed under the Maui Pilot

## Accomplishments

*Tasks 1 – 7 were subawarded to the nonprofit Malama Kai Foundation, who have developed a public-facing website for beta testing, completed the first round of inspections and repairs for the Maui pilot, and are updating the DMB management plan. **Timeline: Completion June 2026***



# O'ahu Coral Restoration Enhancement

Division of Aquatic Resources (DAR) Hawai'i Coral Restoration Nursery (HCRN)

**Project Summary:** Plant 80 - 100 nursery-grown native Hawaiian corals at existing Kewalo and/or Maunalua Bay SCUBA dive sites as educational restoration for visitors and residents

- Obj 1: Integrate stakeholder input into coral restoration plan.
- Obj 2: Implement site-specific coral restoration plans within existing Kewalo and/or Maunalua Bay recreational SCUBA dive sites.
- Obj 3: Provide outreach and education engagements with Hawai'i's communities.

## Accomplishments

- **Obj 1.** Formed the engagement team, identified stakeholders, completed outplant site assessments at Kewalo dive sites, finalizing a stakeholder engagement contractor.
- **Obj 2.** Started growing 40 coral pyramid modules from coral that would appropriate to outplant at either proposed restoration site.
- **Obj 3.** Created and implemented a new Coral Nursery Internship program for students, worked with partners to create educational materials and reached over 1,000 individuals in outreach and community events, worked with local educators to develop student-led coral restoration projects in the classroom.

**Challenges:** Delays in securing a stakeholder engagement contractor pushed stakeholder meetings to early 2025.

**Timeline:** Completed by Dec 31, 2026

**Budget:** \$750,000



9

**Update on the Partnership with Brand USA  
and Expedia**



# **Brand Standing Committee Meeting**

**12/12/2024**

**Agenda #9 : Update on the Partnership with  
Brand USA and Expedia**



# Brand USA x Expedia Promotion

- **Purpose:** To boost short-term bookings to Hawai'i
- **Promotional Period:** 11/27/24 - 3/31/25
- **MMAs:** Canada / Oceania / Japan (scheduled 12/15/24 - 2/28/25)
- **Matching:** Brand USA 20% + Expedia 40%
- **Partner Offer:** Minimum 20% Off
- **Industry Support:** Special offers by hotels / activities / car rentals

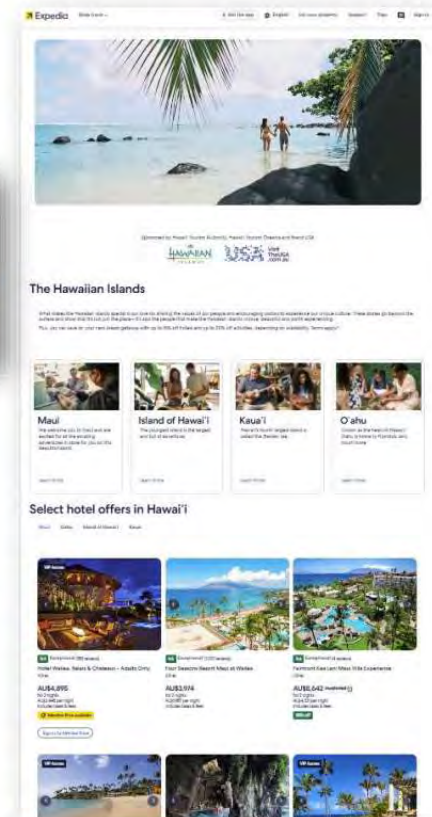
# Brand USA x Expedia Promotion

(11/27/24 - 3/31/25)

## ANZ POS

AU: <https://www.expedia.com.au/lp/b/ms-b-dmo-exp-au-hawaii-brandusa?siteid=25&langid=3081&cache=false>

NZ: <https://www.expedia.co.nz/lp/b/ms-b-dmo-exp-nz-hawaii-brandusa?siteid=29&langid=3081&cache=false>



# Brand USA x Expedia Promotion


(11/27/24 - 3/31/25)

## Canada POS

<https://www.expedia.ca/lp/b/ms-b-hotel-exp-ca-en-hawaii-brandusa>

Ad

**Family fun,  
Hawaiian style**  
Where paradise goes for inspiration.



**Discover Hawai'i for less**  
Experience Hawai'i for less with 20% off hotels and activities. Terms apply.

**HAWAIIAN ISLANDS** **USA** Visit TheUSA.GA

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Sponsored by Hawai'i Tourism Canada and Brand USA

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### Experience Hawai'i

Feel the aloha spirit.  
Experience all that Hawai'i has to offer. If you've been, you know. Stunningly beautiful, warm and welcoming with incredible and unique experiences to be cherished. You'll truly feel the Aloha spirit. Maui, O'ahu, Kauai or the island of Hawai'i. Why choose just one? Malama means caring for and protecting what is so special about Hawai'i. And we encourage it. Travel responsibly. Seek out the fascinating history. Sense the culture. Explore local. You can thank us later. Plus, you can save on your next dream getaway with up to 20% off hotels and up to 20% off activities, depending on availability. Terms apply.\*

**Sightseeing**  
Hawai'i is both stunningly beautiful and fascinating. More sites to see than can be imagined. Each unique island begs to be explored, and the navigation is easy. From historical sites to quaint towns and incredible state parks, there truly is something for everyone and every interest.

**Family fun**  
Be prepared for bare ankles. From kids to grandparents, every member of your family will find activities to love on the Hawaiian Islands. Action-packed days, relaxing on the beach or enjoying an incredible Luau, you'll create picture-worthy family memories that will last a lifetime.

**Culture**  
Hawai'i is a special place. The culture will captivate you. The spirit of aloha - being in the presence of and sharing the essence of life - requires lessons of peace, kindness, compassion and responsibility to future generations. Seek out the music, arts and cultural practices that will enrich your visit immeasurably.

### Select hotel offers in Hawai'i

Maui O'ahu Island of Hawai'i Kauai

10% Off Maui 10% Off Kauai

# Brand USA x Expedia Promotion

(12/15/24 - 2/28/25)

## Japan POS

<https://www.expedia.co.jp/lp/b/ms-b-dmo-exp-jp-hawaii-brandusa?siteid=28&langid=1041&cache=false>





# Brand USA x Expedia Promotion

Promotional Period: 11/27/24 - 3/31/25

Tracking Period: 11/27/24 - 12/9/24



Results in Under 2wks of Data =  
**172-to-1 Return on Ad Spend**

Display Ads	Ad Spend	Impressions	Clicks	CTR	Revenue	ROAS
	\$5,961	255,546	371	0.15%	\$1,030K	172.7

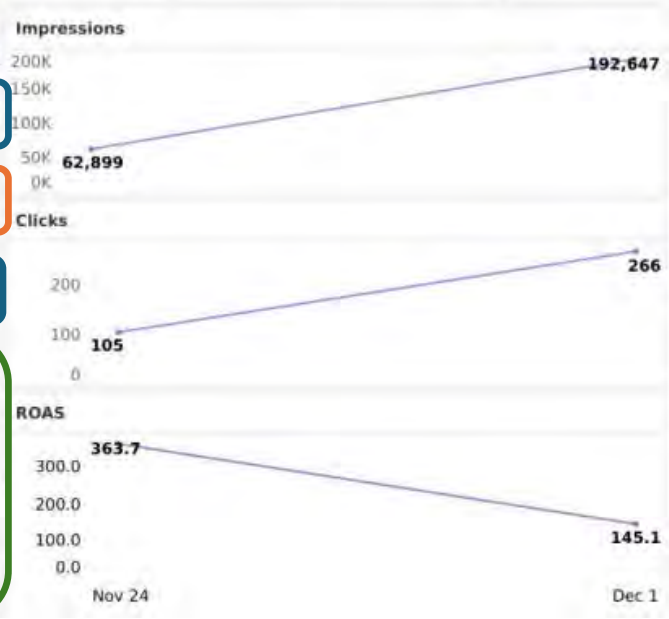
# Brand USA x Expedia Promotion



## Display Performance Summary - Hawaii Tourism Authority

Impressions	Clicks	CTR	Ad Spend	Room Nights	VR Nights	Air Tickets	Travelers	Car Rentals	Activity Tickets	Revenue	ROAS
256K	371	0.15%	\$6K	2,203	0	562	1,342	0	14	\$1,030K	172.7


POS Name	Impressions	Clicks	CTR	Ad Spend	Revenue	ROAS
Expedia Australia	46K	46	0.10%	\$961	\$141K	147.2
Expedia New Zealand	27K	38	0.14%	\$546	\$20K	36.6
Expedia TAAP Australia	34K	11	0.03%	\$827	\$40K	48.7
ExpediaPlus Canada	108K	176	0.16%	\$2,966	\$771K	259.8
ExpediaPlus Canada (French)	40K	92	0.23%	\$634	\$57K	90.5
Hotels.com Canada	1K	8	0.91%	\$26	\$0K	0.0



10

**Presentation and Discussion on the  
Progress of the Reservation System Report**

# Hawai'i Smart Tourism App

Prepared for the  HAWAII TOURISM  
AUTHORITY

Presenter: Dan Wacksman





# Scope of Work

The Hawai'i Tourism Authority seeks to enhance visitor and resident experiences through a destination app, leveraging digital services to improve engagement, streamline operations, drive economic benefits, and manage the destination more effectively. Sassato has been engaged to evaluate the app's feasibility and strategic approach, ensuring alignment with key goals and stakeholder interests. Deliverables include a comprehensive written report and presentation summarizing findings, analyses, and recommendations.

## Key Deliverables

### **Stakeholder Analysis**

- Interview up to 100 key stakeholders.
- Identify desired features, functionalities, and priorities.

### **Current Hawaii Systems and Integrations**

- Assess existing apps and systems for compatibility.
- Highlight integration opportunities and potential challenges.

### **Benchmarking and Best Practices**

- **Hawai'i:** Analyze similar state-level initiatives.
- **Global:** Research international best practices in destination apps.

### **Marketing and User Acquisition**

- Strategies for marketing and user acquisition in the space
- Recommendations on branding, user engagement, and retention strategies to ensure app adoption and sustained success.

### **High-Level Business Requirements**

- Prioritize app features and functionalities.
- Create a phased roadmap, starting with a Minimum Marketable Product (MMP).

### **Technical and Operational Considerations**

- Technical Considerations and Potential Vendors
- Assess ongoing operational needs and cost implications.

### **Recommendations and Next Steps**

- Provide strategic recommendations.
- Outline next steps for development.



## The Sassato team brings together experienced consultants with decades of experience in travel and tourism both in Hawai'i and beyond.



**Dan Wacksman**

*Project Lead*

With over 25 years of experience in travel and hospitality, Dan has expertise in technology, marketing, distribution, and business management. He is currently CEO of Sassato, Senior Advisor McKinsey & Co, and previously SVP at Outrigger Resorts & Hotels.



**Lisa Menor Miller**

*Stakeholder Analysis*

A CPA with over 30 years of experience, Lisa has expertise in strategy, finance, and project management. She has led operations as VP of Franchising at FCH Corporation and COO/Asset Manager for HTH, overseeing \$400 million in transactions and business development.



**Mari Kam**

*Research and Marketing*

A seasoned digital marketer with, Mari has led online marketing initiatives for Marriott properties in Hawai'i and managed marketing strategies for Halekūlani Corporation. She holds a Master of Management in Hospitality from Cornell and is skilled in providing insightful solutions for project execution.



**Tim Peter**

*Tech and Ops*

An award-winning digital marketing and technology leader, Tim has over 25 years of experience. He founded Tim Peter & Associates and previously led digital strategy for Wyndham Hotel Group and The Leading Hotels of the World. He also teaches digital marketing at Rutgers Business School.



**John Neeley**

*Business Requirements*

A senior IT executive with over 35 years of experience, John has led global technology and business development initiatives. His experience includes roles Outrigger Enterprises as VP of Technology and Lockheed Martin. John holds a Master of Science in Information Systems from Hawai'i Pacific University.



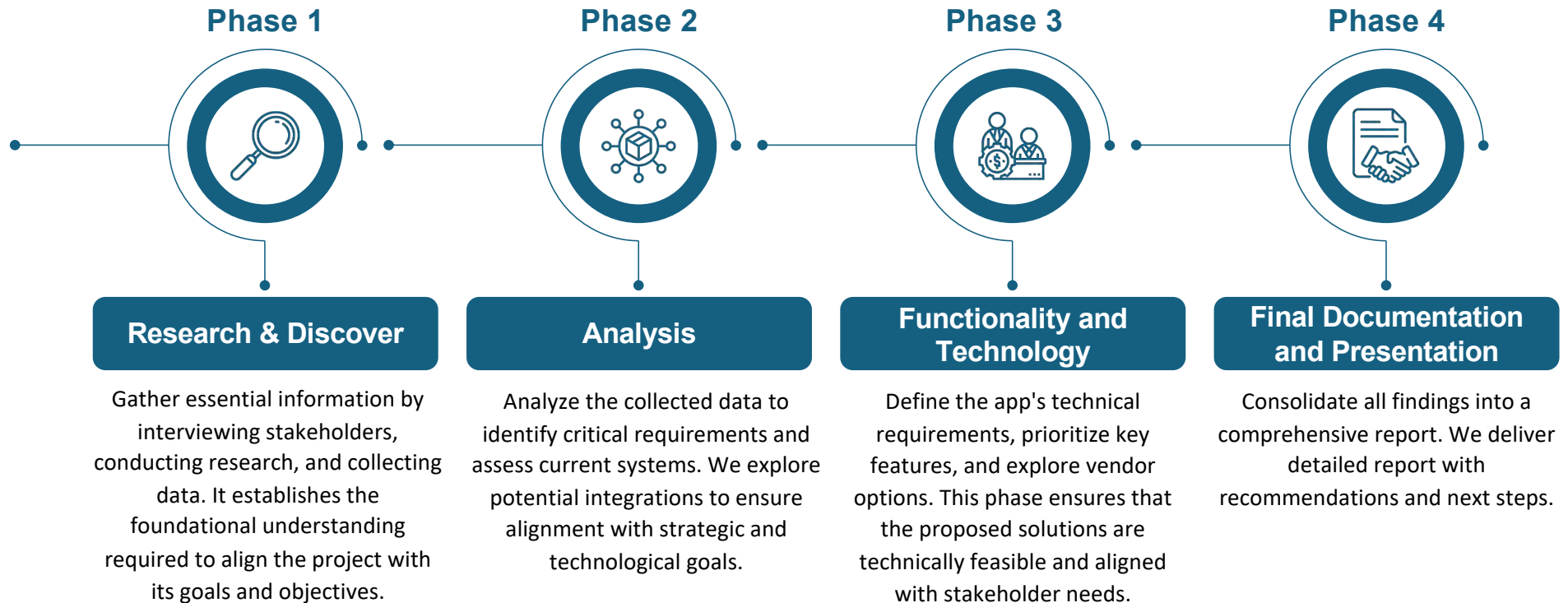
**Dylan Wacksman**

*Project Coordinator & Research*

A project manager at Sassato, Dylan brings experience in hospitality, with roles in social media, marketing, and front-of-house sales. He is a recent graduate of the University of Miami.



# Project Approach



# Interviews Process

## Arranging Interviews

### HTA Creates Interviewee List

- **Initial Outreach:**
  1. HTA creates list of stakeholders
  2. HTA sends an introductory letter to introduce the project and its purpose.
  3. Sassato follows up with an interview invitation, including calendar links for scheduling and pre-interview survey.
- **Follow-Up Process:**
  1. Send up to three follow-up emails if there is no response.
  2. If no response after the third attempt, HTA attempts to reach out again and/or provide a list of alternative interviewees for outreach.

### Interview Execution

1. Ensure all logistics (calendar invites, platform access, etc.) are confirmed ahead of time.
2. Conduct the interviews in a structured, professional, and utilizing the approved questions and expanding on them as needed
3. Take detailed notes or record interviews (with consent) to ensure data accuracy.

## Post-Interview

### Data Review and Analysis:

1. Synthesize individual interview findings to identify key themes and insights.
2. Analyze the data from all interviews **in aggregate** to uncover broader trends, patterns, and correlations.

### Key Findings:

1. Refine the results into actionable key findings aligned with the project's objectives.
2. Summarize insights in a concise, organized format for inclusion in project deliverables.

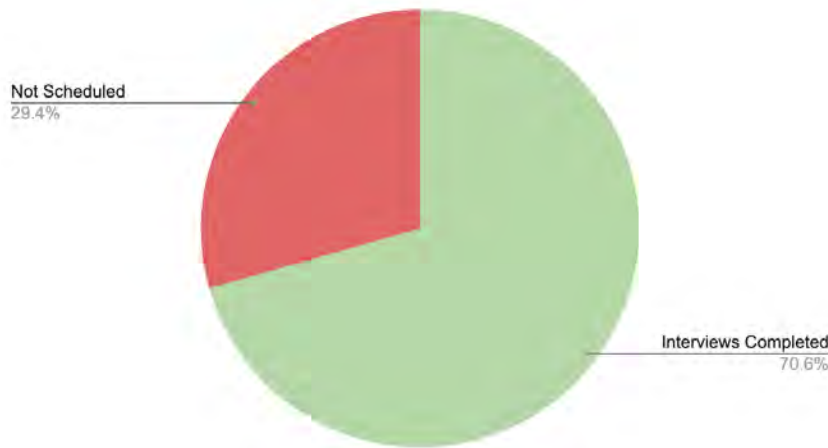
### Key Dates:

- Project Kick Off: Sep 9, 2024
- Interview Start: Target Oct 1<sup>st</sup>, Actual Oct 15
- Interview Completion: Target Nov 15, Actual Dec 3
- Final Presentation: Dec 19



# Interview Status

	Total	Percentage Completed
<b>Stakeholders</b>	<b>102</b>	
<b>Interviews Completed</b>	<b>72</b>	<b>71%</b>
<b>Not Scheduled</b>	<b>30</b>	<b>29%</b>
<b>Surveys Completed</b>	<b>61</b>	<b>85%*</b>



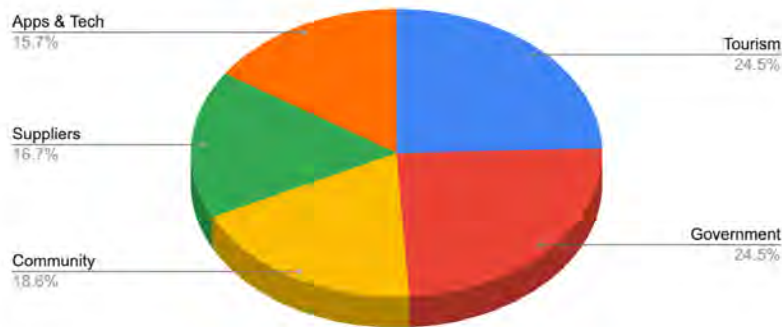
\* Note: % of those interviewed who completed the survey

- ❑ All of the **102** Stakeholders that were on the list were invited to interview.
- ❑ **72** interviews have been completed.
- ❑ Initial plan was to complete interviews by Nov 15, but was pushed to Dec 3 to accommodate more interviews.
- ❑ At least three follow-up attempts were made to contact those who did not schedule an interview.

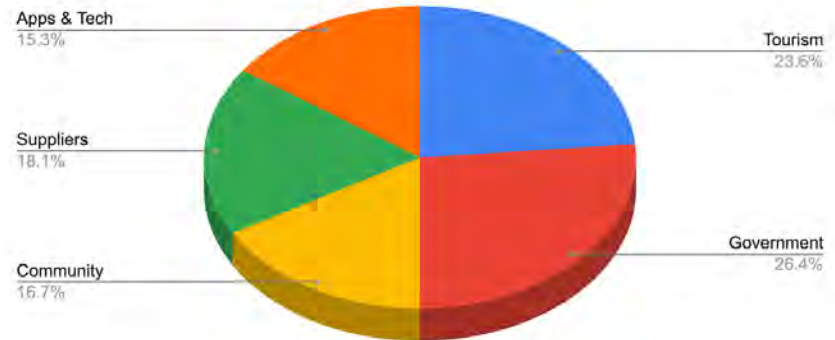
# Interview Breakdown by Category

	Total Stakeholders Per Category	Completed Interviews by Category	Completed Interview Percentage	Stakeholders that Completed the Survey	Percentage of Stakeholders Were interviewed who also Completed Survey
<b>Tourism</b>	<b>25</b>	<b>17</b>	<b>68.00%</b>	<b>12</b>	<b>70.59%</b>
<b>Government</b>	<b>25</b>	<b>19</b>	<b>76.00%</b>	<b>17</b>	<b>89.47%</b>
<b>Community</b>	<b>19</b>	<b>12</b>	<b>63.16%</b>	<b>11</b>	<b>91.67%</b>
<b>Suppliers</b>	<b>17</b>	<b>13</b>	<b>76.47%</b>	<b>12</b>	<b>92.31%</b>
<b>Apps &amp; Tech</b>	<b>16</b>	<b>11</b>	<b>68.75%</b>	<b>9</b>	<b>81.82%</b>
<b>Total</b>	<b>102</b>	<b>72</b>	<b>70.59%</b>	<b>61</b>	<b>84.72%</b>

Total Stakeholders Per Category



Completed Interviews by Category



# Areas of Focus

<b>Benchmark and Best Practices</b>	Research and analyze Destination Marketing Organization (DMO) or related apps that have been developed, for both Hawai'i and Globally.
<b>Current Systems</b>	Develop a list known relevant Hawai'i apps and systems based on interviews and independent research, focusing on both governmental and non-governmental apps/services with similar functionality.
<b>Potential Partners</b>	Conduct initial discussion with potential vendors to gather insights and recommendations.
<b>Business Requirements</b>	Develop detailed list of potential features and functionalities for the app based on interviews and research.
<b>Technical and Operations</b>	Define the size and scope of the product, outlining key technical issues and ongoing support needs and related costs for maintaining the app.
<b>Recommendations &amp; Next Steps</b>	Develop overall options and recommendations based on the analysis conducted throughout the project.





# Managing tourism and enhancing the visitor experience

Research and Feasibility Report on the Creation of a Hawaii Smart Tourism App

Presenter: Dan Wacksman | Date: December 19, 2024

**SASSATO** CONFIDENTIAL

## Agenda

- 1 Project Background
- 2 Executive Summary
- 3 Stakeholder Analysis
- 4 Current Systems and Integrations
- 5 High Level Business Requirements
- 6 Marketing and User Acquisition
- 7 Technical and Operational Considerations
- 8 Recommendations and Next Steps
- 9 Supporting Materials

**SASSATO** CONFIDENTIAL 2

### The concept of "Smart Tourism" emerged around 2010, evolving from "Smart Cities."

*It gained prominence as destinations sought technological solutions to address over tourism and enhance visitor experiences.*

**While there is no single agreed upon definition of Smart Tourism it can be summarized as:**  
The use of information and communication technologies to enhance the tourist experience and improve the efficiency of resource management to maximize both destination competitiveness and consumer satisfaction while also demonstrating sustainability.

**Most definitions emphasize:**

- The use of advanced technologies (ICT, IoT, AI, etc.)
- Data collection and utilization
- Enhanced tourist experiences
- Improved efficiency and sustainability
- Integration of various stakeholders and resources

**Smart Tourism in Hawaii**

- As one of the leading destinations in the world Hawaii has also been aware of and involved in Smart Tourism since its inception
- In 2020, when looking at post-covid tourism UHERO (University of Hawaii Economic Research Organization, issued a report titled "[Can Hawaii Rise from the Ashes of COVID-19 as a Smart Destination?](#)"
- The Hawaii Tourism Authority's [2020-2022 Strategic Plan](#), while not directly addressing Smart Tourism, called for evaluating and utilizing technology to better manage tourism
- The Island Destination Management Plans also mention the use of technology in improving destination management.

The Smart Tourism app actively became a discussion in the legislature in 2023 and 2024 led by Tourism Chair Representative Quinlan, and included discussion of

- A facility reservation system on a statewide basis
- Pre-paid time slots for parking at popular destinations
- Providing alternative destinations during peak times
- Safety and cultural guidelines

**SASSATO** CONFIDENTIAL 4

### Centralizing Hawaii's tourism information into an app is complicated by a variety of factors including disparate sources, lack of current collaboration among partners, and the overwhelming volume of content needed to upkeep a reliable and up-to-date resource.

**Key Challenges**

- Disparate Information Sources:** No central "source of truth" currently exists, with information scattered across various platforms, making it challenging for visitors to find the most accurate and up-to-date resources.
- Lack of Coordination Among Organizations:** Many organizations are working towards similar smart tourism goals independently, at different development stages, leading to potential duplication and inefficiencies.
- High Maintenance Needs:** With so much information to manage, each organization will need to take responsibility for keeping their content updated, ensuring that a centralized platform remains a trustworthy, go-to resource.
- Reliance on Social Media:** Currently visitors often rely on social media due to the abundance of resources for information, creating an additional risk that they are exposed to outdated, inaccurate, or even unsafe visitor information.

**SASSATO** CONFIDENTIAL 11





# Weekly Project Updates

## Nov 11-Nov 19

- ✓ Interview Update
  - ✓ Sent out 99 Invites
  - ✓ Scheduled 68% of interviews
  - ✓ Conducted 65% interviews
  - ✓ 4 More Interviews are scheduled this week (will bring to 69%)
  - ✓ Surveys completed by 88% of those scheduled
- ✓ Continue Interview Analysis and findings
- ✓ Continue working on analysis and building out slides for:
  - ✓ Stakeholder Analysis
  - ✓ Business Requirements
  - ✓ Marketing and User Acquisition
  - ✓ Tech and Ops Considerations

## Nov 19-Nov 26

- ✓ Interview Update
  - ✓ Sent out 101 Invites
  - ✓ Scheduled 69% of interviews
  - ✓ Conducted 68% interviews
  - ✓ 5 Interviews have been completed since the last update
  - ✓ 1 More Interview is scheduled this week (will bring to 69%)
  - ✓ Surveys completed by 87% of those scheduled (We added two stakeholders which lowered the percentage)
- ✓ Initial Analysis of Stakeholder Interviews has been completed
- ✓ Further progress on analysis and building out slides for:
  - ✓ Stakeholder Analysis
  - ✓ Business Requirements
  - ✓ Marketing and User Acquisition
  - ✓ Tech and Ops Considerations

## Nov 26-Dec 3

- ✓ Final research and follow-ups and interviews
- ✓ Continued working on analysis and building out slides for all sections
- ✓ Design
  - ✓ Designed 50% of the Sections
  - ✓ Initial assessment o ADA compliance work
- ✓ Began the planning the slides to be included in the final presentation and preparing the full report, including appendix items.

## Up Next...

Task	Date
Complete drafts for all sections	December 2
Design remaining slides	December 2–6
Final edits, reviews, and updates	December 6–12
Review with Kilohana	December 13
Incorporate feedback	December 13–17
Ensure ADA compliance	December 13–17
Submit deck to HTA	December 17
Present to HTA	December 19
Incorporate any additional feedback	By Dec 22
Deliver comprehensive report	By Dec 27



## Up Next...

Task	Date
Final edits, reviews, and updates	December 6–12
Review with Kilohana	December 13
Incorporate feedback	December 13–17
Ensure ADA compliance	December 13–17
Submit Presentation to HTA	December 17
Present to HTA	December 19
Incorporate Any Feedback	By Dec 23
Deliver Final Report	By Dec 27

**December 11, 2024**  
**Ho‘okahua Meeting**  
*Overview/Update*

**December 12, 2023**  
**Branding Meeting**  
*Overview/Update*

**December 13, 2024**  
*Budget, Finance,*  
*and Convention Meeting*  
*Overview/Update*

**December 19, 2024**  
**HTA Board Meeting**  
*Presentation*



# Mahalo



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## **Update on HTA Destination Manager Vacancies**



## **STAFF REPORT TO THE BOARD**

December 9, 2024

**REPORT:** Agenda #5: Update on HTA Destination Manager Vacancies.

The HTA Destination Manager will be a key contributor in advancing projects that align with HTA's strategic plan and island-specific Destination Management Action Plans. The position is responsible for fostering community partnerships, promoting education and outreach, and implementing projects that enhance the visitor experience and improve the quality of life for residents.

Since September 10, 2024, HTA has been actively recruiting to fill five vacant Destination Manager positions for the islands of O‘ahu, Hawai‘i Island, Kaua‘i, Maui/Lāna‘i, and Moloka‘i.

### **FACTS:**

1. Application Status:
  - a. As of December 9<sup>th</sup>, the HTA has received 31 applications for the five newly established HTA Destination Manager positions.
    - i. Applications Received by Island
      1. O‘ahu – 11 Applications received
      2. Hawai‘i Island – 4 Applications received
      3. Kaua‘i – 1 Application received
      4. Maui – 2 Applications received
      5. Moloka‘i – 3 Applications received
      6. Unspecified – 10 Applications received
2. Interview Status:
  - a. Of the 31 applications, ten applicants have been selected for interviews. Five applicant interviews have been completed, two applicants have accepted other job offers, one applicant interview is set for December 12, 2024, at 3:30 PM, and three applicants are pending schedule confirmations.
    - i. Interview Applicants by island
      1. O‘ahu – 5 interviews
      2. Hawai‘i Island – 1 interview
      3. Kaua‘i – 1 interview
      4. Maui – 1 interview
      5. Moloka‘i – 3 interviews

December 9, 2024

3. On October 16, 2024, Meagan DeGaia and Patti Ornellas joined the HTA as Destination Managers for Maui/Lāna‘i and Kaua‘i, respectively.
4. HTA staff intend to hire and onboard the remaining destination managers by February 2025. All efforts to do so before then will be exhausted.