



**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