



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

**REGULAR MARKETING STANDING COMMITTEE MEETING
HAWAI'I TOURISM AUTHORITY**

Po'akolu, 24 Iune 2020, 1:00 p.m.
Wednesday, June 24th 2020 at 1:00 p.m.

*Kikowaena Hālāwai O Hawai'i
Lumi 314
1801 Alaākea Kalākaua
Honolulu, Hawai'i 96815*

Hawaii'i Convention Center
Room 314
1801 Kalākaua Avenue
Honolulu, Hawai'i 96815

Papa Kumumana'o
AGENDA

1. *Ho'omaka A Pule*
Call to Order and Pule
2. *'Āpono I Ka Mo'o 'ōlelo Hālāwai*
Approval of Minutes of the May 27th, 2020 HTA Marketing Standing Committee Meeting
3. *Hō'ike No Ka Papahana Ho'omōhala Hou*
Presentation of recovery plan, digital, travel trade, consumer direct. What our safe destination looks likes based on the spend. Two plans will be presented; first pertinent to our local residents and second to our Industry Partners. Both paving a clear path for branding and marketing the State in terms of go-forward tourism.
4. *'Āpono I Ka Mo'ohelu Hokona Makahiki Kālā 2021 Me Ka Papahana Hokona*
Approval of the 2021 Branding budget followed by approval of the Marketing Tourism Plan.
5. *Nā'ana I Ka Papahana Paipai Kama'āina*
Review of the Island Chapters Kama'āina Campaign and the logistics of its web bank information. Examination of the funding of this initiative and at what cost by island.



6. *Hō'ike No Nā Papahana Kāko 'o Kaiāulu, Kūkulu Ola a Aloha 'Āina*
Presentation of the 2021 Local Community, Hawaiian Culture and Natural Resources. Examination of the funding put towards each segment and messaging initiatives, along with launch timeframe.
7. *Nā'ana I Nā Papahana Ho'opakele Olakino O Hawai'i*
Review of plans for Hawai'i as a "Safe Destination". Clear messaging that promotes all we are doing and how that ties into visitor's overall arrival experience at the airports.
 - a. Logistics at the airport
 - b. Aloha messaging at the airport
8. *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 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 § 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; and to discuss information that must be kept confidential to protect Hawai'i's competitive advantage as a visitor destination.

Kono 'ia ka lehulehu e nānā mai i ka hālāwai a ho'ouna mai i ka 'ōlelo hō'ike kākau 'ia no kēlā me kēia kumuhana i helu 'ia ma ka papa kumumana'o. Hiki ke ho'ouna mai i nā 'ōlelo hō'ike kākau 'ia ma mua o ka hālāwai iā ariana.kwan@gohta.net. Inā pono ke kōkua ma muli o kekahi kīnānā, e ho'omaopopo aku iā Ariana Kwan (973-2254 a i 'ole ariana.kwan@gohta.net), he 'ekolu lā ma mua o ka hālāwai ka lohi loa.

Members of the public are invited to monitor the public meeting and provide written testimony on any agenda item. Written testimony may be submitted prior to the meeting to the HTA by email to ariana.kwan@gohta.net; Any person requiring an auxiliary aid/service or other accommodation due to a disability, please contact Ariana Kwan (973-2254 or ariana.kwan@gohta.net) no later than 3 days prior to the meeting so arrangements can be made.

Agenda Item #2:

Approval of Minutes of the
May 27th, 2020
HTA Marketing Standing
Committee Meeting



YET TO BE APPROVED

MARKETING STANDING COMMITTEE MEETING

HAWAII TOURISM AUTHORITY

Wednesday, May 27, 2020

Hawaii Convention Center

1801 Kalākaua Avenue, Honolulu, Hawaii 96815

MINUTES OF MARKETING STANDING COMMITTEE MEETING

COMMITTEE MEMBERS PRESENT:

Kelly Sanders (Chair), Fred Atkins, George Kam, Sherry Menor-McNamara, Kyoko Kimura, Benjamin Rafter

HTA BOARD MEMBERS PRESENT:

Richard Fried

HTA STAFF PRESENT:

Chris Tatum, Keith Regan, Pattie Herman, Marc Togashi

GUESTS:

Jay Talwar, John Morgan, Avi Mannis, Mufi Hannemann, Tina Yamaki, Representative Richard Onishi

LEGAL COUNSEL:

Gregg Kinkley

1. Call to Order

HTA Chief Administrative Officer Keith Regan announced the beginning of the meeting at 2:00 p.m. and conducted a roll call. All marketing committee members were present, and HTA Board Chair Richard Fried was also present. Gregg Kinkley noted that there were seven HTA Board members present in the "virtual room", but that the applicability of the Sunshine Law rules was not clear for the virtual medium. At 2:03 p.m., Mr. Regan turned the floor over to Marketing Committee Chair Kelly Sanders.

Chair Sanders began by discussing the tone he wished to set at the meeting. He acknowledged the difficulty being faced by Hawaii and across the world, and identified the goal of understanding how to safely open the state and all of the measures that can be taken to share aloha with visitors and residents. He also noted that the meeting was the first step towards letting Hawaii's elected officials know what HTA is doing in that regard.

2. Approval of Minutes from January 29, 2020 HTA Marketing Standing Committee Meeting.

Mr. Sanders requested a motion to approve the meeting minutes from the January 29, 2020 HTA Marketing Standing Committee Meeting. George Kam made a motion, which was seconded by Kyoko Kimura. The motion was unanimously approved via a roll call vote.

3. Report on Safety Protocol from Our Industry Partners, Small Business, Activities, Airlines, Retail Merchants, and Hotels.

Jay Talwar was not available at that time to present on recovery marketing initiatives, so this item was taken out of order. Chair Sanders recognized HTA Marketing Director Patricia Herman to introduce the presenters representing different sectors of the tourism industry. Ms. Herman explained that the top priority is a healthy and safe destination. Ms. Herman first introduced Sherry Menor-McNamara, the president of the Chamber of Commerce of Hawaii (COCH), who presented on behalf of small businesses. Ms. Menor-McNamara discussed what COCH has been doing to support businesses and disseminate information. She noted that they are working on getting clarification on whether county guidelines supersede state guidelines. Ms. Menor-McNamara explained that COCH conducted a survey, with UHERO, of 623 Hawai'i businesses. The survey showed that, even with PPP (Paycheck Protection Program) Loans, Hawai'i businesses need more assistance to survive. Ms. Menor-McNamara said that 220,000 individuals have been on unemployment and one in three businesses report that revenue has been reduced to zero during the government shutdown. Educational services have also been reduced by 54%.

Ms. Menor-McNamara said that COCH is also working on providing small businesses with reliable information. They have created a dedicated "micro-site", <http://covid19.cochawaii.org>, to provide a one-stop center for businesses. Ms. Menor-McNamara described the parts of COCH's five-point plan: 1) prioritizing safety, 2) communicating confidence in commerce, 3) advocating for policy solutions, 4) building pathways to the future, and 5) thinking local first. Ms. Menor-McNamara said that once interisland travel opens up she hopes that there can be creative ways to encourage kama'aina to travel. She added that they have also been looking at what policy solutions other states are implementing.

Ms. Herman then introduced John Morgan, the president of Kualoa Ranch, who represented activities. Mr. Morgan said that they realize that safety of the guests and the employees is the priority. He also discussed the importance of contact tracing, and using the reservation system to facilitate contact tracing. Mr. Morgan said that they will be conducting temperature screenings for both employees and guests, requiring masks for all interactions, implementing sanitation procedures, and adjusting group sizes to no more than ten people.

Ms. Herman introduced Avi Mannis, Vice President of Marketing for Hawaiian Airlines, who represented the airline industry. Mr. Mannis discussed the health and safety measures that the industry and Hawaiian Airlines are implementing to minimize the risk of COVID-19 transmission. He said that the evidence is that air travel is safe and there is little evidence of on-flight transmission, including during periods of spikes in cases. He added that there is currently not enough peer-reviewed evidence explaining why there is low on-flight transmission, but that it may have to do with all passengers facing the same direction, the fact that the seats act as a hard partition between rows, and high-quality air filtration. Mr. Mannis said that Hawaiian Airlines is implementing cleaning and sanitation procedures in high-touch areas, using electrostatic misters, and making changes to queueing and seating. Hawaiian Airlines has also

modified meal and beverage service to reduce contact, and have eliminated pillows and blankets on overnight flights. Mr. Mannis added that Airlines for America, the national trade association, has taken the position that it would be valuable for TSA to provide thermal screening at airports for visitors arriving internationally.

Benjamin Rafter asked whether there was any data available regarding consumer confidence. Mr. Mannis responded that they have looked at a number of surveys, and there is a great deal of concern among air travelers. He said that there are some people ready to fly in the next one to three months, and some who will not be ready to fly until there is a vaccine.

Representative Richard Onishi said that he has traveled back and forth between O'ahu and Hawai'i Island several times in recent weeks and that he has noticed inconsistencies in procedures. He asked Mr. Mannis who is responsible for monitoring procedures. Mr. Mannis responded that Hawaiian Airlines has changed their processes a great deal over the last month but that it is something that they will continue to work on.

Mr. Atkins asked Mr. Mannis if he feels that the government is aware that it should be taking responsibility for passenger screening. Mr. Mannis responded that there is a growing understanding that the broader air travel system is responsible for screening. He said that there is still work to be done to get a plan, and that it will be rolled out as a pilot program first, and then rolled out across the system. He said that one question that they have been considering is whether Hawai'i can wait or whether the state can implement measures in advance. Rep. Onishi said that the Legislature has appropriated \$36 million to the airport for thermal screening equipment. He asked whether Hawaiian Airlines has taken a position on that matter or whether they have been asked about the process, where it should be located, or how it should be implemented. Mr. Mannis responded that Hawaiian Airlines has been involved in the discussion with the Department of Transportation and other agencies. He said that it is Hawaiian Airlines' view that screening is an important part of a system of protection for the travel system, and that all elements of that system need to be in place so that things do not slip through the thermal screening and get out into the community.

Ms. Herman introduced Tina Yamaki, President of the Retail Merchants of Hawaii (RMH), representing the retail industry. Ms. Yamaki said that last year the retail sector employed approximately 25% of Hawai'i's workforce, and that retail is responsible for about \$12.2 billion of Hawai'i's total GDP. She also noted that essential retailers have been on the frontlines. Ms. Yamaki explained that RMH has developed guidelines and checklists for retailers. She also discussed the challenges retailers are facing due to being forced to close for two months. She noted that many have not been able to pay rent, taxes, or utilities. Ms. Yamaki added that there is a misconception that many businesses received PPP Loans, but in fact many were denied.

Ms. Yamaki explained that many retail businesses will not open until tourism is reopened. For businesses that are open, RMH is working to ensure that it is a safe place for both shoppers and employees.

Ms. Herman introduced Mufi Hannemann, President of the Hawai'i Lodging and Tourism Association, representing the hotel industry. Mr. Hannemann discussed quarantine challenges for hotels, regardless of whether they are closed or have remained open. He noted that the incoming traveler form at the airport is now more detailed, but there are still some areas that need to be refined. Mr. Hannemann discussed the importance of reopening tourism to stimulate the economy.

Chair Sanders noted that we are currently in the booking window for August and September, so the longer the State delays in announcing preliminary opening dates, the longer the delay will be for recovery, and the greater economic hardship workers will face. Mr. Tatum said that high-value visitors will want a healthy and safe destination, and residents want to protect themselves and their homes. HTA Chief Executive Officer Chris Tatum said that money has been set aside for each county to develop plans that are supported by stakeholders in that destination. He emphasized the importance of participation by communities and counties to improve the visitor experience, and the importance of speaking with one voice in communicating with the administration about everything that is being done in the industry so that they will feel confident.

Mr. Hannemann discussed the preparations being made and the procedures being implemented to resume business. He encouraged the HTA Board to be involved in the reopening process and to ask their employees to be involved. Mr. Atkins asked whether there was a date for reopening interisland travel. Mr. Hannemann responded that the sooner interisland travel is restarted the better, and it will help in asking for a date when we can begin to receive visitors beyond Hawai'i. He said that the push is for opening interisland travel in June. Mr. Atkins asked about Mr. Hannemann's opinion regarding what would make neighbor island mayors hesitant about reopening interisland travel. Mr. Hannemann responded that the county mayors prioritize their islands. Kyoko Kimura said that she had seen a presentation from the Department of Labor Workforce Development Division and learned that, excluding government employees, Maui unemployment was at 50%. Mr. Atkins said that he had spoken with the Kauai mayor and the mayor was concerned about receiving legislature funds and making sure that there was enough PPE and thermal screening. Mr. Hannemann said that one issue is that Oahu received CARES Act funding before other islands. Rep. Onishi said that the CARES Act allocation passed both the State House and Senate, and it is on the Governor's desk for signature. He said that the money will go directly to the counties and some counties have already allocated anticipated funds. He noted that Oahu received funding directly from the federal government but that the other counties, because of their size, did not get direct allocations. Mr. Rafter said that the industry has surveyed the hotels and most of them will not open with only interisland travelers because they need more visitors. Mr. Hannemann agreed and said that there needs to be planning, so he would like to know about reopening interisland travel at the same time as reopening domestic travel.

4. Presentation on Recovery Marketing Initiatives.

Ms. Herman introduced Jay Talwar, Senior Vice President for Hawai'i Tourism, to give a presentation on HVCB's COVID-19 communication initiatives. Mr. Talwar said that HVCB worked with HTA on the #LiveAloha campaign to create advertising that focused on the things that people within the community were doing to support one another. Various campaigns were engaged to promote businesses like restaurants and small businesses that specialize in goods and services. He explained that the first wave of communication was initial COVID-19 messaging, the second wave focused on sharing aloha virtually, and the third wave will be to experience aloha, which will get underway once they are allowed to market the destination to visitors again.

Mr. Talwar said that when the governor announced that he did not want new visitors, they encouraged travelers to postpone their visits and then followed up with messaging about the 14-day quarantine so that people could understand the requirements. #ShareAloha also focused on how people were sharing aloha while staying at home.

5. Review of the Proposed Budget for Brand Marketing for Fiscal Year 2021

Chair Sanders discussed the budget for brand marketing in 2021. He noted that the Transient Accommodations Tax (TAT) has stopped and the Governor has withdrawn all funding for anything that was part of TAT. Chair Sanders also said that the Governor will be issuing guidance to organizations, such as HTA, in need of funding. He said that HTA has pulled back and tried to align and reposition money available for the launch of the 2021 fiscal year. He noted that HTA will likely need to go back and request additional funding from the Governor and the Legislature.

Ms. Herman said that the 2020 branding budget was \$51 million, but for 2021 it will be dropping by 44.5% to approximately \$28 million. HTA will be investing in the strongest markets for Hawai'i - U.S. Mainland, Japan, Canada, Oceania, and Korea. HTA will have to terminate its global marketing teams for Europe, Southeast Asia, China and Taiwan. Ms. Herman said that \$28 million will not be enough to change perceptions of Hawai'i but it will be enough to continue to brand Hawai'i with safety and health, along with culture, community, and natural resources. Ms. Herman reported that the total budget for 2020 was \$86 million, which will be downsized to approximately \$51 million for 2021.

Ms. Kimura asked how much was returned to HTA for cancelled events that HTA funded but were not held. Mr. Tatum responded that they received money back from all the events that were cancelled. Ms. Kimura asked whether they were using HTA's emergency fund and Mr. Tatum responded that those funds are included in the budget. Mr. Tatum further explained that HTA is allocated \$79 million per year, based on the law. However, that funding stopped in April and it is unknown when it will be resumed, which is reflected in the budget. He noted that the entire budget would be reviewed during the full Board meeting.

Mr. Atkins whether HTA will be presenting the information presented at the meeting to the Governor, and discussed the importance of presenting information to leadership and to the community. He also noted that the Marketing Committee did not hear from the airport at the meeting. Chair Sanders responded that there are a lot of agencies working to ensure that visitors can be brought back safely and our community can be protected at the same time. Mr. Kam said that Hawai'i is at a critical but important point, and he said that he agrees HTA should be taking the lead.

Mr. Tatum said that all the information presented at the meeting is being presented to the Governor and the administration, and that he has participated in several presentations. He said that he believes there should be one voice in the state to show the community that they are working together. He said that they need to show the community that they are working together, so they have been working to consolidate information to share with the administration. He noted that he believes residents should hear this information from people who are coming from a health and safety standpoint, and not just tourism industry stakeholders. Mr. Atkins said that he has been receiving calls from individuals asking why they have not heard more from HTA. He said that HTA needs to coalesce with the medical community and find a balance. Mr. Atkins asked whether the medical community would be willing to discuss these issues with the tourism industry, and Mr. Tatum responded that he would work to set that up.

Mr. Rafter discussed the importance of setting an opening date. He said there is a perception that people are not working together, and there needs to be something for people to work towards. He added that there should be people on the ground level talking about their experience. Rep. Onishi noted that only one person that can make that determination regarding the opening date, and he is getting a lot of information about what people should do. For example, when it was announced that malls could reopen, they were not ready because they did not discuss it with shopping centers. They were taken by surprised and unprepared, and they did not have the capability to open. Rep. Onishi said the biggest problem is how to address travelers coming into Hawai'i, both visitors and returning residents and discussed the importance of addressing that threat. Gregg Kinkley noted that the topic of discussion had moved from the focus of the meeting and recommended that the discussion be continued at the upcoming full Board meeting.

6. Adjournment

Chair Sanders adjourned the meeting at 4:17pm.

Respectfully submitted:



Janjeera S. Hail
Recorder

Agenda Item #4:

Approval of the
2021 Branding Budget

FY 2021 BRANDING BUDGET - AS OF 5/26/2020

	Draft Budget	% of Draft Budget (\$54,487,000)	Revised Budget (Avail. Enc.)	% of Revised Budget (\$30,069,720)	2nd Revised Budget	% of 2nd Revised Budget (25M)	5/15 Revision	% of 5/15 Revision (\$33,919,697)	5/26 Revision	% of 5/19 Revision (\$33,919,697)
Cruise	\$250,000	0.5%	\$75,545	0.3%	\$50,000	0.2%	\$50,000	0.1%	\$50,000	0.2%
Hawai'i Tourism Summit	\$300,000	0.6%	\$0	0.0%	\$0	0.0%	\$0		\$0	
Island-Based International Marketing	\$800,000	1.5%	\$50,854	0.2%	\$0	0.0%	\$0		\$0	
MICE Asia			\$50,000	0.2%	\$0	0.0%	\$0		\$0	
gohawaii.com	\$350,000	0.6%	\$300,000	1.0%	\$300,000	1.2%	\$300,000	0.9%	\$300,000	1.0%
Island Chapters Staffing and Admin	\$3,170,000	5.8%	\$3,116,000	10.4%	\$2,800,000	11.2%	\$2,400,000	7.1%	\$2,400,000	8.4%
US	\$22,525,000	41.3%	\$13,422,241	44.6%	\$13,155,810	52.6%	\$20,000,000	59.0%	\$17,685,707	61.9%
Canada	\$800,000	1.5%	\$373,820	1.2%	\$373,820	1.5%	\$373,820	1.1%	\$373,820	1.3%
Japan	\$10,000,000	18.4%	\$6,000,000	20.0%	\$4,000,000	16.0%	\$7,000,000	20.6%	\$5,000,000	17.5%
Korea	\$1,400,000	2.6%	\$504,000	1.7%	\$400,000	1.6%	\$400,000	1.2%	\$400,000	1.4%
Oceania	\$1,900,000	3.5%	\$1,111,827	3.7%	\$1,000,000	4.0%	\$1,514,729	4.5%	\$500,000	1.7%
Europe										
China	\$1,000,000	1.8%	\$680,767	2.3%	\$0	0.0%	\$0		\$0	
Taiwan	\$500,000	0.9%	\$300,000	1.0%	\$0	0.0%	\$0		\$0	
Meetings, Convention & Incentives	\$2,650,000	4.9%	\$2,200,000	7.3%	\$1,000,000	4.0%	\$0		\$0	
Southeast Asia										
Global Digital Marketing Strategy	\$500,000	0.9%	\$380,500	1.3%	\$380,500	1.5%	\$380,500	1.1%	\$380,500	1.3%
Global Mkt Shared Resces (Knowledge Bank)	\$797,000	1.5%	\$787,000	2.6%	\$787,000	3.1%	\$787,000	2.3%	\$787,000	2.8%
Marketing Opportunity Fund	\$6,800,000	12.5%	\$8,820	0.0%	\$8,820	0.0%	\$0		\$0	
US Travel Membership	\$125,000	0.2%	\$125,000	0.4%	\$125,000	0.5%	\$125,000	0.4%	\$125,000	0.4%
Travel - Branding	\$50,000	0.1%	\$14,296	0.0%	\$50,000	0.2%	\$50,000	0.1%	\$50,000	0.2%
Hawaii Film Office Partnership	\$30,000	0.1%	\$30,000	0.1%	\$30,000	0.1%	\$30,000	0.1%	\$30,000	0.1%
State Employee Salaries - Branding	\$540,000	1.0%	\$539,050	1.8%	\$539,050	2.2%	\$508,648	1.5%	\$508,648	1.8%
Total Branding	\$54,487,000	100.0%	\$30,069,720	100.0%	\$25,000,000	100.0%	\$33,919,697	100.0%	\$28,590,675	100.0%

Hawaii Tourism Authority
Tourism Special Fund
FY 2021 Budget

Program Code	Program Title	FY 2021 Budget		Original FY 2020 Budget	
Perpetuating Hawaiian Culture					
200	Hawaiian Culture Programs - Unallocated	-		6,780,000	
201	Kukulu Ola: Living Hawaiian Cultural Prog	3,059,781		-	
202	Hawaiian Culture Initiative	950,000		-	
203	Ma'ema'e HTA	15,000		-	
204	Market Support	20,000		-	
208	Hawaiian Music and Dance Center	-		1,000,000	
297	Memberships and Dues - Hawaiian Culture	300		500	
298	Travel - Hawaiian Culture	-		15,000	
932	Salaries - Hawaiian Culture	217,140		285,000	
Subtotal	Perpetuating Hawaiian Culture	4,262,221	8.5%	8,080,500	9.3%
Natural Resources [HRS 2018-11(c)(2) - Minimum Required: \$1,000,000]					
400	Natural Resources Programs - Unallocated	-		3,980,000	
402	Aloha Aina (formerly NR and Leg Prov NR)	2,376,276		-	
406	Visitor Impact Program	205,667		-	
936	State Employee Salaries - Natural Resources	77,459		66,950	
Subtotal	Natural Resources	2,659,402	5.3%	4,046,950	4.7%
Community					
TBD	Community-Based Tourism - Oahu	925,000		-	
TBD	Community-Based Tourism - Maui County	925,000		-	
TBD	Community-Based Tourism - Hawaii Island	925,000		-	
TBD	Community-Based Tourism - Kauai	925,000		-	
705	Community Programs - Unallocated	-		5,789,252	
797	Memberships and Dues - Community	500		500	
798	Travel - Community	25,000		15,000	
933	State Employee Salaries - Community	147,120		210,000	
Subtotal	Community	3,872,620	7.7%	6,014,752	6.9%
Branding					
4	Cruise Infrastructure Improvements and Arrival Experience	50,000		250,000	
102	Hawai'i Tourism Summit	-		300,000	
306	Island-Based International Marketing	-		800,000	
316	MICE Asia (formerly MCI Global - Management)	-		350,000	
318	gohawaii.com (formerly Online Website Coordination)	300,000		350,000	
320	Island Chapters Staffing and Admin	2,400,000		3,170,000	
321	US (formerly North America)	17,685,707		22,525,000	
322	Canada	373,820		800,000	
323	Japan	5,000,000		10,000,000	
324	Korea	400,000		1,400,000	
325	Oceania	500,000		1,900,000	
326	Europe	-		400,000	
329	China	-		2,000,000	
330	Taiwan	-		500,000	
331	Meetings, Convention & Incentives	-		2,300,000	
336	Southeast Asia	-		500,000	
339	Global Digital Marketing Strategy (former Intl Online Strat)	380,500		500,000	
350	Global Mkt Shared Resces (formerly Intellect Prop Data Bank)	787,000		797,000	
380	Marketing Opportunity Fund	-		2,000,000	
397	Memberships and Dues - Branding (US Travel Membership)	125,000		100,000	
398	Travel - Branding	50,000		50,000	
723	Hawaii Film Office Partnership	30,000		30,000	
934	State Employee Salaries - Branding	508,648		539,050	
Subtotal	Branding	28,590,675	56.9%	51,561,050	59.4%
Sports					
312	PGA Tour Contracts	2,166,864		-	
342	Mau'i Jim - Maui Invitational	50,000		-	
345	ESPN Hawaii Bowl / Diamond Head Classic	475,000		-	
377	Polynesian Football HoF	155,000		-	
378	UH Athletics Branding Partnership	316,000		-	
379	Sports Programs - Unallocated	-		7,200,000	
384	Football (Hula Bowl)	25,000		-	
Subtotal	Sports	3,187,864	6.3%	7,200,000	8.3%
Safety and Security					
601	Visitor Assistance Programs	650,000		650,000	
602	Crisis Management	850,000		100,000	
603	Lifeguard Program	-		700,000	
604	Preventative Programs	-		400,000	
606	Safety and Security Opportunity Fund	-		300,000	
Subtotal	Safety and Security	1,500,000	3.0%	2,150,000	2.5%
Tourism Research [HRS 2018-7 - Necessary to Support Requirement: \$2,215,620]					
501	Data Dissemination	-		54,000	
505	Est of Visitor Arrivals by Country by Month	3,500		6,000	3,500
506	Infrastructure Research (Accomodations and Airseats)	520,879		556,330	320,879
512	Visitor Arrivals and Departure Surveys	1,150,581		1,314,540	1,150,581
513	Evaluation and Performance Studies	662,810		1,148,405	662,810
514	Marketing Research	42,850		498,797	42,850
597	Memberships and Dues - Research	42,322		7,322	35,000
598	Travel - Research	-		15,000	
935	State Employee Salaries - Research	384,180		393,000	
Subtotal	Tourism Research	2,807,122	5.6%	3,993,394	4.6%
Administrative					
101	Community-Industry Outreach & Public Relations Svcs	265,000		250,000	
103	hawaiiauthority.org (formerly HTA web/Global Social)	100,000		100,000	
901	General and Administrative	303,700		401,700	
930	State Employee Salaries - Admin	1,047,227		1,075,000	
998	Travel - Admin	10,000		50,000	
Subtotal	Administrative	1,725,927	3.4%	1,876,700	2.2%
Governance and Organization-Wide					
915	Organization-Wide	195,000		240,000	
919	Governance - Gen Board/Others	89,600		146,300	
931	State Employees Fringe	1,367,590		1,481,142	
Subtotal	Governance and Organization-Wide	1,652,190	3.3%	1,867,442	2.2%
Total Budget		50,258,021		86,790,788	
Less: Projected Funding Available		43,674,688		86,790,788	
Allocation Shortage*		(6,583,333)	100%	-	100%
Tourism Emergency Fund					
TBD	Tourism Emergency	5,000,000		-	
Subtotal	Tourism Emergency Fund	5,000,000		-	
Allocation Shortage (If use of Emergency Fund is approved)		(1,583,333)		-	

*The guidance HTA received on the amount of our FY 2020 TAT allocation was reduced by \$6.58M. HTA included the \$6.58M in our original calculations for projecting the available funding for FY 2021's budget.

Agenda Item #4:

Marketing Tourism Plan 2021



Tourism Marketing Plan 2021

Updated 6/17/2020

*Information in this document, which is relative to our market activities, is **PROPRIETARY** and should be treated in a **CONFIDENTIAL** manner to protect Hawai'i's competitive advantage as a visitor destination.*

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1 HAWAI'I TOURISM AUTHORITY

1.1 Overview

1.1.1 Who We Are, What We Do

The Hawai'i Tourism Authority (HTA) is the state's tourism agency responsible for setting tourism policy and direction; developing and implementing the state's tourism strategy and Tourism Marketing Plan; managing programs and activities to sustain a healthy tourism economy, including programs that address the long-term sustainability of the destination; maintaining sufficient air and cruise access; the global promotion of leisure and business travel; the management of the Hawai'i Convention Center; and coordinating tourism-related research, planning, promotional, experiential and outreach activities across the state. The agency serves as a critical bridge linking government and private sectors, the visitor industry, and visitor and island communities. It aims to contribute successfully to a good quality of life for residents through tourism.

1.1.2 Guiding Principle

Inspired by Hawai'i's natural environment, world-renowned hospitality and aloha spirit, the HTA will honor and perpetuate Native Hawaiian and multicultural traditions and continue to support Hawai'i's island communities. We will invest in Hawai'i's people, place and culture to ensure the Hawaiian Islands remain a uniquely special place to live, work and visit.

1.1.3 HTA Strategic Plan

The HTA Strategic Plan (HTASP) is the foundation for all of HTA's initiatives. The purpose of the HTASP is to guide the organization in addressing issues and creating opportunities that will move Hawai'i's visitor industry forward.

1.1.4 Purpose of the Tourism Marketing Plan

Formerly referred to as the HTA's Brand Management Plan, the HTA's Tourism Marketing Plan describes the goals, strategies, actions and evaluation approach that HTA will undertake to achieve the objectives within the HTASP. This document frames our efforts for 2021 to address the needs of our industry and improve the continuity or flow of business to maintain our industry's standing as the foundational or initiating economic driver for the state.

According to the Hawai'i Revised Statutes (HRS) §201B-6, there are five (5) statutory requirements that comprise the HTA's Tourism Marketing Plan. According to the statute, the plan shall include:

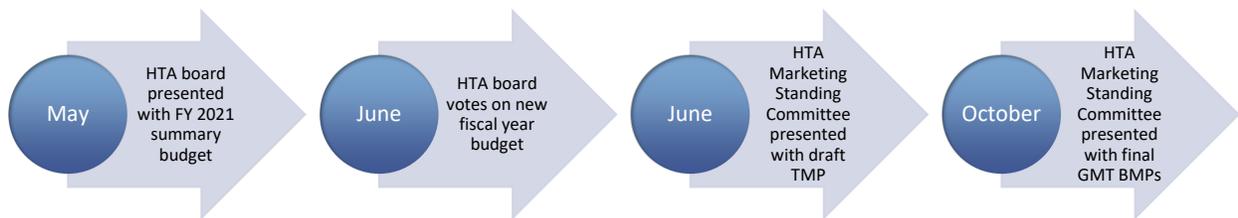
1. Statewide Hawai'i brand management efforts and programs;
2. Targeted markets;
3. Efforts to enter into Hawai'i brand management projects that make effective use of cooperative programs;
4. Program performance goals and targets that can be monitored as market gauges and used as attributes to evaluate the authority's programs; and
5. The authority's guidance and direction for the development and coordination of promotional and marketing programs that build and promote the Hawai'i brand, which are implemented through contracts and agreements with destination marketing organizations or other qualified organizations, including:

- a. Target markets and the results being sought;
- b. Key performance indicators; and
- c. Private sector collaborative or cooperative efforts that may be required.

To provide additional guidance to the HTA in the development of the Tourism Marketing Plan, the statute states that "Hawai'i brand" means "the programs that collectively differentiate the Hawai'i experience from other destinations." The statute goes on to state that "the authority shall develop measures of effectiveness to assess the overall benefits and effectiveness of the marketing plan and include documentation of the progress of the marketing plan towards achieving the authority's strategic plan goals." The HTA, in the development of the Tourism Marketing Plan, will strive to meet these requirements by including detailed execution plans for brand marketing (including the individual Brand Management Plans by major market area), as well as HTA's community enrichment, Hawaiian culture, natural resources, communications, and research programs.

1.1.5 Approval Process

The approval of the completed annual Tourism Marketing Plan (TMP) and budget is a multi-phase process as follows:



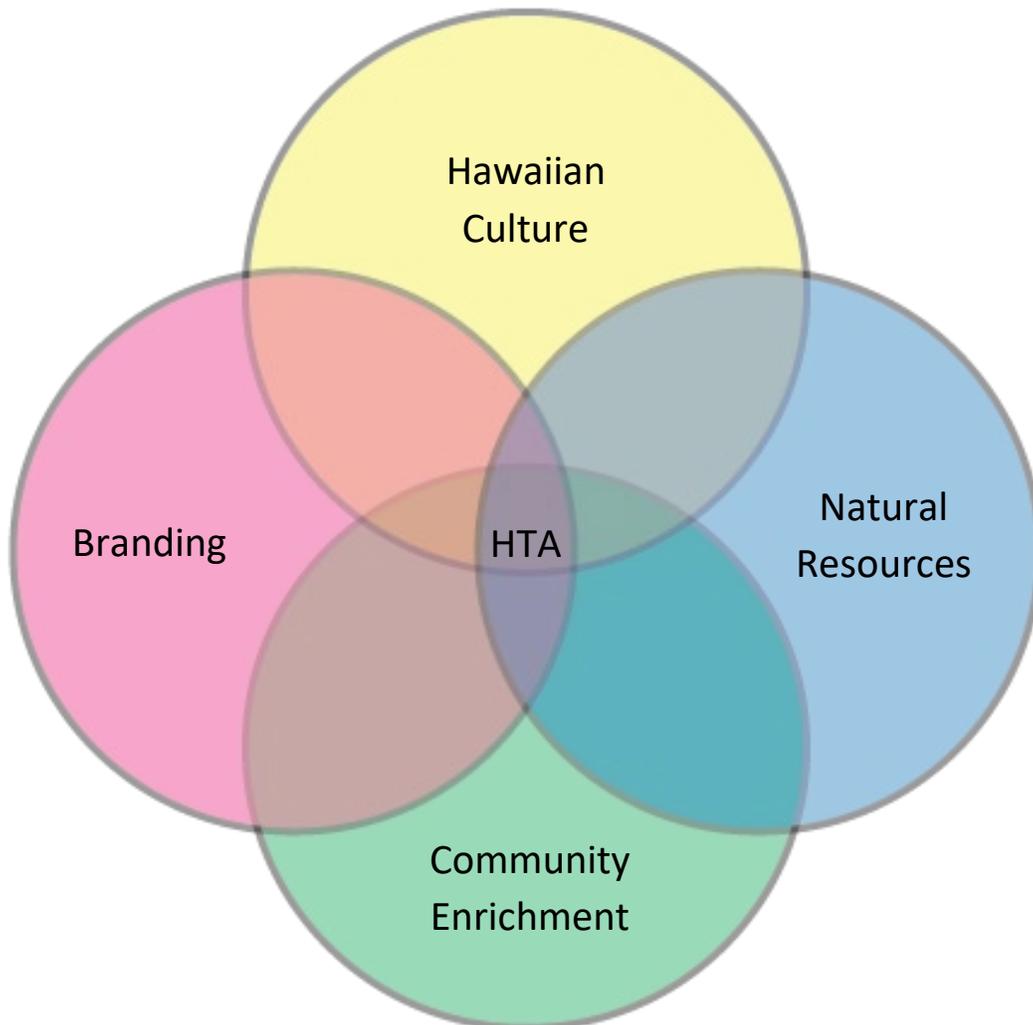
1.2 Planning Approach

1.2.1 HTA Functions

One of the HTA's key functions is managing the Hawai'i brand, more specifically, managing the promotion of Hawai'i's brand, supporting and developing airlift to the state, and supporting programs to help deliver on the brand promise. The HTA works with its global contractors, visitor industry partners, travel trade members, and community stakeholders to position the Hawaiian Islands as a unique, world-class destination that is aligned with Hawai'i's distinctive products, activities, natural resources, Hawaiian culture and multi-cultures. In FY 2021, HTA will be organizing and placing more emphasis and investment on programs which focus on the management of the destination.

1.2.2 Organizational Structure to Implement Plan

To better implement its strategies to achieve its goals, HTA programs are organized into four categories as shown in the chart below.



1.2.3 Evaluation of Programs within the Tourism Marketing Plan

The process to develop meaningful measures started with clearly understanding the connection between the current Strategic Plan and Tourism Marketing Plan. The Strategic Plan establishes the overarching vision and strategic direction for the organization while the Tourism Marketing Plan is the tactical action plan used to achieve the vision with clear actions and a set of measurements. It is incumbent on the HTA to utilize measures of effectiveness that will assist in assessing the overall benefits and effectiveness of the marketing plan. This should include documentation of the progress made during implementation of the marketing plan towards achieving the vision of the Strategic Plan.

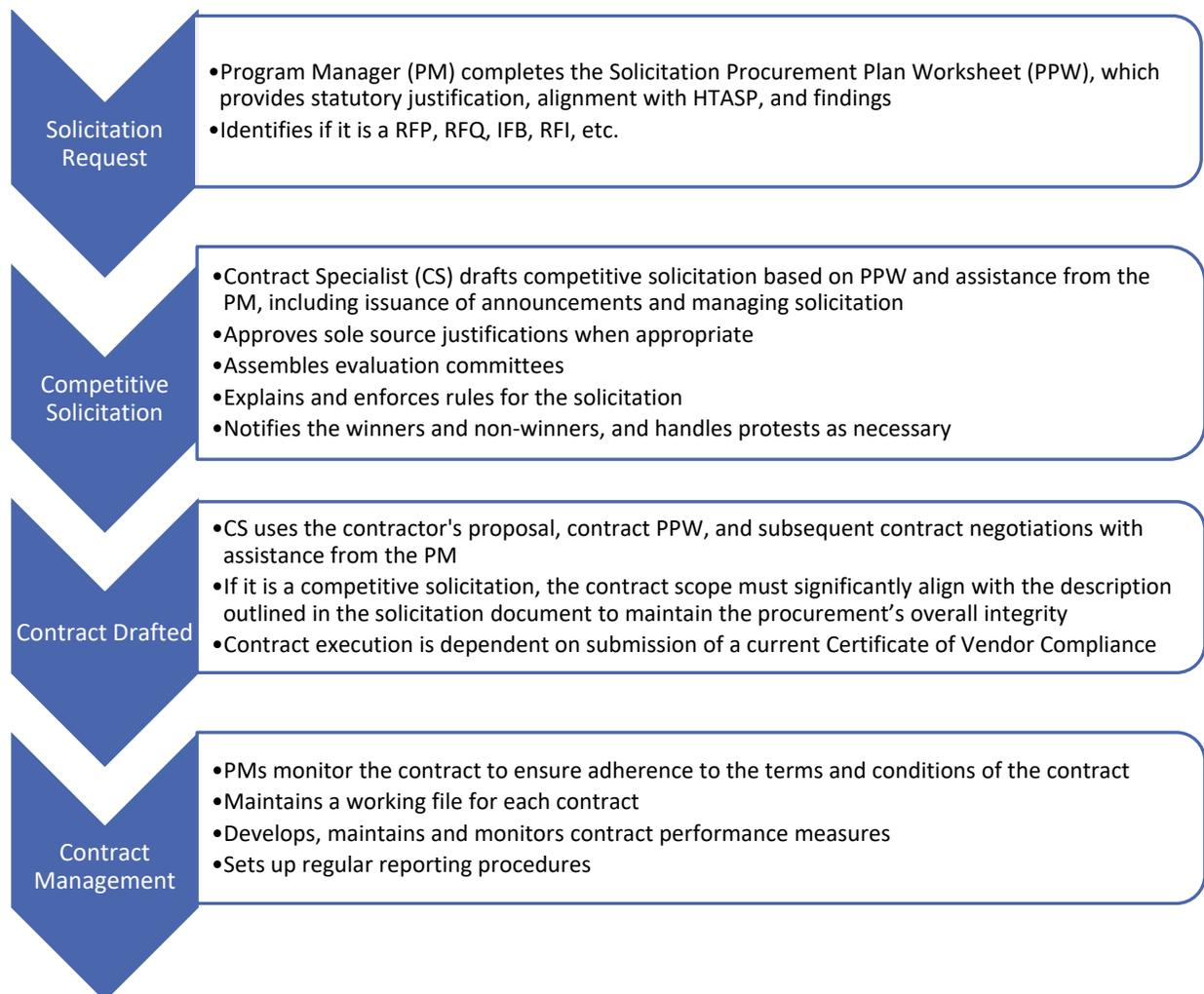
The HTA will strive to communicate the results of its efforts on a regular basis to the HTA Board of Directors, State Legislature, Governor, and the public.

For Fiscal Year 2021, HTA will be able to review past performance, compare it to benchmark data, and establish meaningful targets for these measures. As we move forward, we will continue to evaluate our progress against the goals set in the Tourism Marketing Plan.

1.2.4 Contract Management and Contract Evaluation

HTA's administrative team is responsible for oversight and management of the procurement process, which includes drafting contracts, issuing request for proposals, awarding contracts, and other related procurement matters. The HTA market managers and program managers are responsible for contractor oversight, performance, periodic evaluation, and approval of payments support pertaining to the delivery and performance of all contractors.

Our procurement team is responsible for ensuring that solicitations for competitive contracts are handled with integrity and transparency, and in conformity with all legal and ethical guidelines. The chart below generally depicts the procurement process.



1.3 Market Outlook

1.3.1 Market Conditions and HTA's Response

Visitors to the Hawaiian Islands spent \$17.75 billion¹ in 2019, an increase of 1.4 percent compared to 2018. Spending by visitors generated \$2.07 billion in state tax revenue in 2019, an increase of \$28.5 million (+1.4%) from 2018. Additionally, 267,000 jobs² statewide were supported by Hawai'i's tourism industry in 2019.

In 2019, visitor spending increased from the U.S. West (+5.9% to \$6.98 billion), U.S. East (+3.6% to \$4.69 billion), and Japan (+2.0% to \$2.19 billion), but declined from Canada (-3.2% to \$1.07 billion) and All Other International Markets (-10.4% to \$2.77 billion) compared to 2018.

On a statewide level, average daily visitor spending in 2019 decreased to \$195 per person (-1.5%). Visitors from the U.S. East (+1.7% to \$214) and Canada (+0.6% to \$165) spent more per day, while visitors from Japan (-0.6% to \$240), U.S. West (-0.5% to \$175) and All Other International Markets (-8.5% to \$217) spent less compared to 2018.

A total of 10,424,995 visitors traveled to Hawai'i in 2019, an increase of 5.4 percent from the 9,888,845 visitors in 2018. Total visitor days³ rose 3.0 percent in 2019. On average, there were 249,021 visitors in the Hawaiian Islands on any given day in 2019, up 3.0 percent from 2018.

Arrivals by air service increased to 10,282,160 visitors (+5.3%) in 2019, with growth from the U.S. West (+9.8%), U.S. East (+4.2%), and Japan (+3.8%) offsetting decreases from Canada (-2.4%) and All Other International Markets (-1.8%). Arrivals by cruise ships rose to 142,836 visitors (+12.1%) compared to 2018.

In 2019, O'ahu recorded increases in visitor spending (+2.8% to \$8.19 billion) and visitor arrivals (+5.6% to 6,193,027), but daily spending declined (-1.6%) compared to 2018. Visitor spending on Maui also increased (+2.4% to \$5.12 billion) as growth in visitor arrivals (+5.4% to 3,071,596) offset lower daily spending (-0.6%). The island of Hawai'i reported declines in visitor spending (-1.0% to \$2.33 billion) and daily spending (-2.9%), but visitor arrivals increased (+4.3% to 1,779,526). Kaua'i saw decreases in visitor spending (-4.7% to 1.9 billion), daily spending (-2.2%) and visitor arrivals (-1.0% to 1,374,944).

Honeymoon: Visitors traveling to Hawai'i for their honeymoon declined in 2019 (-3.1% to 513,154) versus 2018, marked by decreases from the U.S. East (-5.4% to 91,649), Korea (-22.8% to 58,536), Australia (-22.2% to 9,793), China (-28.7% to 4,491) and New Zealand (-42.0% to 2,017).

MCI: A total of 467,231 visitors (-0.9%) traveled to Hawai'i for meetings, conventions and incentives (MCI) events in 2019, which was down slightly compared to 2018. Fewer visitors came to participate in conventions (-6.7% to 233,892) and incentive trips (-1.5% to 151,971), while more came to attend corporate meetings (+16.6% to 93,916) in 2019 versus 2018.

Air Seat Capacity: In 2019, total trans-Pacific air seat capacity to the Hawaiian Islands rose 2.9 percent to 13,619,349 seats, with growth in scheduled air seats (+2.9% to 13,524,164) offsetting a decrease in charter seats (-5.5% to 95,185). Air seat capacity serving Kahului (+10.3%) and Honolulu (+1.7%) increased while fewer air seats served Hilo (-11.8%), Kona (-1.5%) and Līhu'e (-0.2%) compared to 2018.

¹ Total visitor spending of \$17.75 billion was in nominal dollar (not adjusted for inflation) and did not include supplemental business expenditures.

² The number of jobs supported (direct, indirect and induced).

³ Aggregate number of days stayed by all visitors.

Scheduled air seats from the U.S. grew in 2019: U.S. West (+5.5%); U.S. East: (+7.6%). Scheduled air seats declined from Japan (-2.1%), Canada (-0.9%), Oceania (-7.2%) and Other Asia (-10.9%).

Cruise ship capacity: In 2019, 68 out-of-state cruise ships brought 142,836 visitors to Hawai'i. Several of these ships were larger in capacity than the 68 cruise ships that carried 127,397 visitors in 2018. Total cruise visitors (arrivals by cruise ships and by air to board cruise ships) rose 8.2 percent to 272,389 visitors in 2019.

The average length of stay by all cruise visitors was 7.46 days in 2019, similar to the previous year. Cruise visitors spent an average of 5.39 days aboard ship touring the islands and an average of one day (0.91 days) on shore after the cruise was complete. In addition, visitors who arrived by air to board the Hawai'i home-ported cruise ship stayed an average of 1.16 days in Hawai'i prior to their cruise.

Over half of Hawai'i's cruise visitors in 2019 were repeat visitors (55.1%). Most visitors (86.8%) came for a leisure trip, while 8.9 percent visited friends and relatives during their cruise, and 2.0 percent were on their honeymoon.

Due to the unprecedented global COVID-19 pandemic and resulting tourism shutdown in 2020, Hawai'i's economic forecast cannot be generated using past trends. However, basic relationships between economic variables remain unchanged, such as the relationship between job count and unemployment, personal income and GDP. Due to the government assistance programs, there will be a significant increase in personal transfer receipts from the federal government, consisting of income payments to households in which no current services are performed. The federal assistance will be reflected in household spending.

DBEDT projects that Hawai'i's economic growth rate, as measured by the real gross domestic product (GDP), will drop by 12.1% in 2020, then increase by 0.7% in 2021, 0.6% in 2022 and 1.1% in 2023. Hawai'i is expected to welcome 3.4 million visitors in 2020, a decrease of 67.5% from 2019. Visitor arrivals will increase to 6.2 million in 2021, 8.3 million in 2022, and 9.4 million in 2023. Visitor arrivals will not reach the 2019 level until 2025, based on the assumptions. Visitor spending will decline more over the next few years due to decreases in daily spending.

HTA's major market areas (MMAs) are distinct and have specific nuances. As such, we work with our Global Marketing Team (GMT) to tailor annual Brand Management Plans (BMPs) specific to each market based on HTA's annual Tourism Marketing Plan, and that take into consideration current economic situations and developing trends both in-market and in Hawai'i. Industry partners are engaged through marketing advisory committee meetings, individual island stakeholder meetings, and an annual Tourism Update. HTA's brand management team and the GMT members also participate in ongoing industry partner gatherings and one-on-one meetings statewide to maintain relations and understand changing needs and opportunities. The individual GMT Brand Management Plans will be presented to the HTA Marketing Standing Committee in October, which will help to inform the HTA's overarching Tourism Marketing Plan. Similarly, the program managers will remain fluid and work with their contractors in connecting and improving our natural resources, perpetuating the Hawaiian Culture, and strengthening community engagement.

1.3.2 State of the Destination

Tourism continues to remain the primary economic driver for the Hawai'i economy across all islands. Over the years, tourism has provided steady employment opportunities and supported the development of small businesses throughout the state. Hawai'i has experienced record arrivals over the past few years with no significant increase in the number of traditional lodging units. The increase in arrivals and the growth in unpermitted short-term rentals may be negatively contributing to resident sentiment towards the visitor industry.

Resident sentiment has been trending negative with a general feeling that tourism management of the destination should drive efforts designed to address tourism-related impacts. HTA has recognized the need to shift from a focus on branding to one that elevates the importance of supporting our community, culture and natural resources, in addition to our branding efforts. Significant resources will be directed towards programs and projects that further enhance the quality of life for our residents while also improving the overall visitor experience throughout our islands.

Due to the impacts of COVID-19, we continue to stay fluid and pivot the direction of our marketing initiatives accordingly.

2 TOURISM MARKETING PLAN EXECUTION OVERVIEW

2.1 Current Strategic Plan – Top-Level Measures of Success

The HTA's current Strategic Plan has four overarching top-level Measures of Success:

- **Resident Satisfaction:** Residents agree that tourism brings more benefits than problems, and agree that tourism positively affects you/family (Source: Resident Sentiment Study)
- **Visitor Satisfaction:** Overall Hawai'i vacation rating; if exceeded expectations; likely to recommend Hawai'i; likely to revisit in next five years (Source: Visitor Satisfaction Study)
- **Average Daily Spending:** Maintain or increase average Per-Person Per-Day (PPPD) visitor spending
- **Total Spending:** Maintain or increase total direct visitor spending

2.1.1 Execution Plans Overview

To achieve the targets above, HTA has developed implementation plans, each with their own indicators or measures. HTA's programs are aligned under the four pillars of: 1) Natural Resources; 2) Hawaiian Culture; 3) Community; and 4) Brand Marketing. These four pillars are organized to emphasize HTA's focus and together with HTA's administrative support services positively impact HTA's overall operations and efficiencies.

3 NATURAL RESOURCES PILLAR

Pillar Overview

The reciprocal nature of our relationship to land is that we care for our natural resources and in return the land will care for us. In this symbiotic relationship, as people dedicate time and resources to the well-being of the land, the residents and visitors of this land will thrive.

Strategies

- Over the next five years, we are increasing our attention to improving and enhancing visitor-impacted infrastructure and natural resources, such as forests, parks, trails, cultural sites, beaches and reefs.
- As we invest in the uniqueness and biodiversity of our islands, we are supporting sustainable management, responsible tourism, and educational outreach in areas with high visitor traffic.
- Recognizing the impacts of climate change and sea level rise, we will be coordinating and collaborating with relevant organizations to make the tourism industry more resilient.

Lead: Director of Hawaiian Cultural Affairs & Natural Resources – Kalani L. Ka’anā’anā

3.1 Aloha ‘Āina Program

Project Description: HTA supports community-based programs that help to protect, enhance and maintain Hawai‘i’s unique and fragile environment. Programs are selected through a Request For Proposals (RFP) process.

Implementation

- Set the overall direction and criteria to procure the RFP; select and contract directly with the Aloha ‘Āina awardees.
- Provide Aloha ‘Āina informational briefings and contractor workshops to provide capacity-building and support opportunities.
- Maintain updates from Aloha ‘Āina awardees to ensure ongoing communications and engagement, including site visits and meetings.
- Evaluate Aloha ‘Āina projects through progress and annual reports.
- Maintain an advisory committee of community and knowledge experts to review proposals and provide advice for the program.

The following criteria will be used to evaluate and score an applicant’s proposal in response to the RFP:

- Past Performance and Capabilities: References, letters of support, and other related materials; and past performance on other HTA contracts or agreements, if applicable.
- Project Description:
 - Overview of proposed project, work plan and timeline.
 - Detailed description including, but not limited to, current conditions, major tasks, target audience, and expected outcomes.
 - Detailed and well-planned work plan and timeline.

- Community support and involvement.
 - Demonstrated need and broad-based community support.
- Project accessibility.
 - Supports adequate public access, regardless of jurisdiction.
- **Project Sustainability:** Provides an adequate plan or strategy for future project sustainability (i.e., degree to which the project is sustainable).
- **Project Impact:**
 - Required measures.
 - Reasonable, significant impact as identified by their KPIs Natural Resources Connection.
 - Supports a long-term goal for sustainability of natural resources or otherwise addresses the need to protect, preserve, or enhance the natural resource at areas frequented by visitors.
 - Reasonable and significant measures demonstrating positive impact on the natural resources involved in the project.
- **Project Budget:**
 - Evaluated via itemized budget and detailed budget narrative.
 - Shows all sources of revenues and estimates all expenses on a reasonable, accurate, and complete basis with a minimum of 1:1 match or better on requested funds, with at least 20% of the match in other cash.

Contractor: TBD – Various awardees

Measurements

Output Measures	Performance Measures
Appreciation of Hawai'i's natural resources	High awareness and satisfaction with natural resources
# of participating residents	

3.2 Sustainable Tourism Association of Hawai'i (STAH)

Project Description: HTA seeks to support the development of a sustainable tourism certification program that will help to encourage and support a move of Hawai'i's tourism product in a more sustainable and regenerative direction. This program will include a certification process where businesses will be evaluated on whether or not they fit criteria that would make them a sustainable tourism company.

Implementation

- Contract with STAH whose mission fits the specific goal of this program.
- Work with STAH to assure that the certification process meets the environmental initiatives of HTA's strategic plan.
- Increase the number of certified operators statewide.
- Develop additional video curriculum that can be shared digitally.
- Conduct workshops that increase the skill and proficiency of certified operators in continuing to improve their operations and practices.

Contractor: Sustainable Tourism Association of Hawai'i

Measurements

Output Measures	Performance Measures
# of businesses certified	High awareness and appreciation for natural resources
# of tour operator trainings	

3.3 Hawai'i Green Business Program

Project Description: HTA seeks to support the development of an ecotourism certification program that will help to encourage sustainable and regenerative practices in hotels, businesses and events. This program will include a certification process where businesses will be evaluated on whether or not they fit criteria that would make them a sustainable company.

Implementation

- Contract with the Hawai'i Green Business Program whose mission fits the specific goal of this program.
- Work with HEA to assure that the certification process meets the environmental initiatives of HTA's strategic plan.
- Increase the number of hotels, businesses and events statewide.

Contractor: Hawai'i Green Business Program

Measurements

Output Measures	Performance Measures
# of hotels, businesses and events certified	High awareness and appreciation for natural resources

3.4 Visitor Impact Program

Project Description: HTA aims to support island-specific issues that have a significant visitor impact on the environment. Examples of past programs include Hawai'i Green Growth; the Aloha+ Challenge; the Ala Wai Watershed Collaboration; programs and partnerships addressing Rapid 'Ōhi'a Death; support for the Hawai'i State Department of Land and Natural Resources (DLNR) with the Mālama Hawai'i campaign.

In FY 2021, HTA will work with DLNR and other identified partners below:

- Support the DLNR Ma Kai and Ma Uka Watch programs which train community members as ambassadors for the most utilized state parks, trails and beaches across Hawai'i.
- Continue to partner with Hawai'i Green Growth (Aloha+ Challenge) in its work on the Sustainable Business Forum which brings Hawai'i's business leaders together to address sustainability and identify meaningful measures by which we can manage waste as well as water and energy consumption.

- Issue an RFP to implement the Natural Resources brand pillar similar in scope to NaHHA and the Hawaiian Culture pillar.

Implementation

- Allocate funds to DLNR projects that mitigate visitor impacts in accordance with the state objectives and the HTA strategic plan.
- Amplify community outreach and stakeholder engagement through our active participation in the collaborative work with community organizations and the industry to develop solutions.

Contractors

- Hawai'i State Department of Land and Natural Resources
- Others identified via RFP

Measurements

Output Measures	Performance Measures	Productivity Measures
Appreciation of Hawai'i's natural resources	High awareness and satisfaction with Hawai'i's natural resources	% of visitors who experience natural resources
# of participating community organizations and stakeholder groups		

4 HAWAIIAN CULTURE PILLAR

Pillar Overview

Feelings of affection, compassion, mercy, sympathy, kindness, grace, charity, and so much more are appropriate translations of aloha. Through aloha, visitors are no longer guests after a day. They are contributing members of the family having the same kuleana as we do to protect all that is Hawai'i.

Strategies

In order to honor and perpetuate the Hawaiian culture and community:

- We are giving increased emphasis to the Hawaiian language by preserving language resources past and present, and by encouraging appropriate use of the language.
- We are strengthening the interaction between the HTA and other Native Hawaiian-serving organizations in alignment with our goals and objectives.

Staff Lead: Director of Hawaiian Cultural Affairs & Natural Resources – Kalani L. Ka'anā'anā

4.1 Kūkulu Ola Program

Project Description: The Kūkulu Ola Program is a community-based initiative that helps to perpetuate the Hawaiian culture for the long term. These programs are selected and supported through an RFP process.

Strategies

- Set the overall direction and criteria to procure the RFP; select and contract directly with the Kūkulu Ola awardees.
- Provide Kūkulu Ola informational briefings and contractor workshops to provide capacity-building and support opportunities.
- Maintain updates from Kūkulu Ola awardees to ensure ongoing communication and engagement, including site visits and meetings.
- Evaluate Kūkulu Ola projects through progress and final reports.
- Maintain an advisory committee of community and cultural knowledge experts to review proposals and provide advice to the program.

The awardees are selected based on the following criteria per the RFP, and assessed in relation to the HTA's strategic plan vision, and goals and objectives of the Hawaiian Culture strategic initiative:

- Past Performance and Capabilities: References, letters of support, and other related materials; and past performance on other HTA contracts or agreements, if applicable.
- Project Description: A detailed description and well-planned work plan and timeline; community support and involvement which demonstrates broad-based community support and needs; and project sustainability.
- Project Impact: Reasonable, significant impact as identified in the project KPIs
- Hawaiian Culture:
 - Supports preservation of significant cultural practice(s), resource(s) or asset(s).

- Increases the number of cultural practitioners.
- Increases the skill level or proficiency in the cultural practice.
- Provide opportunities for continued practice.
- Addresses the need to honor or preserve the above-mentioned cultural practice(s), resource(s) or asset(s).
- Demonstrates the project’s long-term value and impact to the cultural resource to be preserved or perpetuated, as well as its impact to the Hawaiian culture and community.
- Offers an innovative or enhanced approach toward Hawaiian culture preservation through opportunities that demonstrate a positive impact on Hawai’i’s visitor industry future.
- **Project Budget:** Evaluated via itemized budget and budget narrative; shows all sources of revenues and estimating all expenses on a reasonable, accurate, and complete basis; and a minimum of 1:1 match or better on requested funds, with at least 20% of the match in other cash.
- **Prior Years Funded:** Preference provided to those programs/events that have not received four years of consecutive funding.

Contractor: TBD – Various awardees

Measurements

Output Measures	Performance Measures
Awareness of Hawaiian culture	Perception of Hawai’i reflects cultural authenticity
Increased number of cultural practitioners	High awareness and appreciation for Hawaiian culture
Increased opportunities for continued practice	Increased skill level or proficiency in a practice

4.2 Hawaiian Cultural Initiative – Strategic Partnerships

Project Description: This effort looks at identifying strategic programs and partnerships with organizations and agencies that offer cultural initiatives and resources that can be leveraged to increase the impact of HTA’s cultural programs. Through these strategic partnerships, HTA can support the long-term perpetuation of the Hawaiian culture. These organizations include those that can help to bridge the visitor industry and the Hawaiian community through a variety of collaborative strategies, programs and partnerships.

Implementation

- Identify priority initiatives and participants.
- Develop dialogue and engage with identified organizations.
- Allocate funds to participating organizations to support a common project.
- Continue to engage with the industry and Hawaiian community throughout the year.

Contractors

- Native Hawaiian Hospitality Association (NaHHA)
- Hawai’i Investment Ready
- Various sponsorships of Hawaiian community organizations and programs

Measurements

Output Measures	Performance Measures
Awareness of Hawaiian culture	Perception of Hawai'i reflects cultural authenticity
	High awareness and appreciation for Hawaiian culture

4.3 Center for Hawaiian Music & Dance

Project Description: In accordance with Hawai'i Revised Statute (HRS) 201B, HTA is tasked with initiating the planning process for the development of a Hawaiian Music and Dance Center through an annual fiscal year budget of \$1 million.

Implementation

- Facilitate the implementation of this program.
- Conduct an RFP for the development, construction and management of the center.
- Allocate funds to initiate the implementation for this program in accordance with the law and legislative commitments.
- Communicate with the Hawai'i State Legislature throughout the year.

Contractor: TBD

Measurements

Output Measures	Performance Measures
Publishing of the RFP	Perception of Hawai'i reflects cultural authenticity
Awarding of contract to develop the center	High awareness and appreciation for Hawaiian culture

4.4 Ma'ema'e HTA

Project Description: To support cultural elements of HTA's brand management (marketing) activities, this area assures that HTA is promoting Hawai'i in a way that is consistent with our brand identity. It includes educational programs for HTA contractors, media and travel trade in all markets to assure that Hawai'i is being promoted accurately and appropriately. This represents additional support to the existing cultural budgets that the Global Marketing Team has within each of their program areas.

Implementation

- Identify each MMA's needs.
- Procure services of cultural trainers for in-market support and development.
- Evaluate effectiveness and benefits of the training in supporting promotion of Hawai'i consistent with our brand identity.

Measurements

Output Measures	Performance Measures
Awareness of Hawaiian culture	Perception of Hawai'i reflects cultural authenticity
	High awareness and appreciation for Hawaiian culture

4.5 Market Support

Project Description: Provide cultural representation in major markets during trade shows, missions, promotional events and other activities that showcase Hawai'i's unique people, place and culture. This program is dependent upon travel guidelines and budget availability.

Implementation

- Identify each MMA's needs.
- Procure services of cultural practitioners for in-market support.
- Evaluate effectiveness and benefits of the cultural support in supporting promotion of Hawai'i consistent with our brand identity.

Measurements

Output Measures	Performance Measures
Awareness of Hawaiian culture	Perception of Hawai'i reflects cultural authenticity
	High awareness and appreciation for Hawaiian culture

5 COMMUNITY PILLAR

Pillar Overview

The purpose of the Community pillar is to:

- Support projects and programs that create economic benefits for communities.
- Promote opportunities for resident and visitor interaction.
- Invest in the development and training of community organizations.
- Elevate the communities' awareness and appreciation for the visitor industry.
- Support projects that address current and future visitor industry workforce needs.
- Address safety issues and concerns for residents and visitors.
- Address and mitigate community concerns.

Strategies

In order to enhance Hawai'i's communities, HTA will work to:

- Support projects that are valued by the community and are in alignment with the destination's brand and image.
- Strengthen the relationships between communities and the visitor industry.
- Strengthen communications to educate the resident and visitor of the projects HTA invests in.
- Develop opportunities for economic development in communities.
- Form partnerships to build a strong workforce for the visitor industry.

Leads: Caroline Anderson (Community Programs and Workforce); Marisa Yamane (Communications & Public Relations); and Keith Regan (Safety & Security)

5.1 Community Based Tourism Program

Project Description: The Community-Based Tourism program is designed to empower communities to define and set the direction for tourism development. Through this community-driven effort, HTA will work with communities statewide that have identified tourism as a primary economic development strategy and are willing to work collaboratively. HTA will help facilitate the process, be the catalyst to bring the community and visitor industry together, expand the communities' knowledge of the intricacies of the visitor industry, and ensure that the appropriate stakeholders (e.g. other community members or organizations, local and state government entities, visitor industry sectors) are brought into the dialogue with the communities as they plan their work. In FY 2021, this work will aid recovery efforts and rebuild tourism.

Implementation

- The first step of this program is to develop Destination Management Recovery Action Plans (DMRAP) in partnership with the counties and Island Chapters. The foundation of the DMRAP will be HTA's Strategic Plan and the counties' Tourism Strategic Plans, as well as other plans that have tourism policies/actions. The end results will be four individual DMRAPs with actionable items, timelines and measures of success developed in collaboration with our community, visitor industry

and other sectors. In addition, there will be identified areas to manage for proactive mitigation planning.

- HTA will work with the counties to form a 15-20 member steering committee for each county. Representatives will include, but not be limited to, representation from the Island Chapter, Hawaiian Culture, Natural Resources, Hotels, Activities/Attractions, Transportation, Agriculture, Chamber of Commerce/Business Association, Restaurants, Retailers, Education, and Community members.
- An RFP will be issued for a facilitator, graphic recorder and a writer.
- The timeline to create the DMRAP is aggressive but needed in order to provide the final DMRAP to the State Legislature should legislation be required to assist in the implementation of these action plans.
- Below is the timeline:

Start Date	End Date	Activity	Responsibility
June 9	June 19	Share project with Counties and Island Chapters/ HVCB Present to Mayors	Caroline Keith/Caroline
Week of June 9	June 19	Develop potential Steering Committee per island with input from counties and Island Chapters	Caroline/Kalani
Week of June 9	June 30	Develop Communications Plan for the project	Marisa
Week of June 15	June 26	Prepare RFP to develop action plans for Maui and O'ahu	Caroline/Contracts Team
Week of June 15	June 26	Prepare RFP for a facilitator and recording (virtual live recording)	Caroline/Contracts Team
June 15	July 10	Build out new webpages for Community-Based Tourism Program with content	Caroline/Michele
June 25	June 25	Board approves FY 2021 Budget	Board
July 1	July 15	Publish RFPs for Writer/Facilitator/Recorder	Contracts Team
July 1	July 8	Send email inviting people to participate in the Steering Committee	Caroline
Jul 20	Jul 20	Selection of Plan Writer and Meeting Facilitator/Recorder	Contracts Team

July 24	August 7	Plan out Stakeholder meetings with HTA/County/Island Chapters/Meeting Facilitator/Recorder/Writer	Caroline/Kalani/Marisa
August 10	August 14	1 st set of Steering Committee meetings (Zoom)	Caroline/Facilitator/Recorder
August 24	August 28	2 nd set of Steering Committee meetings (Zoom)	Caroline/Facilitator/Recorder
August 31	Sept 18	Draft 1 of Destination Management Recovery Action Plan (includes input from the Committee)	Caroline/County/Writer
Sept 10	Sept 18	Presentation of Process and Priorities (Zoom) Broader community input obtained via ranking of priorities. 3 rd set of Steering Committee meetings (Zoom)	Caroline/County/Steering Committee/Facilitator
Week of Sep 21	Week of Sep 21	Post Draft Action Plan on website	Michele
Week of Sep 21	Week of Oct 5	Broader community input to Draft 1 of Action Plan	Caroline
Oct 5	Oct 25	Synthesize community comments and incorporate into Draft 2 of Action Plan	Caroline/County/Writer
Oct 26	Nov 2	Draft 2 of Action Plan provided to Steering Committees for final review	Caroline
Week of Nov 2	Nov 13	4 th set of Steering Committee/Stakeholder meetings (Zoom) for approval of the Recovery Action Plan	Caroline/Facilitator/Recorder
Week of Nov 30	Week of Nov 30	Post Destination Management Recovery Action Plan on website	Michele
Week of Nov 30	Week of Nov 30	Issue evaluation survey to Steering Committees and community members who provided comments via web	Caroline
Week of Dec 7		Earliest start to implement the Destination Management Recovery Action Plans	HTA/Counties/other identified leads
June 20, 2021	June 30, 2021	Draft progress-to-date on each Destination Management Recovery Action Plan	Caroline/Counties

Staff Lead: Director of Community Enrichment – Caroline Anderson

Support Staff: Director of PR & Communications – Marisa Yamane; Director of Hawaiian Cultural Affairs and Natural Resources – Kalani L. Ka’anā’anā; Administrative Assistant – Michele Shiowaki

Contractors: TBD – Various

Measurements

Output Measures	Productivity Measure
<p>Participants strongly rate these statements:</p> <ul style="list-style-type: none"> • “I feel like I have a voice in my island's tourism development decisions” • “Tourism presents Native Hawaiian language and culture in an authentic manner” • “Provides opportunities for residents to be involved” • “Tourism is consistent with community values on this island” 	<p>Increased partnerships and synergies between tourism and other sectors, like agriculture, entrepreneurs</p>
<p>Improvement in resident sentiment study:</p> <ul style="list-style-type: none"> • “I feel like I have a voice in my island's tourism development decisions” • “Tourism presents Native Hawaiian language and culture in an authentic manner” • “Provides opportunities for residents to be involved” • “Tourism is consistent with community values on this island” 	<p>Increased opportunities for broader community/residents to be involved in the tourism development process</p>
<p>Number of prioritized projects completed within timeline</p>	<p>Increased communication with visitor industry, other sectors</p>
<p>Number of geographic locations/areas identified for mitigation</p>	

5.2 Community Enrichment Program (CEP)

(This program is currently on hold pending budgetary restrictions due to COVID-19)

Project Description: This initiative fosters community-based tourism projects and resident-visitor interaction in the areas of agritourism, edutourism, culture tourism, culinary, health & wellness, nature tourism, sports, techno tourism, and voluntourism throughout the Hawaiian Islands. Funding to support these projects and events are determined through a RFP process.

Implementation: No FY 2021 funds are designated for this program. Should funds become available, funds may be re-allocated to this program.

Staff Lead: Director of Community Enrichment – Caroline Anderson

Support Staff: Administrative Assistant – Michele Shiowaki

Contractors: TBD – Various

Measurements

Output Measures	Productivity Measure
# of out-of-state visitors participating	Attendee satisfaction of at least 85%
# of residents participating	
# of programs/events funded by island	
Targeted percentages of attendees/participants are at least 25% residents and at least 25% visitors.	

5.3 Workforce Development Program

(This program is currently on hold pending budgetary restrictions due to COVID-19)

Program Overview: To address the industry’s evolving needs in workforce training, HTA works with educational institutions to make training available for the current workforce to help enhance overall skills and quality of service. Sustaining tourism’s success also depends on Hawai’i’s youth helping to carry the industry forward and becoming the next generation of leaders. Encouraging Hawai’i’s high school and college-age students to choose tourism as their career is another important part of HTA’s career development initiative.

A needs assessment will be conducted in Q4 of 2020 (utilizing FY 2020 funds) with the visitor industry to assess the type of training and job skills they are looking for in their current and future employees. Based on the findings, HTA will develop partnerships with organizations and institutions to provide workshops and trainings to further develop and enhance Hawai’i’s current and future (high school level) visitor industry workforce.

Implementation: No FY 2021 funds are allocated to the Workforce Development Program area.

Staff Lead: Director of Community Enrichment – Caroline Anderson

Support Staff: Administrative Assistant – Michele Shiowaki

5.3.1 Current Workforce Development

Program Description: HTA works with training providers to provide information and training to enhance the visitor industry’s knowledge, skills and service level to deliver Hawaiian hospitality. HTA also supports HOST Sector Partnership efforts and engage in an open dialogue with industry stakeholders and educational institutions to address workforce development needs.

5.3.2 Future Workforce Development

Program Description: This program provides Hawai’i youth with learning and networking opportunities, and partners with educational organizations and industry businesses to attract and inspire high school students to pursue a future career in hospitality and tourism. HTA supports ClimbHI’s LEI (Leadership, Exploration, Inspiration) Program targeted at high school students. HTA staff also serves on school/program boards, conducts guest lectures/presentations, connects schools/students with industry partners for projects, and assists with site visits. HTA also provides local students with 2-year and 4-year scholarships to attend the University of Hawai’i at Mānoa College of Business, School of Travel

Industry Management and University of Hawai'i at West O'ahu Business Administration Division. HTA has worked with the Department of Education's Career & Technical Education program to provide customer service curriculum and certificates to high school students.

5.3.3 Community Training Workshops

Project Description: This program will consist of skill-building workshops and technical assistance to assist in elevating Hawai'i's festivals and events, enhancing experiences, and creating new experiences.

5.4 Communications and Public Relations Program

Overall Goals:

- Improve resident sentiment about the impact of tourism on Hawai'i's communities.
- Inform residents, lawmakers, community and visitors about the situation in Hawai'i as a result of COVID-19.

Key Objectives:

- Improve HTA's Resident Sentiment Survey measures on "Tourism is good for me and my family." and "Tourism brings more benefits than problems."
- Communicate updates from Governor David Ige and the county mayors regarding the emergency orders and reopening efforts.
- Engage Hawai'i's residents to assist with the tourism development process.

Staff Lead: Director of Communications & PR – Marisa Yamane

Support Staff: Administrative Assistant – Ariana Kwan

Target Audiences:

- Hawai'i residents
- Hawai'i state legislators and government officials

Core Messages:

- Tourism dollars help support the livelihoods of thousands of families statewide.
- HTA works closely with its partners in the legislature, as well as the tourism industry, to ensure its mission is being fulfilled with the state's best interests in mind.

Key Measures of Success:

- Improved resident sentiment toward tourism, as measured by HTA's Resident Sentiment Survey.
- Increased number of followers/fans by at least 10% and engagement from 0.04% to 0.06% on HTA's Facebook and Instagram pages.
- Increased traffic to HTA's website.

Focus #1: Perpetuation Of Hawaiian Culture

HTA will educate residents about how tourism helps to perpetuate Hawaiian culture through partnerships, social media, public relations and communication support for funding recipients of its Kūkulu Ola programs.

Social Media

- Utilize HTA's Facebook, Instagram and Twitter accounts to share information about the Kūkulu Ola programs being funded by tourism.
- Use #HawaiiTourism and @HawaiiHTA on HTA's posts and encourage organizers and participants of Kūkulu Ola programs to do the same and share HTA's posts.

Public Relations

- Pitch stories about select HTA-sponsored Kūkulu Ola programs to local print, online and broadcast media.

Communications Support

- Encourage funding recipients to share the message of how tourism dollars support their programs and strengthen the perpetuation and understanding of the Hawaiian culture.

Focus #2: Preservation Of Natural Resources

HTA will educate residents about how tourism helps to preserve Hawai'i's natural resources and protect wildlife through partnerships, social media, public relations and communication support for funding recipients of its Aloha 'Āina programs.

Social Media

- Utilize HTA's Facebook, Instagram and Twitter accounts to share information about the purpose and results of the Aloha 'Āina programs being funded by tourism.
- Use #HawaiiTourism and @HawaiiHTA on HTA's posts and encourage organizers and participants of Aloha 'Āina programs to do the same and share HTA's posts.

Public Relations

- Pitch stories about select HTA-sponsored Aloha 'Āina programs to local print, online and broadcast media.
- Collaborate with partners, such as DLNR, to convey the value of tourism to the target audiences through earned media coverage.

Communications Support

- Encourage funding recipients to share the message of how tourism revenue supports their programs and improves the quality and sustainability of Hawai'i's environment.

Focus #3: Community

HTA will educate residents, lawmakers, visitor industry stakeholders and the media about its Destination Management Recovery Action Plan.

Partnerships

- Collaborate with the counties to communicate with residents and get their input regarding what they feel is important as Hawai'i rebuilds tourism.

Outreach

- Utilize HTA's social media, website and email distribution lists to engage the public and share updates regarding HTA's community-based tourism program.

- Communicate updates with local print, online and broadcast media.

Focus #4: Branding/Industry Relations

HTA will educate visitor industry stakeholders, the media and the general public about the breadth and depth of tourism's benefits to communities across the state.

Communications Outreach

- Distribute HTA's research findings, including monthly visitor statistics results, monthly hotel performance reports, quarterly timeshare reports, and annual resident sentiment survey results to visitor industry stakeholders and the media.
- Incorporate the core messages, when appropriate, in press releases, media opportunities and speaking points, along with how the tourism industry helps to fund community-based programs from revenue generated by visitors through the Transient Accommodations Tax (TAT).
- Ensure that HTA's website, HawaiiTourismAuthority.org, continues to serve as the leading resource for research information about Hawai'i's visitor industry.

5.5 Safety & Security Program

Program Overview: HTA is committed to assisting lead agencies and organizations responsible for ensuring that Hawai'i continues to be a safe and secure visitor destination. Under HRS 237D-6.5 (b)(2), HTA, at a minimum, is required to spend 0.5 percent of the Tourism Special Fund on safety and security initiatives.

Strategies: In order to maintain and enhance Hawai'i's brand as a safe and desirable destination, HTA will implement the following strategies:

- Support programs that assist visitors in need and demonstrate our aloha spirit.
- Support preventative-focused projects and programs designed to inform and educate visitors.
- Serve as one of the lead agencies to Hawai'i's visitor industry during times of crisis.

Staff Lead: Chief Administrative Officer – Keith Regan

Support Staff: Operations Manager – Isabella Dance

5.5.1 Visitor Assistance Program

Project Description: HTA's Visitor Assistance Program (VAP) provides support, resources and guidance to visitors who are victims of crime and other adversities while traveling in Hawai'i. Services include providing phone cards, transportation, meals, hospital visits and moral support, replacing lost IDs, assisting with hotel and airline bookings, and more.

Implementation

- Actively support and fund Visitor Assistance Programs throughout the State of Hawai'i that provide crisis services to Hawai'i's visitors.
- Engage VAP providers to continuously improve program delivery, effectiveness and efficiency.
- Promote and encourage greater support for VAPs from the industry and local communities.

Measurements

Output Measures	Performance Measures
# of visitors aided per year (per VASH Office)	Visitors rate Hawai'i as safe and secure
Amount of cash and in-kind support from the industry and local communities	

Contracts and Contractor Leads

- VASH – O'ahu, Jessica Lani Rich
- VASH – Maui, Janet Kuwahara
- VASH – Kaua'i, Daphne Therese
- VASH – Hawai'i Island, Rachelle Hennings

5.5.2 Preventative Programs

(This program is currently on hold pending budgetary restrictions due to COVID-19)

Project Description: Safety and security are an important part of HTA's mandate. Thus, it is critical that we develop and support programs that will have a direct impact on the safety of our visitors. As one of the primary experiences our visitors look forward to while vacationing in Hawai'i is going to the beach and enjoying ocean-related activities, educating and raising awareness of ocean safety is an important component of reducing injuries and preventing incidents from occurring. HTA has collaborated with various agencies to develop ocean safety videos that are displayed throughout the state's airports. These videos are found primarily in the baggage claim areas and other high-traffic arrival locations within our airports.

Implementation

- Develop relevant and engaging ocean safety videos geared towards increasing awareness.
- Ongoing support to lead agencies in safety and security on education and preventative measures.
- Expand and enhance communication channels and tools to inform and educate visitors.
- Continue to collaborate with the Department of Health and State Drowning and Aquatic Injury Prevention Advisory Committee for a statewide water safety campaign.

Contractors

- Pacific Media Group (Hilo, Kahului, Kaua'i, and Kona);
- Clear Channel (Daniel K. Inouye International Airport)

Measurements

Output Measures	Performance Measures
# of safety programs supported/implemented	Visitors rate Hawai'i as safe and secure
# of channels/tools utilized to inform and educate visitors	

5.5.3 Lifeguard & Ocean Safety Program

(This program is currently on hold pending budgetary restrictions due to COVID-19)

Project Description: HTA supports a statewide program to provide resources to county-operated ocean safety programs and to train junior lifeguards to increase self-confidence, physical conditioning and ocean awareness, while also instructing participants in water safety, first aid and surf rescue techniques. Support of ocean safety programs is through the provision of funding to acquire rescue equipment that further enhances each of our four island counties operational needs.

Implementation

- Continue to work with the North Shore Lifeguard Association (NSLA) and all four counties' ocean safety divisions to implement a statewide junior lifeguard training program.
- Further support Hawai'i's ocean safety programs with much-needed rescue equipment (e.g. jet ski, rescue vehicles, etc.).

Contractors

- North Shore Lifeguard Association; County of Kaua'i; Hawai'i County; County of Maui; City and County of Honolulu

Measurements

Output Measures	Performance Measures
# of participants (per county)	Visitors rate Hawai'i as safe and secure
# of jet ski/other rescue equipment purchased	Purchase of ocean safety equipment
% of funds utilized by programs	

5.6 Sports Program

Program Overview: HTA is committed to developing its support for collegiate and professional sporting teams seeking to hold tournaments, exhibitions, and other activities in Hawai'i, which can attract visitors to our islands. As part of this program, HTA requires all sporting events it funds to include a community engagement component as part of their proposal. Community engagement may involve activities, such as youth clinics, coaches clinics and other activities designed to provide Hawai'i's youth with access to resources and guidance not normally available to them. All proposals received will be thoroughly evaluated by HTA's strategic partners – the Hawai'i Lodging and Tourism Association (HLTA) and the Hawai'i Visitors and Convention Bureau (HVCB) – to determine the economic and community benefit prior to receiving HTA's support.

Strategies

In order to enhance and support Hawai'i's youth and coaches, HTA will implement the following strategies:

- Support programs that provide and economic and community benefit to our youth throughout the State of Hawai'i.
- Support programs that are meaningful and are aligned with Hawai'i's brand.

Staff Lead: Chief Executive Officer – Chris Tatum

Support Staff: Market Manager – Chris Sadayasu; Administrative Assistant – Anda Garel

6 BRAND MARKETING PILLAR

Pillar Overview

The goal of this pillar is to strengthen tourism’s contributions by taking the lead in protecting and enhancing Hawai’i’s globally competitive brand in a way that is coordinated, authentic, and market-appropriate; is focused on Hawai’i’s unique culture and natural environment; and supports Hawai’i’s economy by effectively attracting higher-spending, lower-impact travelers.

Objectives

- Incorporate HTA’s pillars (Natural Resources, Hawaiian Culture, Community Enrichment) in all of our Brand Marketing initiatives through our Global Marketing Team.
- Ensure that Hawai’i’s brand image is globally aligned and consistent with the marketing principles of authenticity, uniqueness, and responsible tourism.
- Ensure marketing is focused on higher-spending, lower-impact market segments in each market area.
- Maintain or improve the strength of Hawai’i’s brand relative to its competitors as a safe destination.

6.1 Major Market Management Execution Plan

Program Overview: The major market management program aims to promote the destination through world-class branding. HTA’s ultimate marketing goal is to increase per-person-per-day and total expenditures throughout the state by deploying coordinated branding efforts across the globe in strategic Major Market Areas (MMAs).

Now is the time to focus and refine the core markets, not to develop the markets with potential. The major markets are selected based on their potential to reach visitors who have the highest propensity to truly engage in all that Hawai’i has to offer. HTA has contracted five marketing organizations to promote the Hawaiian Islands in the following MMAs: United States, Canada, Japan, Korea and Oceania (Australia and New Zealand). In 2021, support will not be provided to the China, Taiwan, Europe and Southeast Asia MMAs as these marketing contracts were terminated in 2020 due to the COVID-19 pandemic. The visitor expenditures for these four MMAs are considerably less than the major markets. However, the funding situation remains fluid and there may come a time when HTA will re-evaluate and issue RFPs to re-engage with the China, Taiwan, Europe and Southeast Asia markets.

Strategies: The global marketing contractors were directed to develop Brand Marketing Plans (BMPs) in a new clear and concise format using narrative to explain the strategy as well as worksheets to provide detailed action plans. The ultimate role of the plan is to ensure that the Hawai’i brand story is told across the globe in a way that is consistent, authentic, respectful of the Hawaiian culture and the environment, and continues to inspire travelers to want to visit.

Key Objectives

- Ensure branding of the Hawaiian Islands and each individual brand persona is consistent across the Global Marketing Team.
- Develop integrated plans utilizing current high-value social and digital platforms.

- Ensure travel industry collaboration.
- Drive multi-island visitation with increased focus on the island of Hawai'i due to the 2018 Kīlauea volcano eruption.
- Develop responsible tourism initiatives in concert with HVCB's pre- and post-arrival Kuleana videos.
- Strengthen the marketing of unique visitor activities and experiences with a focus on HTA-sponsored events.
- Utilize syndicated market research to determine short- and long-term travel trends and high-value segments, and to gain insights on consumer travel destination shopping and buying trends.
- Develop research-driven branding programs that target the next generation of travelers.
- Maintain and grow high-value airlift.
- Advocate for pre-clearance approval at the federal level for international markets.
- Market the Hawaiian Islands as a preferred destination for corporate meetings, conventions and incentives (MCI).
- Leverage marketplace relationships to open doors for the global MCI sales team in developing MCI business leads with a focus on citywide business utilizing the HCC.

Staff Leads: Due to changes in the MMAs, HTA will strategically move personnel and re-assign responsibilities among the team.

- Vice President, Marketing and Product Development – Pattie V. Herman
- Director of Marketing – Jadie Goo – China, Hong Kong, Taiwan, Southeast Asia, other
- Tourism Market Managers for respective markets
 - Minami Aoki – Japan, Korea
 - Laci Goshi – USA, Canada, Europe
 - Chris Sadayasu – Oceania, Sports Administration, Cruise Industry
- The above roles are subject to change as the situation continues to be fluid.

Implementation (Procurement Process and Criteria): HTA's vice president of marketing and product development works directly with the Global Marketing Team to direct and approve the annual Brand Management Plan (BMP). Market Managers work directly with the contractors in their assigned markets to monitor and evaluate the delivery of approved key performance indicators (KPIs) against the BMP. Throughout the year, the following activities take place:

- Constant engagement through email and phone communications with all contractors, and in-person meetings for the United States and Japan contractors which have offices in Hawai'i.
- Market contractors' meetings held twice a year in Hawai'i for planning and collaboration purposes to include international contractor stakeholder meetings.
- Marketing Advisory Committee meetings held regularly in Hawai'i for planning and networking purposes with United States and Japan contractors.
- Annual visitation to the major markets by HTA's vice president of marketing and product development.
- Monthly, mid-year and year-end detailed reporting.

Contract and Contractor Leads

MMA	Contractor	Lead Contact	Contract Start Date	Contract End Date	Option Period
United States	HVCB	John Monahan	01/01/2017	12/31/2021	No options remaining
Canada	VoX International	Susan Webb	01/01/2017	12/31/2020	1, one-year option (2021)
Japan	a.Link	Eric Takahata	01/01/2017	12/31/2021	No option remaining
Oceania	The Walshe Group	Giselle Radulovic & Darragh Walshe	01/01/2016	12/31/2020	No options remaining
Korea	Aviareps	Irene Lee	01/01/2020	12/31/2022	2, one-year options (2023-2024)

Summary of Plans and KPIs by Market (full versions of the Brand Management Plans will be in the Appendix B by October 2020)

Visitor Data

Visitor Arrivals by Market			
Rank	Market	2019P	Percent of Total Arrivals (Air and Cruise)
1	U.S. West	4,614,203	44.26%
2	U.S. East	2,265,012	21.73%
3	Japan	1,545,806	14.83%
4	Canada	535,267	5.13%
5	Oceania	362,360	3.48%
6	Korea	225,479	2.16%
7	Europe	138,550	1.33%
8	China	93,703	0.90%
9	Southeast Asia	64,162	0.62%
10	Taiwan	25,885	0.25%

Visitor Spending (\$ Millions) by Market			
Rank	Market	2019P	Percent of Total Spending (Air and Cruise)
1	U.S. West	\$ 6,975.5	39.29%
2	U.S. East	\$ 4,694.4	26.44%

3	Japan	\$ 2,187.2	12.32%
4	Canada	\$ 1,073.5	6.05%
5	Oceania	\$ 883.4	4.98%
6	Korea	\$ 477.8	2.69%
7	Europe	\$ 274.1	1.54%
8	China	\$ 244.32	1.38%
9	Taiwan	\$ 58.0	0.33%
<i>Note: Visitor spending for Southeast Asia is not available.</i>			

Personal Daily Spending by Market		
Rank	Market	2019P
1	China	\$ 324.90
2	Korea	\$ 277.40
3	Oceania	\$ 259.00
4	Taiwan	\$ 249.40
5	Japan	\$ 239.80
6	U.S. East	\$ 210.20
7	U.S. West	\$ 174.90
8	Canada	\$ 165.30
9	Europe	\$ 153.20
<i>Note: Visitor spending for Southeast Asia is not available.</i>		

6.1.1 United States – HTA Market Manager: Laci Goshi

MARKET SITUATION

- The U.S. West and U.S. East are Hawai'i's two largest source markets for visitors. The U.S. West market includes visitors who travel to the Hawaiian Islands from the 12 U.S. states west of the Rockies, and U.S. East includes all other states.
- Domestic air seats accounted for 70% of total seats to Hawai'i in 2019 with 9.7 million seats. In 2020 the total number of domestic seats are expected to decline, while the overall share is likely to increase.
- Of the U.S. visitors that traveled to Hawai'i in 2019, 73.3% are repeat visitors. A decline in first timers and an increase in repeaters for 2020 and into 2021 is anticipated.

- According to the Congressional Budget Office’s economic projections for 2021, growth of real GDP will be 3.3% after a –5.6 annual rate in 2020.
- Unemployment will average 9 percent next year, according to projections from the CBO.
- Many American travelers are pushing their air travel to next year, with 24% saying they expect to take their next commercial airline trip in 2021 at the earliest.
- Many American travelers continue to opt for beach, outdoor and rural type experiences for their next leisure trips, with 30.7% preferring beach destinations or resorts.
- Personal safety considerations will play a role in destination choice.

STRATEGIC MARKETING DIRECTION

- Maintain the strength of the U.S. visitor market for Hawai‘i and the Hawaiian Islands brand, and continue to strengthen the individual island brands.
- Continue to grow air access from the U.S. mainland to the Hawaiian Islands.
- Attract the high-value traveler to grow per person, per day spending.
- Continue to build upon the Hawai‘i Rooted and Kuleana campaigns’ platforms as part of an overarching responsible tourism program in order to attract visitors that are aligned in attitudinal values that respect and support nature, as well as the culture of the places they visit.
- Promote opportunities for voluntourism and responsible tourism.
- Focus marketing on Hawai‘i Target Travelers and Avid Travelers.
- Generate positive earned media coverage, which will be increasingly dedicated toward digital outlets that influence travel decisions of the target audience.
- Continue to focus on authentic content creation, live video and mobile first.
- Showcase Hawai‘i’s unique culture and authentic island experiences.
- Generate awareness of the education and training platform for travel sellers.
- Create opportunities for industry partners to participate in marketing program elements and leverage partnerships throughout the distribution channel.
- Collect and analyze market intelligence, including the monitoring of COVID-19 impacts of source markets, U.S. resident sentiment, travel intentions, future air and hotel bookings, etc.
- For the MCI market, capitalize on Hawai‘i’s strategic mid-Pacific location and positioning of the Meet Hawai‘i brand.
- Provide a centralized resource for meeting planners, whether the meeting is taking place at a single property or at the Hawai‘i Convention Center (citywide), or is a single-island or multi-island bid.

6.1.2 Canada – HTA Market Manager: Laci Goshi

MARKET SITUATION

- Canada is the second largest international market and fourth largest source market overall for visitors to Hawai‘i.
- Of the Canadians that have traveled to Hawai‘i, 64.5% are repeat visitors.
- Analysts project a contraction of 6% in 2020, before economic growth of 2.5% in 2021.
- The federal government has committed more than \$100 billion in economic measures to help individuals and businesses get through the COVID-19 crisis.
- Canada’s population is expected to grow to 38 million by 2021, up +0.8% from an estimated 37.7 million in 2020, and will have a positive influence on outbound leisure travel.

- Canada’s aging population will continue to be a positive contributor to growth in outbound leisure travel driven by baby boomers (those born between 1946 and 1964).
- Millennials continue as a growing and important market sector.
- The Canadian market was one of the first to return to international travel after the SARS epidemic; and millennials, younger families and Gen X couples will travel first following the COVID-19 pandemic.
- In terms of places to visit, Canadians have the most interest in sun destinations that have had the least number of COVID-19 cases.
- Canadian residents are most likely to rely on word of mouth, online search engines, travel review sites, online travel agencies, and destination websites for vacation inspiration; and when it comes to planning and booking, online travel agencies, travel review sites, and online search engines rank among the top and the use of travel agencies will be significantly increased.

STRATEGIC MARKETING DIRECTION

- Continue to create a sustainable Canada visitor market for Hawai‘i.
- Maintain air access from Canada to the Hawaiian Islands, as the COVID-19 pandemic along with the 737 MAX 8 grounding have severely affected the major Canadian carriers.
- Continue to execute a responsible tourism program for the Canadian market to attract visitors that are aligned with our values and efforts.
- Continue to promote opportunities for voluntourism and sustainable tourism.
- Increase visitor expenditures by attracting high-value travelers, experience seekers, and multi-generational segments.
- Execute campaigns that reinforce the unique attributes of the destination.
- Maintain the Canadian landing page on the GoHawaii website and drive traffic to the destination’s social media channels through an engaging digital strategy.
- Build the brand of the Hawaiian Islands and awareness of the diversity of Hawai‘i’s people, places, and culture, especially in the Ontario market.
- Generate positive media coverage across targeted print, broadcast, and online mediums.
- Heighten knowledge and awareness of the Hawaiian Islands with tour operators, retail agents, and meeting/incentive planners.
- Provide the industry with in-market opportunities to partner.
- Market the Hawaiian Islands as a preferred destination for MCI to incentive planners, corporations, and associations.

6.1.3 Japan – Market Manager: Minami Aoki

MARKET SITUATION

- Japan is the largest international market for Hawai‘i, consisting of approximately 15% of all travelers.
- Hawai‘i is positioned as a highly popular destination amongst Japanese travelers, many of whom remain loyal to the destination with repeater travelers holding 68.3% of the share in 2019.
- Japan’s economy has started to show signs of entering a recession in the wake of the COVID-19 outbreak. The unemployment rate steadily rose to 2.6% by April 2020 with some sources projecting

real GDP to contract by 6.5% in 2020. A growth rebound is expected in 2021, but aggregate economic output is likely to remain under pre-COVID-19 baseline levels.

- Average consumption amongst Japanese households began to drop from October 2019 as Japan introduced the consumer tax hike to 10%, resulting in a fall of 5.1% in October, followed by 2.0% in November and 4.8% in December 2019.
- The global COVID-19 pandemic devastated much of Japan’s economic sectors in the first half of 2020. The pandemic placed international trade to a near standstill and urged consumers to refrain from leaving their homes, dragging down the GDP. However, with the government’s massive stimulus package along with other measures such as support for struggling businesses, the Bank of Japan has maintained its view that the economy should begin to gradually recover in the latter half of 2020.
- Recovery of the Japanese travel sector will start with domestic travel, followed by inbound travel. The Japan Tourism Agency has allocated 1,704.4 billion yen for recovery of the tourism sector, mostly to be allocated to the revitalization of domestic travel.
- Consumer studies have shown that of all international destinations, Japanese travelers would most like to visit Hawai’i, followed by Taiwan and Southeast Asia, post-COVID-19.
- The Tokyo Olympics being pushed back to 2021 may prompt heavy focus within the market to attend the events. Although the scale of the games for viewers remains difficult to ascertain under current circumstances, media outlets may focus on the coverage of the Olympics along with the government’s initiatives to boost inbound tourism.
- Resumption of airline services following their suspension during the COVID-19 outbreak will be the key determining factor for the recovery of travelers. As airlines will likely phase in the return of service, an immediate return of travelers will be difficult.
- The COVID-19 outbreak has prompted the rise of new norms as safety and health concerns have become essential throughout all sectors. Effective safety protocol measures to ensure the safety of travelers will become essential in recovery of the tourism sector.

STRATEGIC MARKETING DIRECTION

- Continue to focus on high-value customers by targeting upper-class members of airlines and credit cards, affluent third-generation families, and the romance market.
- Align initiatives with target areas and strategies of each airline through co-op initiatives to enhance load factors.
- Focus promotional initiatives on the Kanto region with high repeater shares.
- Continue targeting cities with strong access to Haneda / Narita through feeder flights as secondary target regions.
- Target “new norm” workers who were minimally affected by the COVID-19 outbreak as they were able to maintain high income levels, desire to travel and have flexibility in their schedules.
- Increase digital marketing to reach target audiences, host online events and enhance online training opportunities for partners to participate in.
- Increase partner collaboration in digital marketing, travel trade and MICE initiatives.
- Continue to attract millennials through collaboration with targeted media, social media, and leverage use of technology, including virtual reality.
- Collaborate with airlines and wholesalers to enhance product development for the island of Hawai’i for promotional initiatives.

- Continue dissemination of Hawaiian culture and education of Pono travelers through the Aloha Program (Hawai'i Specialist Program) initiatives.
- Continue promotion of responsible tourism through PR and media relations initiatives.
- Intertwine surfing-related promotions with the Aloha Program and responsible tourism initiatives as it will be an official sport at the Olympics.
- Maximize Japanese residents' participation and enrichments through the Honolulu Festival and Pan-Pacific Festival.
- For MICE initiatives, focus will be placed on incentive, edu-tourism and entertainment segments as the market has been devastated by COVID-19. Focus will be on groups with smaller short-term leads, aimed for 2021 – 2023.

6.1.4 Oceania – Market Manager: Chris Sadayasu

MARKET SITUATION

- In 2019, the number of visitors from Oceania decreased 12.8% to approximately 362,360 year-over-year, with total visitor spending of \$883 million and an average daily spend of \$259. Factors that contributed to the decrease include reduced airlift, and the value of the Australian and New Zealand dollar trending downwards against the U.S. dollar during the year.
- In 2019, air capacity from Oceania decreased from 2018. A re-alignment of air schedules (particularly from Auckland) resulted in a decline in overall seats (-7.2%) from Oceania to 494,582.
- The Australia and New Zealand currencies are expected to recover from the COVID-19 crisis during the second half of 2020 to hold steady against the U.S. dollar.
- While the market has been significantly impacted by COVID-19, both countries are underpinned by a stable economic and political environment, and consumers with the desire and propensity to travel.

STRATEGIC MARKETING DIRECTION

- Lead direct consumer activity by communicating authentically the four brand pillars that underpin Hawai'i's value proposition and the brand message for the Oceania market: Six Hawaiian Islands. Infinite Experiences.
- Implement a recovery plan designed to ensure Hawai'i is in the best competitive position when traveler confidence returns and accessibility is re-instated.
- Generate and run multi-channel initiatives targeting the high-value Oceania traveler
- Employ an "always on" consumer and trade engagement strategy.
- Tailor destination messages and showcase the experiential aspects of the six Hawaiian Islands to stimulate and drive consumer demand.
- Keep Hawai'i top-of-mind with trade partners through signature educational events such as Month of Lei and Aloha Down Under.
- Further leverage Hawai'i Tourism Oceania's social media channels and continuously promote the GoHawaii.com website.
- Continue and expand relationships with Hawaiian Airlines, Air New Zealand, Qantas Airways, and Jetstar Airways.

- Work with the internal communications team to ensure local media coverage in Hawai'i of community-based programs organized by HTO and its partners.
- Promote the ethos of responsible tourism and a respectful visitor through brand marketing and communications.
- Target audiences:
 - By demography: Couples, Family and Multi-generational family groups
 - By travel values and motivations: High-value travelers seeking authentic, tangible engagement, learning and discovery
- Principle geographic targets include:
 - Australia:
 - New South Wales (Sydney)
 - Victoria (Melbourne)
 - Queensland (Brisbane and Gold Coast)
 - New Zealand
 - Auckland, Waikato, Bay of Plenty
 - Central (including Wellington)
 - Canterbury (including Christchurch)

6.1.5 Korea – Market Manager: Minami Aoki

MARKET SITUATION

- Korea accounts for 2.2% of total visitor arrivals in 2019 for the Hawaiian Islands.
- The OECD projected that Asian economies will weather the economic effects of COVID-19 more effectively than the rest of the world. While the global GDP is projected to drop 7.5% in 2020, the only G20 Economy projected to weather the COVID-19 epidemic with less impact to its economy is South Korea, which is expected to see a 2.5% decline in 2020 GDP. The Korean economy would grow by 3.9% in 2021, showing a good recovery, according to Korea Development Institute.
- The number of Korean outbound travelers from January to April 2020 was 3,734,600, a year-over-year decrease of 63.1% due to the COVID-19 outbreak, according to Korea Tourism Organization (KTO). The number of Korean outbound travelers in 2019 was a total of 28,714,251, a slight year-over-year increase of 0.06%.
- Overseas carriers plan to resume flights from/to Seoul (United Airlines, Turkish Airlines, Air Macau, Air Canada, Singapore Airlines, and Malaysia Airlines) from June or July 2020 as the travel demand is expected to recover in Q3 and Q4.
- Major travel agencies are resuming the overseas travel sales as flight operations reopened and travel bans of few countries were shifted. Interpark Tour and Online Tour launched early bird promotions mostly for European destinations with flexible cancellation policies to target the travel period after August 2020.
- The Korean female proportion of overseas travelers has gradually increased since 2012 and “Active Seniors,” ages 50 to 60, are the largest segment of outbound travelers. According to KTO, the most popular international destination for Korean travelers in 2019 was Japan, followed by Vietnam and the United States.
- As South Korea heads to becoming a "super-aged" society, more and more businesses are looking to cater to the needs of older citizens. “Aging Society” is a qualification earned when more than 7%

of the population is over 65. If that number exceeds 20%, the nation earns the title of “Super-Aged Society.”

STRATEGIC MARKETING DIRECTION

- Stimulate the high-value market and pent-up outbound travel demand in the post-pandemic era to increase visitor arrivals and expenditure
- Enhance digital branding initiatives to increase the use of social media platforms (Hawai’i Tourism Korea’s Facebook, Instagram and YouTube pages) as strategic communications tools to collaborate with Korean digital influencers. The focus is to raise the online profile and visibility of Hawai’i with a “six islands” message.
- Revitalize market demands in collaboration with industry partners in Hawai’i and Korea to ensure a powerful impact at the appropriate time with refined strategies.
- Accelerate the pace of Hawai’i bookings and stimulate calls-to-action in partnership with online booking platforms run by retail groups and trade partners.
- Develop strategic marketing co-ops with key airlines (Korean Air, Asiana Airlines and Hawaiian Airlines) to stimulate further growth in airlift for the competitive post-pandemic era.
- Generate sophisticated travel stories covering sustainable tourism, culture, history, cuisine, edu-tourism and surfing for diverse target audiences.
- Emphasize cultural authenticity by integrating authentic cultural practices into Korea travel marketing promotions to perpetuate Hawai’i’s unique heritage through “Share Aloha,” “Kuleana” and “Rooted” videos created by HVCB as centralized responsible tourism resources.
- Heighten knowledge and awareness of the Hawaiian Islands with tour operators, retail agents, and meeting/incentive planners through a series of online and offline seminars and trade/MCI Fams.
- Focus on responsible tourism promotion by developing a pre-arrival informational campaign, including detailed information on the safety protocols being implemented at Daniel K. Inouye International Airport, to educate potential visitors about how to travel throughout the Hawaiian Islands in a sensitive manner. This includes medical screening of incoming and departing passengers, as well as airline crews by the Hawaii National Guard as an added layer of protection against COVID-19.
- Cultivate MCI business for the Hawaiian Islands by implementing educational workshops or Fams targeting core business segments, such as banking/finance, multi-level marketing, medical, insurance, sports, and entertainment

Measurements

Output Measures	Performance Measures
Leisure: Consumer/Trade Ad Reach & Impressions; # of Consumer/Trade Shows and Participants; PR Values & Impressions; # of Media/Trade FAMs and Participants; # of Articles Generated from Press Trips; # of Trade Education Sessions & Participants; # of Industry Partner Meetings	Prospective visitors surveyed in the Marketing Effectiveness Survey (MES) who were aware of Hawai’i marketing materials but had never been to Hawai’i scoring statistically higher in perceptions of uniqueness of the destination than those who were unaware. Improved Hawai’i’s ratings in the MES for “value” and “unique experiences.” Annual results of a new Visitor Satisfaction survey question asking if visitors recall hearing or seeing information about safe and responsible travel.

<p>Social Media: Impressions & Interactions Gained; Fan Growth; # of Posts</p>	<p>Assurance, through annual contractor performance review and HTA oversight checklists, that marketing materials in each major market area have consistent branding, are aligned with core values, and are appropriately adapted for nuances in each market</p>
<p>MCI: # MCI Trade Shows & Appointments; # of MCI FAMs & Participants; # of MCI Education Sessions & Participants; # of MCI Sales Calls</p>	<p>Total citywide MCI tentative room nights; Total citywide MCI definite room nights; Total citywide MCI new to Hawai'i - definite room nights; Total single-property MCI tentative room nights; Total single-property MCI definite room nights; Total single-property MCI new to Hawai'i - definite room nights</p>

6.2 Marketing Opportunity Fund

(This line item is presently on hold and has been zeroed out due to COVID-19)

Program Overview: HTA will utilize these funds in markets where there are opportunities to impact short-term needs due to the COVID-19 pandemic and other unforeseen changes in market conditions, or to take advantage of new opportunities that create high-value branding.

Implementation

- For cumulative initiative expenditures greater than \$250,000, the HTA Marketing Committee and HTA CEO will need to approve funding for the initiative. For cumulative expenditures less than \$250,000, only the HTA CEO will need to approve the funding.

Staff Lead: VP Marketing and Product Development – Pattie V. Herman

Contractor: Will be determined with each project.

Measurements

- All initiatives will have trackable measures to determine impact and ROI.

6.3 Island-based International Marketing + Island Chapters Staffing & Administration

Program Overview and Implementation: Currently, there are no funds budgeted for Island-Based International Marketing, and a reduced budget amount has been proposed for the Island Chapters' Staffing and Administration. If funds are made available for Island-Based International Marketing, they will be used in a coordinated effort between HTA's Global Marketing Team (GMT) and the Island Chapters to support media, travel trade, and MCI marketing efforts on each island.

Contractors

- HTA's Global Marketing Team and Island Chapters (managed by the Hawai'i Visitors and Convention Bureau)

Measurements (for Island-Based International Marketing, if applicable)

Output Measures	Performance Measures	Productivity Measures
# of partners participating	International media publishes positive articles about Hawai'i in a way that promotes cultural authenticity	Cost of media FAM per article generated
# of FAM tours	International travel trade production to Hawai'i remains relevant	Awareness of Hawai'i and conviction to consider traveling to Hawai'i
# of participants	International travel trade promotes Hawai'i in a way that reflects cultural authenticity	Likelihood to visit Hawai'i increases
# of leads	MCI efforts bring in new international meetings	MCI room nights

6.4 Global Meetings, Conventions and Incentives (MICE) Strategy

Program Overview: While Hawai'i's leisure market has typically been strong, when managed strategically, the MCI or MICE market can become a critical source of profitable "base" business booked years in advance. This base of business enables a higher yield of shorter-term leisure business. It can also help fill hotel occupancy gaps in future years by capitalizing on off peak opportunities. Additionally, to be competitive and thrive in the changing world of Business Tourism (MCI market), Hawai'i must capitalize on its strategic mid-Pacific location, which conveniently connects East and West, helping organizations create events which are international, engaging and memorable business event experiences.

Implementation: Legislation passed during the 2019 session now enables HTA to separate the Hawai'i Convention Center's sales and operations efforts from a sole provider. With support from the industry and key customers, HTA is restructuring its approach to MCI by offering meeting planners a single point of contact for all of their MCI needs. Whether the meeting is taking place at a single property or at the Hawai'i Convention Center (citywide), a single-island or multi-island bid, or from single or multiple gateways, this centralized resource will provide a one-stop shop for planners. By developing a truly global MICE organization, Hawai'i can harness the rapid expansion of global tourism through effective collaboration between the Global Marketing Team led by a centralized MCI strategy and process.

As a part of this effort, HTA issued a RFI for a Global MCI contractor and through this process, executed a contract with the Hawai'i Visitors and Convention Bureau effective January 1, 2020.

Global Objectives

- **Leadership:** HTA and HVCB have identified a strong leader who serves as Hawai'i's "face of MCI" for the globe with a proven background in successful leadership of a global MCI organization.
- **Deployment:** Deploy the right sales resources (people) against the right accounts and segments in each major MICE gateway globally.
- **Target Audience:** Identify appropriate industry segments that have the greatest propensity to consider Hawai'i. Identify specific targets for citywide business at the Hawai'i Convention Center.
- **Collaboration:** Collaborate with key "market specific" hotel and DMC stakeholders, 'Elele Ambassadors and other HTA GMT MICE staff in developing global MICE business.

- **New Leads:** Develop strategies to find new business with a focus on shoulder seasons of April, May, October and November.
- **Conversion:** Focus on plans to convert tentative to definite.
- **Marketing:** Develop marketing strategies that capture and amplify the positioning of the Meet Hawai'i brand through all available media and public relations means.
- **Sales Tools:** Develop world-class sales tools to include destination training, presentation assets, testimonials, bid books and partner coordinated/destination led site inspections.
- **Optimize Hawai'i's Strategic Location:** Find new and creative approaches to take full advantage of Hawai'i's unique East/West location and Meet Hawai'i positioning.
- **Market Specific Nuances:** Identify and develop strategies to capture demand from top performing, market specific MICE segments (meetings, conventions, incentives); vertical markets (automotive, technology, sciences, financial, MLM, etc.) and A-list intermediaries (wholesalers, corporations, incentive houses, associations, etc.) in each Major Market Area.
- **Technology:** Leverage digital tools to manage lead distribution, sales activity, CRM and event management.
- **Education and Trade Shows:** Develop sales missions, training seminars and FAM trips to increase destination knowledge. Attend proven trade shows to develop new business and training opportunities.
- **Accountability:** Each sales person to be accountable to their annual group goals.
- Many of the above initiatives have been placed on hold due to COVID-19 and budget cut backs. In the interim we will work with our GMT to maximize MCI business in Hawai'i.

Staff Lead: VP Marketing and Product Development – Pattie V. Herman

Contractor: Hawai'i Visitors and Convention Bureau

Historic production – Hawai'i Convention Center

A historical look at booking performance for the Hawai'i Convention Center is as follows:

Year	Future Room Nights Booked	New Tentatives
2019	88,537	237,017
2018	225,351	359,609
2017	166,565	692,213
2016	177,931	232,890
2015	199,639	416,764

Note: In 2016, 2017 and 2018 definite room nights include 10,155, 30,465 and 47,395 respectively for the Honolulu Marathon, which will not be considered a “citywide” group moving forward.

Historic Production – Single-Property Definite Room Nights Leads

MMA	2015	2016	2017	2018	2019
USA	227,141	195,629	158,482	217,132	197,659
Canada	4,942	1,432	1,580	3,973	1,344
China	14,454	300	10,757	10,733	9,502
Europe	-	12,944	410	613	-
Japan	47,505	46,724	46,732	52,645	48,628
Korea	21,137	14,304	22,728	19,948	9,898
Oceania	11,107	11,745	10,607	10,705	7,325
Other International	611	-	5,701	-	-
Grand Total	326,897	283,078	256,997	315,749	273,996

Note: Global Marketing Team numbers represent assistance with new and existing leads.

6.5 Cruise Infrastructure Improvements and Arrival Experience

Program Overview: Cruise business has the potential to bring visitors to the Hawaiian Islands during off-peak seasons and are a good source of first-time visitors. For the local community, there is the additional positive economic impact of most ship supplies being sourced locally.

Implementation: HTA will ensure that Hawai'i continues to foster positive relationships with key cruise lines to maintain this business and steer new interest to strategic ports during off-peak seasons.

In addition, HTA works closely with DLNR, Department of Transportation – Harbors Division and the cruise lines to ensure that passengers are greeted with a seamless arrival experience. Working in concert with a seasoned cruise specialist contractor, HTA staff will effectively manage this sector and collaborate with HTA's Director of Hawaiian Cultural Affairs and Natural Resources to also elevate the quality of the arrival experience.

Staff Lead: Tourism Market Manager – Chris Sadayasu

Contractor: Access Cruise, Inc.

6.6 Global Marketing Shared Resources and Integrated Digital Strategy

Program Overview: HTA will work toward a more globally aligned brand identity by fostering increased collaboration in the development of creative content for all platforms in all major market areas.

The way people consume digital content continues to shift. Driven by mobile, real-time video and distributed content models that keep users in their social networks, the internet continues to rapidly change. Strategies focused on page views, unique visitors and homepage entry are less relevant today and will play an even smaller role two to three years from now.

The traveling public is increasingly becoming inspired and making decisions about their travel preferences based on information found in their social networks, engaging with live video casts and browsing related content throughout the day. They have access to infinite amounts of information and choices anytime, anywhere in any way, and this can be both helpful and overwhelming. The explosion of available resources – from travel bloggers to digital publications – can make the travel planning process easier, but also be overwhelming to consumers as they make decisions on their next travel destination due to the amount of content available.

Further, consumers have come to expect contextual communications and experiences, which means brands are being held accountable for personalization. As technology evolves, consumer expectations of relevancy and personalization from the content they are being served will only rise. Brands will need to become more adept at meeting demands along the consumer journey, regardless of time, place or device.

For Hawai'i to remain competitive and stay top-of-mind, a digital marketing strategy must:

- Cut through the clutter and deliver content and experiences that will speak to an increasingly sophisticated, mobile audience with a limited attention span.
- Deliver more personalized, contextual forms of content and improve the infrastructure and capacity for communities to participate in an authentic manner.
- Partner with third parties (e.g. digital influencers) who have built-in, engaged audiences of scale that seek their expertise to tell the Hawai'i brand story.
- Include mobile platforms that improve the visitor experience pre- and post-arrival that also engage local stakeholders.
- Catalyze and empower stakeholder support by empowering organizations to share their stories.

It is critical that a digital marketing strategy focuses on authentic content creation, live video and mobile first, especially as we look towards emerging markets (attracting new visitors) and the next-generation traveler. It is important that we create global platforms and success measures that can be customized, while at the same time benefit multiple markets.

Implementation: HTA will work through the Global Marketing Shared Resources team to develop a comprehensive, integrated digital strategy that will consider all digital channels and their unique relevance in each MMA. The strategy will be informed by research and ensure collaboration with each MMA to maximize results through all global digital platforms.

6.6.1 Intellectual Property Data Bank (Knowledge Bank)

Project Description: As Hawai'i's domestic marketing contractor, the Hawai'i Visitors and Convention Bureau (HVCB) has the most seasoned creative team, technology and process to develop, license, store and coordinate use of such content and assets. Accordingly, they serve as a "brand central" resource for this purpose. Funds will be also used to continue improvements and maintenance of the Knowledge

Bank (the State’s global still image and video library) by retaining software licensing and support agreements for editing, processing, maintenance and hosting. Required licensing (talent and stock photography) will be obtained and creative development of still photography and video will be curated, globally coordinated and distributed via the Knowledge Bank. In addition, updates of the "all-islands" and “individual” maps will be done for the international contractors that currently do not have their own collateral. Stationery and logos are also to be created for use by the GMT as needed. HTA will manage all global creative development through this central resource, while allowing for appropriate market specific adjustments.

Staff Lead: VP Marketing and Product Development – Pattie V. Herman

Contractor: Hawai’i Visitors and Convention Bureau

Measurements

Output Measures	Performance Measures
# of staff assigned to tourism research and management of the Knowledge Bank	Quality of reports and analysis
# of new still and video images in Knowledge Bank	Quality and alignment of global creative content

6.6.2 GoHawaii.com

Project Description: During the past fiscal year, HTA worked with contractor Miles Marketing on GoHawaii.com, a dynamic destination website. It is designed to be the travel industry’s most advanced story-telling platform, capable of delivering immersive, sensory-rich multimedia content experiences that transcend words and encapsulate the vibrancy of Hawai’i across all types of digital devices. In 2020, HVCB and Hawai’i Tourism Japan collaborated on a digital research project to define the role of a website in making leisure vacation destination decisions. Moving forward, HTA determined that the best outcome would be for HVCB to manage the GoHawaii.com website.

Implementation: The website will be included in the development of an integrated digital strategy with the Global Marketing Shared Resources team. Special focus will be given to:

- Constantly evaluate the role of the DMO website in the consumer travel journey, from initial dreaming to sharing, and ensure our user experience and information architecture is getting prospective travelers the content they need to choose Hawai’i as a destination and plan their trip.
- Identify the role of GoHawaii.com in HTA’s and the GMT’s owned channel ecosystem, and ensure all channels are seemly working together, with management by HVCB

Staff Lead: VP Marketing and Product Development – Pattie V. Herman

Contractor: Hawai’i Visitors and Convention Bureau

Measurements

Output Measures	Performance Measures	Productivity Measures
# of unique users	Pages per session	Likelihood to visit Hawai’i
# of sessions	Average session duration	Awareness of Hawai’i and conviction to consider traveling to Hawai’i
	Bounce Rate	

6.6.3 Global Social Media Strategy

Project Description: HTA will continue to refine its global social media strategy by developing and executing unique social programs across each MMA that align with the HTA’s existing social framework and brand guidelines. The overarching goal is to increase consumer engagement through smart targeting and paid media. This will include coordinating with the GMT contractors to ensure effective engagement with their respective communities and providing ongoing oversight, guidance and technical support.

Implementation

- Work with HVCB to develop relevant digital assets needed for new projects/opportunities with a focus on creating feed-stopping content that will inspire our audiences to book a Hawai’i vacation.
- Ensure all programming is being developed with the responsible traveler in mind, one who will respect Hawai’i’s people and land, and deliver pre- and post-arrival messaging in alignment with the Kuleana campaign.
- Continue to work with HVCB’s digital team to maintain and upgrade the various websites.

Staff Lead: VP Marketing and Product Development – Pattie V. Herman

Contractor: Hawai’i Visitors and Convention Bureau

Measurements

The following analytics are measured and reported on a monthly basis:

Output Measures	Performance Measures	Productivity Measures
# of followers/fans	Impressions	Likelihood to visit Hawai’i
# of posts per channel	Interactions	Awareness of Hawai’i and conviction to consider traveling to Hawai’i

7 SUPPORT: TOURISM RESEARCH AND PLANNING

Overview: Sound business decisions based on visitor data and research is important for effective destination management and development. Hawai'i's visitor industry is in a very mature phase, which requires constant research and data to maintain and increase brand awareness, improve and enhance products, and remain competitive with other destinations. Government-based services ensure industry-wide access to this data. HTA's Tourism Research Division (TRD) will sustain efforts to make research available to educate and empower stakeholders and facilitate data driven decision-making.

Programs

- Visitor Arrival and Departure Surveys (calculation of visitor characteristics and expenditures)
- Estimation of Visitor Arrivals by Country by Month
- Data Dissemination
- Accommodations and Air Seats (infrastructure research)
- Evaluation and Performance Studies
- Marketing Research
- Tourism Strategic Plan Update

Objectives

- Increase availability of tourism research resources through technology.
- Increase knowledge about potential visitors to Hawai'i by expanding research.
- Increase use of tourism data and research for planning and marketing.
- Establish a program monitoring and evaluation system that ties into the contract management system.

Strategic Plan Directives

- Strengthen HTA's community relations by monitoring and strategically responding to communities' needs and core issues related to tourism.
- Conduct ongoing research to identify consumer needs and awareness of Hawai'i's attributes in order to adjust brand marketing initiatives.
- Expand research and resources that will help analyze and determine long-term travel trends, identify high-spending segments, and provide insight on the next generation of travelers.
- Explore new international markets to counter seasonality and exchange rate issues.
- Institute an ongoing program monitoring and evaluation system for all programs to include measures of effectiveness of the Brand Management Plan and progress of achieving strategic plan goals.

7.1 Visitor Arrivals, Characteristic and Expenditures Execution Plan

Program Overview: This section incorporates the Calculation of Visitor Characteristics and Expenditures program and the Estimation of Visitor Arrivals by Country by Month program. HTA conducts data collection surveys of visitors' characteristics to Hawai'i and visitors' spending in Hawai'i. This data is critical to the state's economic analysis.

The program supports four data collection surveys:

- Domestic Inflight survey
- International Departure survey
- Island Departure survey
- Cruise Visitor survey

Collectively, these surveys are referred to as HTA’s Basic Data Series (“BDS”). The BDS objective is to collect, process and report statistics from a representative sample of visitors across all markets and the six major islands (O’ahu, Hawai’i Island, Maui, Moloka’i, Lāna’i, and Kaua’i). The number of visitors who traveled by out-of-state cruise ships to Hawai’i is added to the counts of visitors who came by air to calculate total visitor data for the state. These visitor statistics are published monthly in the HTA’s visitor news releases and annually in the HTA’s Visitor Research Reports.

Objective

- Produce monthly highlights and reports in a timely manner.

Staff Leads

- Tourism Research Director – Jennifer Chun
- Tourism Research Manager – Minh-Chau Chun

Implementation

- See programs described below.
- HTA staff will work towards implementing the following:
 - Revise syntax and methodology to produce more relevant tables and banners.
 - Increase the sources of data on international travel to cross check estimation of visitor arrivals by country.
 - Implement programming to increase efficiencies in data processing and reporting.

Contractor: See programs described below

Measurements

Output Measures	Performance Measures	Productivity Measures
Monthly and annual research studies completed	% studies performed on time and on budget	Completion of 12 monthly reports and an annual report
# of hits/clicks on the research and reports section of the HTA website	Decreased number of requests made for additional information, including requests for data that are currently not available	Increase data points and information published online

7.1.1 Domestic and International Visitors by Air

Inflight Forms Printing, Storage and Delivery: HTA is responsible for producing the Department of Agriculture’s (DOA) Plants and Animal Declaration form (inflight form) in exchange for allowing the state visitor survey form to be printed on the opposite side. The forms are scannable. HTA outsources the

printing, storage and delivery of the inflight forms to a print vendor. The vendor delivers the forms three times a month to the DOA Plant Quarantine Office in Honolulu. The lead monitors inventory of the forms and may recommend earlier delivery if the DOA is low. The lead also coordinates shipment of forms to the neighbor islands. The current contractor is printing approximately 14 million forms per year, or an average of 1,145,760 forms per month.

Contractor: HonBlue, dba Electric Pencil

Domestic Inflight Visitors Basic Characteristics Survey: Inflight forms are distributed to and collected from passengers by airline crews arriving in Hawai'i on domestic flights. The contractor uses high-speed image scanners capable of reading inflight forms in English, Japanese, Chinese, Korean, Tagalog, and Spanish. In 2019, there were 4,136,214 usable forms collected and processed. Data collected from this survey include: domestic visitor counts, party size, length of stay, visitor status, purpose of trip and island visitations broken down by major market areas and by U.S. states and U.S. cities.

Contractor: SMS Research and Marketing Services, Inc.

International Departure Visitors' Basic Characteristics and Expenditure Survey

This project involves two surveys:

- The **International Survey** is the main source for visitor and expenditure data on International visitor markets. Survey forms are distributed to a systematic sampling of passengers departing on international flights at the Daniel K. Inouye International Airport, Kahului Airport, Līhu'e Airport and Ellison Onizuka Kona International Airport at Keāhole. In 2019, a total of 61,742 surveys were completed and processed.
- The **Island Survey** provides island-specific information. Surveys are conducted at departure areas of the airports on all the islands. Respondents include domestic, international and Hawai'i resident travelers. Sample selection is made from all airlines with scheduled flights departing that island including international, domestic and inter-island flights; and also major charter flights. In 2019, 31,121 completed survey forms were received from Daniel K. Inouye International Airport on O'ahu; 17,064 completed forms received from Kahului Airport on Maui; 820 forms from Moloka'i Airport; 875 forms from Lāna'i Airport; 11,977 forms from Līhu'e Airport on Kaua'i; 4,371 forms from Hilo Airport; and 10,578 forms from the Ellison Onizuka Kona International Airport at Keāhole in Kona. Data collected includes: characteristics and spending for their entire trip in the state of Hawai'i from visitors departing on international flights; travel characteristics of Hawai'i residents departing on international flights; and characteristics and spending by visitors on each of the islands.

Contractor: OmniTrak Group, Inc.

7.1.2 Cruise Visitors

Project Description: The purpose of this project is to survey passengers aboard all Hawai'i home-based and out-of-state cruise ships touring the Hawaiian Islands.

Implementation

- The contractor prints and delivers survey materials to ship pursers for distribution to cruise passengers. They also collect back completed forms for processing and reporting.

- Data collected from the cruise survey includes island visitation, length of stay, type of accommodation, purpose of trip, demographic information and expenditures.
- Contracts to conduct the cruise survey are procured through a competitive bid process and awarded as four-year agreements.
- In 2019, 15,405 completed forms were processed.

Contractor: OmniTrak Group, Inc.

7.2 Estimation of Visitor Arrivals by Country by Month

Program Overview: Produce estimates of arrivals by countries, by month, which are used to weigh the visitor characteristics and expenditure data also collected during that same time period. Estimates of visitors by country are calculated using I-94 data from the U.S. Department of Commerce, National Travel and Tourism Office (NTTO). Estimates are compared with growth trends from the State of Hawai'i's Department of Transportation airline carrier reports, passenger share data from DIIO Aviation Industry, and monthly seats schedules as a cross check.

Implementation

- Subscription to I-94 monthly summary of International Travelers to the U.S.A.
- Annual subscription to Zip Code Database

Contractors

- Department of Commerce, National Travel and Tourism Office
- Zip-Codes.com

7.3 Data Dissemination Execution Plan

Program Overview: Provide visitor data to industry and government stakeholders in a user-friendly format.

Objectives

- Increase awareness of available tourism research resources.
- Increase use of the Tourism Research pages of the HTA website.
- Increase knowledge and skills about visitors to Hawai'i.
- Increase use of tourism data and research for planning and marketing.
- Develop procedures to better meet the request-for-data inquiries, research materials, and technical service, including publication of accessible materials which aims to conform with Web Content Accessibility Guidelines.
- Develop additional reporting and stakeholder outreach materials.

Staff Leads

- Tourism Research Director – Jennifer Chun

- Tourism Research Manager – Minh-Chau Chun

Implementation

- See programs described below

Contractor: See programs described below

Measurements

Output Measures	Performance Measures	Productivity Measures
Monthly visitor statistics press releases	% of visitor statistics press releases distributed on time	12 monthly press releases
Monthly state, county, and market fact sheets	% of fact sheets distributed on time	13 fact sheets updated monthly
Visitor Satisfaction & Activity Report (VSAT)	% of VSAT reports distributed on time	4 quarterly reports, 4 quarterly infographics, and 1 annual report
Annual visitor research reports	% of annual visitor research reports distributed on time	
# of hits/clicks on the research & reports section of the HTA website	Decreased number of requests made for additional information, including requests for data that are currently not available	Increased data points and information published online

7.3.1 Data Dissemination

Project Description: Publication of monthly highlights and annual reports.

Implementation

- Publication of monthly visitor statistic highlight press releases, including visitor spending, visitor days, visitor arrivals and characteristics.
- Publication of monthly visitor statistic files, including by market, by island, by U.S. region, and by U.S. Core-Based Statistical Area ("CBSA"), as defined by the U.S. Office of Management and Budget.

Contractor: Annual Report Printing (2019 TBD)

7.3.2 Data Requests

Project Description: Fielding and fulfilling requests for visitor data and analyses from industry stakeholders.

Implementation

- Work with HTA's Director of Communications and Public Relations to respond to media requests for information.
- Work with HTA's Executive Secretary to respond to Legislative Requests and requests from HTA board members.
- Work with HTA Procurement staff on Uniform Information Practices Act (UIPA) requests.

- Respond to direct requests, including emails to HTAResearch@gohta.net and info@gohta.net and phone requests.

7.3.3 Online Data Warehouse

Project Description: Maintenance of online data warehouse to disseminate visitor data.

Implementation

- The most common research tables (monthly highlights, dashboards, etc.) will be automatically generated through the Online Data Warehouse, which shortens production time, minimizes resources and saves staff time.
- Allows public to create customized tables of existing visitor data, which would decrease staff time responding to public requests.
- HTA staff will prepare data files to be uploaded to Online Data Warehouse.
- An online data warehouse will be developed to provide TRD with a backend database system.

Contractor: DBEDT/UHERO

7.4 Accommodations and Air Seats (Infrastructure Research) Execution Plan

Program Overview: Infrastructure Research includes information on industries that support the visitor experience, which include air seat capacity, accommodations, cruise ships, parks and natural resources.

Objectives

- Expand knowledge and resources on airline industry.
- Monitor hotel performance statistics, including occupancy and revenue.
- Monitor vacation rental performance statistics, including occupancy and revenues.
- Increased use of tourism data and research for planning and marketing.

Staff Lead: Tourism Research Director – Jennifer Chun

Staff Lead: Tourism Research Manager – Joseph Patoskie

Implementation

- See programs described below.

Measurements

Output Measures	Performance Measures	Productivity Measures
Visitor Plant Inventory Report	VPI report distributed on time	1 annual report
Air Seat Outlook Reports	% of air seat outlook reports distributed on time	12 monthly reports, 4 quarterly narrative reports, minimum of 1 annual forecast report (to be updated as needed)

Monthly Hotel Performance Reports	% of hotel reports distributed on time	12 monthly hotel reports
Quarterly Timeshare Reports	% of timeshare reports distributed on time	4 quarterly reports
Monthly Vacation Rental Performance Reports	% of vacation rental reports distributed on time	12 monthly vacation rental reports
# of hits/clicks on the research and reports section of the HTA website	Decreased number of requests made for additional information including requests for data that are currently not available	Increased data points and information published online

Contract and Contractor Lead

- See programs described below

7.4.1 Visitor Plant Inventory Survey (VPI)

Project Description: The goal of the VPI is to compile an accurate annual assessment of existing and planned visitor accommodations for the State of Hawai'i by island, location, property type (hotel, condo-hotel, bed and breakfast, individual vacation units, rental house, hostels, timeshare, and apartment-hotel), and class of units (standard, budget, deluxe, luxury).

Implementation

- An inventory of Hawai'i lodging properties will be conducted.
- A supplemental study of Individually Advertised Units will be conducted.
- Staff will prepare reports for the Hawai'i State Department of Business Economic Development and Tourism (DBEDT) and State Geographical Information System (GIS) updates.

Contractor: Kloninger and Sims Consulting, LLC

7.4.2 Air Seat Outlook

Project Description: Air seat data is used to monitor the performance of existing routes and to gauge the viability of potential new routes. Having this information will allow us to more effectively attract new service and retain our current service levels.

Implementation

- Subscription to Diio Mi reports.
- Staff will prepare annual and rolling three-month air seat outlook reports.

Contractors

- Reed Business Information (formerly Diio)
- Hawai'i Visitors and Convention Bureau (assisted by)

7.4.3 Hotel Performance

Project Description: This report monitors hotel occupancy rates, room rates, and revenue per available room produced monthly using hotel survey data compiled by STR, Inc., the largest survey of its kind in Hawai'i.

Implementation

- Subscription to STR, Inc. monthly and weekly hotel reports.
- Staff will prepare the Hawai'i Hotel Performance summary reports monthly for publication.
- Weekly reports are used for internal purposes only.

7.4.4 Hawai'i Timeshare Quarterly Report

Project Description: This survey monitors the state of Hawai'i's timeshare industry. The report includes survey results from state and county tax contributions, guest mix, employment and payroll expenses for Hawai'i's the industry.

Implementation

- The survey of Hawai'i timeshare companies was contracted through competitive bid.
- Staff will also compile quarterly basic data series (BDS) data for the contractor to use in their analysis.

Contractor: Kloninger and Sims Consulting, LLC

7.4.5 Vacation Rental Performance Tracking

Project Description: This is for the creation and launch of a Vacation Rental Monitoring System. The goal of this system is to provide benchmark performance statistics for vacation rentals similar to performance statistics reported for hotels and timeshare.

Implementation

- The development and implementation of this system was contracted through competitive bid.
- Monthly and annual reports will be prepared by island and resort region for occupancy and average daily rate.
- Staff will prepare the Hawai'i Vacation Rental Performance summary reports monthly for publication.

Contractor: Transparent, Inc.

7.5 Evaluation and Performance Studies Execution Plan

Program Overview: The Evaluation and Performance Measures program consists of various data collection and research projects that support the effective management of HTA programs. The program

also includes tourism forecasts and impact studies that help to assess Hawai'i's visitor industry relative to other competitive destinations.

Objectives

- Increase understanding of program performance and impact.
- Be able to conduct competitive destination assessments, track market share and monitor market/economic conditions.
- Establish a long-term program will support measurement monitoring process through an integrated contract management system.

Staff Leads

- Tourism Research Director – Jennifer Chun
- Tourism Research Manager – Minh-Chau Chun

Implementation

- See programs described below

Measurements

Output Measures	Performance Measures	Productivity Measures
Visitor Satisfaction & Activity Report	% of VSAT reports distributed on time	4 quarterly reports, 4 quarterly infographics, and 1 annual report
Resident Sentiment Study	% reports distributed on time	1 annual report, 1 presentation to HTA board
Marketing Effectiveness Study	% reports distributed on time	2 semi-annual reports
# of hits/clicks on the research & reports section of the HTA website	Decreased number of requests made for additional information, including requests for data that are currently not available	Increased data points and information published online

Contractor: See programs described below

7.5.1 Visitor Satisfaction and Activities Survey

- Post-trip survey of visitors to Hawai'i regarding satisfaction, activities and booking window.
- Revise Visitor Satisfaction Survey to be more brand-experience focused.
- Expand on experience with residents.
- Expand VSAT to include more island-specific survey questions.
- Time of Year: Year-round

Contractor: Anthology Marketing Group

7.5.2 Resident Sentiment Study

- Survey of Hawai'i residents and their attitudes towards tourism.
- Develop questions on Hawai'i's stewardship in culture and the environment.
- Time of Year: Fall

Contractor: OmniTrak Group

7.5.3 Marketing Effectiveness Study

- Monitoring of potential visitors and their awareness of selected brand attributes.
- Measure the marketing effectiveness by monitoring potential visitors and their awareness of selected brand attributes and media recall.

Contractor: OmniTrak Group

7.5.4 Tourism Forecast and Targets

- Continue to meet with DBEDT to enhance forecasts by markets.
- Maintain subscription to global tourism forecasts and local economic data.
- Time of Year: Year-round

Contractors

- Tourism Economics (global)
- UHERO (local)

7.6 Marketing Research Execution Plan

Program Overview: Marketing Research provides information on travelers' motivations, behaviors and decisions.

Objectives

- Increase awareness of available tourism research resources.
- Strengthen market intelligence.
- Increased use of tourism data and research for planning and marketing.
- Expand research efforts to analyze long-term travel trends to identify segments of high value and next generation of travelers.

Staff Lead: Tourism Research Director – Jennifer Chun

Staff Lead: Tourism Research Manager – Joseph Patoskie

7.6.1 Geographic Visitation Research

Project Description: TRD reports visitation by island based on Basic Data Series surveys. However, these surveys do not address travel to sites within each island. This program will provide estimates of visitation by market to all 94 zip codes and 710 selected points of interests (parks, trails, attractions, etc.) within the state.

Implementation

- Monthly visitation reports by visitors and residents will be prepared based on GPS location data which was contracted through competitive bid.
- TRD staff will prepare reports for publication.

Contractor: UberMedia

Agenda Item #6:

Presentation of the 2021 Local
Community Examination

DESTINATION MANAGEMENT RECOVERY ACTION PLANS FY 2021

PRESENTATION TO
HTA MARKETING STANDING COMMITTEE
JUNE 24, 2020

COLLABORATIVELY REBUILDING TOURISM KEY OBJECTIVES



Collaboration with our counties, communities, visitor industry, and other state/county agencies to define and set the direction for tourism.



Identify the appropriate balance between the economic benefits of tourism and impact on local services, natural and cultural resources, and residents' quality of life.



Facilitate destination management recovery action plans:

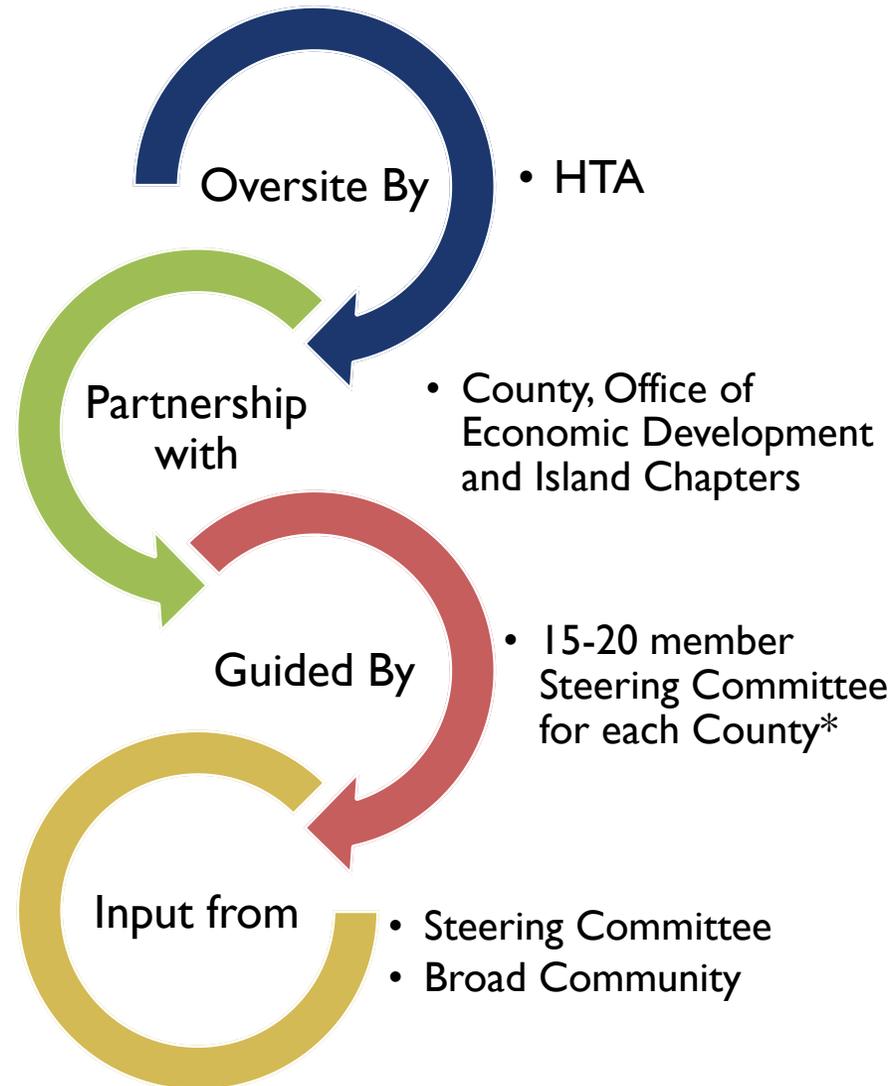
Partnership between community, county, island chapters, visitor industry, and other state entities.

Create opportunities for resident engagement in tourism development

Establish better systems for destination management

Improve current and develop new tourism products and offerings

COLLABORATIVE PROCESS

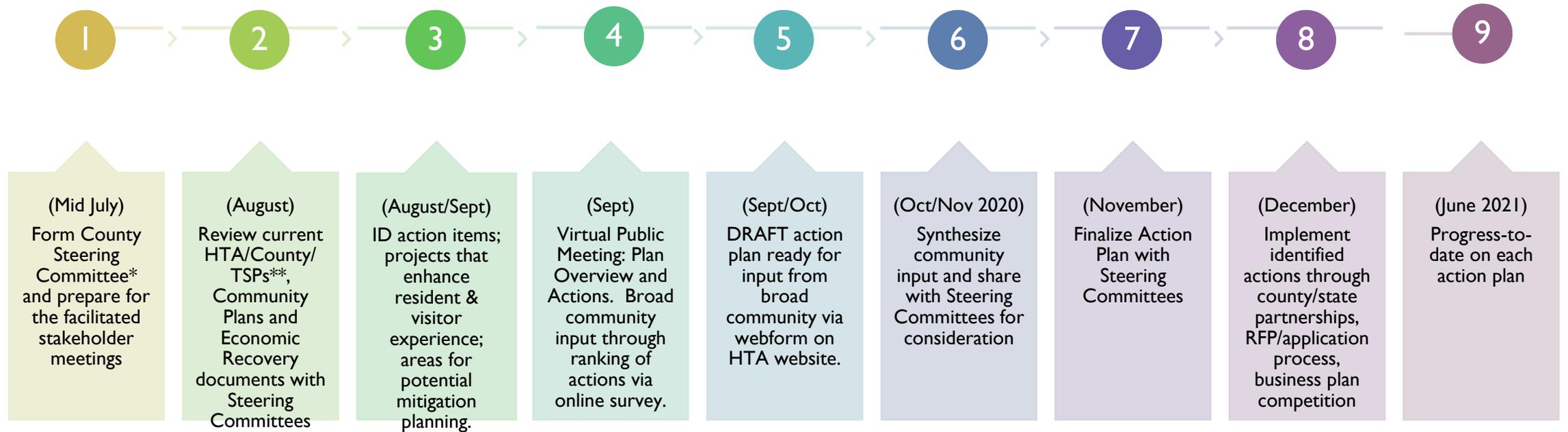


* Steering Committee includes representation from Island Chapter, Hawaiian Culture, Natural Resources, Hotel, Activities, Transportation, Agriculture, Chamber of Commerce/Business Association, Restaurant, Retail, Education, and Community members

HTA'S STRATEGIC PLAN – 4 PILLARS



OVERALL DESTINATION MANAGEMENT RECOVERY ACTION PLAN PROCESS:



*Steering Committee Members: County Office of Economic Development, Visitors Bureau, Hawai'i Lodging & Tourism Association – Island Chapter, and representatives for Hawaiian Culture, Natural Resource, Agriculture, State/County Parks, National Park Service, Activities, Transportation, Business Association/Chamber of Commerce, Restaurant, Retail, Education, and Community

** TSPs = Tourism Strategic Plans

END RESULTS

Action Plan with timelines developed in collaboration with community, visitor industry and other sectors for each county

```
graph TD; A["Action Plan with timelines developed in collaboration with community, visitor industry and other sectors for each county"] --> B["Prioritized actions/projects for short-term implementation"]; B --> C["Identified areas to manage for proactive mitigation planning"]; C --> D["Measures for Success"]; D --> E["Ready to invest in Winter 2020/Spring 2021 depending on the County"];
```

Prioritized actions/projects for short-term implementation

Identified areas to manage for proactive mitigation planning

Measures for Success

Ready to invest in Winter 2020/Spring 2021 depending on the County

PROGRAM MEASURES FOR SUCCESS

- ✓ Participants strongly rate these statements:
 - “I feel like I have a voice in my island's tourism development decisions”
 - “Tourism presents Native Hawaiian language and culture in an authentic manner”
 - “Provides opportunities for residents to be involved”
 - “Tourism is consistent with community values on this island”
- ✓ Improvement in resident sentiment study:
 - “I feel like I have a voice in my island's tourism development decisions”
 - “Tourism presents Native Hawaiian language and culture in an authentic manner”
 - “Provides opportunities for residents to be involved”
 - “Tourism is consistent with community values on this island”
- ✓ Number of prioritized projects completed within timeline
- ✓ Number of geographic locations/areas identified for mitigation
- ✓ Increased partnerships and synergies between tourism and other sectors, like agriculture, entrepreneurs
- ✓ Increased opportunities for broader community/residents to be involved in the tourism development process
- ✓ Increased communication with visitor industry, other sectors

PROPOSED BUDGETS*

	KAUA'I	HAWAI'I	MAUI NUI	O'AHU
Facilitated Stakeholder Mtgs [^]	\$ 30,000	\$ 30,000	\$ 35,000	\$ 30,000
Action Plan ^{^^}	\$ 0	\$ 0	\$ 40,000	\$ 45,000
HTA Funds for Implementation of Projects	\$745,000	\$745,000	\$700,000	\$700,000
On-Island Support for Projects	\$150,000	\$150,000	\$150,000	\$150,000
Total	\$925,000	\$925,000	\$925,000	\$925,000

**Pending Board Approval*

^ Facilitated Stakeholder Meetings: Kaua'i (4); Hawai'i (4); Maui Nui (7); O'ahu (5)

^^ Action Plans Foundation: HTA Strategic Plan; Kaua'i County Tourism Strategic Plan: 2019-2021; Kaua'i Economic Recovery Strategy Team Report (5/7/2020) – Tourism and Sustainability & Technology sections; County Tourism Strategic Plan approval in June 2020; Kīlauea Recovery Strategic Plan & Economic Recovery Plan (2020); Maui County Tourism Strategic Plan (TSP): 2017 to 2026; Moloka'i Island Community Plan (CP) Update (2018). O'ahu does not have a County Tourism Strategic Plan.

HTA INTERNAL TIMELINE

Start Date	End Date	Activity	Responsibility
June 8	June 8	Share PPT with Chris & Keith	Caroline/Kimi
June 9	June 19	Share project with County and Island Chapters/HVCB	Caroline
		Keith to speak with Mayors	Keith/Caroline
Wk of June 9	June 19	Develop Potential Steering Committee by island; input from counties and island chapters	Caroline/Kalani
Wk of June 9	June 30	Share with Marisa and AMG so they can start on a Communications Plan for this project	Marisa
Wk of June 15	June 26	Prepare RFP to develop action plans for Maui and O'ahu	Caroline/Contracts Team
Wk of June 15	June 26	Prepare RFP for a facilitator and recording (virtual live recording)	Caroline/Contracts Team
June 15	July 10	Build out new webpages for Community-Based Tourism Program with content	Caroline/Michele
June 25	June 25	Board approves FY 2021 Budget	
July 1	July 15	Publish RFPs for Writer/Facilitator/Recorder	Contracts Team
July 1	July 8	Send email inviting people to participate in the Steering Committee	Caroline
Jul 20	Jul 20	Selection of Plan Writer and Meeting Facilitator/Recorder	Contracts Team
July 24	August 7	Plan out Stakeholder meetings with HTA/County/Island Chapters/Meeting Facilitator/Recorder/Writer	Caroline/Kalani/Marisa
August 10	August 14	1 st set of Steering Committee/Stakeholder meetings* (zoom)	Caroline/Facilitator/Recorder

HTA INTERNAL TIMELINE (CONT.)

Start Date	End Date	Activity	Responsibility
August 24	August 28	2 nd set of Steering Committee/Stakeholder meetings* (zoom)	Caroline/Facilitator/Recorder
August 31	Sept 18	Draft 1 of Destination Management Recovery Action Plan (includes input from the committee)	Caroline/County/Writer
Sept 10	Sept 18	Presentation of Process and Priorities via Zoom. Broader community input obtained via ranking priorities. 3 rd set of Steering Committee meetings	Caroline/County/Steering Committee/Facilitator
Week of Sep 21	Week of Sep 21	Post on website	Michele
Week of Sep 21	Week of Oct 5	Broader community input to Draft 1 Action Plan	
Week of Oct 5	Oct 25	Synthesize community comments incorporate into Draft 2 Action Plans	Caroline/County/Writer
Oct 26	Nov 2	Provided Draft 2 to Steering Committees for final review	Caroline
Week of Nov 2	Nov 13	3 rd set of Steering Committee/Stakeholder meetings* (zoom) for approval of the Recovery Action Plan	Caroline/Facilitator/Recorder
Week of Nov 30	Week of Nov 30	Post Destination Management Recovery Action Plans on website	Michele
Week of Nov 30	Week of Nov 30	Issue out evaluation survey to steering committee and community members who provided comments via web	Caroline
Week of Dec 7		Start the implementation of the Destination Management Recovery Action Plans	HTA/Counties/other identified leads
June 20, 2021	June 30, 2021	Write progress-to-date on each action plan	Caroline/Counties

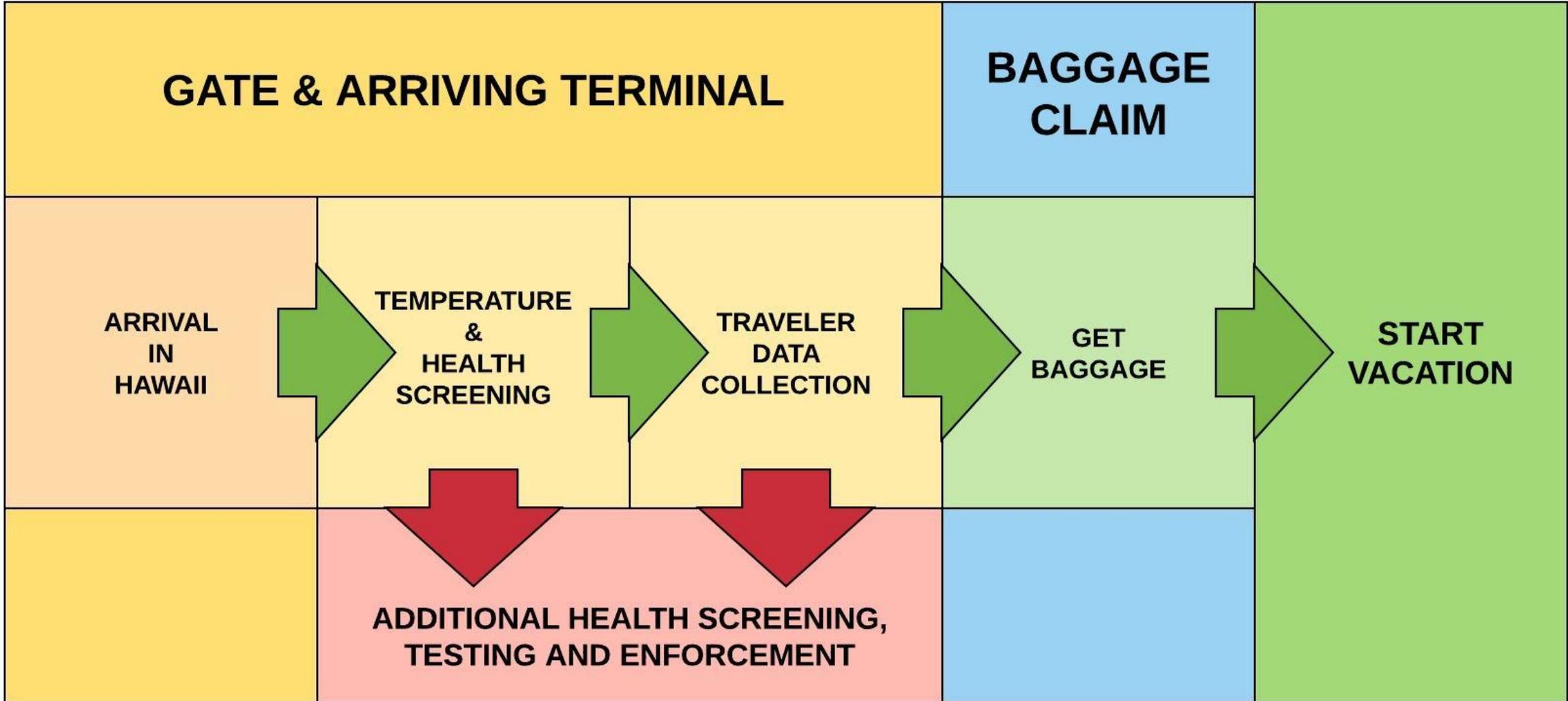
* Additional meetings for Moloka'i, Lāna'i, and possibly O'ahu.

Agenda Item #7:

Review of plans for Hawai'i as a
"Safe Destination"

Airport Arrival Process

for arriving Continental US (CONUS) and International Passengers



SPANISH Debe completar esta formulario antes de descender del avión. Si no le es posible leerlo en inglés, sírvase pedirle al auxiliar de vuelo un formulario en español.
 TAGALOG Ang pormalaryang ito ay dapat sagutin bago mag-"landing" ang eroplano. Kung hindi niyo mabasa ang pormalaryang ito, mangyari po lamang na humingi sa "Flight attendant" na ibang pormalaryang sa ibang tagalog.
 JAPANESE 降機する前にこの用紙を必ず記入し読んで下さい。この用紙が読めない場合は、乗務員に日本語の用紙を貰って下さい。
 KOREAN 좌항하기전에 이 양식에 반드시 기입하셔야 합니다. 이 양식을 읽지 못하면 승무원에게 한국어 양식을 요청하십시오.
 CHINESE 请在下机前填写完毕这份表格。如果不能读此表，请向乘务员索取一份中文表格。



STATE OF HAWAII
Department of Agriculture
PLANTS AND ANIMALS DECLARATION FORM
 MANDATORY DECLARATION
 FOR ALL PASSENGERS, OFFICERS, AND CREW MEMBERS



ALOHA and Welcome to Hawaii. Many plants and animals from elsewhere in the world can be harmful to our unique environment, agriculture, and communities. Please help to protect Hawaii by not bringing harmful pests into our state.

YOU ARE REQUIRED BY STATE LAW TO FILL OUT THIS AGRICULTURAL DECLARATION FORM. Any person who defaces this declaration form, gives false information, or fails to declare, prohibited or restricted articles in their possession, including baggage, or fails to declare these items on cargo manifests is in violation of Chapter 150A, Hawaii Revised Statutes, and may be guilty of a misdemeanor punishable, in certain instances, by a maximum penalty of \$25,000 and/or up to one year imprisonment. Intentionally smuggling a snake or other prohibited or restricted article into Hawaii is, in certain circumstances, a Class C felony punishable by a maximum penalty of \$200,000 and/or up to five years imprisonment.

One adult member of a family may complete this declaration for other family members.

A) I HAVE THE FOLLOWING ITEMS IN MY POSSESSION AND/OR BAGGAGE:

- Fresh Fruit & Vegetables
- Cut Flowers & Foliage
- Rooted Plants & Plant Cuttings, or Algae
- Raw or Propagative Seeds or Bulbs
- Soil, Growing Media, Sand, etc.
- Live Seafood (lobsters, clams, oysters, etc.)
- Cultures of Bacteria, Fungi, Viruses, or Protozoa
- Insects, Live Fishes, Amphibians, etc.

Please submit all of the above-marked items in your possession and/or baggage for inspection to a Hawaii Plant Quarantine Inspector in the baggage claims area. The cargo agent will submit cargo for inspection on your behalf.

B) I HAVE THE FOLLOWING ITEMS IN MY POSSESSION AND/OR BAGGAGE:

- Dogs
- Cats
- Birds
- Reptiles (Turtles, Lizards, Snakes, etc.)
- Other Animals

If you are traveling with any **LIVE ANIMALS**, you must **NOTIFY A CABIN ATTENDANT PRIOR TO DEPLANING**. All live animals must be turned in to the Honolulu Airport Animal Quarantine Holding Facility by the transportation carrier, not the passenger, upon arrival.

NONE OF THE ABOVE

PLEASE LIST THE SPECIFIC TYPES/NAMES OF THE ITEMS MARKED ABOVE.
 (Items meeting State requirements will be inspected and released.)

1 _____ 3 _____
 2 _____ 4 _____

Origin (State or Country) of above items _____

Full Name (Print) _____
 Home Address _____
 City _____ State _____ Zip _____
 Hawaii Address or Name of Hotel/Lodging _____
 Island _____ Phone No. _____ - _____ - _____ No. in Party _____
 Name of Airline/Ship _____ Flight No. _____ Date of Arrival _____ / _____ / _____

Signature _____ Date _____

58844





STATE OF HAWAII
HAWAII EMERGENCY MANAGEMENT AGENCY
3949 DIAMOND HEAD ROAD
HONOLULU, HI 96816

ORDER FOR SELF-QUARANTINE

On March 4, 2020, the Governor of the State of Hawai'i proclaimed a state of emergency in response to the COVID-19 pandemic, and on March 13, 2020, the President of the United States of America declared a national emergency. As part of the effort to contain the spread of COVID-19, on March 31, 2020, the Governor ordered all persons traveling to and between islands in the State of Hawai'i to self-quarantine and has adopted Rules Relating to COVID-19.

Pursuant to the Governor's proclamation and the Rules Relating to COVID-19, the Director of the Hawai'i Emergency Management Agency (HIEMA) hereby orders you to comply with the following:

- 1. Fully complete and sign the mandatory State of Hawai'i Department of Agriculture Plants and Animals Declaration Form or the Interisland Declaration Form.

(initial)

- 2. Proceed directly from the airport to your designated quarantine location, which is the location identified and affirmed by you on the applicable form identified in Section 1.

- a. If you are a resident, your designated quarantine location is your residence.
- b. If you are a visitor, your designated quarantine location is your hotel room or rented lodging.

(initial)

- 3. Remain in your designated quarantine location for a period of 14 days or the duration of your stay in the State of Hawai'i, whichever is shorter.

- a. You may leave your designated quarantine location only for medical emergencies or to seek medical care.

(initial)

- 4. Do not visit any public spaces, including but not limited to pools, meeting rooms, fitness centers or restaurants.

(initial)

- 5. Do not allow visitors in or out of your designated quarantine location other than a physician, healthcare provider, or individual authorized to enter the designated quarantine location by the Director of HIEMA.

(initial)

- 6. Comply with any and all rules or protocols related to your quarantine as set forth by your hotel or rented lodging.

(initial)

The knowing and intentional failure to follow any part of this order constitutes a criminal offense punishable by a fine of not more than \$5,000, or imprisonment of not more than one year, or both.

I, _____, declare under penalty of law that I have received, read and understood the above Order for Self-Quarantine.

(Print Name)

(Signature)

(date)

Unique Government ID Number
(for example, Driver's License Number)

Witnessed by _____, on _____.
(Screener Name [print]) (date)

Verification:

CP:
LR:
RA:

(Screener Signature)

Screener AOA or Company Number

