



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

**REGULAR BOARD MEETING
HAWAII TOURISM AUTHORITY**

Po'ahā, 25 Iune 2020, 9:30 a.m.
Thursday, June 25, 2020 at 9:30 a.m.

Kikowaena Hālāwai O Hawai'i
Papahale 'Ekolu - Lumi 314
1801 Alaākea Kalākaua
Honolulu, Hawai'i 96815

Hawai'i Convention Center
Third Floor - Room 314
1801 Kalākaua Avenue
Honolulu, Hawai'i 96815

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

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

Face coverings and physical distancing are required in HTA offices and meetings.

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

Entrance to the Hawaii Convention Center requires a health screening at the center parking garage entrance. Persons with a temperature of over 100.4°F will be denied entry.

If you are not feeling well, we urge you to contact a healthcare provider.

Papa Kumumana'o
AGENDA

1. *Ho'omaka A Pule*
Call to Order and Pule
2. *'Āpono I Ka Mo'o'ōlelo Hālāwai*
Approval of Minutes of the May 28, 2020 Board Meeting
3. *Hō'ike Lālā*
Report of Permitted Interactions at an Informational Meeting or Presentation Not Organized by the Board Under HRS section 92-2.5(c)



4. *Hō'ike A Ka Luna Ho'okele*
Report of the CEO Relating to Staff's Implementation of HTA's Programs During May 2020:
 - Major Market Management including Destination Marketing Management Services, Global Meetings, Conventions and Incentives (MCI) Program Management Services, Responsible Tourism, Support of State COVID-19 Mitigation Efforts
5. *Hō'ike A Ka HTA Me Ka 'Oihana Alakau*
Presentation by HTA and Hawaii State Department of Transportation on the Current 14-Day Mandatory Quarantine Process for Arriving Passengers at Hawaii's Airports. The Presentation will Include an Overview of Data Collection, Screening, Verifying, Scanning, Database, and the Call Center
6. *Hō'ike A 'Āpono I Ke Kuahaua 'Āina Aloha*
Presentation and Adoption of the 'Āina Aloha Economic Futures Declaration and of their 4-Step Process of Taking Action to Bring to Life a Resilient Economy Through our Core Value of 'āina aloha-a Deep and Abiding Love for Hawai'i's Communities and Natural Environment
7. *Hō'ike 'Ikepili Noi'i 'Oihana Ho'omāka'ika'i*
Presentation and Discussion of Current Market Insights and Conditions in Hawai'i and Key Major Hawai'i Tourism Markets, Including the United States, Japan, Canada, Oceania, Other Asia, Europe, and Cruise
8. *Kūkākūkā A 'Āpono I Ka Mo'ohelu Makahiki Kālā 2021*
Discussion and Approval of the Fiscal Year 2021 Budget for the Hawai'i Tourism Authority
9. *Hō'ike No Ke Kau 'Aha'ōlelo 2020*
Update Relating to the 2020 Legislative Session and Related Bills Relevant to HTA
10. *Hō'ike A Ke Kōmike Hokona Kūmau No Ke Kūkākūkā A Ho'oholo*
Report of the Marketing Standing Committee with the Committee's Recommendations to Support Various Marketing Proposals, for Discussion and Action by the Board
11. *Hō'ike A Ke Kōmike Ho'okele Kūmau*
Report of the Administrative Standing Committee with the Committee's Recommendations on the Establishment of a Permitted Interaction Group Serving as a Selection Committee to Guide the Search for the Next HTA President and Chief Executive Officer, with Members to be Recommended by the Committee
12. *Kūkākūkā A 'Āpono I Ka Hui Ho'opiha Kūlana Pelekikena A Luna Ho'okele*
Discussion and Approval of the Establishment of a Permitted Interaction Group Serving as a Selection Committee to Guide the Search for the Next HTA President and Chief Executive Officer



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David Y. Ige
Governor

Chris Tatum
President and Chief Executive Officer

13. *Ho'oku'u* Adjournment

*** *Aha Ho'okō: Ua hiki i ka Papa Alaka'i ke mālama i kekahi hālāwai kūhelu i kū i ka 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 komo mai i ka hālāwai a ho'ouna mai i ka 'ōlelo hō'ike kākau 'ia no kēia kumuhana i helu 'ia ma ka papa kumumana'o. Hiki ke ho'ouna mai i nā 'ōlelo hō'ike kākau 'ia ma mua o ka hālāwai iā carole@gohta.net a i 'ole ma o ke kelepa'i. Inā pono ke kōkua ma muli o kekahi kīnānā, e ho'omaopopo aku iā Carole Hagihara (973-2289 a i 'ole carole@gohta.net), he 'ekolu lā ma mua o ka hālāwai ka lohi loa.

Members of the public are invited to attend the public meeting and provide written testimony on any agenda item. Written testimony may also be provided by submitting the testimony prior to the meeting by email to carole@gohta.net or by facsimile transmission. Any person requiring an auxiliary aid/service or other accommodation due to a disability, please contact Carole Hagihara (973-2289 a i 'ole carole@gohta.net) no later than 3 days prior to the meeting so arrangements can be made.

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**Approval of Minutes of the May 28, 2020
Board Meeting**



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David Y. Ige
Governor

Chris Tatum
President and Chief Executive Officer

**REGULAR BOARD MEETING
HAWAII TOURISM AUTHORITY
Thursday, May 28, 2020
VIRTUAL MEETING**

MINUTES OF REGULAR BOARD MEETING

MEMBERS PRESENT:

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

HTA STAFF PRESENT:

Chris Tatum, Keith Regan, Pattie Herman, Marc Togashi, Kalani Ka'anā'anā, Marisa Yamane, Jennifer Chun, and Caroline Anderson

GUESTS:

Representative Richard Onishi

LEGAL COUNSEL:

Gregg Kinkley

1. Call to Order and Pule:

HTA Chief Administrative Officer Keith Regan announced the beginning of the meeting at 9:30 AM and conducted a roll call. All Board members were present. At 9:33 AM, Mr. Regan turned the floor over to Chair Rick Fried. Chair Fried recognized Kalani Ka'anā'anā, who opened the meeting with a pule, describing the intention of bringing new energy and new light in response to shifting circumstances.

2. Approval of Minutes of the February 27, 2020 Board Meeting:

Chair Fried confirmed approval of the meeting minutes from the February Board meeting by roll call.

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

Chair Fried asked the Board whether there were any permitted interactions to report, and David Arakawa responded that he is a member of Governor David Ige's Working Group on Economic Recovery for the Construction and Housing Section. As part of that assignment, Mr. Arakawa needed to ensure that construction workers were able to travel interisland, and viewed the screening process for arriving passengers at the airport. He commended HTA and requested a presentation from HTA and the Department of Transportation (DOT) regarding the screening and contact tracing programs at the next Board meeting.

Chair Fried thanked Representative Richard Onishi for attending.

Chair Fried then said that there are over 200,000 people employed in the travel industry that need to go back to work. He added that a date needs to be set to reopen Hawai'i so that the industry can plan around that date. Chair Fried continued that Hawai'i could arguably reopen mainland travel sooner than people might think, hopefully by July 1st, based on the number of ICU hospital beds available in the event of a spike in cases.

4. Report of the CEO Relating to Staff's Implementation of HTA's Programs during February - April 2020:

Chair Fried recognized HTA Chief Executive Officer Chris Tatum to present his report. Mr. Tatum said that in January there were about 27,800 visitor arrivals per day, and in February, there were about 28,500 visitor arrivals per day. After the first emergency proclamation on March 5th, HTA suspended its marketing campaigns and focused more on providing information from the Department of Health (DOH) and the Center for Disease Control to industry partners and travelers. In March, daily visitor arrivals decreased to about 14,000. On March 17th, Gov. Ige encouraged tourists to postpone their vacations and to limit social gatherings to 10 people. Mr. Tatum noted that HTA began an active campaign discouraging visitors from coming to Hawai'i in support of the governor's mitigation efforts. On March 21st, the governor issued his Emergency Proclamation instituting the 14-day quarantine for all arriving visitors. He said that HTA and DOT developed the programs for the screening and follow-up call processes. To date, the call center made 40,000 follow up calls to visitors and residents reminding them of their quarantine obligations and inquiring about their health situation.

On April 6th, HTA started its "Hotels for Heroes" program, where rooms were provided to healthcare providers and first responders throughout the state with over 90 hotels participating. Mr. Tatum explained that HTA paid an \$85.00 discounted rate to house and support workers separated from their families, which accounted for 2,547 room nights throughout the state. He added that the program has since concluded, but is on reserve for the fall in the event of any future need. Mr. Tatum noted that the number of COVID-19 cases has significantly decreased from its peak of 34 new cases per day in April to its current low levels.

Mr. Tatum expressed appreciation to healthcare workers, first responders, government leaders, and residents for coming together to mitigate the spread of the virus. Mr. Tatum also thanked the employees at HTA, the airports, hotels, John Monahan at Hawai'i Visitors and Convention Bureau (HVCB), Mufi Hannemann at Hawai'i Lodging and Tourism Association (HLTA), and others for collaborating to discourage travel and implement the most restrictive quarantine in the country to ensure the safety of the community. He added that HTA continues to support mitigation efforts working with all departments of the government, the industry, and the Legislature to restart the economy while being mindful of Hawaiian culture, the environment, and the community.

Mr. Tatum commended Mr. Regan and Marisa Yamane, the HTA Director of Communications and Public Relations, for their involvement and efforts. He added that the team has been very active over the past couple months and has been collaborating with the industry and the administration. Mr. Tatum expressed that the economy needs to be restarted collaboratively. As an organization, HTA must continue to abide by the guiding principles of the 5-year Strategic Plan, bringing business back the right way, perpetuating Hawaiian culture, involving the community, and protecting the environment. He noted that \$925,000 is allocated to each county in the proposed FY 2021 budget to promote engagement with the community and county agencies so that they are part of the process of welcoming visitors back, establishing better systems for destination management, and improving current and developing new tourist products and offerings. HTA needs to be a leader in opening the industry and getting people back to work in a responsible way. Residents want a safe environment for their families, and high value travelers also want to know that they are traveling to a safe destination. Mr. Tatum thanked the team for their hard work to make Hawai'i a safe place.

Chair Fried added there are other states at similarly low levels of cases like Alaska, but Hawai'i is the only state among those with a major urban area.

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

Chair Fried recognized Jennifer Chun to discuss market insights and conditions. Ms. Chun discussed the statistics as contained in the Board packet. She noted that visitor arrivals for April are down 99.5%, with less than 5,000 visitors, and that every island's numbers were down substantially. Ms. Chun added that because arrivals are so low, no spending data was available for April and would likely continue to be unavailable for May and possibly June. She then noted that air seats were down 91.4%, and there was no cruise activity.

Kyoko Kimura asked if the hotel occupancy statistics include occupancy from the "Hotels for Heroes" program. Ms. Chun responded in the affirmative and that the numbers also include

crew contracts.

Chair Fried noted that some people have been concerned about the number of people still arriving, but that the vast majority of those arrivals were for people visiting family, and not visitors. Ms. Chun agreed that the number of people visiting for leisure purposes is very low compared to normal. She added that a large number of arrivals are exempt workers, military families, or intended residents.

Kimi Yuen asked what is included in the “Other” category on the daily report for arrivals and why that category exists. Ms. Chun replied that the new arrival forms reduced the number of categories for the traveler’s purpose of trip. She then explained that people whose trip purpose do not fit the available categories write in their responses on the arrival forms. Many of the recent written responses have included returning students. Ms. Chun added that any arrivals not included in the leisure, business, or visiting friends and family categories are collectively grouped in the “Other” category on the daily reports.

6. Presentation, Discussion and Action on HTA’s Financial Reports for February, March, April 2020:

Chair Fried recognized Mr. Regan and Marc Togashi, HTA Vice President of Finance, to present the financial reports. Mr. Togashi discussed the Executive Summary as contained in the Board packet. He noted that as of April 30, HTA has \$91.5 million in cash including the \$5 million from the emergency fund. He added that through April, budget utilization is at \$71 million of HTA’s \$81.6 million FY 2020 budget, which includes \$1.1 million in funding for HTA’s response efforts to COVID-19.

Mr. Togashi then discussed the Budget Reallocation Summary as contained in the Board packet. He highlighted that \$170,000 was reallocated to the Hawaiian Cultural Opportunity Fund for ‘Iolani Palace repairs, among other projects. He then noted that \$1 million was reallocated for the Hawaiian Center for Music and Dance for the purpose of tracking unspent funds. He added that \$54,000 was reallocated to the Community Program Opportunity Fund for the COVID Challenge Awareness Project.

Mr. Togashi then discussed the HTA Budget Statement Summary as contained in the Board packet. He noted that HTA recorded \$65.8 million and \$13.7 million YTD in TAT revenues for the Tourism Special Fund and the Convention Center Enterprise Special Fund, respectively. Mr. Regan added that all budget documents will be posted on the HTA website for the public to view.

Chair Fried asked whether the budget documents as presented in the Board packet are the finalized numbers through April. Mr. Togashi responded in the affirmative.

Ms. Kimura asked what the “-\$1 million” for China means. Mr. Togashi replied that HTA

reduced the Hawai'i Tourism China marketing contract by that amount through April. HTA Vice President of Marketing and Product Development Pattie Herman added that the contract was reduced back when China Eastern Airlines stopped flying into Hawai'i and that the contract will be terminated moving forward. Mr. Tatum then noted that the money remaining in the budget is \$680,000 that had already been spent in FY 2020.

Fred Atkins asked whether the \$71 million spent in FY 2020 is the final number including all encumbrances, and whether the remaining money will be used in the FY 2021 budget. Mr. Togashi responded that the team has identified savings opportunities, and that the team expects the \$71 million to be reduced to about \$48 million by the end of the fiscal year. Mr. Atkins then asked whether those savings would be included in the FY 2021 budget. Mr. Togashi responded in the affirmative and added that the FY 2021 budget includes all of HTA's reserves, including the \$5 million from the emergency fund, except for the \$6.2 million allocated for the Hawaiian School of Music and Dance and \$9 million in funds previously set aside for medical insurance and state employee retirement benefits.

Chair Fried requested a motion to approve the financial reports. Kelly Sanders made a motion, which was seconded by Daniel Chun. The motion passed unanimously by roll call.

7. Review of the Proposed Budget for the Hawai'i Tourism Authority for Fiscal Year 2021:

Chair Fried recognized Mr. Tatum and Mr. Regan to discuss the proposed HTA budget for FY 2021. Mr. Tatum said that HTA had a budget of \$86 million last year. He added that this year HTA made adjustments that were appropriate based on the market and funds that HTA committed to measures mitigating the virus. He said that the team reviewed every line item. Revenues from TAT have ceased, and the budget is based on the assumption that HTA will not receive any TAT revenues for FY 2021. Mr. Tatum said the proposed budget for FY 2021 is \$55 million which appropriately prioritizes programs based on the funding available. Mr. Tatum noted that HTA terminated its marketing agreements in Southeast Asia, China, Taiwan, and Europe. He expressed that the priorities are the mainland U.S., Japan, Korea, Oceania, and Canada. Mr. Tatum noted that the marketing priorities are based on revenue historically brought into the state. He added that \$925,000 is allocated to each county to facilitate and implement a destination plan for each county. Mr. Tatum then said that some money is allocated for sports, but the Sports budget decreased from \$7.2 million down to \$3 million, which includes the PGA golf tournaments in January should they take place, the Maui Invitational, the Hawai'i Bowl, the Diamond Head Classic, and the Polynesian Bowl. He expressed that he wants HTA to support University of Hawai'i (UH) athletic programs, which can serve as an ambassador for Hawai'i. The funding reflects HTA's plans to partner with UH at football games in Oregon and San Jose State and be sponsors in those key U.S. mainland markets. He added that HTA is planning to partner with UH volleyball if they travel to Japan next year and to be a sponsor with the Big West conference providing exposure in the key market in Southern California. However, there is no funding for any of the other major sports programs.

Chair Fried commented that it makes sense to focus on the five major markets and that the budget cuts are not permanent, but temporary.

Mr. Regan commented that without any new revenues from TAT, HTA must work with the limited funding available. He commended the team for their hard work and effort in creating a budget that represents a significant reduction from \$86 million to \$55 million.

Mr. Regan recognized Mr. Ka'anā'anā to discuss the proposed budget for Perpetuating Hawaiian Culture. Mr. Ka'anā'anā said that HTA will be more focused on its key objectives which include (1) supporting daily use of the Hawaiian language, (2) ensuring accurate portrayal of Hawaiian culture by HTA's marketing contractors, (3) encouraging accurate portrayal of Hawaiian culture by visitor industry marketing and visitor experiences, (4) promoting understanding and respect for Hawaiian cultural practitioners, cultural sites, and (5) resources, and providing the visitor industry with Hawaiian cultural education and training opportunities for its workforce. The Hawaiian Initiative primarily includes the Naha contract and a program in the works to get Hawaiian organizations more involved in the visitor industry (i.e., including tourists in their business plans as a source of revenue). He added that a small amount of funding was included in marketing support to assist Ms. Herman and the marketing team in ensuring that Hawaiian culture is accurately portrayed.

Ku'uipo Kumukahi thanked everyone for their hard work. She added that there needs to be a connection between visitors and the Hawaiian community, and education will be embedded in that connection. Ms. Kumukahi advocated that the Hawaiian Culture budget needs to be increased in the future to support Hawaiian businesses and entrepreneurs, which economically benefits Hawai'i for the next seven generations. She noted that the large marketing budget is dedicated to promoting the Hawai'i brand and preserving the brand requires maintaining Hawai'i's natural resources. Ms. Kumukahi added that this will require a collaborative effort. She explained that this current respite for Hawai'i's natural resources is an opportunity for change, looking to the past as Hawai'i moves forward into the future.

Mr. Tatum noted that he and Ms. Kumukahi are aligned in their vision. He added that Mr. Ka'anā'anā will be part of the leadership for the funds in the proposed budget set aside for community collaboration because the community, the Hawaiian people, and the proper respect for the land and its history is an important part of the process.

Mr. Atkins asked how much funding is for new programs and how much of the funding is for existing programs. Mr. Ka'anā'anā replied that all of the funding is for new programs. HTA has each program apply on an annual basis.

Mr. Ka'anā'anā then discussed the proposed budget for Natural Resources. He said that 'Aina Aloha ("Beloved Land") would guide HTA's efforts because 'aina is the thing that sustains Hawai'i and its people, and HTA would employ strategies that place the responsibilities of stewardship at the core of what HTA does. The key objectives would be to

(1) manage, protect, and improve natural resources, (2) engage and encourage active management, and (3) build alignment within the industry. The Visitor Impact Program is HTA's partnership with and support for the Department of Land and Natural Resources (DLNR).

Mr. Regan recognized Caroline Anderson, the HTA Director of Community Enrichment, to discuss the proposed budget for Community. Ms. Anderson said that HTA is proposing a new initiative in partnership with the individual counties, allocating \$925,000 to each county. She then said that the hope is that this initiative will aid state and county economic recovery efforts and reset tourism. Ms. Anderson added that HTA will facilitate and be the catalyst that brings the various stakeholders together from the community, the visitor industry, and local and state agencies. She said that the goal is to find the appropriate balance between the economic benefits of tourism and the impact on local services, natural and cultural resources, and residents' quality of life. She noted that the end result would be a collaborative destination management action plan for each county, which would create opportunities for resident engagement in tourism development, establish better systems for destination management, and improve current and develop new tourism products and offerings. Ms. Anderson added that she would be working with Ms. Yamane and Mr. Ka'anā'anā in this endeavor.

Ms. Kimura expressed her appreciation for the team's hard work in preparing a budget with such a significant cut in funds and noted that Maui County has three islands.

Rep. Onishi noted that in the past, the Community budget included an RFP to fund programs. He asked whether there would be any funding for an RFP this coming fiscal year for community organizations under the proposed budget. Ms. Anderson responded that there is currently no funding in that category because HTA does not know whether any gatherings or festivals will be able to occur. Due to the uncertainty, HTA is proposing to proceed in this direction for now and, should these opportunities arise, they can reallocate funds. Rep. Onishi then said that this proposed budget is for FY 2021, and no one will know what the situation will be like by then, but if any community programs can occur there would be no available funding. Mr. Tatum replied that the proposed budget is based on the assumption that there would be no TAT revenues available. He added that should that change, there will be opportunities to add funding to line items in the budget that were cut. Mr. Tatum then said it is important to go into this community engagement project with an open mind and identify the priorities for the counties and the communities, not necessarily the priorities for HTA. Rep. Onishi asked how this \$925,000 appropriation was determined. Mr. Tatum replied that the number is based on what they felt was appropriate for an entire fiscal year given the budgetary restraints. The budget has not been broken into line items yet, and they would come to the Board during the actual process of doing that. He said that they don't know if it will take this much money, but the process will be ongoing and evaluated. Mr. Tatum said that this is new for HTA and the funds are the benchmark currently set aside. Rep. Onishi then said that the block funding makes it difficult for him to do any advocacy on behalf of HTA with Gov. Ige to restore any kind of funding. He noted

that the funding allocation is by statute and not embedded in the state's budget, and Gov. Ige has suspended this particular statute. Rep. Onishi added that he has no reason to advocate to Gov. Ige to reverse that decision without being able to support specific programs. Mr. Tatum expressed his understanding and added that it is currently very difficult to project a budget without a more clear understanding of how things will develop in the future. He also expressed concern that the ramp up will take a while and noted that he would include projected numbers if he could.

Mr. Atkins said that when he started on the Board, there was a push to cut back HTA's set programs that could not fund themselves without assistance from HTA. He noted that there was a big, public outcry about trying to do that. Mr. Atkins asked with whom the team has vetted this program and what has been the feedback to the fact that set programs would be cut back for the immediate future and replaced with this initiative. He expressed concern there would be push back on cutting the set programs. He said that he would like to see more detail about this initiative and suggested that if there are four or five programs that the counties feel are indispensable perhaps including those within this initiative. Mr. Atkins then said that maybe HTA needs to lobby the Legislature for more funding because there are some programs that are critical to the tourism industry. Ms. Anderson responded that she has not spoken with the counties or island chapters yet because the proposed budget requires approval by the Board and then she would communicate with the counties about what the program would entail and work together with the counties from there. She added that she had already spoken to 60 community enrichment contractors to terminate their contracts so that funds would be available for the coming fiscal year. Mr. Tatum then said part of this process is communicating with the counties and communities to see what is important to them and have a blank sheet with set priorities that will evolve over time. Mr. Atkins then asked how much did HTA fund set programs in FY 2020 across all islands. Ms. Anderson responded that it was more than \$2 million in set program initiatives. Mr. Atkins said that he likes the concept, but shared some of Rep. Onishi's concerns. He added that he is hearing community concerns about restarting tourism and that there needs to be an effort of listening once there is a more concrete plan.

Mr. Arakawa expressed two concerns regarding the community enrichment programs. First, he asked that if the community says that events like Merrie Monarch, Prince Lot, or Ironman are important to tourism then that would be a consideration for use of the \$925,000. Mr. Tatum responded in the affirmative. Second, in developing this program, he suggested reserving a third or half of the funding where HTA makes the final decision concerning certain programs with community input. There may be some programs that the community might not think are important, but industry leaders and experts know are integral. Doing so would provide HTA with flexibility and provide Rep. Onishi and Senator Glenn Wakai with the impetus to advocate for funding on HTA's behalf. Mr. Tatum responded that the intent of the program is not to give the money directly to the counties, but rather allocate money to fund programs important to the communities. He added that it will be beneficial from a branding standpoint because the communities will know what is important to visitor experience and positive for residents. Mr. Arakawa cautioned that it is

important that everyone has a say, but when it comes down to it, only one person can make the final decision. Ms. Kumukahi added to not forget to include the Hawaiian civic clubs, the Native Hawaiian Chamber of Commerce, ethnic diversity groups, Homestead organizations, and Ali'i organizations in the conversation to bring a diverse community together. Mr. Tatum responded that the plan is to include the Board as advisors in this process.

Mr. Chun commented that this community engagement and effort is important to economic recovery and intersects all the HTA pillars. He added that people have been talking about diversification of the economy. Mr. Chun then said that these community meetings could be a fruitful place for discussion about how to use tourism as a base for diversification, as well as how to make tourism an export and sustainable for everyone. Mr. Tatum thanked Mr. Chun for his comments and noted that Hawai'i is not in a bubble and new ideas and opportunities should arise from these meetings.

Rep. Onishi asked why the process of community engagement for Community is not the same as determining the priorities for Hawaiian Culture and Natural Resources. He then noted that by statute the counties are allocated TAT funding specifically for tourism impact. The Legislature does not have the ability to hold the counties accountable for how they spend that money to mitigate tourism impact. Rep. Onishi stated that the role of HTA is to market Hawai'i and its experiences as a product and to enhance those experiences and resources so there is something for people to see. Rep. Onishi cautioned about overextending into other people's responsibilities. For example, he mentioned DLNR's role in protection of the natural resources, which is DLNR's responsibilities and HTA supports them with funding. He noted that there was a movement in the Legislature to give HTA funding directly to the agencies that HTA supports. Rep. Onishi suggested that the process of community engagement should extend to all three areas. He then said there are two timelines in place for reopening tourism. One is reopening the state to people traveling to visit, over which HTA has no control. HTA has control over the other timeline and can issue rhetoric and guidelines for the hotel and tourism industry. There needs to be a time table in place to set expectations when this will be accomplished because the reopening may occur sooner than expected. Rep. Onishi expressed concern that the reset of tourism could occur before any of these initiatives are put in place. Mr. Tatum responded that they will look at these processes to ensure that the initiatives will have the biggest impact as possible in the communities, including the visitor industry. Mr. Ka'anā'anā added that the objectives for Hawaiian Culture and Natural Resources are based on the 5-year Strategic Plan adopted in January, which will surface from the community through the RFP process. Mr. Atkins agreed with Mr. Ka'anā'anā and said that any funding to the counties need to incorporate the four pillars and be in line with the 5-year Strategic Plan. Micah Alameda thanked the team for their hard work and noted that the \$925,000 will go to great use in Hawai'i County. He expressed confidence that the things in place will hit the ground running once the funding is in place.

Mr. Regan recognized HTA Vice President of Marketing and Product Development Pattie Herman to discuss the proposed budget for Branding. Ms. Herman said that funding will be

devoted to the major markets of U.S. mainland, Japan, Canada, Oceania, and Korea, which is based on total expenditures from the past five years. She added that the marketing contracts in the smaller markets would be terminated. She noted that about 74% of the budget would be allocated for marketing to the U.S. mainland. Ms. Herman said that the message HTA is sending is in line with the 5-year Strategic Plan and the four pillars, and that Hawai'i is a safe and healthy destination. Mr. Tatum added that the funding could be reallocated based on what is happening in those specific markets. For example, Oceania has a quarantine that likely will not end until the end of the year.

Ms. Kimura commented that travel sentiment everywhere shows that people do not want to travel far for a while, and Hawai'i is far from everywhere. She noted that a survey in Japan said Japanese people do not want to travel outside of Japan. Ms. Kimura suggested placing an even heavier emphasis on the U.S. West Coast. Ms. Herman responded that the Tokyo area has a high number of repeat guests and as the Tokyo market begins to open, in discussion with Hawai'i Tourism Japan, the aim would be to encourage repeat guests to travel to Hawai'i again.

Benjamin Rafter asked whether there is flexibility to reallocate funds as quarantine and travel restrictions lift in different markets. Ms. Herman responded in the affirmative.

Mr. Atkins asked if there are marketing strategies in place for the funding. He also asked whether the significant cut for Island Chapter Staffing includes staff reductions and if that has been discussed with them. In response to the second question, Ms. Herman said that the plan has not discussed been with them, but was the recommendation of HVCB. She then said in response to the first question that HVCB's plan is to keep pounding message of safety and health. Mr. Tatum added that the process for focusing on specific markets is ongoing and that there will be an RFP put out to the marketing contractors to present plans which will be presented to the Marketing Committee. He said that the "Share Aloha" and "Rooted in Kuleana" campaigns were well received and that he would like a consistent message in all the markets moving forward.

Mr. Tatum discussed the proposed budget for Sports. Mr. Tatum noted he covered most of what he had wanted to say in his earlier comments. Though he added that the sporting events allocated funding, besides the PGA tournaments which are 4-year commitments, are mostly for branding. He said the situation is fluid as it depends on whether fans are able to attend any of the sporting events.

Mr. Atkins asked whether the World Sprints for paddling in Hilo have been postponed. Mr. Ka'anā'anā replied that the 2020 event was canceled by the International Va'a Federation (IVF). IVF is looking to Hawai'i to submit a bid to host the event in 2024. He said HTA canceled the contract, and the contractor returned the funds. Mr. Ka'anā'anā added that three other paddling events had also been canceled.

Mr. Regan then discussed the proposed budget for Safety and Security. Mr. Regan said that

despite the significant budget cuts, HTA would continue to provide funding for VASH and other visitor assistance programs. He then said that HTA would continue to provide funding for supporting mitigation and safety measures for COVID-19, like call centers, airport screening, etc. Mr. Regan said they have notified all lifeguard programs that HTA has to withhold funding for the coming fiscal year. He noted that the counties all understood the situation and appreciated HTA's willingness to reengage should circumstances change. Mr. Regan said that HTA is also cutting funds for the ocean safety and COVID-19 PSAs that run in the baggage claims of airports statewide, but added that HTA would also reengage with the contractors should the situation change.

Ms. Kumukahi asked for further explanation of the budget cuts for the lifeguard programs. Mr. Regan replied that HTA had been providing funding to each county and their Junior Lifeguard programs in 2020. The funding helped them purchase equipment for beaches that residents and visitors frequently visit. Ms. Kumukahi asked how much more at risk will people be subject to without HTA funding. Mr. Regan responded that the lifeguard programs have already replaced a significant amount of equipment with HTA funding and they still have county funding.

Ms. Yuen commented that the preventative programs are needed to help residents feel safe as visitors start to return to Hawai'i. She asked whether it may be possible to cut funding elsewhere. Mr. Regan responded that the state has the ability to run a limited PSA on those screens. He said that the PSA's may still be running, but less frequently without HTA funding. Mr. Tatum added that sharing Hawai'i's safety protocols will be a key part of the branding message moving forward. Mr. Atkins seconded Ms. Yuen's concern and suggested perhaps reaching out to the counties for assistance.

Rep. Onishi asked whether absorbing some of the cost for COVID-19 screening and contact tracing would be HTA's responsibility, or whether HTA has discussed with the Administration about reimbursement from federal funding provided to the state. He noted that this may free up funding for the safety PSAs in the airports. Mr. Regan responded that HTA has been exploring avenues of reimbursement for its expenditures during the COVID-19 crisis, and there may be other places in the budget to find funding for the preventative programs. Rep. Onishi commented that there needs to be someone who will handle visitor screening and contact tracing on a permanent basis and that HTA should not be the organization that has to handle it. Mr. Tatum responded that the airports have said that they cannot use money from the airlines to fund those activities. He added that HTA wants to help how it can and is working with the Administration to see how these activities can be funded. Mr. Tatum said that HTA would not want to sustain this long term.

Chair Fried asked whether the state is obligated to utilize a portion of its CARES funding for COVID-19 testing by the end of the year. Rep. Onishi replied that the Department of Health has received CARES funding for contact tracing and to expand that program. \$36 million in CARES funding provided to the state has been allocated by the Legislature to purchase the equipment required for thermal screening at airports. Rep. Onishi added that processing

the data and the follow up ensuring people are complying with the 14-day quarantine should not be HTA's responsibility moving forward. He recommended that HTA has a conversation with whoever should be handling those activities. Chair Fried agreed with Rep. Onishi.

Mr. Regan recognized Ms. Chun to discuss the proposed budget for Tourism Research. Ms. Chun said that HTA is a data driven organization, but was able to identify savings in the budget. She noted that there was significant savings in Evaluation and Performance Studies because it is still unclear whether any events or gatherings will occur. She also noted that there is a significant savings in Marketing research which is nice to have, but not a necessity. Ms. Kimura asked whether the resident sentiment survey is included in the budget. Ms. Chun responded in the affirmative. Mr. Atkins asked whether the arrival survey forms have been modified for COVID-19, Ms. Chun responded those forms fall under the Crisis Management budget and not Tourism Research. Sherry Menor-McNamara asked about the response rate for the HTA arrival survey. Ms. Chun replied that the response rate is really high, with only 13% not submitting a response. During the crisis, the arrival survey, which is generally only distributed to domestic arrivals, was also distributed to international arrivals. Mr. Arakawa asked whether the HTA arrival survey is mandated by law. Ms. Chun responded that only the agricultural form is mandated by law. Mr. Arakawa then asked whether there is a compelling reason for the Legislature to make the arrival survey required. Rep. Onishi responded that he has been playing defense for the past two years on that matter because there have been initiatives to get rid of the tourism portion of the form. Mr. Regan added that the arrival survey is a tremendous resource for data and has been helpful for screening and contact tracing. He noted that the completion of two of the questions on the arrival survey including reason of stay and hotel accommodation information has been mandated. Ms. Menor-McNamara asked whether there is a way to modernize the HTA arrival survey and make it into a mobile app. Mr. Regan replied that there has been discussion and work is being done to turn the survey into a digitized form. Mr. Regan added that there is a scanning operation at the airport where the forms are scanned immediately and the data made available. Ms. Chun said that HTA is making daily press releases regarding the data. Mr. Tatum highlighted that HTA was not doing this previously but circumstances required moving the operation to the airport. He added that he wanted to support DOH, but does not anticipate funding this once the quarantine is lifted. Mr. Arakawa commended the scanning operation of the tourism forms. He then asked whether the process is manual. Ms. Chun responded in the affirmative and noted that work is being done to make the process electronic. Mr. Arakawa commented that the more the form is related to health and safety, the more likely it could be made mandatory, but noted the near 90% response rate.

Mr. Regan discussed the proposed budget for Administrative, which he noted are more or less fixed costs required to run the office and operate the organization.

Chair Fried announced a break in the meeting at 12:02 PM. The meeting reconvened at 12:13 PM.

Mr. Regan said that the \$5 million in the Tourism Emergency Fund, if approved by Gov. Ige, could be reallocated to the areas of concern raised by the Board. He noted that this is a discussion of the proposed budget and the vote on the FY 2021 budget would be at the next meeting. Mr. Tatum added that adjustments would be made based on the Board's feedback if the emergency funds were approved.

8. Update Relating to the 2020 Legislative Session and Related Bills Relevant to HTA:

Chair Fried noted that the Legislature is in recess and asked Rep. Onishi if the Legislature will reconvene on July 15th. Rep. Onishi responded in the affirmative. He said that he discussed with Mr. Tatum about which HTA-related bills require attention. Rep. Onishi said they did not identify any non-fiscal priority bill that needed to move forward.

Mr. Regan said that typically he would discuss the relevant bills. He noted that this has been an unusual session, and they will continue to monitor the situation moving forward. Mr. Regan highlighted that Gov. Ige's Eighth Supplemental Proclamation suspended TAT distributions, and the team will continue to monitor and provide information to the Board.

Mr. Arakawa said that, as part of the Working Group for Construction and Housing, he was tasked with creating a list of non-fiscal bills or initiatives that would facilitate economic recovery and asked HTA for its support in addressing this. Mr. Ka'anā'anā suggested the bill that amends the language for the Hawaiian Center of Music and Dance could be an option as it does not involve money and would allow them to issue an RFP and move forward with that program.

9. In Accordance with Hawai'i Revised Statutes (HRS) Section 201B-9 and 201B-10, the Hawai'i Tourism Authority Board Shall Discuss and Take Action on *Resolution 2020-1-3 Regarding the Visitor Industry, COVID-19* and that the Board has Determined that the Occurrence of an Outbreak of Disease is Adversely Affecting Hawai'i's Tourism Industry by Resulting in Substantial Interruption in the Commerce of the State and Adversely Affecting the Welfare of its People. The Resolution Shall Include a Request to the State of Hawai'i Governor David Y. Ige to Declare that a Tourism Emergency Exists:

Chair Fried recognized Mr. Regan to discuss the resolution. Mr. Regan said that by approving this resolution, it would commence the process required to access the \$5 million in emergency funds. Upon approval, HTA would draft a communication to Gov. Ige stating that the HTA Board has determined that a tourism emergency exists.

Chair Fried requested a motion to approve the resolution. George Kam made a motion, which was seconded by Mr. Rafter.

Mr. Atkins asked whether approval is required by the Legislature or only by Gov. Ige individually. Mr. Regan responded that by statute, Gov. Ige must declare that a tourism

emergency exists, and once that process is completed, HTA can access the emergency special fund. Mr. Atkins then asked whether the Marketing Committee will have any oversight over the emergency funds. Mr. Regan responded that the emergency funds are being allocated through the budget which requires Board approval and input on where the funds are utilized. Mr. Tatum added that any allocation of the emergency funds will be subject to the Board's approval of the budget at the next meeting. Mr. Atkins then asked whether the entire \$5 million should be allocated at this time or only be used to address the issues raised by the Board and maintain flexibility with the remaining money. Mr. Tatum responded that it would be a dynamic process with Board input and approval and is open to suggestions. Mr. Arakawa commented that he is in support of the flexibility to allow the HTA team to make quick decisions and take action as needed. He suggested that language be included to provide for prior notice to the Board and not prior approval because there may not be enough time to attain Board approval.

Mr. Arakawa made a motion to amend the resolution to include the language in paragraph 3 of the resolution as discussed above, which was seconded by Mr. Kam. The resolution as amended was unanimously approved by the Board via roll call.

10. In Accordance with the Hawai'i Tourism Authority's Operating Budget Policy, Policy #400- 500, the Board Shall Discuss and Take Action on *Resolution 2020-1-4 that Temporarily Suspends Section 6 and Section 7 of the Aforementioned Policy for a Period of 90 days from the Date of the Approval of the Resolution by the Board:*

Chair Fried recognized Mr. Regan to discuss the resolution. Mr. Regan explained that this resolution would temporarily suspend Section 6 and Section 7 of Policy #400-500 which would permit Mr. Tatum to reallocate funds of \$250,000 or more amongst the main categories without the Board's approval for 90 days. Mr. Tatum would be required to report any reallocations to the Board as he would normally do during Board meetings. Mr. Regan further explained that the purpose of the resolution to grant Mr. Tatum the authority to respond to the needs of the crisis as they arise without requiring a resolution by the Board.

Mr. Kam raised concerns about oversight and expressed that the Board's input is needed for important decisions to reallocate large funds and the consequences of those reallocations. He added that instead of giving the team carte blanche to reallocate funds and HTA should rely more on the expertise and input of the Board. Given the uncertainty, any reallocations need to be in line with the 5-year Strategic Plan and the four pillars. There needs to be a comprehensive plan to strategically implement the funds. Mr. Kam said that he is in support of releasing the emergency funds, but has reservations about reallocation of those funds without any oversight.

Chair Fried said that the resolution has reporting requirements where they are obligated to notify the Board within 30-days of the reallocation. He then added that he would like advance notice as provided in the previous resolution. Chair Fried noted if anything further like Board approval is required, then it largely defeats the purpose for the resolution. He

then highlighted that the suspension would only be for the duration of the COVID-19 crisis.

Mr. Atkins shared Mr. Kam's concerns and said that if collaboration has been the theme of the meeting, then this resolution would remove the collaboration of the Board in the process. Mr. Atkins commended Mr. Tatum for his handling of the crisis, but that input from the Board is needed now more than ever. He added that with Zoom there is no reason not to have an emergency Board meeting especially if it is so important. Mr. Atkins emphasized that taking the time to discuss and approve the proposed budget does not mean anything if funds can be reallocated at the whim of the HTA staff. Mr. Atkins stated that he would not vote for the resolution as is. He recommended either involving the Marketing Committee or raising the amount if \$250,000 is too low. Mr. Sanders responded that his suggestion would have been that anything over \$500,000 would require Board approval while still giving the team more flexibility. Mr. Atkins said that if the Board approves the budget as is, there are no specific programs. He expressed confidence that Mr. Tatum would be able to accomplish this, but Mr. Atkins then said that he attends the Board meetings to learn from the other members of the Board. He expressed concern about being shut out of the process for the next 90 days. Mr. Atkins noted that the Board did not discuss reopening at the meeting, which is a matter of major concern to him and his employees, and because it is not on the agenda, the Board cannot discuss it. He reemphasized that he would not vote for the resolution as is.

Mr. Arakawa asked Mr. Atkins and Mr. Kam whether they would approve the resolution if the reallocations required an emergency Board meeting. Mr. Atkins said that he would defer to Gregg Kinkley regarding the legality of an emergency Zoom Marketing Committee or Board meeting. He stated that he does not want to micromanage Mr. Tatum and the team and expressed that he has a lot of respect for each of the members for their efforts during these trying times. Mr. Atkins stressed that he supports Mr. Tatum and the team one hundred percent, but feels that the Board is not involved enough. Mr. Atkins added that success is needed more than ever because HTA only has one shot at reopening and one shot at bringing the community back together. He noted that because a second wave may of the virus may come in November, perhaps HTA should save some of the emergency funds, or instead develop a comprehensive plan for Rep. Onishi and Sen. Wakai requesting that more money be pumped into the tourism industry in three or four months' time.

Mr. Kinkley commented that there is a statutory provision for an emergency meeting, but the trigger for such a meeting requires the Board find "an imminent peril to the public health, safety, or welfare". He noted that it is a high bar and irrevocable damage to the state's economy may satisfy the trigger, but merely missing an opportunity if the Board does not move quickly would fall short.

Mr. Kam asked whether there is a limit to the number of Board meetings and whether it just requires 6-days' notice. Mr. Kinkley responded that there is no limit to the number of Board meetings. Mr. Kam said that from a timeline standpoint if there needed to be a Board meeting to approve something, it could be accomplished within a 6-day window. Mr.

Kinkley added it would be the same for a Marketing Committee meeting.

Mr. Rafter asked how long Zoom remains a viable option to host meetings. Mr. Kinkley responded that it would likely be a direct consequence of the most recent emergency proclamation by Gov. Ige. Once that is lifted, Mr. Kinkley assumes that the Board would have to resume in-person meetings. He added that should the Legislature find reason to intervene to permit the continuance of Zoom meetings, the Legislature could intervene.

Mr. Atkins asked to confirm that as a Board member he can talk to one Board member, but not more than one on the same issue. He then asked if this also applies to Mr. Tatum and if Mr. Tatum can talk to several Board members to get a consensus. Mr. Kinkley responded that Mr. Tatum as a staff member is not subject to the Sunshine Law and can communicate with more than one Board member at a time, but cannot do so to attain some form of consensus. Mr. Arakawa asked whether Mr. Tatum can speak with multiple Board members to get comments on an issue, to which Mr. Kinkley responded in the affirmative. Mr. Kinkley added that it would be better if any such conversations took place over individual emails to the Board members.

Mr. Chun asked if the stipulation included in the previous resolution requiring prior notice but not approval to complete the action would satisfy the concerns with this resolution. Mr. Arakawa expressed his belief that Mr. Atkins and Mr. Kam would like interaction and discourse amongst the Board. Mr. Atkins agreed that he would like the collaboration. Mr. Kam added that with all this uncertainty the next 90 days are the most critical and HTA needs the full engagement of the Board to help navigate these treacherous waters. He added that all previous plans have changed and giving the HTA team the full flexibility to unilaterally reallocate funds takes away from the process of seeing how HTA can best utilize those limited funds. Mr. Kam emphasized that he does not want to hinder HTA's performance, but rather wants to be a partner working through these unprecedented times.

Mr. Sanders asked Mr. Kam how he felt about raising the level from \$250,000 to \$500,000 and giving the HTA team more flexibility. Mr. Kam responded that moving \$500,000 from Community would basically wipe out a whole program HTA may want to invest in, and even \$250,000 would represent a significant portion. He added that based on the comments by the Board, HTA needs to reassess to ensure that spending is aligned with the 5-year Strategic Plan. Mr. Kam noted that he feels that the proposed budget is underweighted in the areas he feels are important like Hawaiian Culture, but at the same time, the lack of any specific programs does not show how the money is going to be spent. He then said that he would support giving the flexibility to move funds within a main category, but would be hesitant to allow money to be pulled from Community for something else. Mr. Kam emphasized that there needs to be more transparency. He said that he felt that \$250,000 was an appropriate number, but any higher is the equivalent of an entire line item in the proposed budget. He added that he does not know the right answer, but based on the comments of the other members he wanted to raise these issues for discussion. Mr. Atkins

noted that he has told the Board how he will vote, but he will respect and support the other members' votes if the resolution is approved by majority. Ms. Yuen expressed that she shares Mr. Atkins' and Mr. Kam's concerns especially given the unprecedented times and that the budget is very limited. She added that transparency will help publicly because it will show what HTA is going to do in this situation.

Chair Fried asked Mr. Tatum if the team could wait until the next Board meeting or at least 6 days to approve any reallocations. Mr. Tatum responded in the affirmative. Chair Fried said that the resolution will be amended to read that any reallocation over \$250,000 will require Board approval. Mr. Regan noted the policy that would be suspended already includes that language. Chair Fried and Mr. Kinkley agreed that the resolution would be moot at this point because the language is already included in the operating policy. Mr. Kinkley added that perhaps the reasons giving rise to the extraordinary powers in the resolution may give cause to hold emergency meetings over Zoom. Mr. Rafter responded that this is a fluid situation, the Board has a staff in place for a reason, and the HTA team may be held up because the Board could not attain quorum. Mr. Atkins suggested that perhaps Mr. Tatum would be permitted to proceed with an action requiring Board action if the Board cannot attain quorum for an emergency meeting. Mr. Kinkley cautioned about taking that approach. Mr. Rafter said that because they currently have the ability to hold Zoom meetings, they can revisit this issue in two or three months based on the current conditions. Mr. Arakawa agreed with Mr. Rafter. Mr. Kam added that perhaps down the road, these matters could be approved by the Marketing Committee, which is smaller in number.

Chair Fried tabled the resolution to be held in abeyance until a later date.

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

Chair Fried recognized Mr. Sanders to report on the Marketing Committee meeting. He commended Mr. Tatum and the HTA team for their response to the COVID-19 emergency. Mr. Sanders said that Jay Talwar, HVCB Senior Vice President of Marketing, updated the Committee on HVCB's work assisting visitors and sharing information about the 14-day quarantine. Mr. Sanders then discussed the success of the "Share Aloha" campaign. He highlighted that there were five speakers who discussed the impact of COVID-19, including Ms. Menor-McNamara, President and CEO of the Hawai'i Chamber of Commerce, who represented small businesses, John Morgan, President and Owner of Kualoa Ranch, who represented activities, Avi Mannis, Senior Vice President of Marketing for Hawaiian Airlines, who represented the airline industry, Tina Yamaki, President of the Retail Merchants of Hawai'i, who represented the retail industry, Mufi Hannemann, President of HLTA, who represented the hotel industry. Mr. Sanders said that the committee discussed the impact of the lack of TAT funding on the FY 2021 budget. He noted that the committee identified the importance of setting a specific date to reopen the visitor industry to allow businesses

to plan around that date.

Ms. Kumukahi requested that the Board adopt the 'Aina Aloha Economic Futures Declaration, which is supported by over 600 individuals and companies, as a resolution at the next Board meeting. Mr. Ka'anā'anā shared his involvement with the declaration and noted that it aligns seamlessly with HTA's four pillars. Ms. Yuen also shared her support noting that these initiatives can bolster local communities, businesses, and entrepreneurs.

Rep. Onishi provided an update about the bill related to the Hawaiian Center for Music and Dance. The committee did not file a committee report and as a result, the bill has died.

12. Adjournment

The meeting adjourned at 1:22 PM.

Respectfully submitted,



Reyn S.P. Ono
Recorder

4

Report of the CEO Relating to Staff's Implementation of HTA's Programs During May 2020



MEMORANDUM

TO: HTA Board of Directors

FROM: Chris Tatum, President and CEO

DATE: June 25, 2020

RE: Report of the CEO

The following narrative utilizes the Hawai'i Tourism Authority's (HTA) 2025 Tourism Strategic Plan and its four pillars (Natural Resources, Hawaiian Culture, Community, and Brand Marketing), in addition to Tourism Research, to outline the various matters the staff is currently working on or has completed since the last CEO Report dated May 28, 2020. The narrative also describes the actions conducted by the staff to implement the HTA budget previously approved by the Board.

I. NATURAL RESOURCES PILLAR

1. Aloha 'Āina (Natural Resources) Program

HTA program staff are working to issue supplemental contracts to reduce the overall value of each award by 50% as HTA responds to the budget impacts caused by COVID-19. Staff conducted group and individual Zoom calls with each of the awardees to explain the situation as well as work on a revised scope of work and key performance indicators for the remainder of the year.

2. DLNR Partnership

HTA staff continues to work in partnership with DLNR to identify potential projects for FY21 that work to protect Hawai'i's natural and cultural resources on state lands through various initiatives underway. HTA staff is also working on the final closeout of the current MOA with DLNR.

3. Hawai'i State Park Survey

HTA's contracting staff is working to finalize the draft request for proposals (RFPs). The project is expected to survey all state parks over a one-year period. The data and insights collected by the survey will help HTA and DLNR manage resources better to protect natural and cultural assets. HTA staff is awaiting the Uber media project's first data set to assess where gaps in the data exist. Based on this information, the park survey RFP will be adjusted to ensure maximum coverage for future data collection.

4. Sustainable Tourism Association of Hawai'i

The Sustainable Tourism Association of Hawai'i (STAH), formerly known as the Hawai'i Ecotourism Association, is continuing to make progress with the implementation of Sustainable Tourism Programs: 1) Certified Sustainable Tour Operator Program, 2) Tour Operator/Tour Guide Training Program, and 3) Sustainable Travel Education & Outreach Program. HTA staff is working with STAH to implement new digital versions of their in-person workshops and other activities due to the COVID-19 pandemic.

5. Hawai'i Green Business Program

The Hawai'i Green Business Program's primary focus of work is to assist and recognize businesses that strive to operate in an environmentally, culturally and socially responsible manner. The program has a proven record of reducing energy consumption, water savings and waste diversion, which are three key metrics in HTA's strategic plan. The program's recognition ceremony has been postponed due to the COVID-19 pandemic and HTA staff and the contractor's staff are working to determine what the next steps are to complete the scope of work before the contract expires at the end of June 2020.

II. HAWAIIAN CULTURE PILLAR

1. Kūkulu Ola Program

HTA program staff are working to issue supplemental contracts to reduce the overall value of each award by 50% as HTA responds to the budget impacts caused by COVID-19. Staff conducted group and individual Zoom calls with each of the awardees to explain the situation as well as work on a revised scope of work and key performance indicators for the remainder of the year.

2. Native Hawaiian Hospitality Association

HTA and the Native Hawaiian Hospitality Association (NaHHA) continue to build stronger ties between the Hawaiian community and the tourism industry. As a result of the COVID-19 pandemic HTA requested that all in-person trainings and workshops be postponed or cancelled. Shortly after that request was made, NaHHA developed a process to conduct limited trainings online. HTA staff has finalized a workplan for the 2020-2021

3. Native Hawaiian Festivals and Events

13th Festival of the Pacific Arts & Culture (FESTPAC)

Event organizers for the 13th Festival of the Pacific Arts & Culture (FESTPAC) announced on March 2, 2020 that the international event would be postponed due to growing global concerns over the COVID-19 outbreak. Hawai'i was to host FESTPAC 2020 for eleven days in June 2020. FESTPAC was rescheduled for June 18-27, 2021. As the pandemic evolves the FESTPAC commission is seeking guidance from the Secretariat of the Pacific Community regarding whether the festival will be postponed or possibly moved to 2024.

4. Kāhea Program

Harbors

As of March 6, 2020, the statewide Kāhea Harbor Greeting Program for calendar year 2020 has been suspended due to the recent COVID-19 global outbreak. Ports include Nāwiliwili, Lahaina, Hilo and Kona. Work suspended includes, but is not limited to, hula, mele, lei making, distribution of maps and other collateral, as well as lei greeting with fresh flower lei. HTA staff continues to assess the program as the situation evolves.

Airports

The Kāhea Airports Greeting Program has also been suspended due to the recent COVID-19 global outbreak. Work suspended includes, but is not limited to, hula, mele, lei making, distribution of maps and other collateral, as well as lei greeting with fresh flower lei. HTA staff will continue to assess the program as the situation evolves.

5. Resort Area Hawaiian Culture Initiative

HTA staff is currently processing year-end reports for the 2019 contracts. All 2020 activities have been suspended due to the pandemic. Resort areas included in this program include Waikīkī, Hilo, Lahaina and Kailua-Kona.

6. Hawai'i Investment Ready 2019 Cohort

The HTA and Hawai'i Investment Ready (HIR) contract supports a cohort of social enterprises with a tourism focus, all which previously received funding through the Community Enrichment, Kūkulu Ola or Aloha 'Āina programs. The intent is to elevate these social enterprises to seek other forms of capital to enhance and improve its programs. HIR has completed Modules 1-6 and will be implementing Module 7 in March 2020. HIR is now working to prepare for their post-cohort mentoring for April-December 2020.

7. Center for Hawaiian Music and Dance

This legislative session HTA tracked HB 1622 HD1 which amended language that allowed for the development and operations of the Center for Hawaiian Music and Dance. Due to the unanticipated closing of the Legislature due to COVID-19, the bill never made it out of committee and is effectively dead for this session.

8. 'Ōlelo Hawai'i

HTA contract staff has finalized the contract with Bishop Museum for the project "He Aupuni Palapala: Preserving and Digitizing the Hawaiian Language Newspapers." The goal of this project is to digitize all Hawaiian language newspapers (in all repositories and personal collections). The State of Hawai'i benefits to support programs that preserve and increase access to rare and historical Hawaiian language newspapers to further the understanding and knowledge contained therein. By making readily available these important documents for education, research, and preservation, the project will provide the state with a completely unique and robust resource for Hawaiian language learners and workers to strengthen 'ōlelo Hawai'i.

III. **COMMUNITY PILLAR**

1. Community Enrichment

Community Enrichment Program (CEP)

As mentioned in the May 2020 CEO report, HTA staff had to terminate approximately 65 CEP contracts. Staff have been busy reviewing, processing and closing out approximately 70 contracts for 2019 and 2020. Of the 92 CEP-awarded projects, five projects were completed in Q1 2020 (Pow! Wow! Hawai'i (O'ahu), E Kanikapila Ka Kou (Kaua'i), Waimea Town Celebration (Kaua'i), Ka Moku O Manokalanipō Pā'ani Makahiki (Kaua'i), and Maui Whale Festival (Maui)).

Eight events and two projects will be completed by the end of 2020. The eight events that HTA continued to fund were ranked in the top three by the CEP Evaluation Committees. These projects are especially meaningful and can uplift the community during these difficult times. They can also be enjoyed by potential visitors. All but one of these events will be virtual events. The events are: Kona Coffee Cultural Festival (Hawai'i Island), Ka'ū Coffee Festival (Hawai'i Island), Slack Key Guitar Festival (Hawai'i Island, O'ahu and Kaua'i), Gabby Pahinui Waimānalo Kanikapila & The Aloha Shirt Festival (O'ahu and Hawai'i Island), Okinawan Festival Virtual Experience (O'ahu), 'Ukulele Festival (O'ahu), Hawai'i Food & Wine Festival (O'ahu, Hawai'i Island and Maui), and Kōloa Plantation Days (Kaua'i). The two projects near completion are the Lāna'i Guide App Enhancements and Haleiwa Interpretative Signage Project and Walking Tour Map.

Hawai'i Agritourism Initiative

HTA's Agritourism Educational Workshops with the University of Hawai'i's College of Tropical Agricultural & Human Resources – Go Farm Hawai'i, Hawai'i Agritourism Association and O'ahu Resource Conservation & Development Council (ORCD) have been postponed until late July and early August 2020. These educational workshops are geared towards farms that are interested in getting into agritourism or those already in it and want to expand. The workshops will now be held virtually via Zoom and free-of-charge. Staff is currently working with Go Farm Hawai'i and Hawai'i Agritourism Association on the format and timing of the webinars.

2. Communication and Outreach: May 2020

News Releases/Reports Issued

- Daily News Release: Hawai'i Passenger Arrivals by Air (May 1-31)
- Report: HTA Hawai'i Vacation Rental Performance Report for March 2020 (May 12)
- Report: HTA Hawai'i Hotel Performance Report for April 2020 (May 26)
- Report: HTA Hawai'i Vacation Rental Performance Report for April 2020 (May 27)
- News Release: Hawai'i Visitor Statistics Released for April 2020 (May 28)

Media Relations – COVID-19

- Honolulu Civil Beat: Responded to an email from reporter Denby Fawcett requesting an interview with Chris Tatum (CT) on marketing efforts when things reopen, to get residents to welcome tourists back with aloha. CT did the interview on May 2 following direction from Alan Oshima's Economic & Community Recovery Navigator committee and Mike McCartney of DBEDT. (May 1)
- KHON: Responded to an email from the Joint Information Center (JIC) regarding an inquiry from reporter Nikki Schenfeld asking who is following up with interisland travelers. Advised them that HTA is not involved in that particular process. (May 1)
- Hawai'i Business Magazine: Responded to an inquiry from reporter Bev Creamer requesting an interview with CT. Set up a tentative time for an interview. (May 1)
- KZOO: Responded to an email from producer Mona Wood requesting an interview with CT for their KZOO Aloha Friday Show. Eric Takahata of Hawai'i Tourism Japan did the interview. (May 2)
- Bloomberg: Responded to an email from reporter Jen Murphy asking how many people are employed in Hawai'i's hospitality industry. Referred her to the HTA Strategic Plan online for the economic impact of tourism. (May 3)
- Hawai'i Business Magazine: Provided reporter Bev Creamer a response to written questions since CT wasn't available for a phone interview. (May 4)
- Hawai'i News Now: Responded to an inquiry from reporter Casey Lund asking for live morning interviews on May 5 regarding visitor arrivals, how visitors are being monitored and what HTA's goals are. CT declined the opportunity. (May 4)
- Honolulu Star-Advertiser: Responded to a request by Kira Dilonno to have CT participate in its COVID-19 Care Conversation Facebook Live to talk about tourism in Hawai'i, how we get it back, and how it will be different. CT declined the opportunity. (May 4)
- KHON: Responded to an inquiry from reporter Sara Mattison following up on the Senate hearing, asking if HTA implemented any of the suggestions from the senators relating to the 14-day self-quarantine, specifically if homeowners were being called to verify their addresses. Advised her that quarantined residents were being called since April 24 by Hawai'i Department of Transportation (DOT) workers, and that they have also been checking the property tax records since April 23. Also advised her to check with HI-EMA for further information. (May 4)

- Lonely Planet: Responded to an inquiry from journalist James Gabriel Martin asking about Hawai'i's plan for tourism in the future that suits visitors, locals and the environment. Connected James with Kalani Ka'anā'anā (KK), who did the interview with him. (May 5)
- The New York Times: Responded to an inquiry from reporter Lauren Sloss asking about Hawai'i's current status and future plans for reopening. Sent her the link to HTA's website with the links to the emergency orders, along with the link to HTA's Strategic Plan which details the economic impact of tourism. (May 5)
- Honolulu Star-Advertiser: Responded to an inquiry from reporter Allison Schaefer asking about the quarantine, and if people arrive on May 29 if they have to quarantine until May 31 or for 14 days. Advised her they would have to quarantine for 14 days. (May 6)
- KHON: Responded to an inquiry from reporter Max Rodriguez asking for a CT interview about getting travelers tested for COVID-19 before they get on a flight to Hawai'i. He also asked about the Safe Travels app. CT deferred to the Recovery Navigator and Department of Health (DOH), as well as the Department of Taxation for the app. (May 6)
- Associated Press: Responded to an inquiry from reporter Jennifer Kelleher asking about current hotel bookings. Sent her the link to the hotel performance report published the week prior. (May 6)
- The New York Times: Responded to a follow-up inquiry from reporter Lauren Sloss asking about the reopening process. Advised her that those decisions are being worked on by the recovery committee headed by Alan Oshima, and sent her the link to the press release. (May 6)
- eTurbo News: Responded to a request to join a Zoom meeting on rebuilding travel, which Frank Haas was confirmed to participate in. Advised him that CT declined, and that Haas was a part of the team that worked on the HTA Strategic Plan, and sent him the link. (May 6)
- Ka Wai Ola (OHA's newspaper): Responded to an email from freelance writer Ed Kalama regarding visitor statistics throughout the years, and he requested to be put in touch with KK. Sent him the links on HTA's website and looped in KK. (May 6)
- Hawai'i News Now: Responded to questions from executive producer Josh Meeks regarding the passenger arrivals press release, and how many calls HVCB/HTA have been making to the quarantined visitors. Told him 18,400 calls thus far. Also explained why some of the people leave the questionnaire blank. (May 6)
- The New York Times: Responded to a follow-up question from reporter Lauren Sloss asking about the Governor's proclamation and the businesses that are allowed to reopen. (May 7)
- Honolulu Civil Beat: Responded to email from Kaua'i columnist Allan Paranchini asking how to be on HTA's distribution list. (May 8)
- Hawai'i News Now: Responded to an inquiry from reporter Lynn Kawano asking about the practice of hotels not providing a room key to those under quarantine. Sent her the letter Mufi Hannemann (MH) of HLTA sent to the hotels that are currently open, and that HLTA is contacting those hotels to follow up with them. (May 8)

- CNN.com: Provided talking points to the JIC regarding an email from correspondent Josh Campbell asking about the quarantine policy. Told them it's a multi-agency coordinated effort and gave links to details about the quarantine and process. Told them the Attorney General and police departments could speak about the enforcement. (May 8)
- KITV: Responded to an email from reporter TJ Horgan asking about testing visitors. Advised him to reach out to DOH and the Attorney General's office instead. (May 8)
- Bloomberg News: Responded to an inquiry from reporter Ari Natter asking how many tourists are still coming to Hawai'i. Sent him the link to the press release, and explained who is classified as a "visitor." (May 8)
- KHON: Responded to an email from reporter Kimberlee Speakman asking why the passenger count is increasing. Told her it's been waxing and waning over the course of the quarantine period, and that it's significantly lower than the number of passengers who would normally come to visit Hawai'i. (May 8)
- USA TODAY: Responded to an email from Christina Silva asking about Hawai'i's unemployment numbers. Sent her the links to HTA's visitor statistics and research information. (May 9)
- Hawai'i Public Radio: Responded to an email from reporter Ryan Finnerty asking for a CT interview about the tourism industry and how it will move toward recovery. Advised him to reach out to Alan Oshima instead. (May 10)
- CNN Travel: Responded to an inquiry from senior editor Stacey Lastoe asking about the quarantine and the restrictions once someone is finished quarantining. (May 11)
- Bloomberg News: Responded to a follow-up email from reporter Ari Natter asking about the single-use key card. Sent him the letter MH sent to the hotels that are open. (May 12)
- Associated Press: Responded to an email from Jennifer Kelleher regarding the single-use key card. Sent her the letter MH sent to the hotels that are open, and the link to the Senate's special committee website. (May 12)
- Realtor.com: Responded to an inquiry from freelance writer Tiffani Sherman who was writing an article about the effect COVID-19 is having on Hawai'i's real estate market and the economy. Sent her links and suggested she reach out to DBEDT. (May 12)
- KHON: Responded to an inquiry from reporter Kimberlee Speakman asking about airport screening and the single-use hotel key program. Advised her to check with DOT regarding procedures at the airport, sent her MH's letter, and the link to the Senate's special committee website. (May 12)
- KITV: Responded to an email from executive producer Cherry Pascual asking if CT would do a live interview for their 6:30pm newscast on May 15. CT declined. (May 12)
- KUMU: Responded to an email from news director Esme Infante asking for CT to be part of their KUMU Kōkua segment on Monday at 8am. CT agreed, but Infante decided to postpone the interview. (May 12)
- Associated Press: Responded to follow up questions from reporter Jennifer Kelleher regarding the single-use room key initiative. (May 13)

- Hawai'i News Now: Responded to an inquiry from managing editor Daryl Huff asking if HTA has historic daily arrival data. Told him that HTA hasn't been collecting daily passenger data prior to the quarantine and that DBEDT has the historic data, however, there's a difference in methodology. (May 13)
- KUMU: Spoke with news director Esme Infante regarding background information on the tourism numbers, and links to the data. (May 13)
- KITV: Responded to an inquiry from reporter Eddie Dowd regarding the single-use card program at hotels. Sent him the letter MH sent to the open hotels, and the link to the Senate special committee's website which has information submitted by HTA. (May 13)
- Fuji TV Japan: Pattie Herman (PH) participated in an interview with the DOT for a series of stories on Hawai'i since a survey found that Hawai'i was the top destination Japanese people want to visit. Coordinated through DOT. (May 13)
- 'Ōlelo Community Media: Forwarded CT an invitation from production services coordinator Jo-Lynn Domingo to appear on Island Focus on May 23. (May 14)
- Bloomberg News: Responded to a follow-up email from reporter Ari Natter regarding the one-time key card program. Sent him the link to the Senate special committee's website for the list of hotels contacted. (May 15)
- Hawai'i News Now: Responded to an inquiry from digital executive producer Ian Schuering asking when HTA started compiling the data. Sent him to HTA's alerts page to see the archived press releases. (May 15)
- KHON: Responded to an email from digital content producer Agatha Danglapin asking about the new tables for the press release. (May 17)
- Hawai'i News Now: Responded to an email from assignment manager Brenda Salgado asking why there are now different categories in the daily passenger count press release. Told her the DOT started using a new form, and HTA is using that to collect the data instead. (May 18)
- eTurbo News: Responded to an email from reporter Juergen Steinmetz asking questions directed to the Governor. Told him to contact the Governor's communications office instead. (May 18)
- The Washington Post: Responded to an inquiry from reporter Hannah Sampson asking about travel to Hawai'i and the quarantine. Told her to watch Gov. Ige's press conference currently going on. (May 18)
- The Washington Post: Responded to a follow-up email from Hannah Sampson asking how important it is for people to stay away from Hawai'i and also how many people have been sent back home. Told her it's important for people to follow the Governor's order, and also suggested she contact the Visitor Aloha Society of Hawai'i (VASH). (May 19)
- Honolulu Star-Advertiser: Responded to an email from reporter Allison Schaefer asking why there are more categories for passenger arrivals. Explained that HTA is using data from a new DOT form that has additional categories. (May 19)
- NBC Bay Area News: Responded to an email from Marianne Favro asking about the end date for the quarantine. Explained the situation. (May 20)

- KHON: Responded to an email from research director Trina Iwamuro regarding kama'āina specials. (May 20)
- Honolulu Civil Beat: Responded to an inquiry from reporter Stewart Yerton regarding the cost of keeping hotels open without visitors, and safety guidelines. Suggested he contact the hotels directly and also HLTA which is working on guidelines for hotels. CT also suggested he contact Jerry Gibson from Turtle Bay Resort. (May 20)
- The Wall Street Journal: Responded to inquiry from reporter Alejandro Lazo asking if Hawai'i is paying for and running ads asking visitors not to vacation in Hawai'i. Sent him the links to the HVCB letter to travel media and the Share Aloha social media video. (May 20)
- The Wall Street Journal: Responded to a follow-up email from reporter Alejandro Lazo, this time requesting an interview about efforts to discourage travel to Hawai'i. CT declined. (May 20)
- KITV: Responded to an email from producer Victoria Cuba asking for a copy of the new declaration form. Advised her to check with the DOT as it was created by them. (May 20)
- KITV: Responded to an email from news producer Hannah Palaniuk asking for the May 19 passenger arrival data. Sent her the press release. (May 20)
- KITV: Responded to producer Cherry Pascual asking if CT wants to do a live interview on May 22 at 6:30pm. CT declined. (May 21)
- PBS Hawai'i: Responded to an inquiry from producer Joy Chong-Stannard of PBS Insights asking for CT to be on their upcoming panel on tourism. CT declined the opportunity. (May 22)
- KITV: Responded to an inquiry from producer Allison Valdez asking for CT to be on Good Morning Hawai'i to talk about travel and tourism, and reviving the economy. Declined at this time with the board meeting approaching and advised that there's a state committee in charge of reviving the economy – the Recovery Navigator. (May 26)
- KITV: Responded to an inquiry from reporter Annalisa Burgos asking if any property owners requested quarantine exemptions for illegal vacation rentals. Advised her that the exemptions are for people and not properties. (May 26)
- The Maui News: Responded to an email from editor and reporter Lee Imada regarding the Hawai'i Hotel Performance Report, asking if all hotels in Wailea are closed and what "other Maui County" means. Advised him that the majority of hotels in Wailea are closed and provided the GoHawaii.com link, and that "other" refers to the other parts of Maui County that are not listed. (May 26)
- Honolulu Civil Beat: Responded to an email from reporter Yoohyun Jung regarding the visitor arrivals. Sent her links to previous information and told her the new press release will be issued tomorrow morning. Also advised her to see DBEDT's website for historical daily passenger count data. (May 27)
- Honolulu Magazine: Responded to an email from freelance writer Michelle Broder Van Dyke regarding HTA's plans for reopening tourism. Advised her to tune in to HTA's board meeting and suggested she reach out to the various organizations such as HLTA, the airlines, A3H, and DBEDT for the economic forecast. (May 28)

- Hawai'i Public Radio: Responded to an email from reporter Casey Harlow asking if CT would do an interview regarding reopening interisland travel and HTA's preparations for the reopening of tourism. Advised him to tune in to HTA's board meeting. (May 28)
- Pacific Business News: Responded to an email from reporter Christina O'Connor asking why the spending data for the April visitor report was not available. Advised her there was not enough data because there were so few tourists that month due to the quarantine. Also advised her to tune in to HTA's board meeting. (May 28)
- Cruise Critic: Responded to an email from managing editor Chris Gray Faust about DBEDT's press release regarding the economic forecast for the cruise industry. Suggested he reach out to DBEDT instead. (May 28)
- The Maui News: Responded to an inquiry from Kehaulani Cerizo asking why the numbers from the daily passenger arrivals press releases don't match the total count listed in the April 2020 visitor statistics press release. Advised her that the numbers sometimes get adjusted days later after more information about the passengers is received during the follow-up calls, and some get reassigned to a different category. (May 29)

Community Initiatives and Public Outreach

- Started a Facebook Watch Party for Hawaiian Airlines' May Day Event, which HTA sponsored. (May 1)
- Responded to an email from Andrea Rodriguez, a wedding planner on Maui, about creating a free wedding event giveaway and asking HTA to participate. Advised her that HTA is not marketing at this time, and that the budget has been reduced because of reduced Transient Accommodations Tax (TAT) collections. (May 4)
- Responded to an email from Daniel Logtenberg of the Sustainable Tourism Association of Hawai'i asking for documents showing that HTA supports his nonprofit. Connected him with KK and Dede Howa (DH), who manage his contract. (May 4)
- Distributed e-blast to HTA's distribution list in partnership with Hawai'i Green Growth regarding its COVID-19 survey on strategies for recovery. (May 6)
- Responded to sales pitch from Gabriel Photography, but declined his offer at this time. (May 6)
- Gov. Ige's office: Responded to an email forwarded by Michelle Yamashita, regarding an email asking Gov. Ige for an autographed photo of him. Advised her that HTA doesn't handle such a request. (May 7)
- Responded to sales pitch from Timothy Taylor asking if HTA wants his help with Japanese subtitles. Declined his offer. (May 8)
- Responded to email from Lauren Chiang, who is starting a new business in Hawai'i called Actif Destinations, asking for photos to use. Sent her the link to Barberstock. (May 12)
- Provided Hawai'i media list for the television news stations to Ikaika Rogerson of the Moloka'i Hoe which was planning on distributing a news release. The Moloka'i Hoe is sponsored by Hawai'i Tourism. (May 13)
- Responded to an email from Seth Schultz of United Airlines asking to be on HTA's distribution list. Told him how to sign up. (May 14)

- Responded to a sales pitch from Michael Mamian of Global Munchkins, which has a blog. Declined the offer. (May 14)
- Responded to a sales pitch from Anthony Moorhouse of Tour and Take in. Declined the offer. (May 14)
- Responded to an email from Jeremy Finley, a novelist in Tennessee asking for expert advice on the Hawaiian language and boat tourism. Connected him with KK, who connected him with NaHHA. (May 18)
- Responded to a sales pitch from Anne-Julie Karcher, project manager of ClarkInfluence, asking to chat. Declined offer. (May 21)
- Responded to an email from Peter Boylan of Par Hawai'i, asking to be on HTA's distribution list. Told him how to sign up and to let others know as well. (May 22)
- Responded to a sales pitch from Ally St. Laurent asking if HTA wants to participate in LinkedIn's Learning Solutions. Declined the offer. (May 22)
- Responded to a sales pitch from Wendy of Kayton Travel in Canada. Advised her that HTA is not interested at this time. (May 27)

Crisis Communications – COVID-19

- Updated the HTA website daily regarding COVID-19 updates from HTA, DOH, the Governor's office, counties, CDC, and other official government sites. (May 1-31)
- Sent updates on the COVID-19 situation to a growing list of people including HTA staff, HTA board members, lawmakers, GMTs, Hawai'i's congressional delegation, county officials, visitor industry leaders and others. Updates #416 - #579. (May 1-31)
- Wrote HTA's daily passenger count press releases using data provided by Jennifer Chun (JC). Sent the releases and links to the JIC, Dan Dennison, Krystal Kawabata, Tim Sakahara, Cindy McMillan, and Charlene Chan. (May 1-31)
- Participated in a daily Joint Information Center (JIC) call.
- Visitor Inquiries
 - Responded to an email from Pamela Boudreau of Texas, asking if they should still come on their vacation on June 2. Told her about the quarantine and that it could be extended. Suggested she check HTA's website for updates. (May 2)
 - Responded to an email from Richard Gilstrap, asking if they should still come on their vacation on June 6. Told him about the quarantine and that it could be extended. Suggested he check HTA's website for updates. (May 2)
 - Responded to an email from Kathleen Gilfillan asking about their upcoming trip in October. Told her the situation is fluid, so we don't know what the future holds then, and to check HTA's website for updates. (May 3)
 - Responded to an email from future visitor Yatindra Singh asking about the quarantine. (May 4)

- Responded to an email from Stacey Engstrom asking about the quarantine and if they should still come to visit in June. Referred her to HTA's website for updates. (May 6)
- Responded to an email from Andy Green asking if he has to quarantine if he arrives on May 28. (May 6)
- Responded to an email from Tim Nielsen asking about his upcoming trip. Sent him the link to HTA's website regarding the quarantine and told him the situation is fluid so he should check for updates. (May 6)
- Responded to an email from future visitor Karen Frenchak asking if they should reschedule their trip planned for June 17. Told her that the quarantine goes through May 31 but could be extended, and to check HTA's website for updates. (May 6)
- Responded to an email from Dan Johnston asking if he travels to Hawai'i on May 30 if he will have to quarantine. Told him he would have to self-quarantine under the current order, and that the situation is fluid so he should check HTA's website for updates. (May 7)
- Responded to an email from Jason Paul asking what Hawai'i will be like in July. Told him it's a fluid situation and we don't know yet if the Governor will extend the quarantine into July so to keep checking HTA's website for updates. (May 7)
- Responded to an email from Erik Borges of Washington asking when the quarantine will be lifted because his family wants to come visit. Told him it's a fluid situation, and that the Governor could extend the quarantine again, so to keep checking HTA's website for updates. (May 7)
- Responded to an email from Paul Green, who has a trip planned for Kaua'i this summer. Told him it's a fluid situation, and that the Governor could extend the quarantine again, so to keep checking HTA's website for updates. (May 7)
- Responded to a Facebook message from Nicholas Johnson asking if they should cancel their reservations for August. Told him that we don't know what it'll be like then. (May 7)
- Responded to an email from Steve Mangan, asking what Hawai'i will be like in August since they have a trip planned. Told him it's a fluid situation and to keep checking HTA's website for updates. (May 8)
- Responded to an email from David Clark, a longtime visitor, complaining about the quarantine, and saying he will never come back to Hawai'i. (May 8)
- Responded to a call from Lia Sotebarg, whose brother on O'ahu was recently hospitalized and recovering at home, and hasn't received a response after emailing for an exemption. Advised her to continue following up by emailing the exemption address. (May 8)
- Responded to an email from Maria Campbell asking what Hawai'i will be like in June since they have a trip planned. Told her it's a fluid situation and to keep checking HTA's website for updates on the quarantine. (May 9)

- Responded to an email from G.M. asking about a flight from Canada and if he can transit or if he has to quarantine before flying on to Tahiti. Told him he won't have to quarantine if he doesn't leave the airport in Hawai'i. (May 10)
- Responded to an email from Argyll Binguik asking what Hawai'i will be like in June since they have a trip planned and she's assuming the quarantine will be lifted at the end of May. Told her it's a fluid situation and that Gov. Ige could extend it again, and to keep checking HTA's website for updates on the quarantine. (May 10)
- Responded to an email from Alex Thompson asking about his upcoming vacation in June and that he plans on renting a car, and further asked if they can break the quarantine to watch a fireworks show. Told him that if he's under quarantine he is not allowed to leave his place of lodging, and to check HTA's website for updates regarding the quarantine order. (May 10)
- Responded to an email from Kathy Brophy asking if she can come to Maui on vacation in June. Told her the situation is fluid and we're not sure if the quarantine will be extended again, and to keep checking HTA's website for updates. (May 11)
- Responded to an email from Neal Dofelmier asking if he has to quarantine if he comes on May 29. Told him under the current order he will have to and that the Governor could extend the quarantine order as well. (May 11)
- Responded to a Facebook comment from Terri Ramsey of Arkansas asking when the quarantine will be lifted. Gave her the update and the link to HTA's website for further updates. (May 12)
- Responded to an email from Shirley Gilchrist asking about her upcoming trip in July, as well as for reassurance that she will not have a problem enjoying her stay. Told her that the situation is fluid and to check HTA's website for updates. (May 13)
- Responded to an email from Rich Austin of Arizona asking how he can find out if the quarantine will be lifted by July. Told him to check HTA's website for updates. (May 14)
- Responded to an email complaint from David Reiner who says he will never visit Hawai'i again because he doesn't agree with the quarantine order, and that he's unable to get a park permit. (May 14)
- Responded to an email from Michael Sweeney who planned to rent a house in August on Hawai'i Island. Told him that currently under the emergency order short term rentals are illegal to rent to vacationers, and to check HTA's website for updates. (May 16)
- Responded to an email from Cathy Quaglia asking about flying from the East Coast to Honolulu, then Maui, if she has to quarantine in Honolulu, and if she can take a test to get out of the quarantine. Told her if she doesn't leave Honolulu Airport she will not have to quarantine on O'ahu, and that testing is not an option at this time. (May 17)

- Responded to an email from George Reimer asking for an exemption so that he can visit his family stationed at Pearl Harbor. Told him the exemption is mainly for people traveling for essential business and not for leisure travel, but gave him the link to HTA's website where he could find the email address to request an exemption. (May 17)
- Responded to an email from Craig Oswald who has plans to travel to Hawai'i in July, asking about the quarantine. Told him to check HTA's website for updates. (May 18)
- Responded to a follow-up email from Clint Spencer asking about traveling to Kaua'i in August and he planned to stay in a vacation rental. Explained the quarantine and that vacation rentals are illegal under the current order. (May 19)
- Responded to an email from Danny Meyer asking about coming to visit in late June and renting a car. Told him under the order, he must quarantine the whole 14 days, not only until July 1, and that he can't rent a car while under quarantine. (May 19)
- Responded to an email from Carolina Capulong of Las Vegas who wanted to come to Hawai'i for a funeral and whether or not she still has to quarantine. Told her the quarantine applies to all incoming passengers, but she can check if she can get an exemption through the email address listed on HTA's website. (May 19)
- Responded to email from future visitor Louis Cunningham asking about visiting in October. Told him that's too far into the future to predict and to check HTA's website for updates. (May 20)
- Responded to a follow up email from Richard Lasser asking if they can leave during quarantine "to go to the store or pharmacy like locals." Told him he could bring his own food from home or buy through delivery service. (May 22)
- Responded to an email from Mike Montano who has a trip scheduled for July 16, asking if the quarantine will be lifted by then. Told him Gov. Ige hasn't made a decision yet and to check HTA's website for updates. (May 22)
- Responded to an email from Jeff Hupp of Seattle asking when the quarantine will be lifted. Told him that the situation is fluid and to check HTA's website for updates. (May 23)
- Responded to an email from Janice Rose, who has reservations for a trip to Kaua'i on July 13th, asking if she will be able to enjoy all the activities including a lū'au, pineapple factories, and turtle beach. Told her that Gov. Ige extended the quarantine till the end of June and could possibly extend it again. (May 25)
- Responded to an email from Luanne Green asking about her arrival on July 13. Explained about the quarantine order, which could be extended to when she's set to arrive. (May 25)
- Responded to an email from Nina Garcia Lazo who says she has an upcoming visit to Kaua'i on July 7 and wonders if she can take a test in lieu of the quarantine. Told her not at this time and to check HTA's website for updates on the situation. (May 26)

- Responded to an email from Chris Lopez asking about a possible trip at the end of July. Told him about the quarantine order which could be extended into July, and to check HTA's website for updates. (May 26)
- Responded to an email from Mike Bain who said he moved his trip to July 4 hoping the quarantine would be lifted by then. Told him that it may not be. (May 27)
- Responded to an email from Michael Monroe who assumed the quarantine would be over when he flies into Hawai'i on June 6. Told him that it has already been extended through at least June 30, and that he will be subject to the quarantine. (May 28)
- Responded to an email from Kitt McElhaney asking if the quarantine will be in place when she plans to visit Maui on July 21. Told her that Gov. Ige just verbally announced on Facebook Live that he plans to extend it beyond June 30 but didn't say until when, and to check HTA's website for updates. (May 29)
- Responded to an email from Pamela Shaw asking if the quarantine will be in place when she plans to visit Hawai'i on July 11th. Told her that Gov. Ige just verbally announced on Facebook Live that he plans to extend it beyond June 30th but didn't say until when, and to check HTA's website for updates. (May 29)
- Responded to an email from Robert Kwitkin asking when he should visit and to send brochures. Sent him the link to GoHawaii.com, and to visit after the quarantine is lifted. (May 30)
- Responded to an email from Becky Corken, who says she wants to visit Hawai'i during Christmas. Told her that's typically one of the busiest times in Hawai'i, but to also follow the situation since things are very different this year so far. (May 30)
- Responded to an email from Craig Arcuri, who says he wants to come to Maui in two weeks and wants to know if taking a test would exempt him from the quarantine. Told him that is currently not an option. (May 31)
- Responded to an email from Tammy Chisholm asking about their upcoming trip to Hawai'i Island in August and if things will be open by then. Told her that it's a fluid situation and to check HTA's website for updates. (May 31)
- Responded to an email from Jim Fountain, who plans to visit Hawai'i on a Celebrity cruise ship in September, asking about the quarantine. Told him to check HTA's website for updates on the situation. (May 31)
- Responded to a Facebook message from Elissa Wright who has reservations to visit Hawai'i in July and says she thought she read that visitors could take a test to get out of the quarantine. Told her currently testing is not an option, and to check HTA's website for updates on the situation. (May 31)
- Resident Inquiries
 - Responded to an email from Mike Perdue of Hilo asking about the LAX to ITO flight. Advised him that United hasn't been flying its LAX to ITO flight since the quarantine started. (May 6)

- Responded to an email from Katie Ranke of Kaua'i asking about interisland data, and also thanking HTA for publishing the daily passenger arrivals. Told her DBEDT handles the interisland data. (May 7)
- Responded to an email from Erica Jones, who said she has family coming to Hawai'i on June 2, and asked about the quarantine. Told her the Governor could extend the quarantine and to check HTA's website for updates. (May 8)
- Responded to an email from Nick Sakovich of Hilo asking where he can find kama'āina rates. Told him HTA doesn't keep a list, and especially since most hotels are closed right now. Suggested he call the hotels that are open to inquire about a kama'āina rate. (May 11)
- Responded to an email from Heidi Drahn, who is fostering a baby boy on Maui, and is asking if the boy's grandparents can come to pick him up, staying overnight on Maui and leaving the next day. Gave her their options. (May 11)
- Responded to email from Sherry Bracken asking why a flight into Kona has no crew. Told her if it's a private jet that's just dropping off passengers, and the crew doesn't get off then the crew does not get counted. (May 11)
- Responded to an email from John Dai of Honolulu asking if he should contact vaccine researchers in Asia and Europe to save their products to help Hawai'i. Told him HTA is not involved in that decision-making process and to contact the DOH. (May 13)
- Responded to a Facebook message from Lori Kiyabu Balisacan of Kaua'i notifying of what she believes is an illegal advertisement of a vacation rental on Hawai'i Island. Told her to contact the county's planning department or police if she sees someone violating the order. (May 13)
- Responded to an email from resident Brandon Kamigaki regarding whether or not there's an online database that businesses can search for customers to see if they should be in quarantine. Told him it's not accessible to the public because of privacy laws, however if he suspects someone is breaking the order to call 911, and that his business also has the right to refuse service under federal law, but also to keep in mind that returning residents outnumber visitors on flights and more than 90% of positive cases are residents. (May 22)
- Responded to an email from Celia Arcilla of Maui asking when the Philippines Airlines will fly to Hawai'i again. Advised her it looks like they will start up again in early June, and that there's also a flight to Guam to/from HNL. (May 24)
- Responded to an email from RicAnne Fowler who said her son is coming to stay with her, visiting from the mainland, and whether that will prevent her from going to work. Told her that the order does not say everyone in the household needs to quarantine. (May 25)
- Responded to an email from O'ahu resident Mark Hildebrant asking what hotels have a kama'āina rate. Told him HTA does not compile such a list, however he can find the list of open hotels on the Senate special committee's website, or he can just call the hotels directly. (May 29)

- Responded to an email from Lori Wash of Maui asking if she can return from Ohio to Maui through O'ahu without having to quarantine on O'ahu. Explained that if she doesn't leave the airport she will be considered a transit passenger. (May 30)
- Responded to an email from John Brizdle asking for a summary of the passenger arrivals for April. Advised him he could view all of the press releases for April, and that HTA is currently working on totals for March 26-April 30, not just the month of April, so he could manually add up the numbers. (May 1)
- Responded to an email from Jordan and Gail Nagasako of Hawai'i offering their vacation rental to be used for the Hotels for Heroes program. Connected them with HLTA. (May 3)
- Responded to an email from Carly Walsh asking if the quarantine will be extended through July. Told her we don't know that far in advance and to check HTA's website for updates. (May 4)
- Responded to an email from Tom Brown asking if the quarantine will be extended through July. Told him we don't know yet if the Governor will extend the quarantine as it depends on the situation, and to check HTA's website for updates. (May 4)
- Responded to a Facebook message from Pedro Pineda asking about letting New Zealand tourists come to Hawai'i. Advised him there is no restriction at this time, however, they must still abide by the 14-day quarantine. (May 4)
- Responded to a Facebook message from Robbie Ray Tongg addressed to MH and staff complaining about tourism. Told him that MH works for HLTA not HTA. (May 4)
- Responded to an email from Mark Lachman asking when the quarantine will be lifted. (May 5)
- Responded to email from Kaina Neuman, president of local tour company And You Creations, asking when Hawai'i will reopen to tourism. Told her it's up to the Governor and to let him know about her company's predicament, along with letting others know about the benefits of tourism. (May 5)
- Responded to an email from Alex Da Silva of Hawaiian Airlines regarding HTA's method of collecting data on passenger arrivals and why the numbers are different from DBEDT's. (May 6)
- Responded to an email from Thomas Fairbanks, owner of the Old Wailuku Inn at Ulupono, asking about a new marketing plan for a safe reopening that he said would be out on May 1. Told him that there was no such document and referred him to the latest letter CT had sent to the industry. (May 6)
- Responded to an email from Dalmar Duran asking about an exemption so he can fly in and work on a construction project. Gave him the email where he can inquire about getting an exemption. (May 6)
- Responded to an email from Thomas Bernal asking about an exemption so he can fly in and work on a construction project. Gave him the email where he can inquire about an exemption. (May 6)
- Responded to an email from Kristie Choi of Hawaiian Airlines asking about interisland travel data. Advised her that DBEDT is handling that. (May 6)

- Responded to an email from Keoni May asking about having all tourists tested for COVID-19 before they come to Hawai'i and that upon arrival they should be bused to restaurants and tourist areas, and be roped off. Told him that the testing isn't up to HTA to decide, and that more than 80% of positive cases in Hawai'i are local residents, not visitors. (May 7)
- Gov. Ige's office: Responded to an email forwarded by Kadeen Welch-Taniguchi from Cindy Iwane asking when tourism will reopen. Told Kadeen that it's up to the Governor and sent her a quote from his press conference. (May 7)
- Responded to an email from Alison Blue who has clients asking about future travel in June. Told her it's a fluid situation and we don't know yet if the Governor will extend the quarantine into June so to keep checking HTA's website for updates. (May 7)
- Responded to an email from Charles Powers complaining that Hawaiian Airlines will not refund their money. Told him it's best if he goes through the company he booked through or his credit card company. (May 9)
- Responded to an email from Tiffany Karnig complaining that VacationCandy will not refund their money. Told her it's best if she goes through the company she booked through or her credit card company. (May 9)
- Responded to a Facebook message from Sheleigh Murphy asking why travel websites don't say you have to quarantine. Told her that HVCB personally sent letters to the travel companies and followed up with them asking them to notify customers, but that ultimately you can't force a business to put specific wording on their website. Also asked which websites are lacking the notifications but she didn't respond back. (May 9)
- Responded to a Facebook message from Robin Matt Clark asking if the quarantine will be lifted by June 1 and if she can rent a car. Explained the situation. (May 9)
- Responded to an email from Annie Lew complaining that Hawaiian Airlines will only give her a voucher and not a refund. Told her it's best if she goes through the company she booked through or her credit card company. (May 10)
- Responded to an email from Sario Yip asking for a copy of the state's decision for the quarantine. Sent him the link to the emergency orders. (May 10)
- Responded to an email from Bob Concepcion asking if the quarantine will be lifted by June 23. Told him it's a fluid situation and that Gov. Ige could extend it again, and to keep checking HTA's website for updates on the quarantine. (May 10)
- Responded to a complaint from Jeannet Leendertse regarding VRBO and Equity Residences not giving a refund and giving them the runaround. Told her that HTA is not a regulatory agency and to go through the company she booked through or her credit card company. (May 10)
- Responded to a Facebook message from David Williams asking HTA not to support the quarantine extension. Told him that it's up to Gov. Ige to make the decision regarding the quarantine. (May 10)
- Responded to an email from Keith Henderson, who says his mother has a condo on Moloka'i that he wants to work on. He wanted to know if he can come to O'ahu for one night then move on to Moloka'i, then go to the store to get supplies. Explained the situation. (May 11)

- Responded to an email from Nestor Garcia, communications director for Congressman Ed Case, asking for an updated visitor count. (May 11)
- Responded to an email from Julia Matsuura with the Beall Corporation, a commercial real estate broker in Waikīkī, asking which hotels are open. Connected her with HLTA. (May 11)
- Responded to an email from Tanya Hellum, who had suggestions for reopening Hawai'i for tourism. Told her that it's ultimately up to Gov. Ige to lift the quarantine and to share her thoughts with the Recovery Navigator committee. (May 11)
- Responded to an email from Jon Gelman of Hawai'i Marine Animal Response, asking if HTA plans to issue a press release asking the public not to disturb the turtles, and that he's concerned that two dogs off leash tried to attack monk seals. Suggested he reach out to NOAA. (May 11)
- Contacted Honolulu Police Department (HPD) Captain Ben Moszkowicz after learning that the dispatchers don't have current information. He said he'd follow up since he updates the data daily for them. (May 11)
- Responded to an email from Lauren Madden complaining about VRBO owners who are still renting on Maui. Connected her with the head of Maui County zoning. (May 12)
- Responded to an email from Ken Kachmarik asking if the quarantine will be extended past May 31. Told him the situation is fluid and it's up to the Governor to decide whether to lift the quarantine. (May 12)
- Responded to an email from Stewart Eads asking if the quarantine will be extended into June. Told him the situation is fluid and it's up to the Governor to decide whether to lift the quarantine. (May 12)
- Responded to an email from Wallace Choy regarding proposed solutions for hotels that can't participate in the single-use key program. Connected him with HLTA. (May 12)
- Responded to an email from Dawn Dean asking if the quarantine will be lifted by May 31. Told her that Kaua'i's mayor just extended it through June 30. (May 13)
- Responded to an email from Clint Spencer asking if the quarantine will be lifted for Kaua'i by June. Told him that Kaua'i's mayor just extended it through June 30. (May 13)
- Responded to a follow-up email from Clint Spencer asking if other islands such as Maui will lift the quarantine order before June. Told him that Maui's mayor verbally announced that it will be in place through at least the end of June. (May 14)
- Responded to an email from Sandy Friedman, who wants to fly from Singapore to Hawai'i. Explained the quarantine and that there are limited flights from Asia, such as from Japan. (May 14)
- Forwarded CT an email from Roy Tai of Hawai'i, who voiced his opinion on how passengers should be tested before they fly to Hawai'i. (May 14)
- Responded to an email from Mark Giegerich asking if the quarantine will be lifted by June. Told him there's a good chance the quarantine order will be extended through the end of June and to check HTA's website for updates. (May 14)

- Responded to an email from Krislyn Hashimoto, who's handling public relations for Aloha Festivals, asking if HTA will issue a press release regarding the funding cut. Told her that HTA will not as CT will be advising the HTA board first during the upcoming meeting. (May 14)
- Responded to an email from Marni 'Āina of Travaasa Hāna asking for a digital or physical flyer that hotels can use to inform their guests about the quarantine. Sent her a link to HTA's website. (May 14)
- Responded to an email from Holly Player asking if the quarantine will be lifted by July 2. Told her the situation is fluid and to check HTA's website for updates. (May 15)
- Responded to a Facebook message from Michelle Tchea asking for an image of spam sushi. Provided her the link to Barberstock. (May 15)
- Responded to an email from Diane Williams asking if someone can skip the quarantine if they take a test. Told her not at this time and explained the quarantine order. (May 16)
- Responded to an email from Stacey Engstrom asking about the quarantine order, and why the date hasn't been updated on HTA's website. Told her that Gov. Ige verbally announced he would push it back to the end of June during a Facebook Live but it wasn't in writing yet. (May 16)
- Responded to an email from Luanne Green asking if the quarantine will be lifted by July. Told her it's a fluid situation and to check HTA's website for updates. (May 16)
- Responded to an email from Terri Miller asking if people have to stay for 14 days under the quarantine order. Told her they can stay for a shorter length but would have to quarantine the whole time, and that they're not allowed to rent a car. (May 17)
- Responded to an email from Senh Sawn Voong asking about the quarantine order, and why the date hasn't been updated on HTA's website. Told him that Gov. Ige verbally announced he would push it back to the end of June during a Facebook Live but it wasn't in writing yet. (May 18)
- Responded to a follow-up email from Terri Miller asking if the quarantine was extended through June. Told her that Gov. Ige verbally announced he would push it back to the end of June during a Facebook Live but it wasn't in writing yet. (May 18)
- Responded to an email from Mike Baker asking for an exemption for essential travel. Told him to go to HTA's website for information. (May 18)
- Responded to an email from Tom Norheim criticizing the quarantine order. (May 18)
- Responded to an email from Theresa van Greunen of Aqua-Aston corporate communications, asking for an update to the one-time room key document submitted to the Senate special committee. Forwarded her message to HLTA. (May 18)
- Responded to an email from Rob and Sharon Guidera asking about the quarantine order, and why the date hasn't been updated on HTA's website. Told them that Gov. Ige verbally announced he would push it back to the end of June during a Facebook Live but it wasn't in writing yet. (May 18)
- Responded to an email from Jennifer DeVera asking for a copy of her daughter's quarantine form. Kristin Andres (KA) assisted her. (May 18)

- Responded to an email from Steven Dublirer asking when the quarantine will be lifted. Told him Gov. Ige just extended it through the end of June. (May 18)
- Responded to a Facebook message from Paul Sol asking if Hawai'i will start accepting tourists from the mainland for less than 14 days. Told him that people can come to visit for less than 14 days but the quarantine still applies, meaning they'd have to be in quarantine for their entire trip. (May 18)
- Responded to a Facebook message from Sherri Martagon asking if the quarantine has been extended. Told her that Gov. Ige said it verbally during this Facebook Live a week ago and it's expected to be in writing in his 8th supplementary proclamation. (May 18)
- Responded to an email from Malcolm Soh asking about a British citizen visiting from Hong Kong now. Told him about the quarantine. (May 18)
- Responded to an email from Kris Thompson asking if the quarantine ending on June 30 is a firm date. Told him that it's a fluid situation and the Gov. could possibly extend it again, and to check HTA's website for updates. (May 19)
- Responded to an email from Juan Navarro-Lagos asking about the quarantine. (May 19)
- Responded to an email from Glenda Ruiz of KHM Travel Agent group who says she's pushing for U.S. travel, and wanted to schedule a Go Hawai'i Zoom meeting. Suggested she reach out to HVCB. (May 19)
- Responded to an email from Cheri Potechin asking when all the major airlines will have direct flights landing on Maui. Told her they were never prevented by the FAA from doing so, and to check with the specific airlines, and that airlines are still flying into OGG from out of state. (May 20)
- Responded to an email from Lance Peacock asking and complaining about how long we're going to keep Hawai'i shut down. Told him the decision is up to Gov. Ige, and that the quarantine now goes through the end of June. (May 20)
- Responded to an email from Steven Bowlin complaining about not getting a refund from Aloha Sunshine Tour. (May 21)
- Responded to an email from FEDEX pilot Dan Budzinski asking if he can leave his room to walk to the golf course, because he assumed he can leave for essentials and exercise. Explained that crew are required to quarantine when not working, and he cannot leave to go golfing. (May 21)
- Responded to an email from "rl1" asking if someone goes directly to their place of lodging if they can leave afterwards to go to the store or gas station. (May 21)
- Responded to an email from John Popovich asking for information on contact tracer positions. Sent him the press release from the University of Hawai'i and the DOH. (May 21)
- Responded to an email from Pamela Faust of Silhouette Travel asking if there's a test people can take to bypass the quarantine. Told her not at this time. (May 22)

- Responded to an email from Steven Wetherell asking when the quarantine will be lifted. Told him Gov. Ige hasn't made a decision yet and to check HTA's website for updates. (May 22)
- Responded to an email from Donna Brucato asking to confirm rumors she heard that the government is trying to pull away from tourism and is thus slow to open Hawai'i. Told her that it's up to Gov. Ige to make the decision with input from the DOH, the Recovery Navigator, HI-EMA, and many others. (May 22)
- Responded to an email from Jennifer Hayes who has a trip planned for July 23 to Kaua'i. Told her that the situation is fluid and to check HTA's website for updates on quarantine extensions. (May 23)
- Responded to a follow-up email from Donna Brucato asking about the one-time room key program and how business travelers are affected. (May 23)
- Responded to an email from Sen. Glenn Wakai asking for a list of COVID-19 screening sites. Sent him the link to the Healthcare Association of Hawai'i, and also that Premiere Medical Group has been holding free testing clinics at various locations across the state. (May 24)
- Responded to an email from Lesa Warner-Burke of Fine Island Properties on Maui asking about the Delta nonstop flights to Maui. Sent her the link to the press release archives, which show there are flights coming into Maui. (May 24)
- Responded to an email from Kevin Maci of Connoisseur Travel complaining about the treatment of present and future visitors, saying they should not be treated like household pets. (May 25)
- Responded to an email from Greg complaining about what Hawai'i is doing to tourists, such as arresting people on the beach. (May 25)
- Responded to an email from Janet Snyder, Hawai'i County PR specialist, asking for the Word version of Gov. Ige's 8th supp proc. Advised her to ask the Gov.'s office. (May 25)
- Responded to an email from Ross Thurling, who owns an apartment in Waikīkī, asking about coming because his homeowners association is finishing a major plumbing project and he needs to be there for it. Explained the rules of the quarantine. (May 26)
- Responded to an email from Roen Wainscoat, a student in Hawai'i who created a website pulling in data from the DOH, asking if HTA can direct people to his page. Told him that HTA is a state agency and links to official state websites. (May 26)
- Responded to an email from Bill asking if HTA can revise the declaration form to better suit the ferry travelers to and from Maui and Lāna'i. Told him that the DOT is in charge of creating the form instead. (May 26)
- Responded to an email from Lyn McNutt of Kaua'i Community College asking about interisland travel numbers. Told her that DBEDT is collecting that data. (May 26)
- Responded to an email from Cathy Quaglia asking if she can take a test to avoid doing the quarantine. Told her that is not an option at this time. (May 26)

- Responded to an email from Kasie Takayama, legislative analyst for Maui County, inviting HTA to an Environmental, Agricultural, and Cultural Preservation committee meeting. CT declined as HTA is working on plans to collaborate with all the counties on this topic. (May 26)
- Responded to an email from Bruce McKinnie complaining about the Go Waikīkī shuttle not issuing them a refund or answering calls. Told him for refunds it's best to go through the company they booked through or his credit card company. (May 26)
- Responded to an email from CA Polytechnic State University student Tiana Reber asking for an interview regarding how COVID-19 is affecting the economy. Suggested she reach out to economists at UHERO or DBEDT and gave her the link to the HTA Strategic Plan's economic benefits section. (May 27)
- Responded to an email from Shelly Smith asking if there will still be a quarantine in September. Told her the situation is fluid and to check HTA's website for updates. (May 27)
- Responded to an email from David Sadava, who had suggestions about testing. Told him that the DOH and Governor make decisions regarding that. (May 27)
- Responded to an email from Cindy McMillan, Gov. Ige's communications director asking how someone can find a hotel room in Hawai'i. Sent her the link to the Senate special committee site, which has a list of the open hotels that HLTA contacted for the one-time room key program, and also GoHawaii.com to see which hotels are closed. (May 28)
- Responded to an email from Evelyn Horn asking if the quarantine will be extended past June 30. Told her that Gov. Ige just verbally announced on Facebook Live that he plans to extend it beyond then. (May 28)
- Responded to an email from Richard Tausch asking whether tourism will reopen to one island, then another, or all islands at once. Told him that Gov. Ige just verbally announced on Facebook Live that he plans to extend the quarantine beyond June 30 and it would likely apply to the whole state at once, but since it's a fluid situation to check HTA's website for updates. (May 28)
- Responded to an email from Todd Robinson who assumed he and his family could get tested to avoid having to do the quarantine and wants all passengers to get tested first so that he doesn't get sick from them. Told him that testing is currently not an option to avoid the quarantine. (May 28)
- Responded to an email from Iain McManus asking if the quarantine will be extended past May 31. Told her that Gov. Ige already extended it to June 30 in writing, but he just verbally announced on Facebook Live that he plans to extend it beyond then. (May 28)
- Responded to an email from Margo and Dave Beecher complaining about not getting a refund after booking a rental property on O'ahu's North Shore through VRBO. Told her to go through the company she booked through or her credit card company for a refund. (May 29)
- Responded to an email from Julie Rininger asking if the quarantine will be in place beyond the end of June. Told her that Gov. Ige just verbally announced on Facebook Live that he plans to extend it beyond June 30th but didn't say until when, and to check HTA's website for updates. (May 29)

- Responded to an email from Liz Galloway of UnCruise Adventures, hoping to have KK take part in their Virtual Travel Chat. Forwarded the info to KK. (May 29)
- Responded to a Facebook message from Misters Misterx reporting a possible quarantine violation by a tourist. Told him to contact 911 to report anyone suspected of breaking the law. (May 29)
- Responded to an email from Ron Rimelman complaining about Gov. Ige's lack of communication skills and ability to manage. (May 30)
- Responded to an email from Jenna Calasa, daughter of Lori Walsh who had emailed earlier. She says she is pregnant and if her flight comes in late, she doesn't want to spend the night at the airport before she can transfer to Maui. Told her based on the quarantine order she can't leave HNL airport, and then catch a flight to Maui the next morning, and to also check with her doctor to make sure it's ok to fly. (May 30)
- Responded to an email from Lori Carlin asking when the Governor will announce when the quarantine will be lifted. Told her that Gov. Ige verbally said during his Facebook Live that he plans to extend it beyond June 30. (May 30)
- Responded to an email from Haley Hobbs, a University of Ohio student, asking for advice regarding an internship because she has dreamed of living in Hawai'i. Suggested she reach out to the hotels directly after the emergency is over since many are still closed. (May 31)
- Responded to an email from Missy Melissa Elijah asking about the program to pay people to leave and about refunds for lodging. (May 31)

Monthly Statistics on Followers and Engagement on HTA's Facebook Page

Number of followers from May 2019 vs. May 2020: **+32.36%**

- May 31, 2019: 10,694
- May 31, 2020: 14,155

Engagement rate from May 2019 vs. May 2020: **+234.41%**

- May 2019: 1,770 daily page engaged users
- May 2020: 5,919 daily page engaged users

Social Media Posts on HTA's Facebook Page

- May 1: Post on the complimentary webinars in partnership with the Hawai'i Alliance of Nonprofit Organizations. **Total Reach** 1,063 | **Total Reactions** 54
- May 1: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach** 687 | **Total Reactions** 52
- May 1: Post sharing Kāhuli Leo Le'a's announcement of the Hawaiian Airlines May Day 2020: Aloha 'Āina event. **Total Reach** 1,154 | **Total Reactions** 38
- May 1: Watch party for the Hawaiian Airlines May Day 2020: Aloha 'Āina event. **Total Reach** 804 | **Total Reactions** 98
- May 2: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach** 1,006 | **Total Reactions** 46

- May 3: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 671 | Total Reactions 49**
- May 4: Post sharing Hawai'i House of Representative's announcement of an informational briefing of the House Select Committee on COVID-19 Economic and Financial Preparedness. **Total Reach 728 | Total Reactions 46**
- May 4: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 498 | Total Reactions 20**
- May 4: Post sharing Governor David Ige's Facebook Live press conference in response to COVID-19. **Total Reach 1,324 | Total Reactions 136**
- May 4: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 687 | Total Reactions 26**
- May 5: Post sharing Governor David Ige's announcement of the Facebook Live press conference in response to COVID-19. **Total Reach 639 | Total Reactions 26**
- May 5: Post sharing Governor David Ige's Facebook Live press conference announcing the signing of the 7th Supplemental Emergency Proclamation in response to COVID-19. **Total Reach 1,307 | Total Reactions 184**
- May 5: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 646 | Total Reactions 49**
- May 5: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 623 | Total Reactions 4**
- May 5: Post announcing Governor David Ige issuing the 7th Supplemental Emergency Proclamation. **Total Reach 948 | Total Reactions 101**
- May 6: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 511 | Total Reactions 32**
- May 6: Post sharing Mayor Kirk Caldwell's Facebook Live press conference on the City and County of Honolulu's response to COVID-19. **Total Reach 682 | Total Reactions 36**
- May 6: Post sharing Governor David Ige's announcement of the Facebook Live press conference in response to COVID-19. **Total Reach 535 | Total Reactions 21**
- May 6: Post sharing Governor David Ige's Facebook Live press conference in response to COVID-19. **Total Reach 945 | Total Reactions 87**
- May 6: Post on the Hawai'i State Senate Special Committee on COVID-19 reconvened on May 7. **Total Reach 736 | Total Reactions 63**
- May 6: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 538 | Total Reactions 18**
- May 7: Post on HTA's Hawai'i Passenger Arrivals press release showcasing the breakdown of what visitors on O'ahu indicate as their accommodations from March 26 through April 30. **Total Reach 2,135 | Total Reactions 642**

- May 7: Post on HTA's Hawai'i Passenger Arrivals press release showcasing the breakdown of what visitors on O'ahu indicate as their purpose of travel from March 26 through April 30. **Total Reach 837 | Total Reactions 99**
- May 7: Post sharing Governor David Ige's announcement of Facebook Live Community Connection with Department of Labor and Industrial Relations Director Scott Murakami. **Total Reach 660 | Total Reactions 37**
- May 7: Post sharing Governor David Ige's Facebook Live Community Connection with Department of Labor and Industrial Relations Director Scott Murakami. **Total Reach 987 | Total Reactions 85**
- May 7: Post sharing Hawai'i State Senate's Facebook Live press conference with Senate President Ron Kouchi and House Speaker Scott Saiki. **Total Reach 687 | Total Reactions 28**
- May 7: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 593 | Total Reactions 15**
- May 7: Post sharing Mayor Kirk Caldwell's Facebook Live press conference on the City and County of Honolulu's response to COVID-19. **Total Reach 681 | Total Reactions 41**
- May 8: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 1,010 | Total Reactions 105**
- May 8: Post sharing Mayor Kirk Caldwell's Facebook Live press conference on the City and County of Honolulu's response to COVID-19. **Total Reach 693 | Total Reactions 48**
- May 9: Post on HTA's Hawai'i Passenger Arrivals press release showcasing the breakdown of what visitors on O'ahu indicate as their purpose of travel. **Total Reach 1,267 | Total Reactions 197**
- May 11: Post sharing Hawai'i House of Representative's announcement of an informational briefing of the House Select Committee on COVID-19 Economic and Financial Preparedness. **Total Reach 395 | Total Reactions 20**
- May 11: Post sharing Hawai'i House of Representatives announcement of the reconvened legislative session broadcasted on 'Ōlelo Community Media. **Total Reach 502 | Total Reactions 5**
- May 11: Post sharing Hawai'i House of Representatives announcement of the Senate and House Budget Committees to hold a daily media availability via Zoom. **Total Reach 746 | Total Reactions 31**
- May 11: Post sharing Governor David Ige's Facebook Live press conference in response to COVID-19. **Total Reach 963 | Total Reactions 94**
- May 11: Post sharing Hawai'i State Senate's Facebook Live press conference with Senator Kalani English and Senator Michelle Kidani. **Total Reach 817 | Total Reactions 61**

- May 11: Post sharing Hawai'i State Senate's Facebook Live press conference with Chairs Senator Donovan Dela Cruz and Representative Sylvia Luke. **Total Reach 676 | Total Reactions 24**
- May 11: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 579 | Total Reactions 15**
- May 12: Post sharing Mayor Kirk Caldwell's Facebook Live press conference on the City and County of Honolulu's response to COVID-19. **Total Reach 668 | Total Reactions 28**
- May 12: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 1,021 | Total Reactions 88**
- May 13: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 995 | Total Reactions 57**
- May 13: Post sharing Governor David Ige's Facebook Live press conference in response to COVID-19. **Total Reach 1,043 | Total Reactions 91**
- May 14: Post sharing Mayor Kirk Caldwell's Facebook Live press conference on the City and County of Honolulu's response to COVID-19. **Total Reach 1,003 | Total Reactions 123**
- May 14: Post sharing Governor David Ige's Facebook Live Community Connection with Dr. Park and Dr. Desmond from the Department of Health. **Total Reach 876 | Total Reactions 42**
- May 14: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 671 | Total Reactions 21**
- May 14: Post sharing Hawai'i State Senate's Facebook Live press conference with Chairs Senator Donovan Dela Cruz and Representative Sylvia Luke to discuss the state budget. **Total Reach 563 | Total Reactions 9**
- May 15: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 617 | Total Reactions 13**
- May 15: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 972 | Total Reactions 54**
- May 15: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 893 | Total Reactions 22**
- May 15: Post sharing Hawai'i State Senate's Facebook Live press conference with Budget Committee Chairs to discuss the state budget. **Total Reach 687 | Total Reactions 33**
- May 18: Post sharing Honolulu Star-Advertiser's Facebook Live with Governor David Ige on the COVID-19 Care Conversation. **Total Reach 703 | Total Reactions 116**
- May 18: Post sharing Governor David Ige's Facebook Live press conference announcing the 8th Emergency Proclamation in response to COVID-19. **Total Reach 1,664 | Total Reactions 350**

- May 18: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 744 | Total Reactions 33**
- May 19: Post sharing Mayor Kirk Caldwell's Facebook Live press conference on the City and County of Honolulu's response to COVID-19. **Total Reach 995 | Total Reactions 66**
- May 19: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 1,046 | Total Reactions 66**
- May 19: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 661 | Total Reactions 12**
- May 20: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 1,061 | Total Reactions 55**
- May 20: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 703 | Total Reactions 12**
- May 21: Post announcing the Committee on Ways and Means' informational briefing. **Total Reach 837 | Total Reactions 66**
- May 21: Post sharing Governor David Ige's Facebook Live press conference in response to COVID-19. **Total Reach 1,331 | Total Reactions 114**
- May 21: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 964 | Total Reactions 20**
- May 22: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 892 | Total Reactions 50**
- May 22: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 1,029 | Total Reactions 30**
- May 25: Post on signing up for HTA's email distribution list. **Total Reach 797 | Total Reactions 60**
- May 25: Post on HTA's alerts page with COVID-19 information and resources. **Total Reach 1,372 | Total Reactions 312**
- May 26: Post sharing Mayor Kirk Caldwell's Facebook Live press conference on the City and County of Honolulu's response to COVID-19. **Total Reach 1,240 | Total Reactions 88**
- May 26: Post sharing Governor David Ige's Facebook Live press conference on new guidelines and contract opportunities for childcare facilities and providers in response to COVID-19. **Total Reach 974 | Total Reactions 72**
- May 26: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 716 | Total Reactions 23**
- May 26: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 1,091 | Total Reactions 33**

- May 27: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 886 | Total Reactions 47**
- May 27: Video post of HTA's regular marketing standing meeting broadcasted via Facebook Live. **Total Reach 7,116 | Total Reactions 2,088**
- May 27: Post announcing HTA's regular marketing standing meeting broadcasted via Facebook Live to begin shortly. **Total Reach 1,275 | Total Reactions 244**
- May 28: Post announcing HTA's regular board meeting broadcasted via Facebook Live to begin shortly. **Total Reach 662 | Total Reactions 58**
- May 28: Video post of HTA's regular board meeting broadcasted via Facebook Live. **Total Reach 6,635 | Total Reactions 2,721**
- May 28: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 809 | Total Reactions 47**
- May 28: Post sharing Governor David Ige's announcement of the Community Connection edition with County Mayors via Facebook Live. **Total Reach 539 | Total Reactions 13**
- May 28: Post sharing Governor David Ige's Facebook Live Community Connection with County Mayors. **Total Reach 1,739 | Total Reactions 371**
- May 28: Post on the Hawai'i Visitor Statistics press release. **Total Reach 701 | Total Reactions 43**
- May 28: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 819 | Total Reactions 42**
- May 29: Post sharing County of Kaua'i's Facebook Live of Mayor Derek Kawakami sharing the latest updates of COVID-19. **Total Reach 975 | Total Reactions 49**
- May 29: Post sharing County of Maui's Facebook Live press conference with Mayor Michael Victorino in response to COVID-19. **Total Reach 854 | Total Reactions 54**

Monthly Statistics on Followers and Engagement on HTA's Instagram Page

Number of followers from May 2019 – May 2020: **+49.03%**

- May 31, 2019: 2,119
- May 31, 2020: 3,158

Engagement rate for May 2019 vs. May 2020 cannot be compared due to minimal posts (1) in May 2019.

Social Media Posts on HTA's Instagram Page

- May 1: Post on the complimentary webinars in partnership with the Hawai'i Alliance of Nonprofit Organizations. **Total Reactions 43**

Monthly Statistics on Followers and Engagement on HTA's Twitter Page

Number of followers from May 2019 – May 2020: **+1.89%**

- May 31, 2019: 36,219
- May 31, 2020: 36,903

Engagement rate for May 2019 vs. May 2020 cannot be compared due to minimal tweets (1) in May 2019.

Social Media Posts on HTA's Twitter Page

- May 1: Post on the complimentary webinars in partnership with the Hawai'i Alliance of Nonprofit Organizations.

Internal Communications

- Gave Kristen Andres (KA) and Anda Garel (AG) talking points in response to an email from Alice Parcell of San Francisco asking about the quarantine and how people are being told about it. (May 1)
- Gave AG talking points in response to an email from Jack Corteway asking what happens to Hawai'i if they can't increase visitors. Told her to tell him that there's a committee working on the state's recovery plan. (May 1)
- Gave AG talking points in response to an email from Mike Dandurand of Kaua'i asking to be part of HTA's email distribution list. Told her how he can sign up through HTA's website. (May 1)
- Gave AG talking points in response to an email from Anna Scott of Four Seasons Resort at Ko Olina, asking about the Kōkua Ka'ū Ka'ū kit program. Told her that it's actually an HLTA program, not an HTA program. (May 1)
- Gave AG talking points in response to an email from John Waddell alleging that the Governor's orders are unconstitutional. Told her to tell him to reach out to the Governor's office because those are his orders not HTA's. (May 4)
- Gave AG talking points in response to an email from Leslie Ann Sherman-Aoun, general manager of The Best Po'ipū Resorts, asking about a situation where she is letting her friend use their condo and the Mayor's office is not allowing them to do that. Told her to have her explain the situation to the Mayor's office. (May 4)
- Gave AG talking points in response to an email from Kyle Ragan, guest services manager at Holiday Inn Express Waikīkī, asking about Hotels for Heroes. Told her to connect him with HLTA since they're in charge of the program. (May 4)
- Sent Honolulu Mayor Caldwell's communications team an email from Sen. Mike Gabbard to CT regarding some postings for illegal vacation rentals. Asked them to forward to the Department of Planning and Permitting. (May 4)
- Gave talking points to KA in response to a call from Reiko, a manager at the Queen's Medical Center, asking about a female patient who needs financial help getting back to the mainland. Referred her to Keith Regan (KR) and VASH. (May 5)

- Gave talking points to AG regarding an email from Lois Crozer of Lanikai asking for an appointment with CT. (May 5)
- Gave talking points to AG regarding an email from Mike Parry of Kaua'i asking about vacation rental statistics. (May 5)
- Gave AG talking points in response to another email from Mike Parry of Kaua'i asking about where to find more info on vacation rental statistics. Gave her the link to send to him of HTA's infrastructure section of the website. (May 6)
- Gave AG talking points in response to an email from Cynthia Rubenstein notifying about ThePointsGuy.com telling people about vacationing in Hawai'i but not mentioning the quarantine. Told her to refer this to HVCB which has been contacting travel websites. (May 6)
- Gave KA talking points in response to an email from Tracey Stefanyk asking about who qualifies for an exemption as an essential worker. Told her to send the link to the Governor's 7th supplemental proclamation, along with the email address to request an exemption. (May 7)
- Gave KA talking points in response to an email from Maui-Aloha Weddings hoping to have their address updated on GoHawaii.com. Told her that HVCB manages the site. (May 7)
- Gave AG talking points in response to an email from Mike Parry asking about the Kaua'i 2020 visitor statistics. Told her that people can choose more than one type of accommodation on the form. (May 8)
- Sent John Monahan (JM) and MH an email that was sent to the JIC regarding guidance on operating and managing public pools, hot tubs, and water playgrounds during the pandemic. (May 9)
- Gave AG talking points in response to a sales pitch from Daniel Denys, eventspecialist with Global Travel Marketplace 2020. Told her that HTA is not interested at this time. (May 11)
- Gave AG talking points in response to an email from Mackenzie Shannon asking for a flag. (May 11)
- Gave AG talking points in response to an email from Diane Michael, asking what Hawai'i will be like in the Fall. Told her that we do not know what the situation will be like then. (May 11)
- Gave AG talking points regarding an email from Diane Michael asking for assistance with vacation planning, asking what tour operator picks up in Kīhei. (May 12)
- Gave KA talking points in response to an email from Paula Kelly who is currently in New York and has a home in Haiku, asking about the quarantine. (May 13)
- Called Mokihana Aki and Marcus Reimel to let them know that HTA is cancelling their contracts for social media videos because of the budget cuts. Notified HTA's procurement team. (May 14)

- Upon CT's request, forwarded his concerns to the JIC about the press releases from the Attorney General's office announcing the arrests of people who violate the quarantine order. (May 17)
- Responded to an email from Donne Dawson, state film commissioner, asking for help to convince Gov. Ige to allow the film industry to start up again. (May 17)
- Reviewed draft news release and gave input to Tim Sakahara of the DOT regarding the new passenger declaration form. (May 18)
- Responded to an email from Sen. Glenn Wakai asking about the visitor quarantine and for information regarding a specific address. Connected him with Jennifer Chun (JC). (May 18)
- Gave AG talking points in response to an email from Nadine Morales, who works for a timeshare management company that manages a timeshare on O'ahu, asking if the stay at home order pertains to timeshares. Told her yes at this time, as well as the quarantine order, and sent her the link to the 8th supplemental proclamation. (May 18)
- Gave AG talking points in response to an email from Ray complaining about what he calls a militant unreasonable approach to tourists, saying Hawai'i needs tourists and yet hunts them like criminals. (May 18)
- Gave AG talking points in response to a sales pitch from Ammen Tawfik regarding a proposal for an advanced storage system at beaches. Told her to contact the city, since HTA is not in charge of beaches. (May 18)
- Gave AG talking points in response to an email from Jake Pace who wants to travel to Hawai'i from North Carolina this coming month to see his wife, who's stationed on O'ahu with the Army. (May 18)
- Worked on the HTA PowerPoint presentation for CT and coordinated with HVCB and HLTA and created slides. (May 19)
- Responded to an email from Janelle Saneishi of the Department of Agriculture, who says their office continues to receive calls asking about the human quarantine, when they only handle the animal quarantine, and said the callers say they were referred by HVCB and HTA. Connected her with Bobbie Okamoto of HVCB. (May 19)
- Sent JC details on what people should do if they see a person suspected of violating the quarantine order. (May 19)
- Gave AG talking points in response to an email from Lynne Miyazaki of the city's Foster Botanical Garden asking if she can refuse visitors who don't have a Hawai'i identification. Told her to tell her that residents with a Hawai'i ID are also subject to the quarantine, and returning residents typically are outnumbering visitors on the flights to Hawai'i, and more than 90% of the positive cases are Hawai'i residents. (May 19)
- Gave AG talking points in response to an email from Jon Kuenner addressed to David Arakawa (DA), mistakenly addressing him as HTA executive director. Told her to send it to Carole Hagihara to send it to DA. (May 20)

- Gave AG talking points in response to an email from Suzy Moffett asking if she can rent her house in Kahana for five weeks at Kahana Nui Villa and needed someone to confirm that Kahana is a tourist area. Told her that Kahana is not a tourist area, but if the rental is longer than 30 days then it's not considered as a short-term vacation rental. (May 20)
- Gave AG talking points in response to an email from Tom Frattini asking for help in identifying where a photo was from "a hundred years ago." Told her to tell him to contact the Bishop Museum or other historical experts. (May 20)
- Gave talking points to the JIC regarding an email from Elvira Chiang asking about the process at the airport, and who will be called for follow ups. (May 21)
- Gave talking points to KA in response to an email from Guy Chatterton who says he was told that air travel to Kaua'i is restricted through the end of September. Told her to tell him we don't know that since the situation is fluid and for now it's been extended through the end of June but could be extended again, and to check HTA's website for updates. (May 25)
- Gave KA talking points in response to an email from Chris Sold asking to add his new email address to the distribution list. (May 25)
- Responded to an email from HTA board member David Arakawa (DA) asking why sometimes there are no counts for Kaua'i and Maui. Told him it's because there are sometimes no direct flights from out-of-state to those islands, and that the table in the press release doesn't include interisland flights. (May 25)
- Emailed Dan, Krystal and the COVID-19 communications team email address the Hawai'i Hotels Performance Report and drafted a summary for the Daily News Digest (DND). (May 26)
- Received final videos from Marcus Reimel to close out the social media videos contract and sent KK the links since they were for his programs. (May 26)
- Sent Honolulu Mayor Kirk Caldwell's communications team an advanced copy of the vacation rental report as a courtesy. (May 26)
- Gave Ariana Kwan talking points regarding an email from "P Macs" asking if HTA is monitoring a certain couple's Facebook page. Told her to tell him to contact 911 if he suspects anyone is violating the quarantine and regarding that particular couple, JC they arrived in April so no longer need to be in quarantine. (May 26)
- Gave AG talking points in regards to her question about what a STVR is. Told her that means "short-term vacation rental" of less than 30 days, and to let the person inquiring about vacation rental stats know that the new report is coming out tomorrow. (May 26)
- Emailed Dan, Krystal and COVID-19 communications team email address the Vacation Rental Performance report and wrote a blurb for the DND. (May 27)
- Gave KA talking points in response to an email from DCCA investigator Taylor Horninger asking about short-term vacation rentals, specifically if someone rented one out starting March 25 through 31, if they would have needed to stop on March 26 per the Governor's proclamation. Told him that it wasn't in specific wording by the counties until April 7. (May 27)

- Gave KA talking points in response to questions from Nika Sharp whose 14-year-old son will be traveling unaccompanied to visit his father, who lives in Kona. (May 27)
- Gave AG guidance regarding transit passengers and crew members in response to an email from Schuyler Griffin. (May 27)
- HTA Marketing Standing Committee meeting on Zoom was livestreamed on HTA's Facebook page. Helped answer questions from the public during the meeting on Facebook. (May 27)
- HTA Board meeting on Zoom was livestreamed on HTA's Facebook page. Helped answer questions from the public during the meeting on Facebook. (May 28)
- April 2020 Visitor Statistics press release was issued. Wrote a blurb for the DND. (May 28)
- Transcribed soundbites from Gov. Ige and the mayors' Facebook Live, during which Gov. Ige announced he will be extending the transpacific quarantine past June 30 and plans to make an announcement soon regarding reopening interisland travel. (May 28)
- Virtual meeting with the communications team from the Attorney General's office, DOT, Governor's office, and the DOH regarding the new interisland form (May 29)
- Gave KA talking points in response to an email from Carol Johnson complaining about not getting a refund from Waikīkī Beach Rentals, which she booked a non-refundable reservation for the 'Ilikai Hotel's condominium. Told her to tell her to go through the company she booked through or her credit card company for a refund. (May 29)
- Gave KA talking points in response to an email from Darin Deluca, who's planning to maybe move to Hawai'i in September. Told her to tell him that's too far ahead to know if the quarantine will be in effect but to monitor HTA's website for updates. (May 29)
- Gave KA talking point in response to an email from Marjorie Hunkins or Kīhei Rent A Car, asking what documents people have to show them as proof they completed their quarantine. Told her to tell her they are not given paperwork upon completion of the quarantine, however, they can show their boarding pass for their flight to Hawai'i to prove they arrived at least 14 days earlier. (May 29)
- Responded to an email from DA asking what the exempt category includes in the daily passenger count press releases. (May 30)
- Drafted potential questions for Gov. Ige in preparation for his news conference on June 1 to announce the lifting of the interisland quarantine on June 16. (May 30)

International News Bureau and Other Inquiries

- Germany: Responded to an email from Bernd Schinke asking about their upcoming trip in October. Told him the situation is fluid, so we don't know what the future holds then, and to check HTA's website for updates. (May 3)
- Australia: Responded to David Galea asking for help in getting a refund from Waikīkī Beach Rentals, which is offering a voucher instead of a refund. Told him that for a refund it's best to go through the company he booked through or his credit card company. (May 5)

- Korea: Responded to a Facebook message from Lee Sang Won asking for help in getting a refund. Told him that HTA is not a regulatory agency and that he should go through the company he booked through or his credit card company. (May 10)
- Scotland: Responded to a complaint from Fiona Taylor regarding Gaia Hawai'i at Ala Moana condo-hotel not giving a refund and giving her the runaround. Told her that HTA is not a regulatory agency and to go through the company she booked through or her credit card company. (May 11)
- Australia: Responded to a complaint from David McCormack regarding LLC Realty not giving a refund for a vacation rental at the Pacific Monarch, and instead offered credit for rebooking. Told him that HTA is not a regulatory agency and to go through the company she booked through or his credit card company. (May 11)
- Italy: Responded to an email from Romina Cometti asking if she can come to Hawai'i in August, and what HTA's vision is for the next few months. Told her the situation is fluid and it's up to the Governor to decide whether to lift the quarantine. (May 11)
- New Zealand: Responded to email from Alister Martin asking how to sign up to be on HTA's email list. (May 11)
- Singapore: Responded to email from blogger Isabel Leong of Bel Around the World asking if HTA needs promotion assistance. Forwarded request to HVCB. (May 26)

3. Safety and Security

Visitor Assistance Program (VAP)

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

- **CON 17031** – Visitor Aloha Society of Hawai'i (O'ahu) with total funding of \$370,000 and a contract expiration date of 4/1/2021. The first payment of \$333,000 was processed on April 17, 2020. The final invoice of \$37,000 is due on February 15, 2021.
- **CON 17032** – VASHI – Island of Hawai'i VAP with total funding of \$170,000 and a contract expiration date of 4/1/2021. The first payment of \$153,000 was processed on April 17, 2020. The final invoice of \$17,000 is due on February 15, 2021. An additional supplemental in the amount of \$2,700 with VASHI was made to fund the making of fabric masks for industry partners in order to stop the spread of COVID-19. The \$2,700 was processed on May 14, 2020.
- **CON 17033** – VASK – Kaua'i VAP with total funding of \$55,000 and a contract expiration date of 4/1/2021. The first payment of the amount \$49,500 was processed on May 6, 2020. The final invoice of \$5,500 is due on February 15, 2021.
- **CON 17034** – MVCB – Maui VAP with total funding of \$55,000 and a contract expiration date of 4/1/2021. The first payment of the amount \$49,500 was processed on May 6, 2020. The final invoice of \$5,500 is due on February 15, 2021.

During the month of May:

- Maui County's program handled 5 cases and helped 5 visitors (year-to-date: 64 cases/114 visitors).
- Hawai'i County's program handled 19 cases and provided assistance to 31 visitors (year-to-date: 160 cases/237 visitors).
- City and County of Honolulu's program handled 80 cases and helped 115 visitors (year-to-date: 350 cases/671 visitors).
- Kaua'i County's program handled 3 cases and provided assistance to 3 visitors (year-to-date: 14 cases/37 visitors).

Lifeguard Support Program

The Fiscal Year 2020 agreements for three of the four counties were executed with the dollar amounts remaining the same (\$125,000.00 each) and the match eliminated to facilitate the acquisition of critical rescue equipment. However, due to the COVID-19 crisis, the contracts were rescinded as funds for these programs are no longer available. Once HTA returns to normal funding levels, HTA will revisit these programs and hopefully be able to fund them again in the future.

Waikīkī Camera Program

MOA 19010, which provided the City and County of Honolulu with \$300,000 in funding to purchase security cameras in Waikīkī, was executed and extended on 12/30/19 through a no-cost supplemental agreement. HTA has paid \$270,000.00 towards this project and made the final invoice payment of \$30,000 on April 24, 2020. HTA is not looking to extend this contract.

Ocean Safety Advertising Campaign

HTA, through its contracts with SKYHI MEDIA (CON 18176 S1 - \$108,376.92) and Pacific Media Group (CON 18189 S2 - \$143,006.60), is supporting the displaying of ocean safety videos at airports throughout Hawai'i. These videos run primarily in the baggage claim areas during normal airport operating hours. Both contracts will expire on 6/30/2020 and the agreements were originally planned to be extended to continue showing these videos in Fiscal Year 2020, however due to the COVID-19 pandemic, an extension will no longer be possible as funds for these programs are no longer available. Once normal funding levels are returned, HTA will revisit these programs and hopefully be able to fund them again in the future. Payment for contract 18176 S1 has been made up to March 2020 and payment for contract 18189 S2 has been made up to May 2020.

Snorkel Safety Study

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

Hā'ena Emergency Support

MOAs were executed with DLNR for \$54,860 and with the Kaua'i Police Department (KPD) for \$41,140 which provided officers to support the enforcement of the "no parking" zone along a two-mile stretch of Kūhiō Highway. KPD has been submitting requests for reimbursement. DLNR submitted a request for reimbursement in the amount of \$54,860 and payment was processed on May 20, 2020.

Ho'okaulike

Honolulu Parks Security Cameras - MOA 19194

HTA partnered with the City and County of Honolulu's Department of Parks and Recreation to provide funding of \$204,000 for the installation of 192 surveillance cameras in 13 parks. The MOA has been fully executed, and the work is underway. HTA received and processed the first invoice on September 9, 2019 for \$183,600.00 as per the agreement. Parks and Recreation will provide updates as they move forward. The camera equipment went out to bid in April and the City is working on the camera installation purchasing process. The MOA will expire December 31, 2020.

Hawai'i Island Strategic Plan

MOA 19157 with the County of Hawai'i (\$35,000) was executed to assist in the update of the Hawai'i Island Tourism Strategic Plan (2001-2015). HTA has been working closely with County staff to receive updates on the status of this project. An extension to MOA 19157 has been made, with the new end date of June 30, 2020. The first payment of \$31,500 was processed on April 17, 2020. The final payment of \$3,500 is expected from the vendor in July 2020.

Maui Coral Reef Signage

CON 19169 S1 was fully executed in December 2019 with the Maui Marine Resource Council for the amount \$47,144. The contractor has been working to replace existing signs and create new signs related to the coral reef on Maui. Additionally, the contractor is working with the County on acquiring the necessary permits, including an SMA assessment (possibly a minor SMA permit) and obtaining right of entry to the County park sites, which is contingent on approval of the SMA permit. The contractor requested an additional extension of six months beyond the first extension (6/30/20), due to the time required to work through the County

process. The additional extension request was received by the HTA and a no-cost extension contract was executed on 5/4/20 with the new contract end date being 12/31/20.

COVID-19 Related Projects & Support

Airport Screening:

Since March 26, 2020, HTA has been providing support to the Department of Transportation (DOT) - Airports Division by contracting with companies that have “badged” employees to carry out the screening processes at the arrival gates. These companies include Roberts Hawaii, OmniTrak, Anthology, and Worldwide Flight Services. HTA has been providing support at the airports in Honolulu, Kahului and Kona. HTA’s support for the screening mission, as of May 2020, totals \$612,720.

Passenger Form Scanning:

Since March 26, 2020, HTA has been scanning documents at the Daniel K. Inouye International Airport in Honolulu. This has been done in partnership with SMS and the DOT - Airports Division. HTA staff were provided a room at the airport and SMS was able to relocate its scanning equipment and personnel to this location in support of this mission. Forms are collected from arriving flights and scanned into a database. The data is then utilized to support HTA’s call center operations and serves as a critical link to enforcement partners tasked with enforcing the 14-day self-quarantine order. Neighbor island forms are collected daily and sent to Honolulu for processing. HTA’s support for the scanning mission, as of May 2020, totals \$250,561.

Call Center:

Since March 26, 2020, HTA has been supporting the operation of a call center. Originally it was established to contact arriving visitors as part of the State’s efforts related to the self-quarantine order. HTA reached out to the Hawai’i Visitors and Convention Bureau (HVCB) for assistance and HVCB has been taking the lead in managing the call center’s day-to-day activities. Special thanks to Barbara Okamoto (Bobbie) for her assistance with this important project. As of May, there are more than 85 individuals trained to make calls 7 days a week.

HTA, thanks to the hard work of Kalani Ka’anā’anā, has been utilizing a cloud-based PBX system (Grasshopper) to allow call agents to connect and make calls using their own phones routed through the PBX system. This has meant that we do not have to provide individuals with equipment. The data is provided to the call center agents using Microsoft Teams. Jennifer Chun has played a critical role in getting the data into a format that makes sense and is usable by the agents. The HTA engaged Esri to develop a more secure and scalable geodatabase through their ArcGIS platform. Data is now entering the ArcGIS database and is provided to state and county partners as part of our ongoing support of the COVID-19 mission.

In late April, it was determined that returning residents should also be included in the contact activities of the call center. On April 24, 2020, the DOT began assisting the HTA with this process by making calls to residents and providing more than 20 call center agents to support the process.

In May, the HTA determined that the existing call center operation was neither efficient or sustainable and began searching for a technological solution that would improve the efficiency and effectiveness of the program. The use of automated technology to make calls was identified as the most effective solution. Numerous cloud-based solutions were explored and, after an extensive process, a vendor 8x8 was selected based on cost, technology, and the proven ability to deliver a product that would meet or exceed the needs of the mission. It is anticipated that the solution will be launched mid-June.

Call Center Metrics:

	Voice Mails / Calls / Ratio	Hangups / Calls / Ratio	Faxes / Calls / Ratio	Voice calls / Calls / Ratio
May	1,838 / 23,864 / 8%	2,167 / 23,864 / 9%	1 / 23,864 / 0%	19,824 / 23,864 / 83%
April	550 / 12,868 / 4%	912 / 12,868 / 7%	0 / 12,868 / 0%	11,404 / 12,868 / 89%
March	21 / 269 / 8%	42 / 269 / 16%	0 / 269 / 0%	205 / 269 / 76%

	Inbound Minutes	Outbound Minutes	Total Minutes	Avg. Call Length
May	84679:14	63653:34	148332:48	1:42
April	24,062:05	19,019:58	43,082:03	1:46
March	367:25	245:34	612:59	1:16

Other Related Projects:

There are numerous other projects that HTA is involved in, including the support of the Safe Travels application's first phase, the ESRI/ArcGIS database enhancement and others.

Digital Data Collection Tool (Interisland):

As the HTA was diligently working on its database enhancement project for the CONUS, we were asked by Governor Ige to provide assistance with moving from a paper-based form process to a digital data collection tool as part of the lifting of the 14-day interisland travel quarantine. Since May 28, 2020, we have been leading the effort to develop the necessary infrastructure and tool to efficiently collect information from interisland passengers as part of the Department of Health's overall mission.

The digital data collection tool was available and ready to be utilized as of Friday, June 12, 2020. It was determined by the Governor to hold off on launching the tool until sometime after the June 16, 2020 lifting date and that paper forms would be utilized. We are waiting for DOT-Airports to provide us with a date to train their screening team on how to use the tool.

In addition, we were asked by Governor Ige to expand this digital data collection tool to be used in the CONUS and International flight arrival process. We are waiting for an estimate and project scope from Esri.

IV. BRAND MARKETING PILLAR

MMA Contracts

Due to the COVID-19 pandemic, 2020 contracts for Europe and Southeast Asia markets have been cancelled, effective April 17, 2020. On April 9, RFP 21-04 Europe MMA was cancelled due to changing fiscal priorities in response to the COVID-19 crisis. RFP 21-05 Oceania MMA remains in effect with proposal submission deadline changed to June 30, 2020 through RFP Addendum 2.

MMA Marketing Plans

The Market Management team is ensuring that the focus of “Responsible Tourism” is thread through the marketing plans from HTA’s Global Marketing Team (GMT). This action runs parallel to HTA’s brand marketing, and thus Hawai’i will be set up well to welcome the next generation of travelers who are already conscious of and respect destinations that care for their natural resources. The team has updated the Brand Management Plan (BMP) templates and GMT BMPs for 2021 are due to HTA on June 30, 2020.

Since mid-March, Hawai’i was impacted by the 14-day quarantine for all incoming passengers, and the stay-at-home orders due to the COVID-19 global pandemic. As a result, HTA instructed its GMT partners to stay dark. All advertising initiatives have been halted. As the stay-at-home order increased globally, the GMTs increased the opportunity for educational webinars and other interactive training about each island’s treasures and Hawai’i overall.

The Market Managers also worked with the GMTs to receive updates on the development of how each country was dealing with and adapting to the coronavirus spread. HTA continued to conduct conference calls with the airlines, including Hawaiian Airlines, Alaska Airlines, Japan Airlines, All Nippon Airways, Qantas, Southwest Airlines, WestJet, Air Canada and Air New Zealand, to discuss their plans and start-up strategy with continual safety protocol top-of-mind, from on-boarding, to during the flight and during the off-boarding process.

HTA is now in discussions regarding the 2021 budget for Branding programs. Due to COVID-19, HTA will not be receiving TAT funding. The 14-day quarantine for all passengers arriving to the state remains in place. Until the quarantine is lifted, HTA and the GMTs are discouraging vacationers from traveling to Hawai’i. In 2021, HTA’s budget will drop by 44.5%. The Branding budget for 2020 was \$51,561,050. At this time, the 2021 Branding budget stands at \$28,590,675. HTA received approval from its Board of Directors to terminate contracts for China and Taiwan, effective January 1, 2021. These country’s expenditures are considerably less than the five countries that HTA will continue to focus on through the GMTs – U.S., Japan, Canada, Oceania and Korea. HTA’s funding situation remains fluid and there may come a time when RFPs can be reissued for China, Taiwan, Europe and Southeast Asia.

Industry Partners Meetings

The HTA Marketing team held meetings with industry partners over two days in February. In attendance were representatives from various hotels, airlines, wholesalers, land operators, transportation companies, and event creation companies. The discussions included topics such as responsible tourism, sustainability, single-use plastic, HTA’s four pillars, key marketing objectives, brand positioning, key performance indicators and resources on HTA’s web site. The meetings gave the marketing team an opportunity to understand Hawai’i’s industry partner needs and how we can work together and assist them and each other. As the meetings were well received, we plan to have additional meetings quarterly.

Due to COVID-19, the 2nd quarter Industry Partner Meeting has been postponed. However, HTA continues to communicate with its industry partners by providing COVID-19 related information daily.

HTA is now considering the possibility of conducting a virtual Zoom meeting for industry partners or potentially a virtual Fall Tourism Conference. These talks are still in its preliminary stages.

China Summit

Due to the global COVID-19 situation, HTA's China Summit has been canceled.

GMT Hawai'i Coalition

The GMT Hawai'i Coalition meeting between all GMTs, Island Chapter representatives and HTA has been canceled due to the global COVID-19 situation.

Communication

There have been concerns about COVID-19's impact on tourism. HTA has been communicating with its industry partners, providing up-to-date information from the Department of Health, all press conferences, arrivals and other data during this fluid time.

As the 14-day quarantine and stay-at-home orders were instituted, HTA's message evolved to, "this is not the time to travel" in order to protect Hawai'i's residents and prevent the spread of COVID-19. This message became stronger with the closure of hotels, parks, beaches and activities. Presently the 14-day quarantine and stay-at-home orders are in effect through June 30, 2020.

HTA has a committee called MĀLAMA with primary discussions focused on a recovery plan with the most important voice being the residents.

V. TOURISM RESEARCH

The Tourism Research Division (TRD) issued the April 2020 monthly visitor statistics on May 28, 2020, including monthly arrivals by country, category expenditures for major markets, and monthly visitor characteristics for each major market area.

TRD posted Seat Outlook data tables for June 2020 through August 2020 to the Infrastructure Research Section of the HTA website.

State, major market and island fact sheets were updated with the April 2020 data and posted to the Board site. State and market fact sheets were published on the website.

TRD issued the April 2020 Hawai'i Hotel Performance Report on May 26, 2020. The report and related April 2020 data tables were posted to the Infrastructure Research section of the HTA website. The Hawai'i Hotel Performance Report is produced using hotel survey data compiled by STR, Inc., the largest survey of its kind in Hawai'i.

The Fourth Quarter 2019 Visitor Satisfaction and Activity report (VSAT) and infographics were published on May 29, 2020 to the Visitor Satisfaction and Activity section of the HTA website.

The 2018 Year End Marketing Effectiveness Report prepared by OmniTrak was posted to the Other Research Section of the HTA website on May 29, 2020.

Beginning with May 5, 2020 data, TRD started publishing a new weekly report called Hawai'i YouGov Destination Brand Index for U.S., Japan, and Australia. These reports are posted on the Other Research section of the HTA website. HTA subscribes to YouGov's BrandIndex and Profiles databases for U.S., Japan, and Australia. YouGov has a global consumer panel with over 6 million participants in 42 countries who take over 20 million surveys each year. 10,000 consumers are surveyed each day. HTA receives access to new data each week. YouGov has daily brand tracking metrics – media-focused, brand health, purchase/intent and consumer status.

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

TRD assists in preparing the HTA Daily Tourism Brief which is posted on the COVID-19 (Novel Coronavirus) alert page on the HTA website.

TRD assists with the mandatory 14-day quarantine, including daily cleaning, manual ascription, and tabulation of State of Hawai'i Department of Agriculture Plant and Animal Declaration Form (Ag Form) data and Mandatory Travel Declaration Form; managing the scanning of forms at Daniel K. Inouye International Airport (HNL); scanning and organizing the Order for Self-Quarantine; supporting calls to visitors, intended residents, and residents; supporting DBEDT's tabulation of the Interisland Declaration Form; supporting escalations to law enforcement, and providing traveler information to counties and HI-EMA.

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

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

VI. ADMINISTRATIVE

Contracts List

A list of contracts executed in the month of May is attached.

Hawai'i Visitors & Convention Bureau (USA) 2020 Monthly Leisure Marketing Report – May

Market Intelligence/Market Conditions

Economy

The economic impact of the coronavirus pandemic continues to evolve as markets begin reopening. Comerica Bank U.S. Economic Outlook data released in the last week of May confirms expectations for a historic hit to Q2 GDP as Q2 consumer spending got off to a rocky start. The volatility that was seen in the U.S. economy in March, April and May was unprecedented in the modern era.

After historic job losses in April, May employment data showed a net gain of 2.51 million payroll jobs for the month. The unemployment rate declined from 14.7 percent in April, to 13.3 percent in May. The stronger-than-expected labor data for May builds expectations for a strong June as well. Initial claims for unemployment insurance have now declined for nine straight weeks since peaking at 6.9 million in late March, reaching 1.9 million for the week ending May 30. Continuing claims increased by 649,000, to hit 21.5 million for the week ending May 23.

- The Conference Board *Consumer Confidence Index* held steady in May, following a decrease in April. The Index now stands at 86.6 (1985=100) versus 85.7 in April.
- The *Present Situation Index* – based on consumers' assessment of current business and labor market conditions – decreased from 73.0 to 71.1.
- The *Expectations Index* – based on consumers' short-term outlook for income, business and labor market conditions – improved from 94.3 in April to 96.9 this month.

Following two months of rapid decline, the free-fall in Confidence stopped in May," says Lynn Franco, Senior Director of Economic Indicators at The Conference Board. "The severe and widespread impact of COVID-19 has been mostly reflected in the Present Situation Index, which has plummeted nearly 100 points since the onset of the pandemic. Short-term expectations moderately increased as the gradual re-opening of the economy helped improve consumers' spirits. However, consumers remain concerned about their financial prospects.

Outbound Travel Market

- Pleasant Holidays has added a new Traveler Support page to its website, offering travel advisors resources for information and assistance during this crisis. The page includes links to current information resources on enhanced Health & Safety Protocols for 60 key hotel chains, airlines and cruise lines, destination reopening news, and travel protection plans, including cancel-for-any reason options. They are also offering a \$250/booking rebooking discount that helps travel advisors convert a cancelled booking into a new vacation.

Competitive Environment

- IATA and ICAO Council approved *Takeoff: Guidance for Air Travel through the COVID-19 Public Health Crisis*. This is an authoritative and comprehensive framework of risk-based temporary measures for air transport operations during the COVID-19 crisis. "The universal implementation of

global standards has made aviation safe. A similar approach is critical in this crisis so that we can safely restore air connectivity as borders and economies re-open. The *Takeoff* guidance document was built with the best expertise of government and industry. Airlines strongly support it. Now we are counting on governments to implement the recommendations quickly, because the world wants to travel again and needs airlines to play a key role in the economic recovery. And we must do this with global harmonization and mutual recognition of efforts to earn the confidence of travelers and air transport workers,” said Alexandre de Juniac, IATA’s Director General and CEO.

- Royal Caribbean Cruises Ltd. canceled 130 sailings during the first quarter of 2020 after ceasing operations in mid-March due to the outbreak of COVID-19, prompting the cruise giant to report a net loss of \$1.4 billion for the year’s opening quarter compared to net income of \$249.7 million in the first quarter of 2019. Royal Caribbean executives also confirmed that the company will extend its temporary suspension of global cruise operations through July 31, apart from its China business.
- The World Travel & Tourism Council (WTTC) has launched the world’s first ever global safety and hygiene stamp. The specially designed stamp will allow travelers to recognize governments and businesses around the world which have adopted health and hygiene global standardized protocols – so consumers can experience ‘Safe Travels.’ This move by WTTC represents the global Travel & Tourism private sector, has also received the backing of the influential United Nations World Tourism Organization (UNWTO). Eligible businesses such as hotels, restaurants, airlines, cruise lines, tour operators, restaurants, outdoor shopping, transportation and airports, will be able to use the stamp once the health and hygiene protocols, outlined by WTTC, have been implemented. Destinations will also help to award the stamp of approval to local suppliers. Gloria Guevara, WTTC President & CEO, said: “We are delighted that UNWTO is supporting the private sector global protocols and our efforts as public-private collaboration is critical to ensure a faster recovery.”

Consumer Trends

- **Life after Lockdown** - Announcements lifting the current lockdown restrictions have raised spirits, stock markets and hope, but that does not mean consumers are going to be heading back to life as normal. Marketers should be prepared for a blended new normal—one that mixes in new habits created during the lockdown. These are the major categories most likely to see huge shifts in behavior and new trends. Marketers need to be prepared for changes within:
 - Consumption pattern changes
 - Recessionary consumer shifts
 - Constraints on travel for work and leisure
 - E-commerce and digital interaction expectations of every brand
 - News and real-time information ubiquity

Typically, there is a bell curve when it comes to the adoption of new methods, technology and other changes in society. COVID-19, however, forced the entire country to adopt new habits all at once and for a prolonged yet unknown length of time.

Trends

- **Changes in brand behavior** - Across all industries and networks, a few industries increased their sent message volume during this time, especially health care and media and entertainment, both of which have become top of mind as people seek out reliable updates for news on the pandemic, and in the case of entertainment, look for everything from distraction to inspiration during social distancing. On the other hand, some industries had a sharper decline in published posts during this

time, particularly sports and travel, both of which have been highly impacted due to suspensions of activity and restrictions on business as normal. Retail, consumer goods, and education sent messages also dropped, though less dramatically.

- **User-generated content takes center stage** - Brands like Walmart, Lowe’s, and UPS leveraged user- and employee-generated content during the onset of the COVID-19 crisis. This was done to show a more “human and authentic” voice of the brand with more realistic visual content that is unfiltered and less “produced.”

Airlift - May 27, 2020 HTA Airline Seat Capacity Outlook for June-August 2020. The forecast for scheduled nonstop air seats to Hawai‘i during this period will decrease by -32.1 percent as compared with the same time period of 2019. The projection is based on flights appearing in *Diio Mi* airline schedules as of May 2020. Because of the COVID-19 outbreak, the decrease in scheduled air seats is expected to occur in all major market areas including U.S. West (-28.9%) and U.S. East (-54.2%). The situation is being monitored daily and the forecast adjusted accordingly.

Market Intelligence/Market Conditions Impact on Hawai‘i Travel

- With the extension of Governor Ige’s mandatory 14-day quarantine for air travel to Hawai‘i through June 31, the impacts of COVID-19 continue to affect travel to Hawai‘i. In May, the counts were consistently over 200 a day and continue to rise as additional flights are added.

Leisure Activity Update

Consumer

Digital Campaign May – Estimated Impressions Per Island

PARTNERS	Central	OVB	MVCB	KVB	IHVB	LVB	DMVB
Programmatic	-	46,500	367,500	612,500	735,000	122,500	147,000
Search	-	6,666	5,000	8,333	10,000	1,666	1,666
Total	-	53,166	372,500	620,833	745,000	124,166	148,666

- Paid media has been paused. Nothing to report.

Travel Trade

- Paid trade media – May
 - *Affiliate Program** (*TravAlliance*), 2,181 imp, Affiliate Program Homepage Marquee, Feb-Dec.
 - *TravAlliance**, 25,000 impressions, dedicated email, May 12.
 - *Northstar**, 13,000 impressions, enewsletter, May 7.

*Affiliate Program – annual media buy that began pre-COVID and, contractually, unable to cancel.

Public Relations

- HVCB
 - To support Governor David Ige's Emergency Rules Order and extension of the mandatory 14-day travel quarantine, HVCB's PR team assisted with:
 - Drafting and disseminating letters to U.S. travel trade professionals, leisure publications, editors and freelance journalists requesting they refrain from publishing any stories about Hawai'i that might encourage people to travel to the islands. Press trips and individual media visits are still postponed to responsibly ensure the safety of visitors and residents alike.
 - Drafting and disseminating letters to airlines and OTAs to communicate the extension of this order through June 30, 2020, the restrictions and tracking mechanisms in place to enforce the order and a request for support from the airlines and OTAs to help mitigate non-essential travel to the islands.
 - As a result of HVCB's Ka Wai Ola press trip in February, Ramsey Quebin produced a story in *Nerd Wallet* titled, "Re-create Travel Memories With These Hotel Souvenirs – And Earn Points, Too." He mentioned Waikīkī Beachcomber by Outrigger to experience Hawai'i through Zak Noyle's "extreme surf" photography to look back at your favorite travel memories and find inspiration when it is safe to travel again.
 - Media coverage highlights:
 - "Re-create Travel Memories With These Hotel Souvenirs – And Earn Points, Too." – *Nerd Wallet* – Ramsey Quebin – May 13, 2020
- KVB
 - Kaua'i was featured in the following May media:
 - *Real Simple* (2,265,102 uvpm, circ. 1,984,226), as a result of KVB's New York City media blitz in March 2020.
- OVB
 - O'ahu was featured in the following May publications and websites:
 - *Travel Weekly Australia* (24,824 uvpm). Coverage was result of an OVB news release in April. "Aloha from Afar: How to Experience Oahu at Home" highlights the Pearl Harbor Historic Sites, Wildside Specialty Tours, Sea Life Park, Chef Chai, ESPACIO Waikīkī, etc.
 - *Luxegetaways* (uvpm N/A). Coverage was a result of an OVB news release in April 2020. The article, "10 LOCALIZED TRAVEL EXPERIENCES TO ENJOY FROM HOME," features the Halekūlani and Halepuna Waikīkī.
 - Liaised 2 media in May.
- MVCB
 - Maui was featured in the following May publications and websites:
 - *Miami Living Magazine* (audience 32,000), "Maui, the Unforgettable Valley Isle."
 - *Links* (43,500 uvpm), "A Free-to-Play Golf Course in Paradise."
- IHVB
 - The Island of Hawai'i was featured in the following May media:
 - *Travel+Leisure* (2,395,366 uvpm), "I was Stranded in Hawaii by Coronavirus-the Magical Islands Completely Stole my Heart," May 9, clip resulted from hosting Brad Japhe on the Island of Hawai'i in March.
 - "2020 IRONMAN World Championship in Kona Postponed Due to COVID-19", May 14 and 15, resulted from providing quote for event's postponement press release and was published in:

- *Big Island Video News* (audience 16,308), May 14
- *Big Island Now* (audience 43,734), May 14
- *Slowtwitch* (audience 43,734), May 14
- *West Hawai'i Today* (circ. 7,976), May 15
- *West Hawai'i Today* (audience 53,542), May 15
- *Hawai'i Tribune-Herald* (circ. 16,000), May 15
- *Hawai'i Tribune-Herald* (audience 35,592), May 15
- Liaised with 7 media in May.

Sales Activities

Sales Calls, Trade Shows, Training Events

	Wholesaler/TA/TO/OTA	Other	Total
HVCB	-	5	5
KVB	-	-	-
OVB	-	-	-
MVCB	2	-	2
IHVB	-	-	-

Summary of Key Sales Activities

- HVCB
 - Due to the ongoing COVID-19 pandemic, travel trade training events were cancelled or postponed for the month of May. The team has adapted to support key HTA initiatives as well as initiate projects to prepare for when Hawai'i reopens to travelers.
 - HVCB directors, managers, coordinators and Island Chapters have been assisting with the HTA "Hotel/Quarantine" calls and the HTA "Hotels for Heroes" initiative.
 - Communications were sent to all wholesale and consortia partners reinforcing the 14-day quarantine and requesting partners make the quarantine message more prominent on their websites.
 - An email was deployed to the travel agent database reinforcing the 14-day quarantine message and encouraging engagement in HVCB's certification programs.
 - Quarantine messaging was incorporated into the agent website education page and was made more prominent on the homepage of *agents.gohawaii.com*.
 - Conducted calls with Questex to explore the opportunity of a custom virtual ExperienceCast/Expo in place of the live August Sales Blitz events. This format would allow for more attendees at reduced cost incorporating live speakers, recorded presentations, partner participation, live chat, videos and download of collateral pieces. Questex would handle all promotions and technical aspects. Link to event would live on three different platforms for advisor access six months post launch.
 - Proceeded with next steps to implement a database cleanse and ongoing maintenance with TA Connect to ensure contacts are up to date.
 - Continued updating the Hawai'i Destination Specialist (HDS) live workshop and all-island update presentation.
 - Worked with MMGY on a revised media plan and updated creative focused on promoting education.
 - The team continued work on an audit of the travel trade website *agents.gohawaii.com*.
 - Travel advisors continued to be engaged with the online Hawai'i Destination Specialist certification courses and Island Specialist certifications. There were 1,279 online graduates for the month of May via *agents.gohawaii.com*.

- HVCB participated in the NorCal 'Ohana virtual meeting on May 13 and a Midwest 'Ohana virtual meeting on May 15 with Hawai'i wholesale and hotel partner members.
- HVCB conducted a webinar in partnership with Classic Vacations for 855 advisors with IntelTravel on May 14.
- HVCB presented to 10 advisors with Forest Travel Agency through a Zoom webinar on May 15.
- HVCB partnered with Pleasant Holidays to conduct a webinar for 27 advisors with Xstream Virtual Vacations on May 21.
- Pleasant Holidays provided the opportunity to conduct a webinar for their Business Development Managers on May 12.
- In partnership with ALG and Highgate Hotels, HVCB conducted a Hawai'i webinar on May 29 for 300 travel advisors.

Key Performance Indicators - Leisure Market

Consumer

Digital Campaign April Actuals – Estimated Impressions Per Island

PARTNERS	Central	OVB	MVCB	KVB	IHVB	LVB	DMVB
Programmatic	-	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
Search	-	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED	PAUSED
Total	-	0	0	0	0	0	0

Public Relations

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

Impressions and Publicity Values for April

APRIL	Impressions	Publicity Values
Print	91,712,909	\$17,371,664.22
Online	25,094,073,186	\$11,912,181.45
Broadcast	299,016,253	\$15,339,092.05
Total	25,484,802,348	\$44,622,937.72

Countermeasures

- HVCB outreached to industry partners to ensure they were informed about Governor Ige's extension of the travel quarantine through June 30. Communications included personal emails from John Monahan to airline and OTA executives that requested further support to inform potential guests and those who still chose to visit Hawai'i about the extension and subsequent 14-day quarantine. Information also was sent to travel professionals who comprise HVCB's Hawai'i Destination Specialist list. Ongoing communications occurred with media, MCI customers and clients, and consumers who requested information about the status of the destination.

Responsible Tourism Update

- Hawaiian Culture/Natural Resources
 - HVCB
 - Due to COVID-19 concerns, no emails promoting travel to the islands were sent.

- Community
 - HVCB
 - Due to COVID-19 concerns, no emails promoting travel to the islands were sent.
 - **#ShareAloha.** In an unprecedented time for Hawai'i, when the local community needs to stay safe, and visitors need to stay home, communications have been shifted to address a new COVID-induced landscape. Messaging to the U.S. source market reflects the sentiment that while it is just not the right time to visit Hawai'i now, Hawai'i looks forward to welcoming you in the future with the spirit of *aloha* that it is renowned for. Several initiatives were launched to convey this pivot in messaging. In May, **#ShareAloha** utilized social media to support organic efforts and widen audience reach on *Facebook*, *Instagram* and *YouTube*. It shared a video message of *aloha* when people need it the most: "While you can't visit us right now, we want to share the spirit of *aloha* from afar to help you cope during this unprecedented time. While we look forward to welcoming you in the future, let's care for each other for the time being."
 - All Island Chapters are assisting with the quarantine-related efforts from staffing the visitor hotline from 9:00 am-9:00 pm, collecting and forwarding agricultural forms and Orders for Self-Quarantine forms, and staffing the quarantine call team that is calling every visitor and intended resident arriving to monitor their adherence to quarantine stipulations.
 - KVB
 - In response to the current pandemic, Executive Director Sue Kanoho has been working daily with the Kaua'i Emergency Management Agency Office in cooperation with the County of Kaua'i's Mayor and Mayor's office, Kaua'i Police Department and other state and county officials and organizations. In addition, she chairs the Tourism Subcommittee for the Kaua'i Mayor's Economic Recovery Strategy team to assist in establishing a plan to reopen the island while keeping the community safe.

"Coming Attractions" for Leisure Market

HVCB Travel Trade Calendar Update: All travel events for the month of May were either cancelled or postponed. The team is working closely with industry partners and the calendar will be updated as information becomes available. The following events are all subject to cancellation depending on continued developments in COVID-19 pandemic mitigation efforts.

	What	When	Where
HVCB	Virtual Training w/Pleasant Holidays (AK, CO, ID, MT, UT, WA & WY)	June 9-11	Virtual
	Delaware ASTA Trade Show	June 23 & 25	Virtual
	Altour Webinar	June 2 & 4	Virtual
	Cruise Planners Webinar	June 17	Virtual
	KHM Webinar	June 19	Virtual

Hawai'i Tourism Japan

2020 Monthly Leisure Marketing Report – May

Market Intelligence/Market Conditions

Economy

- The Japanese economy has entered a technical recession with two consecutive quarters of decline from the COVID-19 pandemic. The pandemic has caused all sectors of the Japanese economy to decline. Significant impact was seen in the automotive sector as exports declined from the drop in international trade. Consumption also took a significant hit as consumers refrained from leaving their homes, compounded with the tax hike in October 2019.
- Bankruptcies related to COVID-19 have reached 200, with the most originating from Tokyo at 43, followed by Hokkaido at 17. By industry, the hotel industry accounted for 39, followed by restaurants at 24. Total bankruptcies have also been growing each month with 16.4% growth in April, recording a double digit increase for two consecutive months.

Outbound Travel Market

- The UNWTO announced their “Tourism Recovery Technical Assistant Package” to revitalize the global tourism sector from COVID-19. It is structured around three main pillars: economic recovery, marketing / promotion and institutional strengthening with resilience building. The package aims to support governments, the private sector and donor agencies as they face the socio-economic crisis. For marketing and promotion in the travel sector, they have suggested the reevaluation of strategies and diversification of products.
- UNWTO has also raised 3 potential scenarios for the tourism industry in 2020. The first assumes that travel restrictions are gradually lifted from July, resulting in a 58% decline of international travelers for 2020. The second pushes back the lifting of travel restrictions to September, resulting in a 70% decline. The final delays lifting of restrictions to December, resulting in a 78% decline.
- The World Travel & Tourism Council outlined what the “new normal” will look like as travels begin to resume. In it, they state that public-private collaboration between governments and businesses will be vital to form new health protocols which will form the travel experiences and provide people with reassurance when traveling. The formation of this “new normal” will emerge as travels resume, and last until mass production of an effective vaccine becomes available.
- The Japan Association of Travel Agents (JATA) announced guidelines to mitigate COVID-19 for the travel industry. The guidelines broadly call for employees to maintain distance with customers, limit the number of customers in stores, require the wearing of face masks, frequent disinfection and calling for awareness from both staff and their customers.

Competitive Environment

- European countries are beginning to implement initiatives to restart their tourism industry. Countries such as Spain, Italy and Greece where tourism supported a significant portion of the economy, have officially announced intents and/or plans to reopen to tourism. Reopening of borders will be phased in, starting from domestic travels, followed by travels within the EU, and eventually international travels. Spain has announced that they intend to begin accepting international travelers as early as July.

- With over 200 countries and regions having enforced travel restrictions, various tourism bureaus and DMOs have launched various campaigns and initiatives allowing consumers to enjoy their country from their homes. Some examples include HTJ's "Hawai'i from home" campaign, Great Britain, France and Switzerland's virtual tour initiatives, Australia's "live from Australia" contents and Brand USA's enhancing of contents found on their official GoUSA TV app.
- The Tourism Authority of Thailand, in collaboration with public and private sector partners introduced the "Amazing Thailand Safety and Health Administration" certification, aimed at elevating their industry standards and improving confidence of domestic and international travelers.

Consumer Trends

- The Japanese Ministry of Finance's study on household consumption in March found that travel related expenses declined by 65%. Expenses for international travel at the 48 major Japanese travel agencies declined by an unprecedented 85%.
- Booking.com initiated studies on popular destinations for consumers after COVID-19 subsides utilizing countries that consumers added to their "wishlist" feature in March and April. Domestic destinations were most popular, holding over half of the shares. For international destinations, Hawai'i ranked at third, after Korea and Thailand.
- Expedia performed a similar search engine study from 4/1 to 4/30 on popular destinations that consumers searched for. Amongst all destinations, Oahu ranked 1st, along with the Island of Hawai'i also ranking within the top 10, indicating consumers' interest in traveling to Hawai'i.
- Millennial market focused consumer studies on travel sentiment by Tripadvisor found that over 70% of potential travelers indicated desire to travel as soon as COVID-19 subsides. The most popular destination amongst this segment was Hawai'i.
- Studies on consumer sentiment in May found that compared with pre-COVID-19, consumers felt that they had regained roughly half of their freedom within their everyday lives. 63.9% of consumers also continued to feel uncertainty for their livelihood. Many habits have also changed with 91% consumers responding that they have refrained from eating out, and 59.5% of consumers reporting that they continue to refrain from leaving their homes for nonessential business. Some respondents also stated that they will continue to take precautions even when the pandemic subsides as threats will continue to linger.

Travel Trends

- Tours utilizing virtual reality are rising in popularity as COVID-19 devastates the tourism industry globally. One format is whereby a tour guide offers tours of destinations utilizing Google Street View. This originated from a special request made by a client of a certified guide in London, receiving highly positive response from customers. Other companies have begun adopting these trends, with Lonely Planet launching an app allowing users to virtually experience hiking in the Appalachian Mountains and Tripadvisor launching a #RoamFromHome campaign, offering over 100 unique online experiences.
- As the demand and need for cleanliness standards increases globally, Booking.com worked with housekeeping platform Properly to pilot a program to enforce quality and safety standards to aid

rentals in their recovery. The program is designed to improve the scores of properties that do not meet the minimum threshold for being listed on Booking.com.

Media Trends

- YouTube is rising greatly in popularity as a media platform. Popular YouTubers, along with popular channels have been featuring celebrities within content uploaded, garnering a great deal of attention from consumers.
- The COVID-19 pandemic is causing difficulties throughout the media industry. Fashion related media are finding difficulties in selling advertisement slots as overall consumption dropped. Additionally, editors are finding it difficult to travel for photoshoots, forcing them to cancel some issues. Various media have also begun shifting to providing contents online.
- Research conducted by Grill found that the amount of advertisements dropped by 60% in April year over year. Many marketing company representatives have expressed that they will be reallocating budget towards online platforms and to continue searching for ways to enhance exposures.

Airlift

- Suspension of direct flights between Japan and Hawai'i continue. ANA, JAL and AirAsia X have announced suspension of services through 6/30. Delta has announced suspension of service through 7/1 or 7/2, dependent on the route. Hawaiian Airlines has announced suspension of services through at least 7/1, with the suspension of their Shin-Chitose (Hokkaido) – Honolulu service through 7/19. United Airlines has announced suspension through 8/3. Korean Air has announced suspension of services through 8/31 with potential to resume services earlier, depending on when the mandatory 14-day quarantine is lifted.
- The Scheduled Airlines Association and the All Japan Airport Terminal Association announced guidelines to mitigate COVID-19 for the aviation industry. Measures are broadly similar to the guidelines announced by JATA, along with industry specific measures such as the limiting of conversations during flights and to not offer options for in-flight meals to limit service time.
- The IATA announced that they expect overall travel demand will not return to pre-COVID-19 levels until 2024. They indicated the various quarantine measures being enforced in various countries will continue to make travelers refrain from traveling across borders. They cited their survey studies which found that 86% of travelers were wary of quarantine measures, and that 69% would not travel if a form of quarantine measure is enforced. They urged governments to explore alternative methods to ensure safety other than 14-day quarantines, raising examples such as the implementation of pre-flight health screenings and tracking systems.

Market Intelligence/Market Conditions Impact on Hawai'i Travel

As COVID-19 began to show signs of slowing down in Japan, the state of emergency declaration was lifted on 5/25 for all regions of Japan. Although the declarations were lifted, effects continued to linger amongst consumers and businesses alike as many consumers continued to refrain from leaving their homes for nonessential business and some companies continued to implement remote work to avoid the 3 Cs of closed spaces, crowds and close-contact settings. The government has also announced that the emergency declaration will be reinstated if a spike is seen in the cases of COVID-19 as the economy gradually opens up.

Although the Japanese populace has been resilient through numerous natural disasters and the like, the COVID-19 outbreak has created an unprecedented environment whereby people were spending more amount of time at home as schools and offices closed or implemented remote programs. As people found it difficult to communicate and enjoy time together with one another, travel has been raised as one activity they would like to engage in when COVID-19 subsides. As the government phases in reopening of the economy, domestic travels will recover first, followed by international travels. However, as consumers remain wary of the risks posed by COVID-19, it is likely that they will favor outdoor travels filled with nature while avoiding congested areas and urban centers. Bearing such factors in mind, Hawai'i has great potential as it is a destination filled with nature and open spaces throughout all of the Hawaiian Islands.

Activity Update

Travel Trade

- Final decisions were made to cancel all 5 of the planned physical Hawai'i Expo events. As a substitute, HTJ is making arrangements to move the event to a virtual online format. In May, HTJ held meetings with various companies offering platforms to initiate such events.
- Travel agencies have extended cancellation of international tours. Most travel agencies have extended cancellation for products to Hawai'i and Micronesia through 7/15 with other destinations through 7/31.
- Most travel agencies have continued to shutter retail outlets throughout May, with much of their staff on temporary leave. Although some have begun resumption of retail outlets as of June, irregular operations such as the staggering of shifts is expected to continue.
- Although plans for creation of tours incorporating safety protocols for COVID-19 have begun to be raised, they remain in preliminary stages.
- The resumption of services by airlines not being announced is making it difficult for travel agencies to strategize beginning sales of products.

Aloha Program

- Significant growth in the number of general consumers and travel agents taking the Aloha Program exams was maintained in May as many people continued to have to stay and/or work from home. A total 4,048 travel agents and 415 general consumers took the examinations in May.
- To leverage the opportunity of travel agents and consumers alike spending more time at home, HTJ proactively introduced new contents within the Aloha Program website. In May, a total 26 new columns relating to history, culture, music and events were posted. Starting in June, webinars to introduce Hawaiian culture and local lifestyle will be broadcasted on a weekly basis to provide an opportunity to experience Hawai'i virtually.

Public Relations

- Continued the "Ouchi de Hawai'i" (Hawai'i from home) campaign which initially launched in April as part of phase 1 recovery initiatives. In May, a new category of "Hawai'i with your family" was added to the preexisting 6 categories. This category aims to introduce contents that consumers can enjoy

with their family such as the provision of coloring books and introduction of partner entities' unique family oriented programs. For further details on the campaign, please refer to the supplemental attachment.

- HTJ conducted a SNS campaign from 5/8 – 5/30 to increase awareness of the “Ouchi de Hawai’i” campaign by encouraging consumers to share photos of Hawai’i from their past trips to Hawai’i. Many of the captions shared with the photos included those stating their desire to travel to Hawai’i again and how they miss the destination.
- A new email magazine on the “Ouchi de Hawai’i” campaign was sent to 366,340 consumers on 5/22. Contents included updates on tourism in Hawai’i, an introduction of family oriented contents within the campaign, download links for new virtual background photos and information on the KizunAloha campaign. Opening rates for the magazine was 23.6%, with click-through rates of 5.8%.
- Throughout May, HTJ continued to update information for the “Ouchi de Hawai’i” campaign, along with updates on COVID-19 within allhawaii.jp. HTJ also collected information from partners regarding the safety protocols they will be implementing. This information will be shared in June within the allhawaii portal site.
- Japanese TV stations, radio stations and online media have been extensively covering topics on “from home” initiatives by many destinations. The “Ouchi de Hawai’i” campaign of HTJ was also introduced on various media such as a morning news show, Sunday radio program, etc. From April to May, the campaign achieved a total 130 exposures with 4,016,132,401 impressions and AVE of \$592,581.98.
- HTJ launched a consumer travel sentiment study on their views regarding travel to Hawai’i from 4/17 – 5/31 and received a total 11,705 responses. The study found that most consumers wished to travel to Hawai’i again from 2022 or later at 31.6%, followed by June 2021 onwards at 21.6%. Conversely, 18.3% of respondents also indicated that they would like to travel to Hawai’i again from as early as this Fall. By frequency of travels, 43% of heavy repeaters (those who have visited over 20 times) indicated that they would like to travel by Fall of this year, indicating that repeat travelers are more inclined to travel as soon as possible.
- HTJ worked with a popular long-running Japanese TV program, “Sekai Fushigi Hakken” to feature Hawai’i through surfing and the Hokulea on 5/23. Some of the contents introduced included the origin of surfing in Hawai’i, the story of Duke Kahanamoku, an introduction of the surfing exhibit at the Bishop Museum and an introduction to the Hokulea. Numerous positive responses from consumers were seen on SNS stating how they were moved by the stories and how they found it valuable to be able to learn about a deeper side of Hawai’i. The show has reach of 22,332,898 with AVE of \$1,901,300.
- Performed major maintenance within the consumer knowledge bank system. Further developments were made to the Broll system and worked with HVCB to update the Japanese version of the metadata within the system.
- Continued preparations for the launch of the surfing promotion website, aimed to promote the sport’s deep historic and cultural ties to Hawai’i. The website is planned for launch in the Summer under the allhawaii.jp portal site.

Sales Activities

Sales Calls

Airline	Wholesaler/TA/TO/OTA	Other	Total
6	25	53	84

Travel Agents:

- Most travel agencies continued to suspend much of their operations through May. Although discussions for implementation of safety protocols for COVID-19 have been discussed, detailed outlines have not been finalized.
- Lifting of the mandatory 14-day quarantine in Hawai'i will be the most important point for resuming tours to Hawai'i. This will allow for airlines to resume services, followed by the capability to organize tours again.
- Travel agencies predict that airlines will only resume 60 – 80% of services by Winter, making it difficult for travel agencies to accurately forecast and schedule future products.

JTB

- Staff are to work from home through 5/31, causing operations to be at a near standstill.
- The issuance of safety guidelines by the Japan Association of Travel Agents has prompted JTB to begin creation of their own iteration.
- Even if tours are possible to resume in July, as airlines will be phasing in resumption of services, they predict it will take a significantly longer duration for demand to return to levels seen in 2019. Significant recovery is not being predicted to occur until 2021.
- As a company, they will initially focus on recovery of domestic travels. Amongst all international destinations, they would like to focus the most on Hawai'i.

HIS

- Staff are to work from home through 5/31 and will gradually be phasing in the reopening of retail outlets starting in June.
- Although planning of some recovery campaigns had begun, as the amount of direct flight seats between Japan and Hawai'i remain unknown, they have temporarily suspended the campaigns.
- Initial focus will be placed on the millennial female market.
- New bookings continue to be sluggish, with roughly just 30 made in Osaka, resulting in 1 new booking per day. In May, this slightly grew to roughly 5 new bookings per day.

JALPAK

- A new website was launched by JALPAK where information on Hawai'i is regularly updated.

Partner Relations

- HTJ conducted the Japan Sub-committee and Attraction Partners meetings on 5/20 via online conference. Over 35 representatives participated in the meetings and were shared about the

current situation of the Japanese market including the travel trade industry, governmental initiatives to combat COVID-19 and situation with airlines. Each of the attending representatives also shared on their current conditions under COVID-19 and potential post-COVID-19 initiatives.

- HTJ participated in the Japan Hawai'i Travel Association's meeting held on 5/21 via online conference with close to 50 representatives. At the meeting, HTJ shared about the current market conditions, along with the "Ouchi de Hawai'i" (Hawai'i from home) recovery campaign initiatives.

Responsible Tourism Update

- Began meetings with the Japanese crew of the Hokulea to develop educational programs. Additionally, translation for the Japanese version of the Hokulea documentary which HTJ has been working with the crew on is nearing completion.
- Discussed with Bishop Museum for launching the online membership support project set to launch in November.

Hawai'i Tourism Canada

2020 Monthly Leisure Marketing Report – May

Market Intelligence/Market Conditions

Economy

- The Canadian economy is reeling as the impacts of the COVID-19 pandemic ravage consumer and business spending and cratering oil prices have put a halt to the expected rebound in the energy sector.
- The economy came to a near-halt at the end of last year. Growth has not been much better in the first quarter and is set to contract in the second. Overall, we expect real GDP to decrease by 6% this year before bouncing back with 2.5 percent growth in 2021.
- Exports and non-residential business investment are expected to fall this year.
- The Bank of Canada has responded to the deteriorating economic outlook in an unprecedented way. In a period of just over one week, the Bank slashed its overnight rate by 100 basis points.
- Lower interest rates will throw more fuel onto the fire that is Canada's housing market, leading to a strong increase in resale home prices and residential investment this year.
- Encouragingly, given the historically tight labor markets and the short-term nature of the economic shocks, businesses are expected to retain workers as much as they can, and employment should recover along with the economy.
- While late March recorded significant rate declines, the national ADR in \$USD rose 2.8 during the first quarter of 2020; a 4.1% increase in the relative rate in \$CAD.
- The unemployment rate went from a historic low of 5.7% to 13.7 in the past six months due to the COVID-19.

Outbound Travel Market

Following two months of growth, outbound travel declined in March as the COVID-19 pandemic was declared. During the quarter, Canadians made almost 8 overnight trips to the U.S. and other destinations, an annual decrease of 9.5%. Of the recorded trips, an estimated 6.1 million were for leisure purposes. The partial month of border restrictions and travel advisories resulted in a loss of 1.1 million overnight trips in March alone. Compared to 2019, overseas trips during the month decreased 30.8% and transborder trips fell 32.2%.

Canadians made 4.2 million overnight trips to the U.S. during the first quarter of 2020, compared to 4.7 million in 2019. During the period, overnight auto trips increased in Jan and Feb, but fell 28 per cent in March. At the same time, travel by other modes decreased 37 per cent in March. During the month, almost all the tracked cities recorded declines in air arrivals as COVID-19 began to spread and seat capacity was reduced.

Compared to the first four months of 2019, Canadian arrivals in Hawai'i recorded a -41% drop in 2020. Throughout the period, direct arrivals fell -41% while indirect arrivals decreased -43%. Following minimal declines in Jan and Feb, arrivals fell by 105 thousand in March and April due to travel restrictions associated with COVID-19.

Competitive Environment

After falling -19.9 percent in Jan and Feb, the Asia-Pacific region recorded another significant drop in arrivals in March. Overall, there were 624 thousand Canadian arrivals in key destinations in the Asia/Pacific region throughout the first quarter of 2020, a 41.6 per cent drop in visitation compared to the same period in 2019.

There were a little more than 2.0 million Canadian arrivals in destinations in Mexico, the Caribbean, and Central America throughout the first quarter of 2020. A significant reduction in activity in March resulted in a 14.4 per cent decrease so far in 2020. In March alone, arrivals in Mexico fell by 166 thousand, visits to Cuba decreased by 75 thousand, and there were 49 thousand fewer trips to the Dominican Republic. The region saw almost 3.1 million arrivals throughout the first five months of the winter 2019-20 travel season, an 8.2 per cent decrease compared to the previous winter.

Consumer Trends

After posting the largest monthly decline ever recorded in March, then falling to its lowest level ever in April, the consumer confidence index is starting to move in a more positive direction. Overall, the national index score increased to 63.7 points in May. While still below March levels, consumer confidence rose in every region with Atlantic Canada posting the largest monthly increase. Overall, Canadians are a bit more optimistic about future economic and job market conditions though the ratings remain well below the levels reported a few months ago suggesting that consumers will remain cautious with their spending in the short-term.

Travel Trends

The results of the latest Travel Intentions Survey (conducted from April 9 to April 16, 2020) by the Conference Board of Canada confirm that travel intentions have fallen significantly from last year. The share of respondents planning to take one or more overnight trips away from home for vacation or leisure purposes between May 1 and October 31 is 46.4 percent, down significantly from the 79.3% who intended to take a trip at the same time last year. The share of respondents who said they did not intend to take, or were unsure about taking, an overnight trip was 53.6%, up from 20.7% last year.

Media Trends

In 2019, eMarketer predicted daily media consumption would flatten at 9 hours, 50 minutes for the coming years. Now, Canadian consumption of media per day is expected to rise to 10 hours and 24 minutes. The rise in average time spent is expected to fall back closer to initial projections through 2022, indicating that new habits will stick around in the near future.

Digital's share of total media time will accelerate as traditional formats with the exception of TV – take a hit during the pandemic. Digital now accounts for 53.3% of total media time spent in Canada. TV will increase by 10 minutes in 2020 but is expected to return to a downward trajectory post-pandemic with Print and Radio being hit the hardest.

Print will decline further in 2020. Among traditional media formats, it was already on the steepest decline and distribution challenges will accelerate that decline. Digital formats allow for much quicker information and no risk of virus transmission. Print time spent for 2020 will fall to 17 minutes/day. Radio consumption will dip due to a pause in commuting. It will decline by 10.5% this year to 1 hour and 20 minutes daily bringing the total listeners from 25.4M to 24.8M.

Despite annual declines, TV remains strong, reaching 92.5% of the adult population – up 1.6% from last year due to COVID-19. Consumers have turned to a blend of TV and digital video for long-form content. Canadians 18+ will spend 5 hours tuning in, 65% of which is TV. Over-the-top (OTT) streaming services account for a large portion of video. More than 20 million people have a subscription (Netflix, Disney+, etc.) which is expected to be higher due to the pandemic.

Time spent on mobile in 2020 will account for more than a third of all media time (33.8%). The 23 extra minutes are largely a result of video, social networking and messaging during self-isolation. Like other formats, mobile internet time in 2020 will spike due to COVID-19. It will gain 23 minutes and sustain roughly the same amount of consumption over the next few years.

Airlift

- Carriers are currently reporting a 6% increase in capacity for the latter half of 2020.
- While carriers are currently reporting a small uptick in service for the latter half of the year, total direct capacity in 2020 is estimated to decline 23% to 372 thousand seats.
- Poor economic conditions and subdued demand due to the pandemic is expected to result in an estimated 348 thousand visitors, a 35% decrease compared to 2019.
- Route reductions in March and April due to COVID-19 resulted in a 26% decline in direct capacity throughout the winter 2019-20 travel season.
- Both Air Canada (-33.1%) and WestJet (-21.8%%) reduced direct service, resulting in 102 thousand fewer seats.
- Travel restrictions and the decline in service resulted in 271 thousand visitors overall, a decrease of -30% compared to the previous winter.
- While the bulk of the decrease in capacity and visitation occurred in March and April, the first four months of the winter season registered a -5.0% drop in arrivals.
- Both Air Canada (-29%) and WestJet (-33%) are reporting reductions in direct service throughout the summer travel season (May-Oct).
- In all, carriers are expected to offer 34 thousand fewer seats this summer, a 31% drop YOY.

Market Intelligence/Market Conditions Impact on Hawai'i Travel

Canadian economy has been severely affected as a consequence of the COVID-19 lockdown. Oil prices have recovered giving the Loonie more power to make front to this pandemic. The Canadian Federal Government has developed measures to counteract the impact of the economic crisis in Canadian homes.

- Prime Minister Justin Trudeau announced more measures to support businesses and young Canadians taking a financial hit from the global pandemic
- 4.5 million Canadians have applied for government assistance as a result of lay-offs and reduced work hours.
- Canada's six largest banks are reducing interest rates on credit cards by about half and are allowing deferment of payments for up to six months.
- The Bank of Canada's interest rate is now at 0.25%.
- Applications for the CERB (Canada Emergency Response Benefit) payments to eligible Canadians who lost income because of COVID-19 began this week. The emergency funding program, which offers eligible applicants \$2,000 a month for a period of up to four months, is just one of the measures the Canadian government has launched to try and buoy families and businesses feeling the fallout of the virus.
- Businesses and non-profit organizations that see a drop of at least 30 per cent in revenue due to COVID-19 will qualify for the government's 75 per cent wage subsidy program. The program could mean payments of up to \$847 a week — and the prime minister encouraged businesses to top up their employee wages with the remaining 25 per cent of their salaries.
- Travellers returning to Canada MUST self-isolate for 14 days due to Canada's Quarantine Act (put in place March 26).
- Several Canadian provinces have set up checkpoints at their borders to restrict traffic, VIA Rail has suspended train service on the "Canadian" between Toronto and Vancouver and anyone in Canada showing symptoms related to COVID-19 is barred from boarding domestic flights and trains.
- Ferries and essential passenger vessel operators have reduced the maximum number of passengers carried on board by half. Transport Canada says operators will also implement alternative practices to reduce the spread of the virus, such as keeping people in their vehicles. These measures will be in place until at least June 3.
- The Canadian border remains closed and only citizens and permanent residents are currently allowed into the country until late July. Direct relatives of citizens and permanent residents are allowed in the country with a quarantine period of 14 days since June 4.

Leisure Activity Update

Consumer

No consumer activity has been developed during May due to COVID-19. Approved posts from the HTA have been the only activity in the Canadian social networks of HTCana.

Travel Trade

HTCAN had a successful experience at the TravelBrands first Virtual Expo. The innovative expo offered the opportunity to engage with more than 2,300 travel advisors. The platform was easy to navigate and allowed direct chats with travel agents. Hawai'i's videos and travel brochures were available to view and download on the platform. Most agents shared their love for Hawai'i. HTCAN received many questions regarding COVID-19. Agents want to know when their clients will be able to travel to Hawai'i. Also, how the authorities and industry partners will implement safety plans. The event is now available on-demand and will continue to be marketed to those who didn't attend the live event. 1,069 agents visited the Hawaiian Islands booth.

During the last months travelers and their travel advisors have had to cancel, rebook, and often rebook again their vacations due to the COVID-19 crisis. Travel protection have been one of the

most debated topics by travelers in Canada. Travel advisors are now looking for policies that specifically includes cancellation or medical coverage in the event their clients contract COVID-19 or are quarantined. Most travel insurance providers stopped covering losses related to COVID-19 as early as January 21, but some companies are now providing the opportunity to purchase policies that include cancellation coverage if they contract COVID-19 or are quarantined or Cancel for Any Reason (CFAR) coverage.

HTCanada is working with Globus Family of Brands to host a webinar on June 16th about the State and Globus’s products in it, for destination education purposes.

Public Relations

- Ongoing media outreach to keep Hawai'i top of mind when it's time to travel.
- Proactive and reactive pitching with prior approvals from HTA. Pitching themes mainly are virtual experiences that can be done from the safety of your homes.
- All individual press trips have been cancelled for the rest of 2020.

Sales Activities

Airline	Wholesaler/TA/TO/OTA	Other	Total
2	10	1	13

Responsible Tourism Update

Hawaiian Culture

The proposed cultural webinar for HTCAN is postponed until further notice, once HTA has come out of contingency mode regarding COVID-19 epidemic.

Nature Resources

HTCAN tries to minimize its environmental impact, a large effort is made to encourage agents to use digital materials instead of printed. Also, HTCAN has made sure that all the branded promotional items are either recyclable, made of recycled materials and/or are biodegradable.

Community

Nothing new to report.

Island Chapters Engagement Update

HTCAN is organizing a series of 6 webinars with Spoiled Agent which will include individual island presentations and one on Hawaiian Culture.

“Coming Attractions” for Leisure Market

What	When	Where
Spoiled Agent Webinars	TBC	

Hawai'i Tourism Oceania

2020 Monthly Leisure Marketing Report – May

Market Intelligence/Market Conditions

Economy

Australia

Australia has flattened the curve of COVID-19, from a peak infection growth rate of nearly 25% in mid-March to less than 1% in May. At the end of month, there were 7,171 cases and 102 fatalities reported. Most new cases reported continue to be residents returning from overseas, who are required to enter a mandatory, supervised two weeks in quarantine. Australia has one of the highest testing rates in the world, with over 1.5 million tests carried out and the government's contact tracing app has been downloaded by more than six million Australians.

The federal government announced a three-step roadmap to be rolled out between May and July for easing social and business restrictions. The economy is slowly restarting with restaurants, retail and other non-essential services opening with social distancing rules in place. New South Wales and Victoria are the only states allowing interstate travel; all other states are maintaining closed borders.

GDP figures show the economy shrank by 0.3% in the March quarter. This makes it certain that Australia will enter its first recession in nearly 30 years, as the full impact of COVID-19 shutdowns have occurred during the current June quarter. The unemployment rate increased from 5.2% to 6.2% in April, however is probably higher as this figure only takes into account those actively looking for work. Positively, the Australian dollar continues to strengthen as China's economy rebounds, and it starts to buy Australia's mineral resources. In the past two months it has jumped 24% in value against the US\$. At the end of May, the AU\$ was trading at US\$0.67.

New Zealand

New Zealand's decision to act quickly and strictly around a full lockdown and closing of borders appears to have paid off. With quite dire forecasts for the spread of COVID back in March, the country was able to tame this at a peak of 1500 cases and 22 deaths and to date there are now no active cases in New Zealand. This has meant that the economy can restart with most businesses and services back operating. The only exception being the outbound tourism industry. The strict border closing approach will mean that re-opening borders will be tackled cautiously. Initially there are talks with Australia and the South Pacific (many who have had no cases).

Even though the economy has restarted, there is a heavy reliance on inbound tourism and thus the economy is forecasted to enter a recession. The New Zealand dollar has fared well and is trading at US\$0.65.

Outbound Travel Market

Australia

With international borders remaining closed, there is zero outbound tourism to report on. The only international flights operating are for repatriation of Australian citizens, and some essential travel such as military and medical reasons.

New Zealand

With the closing of borders in the middle of March, outbound tourism reduced to close to zero during April and May. The only exception were some essential travel requirements, and repatriation (in both directions).

Competitive Environment

Australia & New Zealand

- Australia and New Zealand are working closely to implement a trans-Tasman travel bubble, allowing travel without the need for a 14-day quarantine. Reports suggest travel between the two countries may start as early as July.
- Fiji has publicly stated that it wants to be part of Australia's trans-Tasman bubble with New Zealand. Fiji's borders are closed until the end of June, however the country is preparing protocols for inclusion once Australia's borders reopen.
- Tourism Australia's domestic campaign launched. 'Live from Australia' reconnects Australians with their own country and encourages people to plan their next holiday with virtual tours of experiences from around the country.
- Tourism New Zealand is also focusing on the domestic market until borders start opening.

Consumer Trends

Australia & New Zealand

Research by the Tourism & Transport Forum on Australians' travel intentions finds that two in five people would like to travel overseas within 12 months. Another marketing survey of 350 Australians asked what would influence their destination choices in the future. 50% cited the number of COVID-19 cases as a key consideration and half also said the health and safety protocols of the operator or accommodation provider would also influence booking decisions. (Source:AWA)

Travel Trends

Australia & New Zealand

While Virgin Australia is in voluntary administration, the administrators have sought proposals from interested purchasers. A shortlist of two final bidders has been selected with the successful bidder to be announced at the end of June. During this period, Virgin continues to operate a reduced domestic schedule.

Media Trends

Australia & New Zealand

Publisher of Sydney Morning Herald, Nine, has suspended some of its print sections, non-weekly magazines and lift outs. The paper's weekend 'Traveller' lift out has been suspended, as well as the 'Sophisticated Traveller' magazine. Dozens of regional newspapers that print syndicated travel stories have stopped operating.

Airlift (Specific to Hawai'i)

Australia

- Qantas and Jetstar have suspended all international flights from the end of March to a new revised date of at least the end of July. Qantas is still operating some repatriation flights.

- Hawaiian Airlines suspended all flights from Australia on March 22 with an estimated resumption date (at this stage) of August 2.

New Zealand

Air New Zealand has been criticized for not providing refunds to all passengers. Instead they have been offering flight credits, with some exceptions depending on the market. Air NZ have advised that they just can't afford to provide everyone refunds until the business starts recovering. Recovery has at least begun in the domestic market with a demand from Kiwis to see more of their country.

Market Intelligence/Market Conditions Impact on Hawai'i Travel

Australia & New Zealand

The current uncertainty and ban on all international travel will affect intention to travel and bookings for the foreseeable future. Forward bookings have stopped, and airlines are issuing credits for cancelled flights. Travel is slowly resuming at an intra-state and domestic level. There is no date yet for international travel, however anticipated for a stage resumption in Q4.

Leisure Activity Update

Travel Trade

- **Lei Day Trade Communications:** To celebrate lei day and show our support, HTO sent out the following trade communications to our partners.
 - Trade eDM to our travel agent database - 9,067 subscribers
 - An email message to our Hawaii and trade industry partners – 305 partners
 - Aloha Friday content which highlighted lei day, the #sharealoha video, content on Hawaiian Culture and 'virtual' initiatives.
- **Aloha Fridays:** HTO has an Aloha Friday section that provides Hawai'i updates and information to the travel trade in the below trade publications. This month, Aloha Friday celebrated lei day and Hawaiian culture.
 - Travel Weekly (AU): Featured via a monthly Aloha Friday section distributed digitally to 14,000+ travel professionals. HTO has reduced the frequency of Aloha Fridays from every two weeks to monthly.
 - Travel Daily (AU): Full page feature monthly, reaching 35,000 industry professionals.
 - Travel Today (NZ): Weekly Aloha Friday section which is promoted to 2,500 industry partners.

Public Relations

As per HTA's instructions, HTO has paused all public relations activity. Although HTO ceased proactive media outreach, some Hawai'i content was published by various outlets. There are also some news stories about the impact of the crisis on Hawai'i's economy and how it is managing the crisis through enforced quarantine measures.

Sales Activities

Sales Calls (Please list # of calls only without company names)

Airline	Wholesaler/TA/TO/OTA	Other	Total
3	0	1	4

Zoom calls have taken place with various trade partners including Brand USA, Air NZ, HA and Qantas. Email correspondence has also been maintained, with sensitivity to partners who may have been furloughed.

Responsible Tourism Update

HTO are continuing to play a role in the expanded Sea Cleaners initiative.

Hawai'i Tourism China

2020 Monthly Leisure Marketing Report – May

Market Intelligence/Market Conditions

- **Currency:** In May, the Chinese Yuan weakened against the USD from 7.05 to 7.13.
- **Unemployment rate:** As of April 2020, the unemployment rate in China reached 6%, compared to 5.0% in April 2019.
- **Consumer Price Index:** In April 2020, the Consumer Price Index was 103.3%, increase of 3.3% year on year.

Outbound Travel Market

- China's domestic corporate travel market has restored approximately 20%-30% of its normal scale so far, according to Trip.com. Chinese business travel market declined 90% in the wake of COVID-19, but the sector has gradually returned to business since March. China had a business travel market worth of RMB 2.8 trillion (USD 394 billion) in 2019, but only 10% of the businesses were served by professional corporate management companies.
- Didi Chuxing, the biggest ride-sharing platform in China, has invested RMB 50 million (USD 7 million) in starting an international travel agency based in Beijing. The travel agency will provide services covering domestic travel, inbound tours, tour information consultancy, ticket sales and others.
- Alibaba's travel brand, Fliggy, stated that it has hosted more than 25,000 travel live streams to more than 70 million viewers since February 2020. It now plans to hire travel influencers from more than 30 countries to showcase destinations worldwide with more than 100 live-streaming sessions a day.
- OTAs are still major booking platforms for domestic business travel, with a penetration rate of 70.1%. TMCs are popular in China's first-tier cities, while a mix of OTAs, airlines/hotel direct channels and traditional travel agencies dominate the lower-tier markets.
- Due to COVID-19, TravelDaily postponed the "2020 TravelDaily Conference & Digital Travel Show" from September 27-29 to November 25-27, at the Shanghai International Convention Center. ITB China, the largest B2B international travel trade show in China, will join Travel Daily in co-organizing the event. The TravelDaily Conference, a global leading travel industry event, has been held for 12 years in a row. This year's event is projected to have more than 1,300 midrange and senior executives in the travel industry to participate, representing major airlines, hotels, OTAs, tourist attractions, tourism boards, ticketing agents, cruises, car-rental firms and investment companies from China and the rest of the world.

Competitive Environment

- Maldives announced it will open border to foreign visitors from July 1, 2020.
- UK will reopen their visa centers in Beijing, Shanghai, Guangzhou and Chongqing on July 1, 2020.

- Japan has extended their ban on foreign national visitors from entering the country if they are from or visited a list of 73 countries two weeks prior to their visit to Japan through May 31, 2020.
- Greece government announced that it will welcome visitors from June 15, 2020.
- Island of Tahiti, Fiji, Australia, New Zealand, Maldives, Switzerland and Brand USA has posted regularly on their social media channels.

Consumer Trends

- Business Review released an article which summarized 5 new consuming trends. They are as follows:
 - 1) 3 km consumption circle: this reflects the rise of the home to home business market, with food delivery, service, fresh food, flowers, office supplies, home repair, etc.
 - 2) China trendy brands: the younger generation is taking greater pride with national trendy Chinese brands.
 - 3) Group buy: the new e-commerce platform Pinduoduo(拼多多) is becoming more and more popular, it leads a trend of group buying, which will benefit consumers to enjoy lower prices with good quality. This is especially true for consumers in China's less-developed urban centers and rural areas and they are driving the next wave of consumption growth in the country.
 - 4) Influencing consumption: the consuming behavior research conducted by Accenture shows that more than 80% of consumers would like to share their shopping experiences and among them, 55% consumers will share their experiences on social apps, and these consumers will easily stimulate repeat sales through a "purchase - share - repurchase" circle. Livestreaming, vlog/short videos, and product reviews are the tools of the influencing trend.
 - 5) Upscale consumption: the new middle-class is the driving force. With the rise of upscale e-commerce platforms such as Easenet, JD, MI and Taobao, the high-quality, high-power consumption group is the main target. Currently, the overall upscale e-commerce accounts for the overall e-commerce market share is still considered to be very small but will be an area that has much growth and opportunity with additional years of branding recognition and awareness.

Travel Trends

- Trip.com released the May Holiday travel consumption trend report. It was reported that 115 million people travelled during May 1-5, which contributed CNY 47.56 billion revenue. Chengdu, Sanya and Shanghai were the top 3 cities visited. Over half of the travelers were born after 1990. Hiking, outdoor, RV, off-road, camping, and travel photography are the leaders in in online browsing and bookings in the "May Day" theme tour products. For the May holiday, travelers were required to follow the motto, "No appointment, no travel" to prevent overcrowding, practice social distancing and ensure a mainstream, high-quality and safe travel. Self-driving has become an important choice for many tourists, with contactless online car rental becoming a popular choice.

- Approximately 93% of Chinese conduct their transactions with digital payments. Industry stakeholders should review these important trends and look for contactless solutions in their business, especially in light of the pandemic.

Media Trends

- Live streaming continues to be strong as a method for on-line product sales. Trip.com had conducted a series of successful live streaming episodes hosted by its president, James Liang, in selling travel products to different regions. Direct to Consumer platforms is becoming increasingly important.

Airlift

- Beijing plans to continue to severely restrict international flights until at least October due to the coronavirus pandemic according to Chinese media. While domestic Chinese air traffic has returned to half of its pre-crisis level, the air traffic authority is maintaining restrictions on flights from abroad.

Leisure Activity Update

Consumer

- No news to report.

Travel Trade

- HTC has been working on the B2C and B2B mini programs and will populate the content and translations using existing information from the gohawaii.com and meet.hawaii.com
- In the month of May, HTC continued to keep contact with the travel trade including Jinjiang Travel, Jianfa Travel, Tongcheng, and Dianpiing.com

Public Relations / Media Activities

- No news to report.

Sales Activities

Sales Calls

Airline	Wholesaler/TA/TO/OTA	Other	Total
0	4	0	4

Responsible Tourism Update

- No news to report.

Island Chapters Engagement Update

- No news to report.

“Coming Attractions” for Leisure Market

- All consumer activities were suspended due to COVID-19 since February 2020. HTC will be focused on communication, education and support with news related to COVID-19 to the Chinese.

Hawai'i Tourism Korea

2020 Monthly Leisure Marketing Report – May

Market Intelligence/Market Conditions

Economy

- South Korea’s nominal GDP in 2019 was \$1.64 trillion, ranking 10th among 38 OECD member countries and marking its first slide since the 2008 global financial crisis, according to OECD on May 27.
- The South Korean government finalized the country’s single-largest supplementary budget worth 35.3 trillion won (\$29 billion) on June 3, marking its third set of extra fiscal spending due to the Covid-19 pandemic. The amount surpasses the previous extra budgets. The country approved a 28.4 trillion won extra budget in 2009 for the global financial crisis and 13.9 trillion won in 1998, shortly after the Asian financial crisis.
- South Korea's emergency relief funds have started to boost private consumption, lifting the revenue of small merchants in the first week of payouts from the one-off aid program. An index gauging the average sales of small merchants hit 100 in the second week of May, the same as in the previous year, said Korea Credit Data (KCD), a provider of sales management platforms to small firms. The data was tallied based on consumers' card spending.
- Statistics Korea said consumer prices fell 0.3% year-on-year in May due mostly to a plunge in oil prices and increased government welfare spending. Prices of groceries rose sharply as shopping habits were affected by the pandemic.
- South Korea's exports dropped 23.7% to US\$34.8 billion in May for the third consecutive month, compared with \$45.7 billion posted a year earlier, Ministry of Trade, Industry and Energy data showed.
- The number of jobless South Koreans hit a record high in the first four months of 2020, mainly due to the pandemic. Around 2.08 million people were unemployed in the January-April period, the largest number since data tracking started in 2000.
- The average USD/WON exchange rate in May was 1,230.54 won, a slight increase from the previous rate of 1,223.06 won in April. South Korean airlines will not apply fuel surcharges on international routes in May to reflect falling oil prices.

Outbound Travel Market

- The number of outbound travelers plummeted by a whopping 98.6% to 31,425 pax in April, compared with 2,246,417 pax in the same period last year, Korea Tourism Organization (KTO) reported. Air passenger traffic for the U.S. plunged 93.7% to 6,417 pax, 21.8% of all outbound trips during April.

Month	Departures	Growth (%)
January	2,513,030	-13.7%
February	1,046,779	-60.0%

March	143,366	-93.9%
April	31,425	-98.6%
Total	3,734,600	-63.1%

- South Korea has extended a special worldwide travel advisory due to Covid-19. The advisory was issued on March 23 for all Koreans' overseas trips to all countries and regions, and will be extended to June 19.
- South Korea's transport ministry will not reclaim traffic rights that are unused by airlines this year due to flight suspensions caused by the pandemic. Slots allocated for aircraft arrivals and departures will be preserved. Aviation laws require airlines to surrender traffic rights if they are not used for more than 20 weeks in a given year and relinquish slots if less than 80% of them are used. The government has also taken steps to cut airport landing charges by 20% for two months from March and exempt airlines from parking charges for three months from May.

Competitive Environment

- Guam will reopen for visitors from South Korea, Japan and Taiwan from July 1 and won't apply a mandatory 14-day quarantine, Governor Lou Leon Guerrero announced on May 27.
- Northern Mariana Islands will reopen to tourists from July 15. Marianas Visitors Authority, Saipan Chamber of Commerce, the Hotel Association of Northern Mariana Islands, and business leaders in the CNMI have agreed on a phased approach to resuming economic activity while preserving public safety.
- Greece will start welcoming foreign visitors on June 15 from 29 designated countries, including most of Europe, South Korea, Japan, and China. International flights also will be able to land in Thessaloniki, the country's second-largest city. Passengers from all other countries will still need to get tested, stay overnight at specific hotels, and quarantine for either seven or 14 days.
- Lufthansa German Airlines advised it will resume services from Incheon to Munich with three weekly flights from June 24 as European countries start easing entry restrictions on incoming passengers from June 15.
- KLM Royal Dutch Airlines continued providing a reduced service from Incheon to Amsterdam during the pandemic but on June 2 increased the number of flights from three to five a week.
- Finland-based national carrier Finnair will resume Incheon-Helsinki services from July 1 following the country's lifting of travel restriction on South Korea. The airline said facemasks will be mandatory for all passengers on all Finnair flights until at least end of August.

Consumer Trends

- Consumer sentiment in South Korea slightly rebounded in May on the slowdown in Covid-19 infection cases, according to Bank of Korea (BOK) data. The country's composite consumer sentiment index (CCSI) rose to 77.6 in May, up 6.8 points from April when it dropped to its lowest level since December 2008. (A reading below 100 means pessimists outnumber optimists.)
- Retail sales in South Korea rose 3.9% year-on-year in April on the back of rising consumer demand for online platforms as more people refrained from going out. Ministry of Trade, Industry and Energy

data showed the combined sales of 26 major offline and online retailers reached US\$8.74 billion (KRW 10.8 trillion) in April, up from US\$8.66 billion (KRW 10.4 trillion) a year earlier.

- Consumption patterns shifted markedly during Q1 as Covid-19 began its rapid spread in South Korea. More people opted to stay home to ensure social distancing, leading to skyrocketing sales for noodles and ready-made meals, called home meal replacements (HMRs) in Korea. The domestic leader in HMRs, CJ CheilJedang, a CJ Group food business affiliate, reported net profit increased by a year-on-year 743.2% to \$356 million in Q1.

Travel Trends

- Asiana Airlines restarted flights on 13 international routes — one to Seattle and 12 to Chinese cities, such as Beijing and Shanghai — from June 1. It also increased the number of flights on six other routes to cities like Frankfurt, Hanoi and Ho Chi Minh City. The services will help to raise Asiana's flight utilization rate to 17% in June from 8% a month earlier.
- South Korea's low-cost carriers are also moving to restart their international services. Jeju Air, the country's largest LCC by sales, resumed Incheon to Manila flights once a week from June 6. KE's affiliate budget carrier, Jin Air, restarted flights on five international routes from Incheon to Bangkok, Taipei, Narita, Osaka and Vietnam on June 1. It operates one to two flights a week to the five cities from June to also meet cargo demand. Air Busan, Asiana Airlines' other budget carrier, plans to sell tickets at a promotion price to prepare for resumption of international services in July.
- Passenger traffic on domestic airline routes in South Korea plunged to 1.35 million pax in April, down 22% from 1.74 million a month earlier, reported Air Portal, an aviation data provider run by Korea Civil Aviation Association. The April figure marked the lowest level of passengers carried since January 1997. It is also sharply down from 10.63 million passengers on domestic routes in January. Meanwhile, from May 1-17, the number of domestic air travelers jumped 55% to 1.04 million from 8,143 in the same period in April.

Media Trends

- Online shopping jumped 12.5% from a year earlier in April as the Covid-19 pandemic prompted consumers to buy more goods via e-commerce platforms. The value of online transactions for the month was 12.26 trillion won (US\$9.98 billion), up 1.3 trillion won (US\$1.08 billion) from the same month last year, according to Statistics Korea data released on June 3. The increase followed a 11.8% year-on-year gain in March.
- Global video streaming platform Netflix is estimated to have signed record-high subscriptions in April due to the pandemic. An estimated 2 million viewers in South Korea presumably paid US\$35.5 million for subscriptions, up 21% from US\$30.1 million in March, according to industry tracker WiseApp.
- As the public health crisis caused people to move about less and sapped consumer demand for new gadgets, South Korean smartphone sales plunged 18% quarter-on-quarter in Q1. According to Counterpoint Research, the domestic mobile phone market, expected to post solid growth with the launch of new 5G handsets, took a hit and sales of smartphones were down by 10% year-on-year.

Airlift

- Korean Air extended suspensions on ICN-HNL route (KE053) and ICN-NRT-HNL route (KE001) by another two months until August 31.
- Asiana Airlines suspended flight services on the ICN-HNL route (OZ232) until June 30.
- Hawaiian Airlines cut services on the ICN-HNL route (HA460) from March 2 to June 30.

Market Intelligence/Market Conditions Impact on Hawai'i Travel

- South Korea's top wholesaler Hana Tour is sending employees on unpaid leave from June until September as it does not expect a travel rebound within the year. It will also shut down or downsize the operations of its overseas-based branches in the U.S. (Hawai'i, Los Angeles, and New York) as well as South East Asia, China, and Europe due to financial difficulties. According to data from Hana Tour, demand for outbound travel plunged 83.8% in February compared to a year earlier, 99.2% in March and 99.9% in April.
- Completion of HDC Hyundai Development Co.'s acquisition of Asiana Airlines Inc. may be destined for the long haul as it remains unclear when there will be a revival in air travel. HDC is due to reach the final stage of the merger administrative process at end of this month, according to industry sources. Russia has yet to give its sign-off due to coronavirus setbacks. Five other countries including China and the U.S. have already green-lighted the deal.
- Japan has extended entry restrictions for South Korean visitors by another month until end of June. They were imposed in early March, including suspension of a visa-waiver program and application of 14-day quarantine for arrivals. This further delay will impact layovers from Busan market whose travelers use PUS-NRT-HNL routes to visit Hawai'i.

Leisure Activity Update

Travel Trade

- **ANTOR Korea May Meeting:** HTK joined the Association of National Tourist Offices and Representatives in Korea (ANTOR) from this year as a returning member and participated in the initial meeting hosted at Lotte Hotel, on May 28. Fifteen representatives from DMOs, airlines, and transport companies attended the lunch meeting that covered current market conditions, airlift updates, and travel restriction for outbound markets. Recovery plans and post-pandemic strategies were discussed.
- **Travel Exhibition Participation:** HTK participated in a consumer travel exhibition called "The room that is missing travel" in May by supporting several Hawaiian decoration items, travel guide map and brochures. It was hosted by a former editor-in-chief of Traveller Magazine who is also a celebrated travel writer and influencer. The exhibition was designed to rekindle nostalgic memories of travel. It targeted Korean consumers who love to go overseas but are restricted due to Covid-19. It was held in the popular University Road in Seoul where live performances, arts and cultural events are held.

Public Relations

- **Consumer messages via social media:** HTK uploaded an updated Instagram bio to share the extension of 14-day self-quarantine measures on the islands until June 30, according to Podio guidance.
- **Hawai'i Virtual Tour Article:** HTK showcased virtual tour programs in partnership with nation's leading monthly magazine 'Bar & Dining.' With virtual/online travel boom in Korea amid stay-at-home trends, it covered 3D virtual walkthrough experiences of Hawai'i Volcano National Park, Honolulu Museum of Art, and 'Iolani Palace in the June issue, in order to remind would-be visitors of the Hawaiian Islands and motivate them to explore the destination virtually.
- **HTK Covid-19 Crisis Management:** HTK has been following its real-time crisis management protocol by submitting daily HTA Covid-19 reports with timely media monitoring and content localization for Korean travelers.
 - **Media monitoring:** HTK shared daily Covid-19 reports to update the South Korean market situation, including newly confirmed cases, government responses, and details about the economy, airlift, travel industry, competing destination activity and public sentiment, etc.
- **E-newsletter distribution:** HTK published the monthly e-newsletter to share latest destination updates and travel alerts on Covid-19 with consumers. It covered the state government's announcement on lifted quarantine requirements for inter-island travel as of June 16, Bishop Museum's online learning center, and Battleship Missouri Memorial's virtual tour.
- **GoHawai'iKR travel alert updates:** HTK delivered up-to-date travel alerts to would-be visitors and industry partners in local language, emphasizing state government policies on extended 14-day self-quarantine measures for all arrivals.

Sales Activities

Sales Calls

Airline	Wholesaler/TA/TO/OTA	Other	Total
5	10	3	18

- **Airlines:** HTK made regular virtual sales calls to airline partners to share up-to-date airlift information in response to Covid-19 and to cover market prospects in line with the state government's official announcement.
- **Travel Agencies:** HTK held regular non-direct meetings with leading South Korean wholesalers, retailers, OTAs and receptive operators to share current market details and check booking momentum for Hawai'i.
- **Others:** HTK shared current market status and trends with industry partners from Hawai'i or local hotels, transport operators, attractions, and communities

Responsible Tourism Update

Hawaiian Culture

- HTK has kept a dry and neutral tone in introducing Hawaiian language via the monthly Aloha E-Newsletter. In the June issue, HTK featured the Hawaiian expression *Huli* (which means turn over,

change as an opinion, or search and seek) to help Korean audiences get familiar with Hawaiian culture.

Hawai'i Tourism Taiwan 2020 Monthly Leisure Marketing Report – May

Market Intelligence/Market Conditions

Economy

- According to the Executive Yuan, Taiwan's economic growth rate in Q1 2020 is 1.54%. The growth is mainly resulted from export (0.86%) and investment (0.68%). Economy in Taiwan was not affected by COVID-19 and remained positive because of the coming back of many Taiwanese investors and the increase of trade activities with the US market.

Outbound Travel Market

- Due to the on-going COVID-19 pandemic in overseas destinations, Taiwan government has extended the travel restrictions imposed on inbound group visitors and to embargo outbound group tours to June 30.
- OTAs and travel agencies in Taiwan are focusing on domestic travel for Taiwanese consumers as the government gradually releases travel restrictions for the domestic market. On the other hand, outbound travel will be relaxed and reopen in a few more months.

Competitive Environment

- Guam is conditionally relaxing restrictions of entry to Guam for South Korea, Taiwan, and Japan effective July 1, 2020. However, Taiwanese people who has traveled to Guam are still required to take a 14-day quarantine when returning home.

Consumer Trends

- The government is releasing stimulus vouchers for the people to spend on consumer goods. Hotels and merchants are also launching promotional mechanisms to attract consumers for spending the vouchers.

Travel Trends

- Compared to pre-COVID-19, Taiwanese people are more willingly to travel domestically. About 58% of the potential travelers prefer to visit the east side of Taiwan or outlying Islands to enjoy fresh air and the environment in the countryside. About 45% of consumers considered to plan for outbound travel as soon as the travel bans and quarantine regulations are relaxed.

Media Trends

- Due to the continuing COVID-19 pandemic around the world, media in Taiwan tend to cover news of domestic travel and lifestyle. Most information regarding outbound travel and international destinations are suspended.

Airlift

- China Airlines has been analyzing the market and assessing the timing to resume its Taipei – Honolulu route. They have decided to suspend its regular service to Hawai'i through July.
- One of Taiwan's air carriers, Starlux Airlines, will be resuming its 3 times weekly flight services to Macau, China on June 1 and once a week flights to Penang, Malaysia on June 18 to supply business travel demands.

Leisure Activity Update

Consumer

- Due to the continuous outbreak of COVID-19, HTT is advised to suspend all marketing initiatives for May.

Travel Trade

- HTT will be invited as one of the speakers for the trade training seminar hosted by Pacific Asia Tourism Association (PATA) Taiwan. HTT will share about destination Hawai'i, Aloha spirit and Hawaiian Culture in the training session.

Public Relations

- HTT has paused all paid and original PR and social media activities due to the COVID-19 pandemic. However, HTT continues to monitor the market conditions and will work with HTA to keep Taiwan market updated of The Hawaiian Islands on culture, natural resources, and the community once the crisis eases down.

Sales Activities

Sales Calls

Airline	Wholesaler/TA/TO/OTA	Other	Total
1	1	9 Media	12

- According to Lion Travel and Kkday – the biggest wholesaler/travel agency and OTA in Taiwan – the focus is on domestic travel sales and product development at the moment due to COVID-19 pandemic and government restrictions for outbound travel. They are hibernating the strengths in outbound travel products and wait until the international borders reopens.
- HTT has reached out to Taiwan's top tiered travel consumer media. All of them are focusing on sharing domestic travel during COVID-19 pandemic. However, they are still interested in receiving inspirations from HTT and are expecting to resume coverage for outbound travel stories later in the summer.

Responsible Tourism Update

- HTT shared aloha with partners in Taiwan while joining ANTOR meetings and participating events.

Island Chapters Engagement Update

- No news to report.

“Coming Attractions” for Leisure Market

What	When	Where
Aloha Taiwan! MCI & Leisure Virtual Mission	TBD	Taipei, Taiwan
Cuisine of Aloha Initiative	TBD	Taipei, Taiwan



Group Sales Status Report – May 2020

OVERVIEW

There has been a steady decline in the number of planners who expect to hold events this summer, and half (50%) of planners reported that they have pushed rescheduled dates into 2021 and even 2022, according to the Northstar Meetings Group's latest weekly Pulse Survey. This indicates that events are shifting into 2021, with rescheduled events moving out of 2020 and into next year. This decline in confidence for scheduling events is even more significant for new events. In fact, only 28 percent expect to hold meetings this year, with a mere five percent planning to meet this summer. On the other hand, 38 percent of respondents reported scheduling new events for the first quarter of 2021. But in terms of the number of events respondents will plan for 2021, the overriding sentiment has shifted from "too soon to know" to an understanding that fewer events will be held next year. Compared to two weeks ago, +6 percent more planners expect the number of events in 2021 to decline (30% vs. 36%). Not surprisingly, large meetings are anticipated to see the greatest decline, with 55 percent of respondents expecting to plan fewer events of 5,000 attendees or more in the 12 to 18 months following the crisis.

For those meetings that are slotted to move forward this summer, the challenge is how to relaunch safely to reassure and encourage attendees to travel. Connect Meetings is currently committed to holding their event in August and is using this opportunity to pioneer safety measures for meetings in a post-COVID-19 world. They have released their "Safe + Clean Connect" plan, which lists concrete steps they are taking to ensure the safety of attendees, including temperature screenings, provisions of masks, gloves and hand sanitizers, disinfectant foggers and no-contact food and beverage. But the big question is whether, even with these new measures, attendees will show up. In order for that to happen, not only will travel need to be deemed "safe"—a complicated term, with each country, state and individual determining their own acceptable limits for risking reopening and resuming travel—but the relative benefit of traveling to a live event, as opposed to attending virtually, will need to outweigh the risks. With pent-up demand being released as places begin to reopen, revenge attending might help certain events get back on their feet. But ultimately attendance will come down to how well destinations manage the spread of the virus as well as how risky attendees perceive travel to be for the foreseeable future.

SALES PRODUCTION (in the month for any year)

Table 1: Total HVCB Sales Production – May 2020

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year
Definite & Assist-Definite	536	20,622	-97%	30,307	114,474	-74%
Tentative & Assist-Tentative	23,478	100,573	-77%	249,524	488,216	-49%

Merging of Hawai'i Convention Center data with HVCB's Simpleview database continues. The ongoing auditing and database cleansing may result in changes to previously reported figures.

**Table 2a: HVCB Citywide Sales Production
May 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite	0	2,730	-100%	0	18,890	-100%	TBD	TBD
New to Hawai'i	0	0	N/A	0	5,895	-100%	TBD	TBD
Tentative	10,612	12,705	-16%	30,203	135,407	-78%	TBD	TBD
MCI								
Definite	0	0	N/A	0	15,900	-100%		
New to Hawai'i	0	0	N/A	0	5,895	-100%		
Tentative	10,612	7,110	49%	30,203	118,382	-74%		
Non-MCI								
Definite	0	2,730	-100%	0	2,990	-100%		
New to Hawai'i	0	0	N/A	0	0	N/A		
Tentative	0	5,595	-100%	0	17,025	-100%		

Merging of Hawai'i Convention Center data with HVCB's Simpleview database continues. The ongoing auditing and database cleansing may result in changes to previously reported figures.

COMMENTS

Market Conditions

The COVID-19 pandemic continues to negatively impact citywide business as all major convention destinations are seeing citywide conventions cancel during this time. Visitor quarantines, travel restrictions and unclear definitions of large groups meetings inhibit both customers and suppliers to move forward with any degree of certainty. Destinations, like Houston and San Diego, are now encountering Q1 2021 convention cancellations. While Washington, D.C. has announced that citywide conventions will not be held until a COVID-19 vaccine is in use.

Sales Production Analysis

Citywide sales production has all but halted as citywide customers focus on cancelling current conventions due to COVID-19 and Meet Hawai'i's downsized citywide team focus on rebooking Fall 2020 customers for future years. During May, the citywide team previewed new Convention Center Floor Plans adjusted to meet CDC social distancing guidelines with key convention hotels and Fall 2020 citywide customers. Two of the four Fall 2020 citywide conventions have chosen to rebook for future years, while the remaining two are working with Meet Hawai'i and its hotel partners to come up with creative solutions to accommodate their conventions with new COVID-19 parameters.

Highlight of Key Definites

- None to report for May.

Highlights of Any Key Tentatives

- Convention — high tech corporation, November 2026 (10,612 room nights)

Highlights of Any Key Cancellations

- Convention – labor union association, August 2020 (27,040 room nights)
- Sports – sports group, July 2020 (885 room nights)
- Special Event – dance convention, May 2020 (260 room nights)

**Table 2b: HVCB Single Property Sales Production
May 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite	536	8,935	-94%	21,818	62,739	-65%	TBD	TBD
New to Hawai'i	206	2,021	-90%	19,479	31,528	-38%	TBD	TBD
Tentative	12,641	81,620	-85%	194,360	312,778	-38%	TBD	TBD
MCI								
Definite	536	8,935	-94%	21,468	62,719	-66%		
New to Hawai'i	206	2,021	-90%	19,129	31,508	-39%		
Tentative	12,477	81,620	-85%	189,861	307,525	-38%		
Non-MCI								
Definite	0	0	N/A	350	20	1650%		
New to Hawai'i	0	0	N/A	350	20	1650%		
Tentative	164	0	N/A	4,499	5,253	-14%		

COMMENTS

Market Conditions

Hawai'i's tourism market is at a standstill due to the current 14-day quarantine mandate. As the date to reopening its doors to tourism lengthens, the Meet Hawai'i team continues to be a resource for all stakeholders, serving as a conduit between customers and hotel partners, supporting and handling the fluid situation of cancellations and the rebooking of postponed programs.

Sales Production Analysis

Year-to-date (YTD) production reveals the grim reality of the current state of the meetings industry for Hawai'i. Definite production has dropped -65 percent compared to the same time last year, while tentative production has decreased to -38 percent.

Highlights of Any Key Definites

- Incentive – financial corporation, April 2021 (330 room nights)
- Meeting – insurance corporation, November 2020 (206 room nights)

Highlights of Any Key Tentatives

- Incentive – financial corporation, May 2023 (2,990 room nights)
- Incentive – insurance corporation, April 2021 (2,247 room nights)
- Convention – fraternal association, May 2025 (2,150 room nights)
- Convention – medical association, February 2023 (1,656 room nights)

Highlights of Any Key Cancellations

- Meeting – medical association, August 2020 (746 room nights)
- Meeting – medical association, July 2020 (600 room nights)

Advertising Efforts

- Meetings, conventions and incentives (MCI) April Paid Media Recap
 - None to report for the month.

Public Relations Efforts

- Activity highlights include:
 - Suspended all dissemination of information on behalf of Meet Hawai'i and the industry partners, as the status of offerings, amenities, programs, facility updates etc. are uncertain and in flux.

- Media Coverage Highlights:
 - None to report for the month.

- April Impressions and Publicity Values for Articles that included Hawai'i:

April <u>Impressions</u>	April <u>Publicity Values</u>
Print: 413,148	Print: \$ 72,175.78
Online: 54,015,109	Online: \$ 39,364.31
Broadcast: 6,829,003	Broadcast: \$ 1,159,368
Total: 61,257,260	Total: \$ 1,270,908.09

**Table 2c: Hawai'i Tourism Canada Single Property Sales Production
May 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	0	N/A	0	1,080	-100%	TBD	TBD
New to Hawai'i	0	0	N/A	0	1,080	-100%	TBD	TBD
Tentative & Assist-Tentative	0	311	-100%	4,513	2,076	117%	TBD	TBD
MCI								
Definite & Assist-Definite	0	0	N/A	0	1,080	-100%	TBD	TBD
New to Hawai'i	0	0	N/A	0	1,080	-100%	TBD	TBD
Tentative & Assist-Tentative	0	311	-100%	2,263	2,076	9%	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	2,250	0	N/A	TBD	TBD

COMMENTS

Market Conditions

Impact of COVID-19 on Travel Activity

- Travel restrictions have grounded many travelers. Canadian air carriers have reduced service by 13 million seats in the first half of 2020, with more than 11 million in April and May alone. International travel may remain at below-normal levels through December 2021.
- The results of the latest Travel Intentions Survey by the Conference Board of Canada show that interest in planning a trip has dropped to 45 percent, down from an average of 75-80 percent.
- Flight Centre says the company is already starting to see a surge in interest, mostly for travel next year, and providers are cutting prices and changing existing policies, so consumers feel comfortable booking now.
- Despite cancelling all flights up to June 30, Air Canada revealed that its operating schedule for June is now available on aircanada.com, offering service to certain key destinations including, Cancún, Barbados, Varadero, Cayo Coco, Montego Bay, Paris, Athens and Barcelona, among many others.
- WestJet is extending its temporary transborder and international route suspensions through June 25, 2020 and has updated its schedule for June 5 - July 4.

Sales Production Analysis

Hawai'i Tourism Canada (HTCanada) has no production to report for the month of May amid the COVID-19 pandemic. Some positive news is that active tentative leads have not cancelled and are planning to "wait and see" how the COVID-19 pandemic unfolds down the line.

Advertising and PR Activity

- None to report for May.

**Table 2d: Hawai'i Tourism China Single Property Sales Production
May 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	1,440	-100%	600	5,737	-90%	TBD	TBD
New to Hawai'i	0	0	N/A	600	4,297	-86%	TBD	TBD
Tentative & Assist-Tentative	0	500	-100%	2,840	5,305	-46%	TBD	TBD
MCI								
Definite & Assist-Definite	0	1,440	-100%	0	2,330	-100%	TBD	TBD
New to Hawai'i	0	0	N/A	0	890	-100%	TBD	TBD
Tentative & Assist-Tentative	0	500	-100%	2,240	3,620	-38%	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	0	N/A	600	3,407	-82%	TBD	TBD
New to Hawai'i	0	0	N/A	600	3,407	-82%	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	600	1,685	-64%	TBD	TBD

COMMENTS

Market Conditions

China Outbound Travel Market – China's domestic corporate travel market has restored approximately 20-30 percent of its normal scale so far, according to Trip.com Group's business travel unit Ctrip Corporate Travel. Chinese business travel market declined 90 percent in the wake of COVID-19, but the sector has gradually returned to business since March. China had a business travel market worth of RMB 2.8 trillion (USD 394 billion) in 2019, but only 10 percent of the businesses were served by professional corporate management companies.

Sales Production Analysis

Hawai'i Tourism China (HTC) has no production to report for the month of May amid the COVID-19 pandemic. HTC will also continue to track lost business and/or programs postponed due to COVID-19 with the focus of bringing them to Hawai'i .

Advertising and PR Activity

- None to report for May.

**Table 2e: Hawai'i Tourism Japan Single Property Sales Production
May 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	6,173	-100%	7,204	16,101	-55%	TBD	TBD
New to Hawai'i	0	5,233	-100%	4,384	12,705	-65%	TBD	TBD
Tentative & Assist-Tentative	0	3,303	-100%	7,204	16,398	-56%	TBD	TBD
MCI								
Definite & Assist-Definite	0	6,173	-100%	7,204	15,429	-53%	TBD	TBD
New to Hawai'i	0	5,233	-100%	4,384	12,033	-64%	TBD	TBD
Tentative & Assist-Tentative	0	3,303	-100%	7,204	15,726	-54%	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	0	N/A	0	672	-100%	TBD	TBD
New to Hawai'i	0	0	N/A	0	672	-100%	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	672	-100%	TBD	TBD

COMMENTS

Market Conditions

Coronavirus Outbreak

- Staff at travel agencies and airlines are beginning to return to work as the Japanese government lifts the emergency declaration. With staff returning to work, businesses are determining appropriate timing for recovery. Stakeholder groups in both Japan and Hawai'i have continued to exchange information and discuss recovery promotions.
- Cancellations from the MICE market have summed to 36,000. Most leads are now being postponed to Q1 in 2021. Travel agencies continue to deal with their leads' cancellation on a case by case basis.

Airlines

- As of May 25, most flights between Japan and Hawai'i have been suspended through June 30, with hotels shuttered for similar durations.
- Airlines and airports have been working toward enhancing Safety, Sanitization and Sustainability as they work to reopen travels. Some measures include enhancement of sanitation measures, reducing carbon footprints, improving fuel efficiency and requiring masks for both staff and passengers.
- Although fuel surcharge rates will be reduced to zero, seating assignments adhering to social distancing guidelines are predicted to cause fares to rise.

5 Target Pillar Condition/Support

Incentive/Anniversary & Edu-tourism:

- With the end of COVID-19 and recovery of the travel industry being difficult to determine, many leads are being shifted from being postponed to within 2020 to 2021 Q1.

- Leads on a small to medium scale with under 200 pax will be the main leads to target initially.

Sports & Entertainment:

- The global spread of COVID-19 is prompting the cancellation of most sports and entertainment related events. With the end of COVID-19 not being apparent, many events are shifting from postponement to cancellation.

Attendance Building:

- The fan club event planned in 2021 and 1,200 pax incentive lead in 2023, set to utilize the HCC have not indicated intents to cancel as dates are still far away.

Sales Production Analysis

Hawai'i Tourism Japan (HTJ) has no production to report for the month of May amid the COVID-19 pandemic.

Highlight of Key Cancellations

- Convention – fraternal association, June 2020 (1,758 room nights)
- Incentive – high tech corporation, June 2020 (216 room nights)

Advertising and PR Activity

- None to report for May.

**Table 2f: Hawai'i Tourism Korea Single Property Sales Production
May 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	524	-100%	247	6,804	-96%	TBD	TBD
New to Hawai'i	0	524	-100%	130	3,921	-97%	TBD	TBD
Tentative & Assist-Tentative	0	524	-100%	1,372	6,414	-79%	TBD	TBD
MCI								
Definite & Assist-Definite	0	524	-100%	247	6,729	-96%	TBD	TBD
New to Hawai'i	0	524	-100%	130	3,846	-97%	TBD	TBD
Tentative & Assist-Tentative	0	524	-100%	1,372	6,339	-78%	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	0	N/A	0	75	-100%	TBD	TBD
New to Hawai'i	0	0	N/A	0	75	-100%	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	75	-100%	TBD	TBD

COMMENTS

Market Conditions

- **Coronavirus Outbreak Key Update in Korea:** South Korea enhanced quarantine measures in the Seoul metropolitan area over the next two weeks through June 14. The decision came as the country reported a whopping 79 new cases tied to the logistics center cluster infection on May 28, which is the most cases the country has seen in nearly two months.
- **Outbound Travel Updates:** According to Korea Tourism Organization (KTO), the number of outbound travel nosedived by a whopping 98 percent to 31,425 travelers in April, compared to 2,246,417 travelers in the same period last year. The air passenger traffic for the U.S. plunged 93 percent to 6,417 travelers, accounting for 21 percent of the entire outbound trips during April.
- **Airlift Updates:** All carriers servicing direct flights for ICN-HNL routes – Korean Air (KE001 & KE503), Asiana Airlines (OZ232), and Hawaiian Airlines (HA460) – have suspended operation until the end of June.
- **Exchange Rate:** The average USD/WON exchange rate in May was 1,230.54 won, a slight increase from the previous rate of 1,223.06 won in April. South Korean airlines will not apply fuel surcharges on international routes in May to reflect falling oil prices. The surcharge for one-way tickets on international routes will come to zero the following month, unchanged from May.

Sales Production Analysis

Hawai'i Tourism Korea (HTK) was unable to fulfill its KPI targets for May due to the impact of the COVID-19 pandemic. HTK's MCI team will be in line with HTA and Meet Hawai'i Team's directive and make its continuous effort to deliver the key messages to Korean MICE corporate clientele.

Advertising and PR Activity

- None to report for May.

**Table 2g: Hawai'i Tourism Oceania Single Property Sales Production
May 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	820	-100%	438	3,123	-86%	TBD	TBD
New to Hawai'i	0	820	-100%	438	2,622	-83%	TBD	TBD
Tentative & Assist-Tentative	225	1,610	-86%	9,032	9,838	-8%	TBD	TBD
MCI								
Definite & Assist-Definite	0	0	N/A	358	1,751	-80%	TBD	TBD
New to Hawai'i	0	0	N/A	358	1,711	-79%	TBD	TBD
Tentative & Assist-Tentative	225	610	-63%	7,512	8,398	-11%	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	820	-100%	80	1,372	-94%	TBD	TBD
New to Hawai'i	0	820	-100%	80	911	-91%	TBD	TBD
Tentative & Assist-Tentative	0	1,000	-100%	1,520	1,440	6%	TBD	TBD

COMMENTS

Market Conditions

The Impacts of COVID-19

- While the COVID-19 pandemic continued to have a devastating impact on the global economy, during May it was pleasing to see that both Australia and New Zealand have started to see the benefits of their early reaction to the pandemic.
- New Zealand dropped to Level 2 lockdown alert mid-May, so many businesses were able to reopen which was vital for the economy. At the end of May, New Zealand only had 1 active case of COVID and had 0 new cases diagnosed for the previous 10 days. The country is looking at moving to alert Level 1 early-mid June, which will mean most aspects of day to day living will go back to normal, but border restrictions will remain in place.
- On May 8, Australian Prime Minister, Scott Morrison announced that the National Cabinet has agreed on a three-step plan to bring Australia back to a COVID-safe economy by July. The 3 Step Framework to a COVIDSafe Australia will move at different times based on local conditions. A week later, the Australian Chamber of Commerce and Industry's newly-formed, Tourism Restart Taskforce approved the timetable for business events, venues and attractions, and domestic and international travel. According to the proposed timetable, the gradual return of business events in Australia would begin in July with events of fewer than 100 patrons, and business events with more than 100 attendees would begin to return in September. Ticketed events with more than 100 attendees will not restart until October 15 and all international travel will not resume until later this year under the proposed timeline.

Aviation Updates

- There continues to be no airlift from the Oceania region to Hawai'i during May. Dates when flights will resume have not yet been announced.

- Meanwhile, Australian national carrier, Qantas, has unveiled new measures to prevent the spread of COVID-19 on its flights. The airline will roll out its “Fly Well” safety measures from June 12 as part of preparations for the domestic travel. Qantas Chief Executive, Alan Joyce, says the airline is preparing for the resumption of domestic travel in July, with plans for \$19 bargain flights and improved safety measures to promote domestic travel.

Impacts to the Economy & Industry

- **Australia:** On May, the Australian Bureau of Statistics (ABS) reported that almost 600,000 people left the workforce in April, which was the single largest fall in employment in a month that wiped away two years of jobs growth. While official unemployment rose by a full percentage point to 6.2 percent, it would have been much worse but for the collapse in the number of people active in the jobs market. Despite the alarming unemployment rate, the AUD has rallied to USD 0.67 which was the highest since February due to the recovering trade with China.
- **New Zealand:** New Zealand’s unemployment rate sat at 4.2 percent at the beginning of May, but economists predict it could exceed 10 percent by September once the Government wage subsidy scheme comes to an end. Consumer confidence in spending is likely to slow down as people feel insecure about their job security. The NZ dollar sat at USD 0.61 at the end of May.

Sales Production Analysis

Hawai’i Tourism Oceania (HTO) was unable to fulfill its KPI targets for May due to the impact of the COVID-19 pandemic. However, the team has remained in constant contact with key clients to ensure Hawai’i remains front of mind once planning resumes.

Highlight of Key Tentatives

- Incentive – consumer products corporation, September 2021 (225 room nights)

Highlight of Key Cancellations

- Meeting – financial corporation, July 2020 (325 room nights)

Advertising and PR Activity

- None to report for May.

**Table 2h: Hawai'i Tourism Taiwan Single Property Sales Production
May 2020**

Room Nights	2020 Actual Month	Prior Year	Variance to Prior Year	2020 Year-to-Date	Prior Year	Variance to Prior Year	Annual Goal	YTD as % of Annual Goal
Combined Total								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	0	N/A	TBD	TBD
MCI								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	0	N/A	TBD	TBD
Non-MCI								
Definite & Assist-Definite	0	0	N/A	0	0	N/A	TBD	TBD
New to Hawai'i	0	0	N/A	0	0	N/A	TBD	TBD
Tentative & Assist-Tentative	0	0	N/A	0	0	N/A	TBD	TBD

COMMENTS

Market Conditions

- Considering the slowdown of COVID-19 spread in Taiwan, the Central Epidemic Command Center has gradually relaxed regulations to contain the coronavirus. As of June 7, restrictions for social distancing and prevention measures such as no eating and drinking in the public transportation will be lifted.
- However, due to the on-going COVID-19 pandemic in overseas destinations, Taiwan government has extended the travel embargo of outbound group tours to June 30.
- China Airlines, the national carrier operating non-stop services between Taiwan and Honolulu, is currently assessing the timing to resume the route. The projected load factor in second half of June is about 30 percent.

Sales Production Analysis

Hawai'i Tourism Taiwan (HTT) has no production to report for the month of May amid the COVID-19 pandemic. HTT will continue efforts in tracking potential leads with MCI intermediaries to be ready when marketing activities kick off again.

Advertising and PR Activity

- None to report for May.

**Table 3: Island Distribution of HVCB Single Property Sales – Year-to-Date
May 2020**

Island	Tentative Room Nights YTD Actual*	Definite Room Nights Annual Goal	Definite Room Nights Month Actual	Definite Room Nights YTD Actual	Percent of Goal	Lead-to-Booking Conversion (Room Nights) Goal	Lead-to-Booking Conversion (Room Nights) Actual
O‘ahu	118,309	TBD	0	2,221	TBD	TBD	2%
Kaua‘i	38,385	TBD	0	690	TBD	TBD	2%
Maui County	130,841	TBD	206	8,013	TBD	TBD	6%
Hawai‘i	98,023	TBD	330	10,894	TBD	TBD	11%
Total	385,558	-	536	21,818	-		

*Tentative room nights do not match those in Table 2b because many leads are distributed to more than one island.

‘ELELE PROGRAM

May meetings and updates from Deborah Zimmerman, ‘Elele Program Director from New Millennium Meetings (NMM):

Developing ‘Elele Support

- The ‘Elele Program Director is broadening ‘Elele support by developing connections with the Department of Defense (DOD). The DOD contributes approximately \$9 billion to Hawai‘i’s GDP each year, which major spending divided between construction, ship building, and professional services. Areas where DOD interest overlap with the University of Hawai‘i include water, energy, cybersecurity, health and disaster risk reduction, space and work force development. There is great potential in identifying conventions in these areas and hosting defense related meetings with Pacific Rim allies in Hawai‘i, which would be strategic in improving community support for tourism.

Enhanced Marketing Material

- ‘Elele Program continues to work on updating the General Scientific Infrastructure in Hawai‘i brochure, which will be an important marketing piece for the pursuit of research related meetings in the future.

LOST BUSINESS

**Table 4a: HVCB Citywide Lost Business
May 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations	Reason for Lost Business
Non-MCI: Sports (16493)	Sports	4,965	8,000	08/15/2021 - 08/23/2021	Initially, Hawai'i only	Program postponed due to COVID-19.
MCI: Convention - Domestic (18429)	Medical, Healthcare	6,270	3,800	02/18/2024 - 02/25/2024	Arizona	Program lost to Arizona.
MCI: Convention - Domestic (18843)	Government	1,000	300	08/06/2020 - 08/08/2020	Initially, Hawai'i only	Program postponed due to COVID-19.

**Table 4b: HVCB Single Property High Profile Lost Business
May 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations	Reason for Lost Business
MCI: Incentive (16382)	Medical, Pharm	703	200	01/30/2021 - 02/07/2021	Caribbean	Program postponed due to COVID-19.
MCI: Incentive (18132)	Consumer Products	750	300	10/02/2021 - 10/07/2021	Initially, Hawai'i only	Program postponed due to COVID-19.
MCI: Convention - Domestic (18522)	Food, restaurants	918	300	10/20/2020 - 10/23/2020	California, Arizona	Program postponed due to COVID-19.
MCI: Incentive (18777)	Medical, Pharm	2,165	550	05/01/2022 - 06/25/2022	Initially, Hawai'i only	Program lost to another destination.
Non-MCI: Sports (18987)	Sports	815	500	11/26/2020 - 12/01/2020	Initially, Hawai'i only	Program postponed due to COVID-19.

**Table 4c: International Single Property Lost Business
May 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations	Reason for Lost Business
HT Canada: MCI: Incentive (18936)	Finance, Banking	821	420	04/12/2021 - 04/18/2021	Initially, Hawai'i only	Program lost to an all-inclusive cruise.
HT Canada: MCI: Meeting (18999)	Finance, Banking	200	50	05/12/2021 - 05/15/2021	Initially, Hawai'i only	Program was lost due to change in requirements.

New-to-Hawai'i Definite Bookings

**Table 5a: HVCB Citywide New to Hawai'i Definite Bookings
May 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations
None to report for May.					
TOTAL NEW TO HAWAI'I CITYWIDE BOOKINGS FOR THE MONTH					0
TOTAL ROOM NIGHTS FOR NEW TO HAWAI'I CITYWIDE BOOKINGS					0

**Table 5b: HVCB Single Property High Profile New to Hawai'i Definite Bookings
May 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations
None to report for May.					

**Table 5c: International Single Property New to Hawai'i Definite Bookings
May 2020**

Market	Vertical Market Segment	Total Room Nights	Total Attendees	Meeting Dates	Competing Destinations
None to report for May.					
TOTAL NEW TO HAWAI'I SINGLE PROPERTY BOOKINGS FOR THE MONTH					1
TOTAL ROOM NIGHTS FOR NEW TO HAWAI'I SINGLE PROPERTY BOOKINGS					206

New to Hawai'i bookings are accounts that have never met in Hawai'i before or, in the case of citywides, have not met in Hawai'i in the last 10 years or for single property bookings, not in the past five years.

MAJOR SALES AND MARKETING ACTIVITIES

Meet Hawai'i participated in various educational webinars discussing the COVID-19 impact to the meetings industry and recovery strategies in May.

FUTURE SALES AND MARKETING ACTIVITIES

Meet Hawai'i will participate in the following MCI events in the upcoming months:

None to report for the next three months.

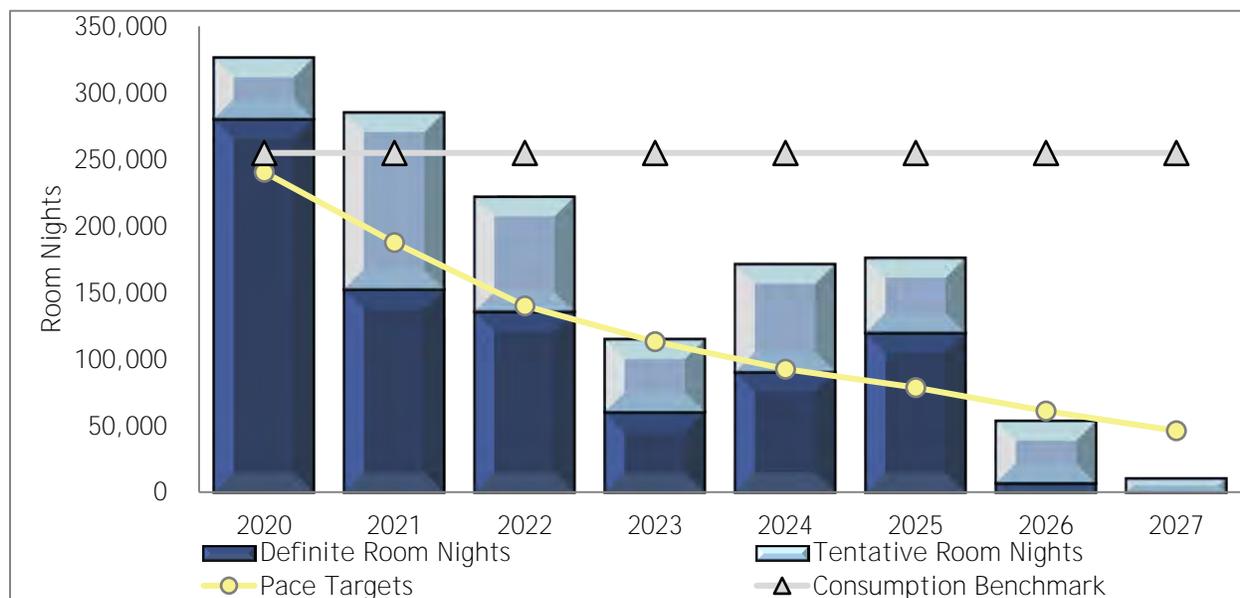
CONSUMPTION

The TAP Reports on the next page show the number of events and room nights on the books for each year 2020-2027 against a rolling 36-month consumption benchmark.

Table 6: The TAP Report: Hawai'i 8-year Pace (citywide and single property)

Period ending: May 31, 2020

Report date: June 3, 2020



Hawai'i R/N	2020	2021	2022	2023	2024	2025	2026	2027	Total
Definite Room Nights	279,691	152,202	135,480	60,291	90,169	119,528	7,014	0	844,375
Pace Targets	240,358	187,461	139,894	113,027	92,389	78,534	60,906	46,072	958,641
Variance	39,333	(35,259)	(4,414)	(52,736)	(2,220)	40,994	(53,892)	(46,072)	(114,266)
Consumption Benchmark	254,805	254,805	254,805	254,805	254,805	254,805	254,805	254,805	2,038,440
Pace Percentage	116%	81%	97%	53%	98%	152%	12%	0%	88%
Total Demand Room Nights	897,597	583,436	322,795	185,320	151,183	169,070	71,299	10,525	2,391,225
Lost Room Nights	617,906	431,234	187,315	125,029	61,014	49,542	64,285	10,525	1,546,850
Conversion Percentage	31%	26%	42%	33%	60%	71%	10%	0%	35%
Tentative Room Nights	46,302	132,663	86,315	54,783	81,185	56,397	46,843	10,650	515,138

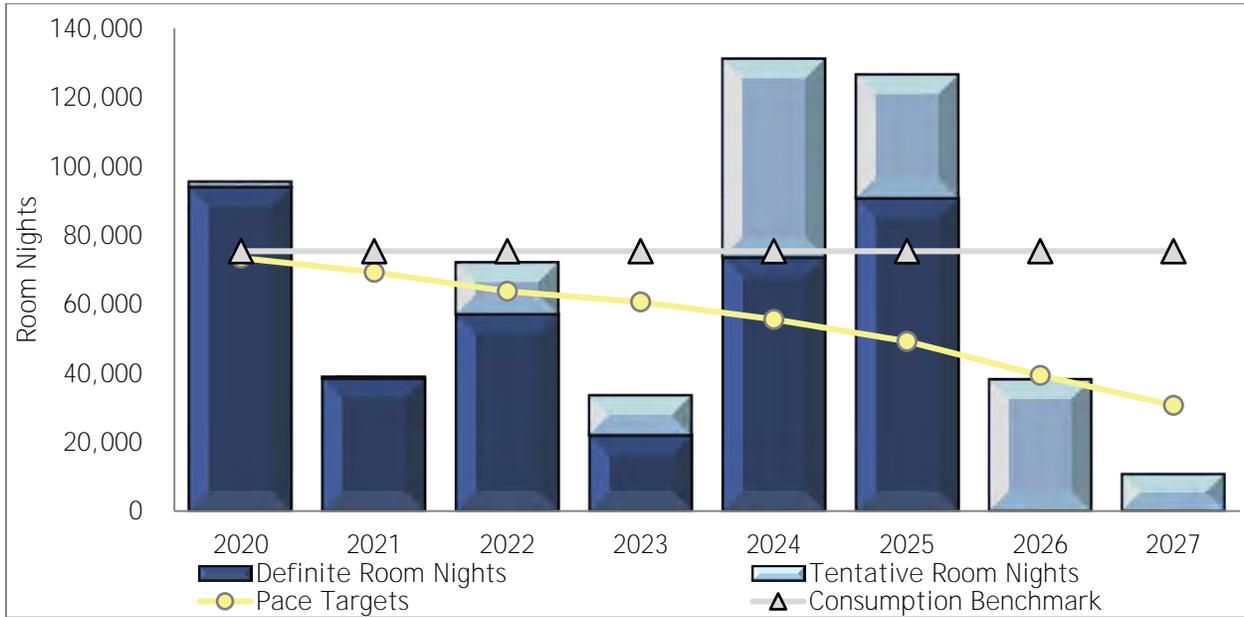
Hawai'i Events	2020	2021	2022	2023	2024	2025	2026	2027	Total
Definite Events	282	122	51	22	18	16	4	0	515
Pace Targets	289	115	50	28	15	9	5	3	514
Variance	(7)	7	1	(6)	3	7	(1)	(3)	1
Consumption Benchmark	356	356	356	356	356	356	356	356	2,848
Pace Percentage	98%	106%	102%	79%	120%	178%	80%	0%	100%
Total Demand Events	825	285	94	46	27	20	7	1	1,305
Lost Events	543	163	43	24	9	4	3	1	790
Conversion Percentage	34%	43%	54%	48%	67%	80%	57%	0%	39%
Tentative Events	104	237	80	30	15	13	8	1	488

The number of events reported in TAP is slightly higher than the actual number of events due to a number of overflow programs and the splitting of some bookings into two in order to track shared credit.

Table 7: The TAP Report: Convention Center 8-year Pace (citywide only)

Period ending: May 31, 2020

Report date: June 3, 2020



Hawai'i R/N	2020	2021	2022	2023	2024	2025	2026	2027	Total
Definite Room Nights	93,965	38,402	57,045	21,939	73,540	90,687	0	0	375,578
Pace Targets	73,394	69,257	63,745	60,664	55,604	49,227	39,352	30,647	441,890
Variance	20,571	(30,855)	(6,700)	(38,725)	17,936	41,460	(39,352)	(30,647)	(66,312)
Consumption Benchmark	75,389	75,389	75,389	75,389	75,389	75,389	75,389	75,389	603,112
Pace Percentage	128%	55%	89%	36%	132%	184%	0%	0%	85%
Total Demand Room Nights	369,621	320,705	174,883	111,327	120,577	140,229	64,285	10,525	1,312,152
Lost Room Nights	275,656	282,303	117,838	89,388	47,037	49,542	64,285	10,525	936,574
Conversion Percentage	25%	12%	33%	20%	61%	65%	0%	0%	29%
Tentative Room Nights	1,500	500	15,026	11,570	57,601	35,884	38,188	10,650	170,919

Hawai'i Events	2020	2021	2022	2023	2024	2025	2026	2027	Total
Definite Events	10	9	8	3	7	5	0	0	42
Pace Targets	14	11	9	7	6	3	1	1	52
Variance	(4)	(2)	(1)	(4)	1	2	(1)	(1)	(10)
Consumption Benchmark	19	19	19	19	19	19	19	19	152
Pace Percentage	71%	82%	89%	43%	117%	167%	0%	0%	81%
Total Demand Events	45	36	20	12	12	9	3	1	138
Lost Events	35	27	12	9	5	4	3	1	96
Conversion Percentage	22%	25%	40%	25%	58%	56%	56%	56%	30%
Tentative Events	1	1	2	4	5	3	4	1	21

The number of events reported in TAP is slightly higher than the actual number of events due to a number of overflow programs and the splitting of some bookings into two in order to track shared credit.

Glossary of TAP Report Terms

Consumption Benchmark – The average number of definite room nights produced by Meet Hawai'i for each month and year for the last three twelve-month periods. Each month the “oldest” month is dropped from the calculation and the most recent month is added.

Conversion Index – A measurement for each month and year of the Meet Hawai'i's Conversion Percentage compared to the Peer Set's Conversion Percentage. A value greater than 100 indicates that Meet Hawai'i is converting more demand to definite room nights than the Peer Set.

Conversion Index Rank – The position of Meet Hawai'i's Conversion Index compared to the Peer Set.

Conversion Percentage – The percentage of Total Demand Room Nights that Meet Hawai'i converts to Definite Room Nights for each month a year at the time the report is published.

Definite Room Nights – Number of definite room nights, confirmed by Meet Hawai'i for each month and year at the time the report is published.

Definite Room Night Share % – A percentage indicating the Meet Hawai'i's portion of the Peer Set's Definite Room Night.

Lost Room Nights – The number of room nights, both definite and tentative, that have been lost for each month and year at the time the report is published.

Pace Index – A measurement for each month and year of the Meet Hawai'i's Pace Percentage compared to the Peer Set's Pace Percentage. A value greater than 100 indicates that the Meet Hawai'i's Pace Percentage is higher than that of the Peer Set. A number less than 100 indicates that the Meet Hawai'i's Pace Percentage is less than that of the Peer Set.

Pace Index Rank – The position of the Meet Hawai'i's Pace Index compared to the Peer Set.

Pace Percentage – The percentage of Definite Room Nights compared to the Pace Target. If Meet Hawai'i continues to book at current trends the same percentage can be applied to the Consumption Benchmark when each month and year passes.

Pace Target – Number of definite room nights that should be confirmed for each month and year at the time the report is published (updated every month). Pace targets are determined by analyzing a minimum of the last three years definite room nights and all definite room nights confirmed for the future. The analysis is completed by comparing the date a booking was confirmed to that of the arrival date for each confirmed booking and computing the number of months in advance of arrival that each booking was confirmed.

Room Night Demand Share % – A percentage indicating Meet Hawai'i's portion of the Peer Set's Demand.

Tentative Room Nights – The number of tentative room nights pending for each future month and year at the time the report is published.

Total Demand Room Nights – Number of total lead room nights issued by Meet Hawai'i for each month and year at the time the report is published.

Variance – The difference between the Definite Room Nights and the Pace Target.

CONVENTION CENTER PERFORMANCE

Table 8: Convention Center Performance – April 30, 2020 Year-to-Date

PERFORMANCE MEASURE	YTD	TARGET	VARIANCE
Occupancy	5%	33%	-28%
Total Events	42	66	(24)
Total Attendance	51,422	170,629	(119,207)
Visitor Spending	\$100,297,338	\$186,890,363	(\$86,593,025)
Tax Revenue	\$11,734,789	\$21,866,174	(\$10,131,385)
Revenue per Attendee	\$60.29	\$31.32	\$28.97

COMMENTS

Since the facility's closure on March 17, 2020 due to the COVID-19 pandemic, the Hawai'i Convention Center (HCC) has had 110 event cancellations and while the cancellation volume has slowed, it continues. Since April 17, 2020, the facility is being used by the Department of Labor and Industrial Relations to process unemployment calls and claims. The current reforecast as of April 30, 2020 reflects a \$4,171,600 net loss. All performance metrics are now significantly under target due to the COVID-19 pandemic.

DEFINITIONS

- **Single Property Group:** A group that can be booked into a single hotel for both guest rooms and meeting space.
- **Citywide Group:** A group that books Hawai'i Convention Center for meeting space; and which needs two or more hotels and has a minimum of 1,000 out-of-town attendees.
- **Group Bookings:** The total number of group room nights booked for the future. A group is defined as needing a minimum of 10 hotel rooms.
- **MCI and Non-MCI Bookings:** Both MCI and Non-MCI Bookings must primarily be off-shore bookings requiring attendees to stay in visitor accommodations. An MCI booking is an association or corporate meeting, convention or incentive program that requires meeting space. A Non-MCI booking requires off-site meeting space or no meeting space, or is public/consumer-facing like expos, sporting events, etc.
- **Definite Room Night:** Room nights associated with groups that have a signed contract or letter of commitment with the convention center and or a signed contract with a hotel.
- **Tentative Room Night:** Room nights associated with groups that have indicated interest in holding a meeting or convention in Hawai'i and a lead has been sent to the convention center and/or the hotels. Citywide leads are considered tentative when space is blocked at the convention center. Includes leads generated by partners at HVCB coordinated trade shows.
- **Economic Impact:** The direct and induced spending generated from a group meeting in Hawai'i. The economic impact formulas are based on research of attendee spending patterns.
- **Lead-to-Booking Conversion:** Conversion of tentative leads into definite bookings as measured by dividing tentative room nights generated in the month/year by definite room nights for the same month/year.
- **Consumed Room Night:** Room nights generated from groups that have convened in Hawai'i. For citywide events, this figure is calculated from the number of attendees. For single property meetings, the figure is the contracted room nights.
- **Goal:** A level of achievement that has been determined through the goal setting process that includes industry stakeholders and the HTA board.
- **International Markets:** Current areas of focus for international groups. These markets are supported by contractors of HTA.
- **New to Hawai'i – New Business:** A group that has never met or has not had a single property meeting in Hawai'i over the past five years or a citywide meeting within the past 10 years.
- **Repeat Business:** A group that has had a single property meeting in Hawai'i within the past five years or a citywide meeting in Hawai'i within the past 10 years.

- **Island Distribution:** The breakdown of room nights that have been booked on the neighboring islands. This includes Maui, Kaua'i, O'ahu and the Island of Hawai'i.
- **Pace:** A calculation that evaluates the annual sales activity level by comparing production to the same time frames for previous years. This calculation shows if the current year-to-date room night bookings are at the same or higher/lower levels than the past year.
- **Need Period:** A future timeframe where the projections for room night demand are lower, therefore warranting specific sales strategies to attract business.
- **Lost Business:** A group where a lead has been generated due to client interest and Hawai'i was not chosen for the meeting or convention.
- **Total Events:** Total licensed events held at the Hawai'i Convention Center.
- **Total Attendance:** Total delegate attendees at licensed events at the Hawai'i Convention Center.
- **Visitor Spending:** State economic impact of offshore licensed events.
- **Tax Generation:** State tax generation of offshore licensed events.

June 2020

Contract No.	Contractor	Description	Contract Amount	Total Contract Value	Start Date	End Date
14002 S9	AEG Management HCC, LLC dba Hawai'i Convention Center	Hawai'i Convention Center	\$ 11,966,255.00	\$ 141,146,758.00	2/12/2020	12/31/2020
•20192	USS Missouri Memorial Association, Inc. dba Battleship Missouri Memorial	75th Commemoration of the Ending of WWII	\$ 500,000.00	\$ 500,000.00	2/12/2020	12/31/2020
•20195	Bishop Museum	He Aupuni Palapala: Preserving and Digitizing the Hawaiian Language Newspapers	\$ 500,000.00	\$ 500,000.00	5/12/2020	3/31/2021
17029 S12	Hawai'i Visitors and Convention Bureau	USA MMA 2020	\$ 500,000.00	\$ 97,560,000.00	5/19/2020	12/31/2021
•18200 S2	Native Hawaiian Hospitality Association	Native Hawaiian Hospitality Association 2020	\$ 450,000.00	\$ 1,340,000.00	5/28/2020	6/30/2021
•20184	University of Hawai'i at Mānoa, Shidler College of Business, School of Travel Industry Management	Ho'oilina Scholarship Program	\$ 408,000.00	\$ 408,000.00	3/12/2020	6/30/2023
17227 S3	UH Office of Reserch Services	Customer Service and Tour Guide Certification Training	\$ -	\$ 311,600.00	6/5/2020	5/15/2020
20023 S1	Ki-ho'alu Foundation	Hawaiian Slack Key Guitar Festivals	\$ (13,000.00)	\$ 25,000.00	5/26/2020	3/31/2021
18178 S3	Kloninger & Sims Consulting LLC	Visitor Plant Inventory Survey 2020	\$ (21,053.04)	\$ 271,446.96	6/1/2020	1/31/2021
20179 S1	University of Hawai'i	Rapid 'Ōhi'a Death Seed Banking Initiative 2020	\$ (30,000.00)	\$ 30,000.00	6/8/2020	3/31/2021
•19170 S1	The Hawai'i Lodging & Tourism Association (Hawai'i Hotel Industry Foundation)	Ho'oilina Scholarship Program	\$ (52,000.00)	\$ (22,000.00)	6/12/2020	6/30/2023
20172 S1	DLNR - Division of Forestry and Wildlife	Alaka'i Boardwalk Replacement & Trailhead Interpretive Signs	\$ (59,000.00)	\$ 59,000.00	6/8/2020	3/31/2021
20177 S1	DLNR - Division of Forestry and Wildlife	Mokuhāli'i: Covering the Islands in the Rapid 'Ōhi'a Death Outreach Network	\$ (74,000.00)	\$ 74,000.00	6/9/2020	3/31/2021
17028 S8	a.Link LLC	Japan MMA	\$ (4,000,000.00)	\$ 33,990,000.00	6/1/2020	12/31/2020
			\$ 10,075,201.96			

Contract Type:
 • Sole Source
 † Procurement
 Exemption



5

Presentation by HTA and Hawaii State Department of Transportation on the Current 14-Day Mandatory Quarantine Process for Arriving Passengers at Hawaii's Airports. Presentation will Include and Overview of Data Collection, Screening, Verifying, Scanning, Database, and the Call Center

COVID-19 Support Mission

Serving as a partner in support of the HI-EMA COVID-19 response

COVID-19 Support

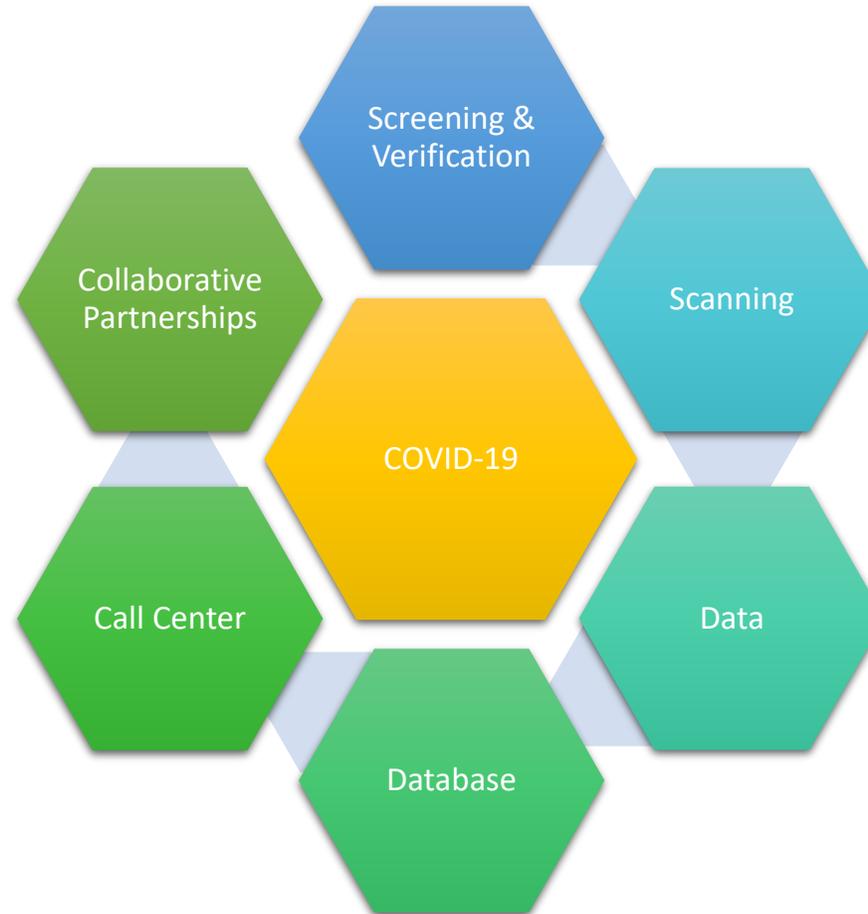
Direct

- Scanning
- Database
- Data Distribution
- Call Center
- Digital Data Collection Tool
- Equipment

Indirect

- Screening
- Verification

COVID-19 Quarantine Ecosystem



Airport Processes



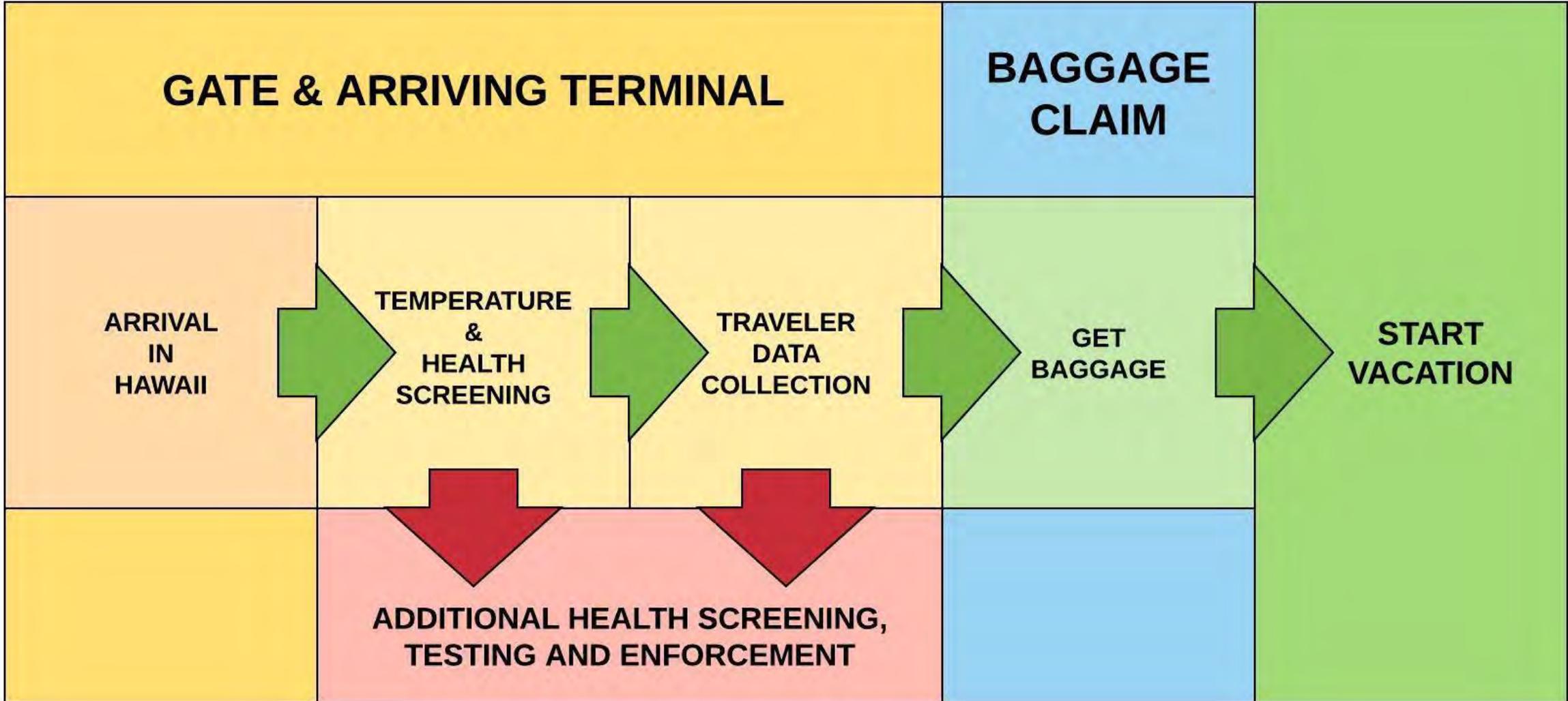
PASSENGER SCREENING &
VERIFICATION



SCANNING OF
DOCUMENTS



DATA





Screening & Verification

Contracted Support for DOT

DAVID Y. IGE
GOVERNOR OF HAWAII

KENNETH S. HARA
DIRECTOR

STATE OF HAWAII
HAWAII EMERGENCY MANAGEMENT AGENCY
3948 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 (HEMA) hereby orders you to comply with the following:

- Fully complete and sign the mandatory State of Hawai'i Department of Agriculture Plants and Animals Declaration Form or the Interisland Declaration Form.
(initial)
- 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 I.
 - If you are a resident, your designated quarantine location is your residence.
 - If you are a visitor, your designated quarantine location is your hotel room or rented lodging.
(initial)
- 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.
 - You may leave your designated quarantine location only for medical emergencies or to seek medical care.
(initial)
- Do not visit any public spaces, including but not limited to pools, meeting rooms, fitness centers or restaurants.
(initial)

Rev. 4/6/2020

MANDATORY TRAVEL DECLARATION FORM
FOR ALL PASSENGERS, OFFICERS, AND CREW MEMBERS
The State of Hawai'i hereby requests and requires all travelers for public health and safety. It is required that all travelers provide the information below. Hawaii Revised Statutes Section 127A-12 and 127A-13.

Complete one per person.

TRAVELER NAME:
First Name _____ Middle Initial(s) _____
Last Name _____

HOME ADDRESS:
Number and Street _____
City/Town _____ State _____ Zip/Postal Code _____ Country _____

CONTACT TELEPHONE IN HAWAII:
Primary (_____) (_____) - _____ Secondary (_____) (_____) - _____

FLIGHT INFORMATION:
Arriving Airline _____ Flight No. _____ Travel Date (MM-DD-YY) _____
Departing Airline _____ Depart Flight No. _____ Depart Date (MM-DD-YY) _____

DESTINATION LOCATION:
Purpose of Visit:
 Vacation Returning Resident Visiting Family/Friends Business Relocate to HI
Hotel/Lodging Name _____
Number and Street (no PO Box) _____
City/Town _____ State _____ Zip/Postal Code _____ Country _____
How did you make your reservation?
 Directly with Hotel Travel Agent On-line Booking, through _____
Destination Phone Number _____ Duration of visit _____ No. of minors in party _____
(_____) (_____) - _____ _____ nights _____
Government ID Type:
 Passport Driver's License/ID Card Visa Other _____ ID No. _____
Signature _____ Date _____

OFFICIAL SCREENER USE ONLY:
Exemption Status
 Military Airline Crew Exempt, Exemption Reference? _____
Revised: 05/19/2020

- HTA-supported contractor support
- Honolulu, Kona, and Maui
- Roberts, Worldwide Flight Services, Anthology, OmniTrak
- Managed in partnership with DOT-Airports
- Primarily at gates for CONUS/INT
- Interisland support outside sterile area

Scanning & Data



- Operational since March 26th
- Located at DKI/HNL
- Operates 7-days/week
- 4-6 team members
- High-demand, labor intensive, critical for tracing efforts

Database Development

- Secure
- Scalable
- Flexible
- Broad Acceptance & Familiarity
- Trusted Platform
- Vendor with Longevity/Staying Power





World Map



U.S. Map



Critical Trends

COVID-19 United States Cases by County Johns Hopkins University

States/Territories Please select from list County (or Equivalent) Please select from list

Top 50 Confirmed Cases by County

87,177 confirmed
Cook

83,414 confirmed
Los Angeles

63,912 confirmed
Queens

58,085 confirmed
Kings

47,087 confirmed
Bronx

41,479 confirmed
Nassau

40,972 confirmed
Suffolk

34,521 confirmed
Westchester

30,138 confirmed
Maricopa



Confirmed by Population Confirmed Deaths Fatality Rate

Last Updated on:
2020-06-21

Data is updated once per day to allow the system to pull county-level data. For the most up-to-date confirmed cases and deaths, please see the COVID-19 Global Map. New York City borough deaths data does not include Probable COVID-19 deaths, as this data is not reported.

Top 20 Counties by Number of Deaths

5,328 deaths
Kings

5,276 deaths
Queens

4,404 deaths
Cook

3,714 deaths
Bronx

3,121 deaths
Los Angeles

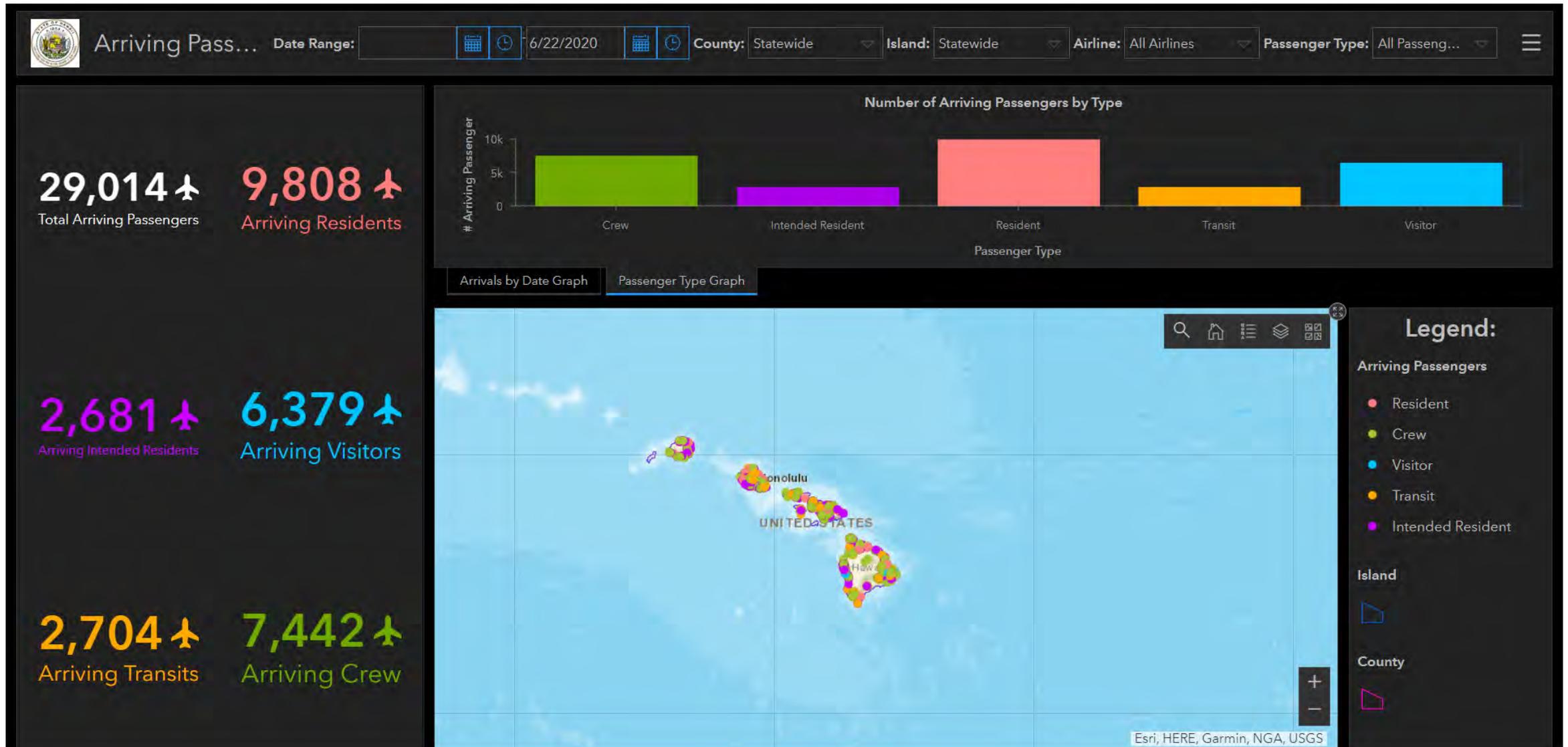
2,687 deaths
Wayne

2,410 deaths
New York



Confirmed Deaths

Dashboards & Tools





14 Day Traveler Tracker

All data derived from the State of Hawai'i Tourism Authority

County: **Statewide** City and County of Honolulu County of Hawaii County of Kauai County of Maui All Passenger Types

- Traveler First Name: [Redacted]

Last update: 20 minutes ago



Esri, HERE, Garmin, NGA, USGS

Call Center

- Operates between 9a and 8p (7-days/week)
- Contacting visitors and residents
- More than 85 trained agents
- Virtual / BYOD
- Partnership with HVCB, DOT, and HTA
- More than 36,000 calls since March

Collaborative Partnerships



Partnership with
stakeholders



Counties



Law
Enforcement

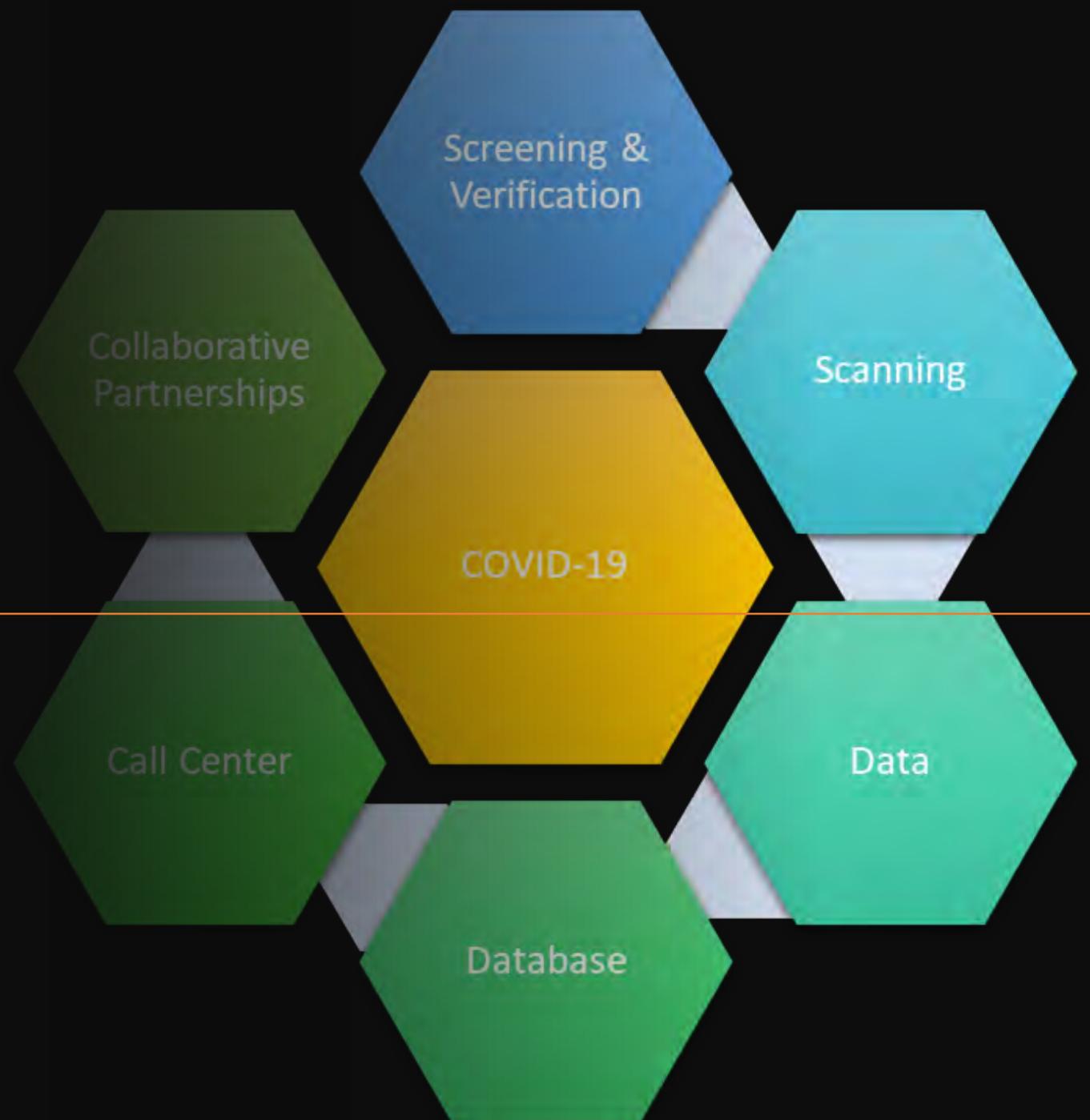


State Agencies



Senior
Leadership

Questions?





MANDATORY TRAVEL DECLARATION FORM

FOR ALL PASSENGERS, OFFICERS, AND CREW MEMBERS

The State of Hawaii actively screens and monitors all travelers for public health and safety.

It is required that all travelers provide the information below.

Hawaii Revised Statutes Section 127A-12 and 127A-13.

Complete one per adult.

TRAVELER NAME:

First Name

Middle Initial(s)

[Grid for First Name]

[Grid for Middle Initial(s)]

Last Name

[Grid for Last Name]

HOME ADDRESS:

Number and Street

[Grid for Number and Street]

City/Town

State

Zip/Postal Code

Country

[Grid for City/Town]

[Grid for State]

[Grid for Zip/Postal Code]

[Grid for Zip/Postal Code]

[Grid for Country]

CONTACT TELEPHONE IN HAWAII:

Primary

Secondary

[Grid for Primary Phone]

[Grid for Secondary Phone]

FLIGHT INFORMATION:

Arriving Airline

Flight No.

Travel Date (MM-DD-YY)

[Grid for Arriving Airline]

[Grid for Flight No.]

[Grid for Travel Date]

Departing Airline

Depart Flight No.

Depart Date (MM-DD-YY)

[Grid for Departing Airline]

[Grid for Depart Flight No.]

[Grid for Depart Date]

DESTINATION LOCATION:

Purpose of Visit:

- Vacation
- Returning Resident
- Visiting Family /Friends
- Business
- Relocate to HI

Hotel/Lodging Name

[Grid for Hotel/Lodging Name]

Number and Street (no PO Box)

[Grid for Number and Street]

City/Town

State

Zip/Postal Code

Country

[Grid for City/Town]

[Grid for State: HI]

[Grid for Zip/Postal Code]

[Grid for Zip/Postal Code]

[Grid for Country: US]

How did you make your reservation?

- Directly with Hotel
- Travel Agent
- On-line Booking, through _____

Destination Phone Number

Duration of visit

No. of minors in party

[Grid for Destination Phone Number]

[Grid for Duration of visit]

[Grid for No. of minors in party]

Government ID Type:

ID No.

- Passport
- Driver's License/ID Card
- Visa
- Other

[Grid for ID No.]

Signature _____

Date _____

OFFICIAL SCREENER USE ONLY:

Exemption Status

- Military
- Airline Crew
- Exempt, Exemption Reference? _____

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, and that all information provided herein is true and accurate, including but not limited to the information I provided pursuant to paragraph 1, including my designated quarantine location and telephone number.

(Print Name)

(Signature)

(date)

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

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

(Screener Signature)

Screener AOA or Company Number



STATE OF HAWAII
DEPARTMENT OF DEFENSE
OFFICE OF THE DIRECTOR OF EMERGENCY MANAGEMENT
3949 DIAMOND HEAD ROAD
HONOLULU, HAWAII 96816-4495

March 31, 2020

ORDER FOR ARRIVING PERSONS
TRAVELING WHO ARE EXEMPT FROM 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. The Governor expressly excepted from this mandatory self-quarantine persons traveling interisland related to medical or health care as well as persons performing functions necessary to maintain continuity of operations of the federal critical infrastructure sectors so long as they submit to thermal screening upon arrival, wear appropriate protective gear and follow the social distancing requirements.

Pursuant to the Governor's March 31, 2020 proclamation, the Director of the Hawai'i Emergency Management Agency (HIEMA) hereby orders you to comply with the following:

1. Submit to thermal screening upon arrival onto the island.
2. Wear appropriate protective gear for the next 14 days.
3. Comply with all social distancing requirements set forth in the Governor's March 23, 2020 proclamation, which include:
 - a. Six-foot distances. All persons shall maintain a minimum of six-feet of physical separation from all other persons to the fullest extent possible. Essential businesses and operations shall designate with signage, tape, or by other means six-foot spacing for employees and customers in line to maintain appropriate distance.
 - b. Hand sanitizer and sanitizing products. Essential businesses and operations shall make hand sanitizer and sanitizing products readily available for employees and customers.

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.



MANDATORY STATE OF HAWAII TRAVEL AND HEALTH FORM FOR ALL PASSENGERS AND CREW MEMBERS

The State of Hawai'i actively screens and monitors travelers for public health and safety. It is required that all travelers provide the information below. Hawai'i Revised Statutes Section 127A-12 and 127A-13

(For children 17 years and younger traveling with a parent/guardian please fill out first name, last name, birthdate, and Health History Parts 1 and 2 only, and sign on behalf of the child.)

TRAVELER INFORMATION:

First Name [grid] Middle Initial(s) [grid]

Last Name [grid]

Home Address Number and Street [grid]

City [grid] State [grid] Zip Code [grid] - [grid] OR Country: [grid]

Contact Telephone in Hawai'i - Primary ([grid]) [grid] - [grid] Contact Telephone in Hawai'i - Secondary ([grid]) [grid] - [grid] Country of Citizenship: [grid]

Email Address: _____ Gender (optional) Male Female Non-Binary Birthdate (MM/DD/YYYY) [grid] / [grid] / [grid] Race (optional): American Indian/Alaska Native Other Pacific Islander Asian White Black/African-American Other Native Hawaiian What industry do you work in? (e.g., health, construction, retail) _____ What is your occupation? _____

Have you signed a 14-day quarantine order that is currently in effect? Yes No

FLIGHT INFORMATION: This information, along with your name and contact information, may be used for contact tracing, as well as quarantine enforcement.

Departure: Airline [grid] Flight No. [grid] Travel Date (MM/DD/YY) [grid] / [grid] / [grid]

Return: Airline [grid] Flight No. [grid] Travel Date (MM/DD/YY) [grid] / [grid] / [grid]

Destination Address or Hotel Name [grid]

City [grid] State HI Zip Code [grid] - [grid]

TRAVEL INFORMATION:

Have you traveled outside the State of Hawai'i in the last 14 days? Yes No

Where? When? Country or State: _____ From (MM/DD/YY) [grid] / [grid] / [grid] To (MM/DD/YY) [grid] / [grid] / [grid] Country or State: _____ From (MM/DD/YY) [grid] / [grid] / [grid] To (MM/DD/YY) [grid] / [grid] / [grid] Country or State: _____ From (MM/DD/YY) [grid] / [grid] / [grid] To (MM/DD/YY) [grid] / [grid] / [grid]

HEALTH HISTORY (PART 1)

Do you feel ill now? Yes No (Skip to Health History Part 2)

Are you feeling any of these symptoms now?

	Yes	No		Yes	No
Fever	<input type="radio"/>	<input type="radio"/>	Vomiting	<input type="radio"/>	<input type="radio"/>
Chills	<input type="radio"/>	<input type="radio"/>	Diarrhea	<input type="radio"/>	<input type="radio"/>
New cough	<input type="radio"/>	<input type="radio"/>	Skin rash	<input type="radio"/>	<input type="radio"/>
Sore throat	<input type="radio"/>	<input type="radio"/>	Loss of taste or smell	<input type="radio"/>	<input type="radio"/>
Headache	<input type="radio"/>	<input type="radio"/>	Tiredness/fatigue	<input type="radio"/>	<input type="radio"/>
Runny or stuffy nose	<input type="radio"/>	<input type="radio"/>	Muscle ache	<input type="radio"/>	<input type="radio"/>
Shortness of breath	<input type="radio"/>	<input type="radio"/>	Chest pain or pressure	<input type="radio"/>	<input type="radio"/>

Have you taken medicine to bring down fever? (e.g., Tylenol or ibuprofen)

Yes No

HEALTH HISTORY (PART 2)

Were you ever in contact with a person confirmed to have COVID-19?

Yes No

When? (MM / YY)

/

Have you ever been tested for COVID-19?

Yes No

When? (MM / YY)

/

Have you had a flu vaccine in the last year?

Yes No

Date of vaccination? (MM / YY)

/

In what country?

ATTESTATION:

I declare under penalty of law that all the information provided herein is true and correct to the best of my knowledge and belief.

(Signature)

(Date)

(Print Name)

On behalf of a minor, 17 years or younger.

The information on this form will be used for Department of Health purposes and will be treated as confidential information. The information will be used, to the extent deemed necessary by the department, for the detection of a communicable or dangerous disease and for related prevention, investigation, monitoring, quarantine or isolation.

6

Presentation and Adoption of the Aina Aloha Economic Futures Declaration and of their 4-Step Process of Taking Action to Bring Life a Resilient Economy Through our Core Value of aina aloha-a Deep and Abiding Love for Hawaii's Communities and Natural Environment

An aerial photograph of ocean waves with white foam, viewed from above. A large white triangle is superimposed on the image, pointing towards the top-left corner. The text is positioned within the white area of the triangle.

'Āina Aloha Economic Futures

HTA BOARD PRESENTATION: JUNE 25, 2020



Mahina Paishon-Duarte

Educator; Community Organizer

Nā'ālehu Anthony

Filmmaker; Media & Communications Consultant



Context and Perspective Moving Forward

- This **defining moment** will impact us for decades.
- Embedded in all of this is a tremendous **opportunity**.
- The **values** we embrace as a State will unify us.



'Āina Aloha Economic Futures **DECLARATION**

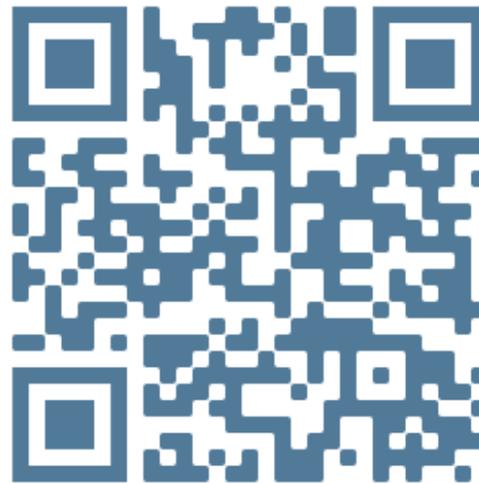
Guiding Principles Grounded in our Shared Values

- **'Āina Aloha:** Our economic strategies prioritize our kuleana to steward our precious natural resources.
- **'Ōpū Ali'i:** Our leaders understand that the privilege to lead is dependent on those they serve.
- **'Imi 'Oī Kelakela:** We are driven by creativity and innovation that enhances our way of live.
- **Ho'okipa:** We manage our resources in a way that allows us to fulfill our role as hosts.



Four-Step Community Engagement Process

www.ainaalohafutures.com



Four-Step Community Engagement Process

www.ainaalohafutures.com

The screenshot displays the homepage of the 'Āina Aloha Economic Futures' website. At the top, there is a navigation bar with the following links: 'Āina Aloha ECONOMIC FUTURES', 'DECLARATION', 'ACTION AGENDA', 'PROPOSALS', and 'MOVE'. Below the navigation bar, the main heading reads 'Āina Aloha ECONOMIC FUTURES'. A sub-heading states: 'Join thousands of Hawai'i community members, businesses, and organizations as we engage in a 4-step process of taking action to bring to life a resilient economy through our core value of 'āina aloha—a deep and abiding love for Hawai'i communities and natural environments.' Below this text is a button labeled 'Add Your Name' with a 'Done' button underneath. The main content area is divided into four vertical columns, each representing a step in the process:

- Step 1: Declare Core Values**
Read the 'Āina Aloha Economic Futures' Declaration submitted to Governor Ige and Alan Ōshiro's group tasked with developing and implementing a plan for economic stabilization, recovery, and resilience.
- Step 2: Set an Action Agenda**
The 'Āina Aloha Action Agenda' offers concrete goals to rebuild our economy in keeping with the principles in the Declaration. Community members like you were encouraged to review and suggest changes to it. Hundreds of suggestions were implemented and a [Declaration Action](#) is now available.
- Step 3: Develop Proposals**
Once the Action Agenda is adopted, a rubric will be developed that can guide decisions by policy makers, businesses, organizations, and community members about Hawai'i's economic future. Online work sessions will be held to develop specific proposals. Sign-ups for the online work sessions will open in mid-June.
- Step 4: Move Forward**
Build coalitions with other entities advancing similar proposals, provide the rubric to decision makers, businesses, organizations, and community members, and together take action to achieve the changes in an economic future grounded in 'āina aloha.



Four-Step Community Engagement Process

1. **Declaration** Support:

- 800+ signatories in 2 weeks (May)

2. **Huliau Action Agenda** Community Draft and Support:

- 200+ responses with suggested changes
- 400+ additional signatories in 10 days (June)



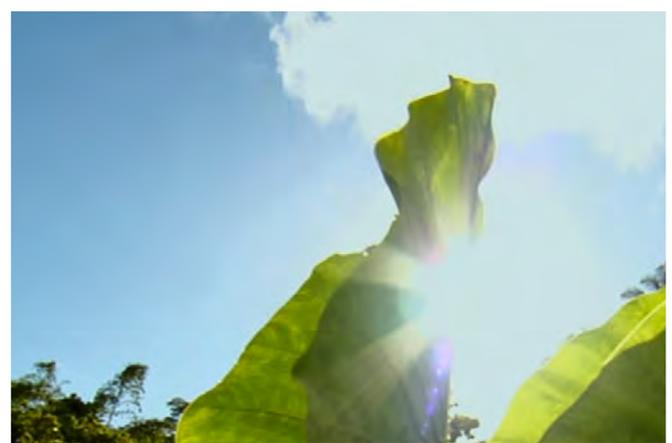
Four-Step Community Engagement Process

3. Develop **Proposals**:

- Rubric to guide alignment of proposals with principles and agenda
- Online work sessions ****July 1, 2010****

4. Move **Forward**:

- Build coalitions with similar efforts
- Provide rubric
- Take collective action towards change



Mana'o a Nīnau?

Mahalo nui loa!

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Nā'ālehu
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'Āina Aloha Economic Futures

HTA BOARD PRESENTATION: JUNE 25, 2020



Step 1 : Declare core values

Introduce core values that will guide our work in building a regenerative and resilient economy.

Step 2: Set an Action Agenda

Develop a framework of actionable goals that will guide community proposals

Step 3: Develop Proposals

Gather and prioritize a community-driven set of proposals.

Step 4: Move forward

Join with others and together forward shared proposals.

‘Āina Aloha Economic Futures Declaration

A Call for Unity

Every crisis opens a course to opportunity. Some of the world’s greatest accomplishments were born from adversity by those who were inherently equipped with vision and resolve. The COVID-19 pandemic will leave a saga of sorrow, loss and frustration with an equal and overwhelming amount of sacrifice, heroism and victory. This “new normal” has thrust us into what our kūpuna Hawai‘i would call a *huliau*, or a turning point and time of change, for all of us who call Hawai‘i home.

While we are reeling from this visceral reminder of how vulnerable we are to external impacts on our *‘āina aloha*, or beloved homeland, our history as a resilient people is undeniable. The Native Hawaiian community in particular is one that for centuries has fought to overcome obstacles that all of us here in Hawai‘i are now faced with. Whether rebounding from infectious disease that decimated our population or successfully advocating for equitable remedies from government systems, these challenges are today ones that we confront as a collective.

Now perhaps more than ever, the ancestral values that guided us through these challenges and numerous others provide a pivotal leverage point for all of us as we set a course towards a stronger, sustainable Hawai‘i and seize this opportunity for *huliau*.

Guiding Principles:

- **‘Āina Aloha:** We are of and from this ‘āina that ultimately sustains us. We employ strategies for economic development that place our kuleana to steward precious, limited resources in a manner that ensures our long-term horizon as a viable island people and place.
- **‘Ōpū Ali‘i:** Our leaders understand that their privilege to lead is directly dependent on those they serve. From the most vulnerable to the most privileged, we seek to regenerate an abundance that provides for everyone. Decision makers understand and embrace their duty and accountability to Community. Our social, economic and government systems engage and respond to a collective voice in integrative ways to balance power and benefit.
- **‘Imi ‘Oī Kelakela:** We are driven by creativity and innovation, constantly challenging the status quo. We are mindful and observant of needs, trends and opportunities and seek new knowledge and development opportunities in ways that enhance our way of life without jeopardizing our foundation of ‘āina aloha.

- **Ho‘okipa:** We are inclusive and embrace the collective that will call Hawai‘i home, grounded in the fundamental understanding that it is our kuleana to control and manage our resources in a way that allows us to fulfill our role as hosts here in our ‘āina aloha.

Future Directions

These principles will calibrate our course not only to recovery but rediscovery of our potential as a unique people and place. Over the past five decades, we have seen local, national and international models of social, educational, agricultural and economic resiliency emerge from our Hawaiian community. This is due in no small part to a grounding in these foundational values. We have been here for millennia and will be for many more. There is nowhere else we could or would choose to be. We are committed to this kuleana of ‘āina aloha and ensuring the sustainability of this place and those who choose to make it home.

As we seek to engage at decision making tables, adding value and insight to Hawai‘i’s economic path forward post COVID-19, we implore and invite you to support and engage with us ([view and comment on the action agenda](#)). From healthcare, education and digital innovation to food security, tourism, and affordable housing strategies, we are mākaukau for this imminent *huliau!*

Collaborative authors¹

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Mahinapoeopoe Paishon-Duarte

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Ulalia Woodside

Signatories

(Visit ainaalohafutures.com/declaration to view all 800+ signatories.)

¹ This declaration was drafted by a group of Native Hawaiian community members who came together organically after separate discussions brought forth common sentiments regarding the need to have Native Hawaiian voices, values, and experiences influence the economic recovery for our ‘āina aloha. The signatories listed reflect the interconnected and overlapping roles that individuals, ‘ohana, organizations, coalitions, and networks play in our communities. This working document serves as a starting point to facilitate broader engagement and collective action in support of our shared principles.

Step 1 : Declare core values

Introduce core values that will guide our work in building a regenerative and resilient economy.

Step 2: Set an Action Agenda

Develop a framework of actionable goals that will guide community proposals

Step 3: Develop Proposals

Gather and prioritize a community-driven set of proposals.

Step 4: Move forward

Join with others and together forward shared proposals.

Huliau Action Agenda

In this time of hulihiā, where long-standing systems are overturned and our vulnerabilities are laid bare, we have a rare opportunity to shift mindsets and forward plans for a stronger and more sustainable Hawai‘i founded on ‘āina aloha—a deep and abiding love for Hawai‘i’s communities and natural environments. Central to this effort is the ability of our community to determine the direction of our huliau, our turning point towards positive transformation.

Below is a high-level framework of community-defined actionable goals intended to guide the development and prioritization of more specific proposals:

‘Āina Aloha¹

We affirm that Native Hawaiian culture and perspectives are strengths in rebuilding a **resilient Hawai‘i**, and we seek to:

1. Place as a top priority the well-being of our ‘āina, water sources, oceans, skies, and the biodiversity integral to these, recognizing the long held understanding that the ‘āina is our ali‘i, and we are its servants.
2. Exercise the traditional and cultural rights of ‘Ōiwi Hawai‘i and place ‘ike kūpuna as a foundation upon which we determine our actions.
3. Empower in decision making circles those whose life work embodies the wisdom of the first and highly successful stewards of Hawai‘i, especially when such decisions affect our natural environment and the cultural practices that take place in its embrace.
4. Assert collective kuleana to restore degraded environments, sustainably manage human-occupied spaces, and protect the vibrancy of intact ecosystems.
5. Recognize, as is occurring worldwide, that Indigenous perspectives, insights, and genealogical connections to place are essential to ensuring environmental vibrancy and community cohesion.

¹ We are of and from this ‘āina that ultimately sustains us. We employ strategies for economic development that place our kuleana to steward precious, limited resources in a manner that ensures our long-term horizon as a viable island people and place.

6. Address historical and current injustices against ‘Ōiwi Hawai‘i, including water rights and issues related to historical hoā‘āina or land tenant rights.
7. Honor the fact that ‘Ōiwi Hawai‘i are a living, evolving people whose well-being is central to Hawai‘i’s continued vitality and that collective well-being is intrinsically tied to the health and well-being of our ‘āina.
8. Recognize that climate change is creating a future with new challenges and difficulties, requiring the development of solutions grounded in principles of resiliency, sustainability, and the Hawaiian concept of ‘āina aloha, or beloved homeland.

We embrace inclusivity as a foundational aspect of our culture in Hawai‘i to:

1. Honor the roles of ‘ōiwi, kama‘āina, and newer residents alike, who have demonstrated our deep aloha for Hawai‘i and its communities by fulfilling our kuleana of being strong contributors to Hawai‘i’s vitality for our communities today and for the generations to come.
2. Advance economic equity as well as social and political justice for all.
3. Support Hawai‘i stakeholders who embody the values of ‘āina aloha to be heard in discussions determining the future of Hawai‘i.
4. Facilitate opportunities for those who may not yet have become integrated into Hawai‘i’s cultural milieu to experience and support the values of ‘āina aloha.

‘Imi ‘Oī Kelakela²

We apply innovation and creativity to support the well-being of our islands and communities. We share principles, perspectives, and knowledge inherited from past generations of Hawai‘i that are useful to guide us into the future. We cannot depend on an economy that is unsustainable and degrades our natural and social environments. Instead, we will:

1. Create a strong, self-sustaining economy in Hawai‘i that:
 - a. Is resilient to worldwide economic downturns,
 - b. Embodies ‘āina aloha,
 - c. Rejects notions of consumerism and materialism to improve household viability and long-term environmental sustainability,
 - d. Strengthens our environments including, but not limited to, our reefs, oceans, streams, forests, air, soil, and endangered species so they are resilient to climate change,
 - e. Restores ‘āina that has been environmentally degraded by historic misuse and neglect,
 - f. Utilizes natural climate solutions,

² We are driven by creativity and innovation, constantly challenging the status quo. We are mindful and observant of needs, trends and opportunities and seek new knowledge and development opportunities in ways that enhance our way of life without jeopardizing our foundation of ‘āina aloha.

- g. Creates clean renewable energy,
 - h. Ensures our ability to be sustained by fertile lands and seas realized in increased local food production and food independence.
 - i. Promotes leadership and innovation to increase energy and food sustainability.
 - j. Seeks out successful models from around the world that can be applied in Hawai‘i.
2. Develop a circular economy as part of established global efforts to:
 - a. Decouple economic growth from environmental degradation,
 - b. Engage regenerative practices that design out waste,
 - c. Provide for meaningful work and livable wages, and
 - d. End the practices in the current economic system that have given rise to vast social and economic inequity.
 3. Establish a housing market that prioritizes resident access to affordable homes and eliminate the incentives and structural barriers that place and price homes out of their reach.
 4. Invest in our youth, and those ready to expand their skills, to build their capacity to care for our islands and work towards community and environmental resilience.
 5. Cultivate partnerships with communities, the business sector, and the military aimed at nurturing the well-being of our islands and its people by restoring previously degraded environments and eliminating practices that would inflict further damage.
 6. Facilitate alternative energy projects that are planned with collaborating communities and that engender strong community support in the localities where they would be implemented.
 7. Engage technologies to improve access to healthcare, education, and government services, and enable a tele-workforce resulting in reduced traffic and carbon emissions and a better work-life balance for the tele-workforce.
 8. Measure the success of decisions, policies, programs, etc. by the health and well-being of natural environments and communities that are impacted by them.

Ho‘okipa³

We recognize that ho‘okipa (hospitality) requires that the mea ho‘okipa (host) have access to adequate space, place, and resource to truly fulfill the role and function of ho‘okipa. For the fullness of this **reciprocal relationship** between mea ho‘okipa and malihini (visitor) to be realized we must:

1. Ensure that we as a local community have the means to fulfill our kuleana to our ‘āina and each other before fully assuming the kuleana of mea ho‘okipa.
2. Hold malihini accountable within the reciprocal nature of the relationship established once they are here with us in Hawai‘i. “Ho‘okahi wale nō lā o ka malihini” expresses the fundamental concept

³ We are inclusive and embrace the collective that will call Hawai‘i home, grounded in the fundamental understanding that it is our kuleana to control and manage our resources in a way that allows us to fulfill our role as hosts here in our ‘āina aloha.

that a visitor is “a stranger for only a day.” After the first day, the malihini becomes a *hoa kama‘āina* or familiar friend and should quickly assume a *kuleana* (responsibility) to Hawai‘i’s people and place.

To achieve the above, we envision a *regenerative* visitor economy that:

1. Forms community partnerships to ensure Native Hawaiian cultural integrity by:
 - a. Supporting Hawai‘i’s people and communities and their efforts to *mālama ‘āina* (care for the land) and the cultural and natural resources of the ‘āina, oceans, streams, and skies.
 - b. Strengthening relationships between people and place, *kama‘āina* and *malihini* alike.
 - c. Engaging in collaborative efforts that provide visitors with genuine and meaningful experiences in Hawai‘i.
 - d. Ensuring that *kapu* and environmentally sensitive contexts are protected from visitor traffic.
 - e. Positioning local business owners and entrepreneurs in the economic value chain to ensure more meaningful *malihini-kama‘āina* engagement as well as economic benefit to local communities.
 - f. Acknowledging and, where appropriate, protecting Hawaiian cultural intellectual property, traditional knowledge, and traditional cultural expressions that contribute to Hawai‘i’s economy.
2. Employs Hawai‘i residents and commits to building their capacity and offering them career ladders to ultimately increase the percentage of Hawai‘i residents in management and leadership positions in the industry.
3. Applies innovative financial, policy, as well as data collection and analysis mechanisms to incentivize and facilitate a shift to a regenerative visitor industry that has a smaller footprint (e.g., decreasing impacts to beaches, reefs, and ocean life) and that aims to sustain and improve the quality of life for Hawai‘i residents (e.g., decreasing impacts of vacation rentals/B&Bs and rental cars).
4. Targets markets that have a high probability of alignment with the goal of cultivating a regenerative visitor industry.
5. Actively supports and encourages other emerging economic sectors to reduce the dependence on tourism to support Hawai‘i’s overall economic prosperity.

We believe that government, business, and community leaders should strive to create **healthy and safe communities**, engaging in work that:

1. Supports ‘ohana and communities engaging in traditional Hawaiian cultural practices, including subsistence, gathering, and family farming.
2. Provides access to beaches, forest areas, and other public lands for subsistence, gathering, cultural practices, and recreation, as mandated under the Hawai‘i State Constitution.
3. Establishes or maintains safe and accessible parks and community gathering spaces.
4. Commits to and grows a regenerative, circular, and zero waste economy to preserve Hawai‘i’s natural environment and ensure a clean sustainable future for generations to come.
5. Safeguards gender equity, race equity, and women’s, children’s, and LGBTQ rights that are honored in policies and everyday practices across our society.
6. Protects the community from sex-trafficking, prostitution, abusive labor practices, and other similar injustices.
7. Establishes living equitable wages and a healthy work-life balance.
8. Strives for a relatively stable cost of living in Hawai‘i.
9. Provides comprehensive quality universal health care, which includes mental health and substance abuse support.
10. Forwards policies that ensure safe workplaces with flexible work hours and telecommuting options.
11. Nurtures communities where essential health and safety professionals are integral, trusted members of the communities they serve.
12. Designs and funds clean, reliable, user-friendly, community-supported, and affordable public transportation.
13. Develops supports that foster ‘ohana well-being (e.g., longer paid maternity and paternity leave, programs that nurture strong and engaged parenting, anger management training, and access to affordable child and senior care centers).
14. Provides access to culturally appropriate conflict resolution supports for ‘ohana and communities.
15. Supports locally grown and sourced fresh food systems, including key cultural crops associated with Hawai‘i’s multicultural communities.

⁴ Our leaders understand that their privilege to lead is directly dependent on those they serve. From the most vulnerable to the most privileged, we seek to regenerate an abundance that provides for everyone. Decision makers understand and embrace their duty and accountability to Community. Our social, economic and government systems engage and respond to a collective voice in integrative ways to balance power and benefit.

16. Ensures quality universal education from preschool through higher education that nurtures confident, competent, and caring individuals who are connected to their communities and are inspired and enabled to contribute to Hawai'i's well-being.
17. Provides full support for renormalizing throughout the community the use of 'ōlelo Hawai'i, one of two official state languages.
18. Establishes equitable access to technology and broadband connectivity for work, education, and communication.
19. Creates reasonably priced housing in safe neighborhoods.
20. Adopts reasonable Hawai'i resident taxes on home properties and ancestral 'ohana lands.
21. Adopts new policies and taxes (e.g., restrictions on non-resident purchases of real estate, significant capital gains taxes on short term gains from speculative real estate sales) that eliminate opportunities or incentives for investors to purchase property in Hawai'i and inflate real estate costs for others.
22. Ensures that natural environments and communities are free from the impacts of harmful industrial electromagnetic fields, effluents, odors, sounds, and other forms of pollution.

We seek strong, compassionate, and educated leaders who:

1. Pass laws and ordinances that protect the 'āina, oceans, waterways, forests, and native species—the full breadth of our finite, irreplaceable natural environments.
2. Listen to and support the will of our communities, the people they represent.
3. Are committed to ensuring a positive future for our islands and communities by working selflessly alongside other similarly dedicated and focused business and community leaders.
4. Are knowledgeable about the inherent and legal rights of Native Hawaiians, the original inhabitants of these islands, and are committed to ensuring the full implementation of these rights that are codified in State and federal laws:
 - a. The Public Land Trust, of which 20 percent of its revenues should be appropriately calculated and directed to the betterment of Native Hawaiians, and
 - b. The Hawaiian Homelands homestead program, which must be appropriately funded and managed to provide its native Hawaiian beneficiaries residential, agricultural, or pastoral homesteads.
5. Investigate alternate economic paradigms, currencies, and measures of success that are tied to environmental and community well-being.
6. Work to balance the need for small agricultural entities to have affordable access to land and water and the need to foster healthy stream flows and ecosystems connected to those streams.
7. Honor community voices in developing carrying capacities and limitations for industries and sensitive environmental, historic, and cultural contexts.
8. Generate and implement fresh, innovative approaches and systems to achieve economic and food self-reliance.
9. Provide a framework of environmental policies, including tax incentives, grants, and other supports that enable agri-businesses and small farms to remain economically viable while being

good land stewards that minimize negative environmental impacts (e.g., waste and effluent discharge) and that improve the long-term fertility of the lands under their care (e.g., syntropic and organic farming, composting, and soil development).

10. Develop energy and waste policies and systems (e.g., buy-back agreements where utility companies compensate households and communities that generate energy) to directly facilitate increased self-reliance for households and communities (i.e., the European model).
11. Create incentives (e.g., tax breaks or credits and affordable credit and capital) and supports (e.g., assistance with transportation, distribution, and marketing systems) for small businesses, cottage and creative industries, and other community entities that are locally-owned and are regenerative and not extractive.
12. Ensure that economic gains accrued by large industries operating in Hawai'i are not exported out of Hawai'i but positively impact locally owned businesses and communities.
13. Balance Hawai'i's economic foundation across various income contribution sectors to avoid an over reliance on any one area.
14. Support Native Hawaiians' self-determination.

The framework of goals articulated in this Huliau Action Agenda set the context for a healthier, more cohesive, and sustainable Hawai'i guided by 'Ōiwi insights, innovation, and community values. Together we stand committed to engaging the urgent work needed to bring this vision to fruition.

[\(Opt-out\)](#)

Glossary

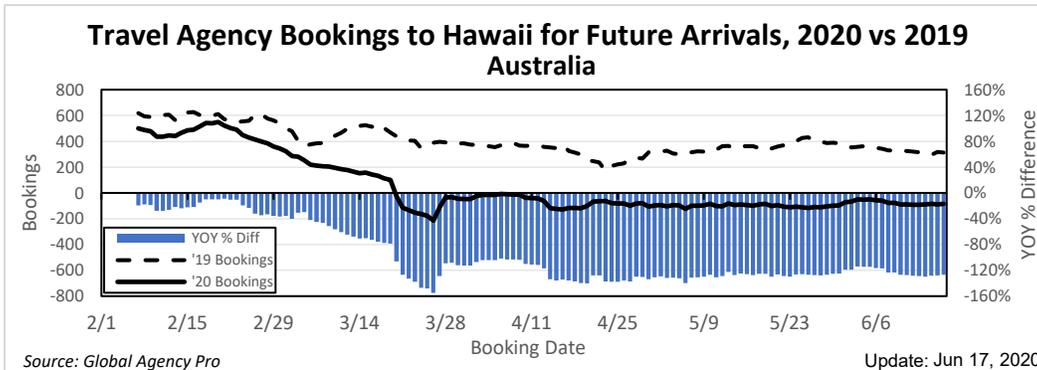
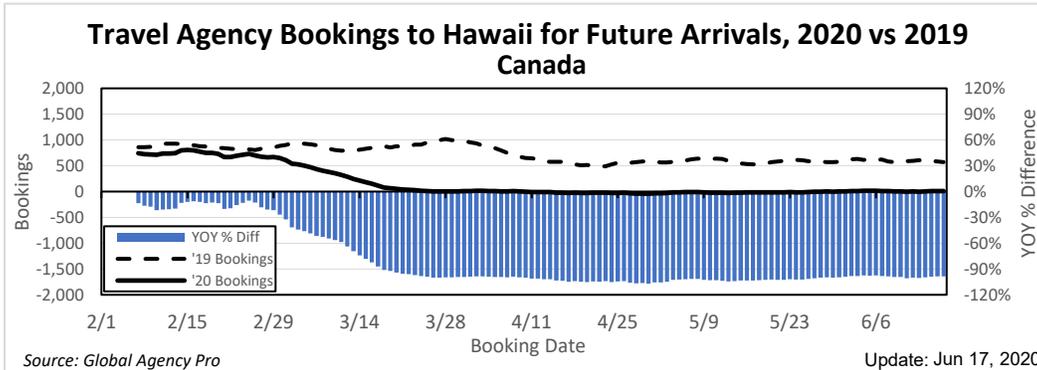
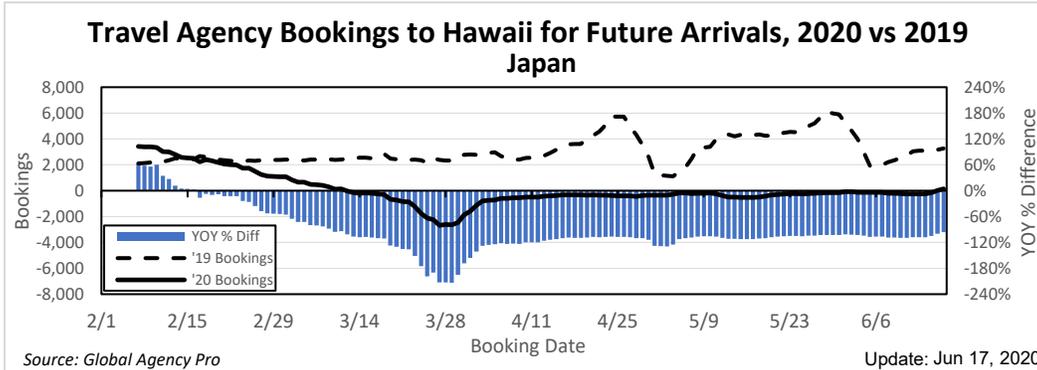
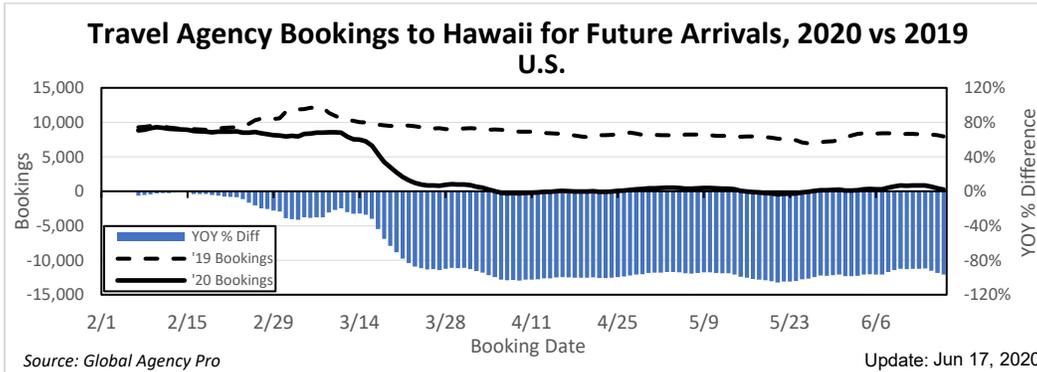
‘āina aloha	A deep and abiding love for Hawai‘i’s communities and natural environments. We are of and from this ‘āina that ultimately sustains us. We employ strategies for economic development that place our kuleana to steward precious, limited resources in a manner that ensures our long-term horizon as a viable island people and place.
‘ai pono	Healthy, nutritious foods
ali‘i	Chief, chiefess, officer, ruler, monarch, headman, noble, aristocrat, king, queen, commander
hoa ‘āina	Aboriginal, native tenants who held a suite of kuleana, including land ownership rights that were ignored after the 1893 illegal overthrow of the Hawaiian Kingdom
ho‘okipa	Gracious hospitality. We are inclusive and embrace the collective that will call Hawai‘i home, grounded in the fundamental understanding that it is our kuleana to control and manage our resources in a way that allows us to fulfill our role as hosts here in our ‘āina aloha.
huliau	Turning point, time of change
hulihia	Overtaken; a complete change, overthrow; turned upside down
‘ike kūpuna	Ancestral insights, knowledge, perspectives, practices, skills, senses
‘imi ‘oi kelakela	To seek the pinnacle of excellence. We are driven by creativity and innovation, constantly challenging the status quo. We are mindful and observant of needs, trends and opportunities and seek new knowledge and development opportunities in ways that enhance our way of life without jeopardizing our foundation of ‘āina aloha.
kama‘āina	Native-born, one born in a place, host
kapu	A place, natural element, plant or animal, person, act, object, verbal expression, or concept that is not open or free for all to engage in or experience. It is sacred, restricted, and off-limits.

kuleana	Responsibility, right, privilege, concern, title, business, property, estate, portion, jurisdiction, authority, liability, interest, claim, ownership, tenure, affair, province.
malihini	A tourist or guest; one unfamiliar with a place or custom
mea ho‘okipa	A host or one who extends hospitality to another
‘ohana	Family, relative, kin group
‘Ōiwi Hawai‘i	Aboriginal Hawaiians whose direct lineal ancestors were present in Hawai‘i in 1778
‘ōlelo Hawai‘i	Hawaiian language
‘ōpū ali‘i	Pono leadership in earlier times recognized the reciprocal relationship between leaders and the people they serve. ‘Ōpū Ali‘i highlights the actions of leadership that are benevolent and create balance in society. Our leaders understand that their privilege to lead is directly dependent on those they serve. From the most vulnerable to the most privileged, we seek to regenerate an abundance that provides for everyone. Decision makers understand and embrace their duty and accountability to Community. Our social, economic and government systems engage and respond to a collective voice in integrative ways to balance power and benefit.
pono	Goodness, uprightness, morality, moral qualities, correct or proper procedure, excellence, well-being, prosperity, welfare, benefit, behalf, equity, sake, true condition or nature, duty; moral, fitting, proper, righteous, right, upright, just, virtuous, fair, beneficial, successful, in perfect order, accurate, correct, eased, relieved; should, ought, must, necessary

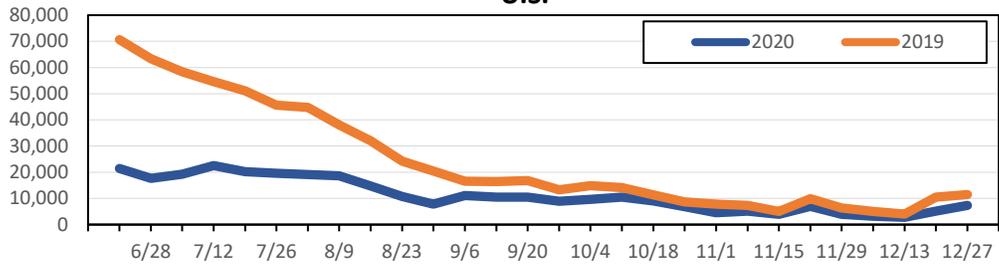
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Presentation and Discussion of Current Market Insights and Conditions in Hawaii and Key Major Hawaii Tourism Markets, Including the United States, Japan, Canada, Oceania, Other Asia, Europe, and Cruise

Market Insights – May 2020

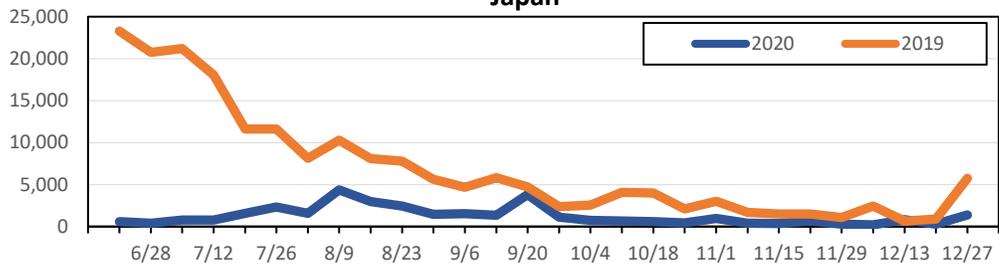


Travel Agency Bookings for Future Travel to Hawai'i as of June 17, 2020
U.S.



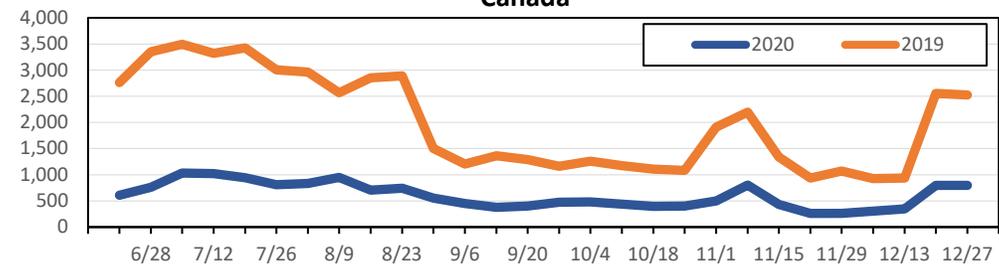
Source: Global Agency Pro, as of June 17, 2020

Travel Agency Bookings for Future Travel to Hawai'i as of June 17, 2020
Japan



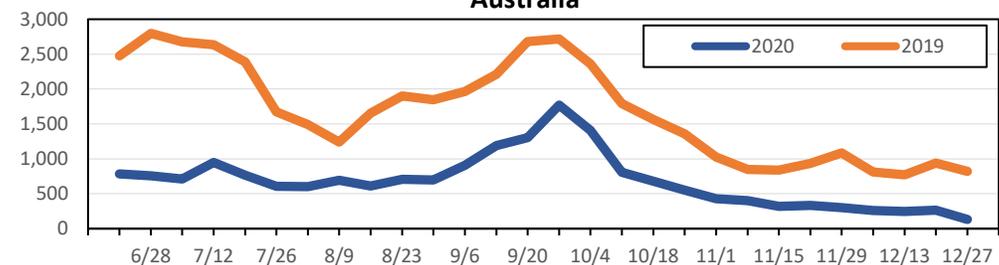
Source: Global Agency Pro, as of June 17, 2020

Travel Agency Bookings for Future Travel to Hawai'i as of June 17, 2020
Canada



Source: Global Agency Pro, as of June 17, 2020

Travel Agency Bookings for Future Travel to Hawai'i as of June 17, 2020
Australia



Source: Global Agency Pro, as of June 17, 2020

YouGov Destination Index Trends

June 22, 2020



YouGov Syndicated Survey

- HTA subscribes to YouGov's BrandIndex and Profiles databases for US, Japan, and Australia
- YouGov has a global consumer panel with over 6 million participants in 42 countries who take over 20 million surveys each year
- 10,000 consumers are surveyed each day
- HTA receives access to new data each week
- YouGov has daily brand tracking metrics – media-focused, brand health, purchase/intent, consumer status

Destination Index

- **Buzz**
 - Net % of people that heard something positive about the brand in past two weeks minus % of people heard something negative about brand in past two weeks
- **Recommend**
 - Net % would recommend to others minus % would tell to avoid
- **Word of Mouth Exposure**
 - Yes% talked with someone about the brand (in-person, online or through social media)
- **Consideration**
 - Yes% would consider purchasing a brand when next in market

U.S. Destination Index Trends

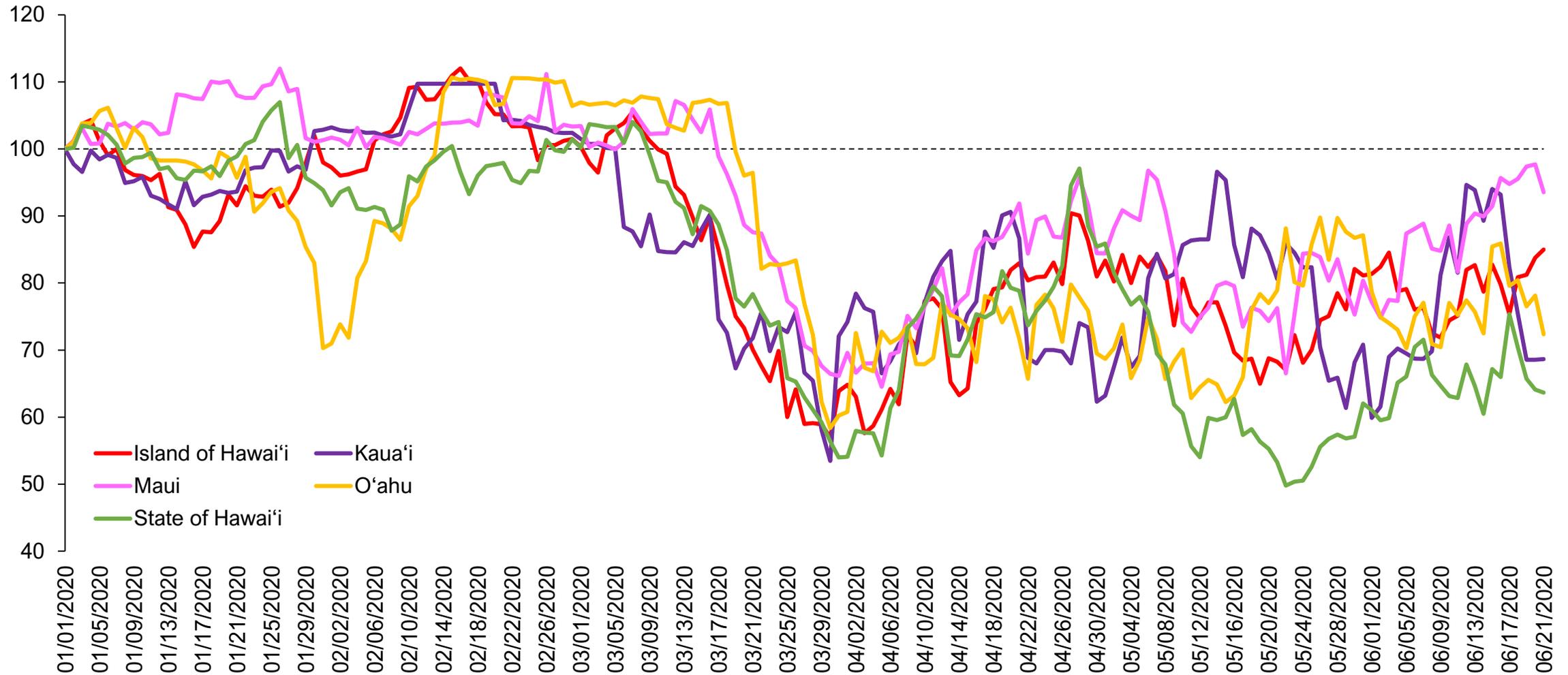


U.S. Buzz Net Score Two-Week Moving Average



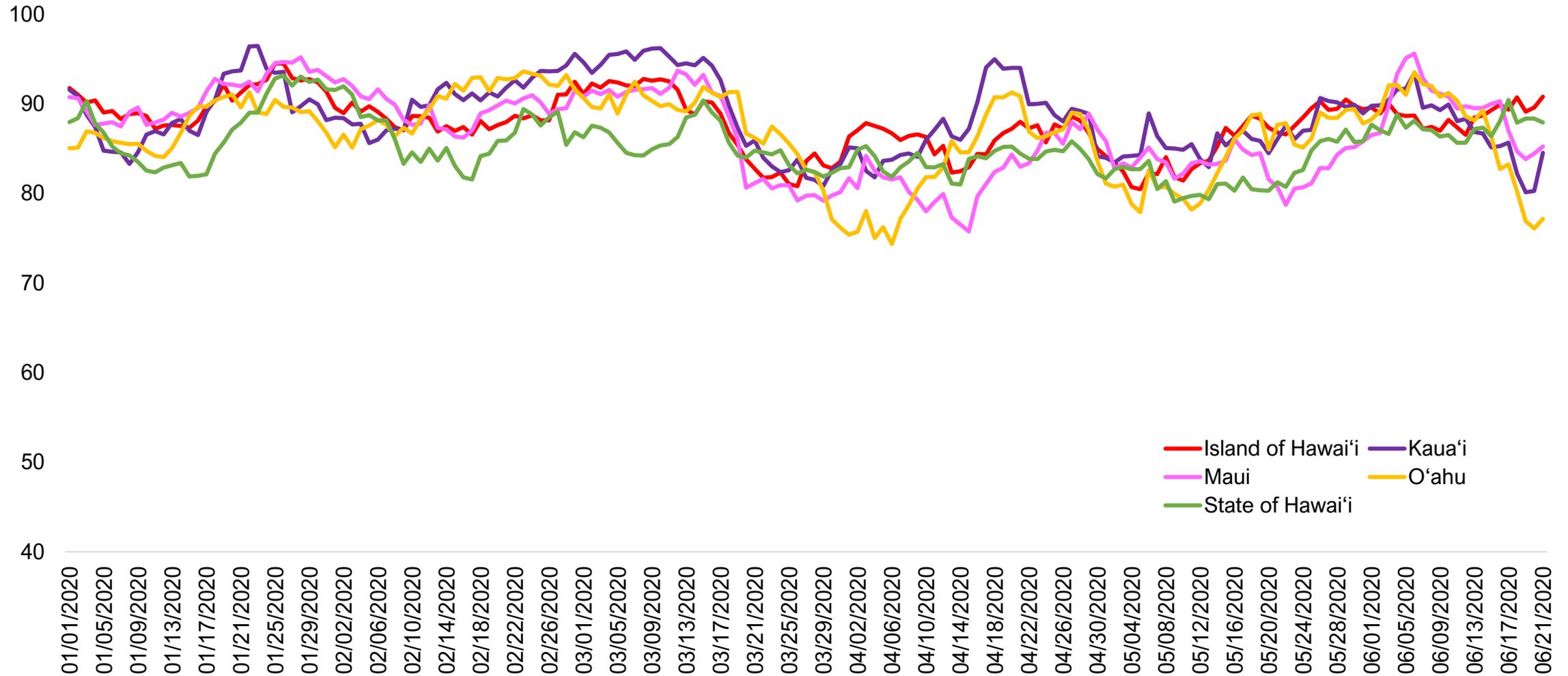
Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

Index of U.S. Buzz Net Score Two-Week Moving Average



Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

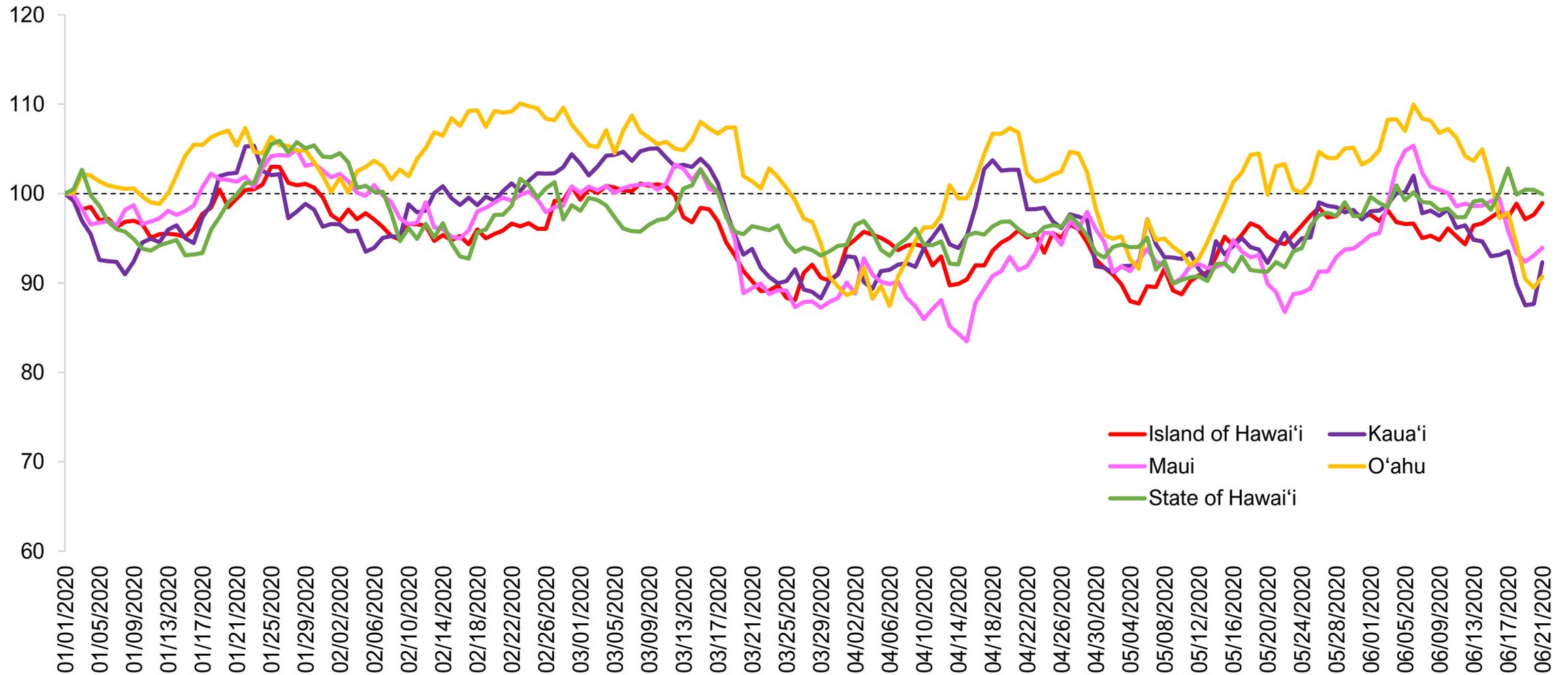
U.S. Recommend Net Score Two-Week Moving Average



Question: (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID?

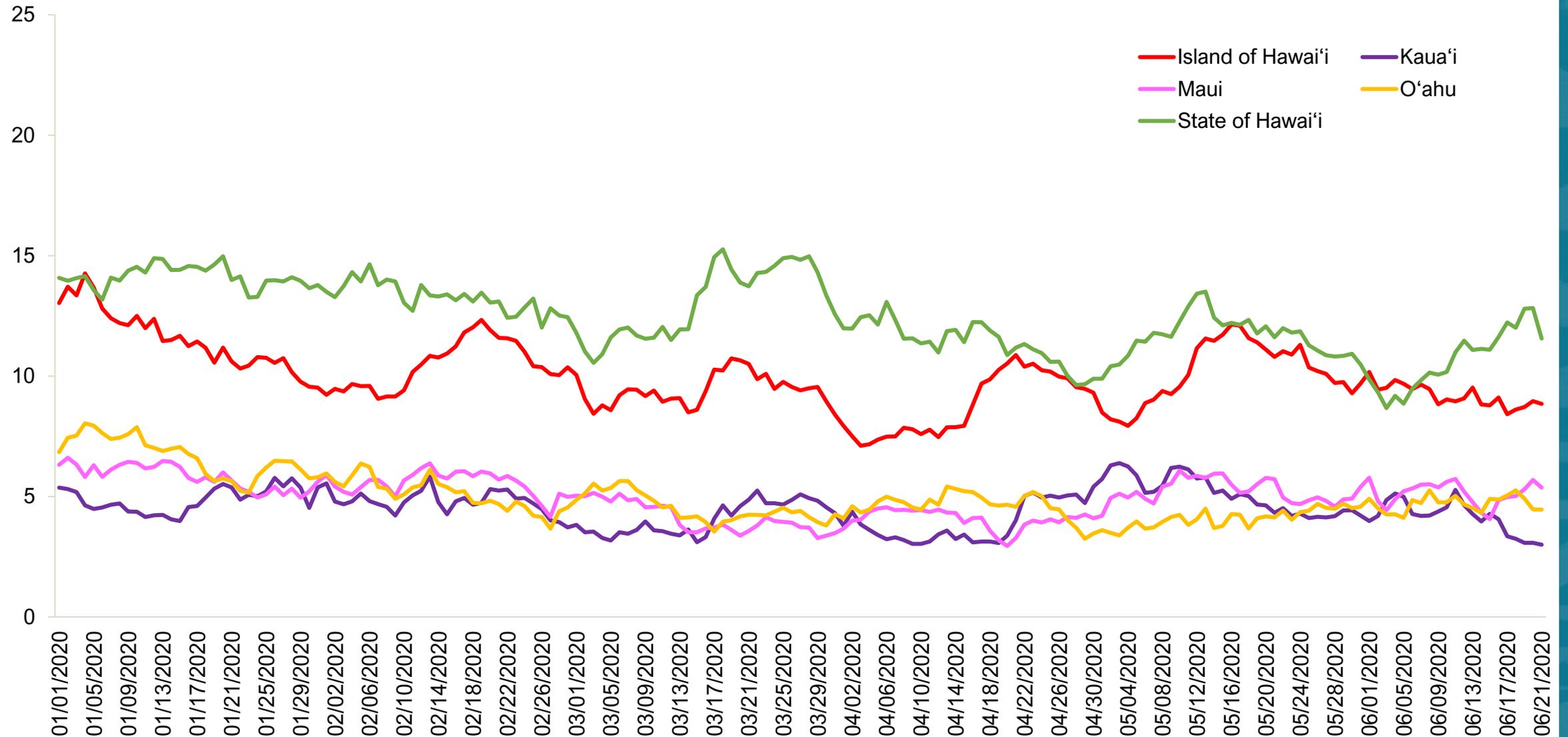
Source: YouGov data as of June 21, 2020

Index of U.S. Recommend Net Score Two-Week Moving Average



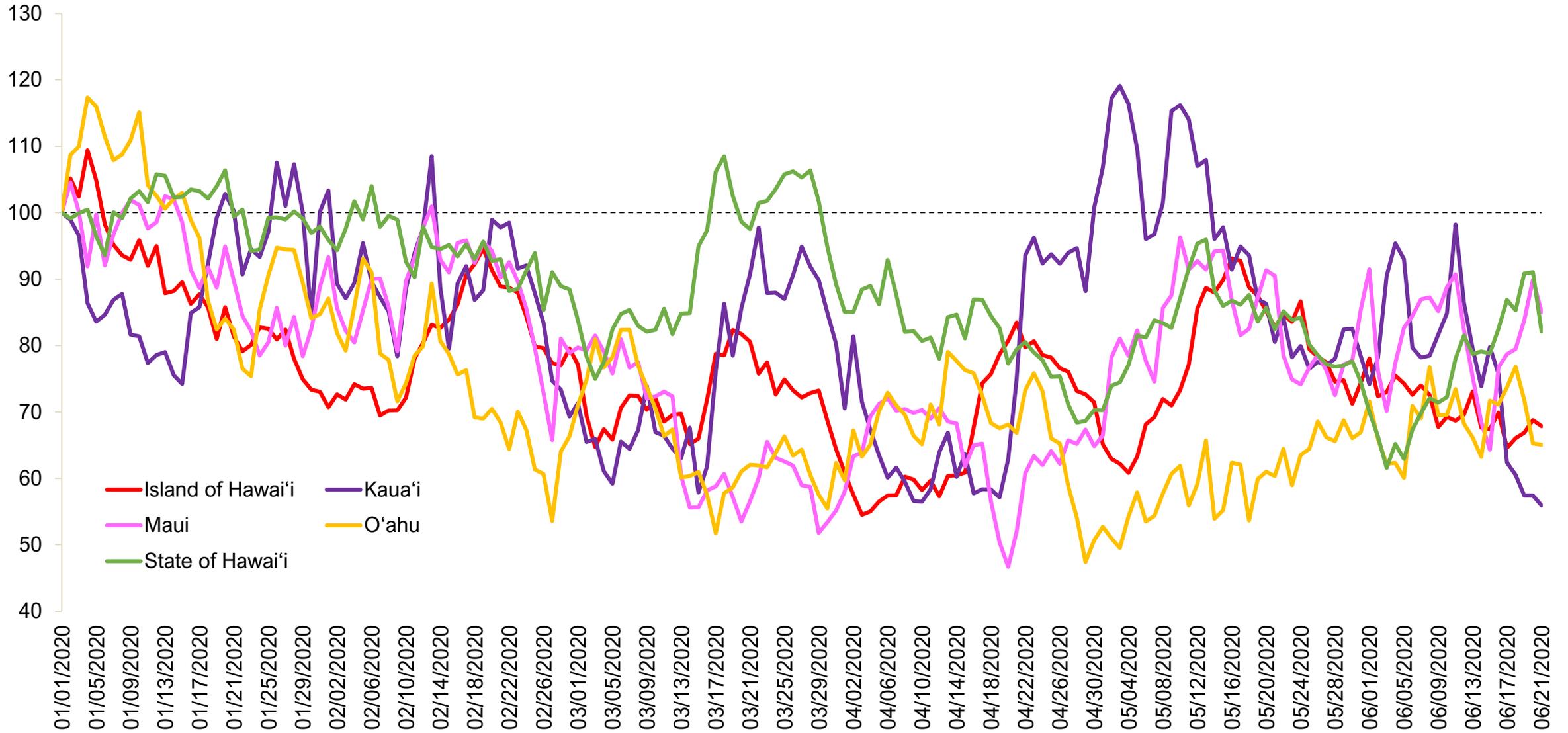
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U.S. Word of Mouth Exposure (% Yes) Two-Week Moving Average



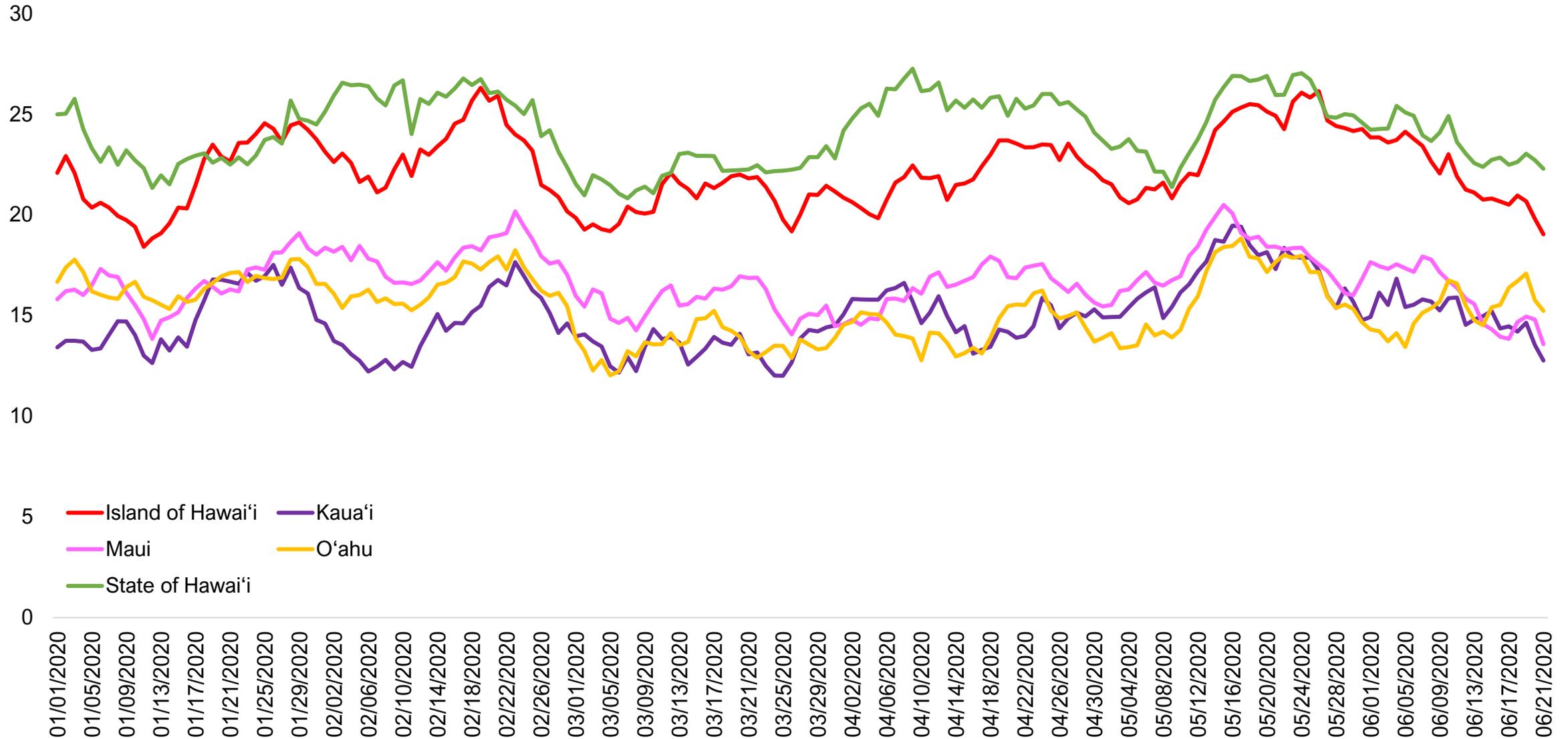
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Index of U.S. Word of Mouth Exposure (% Yes) Two-Week Moving Average



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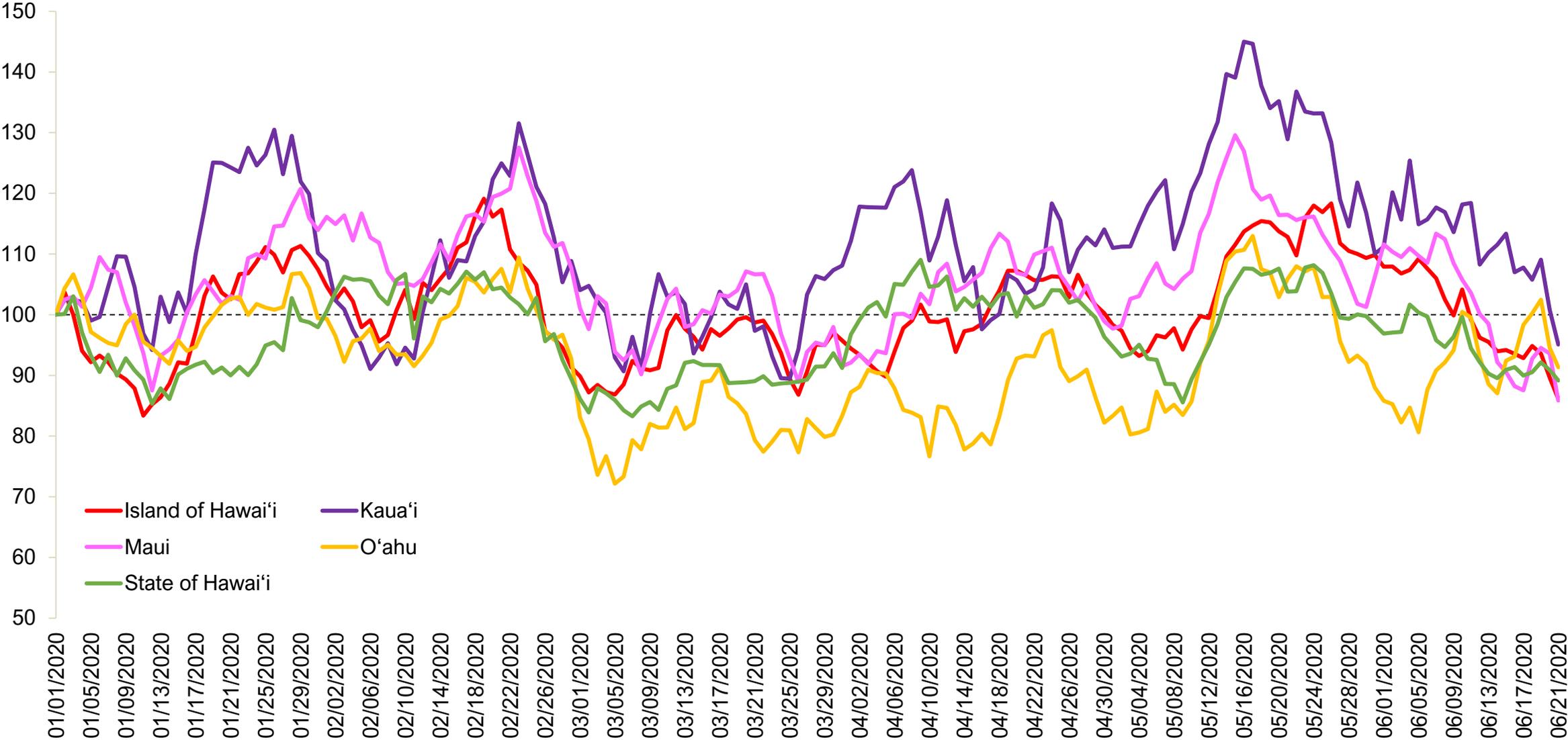
U.S. Consideration (% Yes) Two-Week Moving Average



Question: (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?

Source: YouGov data as of June 21, 2020

Index of U.S. Consideration (% Yes) Two-Week Moving Average

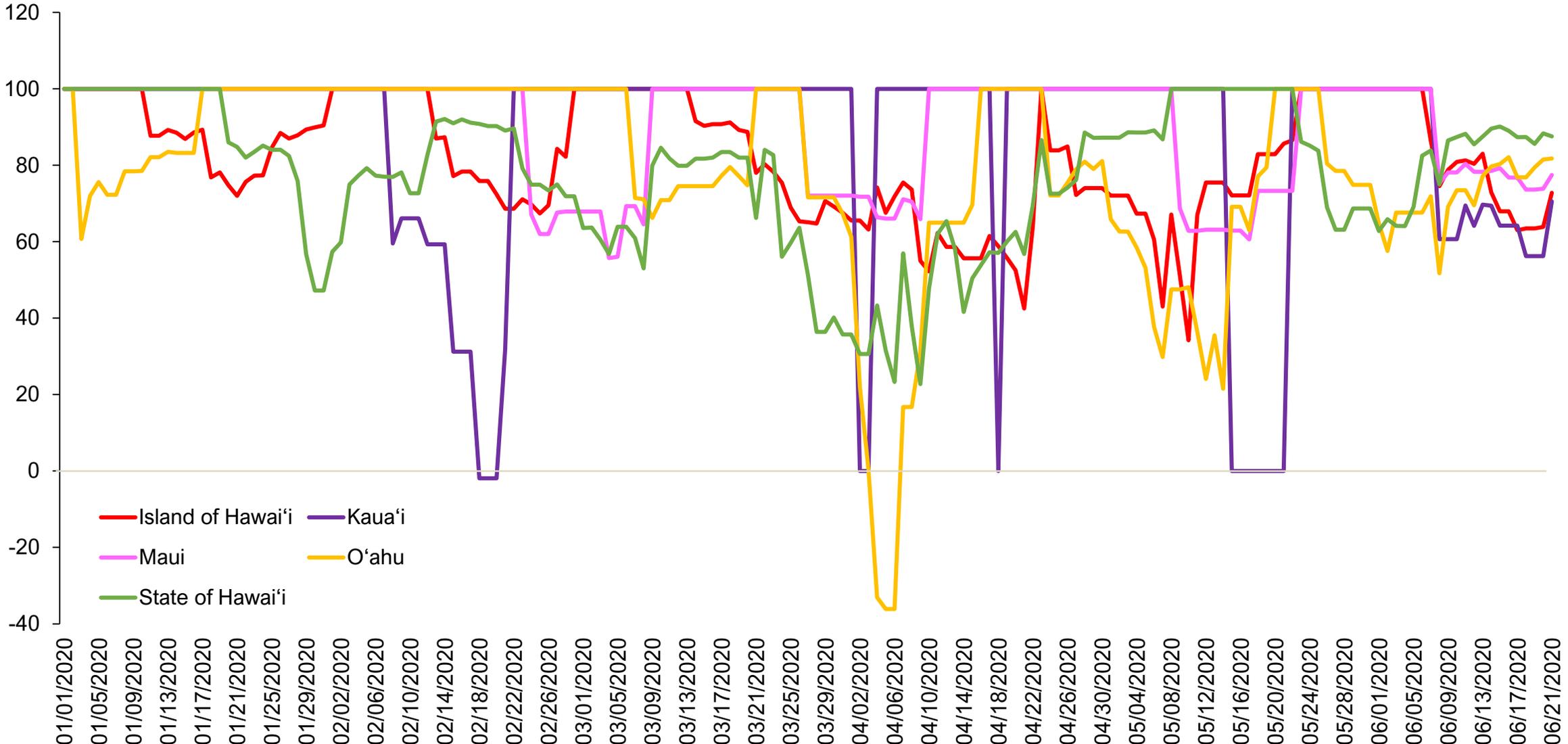


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Japan Destination Index Trends

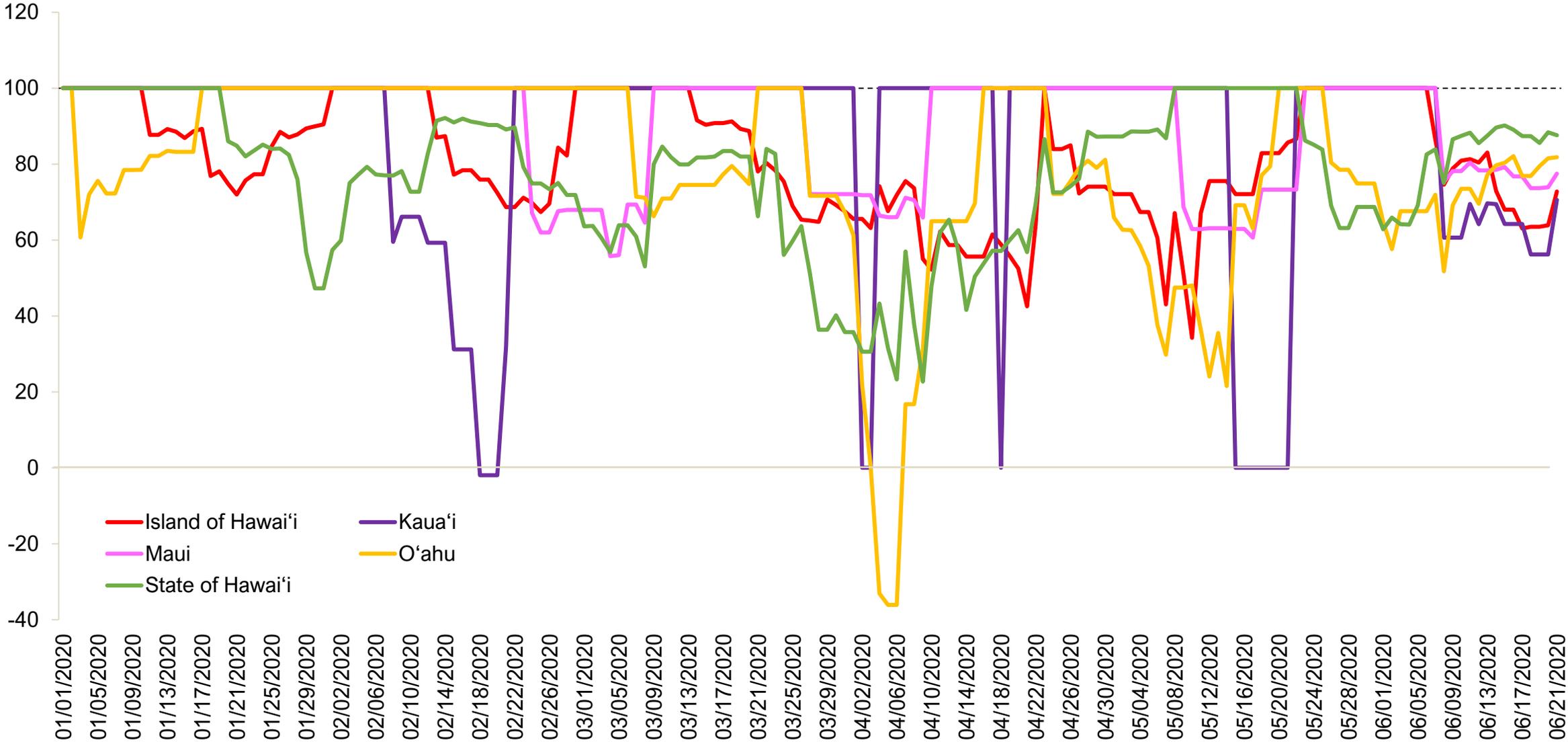


Japan Buzz Net Score Two-Week Moving Average



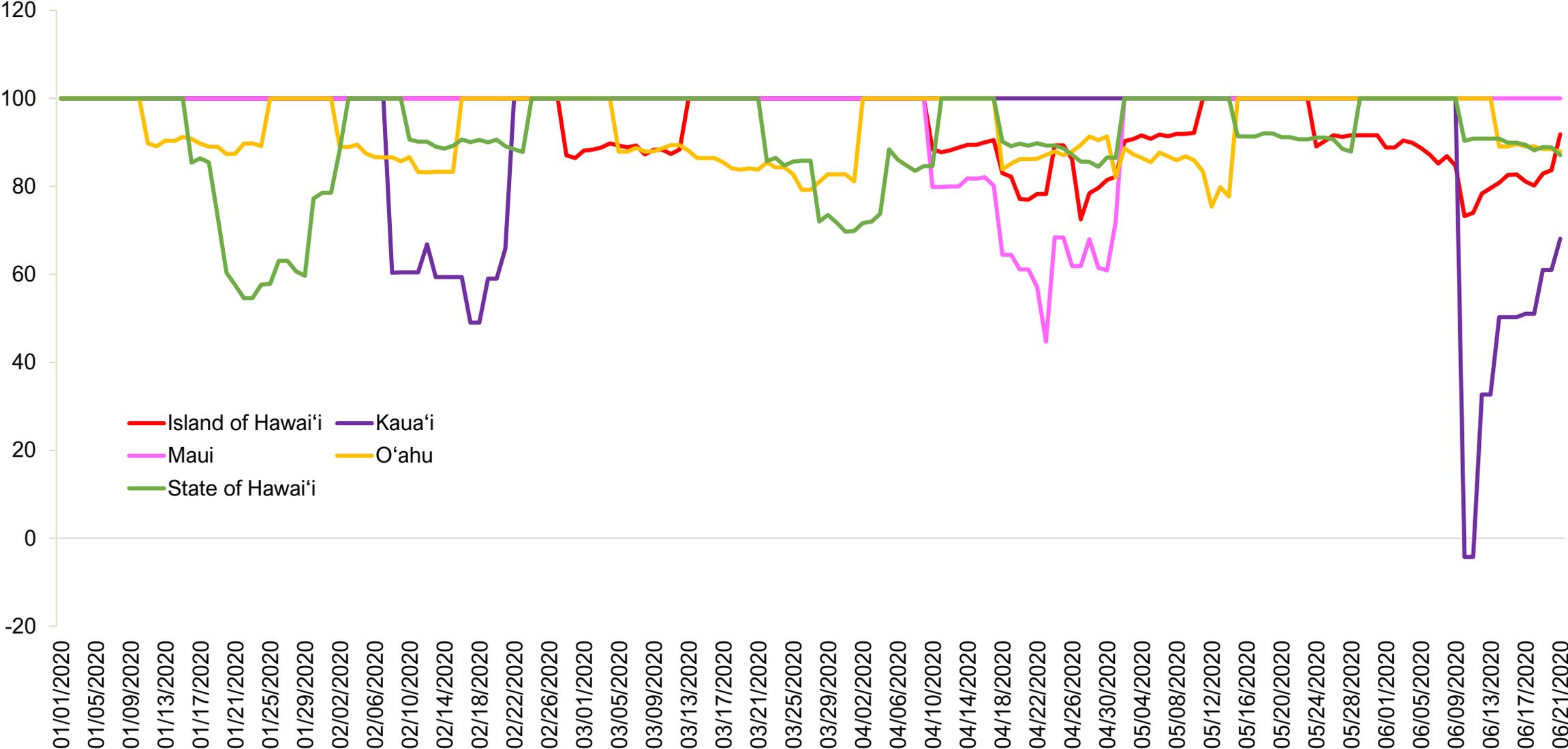
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Index of Japan Buzz Net Score Two-Week Moving Average



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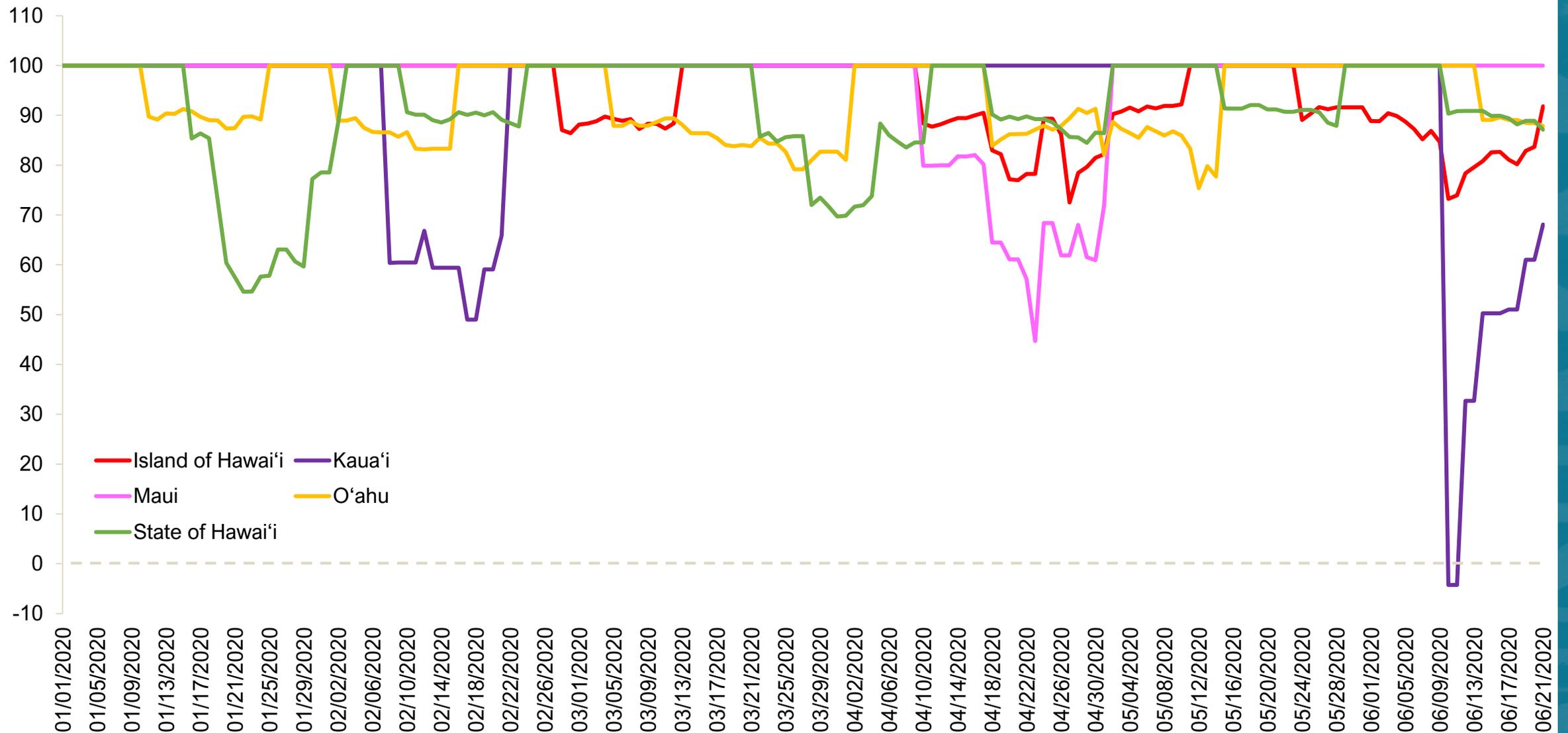
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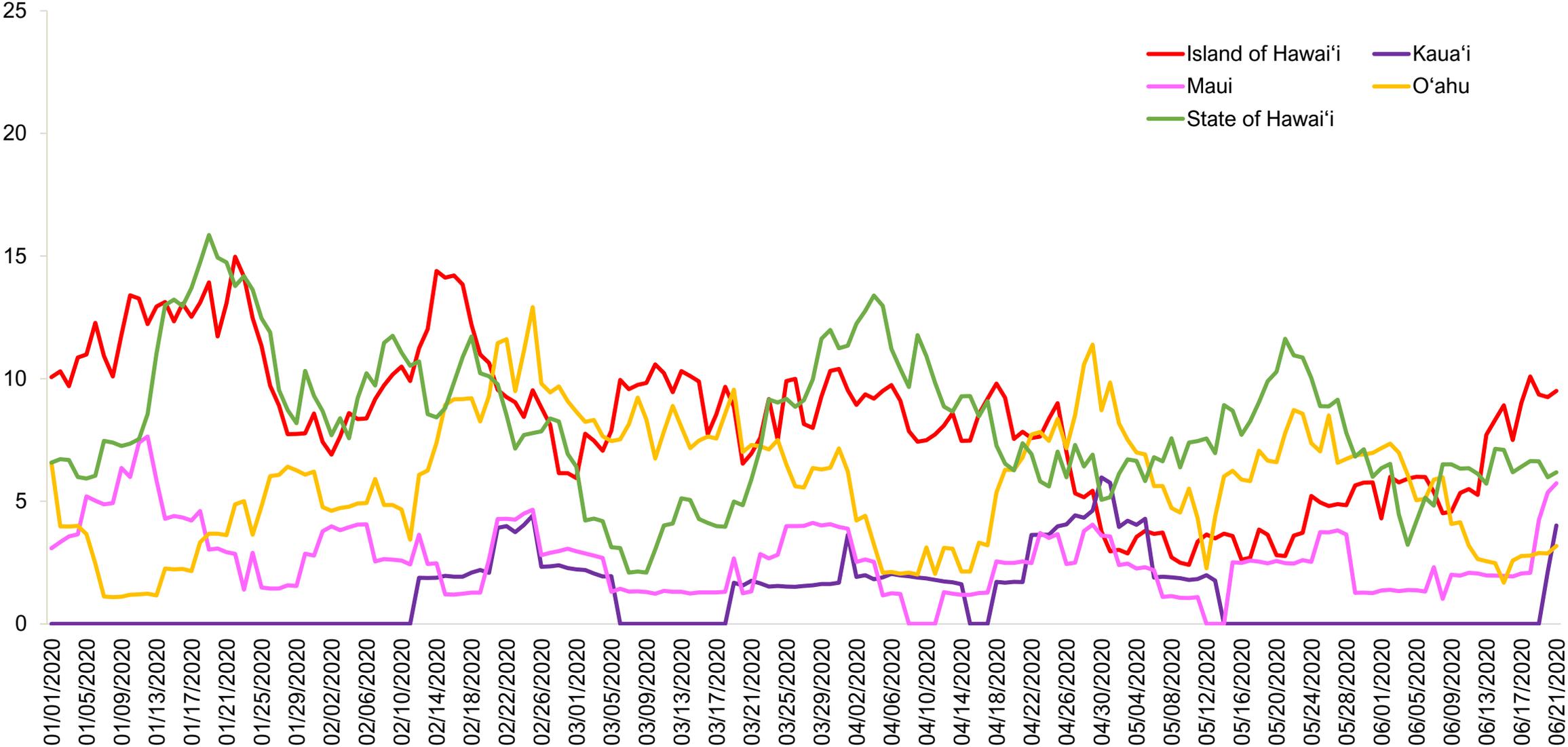
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Index of Japan Recommend Net Score Two-Week Moving Average



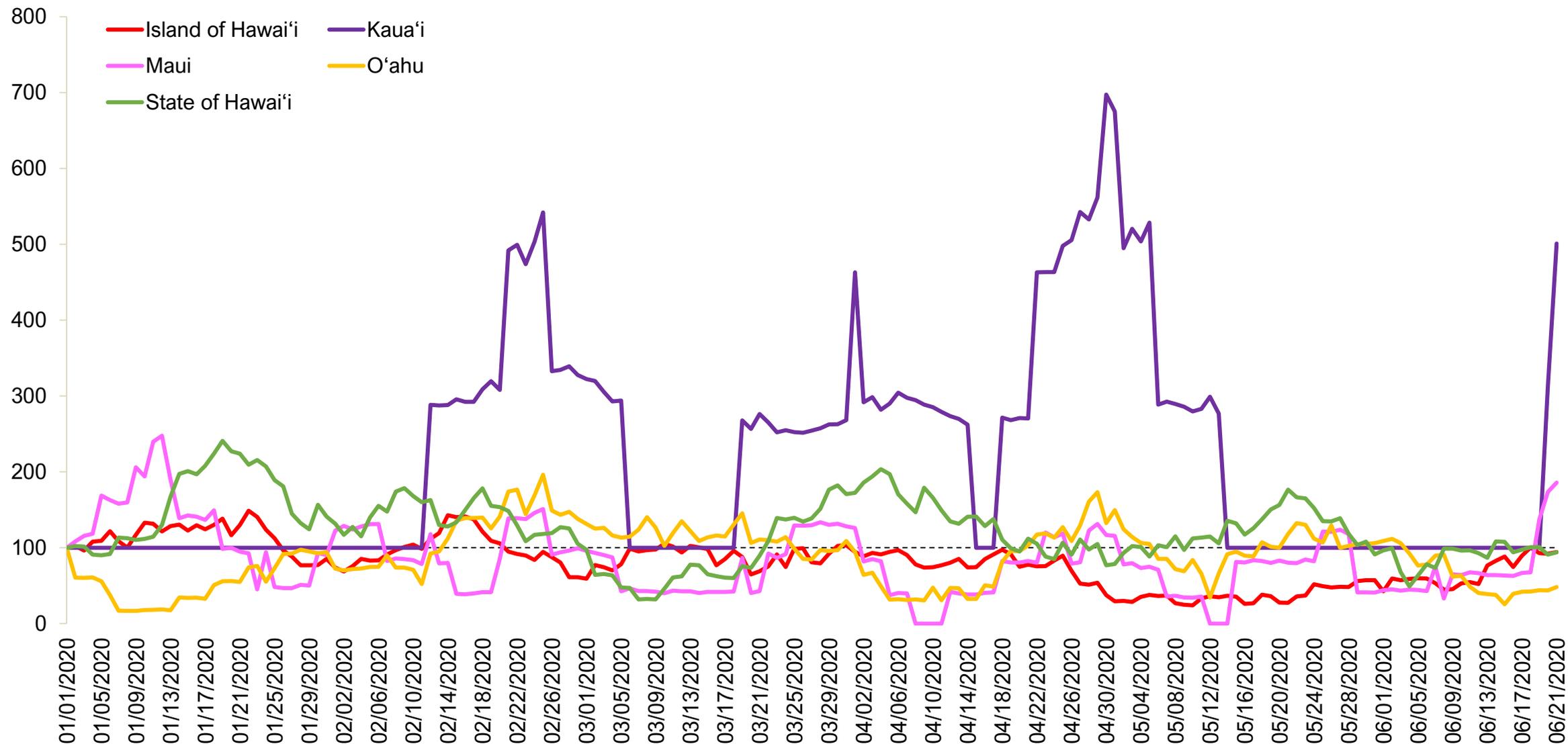
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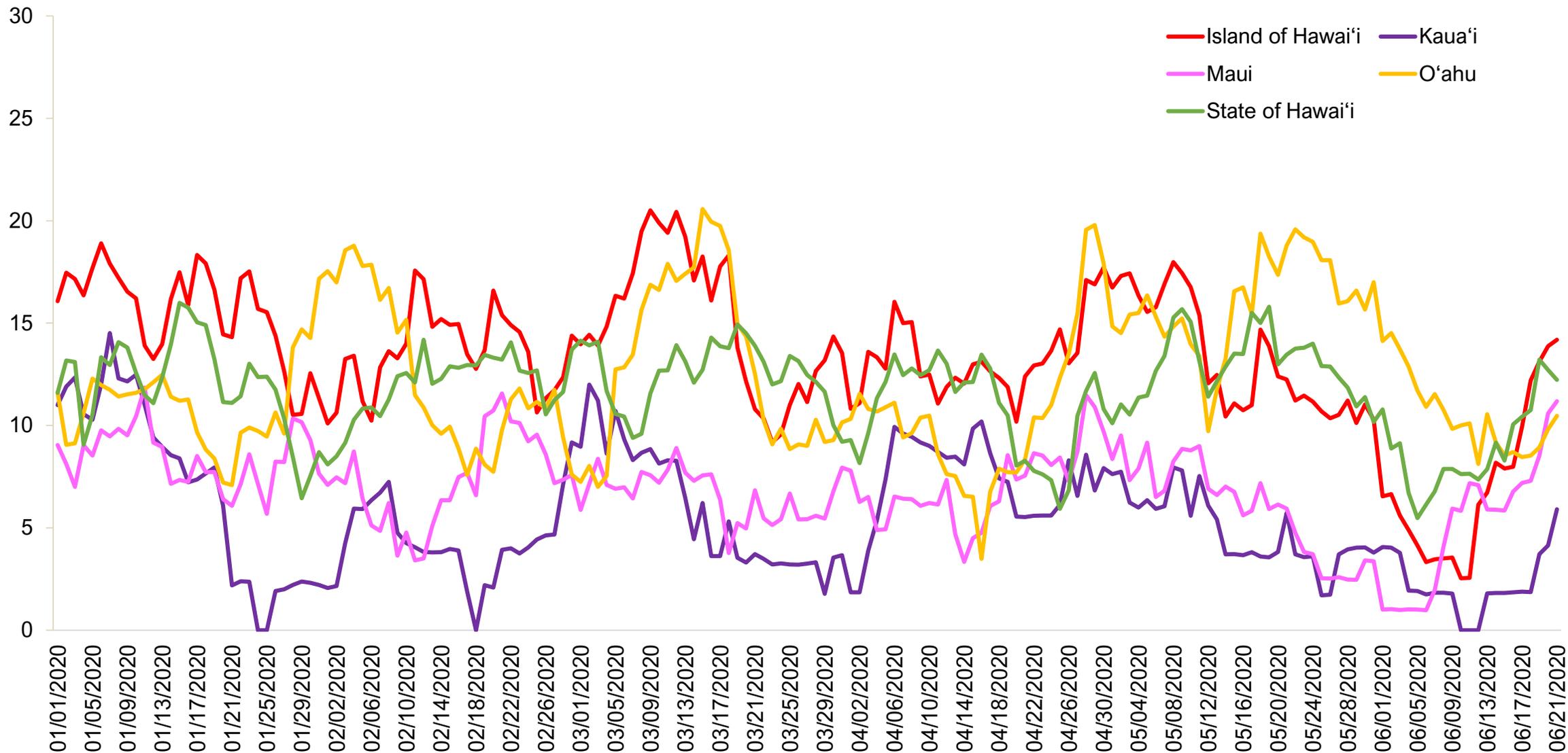
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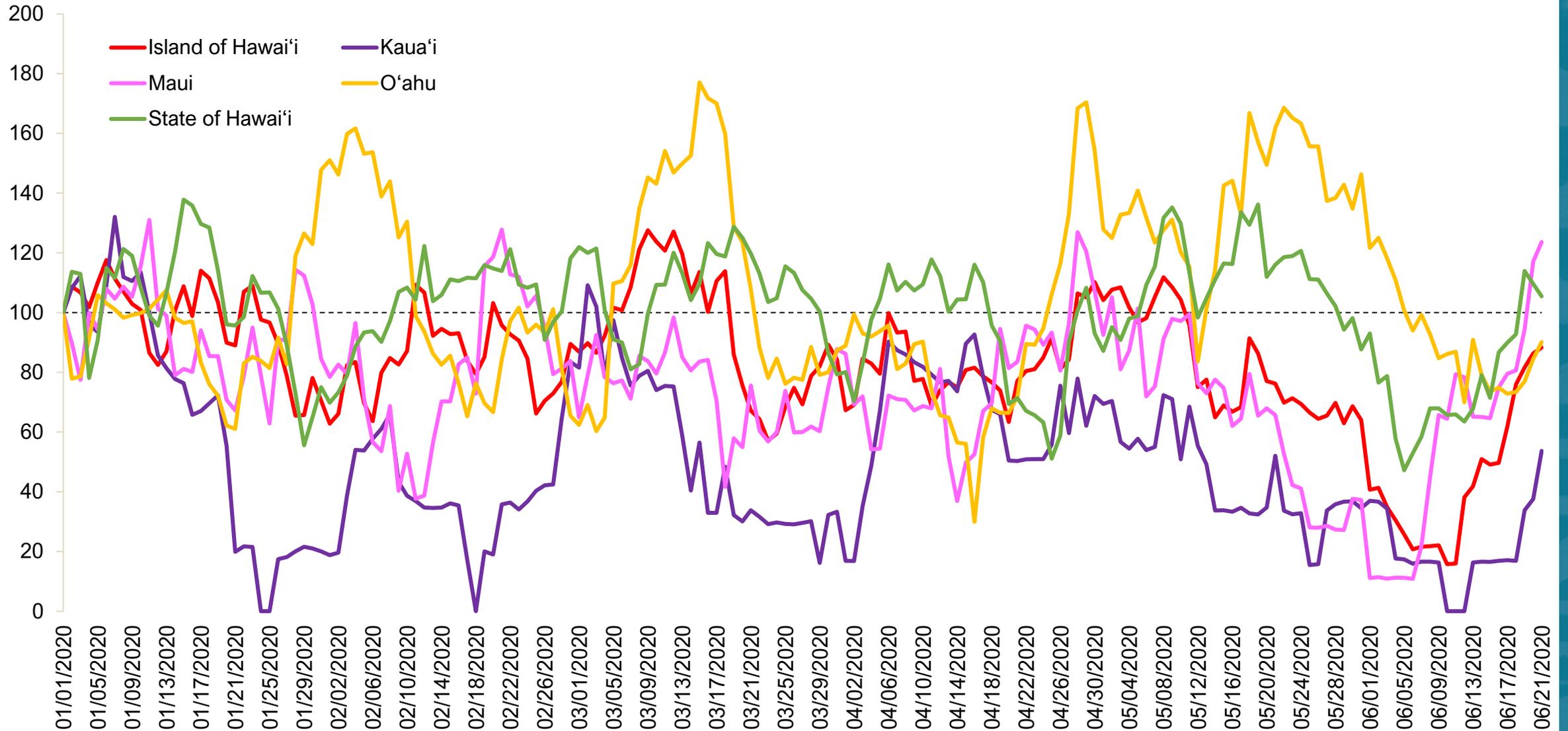
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Japan Consideration (% Yes) Two-Week Moving Average



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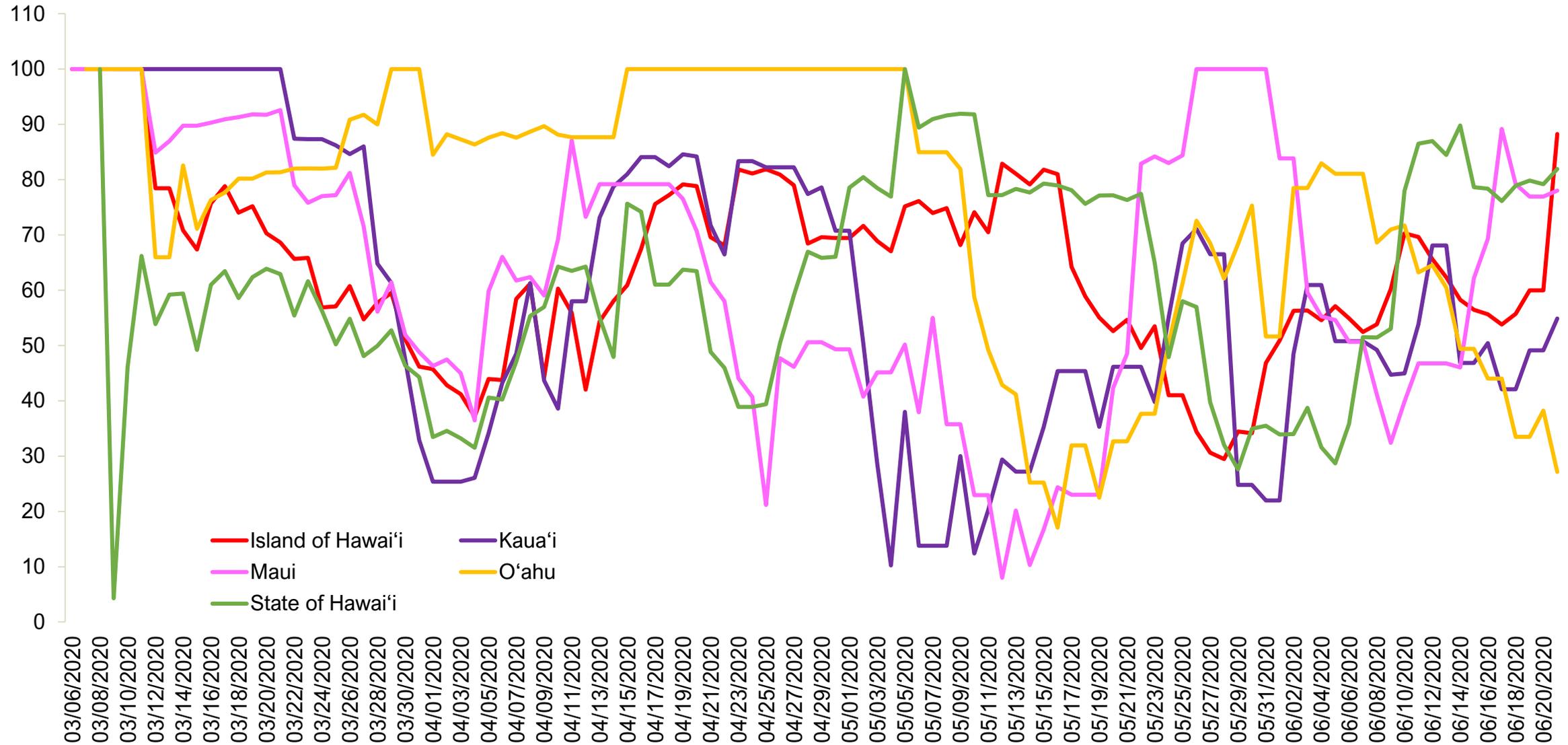


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Australia Destination Index Trends

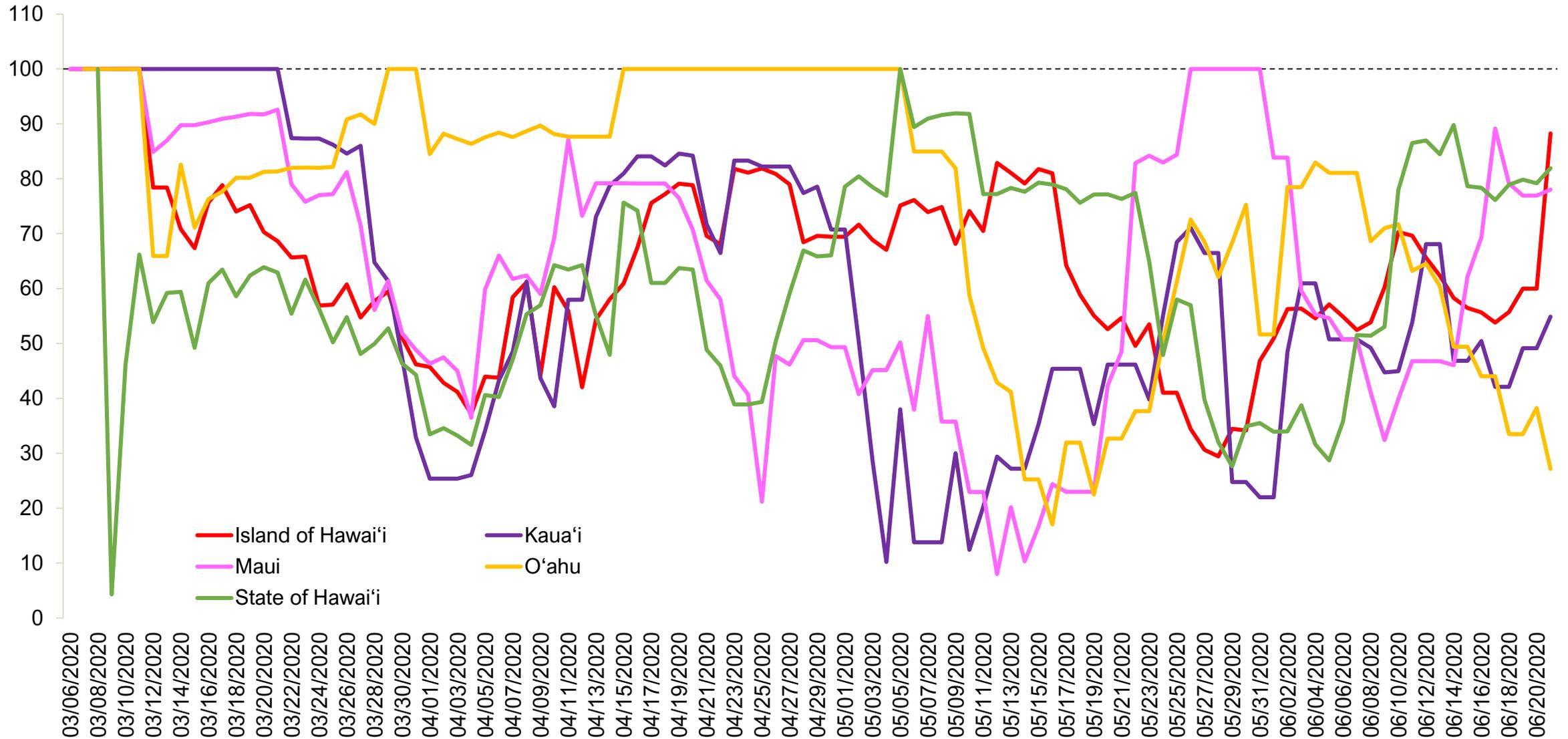


Australia Buzz Net Score Two-Week Moving Average



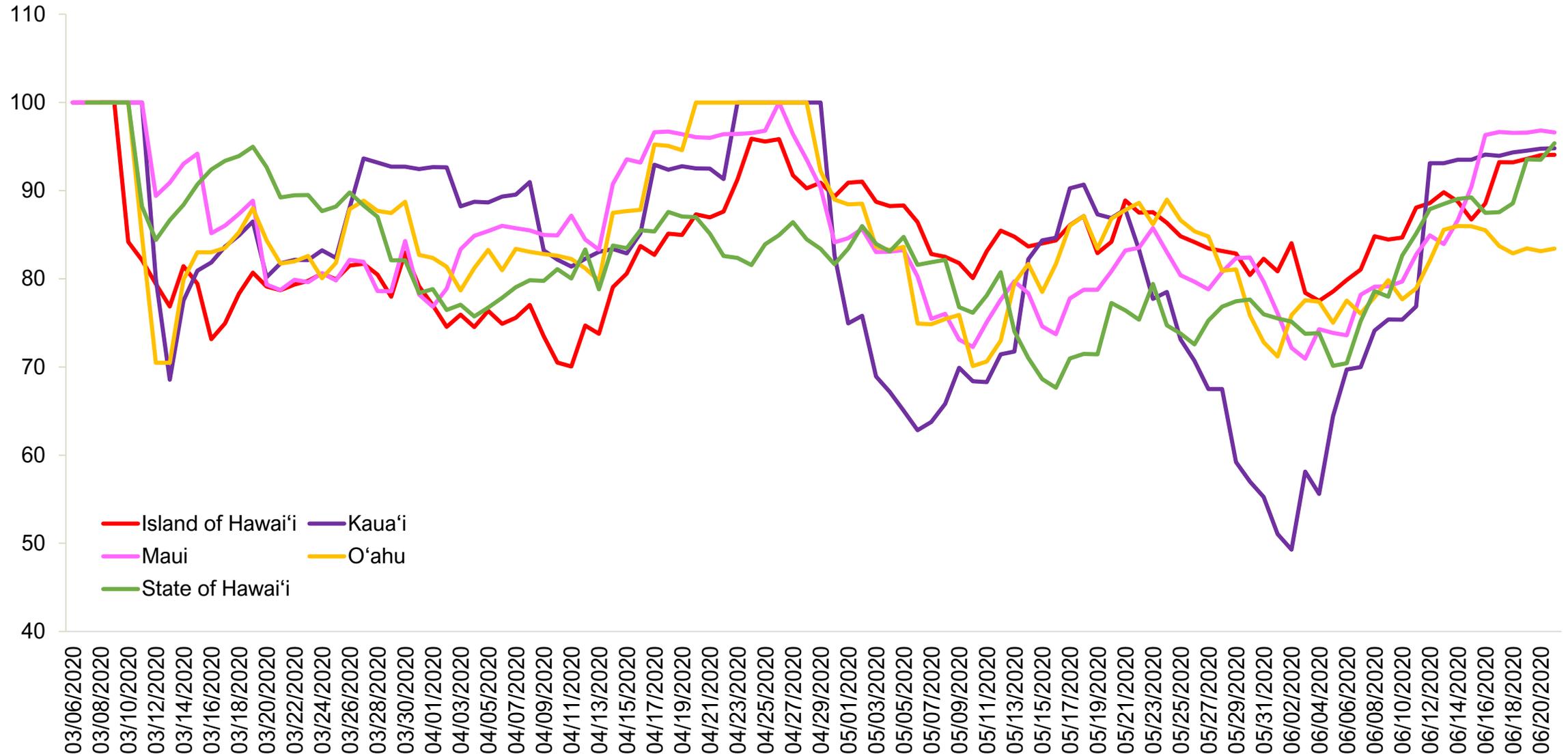
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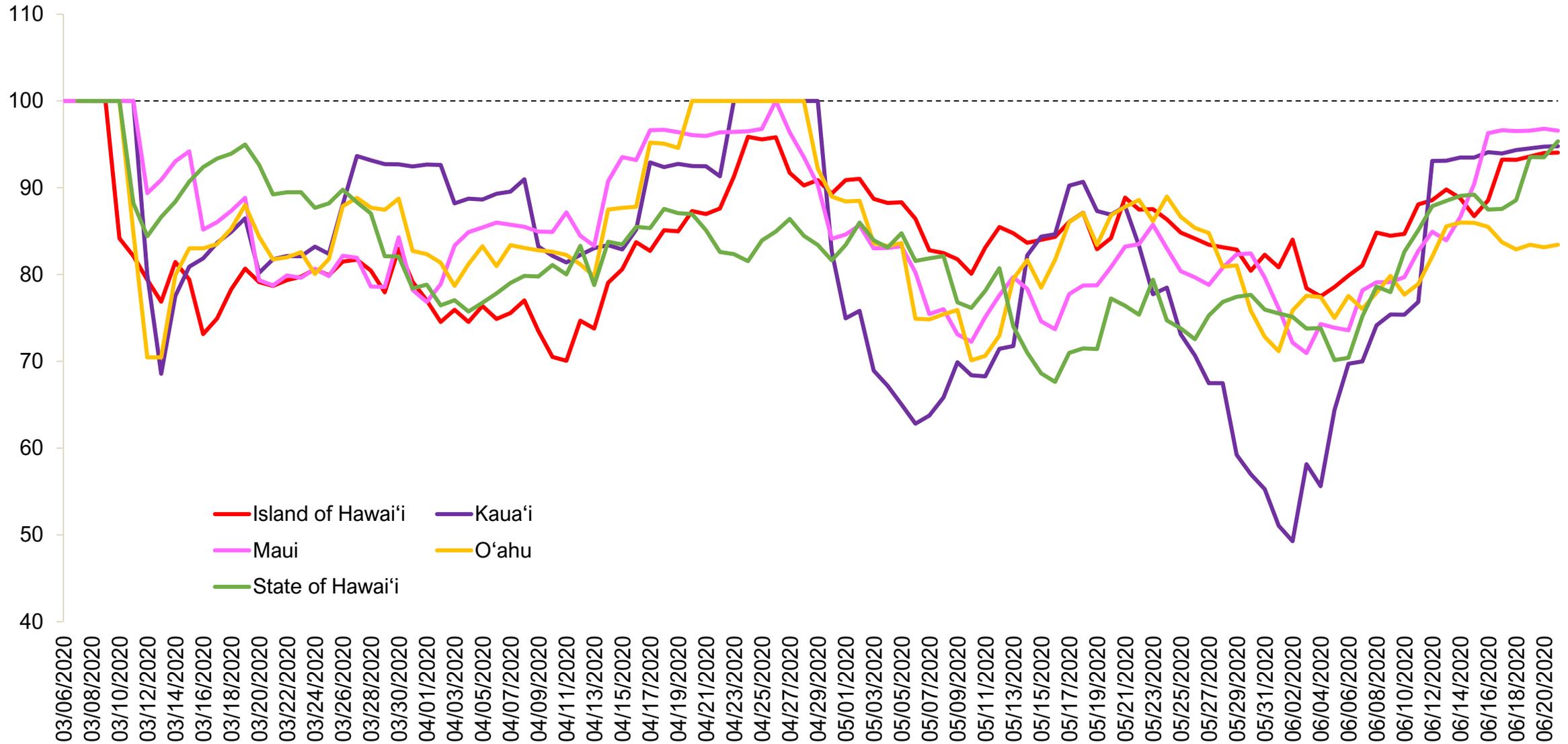
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Australia Recommend Net Score Two-Week Moving Average



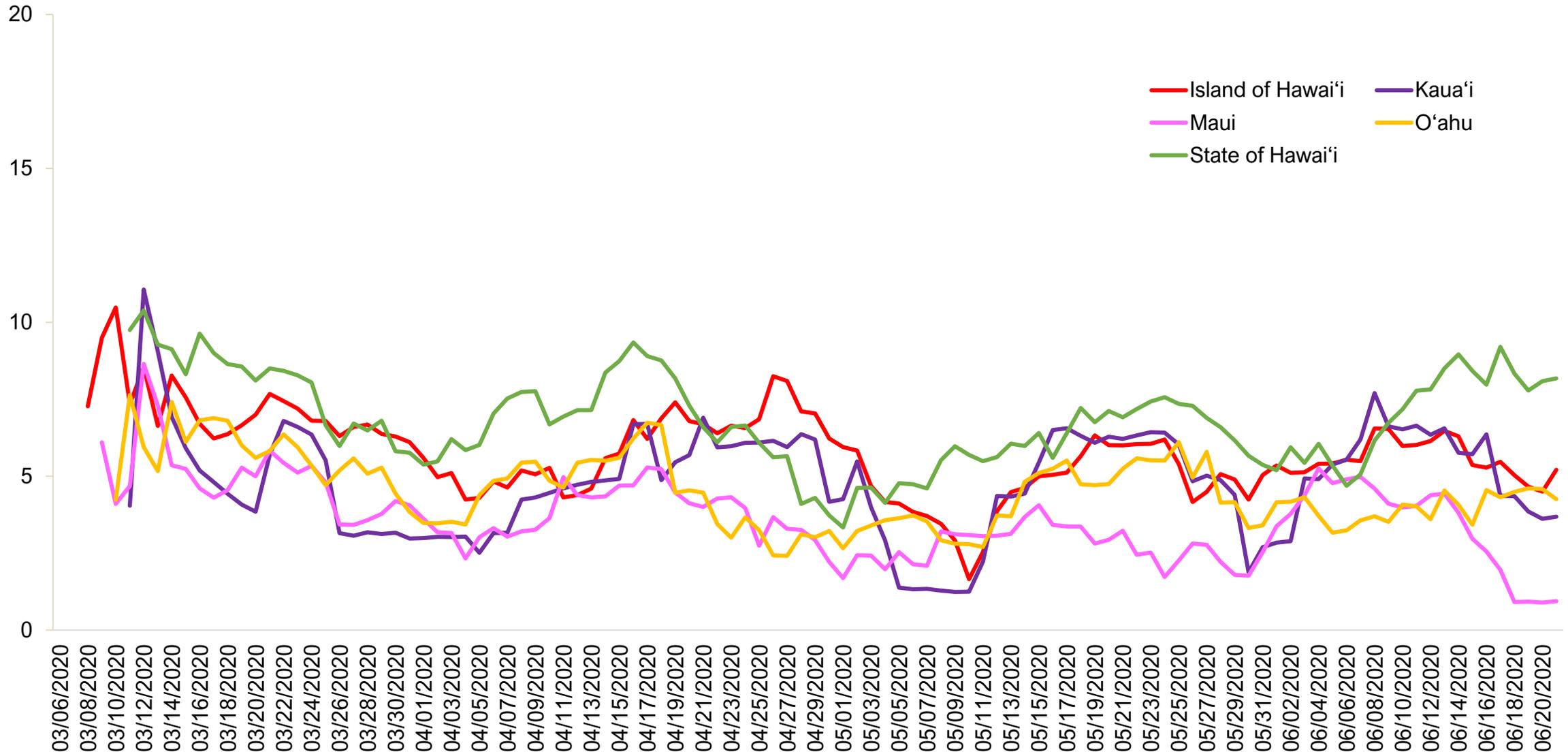
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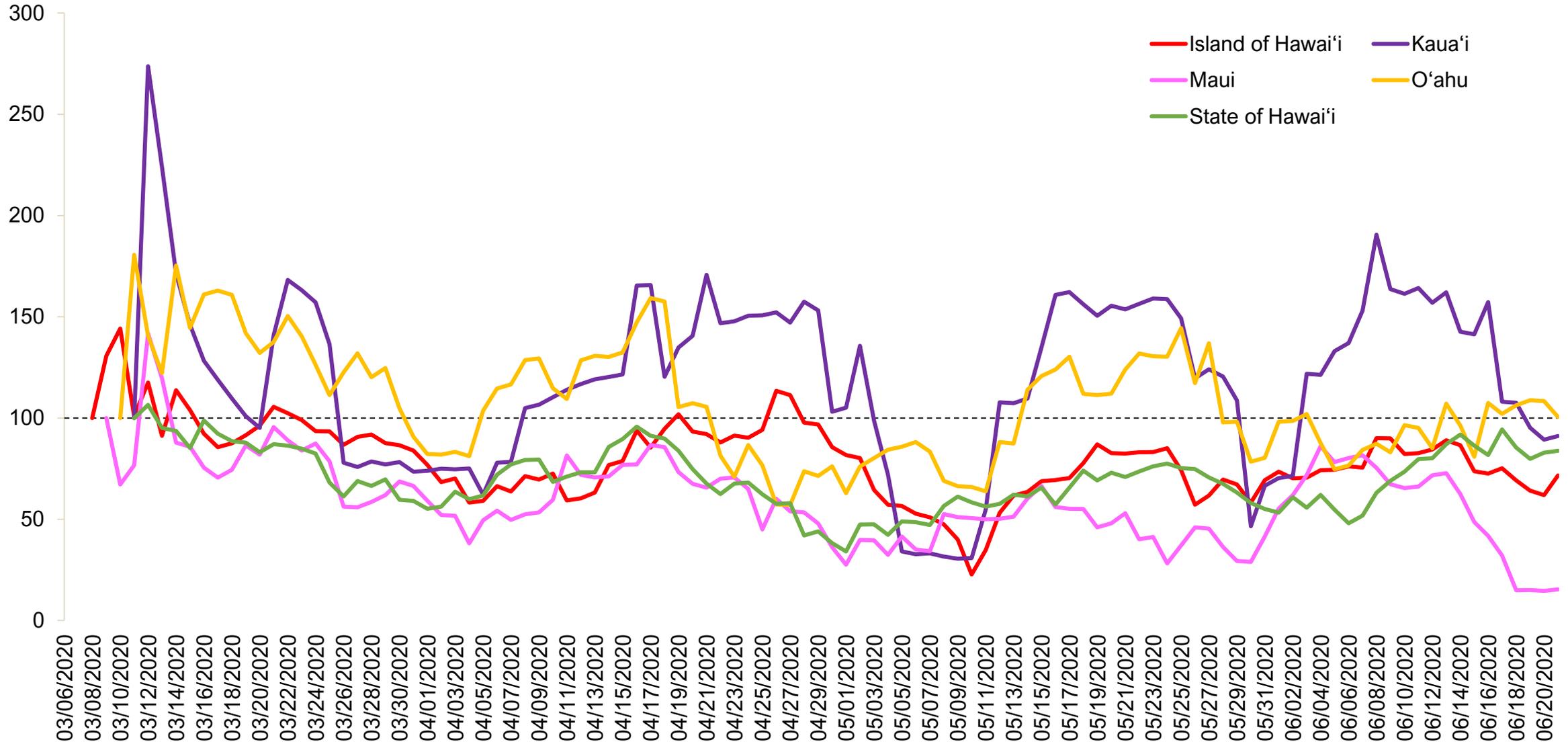
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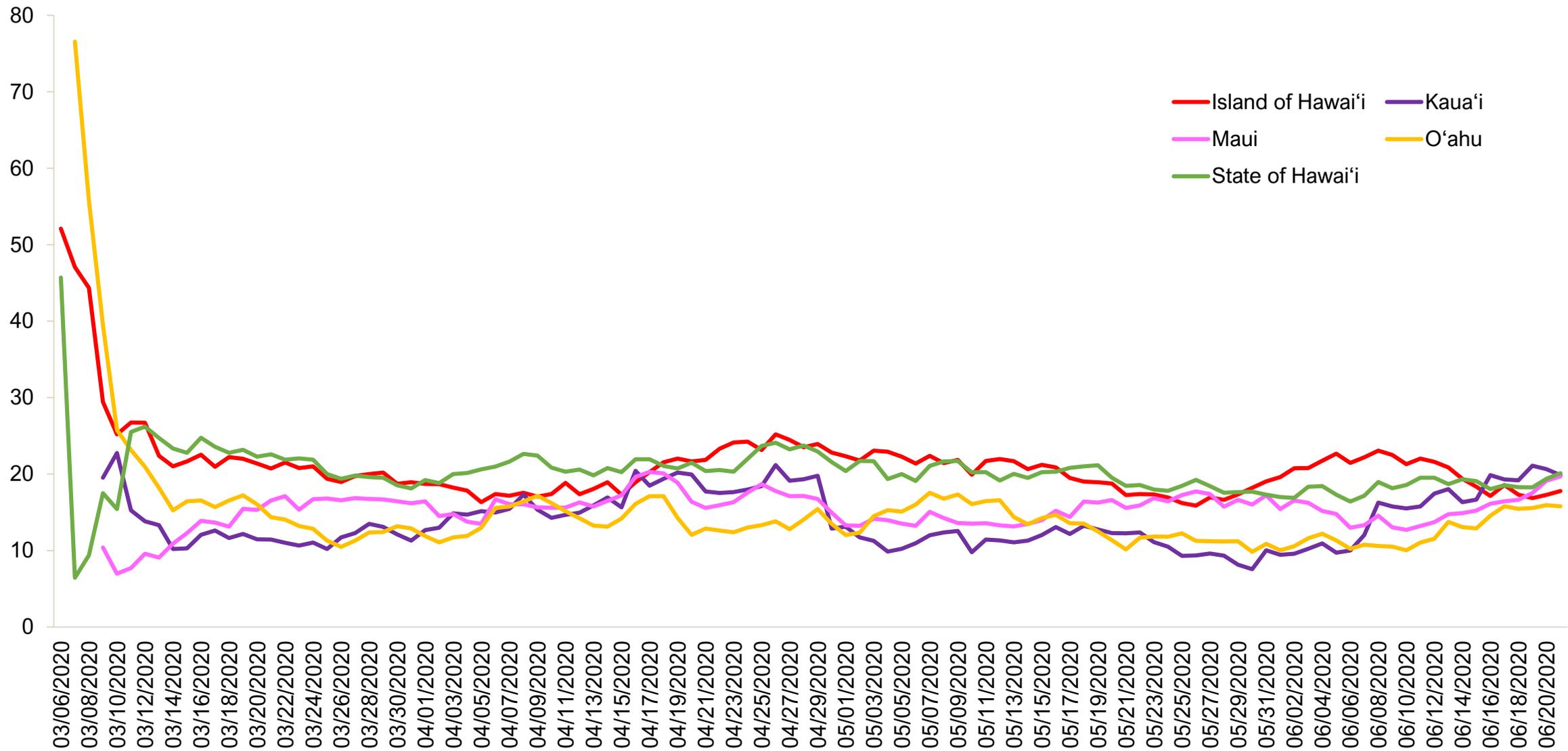
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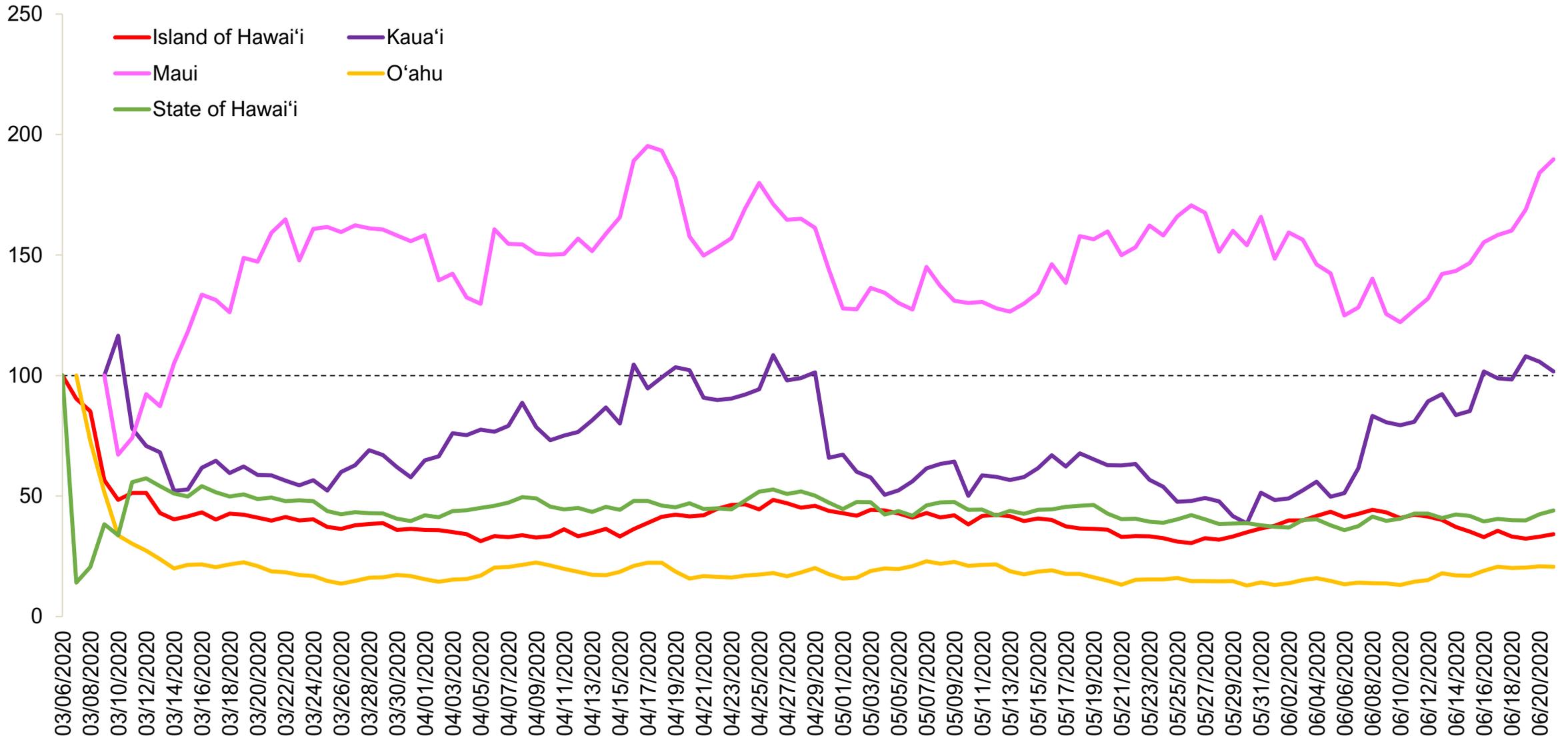
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Australia Consideration (% Yes) Two-Week Moving Average



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Index of Australia Consideration (% Yes) Two-Week Moving Average



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8

Discussion and Approval of the Fiscal Year 2021 Budget for the Hawaii Tourism Authority

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.

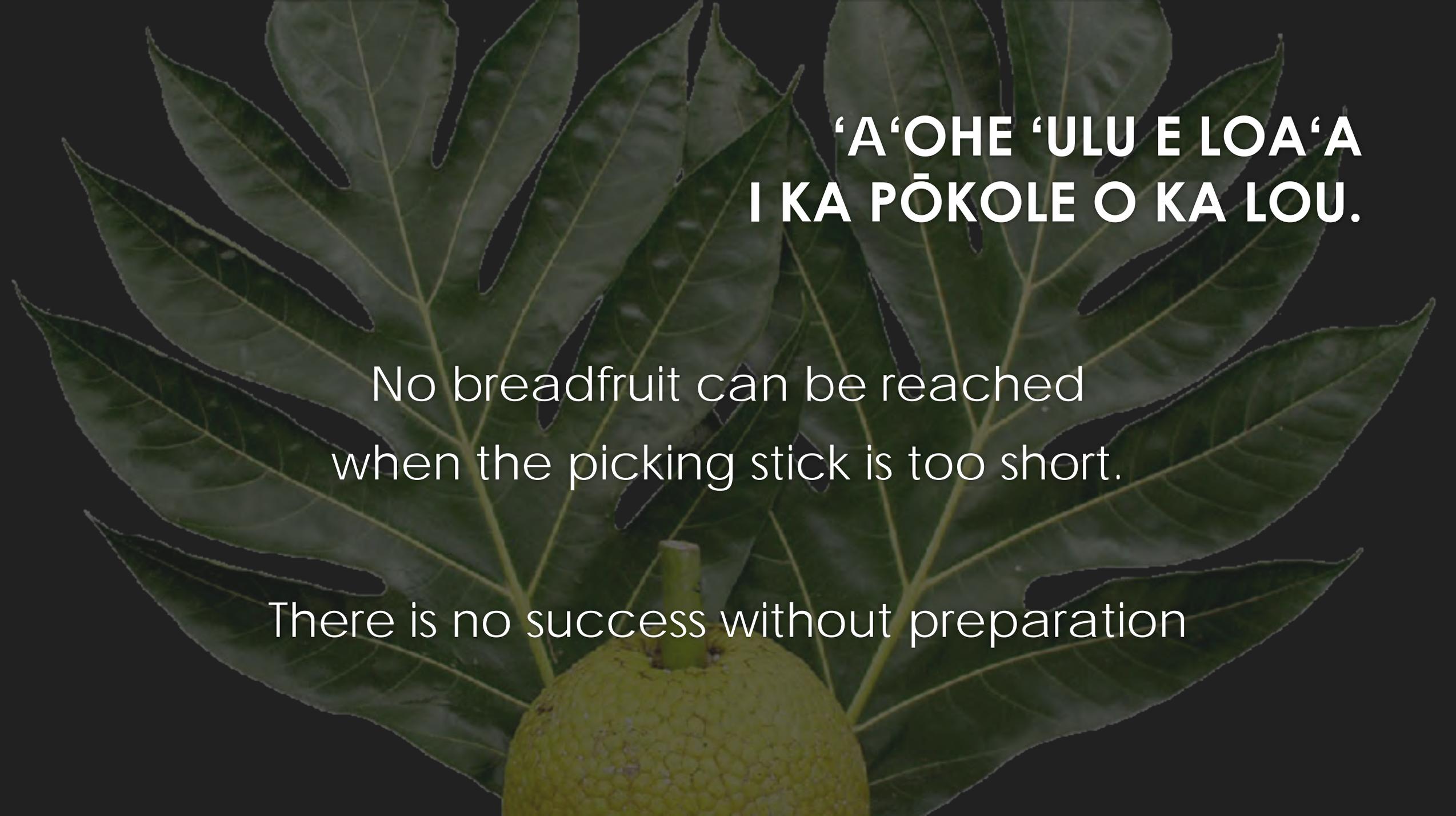


Kūkulu Ola & Aloha ‘Āina 2021

Kalani L. Ka‘anā‘anā

Director of Hawaiian Cultural Affairs & Natural Resources

June 25, 2020



**‘A‘OHE ‘ULU E LOA‘A
I KA PŌKOLE O KA LOU.**

No breadfruit can be reached
when the picking stick is too short.

There is no success without preparation

Budget Allocation Overview

Hawaiian Culture	
Kūkulu Ola	\$3,059,781
Hawaiian Culture Initiative	\$950,000
Ma‘ema‘e Training	\$15,000
Market Support	\$20,000
AIANTA Membership	\$300
Salaries (4 staff)	\$217,140
Subtotal:	\$4,262,221

Natural Resources	
Aloha ‘Āina	\$2,376,276
Visitor Impact Program	\$205,667
Salaries	\$77,459
Subtotal:	\$2,659,402

Combined Total
\$6,921,623

A person is kneeling on dark, rich soil, viewed from behind. They are wearing a yellow dress with a black floral pattern and a black net-like overlay. Their hands are raised in a prayerful gesture. The background is a dark, misty or smoky atmosphere.

Ka Mo'omeheu Hawai'i Hawaiian Culture

Ho'oulu (grow) the uniqueness and integrity of the Native Hawaiian culture and community, and their significance in differentiating the destination, through genuine experiences for both visitors and residents.

Guiding Principles

- Strengthen the relationship between the visitor industry and the Hawaiian community.
- Strive to nurture the Hawaiian culture by creating visitor experiences, activities, and marketing programs that are respectful and accurate.
- Support Hawaiian programs and cultural practitioners, craftsmen, musicians, linguists, and other artists to help preserve and perpetuate Hawaiian culture

Strategic Choices

- 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 of the HTA with other Native Hawaiian-serving organizations in alignment with our goals and objectives.

A woman with dark hair is looking down at a laptop screen. The background shows some green plants and a wooden railing.

Kūkulu Ola 2021

- Provide \$3,059,781 to fund projects that occur in Calendar year 2021
- HTA will issue a statewide RFP in Q3 2020. The evaluation committee will be by island to move decision making closer to community in alignment with our strategic planning.
- Projects selected will be community-based programs and projects that enhance, strengthen, and perpetuate the Hawaiian culture and community.



Examples of Past Projects

- Educational programs
- Hawaiian language-oriented
- Support for Native Hawaiian art, artisans & music
- Archiving/restoration of cultural footage and documents
- Hawaiian place names signage
- Community economic development
- Perpetuation of cultural practices
 - Wa'a
 - Lei
 - Hale building
 - Kapa





Hawaiian Cultural Initiative

NATIVE HAWAIIAN HOSPITALITY ASSOCIATION



- Provides \$500,000 in support of NaHHA's mission driven work as the lead organization for the Hawaiian Culture Initiative
- In Market support for training and cultural practitioners
- No cost Hawaiian culture training for industry partners.
- Entrepreneurial Development for Hawaiian culture programs that want to create tourism product.

KE KUMU HAWAII

HE PEPA HOHIKIHIKI, PUNA MAU E PONO AI KO HAWAII NUI.

"O ka mea ika ika e paipai ai i ka ika ika, a ka mea ika ika e paipai ai i ka ika ika."

Page 1.

HONOLULU, OAHU, NOV. 26, 1831.



ma hana, ka mea ika ika i ka ika ika, a ka mea ika ika e paipai ai i ka ika ika.

Aka i hana ika ika e ike i ka ika i ka ika ika, a ka mea ika ika e paipai ai i ka ika ika. Ka hana o ka ika ika i ka ika ika. Ua ma ika ika e ika i ka ika ika, a ka mea ika ika e paipai ai i ka ika ika.

O ka ika ika i ka ika ika, a ka mea ika ika e paipai ai i ka ika ika. Ua ma ika ika e ika i ka ika ika, a ka mea ika ika e paipai ai i ka ika ika.

HE KA IKA IKA

ka ika ika e paipai ai i ka ika ika, a ka mea ika ika e paipai ai i ka ika ika.

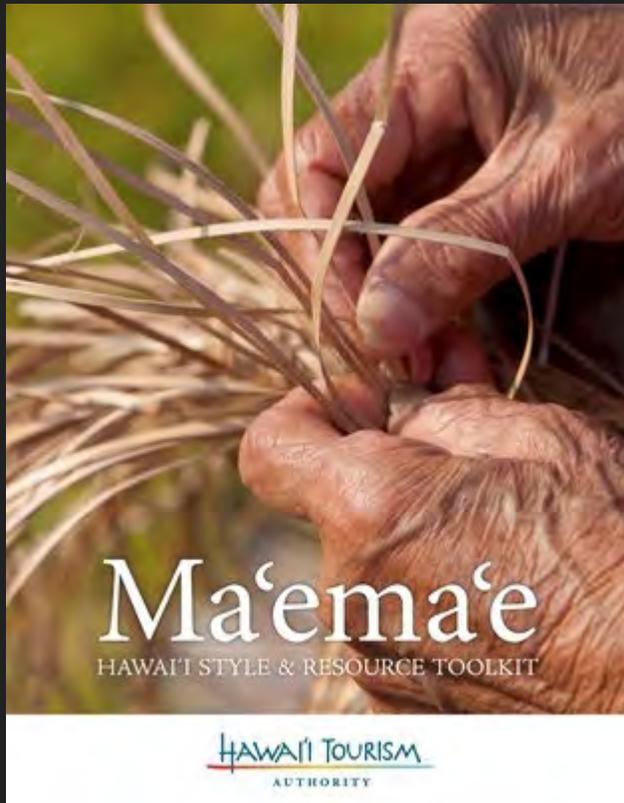
"E ka ika ika e, aku i ka ika ika e paipai ai i ka ika ika, a ka mea ika ika e paipai ai i ka ika ika. Ua ma ika ika e ika i ka ika ika, a ka mea ika ika e paipai ai i ka ika ika."

"E" o ka ika ika e paipai ai i ka ika ika, a ka mea ika ika e paipai ai i ka ika ika. Ua ma ika ika e ika i ka ika ika, a ka mea ika ika e paipai ai i ka ika ika.

'ŌLELO HAWAII'

- Provides \$350,000 of funding to programs that ensure Hawaiian language is supported and normalized as both an official language of the State as well as the foundation of the host culture that draws visitors to Hawaii

MA'EMA'E TRAINING



- \$15,000 to provide training for all GMT staff and contractors focused on improving the manner in which Hawai'i is promoted in a culturally sensitive, accurate & respectful manner.



Ke Kumuwaiwai Kūlohelohe Natural Resources

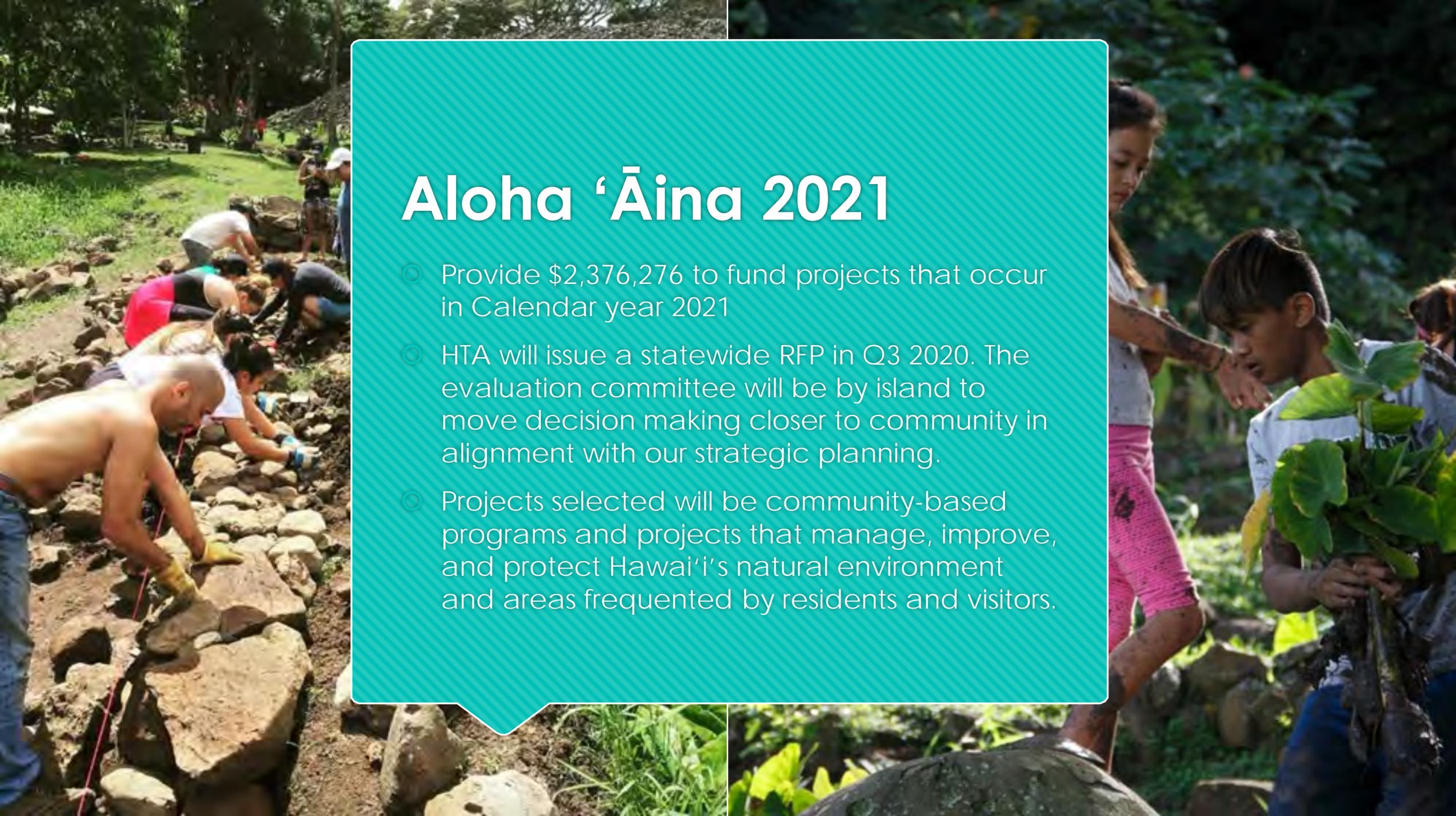
Dedicate resources to programs that enhance and support Hawai'i's natural resources and cultural sites to improve the quality of life for all of Hawai'i's residents and to enhance the visitor experience.

Guiding Principles

- Support, nurture, and amplify conservation and natural resource management by communities, nonprofits, and county, state, and federal agencies.
- Engage and encourage active education and management strategies of natural resources in areas frequented by visitors.

Strategic Choices

- 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.



Aloha ‘Āina 2021

- Provide \$2,376,276 to fund projects that occur in Calendar year 2021
- HTA will issue a statewide RFP in Q3 2020. The evaluation committee will be by island to move decision making closer to community in alignment with our strategic planning.
- Projects selected will be community-based programs and projects that manage, improve, and protect Hawai‘i’s natural environment and areas frequented by residents and visitors.

Examples of Past Projects

- Remove alien/invasive species
- Trash removal from natural resources areas
- Signage campaigns:
 - Inform proper etiquette/conduct
 - Cultural/historical information
 - Environmental assets
- Environmental stewardship projects:
 - Lo'i
 - Loko i 'a
 - Māla
- Protection of native animal habitats
- Re-establish native plants and animals



Visitor Impact Program

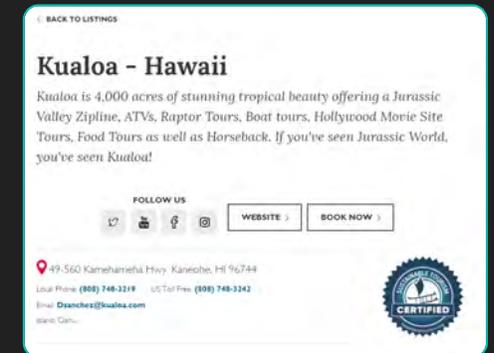




Visitor Impact Program

Sustainable Tourism Association of Hawai'i

- Provided funding to support ongoing certification efforts state wide and expand their training capacity.
- 47 certified operators statewide
- Estimated 2.3 Million visitors go on tour annually with a certified operator
- 1,500 FTE & 825 PT employees are employed and trained by certified operators



Hawai'i Green Business Program

- Provided funding to support ongoing certification efforts state wide and expand their training capacity.
- Saved:
 - 3 Million kWh
 - 66,413,000 gallons of water



DESTINATION MANAGEMENT RECOVERY ACTION PLANS FY 2021

PRESENTATION TO
HTA BOARD MEETING
JUNE 25, 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:

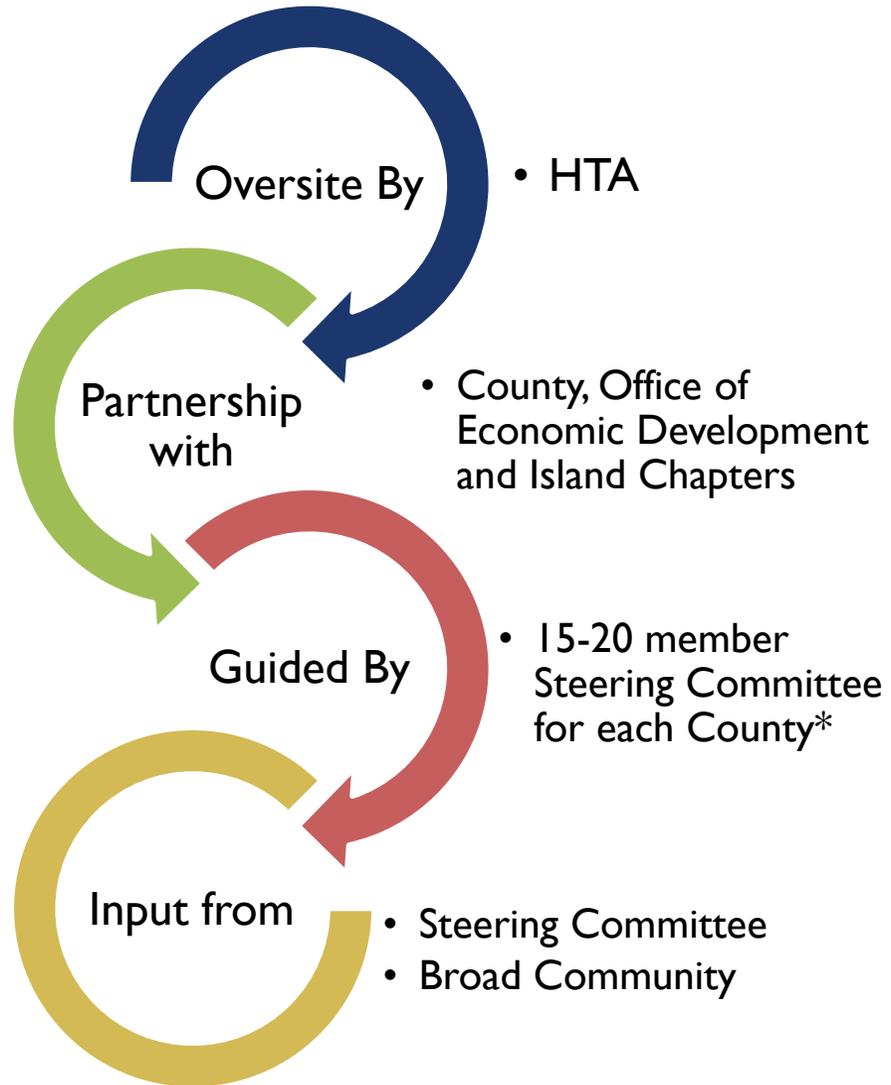
Partnership between community, county, island chapters, visitor industry, and other state entities.

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

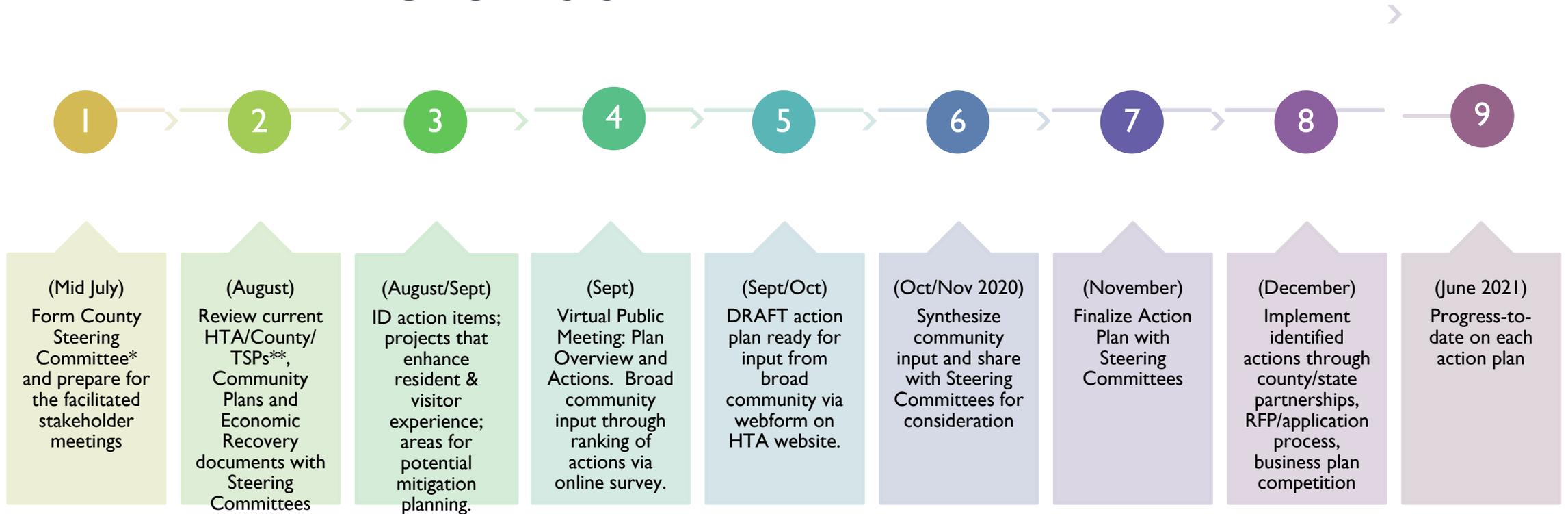


* Steering Committee includes representation from Island Chapter, Hawaiian Culture, Natural Resources, Hotel, Activities, Transportation, Agriculture, Chamber of Commerce/Business Association, Restaurant, Retail, Education, and Community members

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

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.

END RESULTS

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

10

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



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:

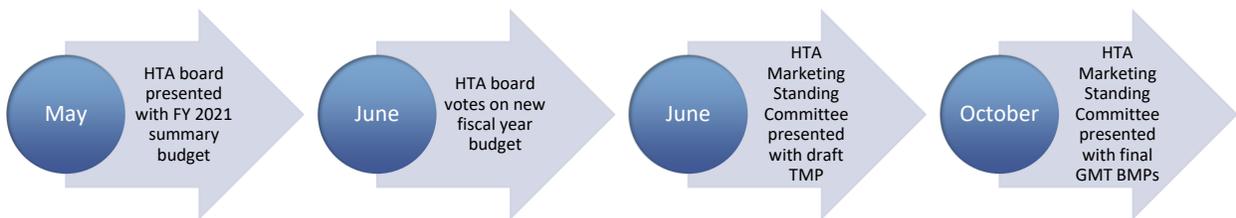
1. Statewide Hawai'i brand management efforts and programs;
2. Targeted markets;
3. Efforts to enter into Hawai'i brand management projects that make effective use of cooperative programs;
4. Program performance goals and targets that can be monitored as market gauges and used as attributes to evaluate 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:



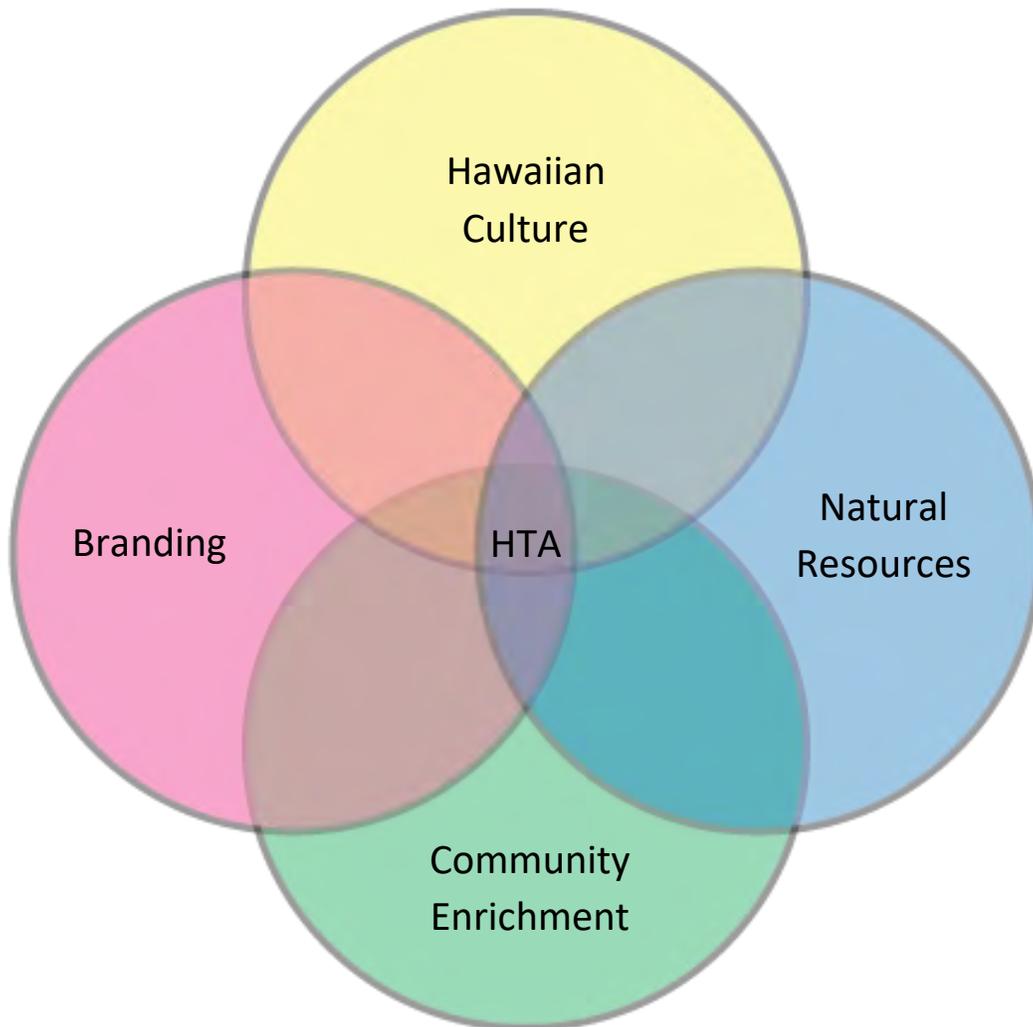
1.2 Planning Approach

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.

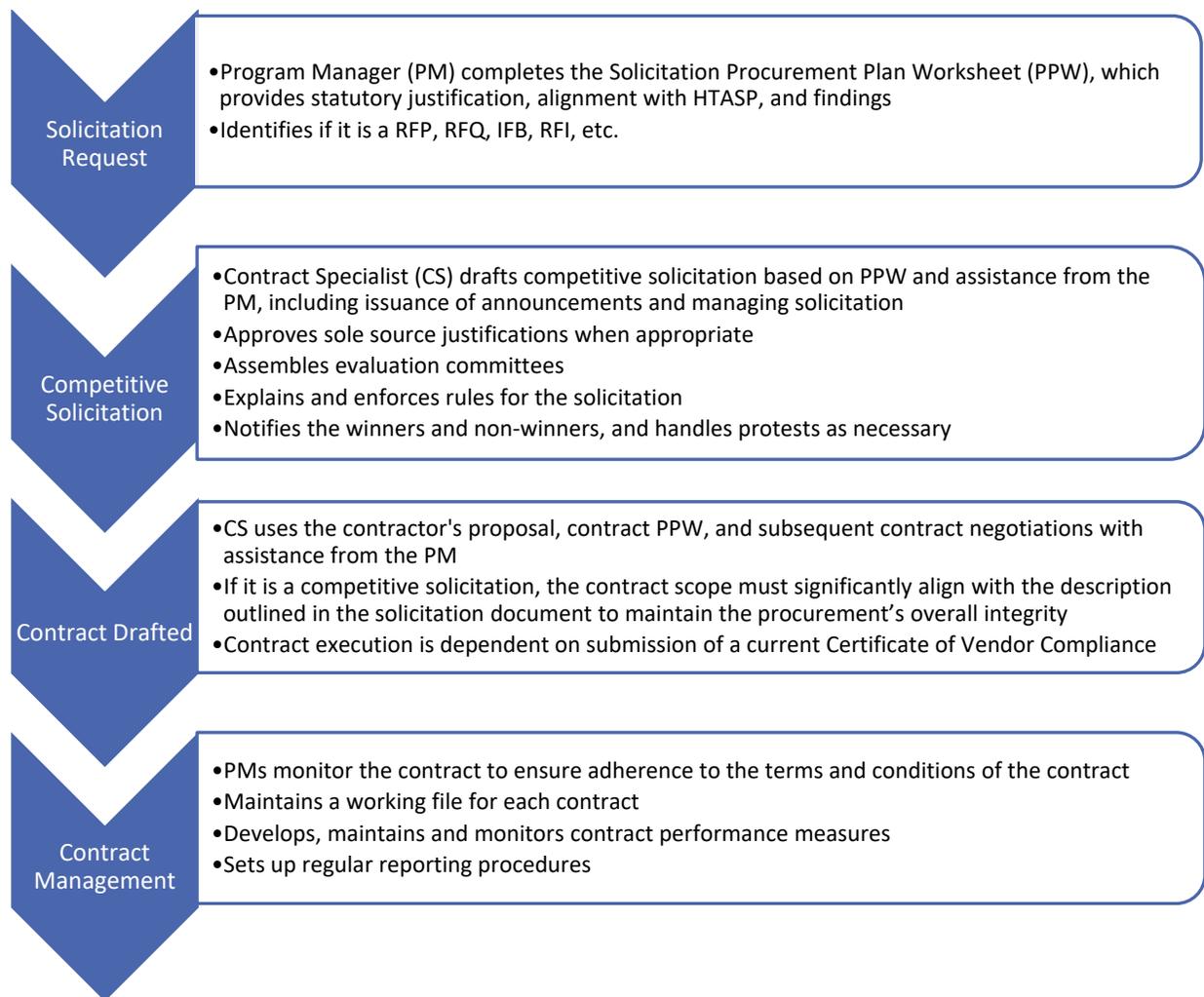
The HTA will strive to communicate the results of its efforts on a regular basis to the HTA Board of Directors, State Legislature, Governor, and the public.

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 41.90 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 Shiwaki

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.

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