



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

**HĀLĀWAI KINO A KIKOHO'E
IN-PERSON AND VIRTUAL**

**REGULAR BOARD MEETING
HAWAII TOURISM AUTHORITY**

Pō'ahā, lā 29 o Iulai 2021, 9:30 a.m.
Thursday, July 29, 2021 at 9:30 a.m.

Kikowaena Hālāwai O Hawaii'
Papahale 'Ehā | Lumi Nui C
1801 Alaākea Kalākaua
Honolulu, Hawaii' 96815

Hawaii Convention Center
Fourth Floor | Ballroom C
1801 Kalākaua Avenue
Honolulu, Hawaii' 96815

'O ka ho'opakele i ke ola o ka lehulehu ka makakoho nui. E maliu ana ke ke'ena 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.

Koi 'ia ka hō'oiā i kou olakino maika'i ma mua o ke komo i ke Kikowaena Hālāwai O Hawaii' ma ka 'ipuka 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.

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.

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.

Hiki i ka lehulehu ke hālāwai pū ma o ka ZOOM.
Webinar will be live streaming via ZOOM.

E kāinoa mua no kēia hālāwai:
Register in advance for this webinar:

https://us06web.zoom.us/webinar/register/WN_nBnbntIteiOHMOpiu057Q

Ma hope o ke kāinoa 'ana, e ho'ouna 'ia ka leka uila hō'oiā iā 'oe me ka 'ikepili ho'oku'i hālāwai. After registering, you will receive a confirmation email containing information about joining the webinar.



Papa Kumumana'o
AMENDED AGENDA

1. *Ho'omaka*
Call to Order
2. *Wehena*
Opening Cultural Protocol
3. *'Āpono I Ka Mo'o'ōlelo Hālāwai*
Approval of Minutes of the June 24, 2021 Board Meeting
4. *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)
5. *Hō'ike Na Ke Komikina Lula Maika'i O Ka Moku'āina*
Presentation by the Hawai'i State Ethics Commission Regarding an Overview of the State Ethics Code for State Board Members
6. *Hō'ike A Ka Luna Ho'okele*
Report of the Chief Executive Officer/Chief Administrative Officer/Chief Brand Officer Relating to Staff's Implementation of HTA's Programs During June 2021
7. *Hō'ike No Nā Hopena Kānāwai, Mo'okālā, A Hana O HB862*
Presentation of Legal, Financial and Operational Impacts of HB862 (Act 001, Special Session 2021) to the Hawai'i Tourism Authority and the Hawai'i Convention Center
8. *Hō'ike No Ko HTA Ho'okō I Ka Papahana Ho'okele Huliau*
Update on HTA's Implementation of Change Management Plan
9. *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
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 three RFPs for the US Major Market Area, Global MCI, Global Support Services for Discussion and Action by the Board



11. *Hō'ike, Kūkākūkā A 'Āpono I Ka Papahana Mālama 'Āina Ho'okipa O'ahu*
Presentation, Discussion and Approval of the O'ahu Destination Management Action Plan

12. *Hō'ike A Ka Hui Noi'i Loiloi Mo'okālā*
Report of the *Budgetary Review Investigative Committee* of their Meeting Held on July 27, 2021

13. *Kūkākūkā A Ho'oholo No Ka 'Ae I Ka Ho'onohonoho Mo'ohelu 2022*
~~Discussion and Action to Authorize Staff to Format a Partial Fiscal Year 2022 Budget Using Three Categories: (1) Payroll; (2) Operations; and (3) Brand Marketing; and, Authorize Specific Spending Amounts for each of the Three Categories; and Authorize Staff to Initiate the RFP Process to Expend up to \$28.5m on NA MMA, Global Conventions, and Global Support Contracts~~

Discussion and Action to Authorize Staff to Format a Partial Fiscal Year 2022 Budget Using Three Categories: (1) Payroll; (2) Operations; and (3) Brand Marketing; and, Authorize Specific Spending Amounts for each of the Three Categories; and Authorize Staff to Initiate the RFP Process to Expend up to \$28.5m on US Major Market Area, Global MCI, Global Support Services Contracts

14. *Hō'ike, Kūkākūkā A Ho'oholo No Nā Mo'okālā*
Presentation, Discussion and Action on HTA's Financial Reports for May and June 2021

15. *Panina*
Closing Cultural Protocol

16. *Ho'oku'u*
Adjournment

*** *Aha Ho'okō: Ua hiki i ka Papa Alaka'i ke mālama i kekahi hālāwai kūhelu i kū i ka Hawaii 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 Hawaii '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 Hawaii Revised Statutes (HRS) § 92-4. The executive session will be conducted pursuant to HRS § 92-5 (a) (2), § 92-5 (a)(4), § 92-5 (a)(8) and §201B-4(a)(2) for the purpose of consulting with the board's attorney on questions and issues pertaining to the board's powers, duties, privileges, immunities, and liabilities; to consider hiring and evaluation of officers or employees, where consideration of matters affecting privacy will be involved; and to discuss information that must be kept confidential to protect Hawaii's competitive advantage as a visitor



destination.

Ma lalo o ka māhele 531.5 o ka Budgetary Control Accounting Manual, Moku'āina o Hawai'i, he māhele ka 'aina awakea o ka hālāwai. E mau ana ka hālāwai ma loko nō o ka 'ai 'ana, 'a'ole ho'i ia he wā ho'omalolo.

Pursuant to Section 531.5, of the Budgetary Control Accounting Manual, State of Hawaii, lunch is served as an integral part of the meeting, while the meeting continues in session, and not during a break.

Kono 'ia ka lehulehu e komo mai i ka hālāwai a ho'ouna mai i ka 'ōlelo hō'ike kākau 'ia no kēlā me kēia kumuhana i helu 'ia ma ka papa kumumana'o. Hiki ke ho'ouna mai i nā 'ōlelo hō'ike kākau 'ia ma mua o ka hālāwai iā carole@gohta.net a i 'ole 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 or 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
June 24, 2021 Board Meeting



**REGULAR BOARD MEETING
HAWAII TOURISM AUTHORITY
Thursday, June 24, 2021 at 9:30 a.m.
In-Person and Virtual Meeting
Hawai'i Convention Center
1801 Kalākaua Avenue, Honolulu, Hawai'i 96815**

MINUTES OF REGULAR BOARD MEETING

MEMBERS PRESENT:

George Kam (Chair), David Arakawa, Kimi Yuen, Micah Alameda, Fred Atkins, Dylan Ching, Daniel Chun, Keone Downing, Kyoko Kimura, Sherry Menor-McNamara

MEMBER NOT PRESENT:

Ben Rafter, Sig Zane

HTA STAFF PRESENT:

John De Fries, Keith Regan, Pattie Herman, Marc Togashi, Kalani Ka'anā'anā, Marisa Yamane, Caroline Anderson, Jennifer Chun, Carole Hagihara, Maka Casson-Fisher, Lawrence Liu

GUESTS:

Charlene Chan, Nathan Kam, Erin Khan, Mike McCartney, John Monahan, Jay Talwar, David Pettinger, Alan Ellis, Jessica Lani Rich, Allison Schaefer, David Baronfeld, Barbara Okamoto, Chris Kam, Daniel Nahoopii

LEGAL COUNSEL:

Gregg Kinkley

1. Call to Order:

George Kam called the meeting to order at 9:30 a.m. He confirmed the attendance of the Board by roll call.

2. Opening Cultural Protocol:

Maka Casson-Fisher offered a song and chant saying that before the sun rises (hiki mai), they were asleep and communicating with their ancestors so that such dream state can be brought forward with sunrise to be able to perform the work with guidance and inspiration.

3. Approval of Minutes of the May 27, 2021 Board Meeting:

Chair Kam requested a motion to approve the May 27, 2021 Board Meeting. Micah Alameda made a motion and it was seconded by Daniel Chun, and unanimously approved.

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

Chair Kam asked whether there were any permitted interactions and there were none.

5. Report of the CEO Relating to Staff's Implementation of HTA's Programs During May 2021:

- **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**
- **CEO's Assessment of Priorities for the Next 30-60 Days**

Chair Kam recognized John De Fries to provide an update. Mr. De Fries said that the CEO report containing activities of the past month has been uploaded and they would be open to answer any questions. Mr. De Fries reported that the priorities for the next 30 to 60 days would be centered in caring for Hawai'i. He noted that the President Carla Murray and SVP Bob Kharazmi of Marriott International committed themselves in supporting HTA to the fullest extent during their meeting late last month. He shared his thoughts on a Washington Posts article, "How to be a better tourist in Hawai'i according to locals". He reported that he provided an update at the Senior Leader Policy Meeting yesterday regarding visitor arrivals from June 13 to 19, visitor arrival forecast by DBED and UHERO, and tax generation which is estimated at \$227.43 million for FY 2021. He added that there are major concerns with the slowing down of vaccination rate in Hawai'i and with the spread of COVID Delta variant in their key markets and that their priority is to keep the spread from happening as best as they can. He informed of Star Advertiser's editorial page write-up about vetoing HB 862 to allow the tourism authority to succeed and added that organizations are making their desires known in support with HTA. He said that they will continue working on the Change Management Plan which will be discussed later.

Mr. Alameda thanked the HTA Board and staff for their efforts for the Merrie Monarch Festival will happen this year and for He for the rolling out of the platform series, Nūhou Mondays, which highlights a project to preserve and digitize the Hawaiian language newspapers by Bishop Museum.

Ms. Yuen asked Ms. Anderson to highlight the implementation of the DMAP project in each of the islands. Ms. Anderson reported that for the Kauai DMAP, they will be providing funding to the Kauai County to help them market and educate potential visitors on different modes of transportations. She added that they will be helping them to open up retail and networking space for vendors that make Kauai-made products. She said that they supported Maui visitors at the Convention Bureau and they produced brochures related to their County's Mālama Maui mandate without producing any HTA funding yet. She noted that they convened meetings with state, local, federal agencies to address immediate impacts to the Hana area. She added that they will be meeting with the steering committee of Oahu next Friday for their affirmation of the action plan which will undergo the Board's approval on July. She reported that they've been working with the County and IHCB in working on the issues of three hotspot areas: Hilo Valley, Green Sands Beach and Pololū Valley.

6. Presentation and Discussion of Current Market Insights and Conditions in Hawai'i and Key Major Hawai'i Tourism Markets

Chair Kam recognized Jennifer Chun to provide an update. Ms. Chun reported that because of the timing of the BOD meeting, the visitor stats will not be available until next week. She noted that the DOT has preliminarily collected \$36.5 million TAT for May which was \$165.5 million YTD for Fiscal 2021 and down 70.2%. She added that the Fiscal 2020 YTD TAT Collections of \$555.6 million is down \$390.1 million.

Ms. Chun reported that the hotel occupancy for May is at 61.5% at \$288 ADR and \$177 RevPAR rate which is lagging compared to 2019. She noted that the occupancy of vacation rentals is similar to 2019 and the ADR is significantly lower than 2019. She noted that the 2021 room night supply is inching up to the 2019 levels and that there are much less vacation rentals inventory compared to hotels. She said that air seats to Hawai'i are going towards 2019 levels although flights are greater in 2021 than in 2019 because of the aircraft configuration that are flying in. Ms. Chun provided a walkthrough of how to navigate the Symphony Dashboards which is now live in the HTA website.

7. Presentation by the Omnitrak Group of the Resident Sentiment Survey Results

Chair Kam recognized Chris Kam to provide an update after Ms. Chun's presentation. Ms. Chun provided a brief history of the frequency and updates made with the Resident Sentiment Survey. She said that they will present the Spring 2020 Resident Sentiment Survey, noting that the current contract includes the option of focus groups with 4 to 6 participants per group (O'ahu, Maui, Moloka'i, Lāna'i, Kaua'i, Hilo and Kona group) consisting of Hawai'i residents ages 18 and above. She noted that they will have a brief

discussion about the issues of focus groups.

Mr. Kam reported that the growth of the industry, growing people's concern, and the pandemic enabled them to re-evaluate the resident sentiment survey. He noted that added in the survey is the item "Is tourism in Hawaii worth it?" which gained 3 out of 1 response affirming that the industry is worth all the issues that it is associated with. He said that the following have the strongest positive perceptions: people from Oahu, 55 to 64 years old at 82%, \$100,000 and above income, living in Hawaii for 20 years up at 77% (74% are born in Hawaii). He added that those with the highest negative perceptions are as follows: 18 to 34 years old at 30%, and less than a year residency in Hawai'i 32% (40% born in Hawaii). He said that resident benchmark ratings of current efforts to better manage tourism are mixed, with a little more than half not agreeing that they were going well and under half agreeing and not sure. He said that this sets the stage for improvement of tourism and that initiatives that grow the economic and quality of life integrated with managed tourism efforts hold the most influence for improving resident sentiment.

Mr. Kam reported that more specific strategies that can be implemented to managed tourism fell under three tested categories: Regenerative, Accommodations, and Access. He noted that the following resonated with the residents: visitors and residents education to Mālama each other, encouraging visitors to volunteer and give back (Regenerative); elimination of illegal vacation rentals, stopping approval of additional vacation rentals and building units (Accommodations); and charging visitor access fees to state parks and trails, and designation of resident only days of the week at some state parks, beaches and trails (Access). Mr. Kam reported that data shows that the strongest drivers of resident sentiment are having programs associated with improving the economic impact of the visitor industry (supporting local businesses and other industries and creating well-paying jobs) and quality of life (creating shopping, restaurants and entertainment opportunities, sponsors festivals and enhancing quality of life). He stressed that it's not only Managed tourism that's going to drive resident attitude towards the visitor industry.

Mr. Ka'anā'anā said that the resident sentiment is one of the four key KPIs from the strategic plan. He noted the importance of the data presented for improving resident sentiments and that the DMAPS are directly correlated to the three top things which are driving the economic impact, quality of life and managed tourism. Ms. Chun noted that when the survey was fielded, there were DMAPs that were completed and so with the next round of the resident sentiment survey, there will be implementations that have happened and this will be a good indication to see the difference.

Ms. Kimura asked the difference between 2019 and 2021 data. Mr. Kam responded that

there is basically a decrease in 2022 resident sentiment compared to the previous years, which is part of the general downward trend. He suggested that despite the drastic changes in volume that the market have, people have the set of attitude about the visitor industry at this point which will take time to resolve and turn around.

Mr. Chun asked their thoughts on the discrepancy between 3 out of 4 residents who thinks tourism is worth it compared to the lower percentage of residents who thinks tourism brings in more benefits than problems. Mr. Kam responded that people still see the industry as one that does have a certain amount of frustration associated with it (i. e overcrowding, traffic, higher cost of living) but decides that it's still worth it after contemplating on it. He added that they still favor having this industry rather than not having it and managing tourism is one of the things that will make them feel better as long as it's integrated with economic benefits and quality of life. Mr. Arakawa said that HTA and their partners need to do a better job in communicating and educating the public and policy makers about efforts in addressing the concerns of the residents. He cited a good example of Ms. Anderson's presentation and doing this more will make these numbers change.

Mr. Atkins asked about the timing of the next survey. Ms. Chun responded that the intention is to do a request for biannual proposal for Fiscal 2022 and that she hopes to field it in summer and early spring and winter so the duration is more even. Ms. Chun asked what topics the Board wanted to focus on if they wanted to have focus groups. Mr. Chun responded that twice a year will yield the results they want and that focus groups will help with one key piece that's missing which is the two-way communication. He added that this will enable them to hear from the community like the types of changes they wanted to see, ideas to make changes with regards to managing tourism and from there can see how it aligns with the DMAP and other initiatives that they're doing and to build trust. Mr. Atkins agreed with Mr. Chun and said that the next survey will be done differently in that they have a benchmark and that when they do it, it will be revealing with all the questions asked during the pandemic giving time for the residents to think about no tourism and the explosion of numbers coming to Hawai'i.

The Board continued to discuss Mr. Downing's suggestion about asking the community what their questions are and Mr. Arakawa's suggestion to use the DMAP community meetings to get the questions. Ms. Chun noted that the focus groups will be small groups (4 to 6 people per island) delving about specific issues and not any community meeting. She added that the Board should be aware that the DMAP people may have different questions than the questions asked with the resident sentiment survey and might not have direct connection with Mr. Kam's presentation. Ms. Herman said that she wanted to be sure not to revisit the DMAP again with the focus group. She added that people on the focus groups

should be handpicked to have a healthy debate between them because getting a group, like the beach masters, will garner the same opinion. Mr. Chun asked Ms. Chun's thoughts on the topic that will be helpful to pursue with the focus groups in the context of resident survey. Ms. Chun responded with the survey results available, asking people about their thoughts on what are the problems and how to improve efforts to manage economic benefits of the visitor industry with the resident's quality of life will tie in to the questions that the HTA is asking in the survey. Mr. Arakawa suggested that the staff will have to discuss about it and provide a proposal for the Board to approve.

Mr. Regan read a question from Sen. Glenn Wakai asking about the goals for the various categories, that HTA should be creating a plan to hit those goals and that HTA can and should do to define success. Mr. De Fries responded that the conversation that just took place is part of it, and he would be happy to spend more time with the Senator to make sure that they're addressing his questions and to work with OmniTrak as well. Mr. Arakawa responded that it's about taking the data of the resident survey and what HTA's next steps are and timeline to get there and that the Board would be happy to listen to next meeting. Mr. Chun said that he thinks it's the work that they're doing now and just needs to do a better job at communicating the great work that's happening to try to change the sentiment. Mr. Regan said that with defining success, he thinks that it's about setting targets and establishing target benchmarks, goals to look at and try to achieve in order to succeed. Chair Kam said that they all agree with that which will be discussed in agenda number nine. Ms. Yuen commented that the drivers of the resident sentiments will help HTA do what the Senator is asking for in prioritizing next steps.

8. Presentation of the Hawai'i Tourism Authority's Visitor Satisfaction & Activity Report (VSAT) Special COVID Survey

Chair Kam acknowledged David Pettinger, President of the Anthology Research Group, to provide an update. Ms. Chun reminded that this is a special survey that is separate but related to the normal visitor satisfaction activity survey. Mr. Pettinger reported that this is the third survey which has been done every three months since December. He noted that the online survey was conducted on June 2 to June 8, 2021 among 498 U.S. Mainland visitors who were in Hawai'i from May 15 to 24 with a 4.39% margin of error at a 95% level of confidence. He said that visitors are almost entirely universally aware of the requirements before coming to the island. He noted that the percentage of difficulties with the testing process decreased compared to the first survey. He added that many of the issues encountered are problems with the Hawai'i Travels website which have increased significantly to 29%, high cost of testing at 23%, issues with testing partner at 21% and with confusion regarding the type of test requirement at 20%. He noted that the problem with a

72-hour window for test results being unreasonable dropped from about 50% to 12%. He said that there's a decrease in the number of tourists who were aware of limited tourism amenities and that nearly everyone were aware of the local government mandates.

Mr. Pettinger reported that visitors having excellent experience during their stay had significantly decreased from 85% to 76% although most visitors had a fairly good experience. He added that the higher income and multi-island visitors were less satisfied than the lower income and single island visitors. He noted that this could be due to the testing and travel protocols in place from going to one island to another. He added that to increase their ratings to excellent mark, factors such as limited amenities and restaurant capacity, confusing rules related to COVID -19 and overcrowding needs to be improved. Mr. Pettinger reported that the current visitor satisfaction rate decreased from 2019 pre-pandemic though still at high levels of satisfaction. He said that the likelihood to recommend Hawai'i to relatives and friends in the next six months is down to 64% and that those likely to recommend are from 18-34 age group and with a single island visit. He added that 20% of those who are unlikely to recommend said that they will recommend Hawai'i once the pandemic is over saying that travel is a hassle at this time and testing requirements are unreasonable.

Mr. Pettinger reported that components contributing to levels of excellent satisfaction are friendliness of hotel workers and residents at 79%, shopping and attractions at 61%, dining and restaurants at 56% with 14% saying it's below average or terrible, hotel and lodging at 73%, air travel/airport experience at 57% with 17% giving a below average or terrible score, ability to do things at 54% with 18% giving low scores, and ground transportation at 51% and 21% low scores. Mr. Pettinger said that when repeat visitors were asked to compare of their pre-pandemic visit to the present visit, 13% of them said that overall the trip was a lot more enjoyable, 19% are somewhat more enjoyable, 25% said that there were no difference with 44% saying it's much less or less enjoyable. He said that when asked why it was less enjoyable and a lot less enjoyable than their previous trip, 24% mentioned the limited availability or capacity of restaurants and attractions, 22% for too many COVID restrictions, 16% for rental car availability or cost, 13% for overcrowded with long lines or wait times to get where they wanted to go, and 11% for need for COVID test results. He said that overall visitor satisfaction dropped from pre-pandemic to during pandemic trip at 19% with a decrease in the ability to do things at 40%, in dining or restaurants and ground transportation at 34% and 33% respectively, in shopping and attractions at 30%, air travel or airport at 28%, friendliness and hotel or lodging both at 13%.

Mr. Pettinger reported that for trip expectations of the overall sample, there is an 8% decrease of those whose trip exceeded their expectations, stayed at 52% for those who met

their expectations and 14% was left disappointed based on their expectations before coming to the state. He noted that first-time visitors were likely to feel their trip exceeded expectations and is highest among travelers under 35 years of age and declines with age. He added that the more affluent visitors (combined incomes above \$100,000) were less likely to agree that the trip met their expectations. He noted that the highest reasons for disappointment were difficulty in getting reservations at restaurants or attractions and mask wearing at 15% or restrictions and closure of business and attractions at 14%. He noted that there are a wide distribution of factors contributing to their dissatisfaction which includes too expensive, too crowded and lack of rental cars based on the number of visitors in the islands compared to before where there's more of clustering between quarantine and closure of businesses. He noted that as more visitors arrive and expectations increase, fewer visitors indicated that they were able to do all of the activities they planned to do. He added that what got in the way was the difficulty accessing restaurants and attractions and inability to rent a car as the top concerns. He said 56% will likely visit Hawai'i again whenever they want to regardless of the pre-visit requirements, 23% will visit again once the pandemic is over and most or all of the COVID mandates are removed, 11% will visit again when there is no quarantine and testing required, and 10% had no plans to return which is especially true among visitors from the U.S. East who have a harder time getting to Hawai'i.

Mr. Pettinger reported that Hawai'i's relatively low infection rate's importance for deciding a trip saw a fairly flat rate in the course of the survey since December with 56% saying it has no bearing or impact. He said that their perception to COVID-19 impact on health saw an increase of 6% from 2% for those who see it as not a concern to public health. He noted that the proportion of visitors who feel skeptical about the government's position regarding COVID-19 has risen from 12% to 19% within three months. He added that 89% of the visitors were fully vaccinated and only 8% said that they will not get vaccinated. He noted that repeat visitors, more affluent and higher education categories are more likely to be vaccinated. He added that 92% of those who chose not to be vaccinated don't see COVID 19 vaccine as an incentive to get vaccinated, 3% gets them more motivated to get the vaccine, and 5% are somewhat more likely to get it. He said that the relaxed mask wearing mandates impacts roughly one in four respondents in their likelihood to visit Hawai'i again. Mr. Pettinger reported that the Safe Travels website continues to be the universal source of information at 93% and families and friends as 38%, GoHawaii.com at 28%. He noted that the response rate is higher than average for this survey and the proportion of visitors at the highest income category is at 16% from 18% and tends to have lower level of satisfaction than less affluent visitors.

Mr. Ka'anā'anā said that this is the second of the four KPIs in the strategic plan that HTA is

focused on addressing to measure success and accountability for its work. He acknowledged Mr. De Fries for participating and coordinating in the senior policy leaders meetings about Safe Travels. He asked what can be done with technology as an agency to strategically manage tourism, how to advocate opening businesses and what it looks like for residents, jobs, economy and visitor experience.

Mr. Ching noted that when the population can't get the basic necessities like food, it's changing their sentiment which puts a burden on other businesses and in turn put stress on local people working on these businesses. He added that hotels are somewhere between 50% to 60% capacity. He added that during the pandemic, locals were able to go to restaurants that they didn't usually go to and now can't get in because of advanced bookings and reservations from visitors. Mr. Atkins said that in their hotel in Kauai, they're at about 60% and the six feet in between the tables confine them to the numbers with five days out in terms of reservations. He added that they are also experiencing a 20% to 30% no show. Ms. Menor-McNamara agreed and said that they're hearing it from businesses too and that it will continue to linger both on a resident and visitors level until they fully reopen as Hawai'i seems to be the only state not fully open.

Chair Kam asked if a 2-week heads up is reasonable so the hotels can plan with reopening fully. Ms. Menor-McNamara responded that that's what she's hearing from some of their members at least. Mr. Ching said that at least a week is needed to plan to provide a good product and service to locals and visitors. Mr. Atkins noted that this is not only a result of the COVID restrictions but that there's a real labor shortage as well wherein activities that used to operate for seven days are reduced to four days. Ms. Kimura said that the labor shortage in Maui is the same with restaurants closing because they can't take a day off. She added that one restaurant is taking in labor force that is just out from college with no background check, interview or anything.

9. Presentation, Discussion and/or Action on HTA's Change Management Plan.***

Chair Kam acknowledged Mr. De Fries to provide an update. Mr. De Fries read the resolution concluded from the Board meeting in May which includes providing him as the CEO the authority to realign and reorganize the HTA's strategic plan budget and operations with a written summary of the proposal or the Changed Management Plan for submission to the Board for approval on the June 2021 meeting. He referred to item 9A of the handout at their desk with an introductory memo from him itemizing each of the attachments which include the distillation of HTA's 2020 - 2025 strategic plan, new structure and change management implementation plan and strategic communications plan. He noted that Mr. Ka'anā'anā was given the added assignment to spearhead the creation of the plan in May.

He added that the proper name provided by Ilihia Gionson of Hiehie Communications for the Change Management Plan is Papahana Ho'okele Huliau because the plan requires the skills of navigators having the transformative force to deal with. He turned over the floor to Mr. Ka'anā'anā. Mr. Ka'anā'anā reported that the presentation will take them to the 9B attachment with the realignment and reorganization of HTA and its role in the future. He noted that HTA's business model summarizes and aligns HTA's 2020-2025 Strategic Plan which consists of six elements: Drivers (stakeholders), Enablers, Core Areas, Deliverables, Objectives (Pillars), and Goals. He explained that the community, visitors, industries and government that HTA needs to partner with are groups that drive HTA's strategic plan. He said collaborative competition, communication, competencies and cultural values are HTA's toolset (enablers) to engage stakeholders and support its core areas. He added that research, brand marketing & standards setting, community convening, funding and resource development (core areas) are internal functions that support all of HTA's operations and that resident satisfaction, visitor satisfaction, average daily spend and total spending (deliverables) are measures of effectiveness of programs, services and products. He said that the objectives are strategic priorities aligned with the HTA's four pillars and that HTA's ultimate purpose or goal is "Mālama Ku'u Home" through regenerative tourism.

Mr. Regan led the discussion on the Change Management Implementation Plan. He noted that the plan is a draft and hopes to extract additional information from the Board to help build out the plan. He said that due to time constraints, he will just explain the first column but will take questions for the other columns as well. He said that the strategic plan is a critical component of HTA's activities and that it is a living document that needs to be re-evaluated and realigned with the marketing plan and the DMAP to grow. He noted that good and solid corporate governance is needed for the Board to function properly, which means revisiting and updating the bylaws, code of conduct, and procurement. He proposed for new Board members to undergo orientation on HTA's activities and the ability for existing ones to join for them to be refreshed. He added that procurement training for the Board and staff is also needed. He said that they are ensuring the budget left for the current fiscal year are used properly given the uncertainty of what's to happen on the next fiscal year. He noted that organizational structure, job descriptions, organizational chart and employee handbook needs to be reviewed, re-aligned and updated to the new strategic plan. He added that they will continue to participate in providing inputs as representatives of tourism to the HEMA & County Preparedness Exercise. He said that they need to review and support visitor assistance programs and develop safety awareness programs that address visitor-focused safety concerns. He said that it's important to be connected with

the industry, to have focused communications, to share information with the industry and to educate visitors.

Mr. Ka'anā'anā reported that the core areas of the strategic plan are what organized the matrix in the change management plan that they're on. He noted that research and data analytics drive the decision-making that's being done, and they're continually improving and enhancing it. He noted that with community and cultural history, they're focused on taking the program activities and pairing it to set standards, on sustaining these programs and protecting the brand, and on developing the Mālama Hawai'i messaging. He said that they are working to ensure that tourism can become a catalyst for other industries like agriculture and to continue with the GMT outreach done globally to ensure consistency in the responsible travel messaging. He added that they need to look at addressing hot spots and building diverse stakeholders to get them to the solutions. He said that they are looking on how to coordinate problems with the government for solutions and how to empower people closest to the problem, how to make resources accessible to them by utilizing technical assistance, and making sure that the community are seeing the benefits. He added that for funding and resource development, they're finding new ways to make resources available and develop funding. He noted that with conservation and resilience, they are looking into how to protect what makes Hawai'i Hawai'i and on the role that technology has to play in it. He added that Aloha Intelligence will play a key role and Artificial Intelligence will also help them do the work smarter and not harder.

Ms. Yuen and Mr. Chun acknowledged the great job done by the staff. Mr. Atkins agreed and asked if there can be a staff to handle those responsible for different areas of the budget like sports and culture. Mr. De Fries said part of their next steps is to assign the teams for the communication to be direct and concise.

Mr. Ching asked how often they plan to revisit the Strategic Plan. Mr. Ka'anā'anā responded that they will revisit each column yearly to prepare for the HTA Management Plan for the year. Mr. De Fries said that it will be a framework for the monthly BOD meeting which will appear in the agenda. Chair Kam said that some components need quarterly and bi-annual updates so it's a living document that they'll be working to. Mr. Arakawa recognized their work and suggested to look at it again on May and to include it in monthly meetings. He also suggested having a separate committee to track it in the July meeting and the committee can report as part of the BOD and can look at setting priorities, when the budget is known.

Mr. Alameda acknowledged the work and asked if they will try to hit all benchmarks. Mr. De Fries responded that each one is important and it's just a matter of scheduling. Mr. Atkins

suggested delivering it to the legislative offices as first step in going one-on-one with them. Mr. Arakawa asked Ms. Yuen if she can talk to the Board about starting a newsletter to be given to policymakers. Ms. Yuen responded that the idea of a one-page newsletter came from Ms. Anderson as a way of updating the DMAP. Ms. Anderson responded that it's been put out in a bulletin which will go up to the legislators also. Ms. Yuen suggested adding under community convening the cross industry collaboration as a number one thing to change resident sentiments and to specify that they are supporting the local communities. Ms. Kimura asked if there's already a new job description and ready to go. Mr. De Fries said that they are into executive sessions.

Chair Kam asked if there are any questions from the public and there were none.

Mr. Arakawa requested a motion to approve the written summary of the HTA's Change Management Plan as presented by John De Fries and staff that first went to Resolution 2021-2-1, which includes all documents presented to the Board in both open and in executive session. Chair Kam made a motion and Mr. Alameda seconded and was unanimously approved.

10. Closing Cultural Protocol

Mr. Casson-Fisher closed the meeting with a chant for the intention of "Pule Kala" or asking for forgiveness for transgressions done intentionally or unintentionally to each other, to the space, seen and unseen.

11. Adjournment:

The meeting adjourned at 1:26 pm.

Respectfully submitted,

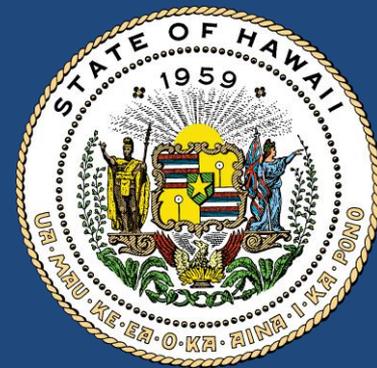


Sheillane Reyes

Recorder

5

Presentation by the Hawai'i State Ethics Commission
Regarding an Overview of the State Ethics Code for
State Board Members



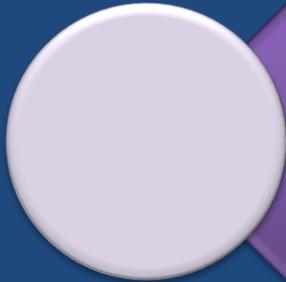
Ethics for State Employees

Hawai'i State
Ethics Commission

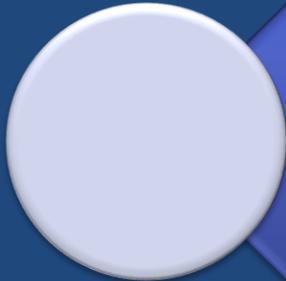


- Hawai‘i Constitution, Art. XIV
- To preserve public confidence in public servants

Ethics Code Applies To:



State Employees



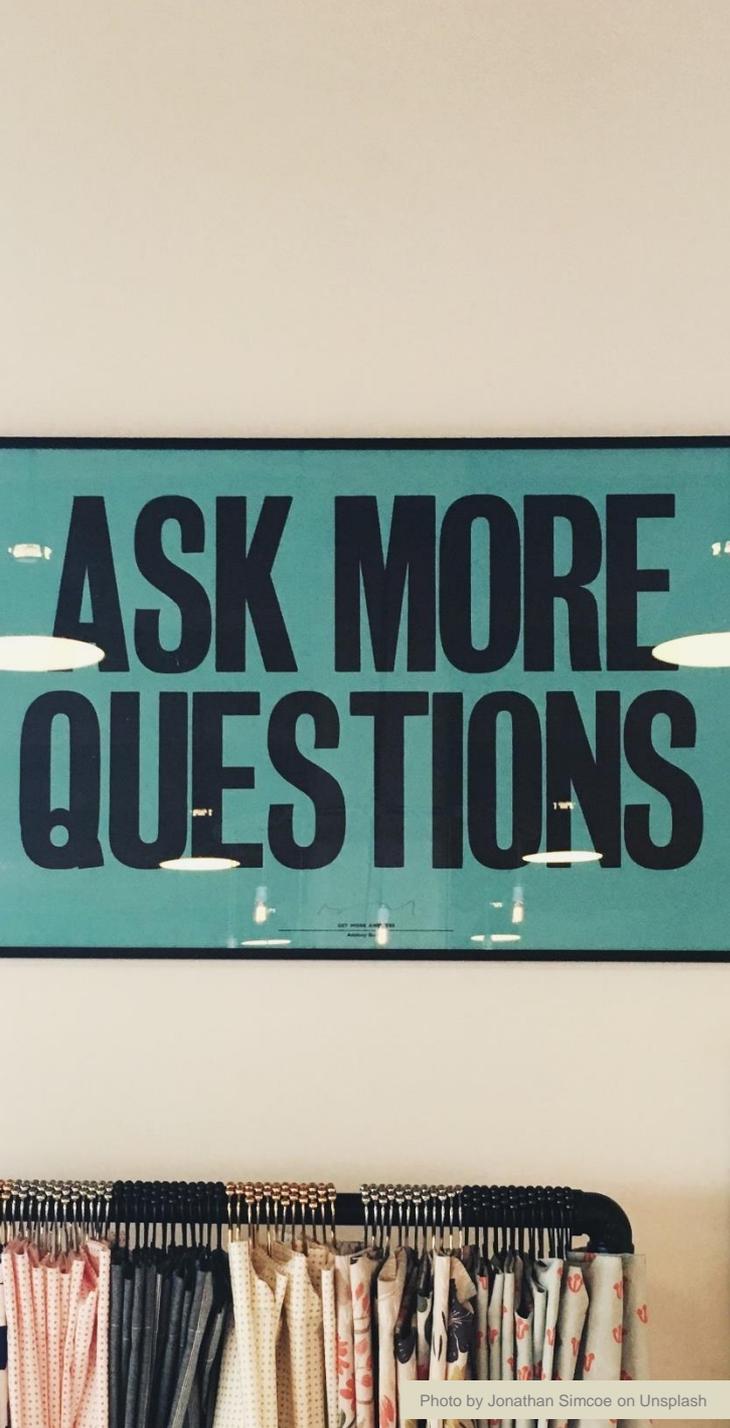
State Legislators



State Board &
Commission Members

Hawai'i State Ethics Commission





**ASK MORE
QUESTIONS**

Ethics Guidance

- Telephone/Email
- Staff Letter
- Advisory Opinion

All Advice is Confidential

Penalties

- Fines up to \$1,000 per violation
- Disciplinary action
- Recovery of gifts or profits
- **Contracts or action voidable**

Topics

Confidential Information

Gifts / Gifts Reporting

Fair Treatment

Conflicts of Interests

Contracts

Financial Disclosures

Post-Employment

Confidential Information



Confidential Info

HRS § 84-12

Do Not Disclose Info

Do Not Use Info
for personal benefit



Gifts



A state employee is offered the following items:

- A. A box of manapua from a construction company that has several large contracts to perform work for the employee's agency.
- B. A \$100 gift certificate to a restaurant from a member of the public who wishes to thank the employee for her help addressing an issue.
- C. An invitation from a non-profit organization to participate in a charitable golf tournament or to attend its annual banquet.
- D. An offer to travel to California to attend a professional conference.

Are there problems with any of the above?

Gifts

HRS § 84-11

No employee shall accept or solicit any gift if it is reasonable to infer the gift is offered to influence or reward official action.

Gifts



Food



Gift
Cards



Concert
Shows



Special
Events



Travel

Anything of Value

GIFTS

Factors to consider:

- **VALUE:** How much is the gift worth?
- **RELATIONSHIP:** What is the donor's relationship to the recipient? Does the recipient take official action affecting the donor?
- **STATE PURPOSE:** Does the gift benefit the State?

A state employee is offered the following items:

- A. A box of manapua from a construction company that has several large contracts to perform work for the employee's agency.
- B. A \$100 gift certificate to a restaurant from a member of the public who wishes to thank the employee for her help addressing an issue.
- C. An invitation from a non-profit organization to participate in a charitable golf tournament or to attend its annual banquet.
- D. An offer to travel to California to attend a professional conference.

Are there problems with any of the above?

Gifts

1. Can you accept the gift?
(HRS § 84-11)



2. If you can accept the gift, must
you report it?
(HRS § 84-11.5)

HRS § 84-11.5

Gift Disclosures

Due: June 30th

> \$200 in value

Donor has interests
that may be affected

June 1 - May 31

Exemptions

[Search](#)[LOGIN](#)[HOME](#) [ACCESS PUBLIC DISCLOSURES](#)

WELCOME TO THE HAWAII STATE ETHICS COMMISSION'S E-FILING SYSTEM

New Electronic Filing System for Financial, Gift, and Candidate Disclosures

Welcome to the Hawaii State Ethics Commission's new electronic filing system for financial, candidate, and gift disclosures. The E-Filing System allows you to file your disclosure electronically and save your documents in one location, making it easier for you to manage your filings.

Account & Browser Requirements

To get started, click **LOGIN** (top right of page). If you are a new user, please click "**Sign Up**" to create an account. If you already have an account, enter your email and password. We recommend that you use Google Chrome, Mozilla Firefox, or Safari.

How to File a Disclosure

After you log-in, click on **MY FINANCIAL DISCLOSURES** or **MY GIFT DISCLOSURES** or **MY CANDIDATE DISCLOSURES** on the menu bar and then click "**New**" to create a new disclosure. Need further assistance? Please see [Financial Disclosures E-Filing Guide](#) or [Gift Disclosure E-Filing Guide](#) or [Candidate Disclosures E-Filing Guide](#).

Update Contact Information

Please remember to update your contact information under "**My Profile**" and adjust your spam filter to receive automatic email reminders and other notices. **Changed your email? Please call the Commission to update your account.**

Need Help?

If you need any assistance, please call us at (808) 587-0460 (7:45 a.m. to 4:30 p.m.) or e-mail us at ethics@hawaiiethics.org.

2018 Disclosures Filing Deadlines

Thursday, May 31

- Financial Disclosures for State Officials

Monday, July 2

- Gift/Travel Disclosures

Monday, July 23

- Candidate Financial Disclosures

Quick Links

Hawaii State Ethics Commission's website

- <https://ethics.hawaii.gov/>

Financial Disclosures

- [Financial Disclosures E-Filing Guide](#)

Candidate Disclosures

- [Candidate Disclosures E-Filing Guide](#)
- [Campaign Restrictions for State Officials](#)

Gift/Travel Disclosures

- [Gift Disclosures E-Filing Guide](#)
- [Quick Guide on Gifts](#)

Fair Treatment



Fair Treatment

HRS § 84-13(a)

- No unwarranted privileges, exemptions, advantages, contracts, or treatment.
- No extra “perks” for doing your state job.

A member of a state commission is the keynote speaker at a conference held by the Hawaii Chocolate Growers' Association; she spoke about Hawaii's commitment to local agriculture. After the conference, the Association offered the commission member an honorarium of \$250. What should she do?

- A. Decline the money.
- B. Accept the money, but report it as taxable income.
- C. Donate the money to her office's holiday party.



Fair Treatment

- Additional or “Double” Compensation
- Using state position to seek private work or contracts
- Financial transactions with subordinates

A state employee's son belongs to a little league team that is trying to raise money for uniforms. Can she sell fundraiser tickets for lau lau and sushi to her co-workers?

- A. Yes, because it will benefit a good cause.
- B. No, because private fundraising cannot take place in state offices.
- C. Yes, because the employee's colleagues don't seem to mind.





Fair Treatment

- Using state resources for private business purposes
- Includes for-profit & non-profit businesses
- Fundraising exception: AUW or other State-endorsed activities



State Resources

- Office equipment (computers, copiers, telephone)
- State email system
- Office supplies

A close-up, slightly blurred photograph of several US dollar bills. The focus is on the portrait of George Washington on a one-dollar bill, with the word 'DOLLAR' visible. Other bills are stacked behind it, showing various denominations and serial numbers.

Review: Fair Treatment

- Additional or “Double” Compensation
- Using state position to seek private work or contracts
- Using state resources for private business purposes
- Financial transactions with subordinates

Conflicts



Conflicts of Interests

1. Disqualify yourself when there is a financial conflict (*applies to state employees*)
2. Don't create new conflicts (*applies to state employees*)
3. Don't represent (or assist) anyone ...
 - a) on a matter before your agency, or
 - b) on a matter that you worked on(*applies to legislators and employees*)

Carol is an investigator for the State Department of Consumer Complaints.

The Department is investigating a complaint against Volcano Eye Center for false advertising.

Carol's husband is an optometrist with Volcano Eye Center.

Can Carol investigate the complaint against Volcano Eye Center?



Conflicts of Interests

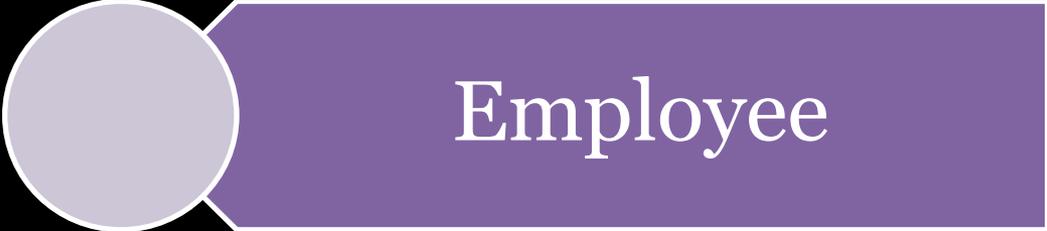
HRS § 84-14(a)

(Disqualification)

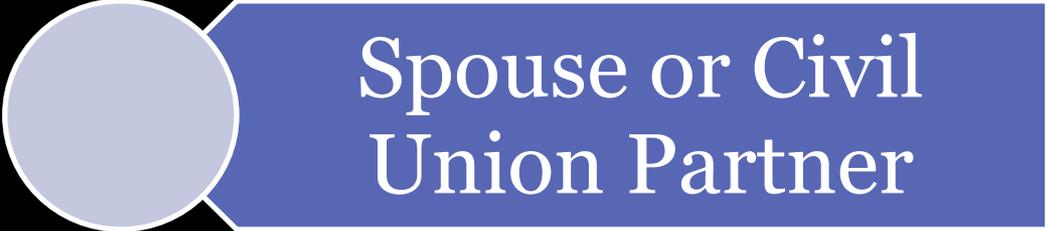
No employee shall take official action directly affecting a business in which the employee has a financial interest.



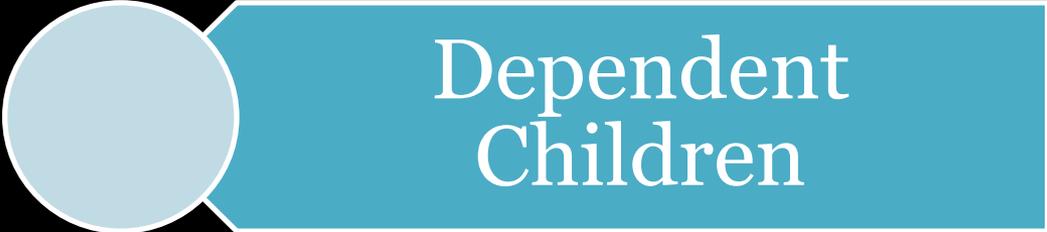
Whose Financial Interests?



Employee



Spouse or Civil
Union Partner



Dependent
Children

Official Action



Roger works for the State Department of Nature. The Forest Project, a private non-profit, would like Roger to become a volunteer member of its Board of Directors.

Can Roger accept this position with the Forest Project?



Conflicts of Interests

HRS § 84-14(b)

(New Financial Interest)

No employee shall acquire a financial interest in a business if there is reason to believe the employee will be taking official action involving that business.



Sherry works as a Department office clerk, and as a part-time sales manager for Malama Energy.

The Department plans to install energy efficient lights in all DOT facilities. Sherry offers to meet with the director about Malama Energy's products and services.

Can Sherry do this?



Conflicts of Interests

HRS § 84-14(d)

(Representation)

- No legislator or employee shall assist or represent another person or business for pay
- Before the employee's agency, or
- On a matter in which the employee has participated or will participate

Review: Conflicts of Interests

Disqualify
Yourself

No New
Conflicts

Don't
Represent
or Assist
Others

before own agency
or
on matters you
worked on

OTHER CONSIDERATIONS

- Voluntary Disqualification
- State Ethics Code is a Minimum Standard of Conduct; State Agency May Establish Stricter Policies

Financial Disclosures



Financial Disclosures

HRS § 84-17

- Who must file?
 - state elected officials
 - state board/commission members
 - state employees in certain positions (including “permanent employees of the legislature . . . other than persons employed in clerical, secretarial, or similar positions”)
- Purpose – to identify financial interests that may conflict with your state position

Contracts



Contracts

HRS § 84-15

Public notice required:

- Contract with state employee, legislator, or business controlled by state employee or legislator
- Not awarded by competitive sealed bid or proposal under HRS §103D-302, 303
- Contract is more than \$10,000

Prohibited if assisted or represented by agency employee or former employee who participated in contract matter within past 2 years

Post- Employment



Post Employment

HRS § 84-18



Purpose is to prevent:

- Influence peddling
- Revolving door

Post Employment

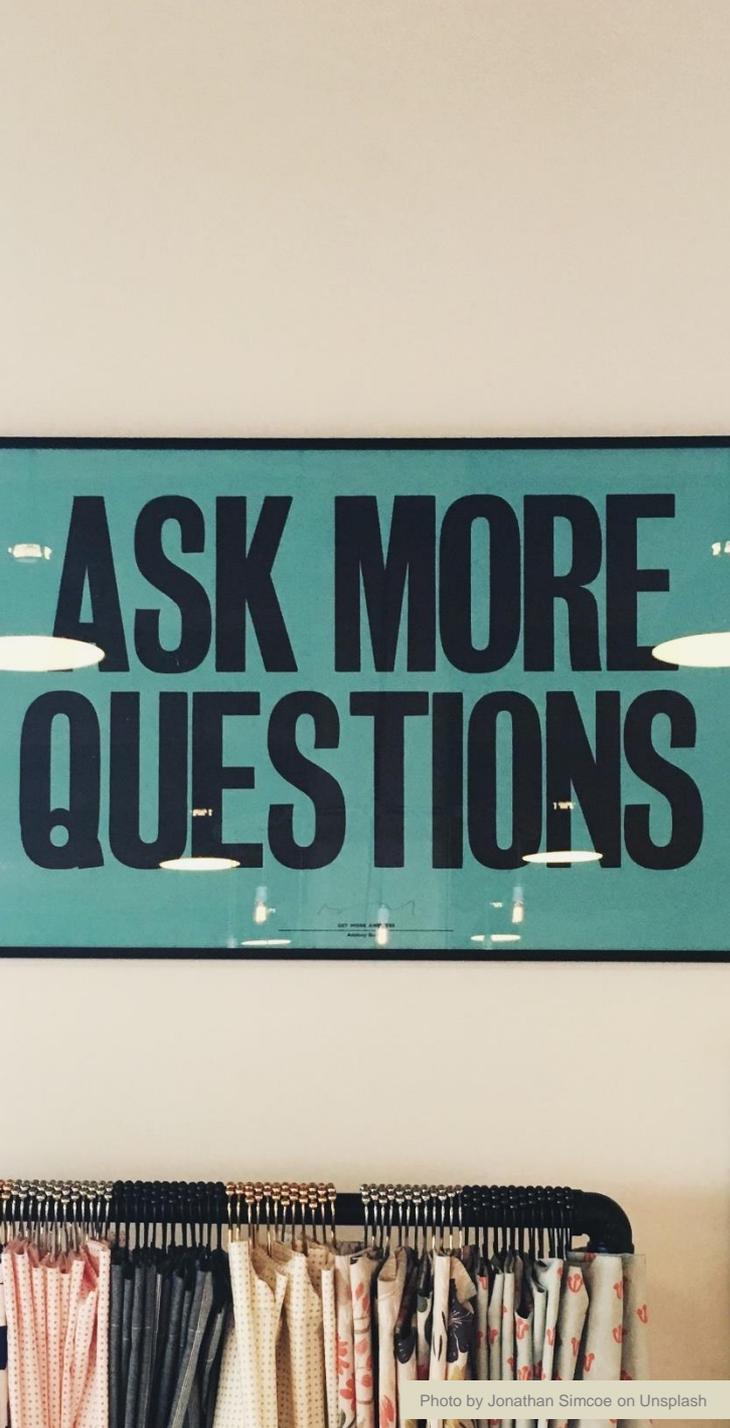
HRS § 84-18

- Confidential information – still applies
- 12 month “cooling off period”
- Cannot be paid to “represent” another person or business on:
 - matters in which you participated as a state employee, or
 - matters before your former agency
- “Represent” = direct communication
- Exceptions



Review

- ✓ Conflicts of Interests
- ✓ Gifts/Gifts Reporting
- ✓ Fair Treatment
- ✓ Confidential Information
- ✓ Contracts
- ✓ Financial Disclosures
- ✓ Post Employment



**ASK MORE
QUESTIONS**

Ethics Guidance

- Telephone/Email
- Staff Letter
- Advisory Opinion

All Advice is Confidential



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[Financial Disclosure Form](#)

[Gift Disclosure Form](#)

[Lobbying Forms](#)

[2019 Financial Disclosures](#)

[Public Documents System \(New EFile\)](#)

What's New

[Commission Issues Guidance Letter Regarding Solicitation of Support for Nominee](#)

Posted on May 28, 2019

[State Ethics Commission Resolves Charge Against Rodney C.Y. Chun, Former Member of the Board of Naturopathic Medicine, for Alleged Violation of Financial Disclosure Law](#)

Posted on May 17, 2019

[The High Road \(May 2019\): A State Office Is Not a Private Business; Public Resolutions of Ethics Investigations; Deadlines Reminders](#)

Posted on May 14, 2019

[May 16, 2019 Commission Meeting](#)

Posted on May 10, 2019

[State Ethics Commission Resolves Charge against Rowena Akana, Former Trustee, Office of Hawaiian Affairs, for Alleged Violations of Confidential Information Law](#)

Posted on April 30, 2019

Filing Deadlines

May 31, 2019

- Financial Disclosure Statements for State Officials
- Lobbying Expenditures and Contributions Reports for March 1-April 30, 2019

July 1, 2019

- Gifts Disclosure Statements

January 31, 2020

- Financial Disclosure Statements for State Legislators
- Lobbying Expenditures and Contributions Reports for May 1-December 31, 2019

[COMMISSION MEETING](#)

- [Agendas](#)
- [Public Materials](#)



"The people of Hawaii believe that public officers and employees must exhibit the highest standards of ethical conduct and that these standards come from the personal integrity of each individual in government."

— Hawaii State
Constitution
Article XIV

**Hawaii State
Ethics Commission**

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The High Road

The High Road is a publication of the Hawaii State Ethics Commission

Issue 2018-1

January 2018

Hawaii State Ethics Commission Celebrates 50th Anniversary!

In January of 1968, Hawaii established the first state ethics commission in the United States. This year, the Hawaii State Ethics Commission celebrates its 50th anniversary.

Hawaii's constitution reflects our state's commitment to government ethics and to the belief "that public officers and employees must exhibit the highest standards of ethical conduct." *State Constitution, Article XIV*. In furtherance of this, the constitution requires the adoption of a code of ethics for state officers and employees. This code of ethics is found in Hawaii Revised Statutes Chapter 84. The State Ethics Commission is responsible for administering the ethics code to promote ethical conduct and public confidence in state government.

Over the past fifty years, the Commission has provided ethics guidance to thousands of state officials, investigated and prosecuted violations of the ethics code, and administered financial disclosure laws that enhance transparency and accountability in state government. The Commission also has established a state-wide program to educate state officials about the ethics laws, and has advocated for the passage of laws to improve and strengthen Hawaii's ethics code.

The citizens of Hawaii established a strong foundation for state government by making the ethics code a constitutional requirement and establishing the first state ethics commission in the country. In our 50th anniversary year, we extend our sincere appreciation to the many individuals and organizations – state legislators and employees, good government organizations, and private citizens and other advocates for ethics – who have supported the Commission and its work to promote ethics and integrity in state government.



Contact Info

HAWAII STATE ETHICS COMMISSION

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Web: <http://ethics.hawaii.gov>

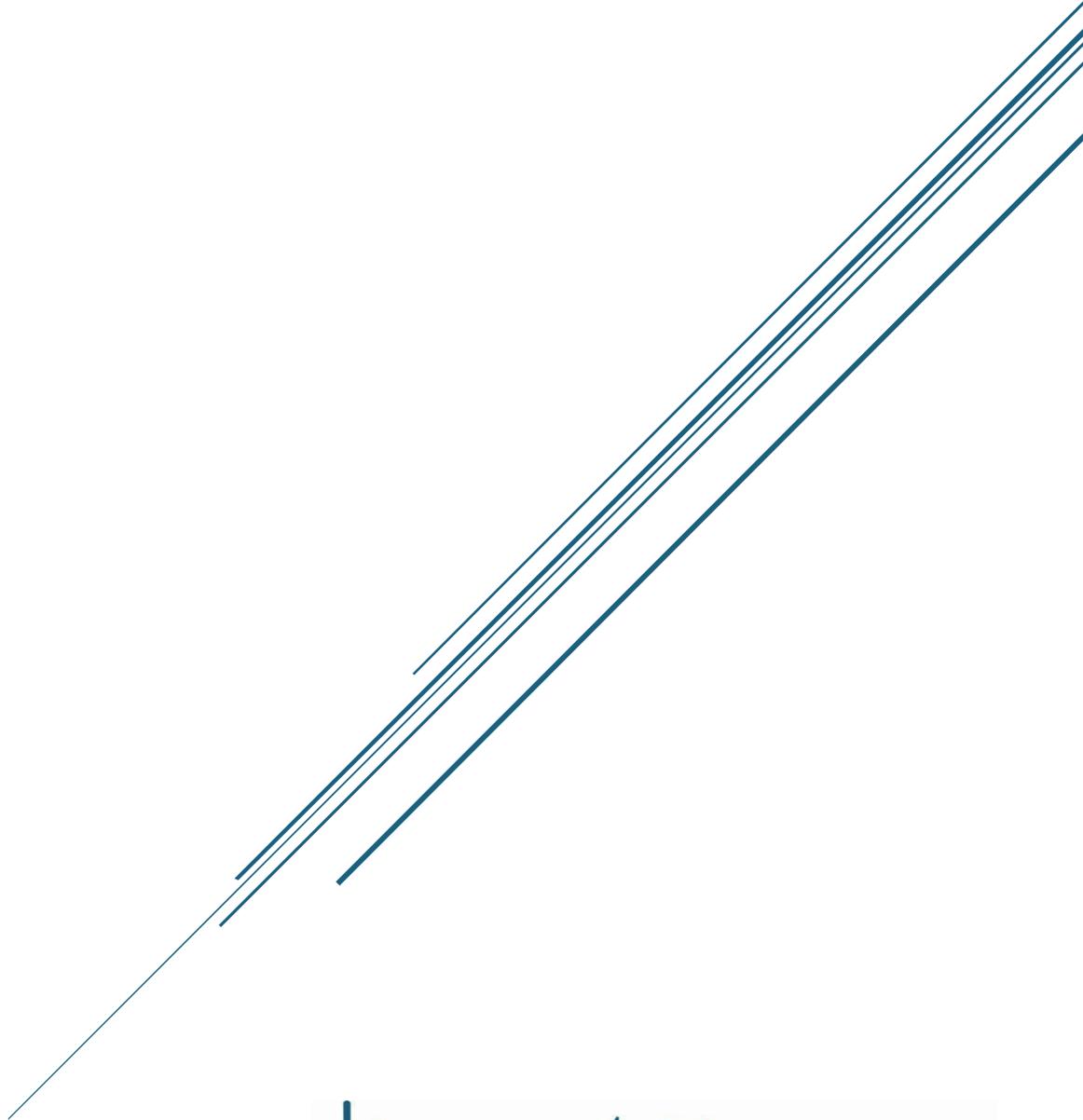
Twitter: @HawaiiEthics

6

Report of the Chief Executive Officer/Chief
Administrative Officer/Chief Brand Officer Relating to
Staff's Implementation of HTA's Programs During
June 2021

HTA CEO REPORT

JULY 2021



EXECUTIVE SUMMARY

Each month, the Hawai'i Tourism Authority (HTA) provides this report as a resource to the Board and the public to better understand the activities and actions taken by the team in support of the organization's overall mission. HTA's 2025 Tourism Strategic Plan and its four interacting pillars (Natural Resources, Hawaiian Culture, Community, and Brand Marketing) serves as a guide to the team in the various matters worked on during June 2021. Overall, this report provides insight into the actions conducted by the staff to implement the HTA budget previously approved by the Board.

Discussions with stakeholders and the State Department of Land and Natural Resources (DLNR) continue to include the implementation of a statewide reservations system for park access. HTA's natural resource team worked to identify best practices and examples of systems that epitomize the goals outlined in our strategic plan as well as the various Destination Management Action Plans (DMAP) that this system would help fulfill. Furthermore, the team continues to refine the scope of work for the study of enhancing tour guide certifications and licensure regimes for tour guides.

Work continues by the Hawaiian culture team on the Merrie Monarch Festival as well as final contract evaluations for 2020 Kūkulu Ola awardees. Staff also has under its care projects which include the Merrie Monarch Festival Digitization, 'Iolani Palace Repairs, Hawaiian Language Newspaper Digitization, Festival of Pacific Arts and Culture (FestPAC) and the Center for Hawaiian Music and Dance.

The O'ahu DMAP Steering Committee met in June to review the community feedback on their proposed actions, and to select the top 10 actions for inclusion in the O'ahu DMAP. Staff has also convened interagency meetings with a variety of entities to work on addressing Hawai'i Island and Maui DMAP actions. Staff has also been drafting contracts to encumber the additional funds from the Tourism Special Fund for its Community Enrichment Program, Signature Events, and DMAPs.

The brand team has been drafting the Request for Proposals (RFP) for Hawai'i Tourism Destination Brand Marketing Services in the USA Major Market Area (MMA) and the 2022 Brand Marketing Plan (BMP) Outlines for all global MMAs. The team aims to release the RFP and BMP Outlines in August.

Pursuant to the HTA leadership team's instructions, the brand team expedited the procurement and contract execution for the Japan, Canada, Oceania, Korea, and China MMAs for Hawai'i Tourism Destination Brand Marketing Services in 2022 using fiscal year 2021 funds under HTA's procurement exemption. A contract was also executed for Island Chapters Support Services for 2022 using fiscal year 2021 funds.

In the month of June, three hospitality industry updates were conducted for the County of Maui, City and County of Honolulu, and County of Kaua'i on June 8, 9, and 18, respectively.

HTA's Tourism Research Division (TRD) published the May 2021 Visitor Statistics press release and monthly reports, air seat outlook for July – September 2021, May 2021 Hawai'i Hotel Report, and May 2021 Vacation Rental Performance Report. The interactive Symphony Dashboards are now live on a new dedicated page on the HTA website. In addition, TRD published weekly Destination Brand Index reports, the weekly Destination Brand Index – Responsible Traveler Segment, weekly Travel Agency Booking Trend reports, and the May 2021 Coronavirus Impact Report.

I. NATURAL RESOURCES PILLAR

1. Aloha 'Āina (Natural Resources) Program

HTA program staff continue to finalize contract closeout evaluations from Aloha 'Āina programs. There are 34 projects that have concluded the 2020 cycle despite the rough year. Most projects were completed at the end of calendar year 2020. However, a few were granted no-cost extensions. Staff have struggled with securing compliant CVCs from contractors which delayed final payment processing and contract closeouts.

2. DLNR Partnership

Nā Ala Hele staff continue to implement various portions of the project to enhance the resident and visitor experience statewide across 128 trails spanning approximately 855 miles. This is a FY 2020 project that is expected to conclude at the end of 2021. HTA staff continue to work with the Department of Land and Natural Resources (DLNR) leadership and interim Nā Ala Hele program manager, Bill Stormont. HTA cancelled MOA 20172 S2 – Alaka'i Boardwalk because DLNR was unable to implement the project even after being granted no-cost extensions. The MOA was originally signed in December 2019. With extensions, work was to be completed by April 30, 2021. All funds awarded (\$59,000) will be returned to HTA.

3. Park Reservation and User Fee Program

HTA staff have continued to hold meetings with the DLNR, representatives of the Office of the Governor and others to understand the opportunity to implement a state parks reservation system. Through these discussions the team learned that there is a desire to have other assets included in the system beyond just state parks, that could include state trails, county parks and other prominent points of interest. DLNR has paused the rollout of their system until the opportunity is identified and an agreement is reached. It is becoming apparent that a site may need to be built that focuses on the user experience and education that links to existing systems on the back end. There is more work to come.

4. Tour Guide Certification and Licensure

HTA staff has revisited the work plan for this project and is in the process of reevaluating its merit at this time. In partnership with the University of Hawai'i (UH) at Mānoa School of Travel Industry Management (TIM) the team plans to study what is currently on the books and what exists, for a better understanding of what other jurisdictions are doing as best practices. The HTA team believes there is an opportunity to study this now for implementation in future years. Staff anticipates having a final report by the end of calendar year 2021. Due to the delays in negotiating the agreement, shifting budget and other factors beyond HTA's control, the team will be moving this project to the Native Hawaiian Hospitality Association (NaHHA) for implementation as a part of their CY22 contract which is funded from FY21.

II. HAWAIIAN CULTURE PILLAR

1. Kūkulu Ola Program

HTA program staff continue to finalize contract closeout evaluations from Kūkulu Ola programs. There are 33 projects that have concluded the 2020 cycle despite the rough year. Most projects were completed at the end of calendar year 2020. However, a few were granted no-cost extensions. Similar CVC issues for these contractors have also delayed final payments and final contract closeouts.

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. NaHHA continues to support HTA staff with Festival of Pacific Arts and Culture (FestPAC) planning and coordination.

NaHHA also held its first virtual gatherings of Ka Huina in May and June. Due to the pandemic, Ka Huina was held virtually as four half-day events over several weeks. The series focuses on Community, Culture, Regenerative Tourism, and Sustainability. Preliminary numbers indicate great attendance for the virtual series, with 628 total live viewers and 507 total Facebook viewers. Playback numbers will continue to increase as more people view the sessions in the weeks ahead.

HTA staff have also concluded conversations with NaHHA on a new expanded scope of work that responds better to current realities in the industry. Supplemental 3 to CON18200 has been finalized and executed.

3. Native Hawaiian Festivals and Events

13TH FESTIVAL OF PACIFIC ARTS AND CULTURE (FESTPAC)

The commission for the 13th FestPAC continues its planning and HTA staff are supporting efforts around marketing, public relations, and communications for the festival. The festival commission is now focused on the development of the programming schedule of practices to be offered as part of the festival. Further, the commission monitored SB 696 SD1 HD1 which is needed to extend the life of the commission through August 31, 2025. The bill is now with Governor Ige for his signature. The Governor also announced the appointment of Maenette Ah Nee-Benham to fill the vacancy on the commission after the resignation of Commissioner Monte McComber.

MERRIE MONARCH FESTIVAL AND DIGITIZATION PROJECT

Event organizers successfully filmed and produced this year's Merrie Monarch Festival, which was privately held in Hilo, Hawai'i in June. The broadcast will be aired to the public during the first week of July.

The digitization work is ongoing and expected to be completed by June 2022. The work of digitizing the archived collection has been slowed due to the COVID-19 restrictions as well as the tedious nature of the work.

4. Center for Hawaiian Music and Dance

During the 2021 legislative session, HTA tracked several bills which would affect the Center for Hawaiian Music and Dance (CHMD). HB321 HD1 and SB926 repeal the allocation of TAT funds to the CHMD. HB1165 and SB916 SD1 amend the language that allowed for the development and operations of the Center for Hawaiian Music and Dance and leaves its location undetermined. HTA staff has paused exploration of a digital/virtual exhibit component to begin with, as clarity is obtained on what will allow the state to meet the challenges faced with the economic recovery from COVID-19.

5. 'Ōlelo Hawai'i – He Aupuni Palapala: Preserving and Digitizing the Hawaiian Language Newspapers

In response to COVID-19 and the various county and state restrictions, HTA staff have finalized a supplemental contract with Bishop Museum that allows more time for work to be completed on “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. HTA staff were also informed that the scanner, a critical missing tool, needed to advance this work has been ordered. Bishop Museum staff and partner organizations have begun indexing the collections across repositories. Lastly, the project received some positive coverage in local media recently as well.

6. 'Iolani Palace Repairs

Work for this project began in August 2020. As of June 2021, all expected outcomes have been successfully reached. According to the contractor, all of those who were involved with the project were committed to quality work. The concrete spalling in the Coronation Pavilion was much worse than originally anticipated, and that led to the project going nearly \$42,000 over budget (which included a \$15,000 contingency fee). Despite the work being behind due to the pandemic and materials damaged in transit, which needed to be reordered and reshipped, the goals of the project were met and the emergency repairs to 'Iolani Palace and the Coronation Pavilion were completed.

III. COMMUNITY PILLAR

1. Community

COMMUNITY-BASED TOURISM PROGRAM – DESTINATION MANAGEMENT ACTION PLANS (DMAPS)

Below is an update on activities undertaken to support the implementation of the various DMAPs.

Kaua'i DMAP

- Staff worked on contracting with the County of Kaua'i for a *Kaua'i Made* focused affiliate membership retail and networking space that will service local small businesses with a focus on Kauai Made products.
- HTA provided support toward the County of Kaua'i's efforts in changing modes of transportation as well as educating and marketing alternative modes to move visitors throughout the island.

Maui DMAP

- Staff convened meetings with the County of Maui, Maui Visitors and Convention Bureau, and DOT-Airports to assess the possibility of a shuttle service from the airport to resort areas. The meetings resulted in a new shuttle service from Kahului Airport to the resort areas in South and West Maui that will begin on July 3 and run through July 17.
- Staff has been working on coordinating near-term actions to mitigate visitor impact to Hāna. For example, staff provided input to DOT-Highways' educational flyers for use by car rental agencies and posters at Maui's Consolidated Rental Car or "ConRAC" facility at Kahului Airport.
- Staff has also been working with Senator Lynn DeCoite, Department of Business, Economic Development and Tourism (DBEDT), and DOT to address Hāna as well. A virtual town hall meeting is scheduled for July.

Hawai'i Island DMAP

- Staff worked on contracting with KUPU to hire four part-time stewards as a part of a pilot stewardship program to mitigate impacts at Pololū Valley trail, which is an identified DMAP hotspot. This is a partnership with KUPU and DLNR's Division of Forestry and Wildlife's Nā Ala Hele Trail and Access Program. HTA also worked with the County of Hawai'i and Island of Hawai'i Visitors Bureau to review the proposed program and obtain their feedback. The part-time stewards will provide education, prevent unwanted behavior, and ensure safety of users to the area. The pilot program will run from August 2021 to January 2022.

O'ahu Steering Committee

- The O'ahu Steering Committee met on June 10 to review the community feedback from the May Community Presentations and comments from the online input form. The committee selected

the top 10 anchor actions for the O'ahu DMAP. At the next meeting in July, the Committee will review the final draft actions.

COMMUNITY ENRICHMENT PROGRAM (CEP)

HTA staff continues to work with the remaining 2020 CEP contractors to obtain final deliverables and close out 2020 contracts.

HOSPITALITY INDUSTRY UPDATES (COUNTY)

HTA recognized the need to connect stakeholders from both the public and private sectors to improve awareness and build an understanding of the current state of the visitor industry related to COVID-19. As such, HTA staff coordinates with each county to identify a day and time that is most convenient for the respective mayor to participate in a hosted meeting with government officials, association leaders, contract partners and the visitor industry.

In the month of June, three hospitality industry updates were conducted for the County of Maui, City and County of Honolulu, and County of Kaua'i on June 8, 9, and 18, respectively.

2. Communication and Outreach

NEWS RELEASES/REPORTS/ANNOUNCEMENTS

- News Release: HTA Launches Educational Mālama Hawai'i Campaign (June 1)
- News Release: HTA Launches Interactive Data Page (June 10)
- Report: HTA Hawai'i Hotel Performance Report for May 2021 (June 21)
- Report: HTA Hawai'i Vacation Rental Performance Report for May 2021 (June 24)
- News Release: HTA Releases Results from 2021 Resident Sentiment Survey (June 24)
- News Release: HTA Releases Results from Visitor COVID-19 Study (June 28)
- News Release: Hawai'i Visitor Statistics Released for May 2021 (June 29)

NEWS BUREAU

- Interviews
 - Kalani Ka'anā'anā interviewed on Hawai'i News Now's HINow regarding HTA's support of the Merrie Monarch Festival (June 25)
- Local and national media relations
 - Tom George, KITV: Provided information on Mālama Hawai'i and Kuleana videos for story on educating visitors in light of recent hiking and ocean safety issues
 - Jen Murphy, Freelancer: Provided information on air seats and schedules into Hawai'i
 - Mindy Pennybacker, Honolulu Star-Advertiser: Forwarded to George Kam reporter's interview request on the state's draft EIS for Waikiki beach improvements
 - Yostina Banoub, KITV: Declined request for interview on car rental shortage due to unavailability

- Allison Schaefer, Honolulu Star-Advertiser: Declined comment regarding Gov. Ige's announcement of his intent to veto HB862
- Sam Spangler, KHON: Declined comment regarding Gov. Ige's announcement of his intent to veto HB862

COMMUNITY INITIATIVES AND PUBLIC OUTREACH

- HTA E-Bulletin: Finalized and distributed the new monthly HTA e-bulletin, which launched on June 21 in English and 'Ōlelo Hawai'i
- Car Rental Shortage:
 - Distributed Announcement: Update on Rental Car Shortage (June 8)
 - Drafted and coordinated information with the counties, as well as copy for HTA website with links to alternate ground transportation options
 - HVCB also amplified message to its membership, media/partner, and travel trade lists
 - JDF participated in Zoom interview with Michelle Tak, The Today Show
- Ka Huina: Drafted and distributed e-blasts via Constant Contact on Ka Huina's Tourism and Sustainability sessions presented by the Native Hawaiian Hospitality Association in partnership with HTA
- Maui ALOHA Shuttle: Drafted news release in partnership with Maui Visitors and Convention Bureau
- Hāna Highway Mitigation Efforts
 - Drafted news release and copy for HTA website urging travelers to experience the road to Hāna via a guided tour or visit other areas of Maui
 - Reviewed and provided feedback to DOT's Maui flyer and Consolidated Rent-A-Car (ConRAC) poster
- State Communications Support
 - Drafted and provided messaging from HTA and HVCB on American Association of Orthodontists' cancellation to Gov. Ige's office
 - Drafted and provided messaging on destination management efforts surrounding increase in summer tourism to Gov. Ige's office

CRISIS COMMUNICATIONS

- Conducted updates to HTA's website – COVID-19 alerts page

HTA'S SOCIAL MEDIA

Paid Posts on Facebook

- Post on the Mālama Hawai'i campaign. Flight dates from June 2-9. Total Reach 39,434 | Total Engagements 3,383
- Post on John De Fries' Huliau speech. Flight dates from June 8-15. Total Reach 16,469 | Total Engagements 861
- Post on ground transportation options for travelers. Flight dates from June 17-24. Total Reach 48,420 | Total Engagements 8,802

- Post on HTA's June E-Bulletin. Flight dates from June 23-30. Total Reach 19,246 | Total Engagements 5,154

Facebook

- Number of followers: 18,442 (+27.09%)
- Engagement rate: +553.97%
- Daily page engaged users: 34,154
- Posts: 24

Instagram

- Number of followers: 4,606 (+40.30%)
- Engagement rate: +567.74%
- Number of engagements: 182
- Posts: 3

Twitter

- Number of followers: 37,515 (+1.69%)
- Engagement rate: +308.33%
- Number of engagements: 16
- Posts: 3

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 (S6) – Visitor Aloha Society of Hawai'i (O'ahu) was issued a contract on December 30, 2020, Supplemental #6, which encumbered funds for three-fourths of calendar year 2021 in the amount of \$277,500 (April 1, 2021 to December 31, 2021). HTA has processed a contract extension to fund this program from January 1, 2022 to December 31, 2022.
- CON 17032 (S5) – VASHI – Island of Hawai'i VAP was issued a contract on December 30, 2020, Supplemental #5, which encumbered funds for three-fourths of calendar year 2021 in the amount of \$127,500 (April 1, 2021 to December 31, 2021). HTA has processed a contract extension to fund this program from January 1, 2022 to December 31, 2022.
- CON 17033 (S4) – VASK – Kaua'i VAP was issued a contract on December 30, 2020, Supplemental #6, which encumbered funds for three-fourths of calendar year 2021 in the amount of \$41,250

(April 1, 2021 to December 31, 2021). HTA has processed a contract extension to fund this program from January 1, 2022 to December 31, 2022.

- CON 17034 (S4) – MVCB – Maui VAP was issued a contract on December 30, 2020, Supplemental #6, which encumbered funds for three-fourths of calendar year 2021 in the amount of \$41,250 (April 1, 2021 to December 31, 2021). HTA has processed a contract extension to fund this program from January 1, 2022 to December 31, 2022.

During the month of June:

- Maui County's program handled 15 cases and helped 26 visitors (year-to-date: 63 cases/ 102 visitors). This included visitors primarily from the U.S. West, U.S. East, and Japan markets. The program team also attended meetings at the EOC, Police Commission, Airport, VOAD and car rental committee meetings. The industry assisted with \$4,400 of in-kind contributions.
- Hawai'i County's program handled 23 cases and provided assistance to 64 visitors (year-to-date: 114 cases/ 303 visitors). This included visitors primarily from the U.S. West market, the United Kingdom and South Korea.
- City and County of Honolulu's program handled 63 cases and helped 148 visitors (year-to-date: 365 cases/ 960 visitors). This included visitors from California, Washington, and other areas of the United States.
- Kaua'i County's program handled 7 cases and provided assistance to 19 visitors (year-to-date: 43 cases/ 112 visitors). All of the visitors assisted were from the U.S. East/West markets.

SNORKEL SAFETY STUDY

The HTA executed a contract with the Hawaiian Lifeguard Association (CON 19171) for \$131,000 to conduct a snorkel safety study. This two-year study was designed to assess the causes and risk factors in snorkel-related fatalities and near fatal drownings. Hawaiian Lifeguard Association (HLA) collected and analyzed data, conducted scientific research, conducted surveys and interviews, and consulted with experts in the appropriate fields. The State of Hawai'i Department of Health and the City and County of Honolulu lifeguards collaborated on the study as well. A final report was received from the HLA and will be published on HTA's website.

IV. BRAND MARKETING PILLAR

1. Major Market Area (MMA) Market Conditions

International MMA Border/Entry Restrictions

- Canada and Korea issued new guidelines to allow fully vaccinated citizens, permanent residents, and certain foreign nationals to avoid mandatory quarantine upon arrival. Travelers must provide a negative COVID-19 test 72 hours before arrival and are required to take a second test after arrival.
- The borders of Japan, Australia and New Zealand are still closed for non-essential travel with a 14-day mandatory quarantine upon arrival in place. The Japan government announced the fourth state of emergency for Tokyo effective through August 22, 2021. This period will cover the duration of the Tokyo Olympics with a goal to curb the movement of people during this global event as well as the summer vacation period including Obon holidays.

USA Travel Sentiment

- Three-quarters of American travelers will take at least one vacation or getaway over the next three months, while 15.3% will take a business trip and 7.5% will travel for a conference or convention. That's according to Destination Analysts' "COVID Tracker - Vaccination Status of U.S. Travelers" study which shows a growing confidence in travel as more Americans get vaccinated and travel restrictions continue to be relaxed making traversing the country more accessible.

MMA Airlift Update

- USA: The forecast for domestic scheduled nonstop air seats to Hawai'i for July – September 2021 will increase by +28.1 percent as compared with the same time period in 2019. The projection is based on flights appearing in Diio Mi airline schedules. Due to COVID-19, the constant fluidity in scheduled air seats is expected to continue for U.S. West (+27.8%) and U.S. East (+30.5%).
- Canada: WestJet will significantly grow its Hawai'i network featuring more Dreamliner flight options from Western Canada to Maui and new nonstop service from Calgary to Kona and Līhu'e this winter. WestJet currently offers 57 weekly roundtrip flights on 10 nonstop routes between Canada and the Hawaiian Islands.
- Japan: ZIPAIR will resume its flights on July 21. All Nippon Airways will add two Flying Honu aircraft on August 9 and August 13, respectively.
- Korea: Korean Air and Asiana Airlines will operate two charter flights each from Incheon to Honolulu during Chuseok, Lunar Thanksgiving, in September 2021. Hawaiian Airlines currently operates two weekly flights (HA 460) from ICN to HNL, every Friday and Sunday, and is planning to increase the frequency to three times a week starting August 1.

2. MMA Contract Status

- USA: The current contract for the USA MMA ends on December 31, 2021 with no options to extend. Staff is working on a draft RFP for the USA MMA for 2022 and intends to release the RFP in August. This new RFP may include Leisure, MCI, and Support Services (website development and maintenance, content development, social media, and digital asset library management).
- Japan: The current contract for the Japan MMA ends on December 31, 2021 with no options to extend. Staff has expedited and competed procurement and contract execution for a new one-year contract covering calendar year 2022 using fiscal year 2021 funds under HTA's procurement exemption. Through June, HTJ was on a fixed-cost payment schedule.
- Canada: The current contract for the Canada MMA ends on December 31, 2021 with no options to extend. Staff has expedited and competed procurement and contract execution for a new one-year contract covering calendar year 2022 using fiscal year 2021 funds under HTA's procurement exemption. Through June, HTCAN was on a fixed-cost payment schedule.
- Oceania: The current contract for the Oceania MMA ends on December 31, 2023 with two one-year options to extend. Staff has expedited and competed procurement and contract execution for a supplemental contract covering calendar year 2022 using fiscal year 2021 funds under HTA's procurement exemption. Through June, HTO was on a fixed-cost payment schedule.
- Korea: The current contract for the Korea MMA ends on December 31, 2022 with two one-year options to extend. Staff has expedited and competed procurement and contract execution for a supplemental contract covering calendar year 2022 using fiscal year 2021 funds under HTA's procurement exemption. Through June, HTK was on a fixed-cost payment schedule.
- China: Due to the COVID-19 pandemic and through no fault of the contractor, the contract for China MMA was terminated on December 31, 2020. Staff has expedited and competed procurement and contract execution for a new one-year contract covering calendar year 2022 using fiscal year 2021 funds under HTA's procurement exemption.

3. 2022 MMA RFP and BMP Outlines

The brand team has been working with HTA's contract specialist to develop a new RFP for Hawai'i Tourism Destination Brand Marketing Services in the USA MMA for 2022. Concurrently, the team is updating the Brand Marketing Plan Outlines for 2022. Both the RFP and BMP Outlines feature added emphasis of industry collaboration and market education on Mālama Hawai'i and regenerative tourism including the promotion of local businesses and Hawai'i Made products. The RFP and BMP key performance indicators and other program measures are being re-examined for improved alignment with the updated key brand marketing objectives.

4. *MMA Brand Marketing Highlights*

All Global Marketing Team (GMT) members have been directed to pivot towards visitor and industry education, and focus brand marketing to attract high-spending, positive-impact prospects with programs aligned with responsible and regenerative tourism.

- USA: Visitors headed to the Hawaiian Islands are being educated about being mindful travelers through a media campaign supporting the Mālama Hawai'i program that was launched in May and continued through June. The campaign, which features island ambassadors sharing their personal stories about the importance of taking care of the 'āina (land) and kai (ocean), is currently running on digital and social media platforms, including Facebook and Instagram, and has already amassed more than 22 million impressions through the first week of July.
- Japan: In June, news stories about Hawai'i's vaccination progress, regenerative tourism, and local organizations aired on nine television programs, including TV Tokyo and Yomiuri TV. Additionally, Hawai'i Tourism Japan (HTJ) secured interviews for HTA's President and CEO John De Fries on TV Asahi, and for HTJ Country Director Mitsue Varley on NHK's Chikyu Radio. Both spoke to the Mālama Hawai'i initiatives and regenerative tourism.
- Canada: Hawai'i Tourism Canada has been focusing on promoting the air seats Air Canada added to Hawai'i for the next winter season. With the news of reopening the borders and the easing of travel restrictions, together with the high interest in the destination from different submarkets, Air Canada has added three new routes: Montreal-Honolulu and Toronto-Maui as long haul; and Calgary-Kona in the mid-range flights. The airline is also restarting flights from Vancouver-Honolulu and Vancouver-Maui in September and Vancouver-Kona in December.
- Oceania: While travel from Oceania to Hawai'i is still restricted due to the pandemic, Hawai'i Tourism Oceania continues to keep its 150,000+ social media audience engaged and dreaming of the islands of aloha. Imagery and messaging that showcases nature, outdoor spaces, beauty and culture helps keep Hawai'i at the top of the aspiration list for Aussies and Kiwis to visit when the borders reopen.
- Korea: Hawai'i Tourism Korea (HTK) successfully held its second Aloha Specialist University educational seminar on June 30 and invited key industry partners including travel agencies, airlines, and trade media. The one-hour program covered current COVID-19 updates on the Hawaiian Islands, the TTP program and Safe Travels information, and the Mālama Hawai'i campaign. During the training, HTK also provided the newly updated Mālama Hawai'i videos and information on voluntourism activities in Hawai'i.

5. *Collaborations and Communications*

- HTA staff continues to communicate with its industry partners to exchange information on market and business development.
- The brand team continues to conduct teleconference meetings with the GMT to obtain regular updates on market trends, marketing activities, Hawai'i messaging, airlift development, and visitor and industry education efforts. During these meetings, HTA also conducts financial reviews.
- HTA staff participated in the HTK and O'ahu Visitors Bureau meeting held on June 2 to share market updates and partnership opportunities.
- The brand team, HVCB, and Department of Agriculture met on June 15 to have further discussion on ways to collaborate regarding promoting local farms and businesses and related products.
- HTA staff, DBEDT Business Development & Support Division, DBEDT Beijing Office, and DBEDT Taipei Office met on June 10, 23, 28 with discussions centered on keeping Hawai'i present on social media in China and Taiwan, developing a possible "travel bubble" between Taiwan and Hawai'i, promoting Hawai'i Made products and Hawai'i based school programs, and warming up the China market with an educational webinar in the fourth quarter of this year.
- HTA staff met with Gary Yamashiroya, special assistant to the Attorney General, to discuss the addition of Incheon Airport Test Center to the Hawai'i TTP program for the Korea market.
- HTA staff attended meetings for island-specific MCI updates on June 15 for O'ahu and Kaua'i, and June 25 for Maui.
- Access Cruise, Inc., HTA's cruise consultant, continues to communicate with Hawai'i's cruise industry stakeholders and provide weekly updates on the national and international cruise industry. It appears cruises ships will return to Hawai'i in November.

V. TOURISM RESEARCH

The Tourism Research Division (TRD) issued the May 2021 monthly visitor statistics on June 29, 2021, 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 July through September 2021 to the Infrastructure Research Section of the HTA website. This report also includes flight information. Updates to air seat schedules were also published during the month.

State, market, and island fact sheets were updated with the May 2021 data and were published on the Monthly Visitor Statistics page of the HTA website.

TRD issued the May 2021 Hawai'i Hotel Performance Report on June 21, 2021. The report and related May 2021 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.

TRD issued the May 2021 Hawai'i Vacation Rental Performance Report on June 24, 2021. The report and related May 2021 data tables were posted to the Infrastructure Research section of the HTA website. This report utilizes data compiled by Transparent Intelligence, Inc.

The results of the Spring 2021 Resident Sentiment Survey were presented to the HTA Board on June 24, 2021 by Chris Kam of OmniTrak Group, the current vendor for this project. The presentation to the board was posted on the HTA website.

The results of the June 2021 Special Visitor COVID-19 Study were presented to the HTA Board on June 24, 2021 by David Pettinger of Anthology Research. This special survey is part of the contract for the Visitor Satisfaction and Activity Study. The presentation to the Board was posted on the HTA website on the Visitor Satisfaction and Activity page.

The HTA Symphony Dashboards are now live and interactive on a newly created page on HTA's website. The Symphony Dashboards incorporate HTA's visitor statistics, Tourism Economic's tourism and economic data, UberMedia's geolocation data, lodging data from STR (hotel), Transparent, Inc (vacation rental), and HTA's Quarterly Timeshare Survey. TRD will continue to enhance and expand these dashboards.

TRD published the June 2021 YouGov Coronavirus Travel Sentiment report prepared by HVCB. This report focuses on the impact of COVID-19 on U.S. Avid Travelers and provide travel planning trends, attitudes, and demographics. TRD continued publishing the weekly Hawai'i YouGov Destination Brand Index for U.S., Japan, and Canada and the weekly Responsible Traveler Segment for the U.S. The report currently

features the U.S. market and presents trends on a by-island basis. Other markets will be added as data becomes available. These reports are posted on the Other Research Section of the HTA website. These reports utilize data from YouGov's Brand Index.

TRD continued publishing weekly Travel Agency Booking Trend reports which features forward-looking data for the U.S., Japan, Canada, and Australia from Global Agency Pro. These reports are posted on the Other Research Section of the HTA website.

TRD is assisting with the mandatory 10-day quarantine, including attending HI-EMA operational calls, posting of daily transpacific passenger arrival data derived from data provided through the Office of Enterprise Technology Service's Safe Travels Program, and supporting state and county law enforcement and prosecutors. HTA also supports the Safe Travels Program by providing air service schedules.

Jennifer Chun hosted the PATA Hawai'i webinar on Hot Topics in Food and Beverage on June 25. The webinar was moderated by Josette Murai of the Hawai'i Visitors and Convention Bureau. Chun is also the chair of the Pacific Asia Travel Association (PATA) Hawai'i Chapter, and is a member of the PATA international board.

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 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 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: Pursuant to Hawai'i Revised Statutes §201B-7 (9), please find the following contracts executed during the month of June 2021:

June 2021						
Contract No.	Contractor	Description	Contract Amount	Total Contract Value	Start Date	End Date
14002 S12	AEG Management HCC, LLC dba Hawai'i Convention Center	Hawai'i Convention Center	\$40,628,568.00	\$191,554,674.18	6/29/2021	6/30/2023
†21038	Hawai'i Visitors and Convention Bureau	CEP & DMAP Implementation & Communications for Kaua'i, Oahu, Maui Nui, and Hawai'i Island	\$9,409,112.00	\$9,409,112.00	6/28/2021	5/31/2023
†21028	a.link LLC	Japan MMA Marketing Management Services	\$9,000,000.00	\$9,000,000.00	6/16/2021	12/31/2022
•21033	Hawai'i Community Foundation	HTA x HCF Implementation of Kūkulu Ola & Aloha 'Āina Programs	\$3,500,000.00	\$3,500,000.00	6/22/2021	1/31/2023
†21030	Hawai'i Visitors and Convention Bureau	Island Chapters Support Services	\$2,400,000.00	\$2,400,000.00	6/23/2021	12/31/2022
21019 S2	The Walshe Group Pty Ltd dba Hawai'i Tourism Oceania	Hawai'i Tourism Inbound Destination Marketing Management Services in the Oceania Major Market Area	\$1,900,000.00	\$2,300,000.00	6/16/2021	12/31/2023
18200 S3	Native Hawaiian Hospitality Association dba NaHHA	Native Hawaiian Hospitality Association (NaHHA) 2021-2022 Work Plan	\$1,849,530.00	\$3,189,530.00	6/18/2021	3/31/2023

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†21031	ITRAVLOCAL Limited	China MMA Marketing Management Services	\$1,800,000.00	\$1,800,000.00	6/21/2021	12/31/2022
20007 S4	AVIAREPS Marketing Garden Holdings Ltd.	Destination Marketing Management Services for Korea MMA	\$1,400,000.00	\$2,204,000.00	6/15/2021	12/31/2022
†21029	VoX International Inc.	Canada MMA Marketing Management Services	\$800,000.00	\$800,000.00	6/17/2021	12/31/2022
†MOA 21039	Department of Transportation - Airport Division	Kāheea Airport Greetings	\$534,828.00	\$534,828.00	6/25/2021	9/30/2021
†21040	Visitor Aloha Society of Hawai'i	Visitor Assistance Program - O'ahu 2022	\$370,000.00	\$370,000.00	6/28/2021	12/31/2022
17028 S12	a.link LLC	Japan MMA Marketing Management Services	\$251,680.00	\$38,467,000.79	6/3/2021	12/31/2021
20010 S4	Anthology Marketing Group, Inc	Public Relations, Communications, and Outreach Services	\$200,000.00	\$502,000.00	6/28/2021	12/31/2022
†MOA 21025	County of Kaua'i Office of Economic Development	Kaua'i DMAP 2021: Transportation Change and Kaua'i Made Support	\$192,000.00	\$192,000.00	6/29/2021	12/31/2021
†21041	VASH Hawai'i Island	Visitor Assistance Program - Island of Hawai'i 2022	\$170,000.00	\$170,000.00	6/25/2021	12/31/2022
•21026	Council for Native Hawaiian Advancement	Pop Up Mākeke Season 3	\$100,000.00	\$100,000.00	6/17/2021	12/31/2022
†21044	Hawai'i Visitors and Convention Bureau	HTA - University of Hawai'i Athletics Partnership	\$100,000.00	\$100,000.00	6/28/2021	12/31/2021
21026 S1	Council for Native Hawaiian Advancement	Pop Up Mākeke Season 3	\$99,995.00	\$199,995.00	6/29/2021	12/31/2022

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†21032	Kupu	Pololū Trail Steward	\$92,314.00	\$92,314.00	6/21/2021	3/31/2022
†21027	ES&A, Inc., A Law Corporation	HTA Reorganization Assistance	\$80,000.00	\$80,000.00	6/9/2021	1/31/2022
†21042	Visitor Aloha Society of Kauaʻi, Inc.	Visitor Assistance Program - Kauaʻi 2022	\$55,000.00	\$55,000.00	6/29/2021	12/31/2022
†21043	Maui County Visitors Association dba Maui Visitors Bureau	Visitor Assistance Program - Maui 2022	\$55,000.00	\$55,000.00	6/28/2021	12/31/2022
21014 S1	OmniTrak Group Inc	Cruise Visitors' Basic Characteristics and Expenditures Survey for Calendar Years 2021-2023	\$54,963.00	\$230,012.00	6/29/2021	6/30/2024
20191 S2	University of Hawaiʻi	Hawaiʻi AgTourism Initiative	\$50,920.00	\$144,159.00	6/8/2021	6/30/2022
•PON 21034	Hawaiʻi Ecotourism Association dba Sustainable Tourism Association of Hawaiʻi	Sustainable Tourism Management in Hawaiʻi through Certification, Trainings & Partnerships	\$50,000.00	\$50,000.00	6/21/2021	6/30/2022
†21035	Hilo Hawaii Visitor Industry Association, Inc. dba Destination Hilo	Hilo Kāhea Harbor Greetings 2022	\$40,000.00	\$40,000.00	6/25/2021	3/31/2023
†21036	Destination Kona Coast	Kona Kāhea Harbor Greetings 2022	\$28,000.00	\$28,000.00	6/25/2021	3/31/2023
20010 S3	Anthology Marketing Group, Inc	Public Relations, Communications, and Outreach Services	\$ -	\$302,000.00	6/15/2021	12/31/2022
17002 S8	Hawaiʻi Visitors and Convention Bureau	Island Chapters Staffing & Administrative Services	\$(246,840.00)	\$13,637,153.00	6/10/2021	12/31/2021

REPORT OF THE CEO

July 29, 2021

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19006 S4	OmniTrak Group Inc	Visitor Departure Survey 2019-2022	\$(390,081.93)	\$1,473,886.03	6/28/2021	6/30/2023
17029 S17	Hawai'i Visitors and Convention Bureau	Destinations Marketing Management for USA MMA 2021	\$(442,464.00)	\$104,934,807.90	6/21/2021	12/31/2021

Contract Type: • Sole Source † Procurement Exemption

APPENDICES

Monthly Leisure Marketing Report

June 2021

Hawai'i Visitors & Convention Bureau (USA) 2021 Monthly Leisure Marketing Report – June

Market Intelligence/Market Conditions

Economy

- The U.S. economy is still far from normal as the after-effects of social mitigation policy and the last two rounds of fiscal stimulus work through the system. The unemployment rate decreased to 5.7 percent in June. Midyear has arrived, stimulus money is flowing and the share of the U.S. population receiving virus vaccinations is soaring. Finally, the U.S. economy is showing some blue sky. On April 29, the Bureau of Economic Analysis's first estimate for Q1 2021 GDP growth came in with an exceptionally strong annual growth rate of +6.4 percent, according to Robert Dye, Chief Economist, Comerica.
- The Conference Board *Consumer Confidence Index* improved further in June, following gains in each of the previous four months.
 - The Index now stands at 127.3 (1985=100), up from 120.0 (an upward revision) in May.
 - The *Present Situation Index* based on consumers' assessment of current business and labor market conditions rose from 148.7 to 157.7.
 - The *Expectations Index* based on consumers' short-term outlook for income, business and labor market conditions improved to 107.0, up from 100.9 last month.
- “Consumer confidence increased in June and is currently at its highest level since the onset of the pandemic's first surge in March 2020,” said Lynn Franco, Senior Director of Economic Indicators at The Conference Board. “Consumers' assessment of current conditions improved again, suggesting economic growth has strengthened further in Q2. Consumers' short-term optimism rebounded, buoyed by expectations that business conditions and their own financial prospects will continue improving in the months ahead. While short-term inflation expectations increased, this had little impact on consumers' confidence or purchasing intentions. In fact, the proportion of consumers planning to purchase homes, automobiles, and major appliances all rose — a sign that consumer spending will continue to support economic growth in the short-term. Vacation intentions also rose, reflecting a continued increase in spending on services.”

Outbound Travel Market

- Wholesale partners report bookings are very strong into next year. The largest challenge they face is staffing. Many partners are onboarding new agents each month and then having to train them. This coupled with lack of available lodging inventory in Hawai'i and in other top leisure destinations has been challenging.

Competitive Environment

- *European Union*. On June 18, the United States was added to the European Union's approved list of countries for entry, ending a 15-month ban on travel from the United States to Europe due to the pandemic. The move gave EU countries that had not already done so the green light to lift restrictions on U.S. travelers—but it doesn't mean they all did so in a uniform way. Restrictions still vary by country (for example, some still require COVID-19 testing and some do not). Being on this list also opens travel options for U.S. travelers who are unvaccinated, not just for those who are vaccinated. On May 20, European Union leaders had already agreed on measures to allow fully vaccinated visitors to enter the 27-nation bloc. But once countries reach certain epidemiological benchmarks (no more than 75 COVID-19 cases per 100,000 inhabitants, for instance) and are

placed on the approved countries list, it allows for the lifting of restrictions on nonessential travel regardless of vaccination status.

- *Denmark Reopens to Fully Vaccinated.* Travelers will no longer be required to provide a negative COVID-19 test or isolate upon arrival. Unvaccinated children traveling with vaccinated people, as well as pregnant or breastfeeding women, will be required to present a negative PCR test taken no more than four days before arrival.
- *Bermuda.* Revised procedures require that travelers must take a PCR test and obtain a negative result no more than four days before arrival. A \$75 fee covers additional testing upon landing in Bermuda and on days 4, 8 and 14. Residents arriving on the island without a valid pre-arrival test are required to pay a \$300 fee. People who are vaccinated must take a test upon arrival and quarantine until they obtain a negative result. Following that they can move freely but must still be tested on days 4, 8 and 14. Unvaccinated visitors will be subject to supervised quarantine for up to 14 days in one of three designated hotels at their own expense. For children 10 to 17, a saliva test is permitted. Some parts of the website say children 9 and younger do not have to be tested at any point, while other places say all visitors 2 and older must have a negative pre-arrival test. Nonimmunized minors assume the status of their adult companions.

Consumer Trends

- According to *Wall Street Journal* analysis of a Euromonitor report:
 - **Brand Activism.** Consumers paid closer attention to companies' actions during the COVID-19-fueled lockdowns and will take social and environmental issues more seriously after the pandemic ends, Euromonitor says. People will increasingly demand that companies protect the health and well-being of their workforce, help local communities and promote ambitious sustainability goals. During the pandemic, "all of a sudden the air cleared, wildlife came out to play and everything was so much nicer," says Ms. Angus. "It's made consumers realize that actually we want this greener, cleaner climate."
 - **Spontaneity and Convenience.** People miss the spontaneous activities and impulse purchases of their pre-pandemic life — running errands, attending social events, dining out — and they want digital commerce to offer a similar experience, the market researcher says. (It also noted that younger consumers prefer digital interactions while 68 percent of consumers over the age of 60 prefer speaking with human customer-service representatives.) "We really want that on-the-go coffee, that walk and stop for lunch somewhere, that flexibility and ease," says Ms. Angus. "Companies have to find alternative ways to enable that spontaneity in some form."
 - **Open Air.** Even after the pandemic, people's desire for outdoor spaces for work, events and recreation will remain strong, Euromonitor says. "Businesses need to create their own outdoor oasis," the report says. "Adaptation might become more complicated and costly depending on the weather, but open-air structures and heating and illumination systems will pay off due to heightened demand for safe venues and the aesthetic that could continue attracting consumers."
 - **Greater Self-Awareness.** The global pandemic forced consumers to reconfigure their lives and test their mental resilience amid health risks, economic hardship and isolation. Now they are reassessing their priorities, identities and work-life balance, Euromonitor says. Targeting these consumers includes offering access to goods and services that promote self-improvement and lifestyle balance. Global sales of educational, hobby-related toys and games, musical instruments, sports equipment and nostalgic comforts like childhood snacks are expected to rise.

Media Trends

- According to Envato Media:
 - **Short-form Video.** “Short-form video absolutely exploded in 2020 with the introduction of *TikTok* and *Instagram Reels*, and as we predicted, it’s only increased in popularity throughout 2021 – making short, snackable video content a staple of our social media feeds. Most big brands have now jumped on the *TikTok* trend – including Nike and Gucci – to make their brands more accessible and give a glimpse behind the scenes, and almost all the big names are now using *Instagram Reels*, with Chanel and McDonalds utilizing the short-form video feature to promote their products.”
 - **Social Commerce.** “With almost half of the world’s population now using social media, social commerce – the use of social media to drive e-commerce purchases – has become the obvious next step for online shopping. A trend that has been slowly infiltrating our social media platforms over the last few years, social commerce has now been officially cemented as one of the biggest social media trends for 2021. This year so far, we’ve seen the development of social commerce trends such as shoppable video, augmented reality, voice commerce and even sustainable commerce.”
 - **Personalized Marketing.** “With more brands and businesses popping up on social media every day, users are becoming much more selective with the content they’re choosing to consume. As a result, many brands have begun incorporating personalization into their social media marketing strategies to wow their customers and stand out in the crowded social media space. With the increasing amount of user data available on social media, many brands are jumping on personalized marketing and creating campaigns targeting specific groups of customers on social media. Regardless of how you go about it, there’s no denying that personalization is an incredibly effective social media marketing strategy, and a trend that we predict to continue well into 2022.”

Airlift

HTA Airline Seat Capacity Outlook for July-September 2021 was released on July 7. The forecast for domestic scheduled nonstop air seats to Hawai‘i during this period will increase by +28.1 percent compared to the same period in 2019. This projection is based on flights appearing in *Diio Mi*. The constant fluidity of seats and flights will continue as the COVID-19 pandemic evolves. An overall increase of flights is expected from all major market areas: U.S. West (+27.8%) and U.S. East (+30.5%). The situation is being monitored daily and the forecast adjusted accordingly. Note: Beginning in June, HTA began benchmarking airline seat capacity against 2019.

Market Intelligence/Market Conditions Impact on Hawai‘i Travel

- On June 24, Gov. David Ige announced that effective July 8, the State of Hawai‘i will eliminate its pre-travel testing/quarantine requirement for domestic travelers to Hawai‘i who have been fully vaccinated in the United States. Travelers to Hawai‘i must upload their CDC issued vaccination card to the state’s Safe Travels Program website and have that card with them upon arrival in the State of Hawai‘i. The anticipated 60 percent vaccination rate also means that effective July 8, social gatherings are expanded to 25 people indoors and 75 people outdoors. Also, restaurants may increase capacity to 75% – with maximum group sizes of 25 indoors and 75 outdoors. “We anticipate that on or about July 8, Hawai‘i will have achieved a 60 percent vaccination rate. Our residents have sacrificed and worked hard to get to this point, but we still have more to do. Please get vaccinated to protect yourselves and your loved ones. We are close to achieving a 70 percent vaccination rate, at which point all restrictions will end and we can return to the lives we remember,” said Gov. Ige.

- Upload one of three vaccination documents to their Safe Travels Hawai'i account, prior to traveling to Hawai'i. One of the following documents must be uploaded:
 - A CDC COVID-19 Vaccination Record Card
 - VAMS (Vaccination Administration Management System) printout or certificate OR
 - DOD DD Form 2766C
 - The Safe Travels digital platform is now allowing vaccine document uploads for trips arriving in Hawai'i on July 8 and beyond.
 - Sign the online legal attestations on Safe Travels Hawai'i, confirming the uploaded documentation is true and accurate.
 - Bring a hard copy of their vaccination documentation to show screeners at the gate prior to boarding and/or upon arrival in Hawai'i. Screeners will review/verify the vaccination documents, match photo IDs, name and DOB as well as confirm that the attestations are signed.
 - Children under 5 years old are not required to test and will not be quarantined if traveling with an adult who has a pre-travel test exception or a vaccination exception. Children 5 years and older who have not been vaccinated must participate in the Pre-Travel Testing Program and test with a Trusted Testing Partner to bypass the mandatory 10-day quarantine.
- U.S. West
 - As of June 15, the state of California has reopened with restrictions only applied to large events (defined as over 10,000 people for outdoor events and over 5,000 for indoor events), including theme parks and large sporting events. Oregon is on the trajectory to reopen as well, with Governor Kate Brown signing an executive order on June 25 that will eliminate Oregon's County Risk Level framework and all remaining COVID-19 health and safety restrictions that have been issued under Oregon's emergency statutes once 70 percent of Oregon's adult residents are vaccinated against COVID-19 or by June 30 -- whichever comes first. Washington State is following the same trajectory; however, Governor Jay Inslee has maintained that returning residents should continue to follow travel guidelines from the CDC.
 - U.S. East
 - As of June 25, the New York State Travel Advisory is no longer in effect. As such, travelers arriving in New York are no longer required to submit traveler health forms. However, travelers are being advised to continue to follow all CDC travel requirements.

Leisure Activity Update

Consumer

- On-line

Digital Campaign June – Estimated Impressions

PARTNERS	Impressions
AdTheorent	5,086,398
<i>Buzzfeed</i>	1,801,467
Complex	1,637,171
Ogury	437,500
Programmatic	4,897,348
Search	100,000
Tremor	2,344,364
<i>Facebook</i>	12,795,117
<i>Instagram</i>	4,855,611
<i>YouTube</i>	13,144,176
<i>Pinterest</i>	14,207,214
Total	61,306,366

- *Mālama Hawai'i* Brand Campaign
 - As the people of Hawai'i are welcoming mindful travelers back with *aloha*, they are also extending an open invitation to *mālama* (care for) Hawai'i as part of visitors' journey through the islands.
 - The *Mālama Hawai'i* brand campaign continued in June, backed by an integrated marketing plan that includes public relations, paid digital and social media, travel trade training and education, and a coordinated promotion with the Hawai'i travel industry to entice travelers with a trip that gives back – to both Hawai'i and the visitors.
 - Proactive earned media pitching efforts continued to communicate the *Mālama Hawai'i* message to mindful travelers with the inclusion of volunteer opportunities for all visiting content developers. Travel trade efforts also continued to actively educate travel sellers across the country on the benefits their customers will reap by experiencing a deeper connection with Hawai'i.
 - Paid digital and social media continued to share and distribute new videos by four Hawai'i ambassadors invested in the regenerative areas of aquaculture restoration, sustainable farming, reforestation, and wildlife preservation. The campaign call-to-action directs consumers to gohawaii.com/malama, where potential visitors can explore a multitude of promotional offers from Hawai'i industry partners who have collaborated with volunteer organizations statewide to give travelers an opportunity to stay an extra day - at no charge - if they participate in a voluntourism activity.
 - *Mālama Hawai'i* shares a vision of regenerative tourism that provides visitors with an enriching experience and has them going home knowing that when they travel mindfully and *mālama* the

islands through unique volunteer opportunities – they are preserving, protecting and perpetuating Hawai'i for future generations of residents and visitors alike.

- Consumer Paid Media
 - A national flight of paid digital media continued in June to reach the Hawai'i target audience and to share the new leisure brand campaign messaging - *Mālama Hawai'i* – with four (4) new videos distributed in various lengths on vetted paid digital and paid social media.
 - OTT/CTV/Advanced Television streaming media partners include Amazon, Roku, Hulu to distribute *Mālama* videos in 30-second length versions.
 - Video Distribution media partners include AdTheorent, *BuzzFeed*, Complex, Tremor, Ogury, OMD programmatic to distribute *Mālama* videos in 15-second and 30-second length versions (optimized for video completion metrics).

Travel Trade

- Paid Trade Media
 - The Travel Trade campaign continued in June with a flight of digital media that shares the *Mālama Hawai'i* brand messaging with travel advisors, directs them to get the latest updates and learn more about the current destination entry requirements, and invites them to become certified Hawai'i Destination Specialists. Paid endemic media partners include Northstar and TravAlliance and paid social media partners *Facebook* and *Instagram*.
 - Total estimated digital gross impressions - June: 2,338,569
- Cooperative Marketing Program
 - A statewide cooperative marketing program extended into June to support the industry in the destination's reopening efforts. The program includes good industry support with seven large, anchor partners and 31 additional partners enrolled statewide to maximize and leverage the collective destination promotion undertaken. Participating offers are featured on the destination co-op landing page. The program is backed by a flight of tactical, conversion paid media, informed by HVCB first party data, to drive ideal Hawai'i target consumers to the destination co-op landing page where they're exposed to *Mālama Hawai'i* brand messaging and able to link off to the partners' booking offers.



Public Relations

- HVCB
 - HVCB and Island Chapter PR teams hosted a statewide Hawai'i Virtual Media Blitz with over 70 individual media appointments June 14-18 and June 21-25. Meetings included HVCB and/or Island Chapter PR representatives as well as island partners and/or ambassadors and covered the Hawai'i's Safe Travels Program and *Mālama Hawai'i*. Efforts included partner and ambassador outreach, targeted media invite list curation, the creation of a landing page through which attendees could register for appointments and media pitching.
 - HVCB PR team communicated key travel and protocol information to PR industry professionals, local and national broadcast stations, leisure publications, editors and freelance journalists. On June 4, the team drafted and distributed a release titled, "Hawaii's Inter-County Travel Restrictions to End on June 15." The release followed Hawai'i Governor David Ige's press conference announcing the end of all restrictions for inter-county travel, starting Tuesday, June 15. The release was also distributed nationwide via PR Newswire and picked up on over 120 online sites. A release titled, "HVCB UPDATE - Hawaii Ground Transportation Options" was distributed to communicate that Hawai'i, like many vacation destinations, is currently experiencing a rental car shortage on June 8. To inform industry partners of key changes to the Safe Travels program, the team released an update titled, "HVCB UPDATE - Safe Travels and Point of Entry in Hawaii Beginning June 15" on June 14.
 - HVCB PR team supported United Airlines' press trip to Maui to promote their new Newark-Kahului route by hosting various journalists' accommodations, ground transportation and activities, including *Mālama Hawai'i* experiences. Journalists included Alison Fox (*Travel + Leisure*), Julia Dennison (*The Daily Mail*) and Pandora Amoratis (*Parents Magazine*).
 - HVCB secured a broadcast opportunity and partnership with the PBS and Create TV series, *Fly Brother with Ernest White II*. This show is mission driven in support of diverse initiatives and communities, sustainability and mindful travel, which aligns well with HTA/HVCB's marketing pillars. Ernest is a public speaker and travel writer and was named to *Condé Nast Traveler's* 2021 Advisory Board. Therefore, in addition to the TV coverage, there will be earned media coverage in the future. The air date is tentatively set for September 2021.
 - To inspire mindful travel and participation in the *Mālama Hawai'i* initiative, the HVCB and Island Chapter PR teams secured several pieces of coverage in June. A story titled, "Voluntourism in paradise: 5 incredible opportunities to give back on Maui" in *Matador Network* shared voluntourism experiences for Maui Nui on June 16. A *Forbes* story titled, "Go Back, Give Back: Hawai'i's Mālama Program Rewards Visitors For Traveling Responsibly" featured various partnerships between resort and volunteer activities and organizations. The team also secured a story in the *Toronto Star* titled, "Why regenerative travel is the trend that could change the world."

Forbes

Go Back, Give Back: Hawai'i's Mālama Program Rewards Visitors For Traveling Responsibly



Kim Westerman Senior Contributor
Travel
Luxury and family travel, food destinations, wine and coffee trends.

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As the world opens up again, travelers seem to be flocking to the Hawaiian Islands, one of the safest places to visit right now. It's no small feat to re-open hotels and restaurants safely, as well as to implement a rigorous COVID-19 screening program that ensures the wellbeing of both locals and visitors. So far, the state of Hawai'i is knocking it out of the park with maintaining the high level of hospitality the islands are known for while making sure everyone stays safe.



Aloha Ambassador Healani Kimitete-Ah Mow leads the E Ala E ceremony at Mauna Kea Beach Hotel.
MAUNA KEA BEACH HOTEL

- Media coverage highlights:
 - “This hip neighborhood has one of the best food scenes in Hawaii” – *10Best USA Today* – Marla Cimini – June 2
 - “25 Natural Wonders of the World You Can Still Visit” – *RD.com* – Leila Najafi – June 2
 - “A guide to each of the Hawaiian Islands” – *Budget Travel* – Kylie Ruffino – June 3
 - “Getting to Hawaii with United Airlines” – *Budget Travel* – Kylie Ruffino – June 7
 - “Hawaii Sets Plan to Lift All Travel Restrictions Based on Vaccine Rates” – *Travel + Leisure* – Alison Fox – June 7
 - “\$349 – Waikiki 3-Night Stay for 2: Dates through March” – *Budget Travel* – Kylie Ruffino – June 10
 - “Why regenerative travel is the trend that could change the world” – *The Toronto Star* – Michele Bigley – June 12

TRAVEL

Why regenerative travel is the trend that could change the world



By Michele Bigley Special to the Star
Sat., June 12, 2021 | 4 min. read



- “Everyone’s going to Hawaii, and the resorts aren’t ready” – *The Seattle Times* – Jen Murphy – June 16
 - “Go Back, Give Back: Hawaii’s Malama Program Rewards Visitors For Traveling Responsibly” – *Forbes* – Kim Westerman – June 19
 - “My top 5 things to do on the Island of Hawaii” – *The Points Guy* – Clint Henderson – June 20
 - “Visiting Hawaii taught me the art of 'Aloha' is more than a greeting” – *The Houston Chronicle* – June 23
- KVB
 - Kaua’i was featured in:
 - “A guide to each of the Hawaiian Islands” - *Budget Travel* (uvpm: 150,000) - Kylie Ruffino - June 3
 - “Getting to Hawaii with United Airlines” - *Budget Travel* (uvpm: 150,000) - Kylie Ruffino - June 7
 - *GolfPass* (975,000 subscribers). Coverage resulted from Kaua’i Golf Media FAM participant Jason Deegan, June 20-24. His article, “Is this the best bargain golf course in America?” published on June 29, features Wailua Golf Course.
 - *Golf.com* (uvpm: 681,569) and *Golf Magazine* (1,403,390 subscribers). Coverage resulted from John Ledesma attending the Kaua’i Virtual Golf FAM in March. “Best Municipal Golf Courses in America,” published June 9 on *Golf.com* and in the June publication of *Golf Magazine*, included Wailua Golf Course as one of the top 30 municipal golf course across America.

- Coordinated a media visit for freelance writer Melanie Haiken, *The Points Guy*, June 6 – 11 for confirmed coverage highlighting responsible and mindful travel, Hawai'i's Safe Travels Program, HVCB's *Mālama Hawai'i* Program, and unique outdoor experiences on Kaua'i. Provided Melanie assistance with accommodations, ground transportation, and activities on behalf of HVCB's program budget.
- Connected HVCB with ambassadors on island to gauge interest and availability to discuss cultural and mindful experiences, farmers markets, and *Mālama Hawai'i* Program activities on Kaua'i and request for participation in HVCB's paid media campaign with Matador Network, June 22 – 25.
- Provided HTA with recommendations for alternative transportation options on Kaua'i for HTA's website specifically its COVID alert page under the rental car shortage alert. Recommendations included public transportation, shuttles, ridesharing, and KVB partners, Kaua'i Luxury Transportation and Polynesian Adventure.
- Held an on island Golf Media FAM in conjunction with Go Golf Kaua'i coop and True Golf Solutions, June 20-24 with the following participants
 - John Ledesma – Managing Editor, *GOLF Magazine*
 - Don Jozwiak – Editor, *Carolinas Golf Magazine* and *PGA Magazine*
 - Jason Deegan – Writer, *GolfAdvisor/GolfPass*
 - Brice Butler – Golf social influencer (and former NFL wide receiver)
 - Scott Kauffman – Freelance Golf
- Finalizing on island Fall Golf Influencers FAM in October 2021 with:
 - Sam Bozoian – Social Influencer and Foreplay Podcast
 - Brodie Smith – Social influencer and disc golf trick shot artist
 - Kelsey Lowrance – Social influencer
 - Patrick Koenig - Social influencer and golf photographer
- Conferenced via Zoom with the following media for HVCB's virtual media blitz for Kaua'i, June 24-25, to discuss updates regarding the state's Safe Travels Program, *Mālama Hawai'i*, mindful travel, and partner updates; including new tours, activities, and markets on Kaua'i.
 - Bill Fink – Freelance writer, *AARP*, *TravelAge West*, *Los Angeles Times*
 - Jay Jones – Freelance writer, *Chicago Tribune*, *Lonely Planet*, *Los Angeles Times*
 - Jeanne Cooper – Freelance writer, *San Francisco Chronicle*, *Frommer's*, *Marin Magazine*
 - Jill Robinson – Freelance writer, *Afar*, *National Geographic*, *Conde Nast Traveler*
 - Julie Bielenberg – Freelance writer, Rachel Ray, AAA, USA Today
 - Karla Bruning – Freelance writer, *Shape*, *Self*, *Parents*
 - Keyla Vascinellos – Freelance writer, *Darling Magazine*, *Travel + Leisure*
 - Marlynn Schotland – Freelance writer, *Urban Bliss Life*
 - Michelle Winner – Freelance writer, *Travel Pulse*, *Brides*
 - Kai Oliver-Kurtin – Freelance writer, *Marie Claire*, *San Diego News*
- Liaised with 48 media in June:
 - Tanvi Chheda, *Travel + Leisure*
 - Lisa Corson, *Afar.com*
 - Carolyn Owens, *Los Angeles Magazine*
 - Edmund Vallance, *Los Angeles Times*
 - Emily Kaufman, *The Travel Mom*
 - Erica Sloan, *Martha Stewart Living*
 - Jade Snow, *Hawaii Magazine*
 - Katherine Parker-Magyar, *Forbes*
 - Laura Brown, *Lonely Planet*
 - Ligaya Malone, *Condé Nast Traveler*
 - Lisa Jhung, *Outside Magazine*

- Liz Vaccariello, *Real Simple Magazine*
 - Melanie Haiken, *The Points Guy*
 - Michele Hermann, *Forbes*
 - Mimi Towle, *Marin Magazine*
 - Sarah Dubbeldam, *Darling Magazine*
 - Sarah Funk, *Travel + Leisure*
 - Sherrie Nachman, *Forbes*
 - Sunny Fitzgerald, *The Washington Post*
 - Sunshine Flint, *Afar*
 - Megan Michelson, *Outside*
 - Michele Bigley, *San Francisco Chronicle*
 - Kylie Ruffino, *Budget Travel*
 - Sunny Fitzgerald, *Travel + Leisure*
 - Megan Wiskus-Lim, *Style Magazine*
 - Sarah Sekula, *Outside*
 - Cheryl Tsutsumi, *AAA Explorer*
 - Julia Eskins, *Condé Nast Traveler*
 - Kendall Kostelic, *Treasure Box Tours*
 - Bill Fink, *TravelAge West*
 - Jay Jones, *Chicago Tribune*
 - Jeanne Cooper, *San Francisco Chronicle*
 - Jill Schildhouse, *Afar*
 - Julie Bielenberg, *Rachel Ray*
 - Karla Bruning, *Shape Magazine*
 - Keyla Vascinellos, *Darling Magazine*
 - Marlynn Schotland, *Urban Bliss Life*
 - Michelle Winner, *Travel Pulse*
 - Kai Oliver-Kurtin, *Marie Claire*
 - Shelley Rubenstein, *National Geographic Traveller (UK)*
 - Robert Semmann, *Respect Lifestyle Magazine (Germany)*
 - Sarah Sekula, *USA Today*
 - John Marshall, *Associated Press*
 - Jason Lusk, *Golfweek*
 - Tom Coyne, *The Golf Journal*
 - Mike Dojc, *Forbes*
 - Dylan Dethier, *GOLF Magazine*
 - Danny and Alice Scott, freelance writers
- OVB
 - O‘ahu was featured in:
 - *USA Today* (uvpm: 36,842,180). Coverage resulted from an individual media visit from Marla Cimini in March 2020. Her article, “This hip neighborhood has one of the best food scenes in Hawaii” features Kaka‘ako, Moku Kitchen, Mana Up and more.
 - *Toronto Star* (uvpm: 1,720,773). Coverage resulted from an individual media visit from Michele Bigley in June 2021. Her article, “Why regenerative travel is the trend that could change the world” features John De Fries, *Mālama Hawai‘i* campaign and more.

- *Forbes* (uvpm: 33,734,080). Coverage resulted from an individual media visit from Kim Westerman in May 2021. Her article, “Go Back, Give Back: Hawai‘i’s Mālama Program Rewards Visitors For Traveling Responsibly” features the *Mālama Hawai‘i* campaign.
- *Condé Nast Traveler* (uvpm: 1,069,148). Coverage resulted from Jamie Ditraranto’s requested media assistance in May. Her article, “A Look Back at Waikiki’s Surf History—and Why It’s Still the Best Place to Learn the Sport” features Desoto Brown, Bishop Museum and more.
- Individual Media Visits
 - Kylie Ruffino, *Budget Travel* (uvpm: 150,000) O‘ahu visit June 10-13
 - Leila Najafi, *Thrillist* (uvpm: 3,607,069) *USA Today* (uvpm: 1,621,091) O‘ahu visit June 8-11
 - Michele Bigley, *SFGate* (uvpm: 9,457,598) O‘ahu visit June 10-16
 - Carolyn Richardson, *TripSavvy* (uvpm: 14,423) *LA Parent* (uvpm: circ: 77,100, uvpm: 7,057) O‘ahu visit June 20-25
 - Deborah Perry Piscione, *ForbesWomen* (uvpm: 33,734,080) O‘ahu visit June 23-July 4
- Liaised with 25 media in May:
 - Sunny Fitzgerald, *The Insatiable Traveler*
 - Kylie Ruffino, *Budget Travel*
 - Leila Najafi, *Thrillist*, *USA Today*
 - Michele Bigley, *SFGate*
 - Carolyn Richardson, *TripSavvy*, *LA Parent*
 - Deborah Perry Piscione, *ForbesWomen*
 - Dakota Kim, *Freelance*
 - Shahfreen Elavia, *Divine Magazine* (HTCanada)
 - Rachel Ng, *National Geographic*, *AAA*, *Outside*
 - Maya Fitzpatrick, *Maya Hood Blog*
 - Adrienne Jordan, *AFAR*
 - Nicole Kultura, *Destination Luxury*
 - James Barrett, *Freelance*
 - Benjamin Setiawan, *Forbes*
 - Michelle Winner, *Freelance*
 - Lisa Jhung, *Freelance*
 - Jill Robinson, *Freelance*
 - Michele Herrmann, *Freelance*
 - Kristie Hang, *Freelance*
 - Lizbeth Scordo, *Freelance*
 - Sunny Fitzgerald, *Freelance*
 - Caroline Teel, *SmarterTravel Media*
 - KyAnn Lewis, *KidTripster*
 - Brooke Geiger McDonald, *Freelance*
- MVCB
 - Individual Media Visits:
 - Leila Najafi, freelance: *Thrillist* (circ: 13.0Mil) and *USA Today* (uvpm 129.0Mil). Maui visit June 7-11.
 - Kylie Ruffino, freelance: *Budget Travel* (uvpm 290K). Maui visit June 9-11.
 - Kira West, @ *bykwest*/Social media influencer. Worked with United Airlines to provide assistance on itinerary for Maui visit May 26-June 2.

- Press Trips:
 - MVCB liaised with HVCB on a United Airlines Press Trip promoting the inaugural Newark, NJ (EWR) - Kahului, HI (OGG) direct flight that launched in June. Media included Allison Fox, freelance *Travel + Leisure* (uvpm 8.5Mil); Julie Dennison, editor *Parents.com* (uvpm 6.65Mil) and Pandora Amoratis, writer *Daily Mail* US version (uvpm 181.3Mil) June 17-21. Hotel stays included newly opened AC Hotel by Marriott Maui, Wailea, and refurbished Kā'anapali Beach Hotel. Excursions included Mālama Maui activity at Kipuka Olowalu, Maui Ku'ia Estate Chocolate Tour, Kiawe Outdoor event at Hotel Wailea, UFO Parasail and Teralani Sunset Sail.
- Liaised with and/or provided information or image(s) assistance to the following media:
 - Ben Davidson, freelance: *AAA Encompass Magazine* (circ: 400K) and *Coastal Living* (Circ: 4Mil), Setting up itinerary for Maui and Lana'i trip Aug. 8-17.
 - Mike Reifeiss and Marko Nikolic, *@Golfholics/Social Media Influencers*. Setting up itinerary for Maui visit July 25-Aug.1.
- IHVB
 - The island of Hawai'i was featured in:
 - *CNN*, (uvpm: 643,317), "Top 10 US Beaches for 2021 from Dr. Beach," May 29. Coverage resulting from drafting and providing R. Birch quote in May 2021.
 - Individual Media Visits in June:
 - Ernest White, PBS' Fly Brother, June 10-17
 - Kim Westerman, *Forbes*, June 12-18
 - Liaised with 13 media in June:
 - Al Bonowitz, *AAA*
 - Rachel Trent, *CNN*
 - Robert Kaufman, *Golf Tips Magazine*
 - Anne Lee, *Honolulu Star Advertiser*
 - Peter Buol, *Freelance Writer*
 - Maryrose Hicks, *Social Media Influencer*
 - Zoe Aust, *Social Media Influencer*
 - Melissa, *Social Media Influencer*
 - Janna, *Social Media Influencer*
 - Ed Rampell, *Freelance Writer, LA Progressive, Hollywood Progressive, San Diego Reader*
 - Merilee Kern, *Freelance Writer, Fox Business, Bloomberg Television, The Luxe List*
 - Shane Mitchell, *Saveur*

Travel Trade Activities

	Airline	Wholesaler/TA/TO/OTA/Other	Total
HVCB		93	93
KVB			0
OVB	1	3	4
MVCB	1		1
IHVB		5	5

Summary of Key Travel Trade Activities

- HVCB
 - For the month of June, travel trade hosted six educational webinars/virtual training sessions for a total of 532 participants and was involved in 10 industry partner meetings with a total of 23 participants; there was one trade show and 76 one-on-one virtual travel advisor appointments in the month. This gave us a total of 93 travel trade sales activities in the month. HVCB and the Island Chapters are working closely with industry partners to communicate the Safe Travels Program, pre-testing protocols, trusted travel partners list and share all the important links via the travel agent website, linking to *gohawaii.com* and the DOH accordingly.
 - The team fielded all inquiries received from travel advisors across the United States via the *agents.gohawaii.com* site who required assistance to plan their clients' trips and navigate the Safe Travels program.
 - HVCB presented a virtual training for 75 Virtuoso advisors on June 1. The webinar covered updates on Hawai'i's travel protocols, information on *Mālama Hawai'i* and island updates.
 - Cruise Planners hosted a virtual consumer event, *Where to Next*, featuring the Hawaiian Islands that aired on June 8. It was an interview format with HVCB, Classic Vacations and Norwegian Cruise Line as panelists. The event drew 700 consumers and 30 Cruise Planners advisors.
 - HVCB participated in Gifted Travel Network's Vendor Lounge on June 9 for 222 advisors. The virtual presentation included a brief update on Hawai'i's travel protocols and an overview of the *Mālama Hawai'i* campaign.
 - HVCB participated in one-on-one appointments with 28 advisors at the Virtual Vacation Events Luxury Travel Show on June 11. HVCB's virtual trade show booth was visited by 551 advisors.
 - The Romance Travel Forum held an in-person event June 14-17 in Riviera Maya, Mexico. As an event sponsor, HVCB delivered a presentation to 107 vetted travel advisors and conducted 48 one-on-one appointments. Hawai'i suppliers in attendance included ALG Vacations and Classic Vacations.
 - ASTA South Florida Spring Affair was held in-person June 23-24 in Fort Lauderdale, FL. As an event sponsor, HVCB conducted a destination presentation and participated in a panel discussion. There were 90 travel advisors in attendance.
 - HVCB presented at the New Jersey ASTA Meeting on June 28 for 48 advisors. The virtual presentation covered updates on Hawai'i's Safe Travels program, information on what visitors can expect in Hawai'i and ground transportation alternatives, as well as an overview on the *Mālama Hawai'i* campaign.
 - Travel agent website *agents.gohawaii.com* update: There were 627 online graduates who completed the Hawai'i Destination Specialist and/or Island Specialist educational courses online, and 790 new registrants signed up for access to online resources. The travel agent database numbers are now up to 90,211 email contacts, which includes 34,466 active U.S. travel advisor profile records.
- IHVB
 - AAA Lynwood, WA webinar, June 8 (8 advisors). Destination updates, travel protocols.
 - Woodside Travel, WA webinar, June 9 (12 advisors) Destination updates, travel protocols.
 - Uniglobe Travel, OR webinar, June 15 (14 advisors). Destination updates, travel protocols.
 - Avoya Travel, CA webinar, June 16 (6 advisors). Destination updates, travel protocols.
 - Carefree Travel / Frosch, June 21 (8 advisors). Destination updates, travel protocols.
- KVB - None to report

- MVCB
 - Hosted a snorkeling tour activity for United Airlines Vacations FAM 12 agents - June 12 - attended a FAM hosted by Marriott
 - Gave presentation to United Airlines FAM group on Maui Nui on June 15
- OVB
 - Mailpound webinar, June 7 (143 advisors). The webinar was titled, Mahalo Monday: Destination Updates For The Island of O’ahu
 - Hawaiian Airlines webinar, June 9 (157 advisors). O’ahu 101 and Destination Travel / Safety Protocol Updates

Key Performance Indicators - Leisure Market

Consumer

Digital Campaign May Actual Impressions

PARTNERS	Impressions
AdTheorent	5,086,398
<i>Buzzfeed</i>	1,801,467
Complex	1,637,171
Ogury	437,500
Programmatic	4,897,348
Search	100,000
Tremor	2,344,364
<i>Facebook</i>	4,634,367
<i>Instagram</i>	1,754,987
<i>YouTube</i>	6,334,912
<i>Pinterest</i>	1,046,569
Total	30,075,083

Public Relations

- Month-end impressions and publicity values for articles that included Hawai’i – May results

Impressions and Publicity Values for May

MAY	Impressions	Publicity Values
Print	68,159,724	\$11,596,085
Online	63,965,892,337	\$23,411,677
Broadcast	720,255,806	\$14,996,389
Total	64,754,307,867	\$50,004,151

Countermeasures

- On June 15, inter-county requirements and restrictions for travelers ended and the Safe Travels program went to a single point of entry. The Hawai'i Visitors and Convention Bureau's call and email teams continued to field and answer questions about requirements for travel to the islands and details about Safe Travels. Staff shared this and other updates with media, travel trade, MCI clients, and various constituencies.
- HVCB's 1-800-GoHawaii call center fielded more than 23,000 calls in June. In addition, HVCB staff and call center agents responded to nearly over 16,000 Safe Travels inquiries to info@gohawaii.com.

Responsible Tourism Update

- Hawaiian Culture
 - HVCB
 - The *Mālama Hawai'i* brand campaign continued in June, which shares a vision of regenerative tourism that provides visitors with an enriching experience and has them going home knowing that when they travel mindfully and *mālama* the islands through unique volunteer opportunities – they are preserving, protecting and perpetuating Hawai'i for future generations of residents and visitors alike.
- Natural Resources
 - HVCB
 - In conjunction with the *Mālama Hawai'i* brand campaign launch, the consumer and travel trade enewsletters announced the program that invites visitors to *mālama* the islands through unique volunteer opportunities that focused on the preservation and protection of the Hawaiian Islands' wildlife.
 - IHVB
 - Distributed quarterly consumer email to 73,821 opt-in subscribers (Zeta), June 24; messaging, *Mālama Hawai'i* on Hawai'i Island to support/amplify program messaging.
- Community
 - HVCB
 - With the relaunch of the enewsletter program, a section was dedicated in the consumer and travel trade enewsletter to remind travel agents of the current travel requirements into the state and provide a list of resources for them to access to keep up to date and satisfy those requirements. Additionally, a prominent banner on the consumer enewsletter directs readers to the gohawaii.com Travel Requirements resource page.
 - KVB
 - In response to the current pandemic, executive director Sue Kanoho continued to work regularly 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 including discussion on Kaua'i rejoining the Safe Travels Program and regulations and rules regarding MCI and groups.
 - KVB held and participated in numerous meetings with government and private entities in response to the rental car shortage and exploring and establishing shuttle service to provide transportation to visitors.

- Continued “Resort Bubble” efforts in coordination with the County as an option for those arriving to Kaua’i that do not meet Safe Travels requirements but qualify for the resort bubbles. The “Resort Bubble” program on the island will end on July 8.
- Presented island and Safe Travel updates at the Lihue Business Association meeting.
- OVB
 - In response to the car rental shortage, participated in a call with new carshare app, Holoholo, to discuss partnerships with OVB/HVCB and visiting media.
 - With the start of hurricane season, OVB participated in the Makani Exercise Review, led by the City & County of Honolulu Department of Emergency Management, with other county departments, with other O’ahu stakeholders and with the OVB EM industry security hui in preparation for a potential crisis.
 - Alongside HTA, City & County of Honolulu and the O’ahu Destination Management Action Plan (DMAP) Steering Committee, OVB has diligently participated in the Community-based DMAP process and meetings as part of the steering committee. In June, the O’ahu DMAP Steering Committee developed and fine-tuned the “actions” for O’ahu.
- MVCB
 - Supporting Maui County’s Mālama Maui County Pledge promotion with distribution of a rack card to hotel and activity partners. Also showcased video on social media channels in June 2021.
- IHVB
 - Continued to support the County cohort team overseeing Pono Communications action plans/steps for the County of Hawai’i’s (COH) Tourism Strategic Plan.
- HTA Events and Programs.
 - Provided media assets on behalf of HTA for event and program sponsorships:
 - Pop Up Makeke: Provided *Mālama Hawai’i* video and banner assets for HTA’s sponsorship of Pop Up Makeke.
 - OVB: Met with and began dialog with partners from Hawai’i Contemporary and UMU Hawai’i on ways to collaborate and support the events, activities and efforts surrounding Hawai’i Contemporary (Honolulu Triennial).

Island Chapters Engagement Update

- IHVB
 - Hawai’i Tourism Canada (HTCAN) - provided recipes for possible inclusion in *divine.ca*, an online publication

“Coming Attractions” for Leisure Market

	What	When	Where
HVCB	Individual Media Visit: Kathryn Romeyn (<i>Brides, Self, Conscious Traveler</i>)	June 25-July 1, July 4-6	Hawai'i Island and O'ahu
	Individual Media Visit: David Dickstein (<i>OC Register</i>)	July 15-21	Kaua'i and O'ahu
	Individual Media Visit: Wendy O'Dea (<i>USAToday</i>)	July 19-24	O'ahu
	Individual Media Visit: Judy Koutsky (<i>Forbes</i>)	July 19-29	Maui, Hawai'i Island, O'ahu
	AAA Northeast Pau Hana Educational Event	July 1	Virtual
	Gifted Travel Network Vendor Presentation	July 8	Virtual
	Global Travel Marketplace (GTM)	July 8-10	Fort Lauderdale, FL
	“KHM Today” Interview	July 14	Virtual
	AWTA Meeting – Hawaiian Lū'au	July 20	Hastings-On-Hudson, NY
	WESTA Owner Meeting	July 23-26	Puerto Vallarta, Mexico
	Cruise360	July 28-30	Hollywood, FL
	Virtuoso Webinar	July 28	Virtual
	MAST Summer Workshops	Aug. 3-4	Palos Hills & Glen Ellyn, IL
	Chicagoland Hawai'i Seminar with Outrigger Hotels & Resorts	Aug. 3-5	Downers Grove & Arlington Heights, IL
	Virtuoso Travel Week	Aug. 8-13	Virtual
	Virtuoso Immersion Webinar	Aug. 18	Virtual
	ASTA Global Convention	Aug. 23-26	Chicago, IL
KVB	Global Travel Marketplace	July 8-10	Ft. Lauderdale, FL
OVB	Pleasant Holidays Webinar: Multigen. Family Travel	July 29	Virtual
	Mailpound Webinar	Aug. 9	Virtual
	Pleasant Holidays Webinar: Outdoor Adventure / Conscious Traveler / Mālama O'ahu	Aug. 19	Virtual
	Mailpound Webinar	Sept. 1	Virtual
	IPW	Sept. 18-22	Las Vegas, NV
	Pleasant Holidays Webinar: History / Culture	Sept. 22	Virtual
	Mailpound Webinar	Oct. 7	Virtual
MVCB	None to report		
IHVB	Q3 Consumer Opt-In E-mail	Sept. 22	Online

Hawai'i Tourism Japan

2021 Monthly Leisure Marketing Report – June

Market Intelligence/Market Conditions

Economy

- **GDP forecast:** According to Nikkei NEEDs forecast, 2021 economy recovery is expected in late 2021 with real GDP growth of +5.0% for 2021 and +2.6% for 2022. Consumption rates are also expected to increase by +4.0% in 2021 and +1.9% in 2022. [\(source\)](#)
- **Olympics economic impact:** With spectators being reduced to a maximum of 10,000 per venue or 50% of capacity, the Olympics will not make much of a difference when it comes to the economy. Nomura Research Institute estimates that the economic benefits of the Tokyo Games will be ¥1.72 trillion (\$16 billion) if spectators are allowed at each venue in accordance with the attendance limits. The figure is ¥89.4 billion less, or down 4.9%, from the estimated ¥1.81 trillion economic windfall for an Olympics held with no attendance limits on domestic spectators. The Daiwa Institute of Research puts economic gains during the games at ¥520 billion. Of the total, ¥70 billion would come from spending by Olympic and Paralympic participants and spectators, and ¥150 billion by households. [\(source\)](#)
- **Vaccine passport:** Keidanren (Federation of Economic Organization) consolidated the overview of vaccine passport. The government expressed the implementation of vaccine passport issued by local government starting from mid-July. Keidanren stated these efforts will increase international business activities and progress of economic recovery. [\(source\)](#)
- **Vaccination progress:** The Japan government announced over 1 million per day vaccination applied in June. The economists analyze this vaccination progress will push up 1% of real GDP growth. [\(source\)](#) With this progress, major wholesalers are ready to roll out business after Olympics and adjust the program with airlines and hotels.

Outbound Travel Market

Competitive Environment

- Tourism Recovery Efforts

Las Vegas	Exe. Director of LV Tourism Bureau interviewed and expressed Japan is major part of tourism recovery.
France	Announcement of tourism recovery promotion specifically for Japan to increase the business for Golden Week period starting end of 2021 and early 2022.
Germany	Germany has started global campaign called “German.Local.Culture” which including Culture, Artisan, Food and Nature. For Japan, “Goethestraße” promotion starting August, Xmas market from September to November are planned along with SNS campaign “#YoursTrulyGermany”. Also, Sustainability campaign “FEEL GOO” also start in July.
England	Taking advantage of G7 Summit in June, England will promote major events in 2022 including XXII Commonwealth Games, Queen Elizabeth 70 th reign Jubilee and Festival UK 2022 for tourism attractions.

- Online promotion

New Zealand	Creation of virtual experience tours
Canada	Collaboration with JTB x Fuji TV “Vancouver Online tour”
Switzerland	Switzerland at home online tours series
Philippine	#Philippine at home online event
Maldives	Establishment of “My virtual Maldives”
Australia	Development of Australia must do function in Google map
Germany	Collaboration with Asahi News Digital “Online global trip at home LIVE”

- Travel Trade Initiatives

Indonesia	Tourism seminar 2021 for target travel agents in June: Current COVID19 situation, tourism recovery plans were presented.
Guam	Travel agent 4 days online seminar “GVB Get Up And Move Webinar” (6/29 – 7/2) involved with Guam’s stakeholders as presenters.
Honk Kong	Travel agent online seminar was held and updated current COVID19 and tourism plan and campaign “Open House” aimed end of 2021.

- Reopen Conditions

Thailand	Government of Thailand announced to restart foreign entry within in next few months. Phuket is the 1 st area for tourism recovery and exemption of quarantine starting 7/1, 2021.
Guam	Guam government approved the vaccine tour called “Air V&V (vaccination and vacation)” available for not only US citizens, but also foreign travelers including Japanese.

Consumer Trends

- **Tourism recovery forecast:** Based on the research company, US Phocuswright, Japan tourism market will be exceeding pre-pandemic level in 2023. This is estimated based on increasing vaccination and reduction of COVID19 new cases. Domestic travel will be coming back first, then, expended to international travel later. HTJ is preparing for the Hawai’i promotions period and utilizing Mālama Hawai’i concept. [\(source\)](#)
- **Booking.com market research:** Booking.com announced the market trend based on 2020 vs 2021 travel search destination for both Domestic and International between July and August period. In the result, Honolulu is the no.1 destination for summer travel over other short-haul Asian destinations and European destinations (followed by Bangkok, Thailand and Manila, Philippine) HTJ will continue distributing Hawai’i’s updates and messages through digital marketing to keep Hawai’i as their travel choice for future. [\(source\)](#)

Digital Marketing Trend

- **Instagram installment of map search function:** Instagram announced the new map search functions for Japan users. This function allows users to find the popular and near spots on their Instagram discovery tab. Also, these spots also will be appeared # (hashtag) search result page. This is great opportunities for especially Aloha Program satellite offices and restaurants to promote their service and locations. [\(source\)](#)

Travel Trends

- **More dynamic package businesses:** The demands of dynamic package (DP) have been escalated because of COVID19 condition along with OTA’s presence in Japan. Traditional tour

packages sales at the counters are shifted to online reservation. Many wholesalers business models also shifted to online and digital marketing. [\(source\)](#)

- **JTB:** JTB introduced domestic DP brand “MyStyle” in 2020 May and is targeting the DP revenue share to be 80% of total travel revenue.
- **HIS:** HIS has also emphasized on domestic DP and created “Rail+Stay DP” and will expand to include DP business program.
- **KNT-CT:** KNT-CT’s FIT business is shifted to online platform in 2020 and the domestic travel DP started selling from October 2020 followed by outbound travel DP.
- **Summer promotion with media:** Both Wholesalers and OTAs are planning tourism recovery by utilizing media exposures and expressed to align their promotions with HTJ recovery efforts.
- **JTB’s new digital marketing service:** JTB launched the digital tools “LOOK JTB Smart Hawai’i” starting July. Wholesalers will put more resources to digital promotion after COVID19.

• **Major Wholesalers Package tour stop-sell period**

Wholesalers	Stop-sell until
Hankyu, KNT-CT	7/31
JTB	8/5
HIS	8/15
ANA Sales, JALPAK, Club-Tourism	8/31

Media Trends

- **Nikkei MC** celebrated its 50th anniversary and renewed the website contents. This media focuses on consumer trends, sustainable environment and societal oriented contents. [\(source\)](#)
- **New media for niche market:** New media model have established recently to reach niche market. As examples, Edu-ship is collaborating with Yomiuri Newspaper Tokyo, Tsukuba University to establish Sports specific media “School Sports Journal (nickname: Ima Challe)” and 3 issues per year distributing to schools/educational institution throughout Japan. New culture focus media, “Be independents” online media by SKIYAKI in the part of “Bitfan” featuring media creators also established. [\(source 1\)](#) [\(source 2\)](#) With these niche market media, HTJ see the potential to influence the readers in specific interest that Hawai’i may provide.

Airlift

In the month of June, 3 major airlines (ANA, HA & JAL) operated 8 flights per week (total 34 flights, 8,368 seats) and will continue similar operations until end of September. Due to the pent-up summer demand, ANA announced 2 flights of A380 Flying Honu (air seats of 520) on 8/9 & 8/13 from Narita. Also, JAL increased 2 additional flights in August and September. Airlift forecasts for summer: July (37 flights, 9,286 seats), August (43 flights, 11,098 seats) and September (41 flights, 10,282 seats)

- Airlines operations & suspension

Operation	Details
All Nippon Airways (ANA)	2 flights/week from Haneda until 10/31
Hawaiian Airlines (HA)	3 flights/week from Narita & 1 flight from Kansai (total 4 flights per week) until 9/30
Japan Airlines (JAL)	2 flights/week from Haneda until 9/30
ZIPAIR	Resume 1 flight/week from Narita starting 7/21
Suspension	

- Delta Airlines: Haneda until 10/31 & Kansai & Nagoya: until further notice
- Korean Air: until 8/31
- United Airlines: until 9/8
- AirAsia: Until further notice

- **Company Vaccination initiatives:** Both ANA (46,500 staff) and JAL (36,000 staff) started vaccination services to all employees in June. International related positions including pilot, flight attendants, ground staff will get vaccinated first followed by domestic service staff. ([source1](#))
- **Hawai'i promotion:** Hawaiian Airlines (HA) started campaign with Maui Brewing "Pau Hana in Maui" with Antenna America in Japan from June. 3 locations of Antenna America have provided 3 types of Maui Brewing Beers and Hawaiian food menu. Through this experiences, HA intended to increase Hawai'i travel desire and bookings for future. On 6/8, a media event was held and HTJ made a presentation on current Hawai'i updates and Mālama Hawai'i initiatives. ([source](#))

Market Intelligence/Market Conditions Impact on Hawai'i Travel

As of June 30, vaccination completion rate reached 9.68%. ([source](#)) The government stated by fall, vaccination for all Japanese citizens who are willing to take the vaccine will be completed. Even through travel conditions remain the same as previous months, many destinations expressed that Japan is important for their tourism recovery and allocated tourism budget. The travel trade industry is expecting the tourism restart in Japan from late fall and early winter. Also, Japan government's announcement of "Vaccine Passport" is encouraging the industry for rapid tourism recovery.

Leisure Activity Update

Consumer

- HTJ sent an email magazine to 373,633 consumers on 6/14 to announce that June is the environment month to think about "Mālama Honua". HTJ also introduced King Kamehameha Celebration in 2021, the current COVID-19 situation in Hawai'i, online seminars and programs that Hawai'i's NPOs offer in June, and Hawai'i specialist campaign to increase advanced-level specialists. HTJ's COVID-19 website had high percentage of clicks which shows consumers are interested in Hawai'i.
- For the 2nd phase of "Wear Aloha, Save Aloha", HTJ conducted SNS campaign from June 10th – June 24th to increase the exposure and awareness of the concept of Mālama Hawai'i by using Aloha Shirts, resulted in total 1,594 applicants with 186,760 impression.

SNS	Applicants	Impression
Facebook	142	17,764
Instagram	443	73,931
Twitter	1,009	95,065
TOTAL	1,594	186,760

- HTJ's "Our Islands" original video was created to promote Hawai'i's unique culture and similarities of culture and value between Japan and Hawai'i. "Our Islands" video is continuously streamed on digital signage at 75 stores of beauty salons in Japan, reaching impression of 48,000 in June.
- HTJ is preparing to launch a microsite to promote Polynesian Voyaging Society and its "Hōkūle'a" on 7/22, Ocean Day in Japan. HTJ supports Hōkūle'a's next voyage to the Pacific Ocean with the website to increase awareness and understanding of its activity.

- **Millennial initiative**

- **POOLO:** HTJ’s millennial initiatives with TABIPPO continued monthly activities with POOLO members. In June, 55 members participated and shared their final plan for a new-normal travel with the concept of “Mālama Hawai’i”. HTJ will be reviewing their ideas for implementation as a collaborated plan.
- **“Wakamono Kaigi”** (Young generation meeting): A PR company “Vector Inc” and one of Japan’s largest human resources companies, “My Navigation” launched “Wakamono Kaigi” to provide an opportunity for young generation students and professionals between age of 18- 29 to share and propose their ideas for various 6 companies including HTJ. Each group of participants will choose one theme from one company and compete by presentations in July. HTJ’s theme for participants is the idea of how to promote new normal travel to Hawai’i with “Mālama Hawai’i” mindset. The entry for this program started on 5/25, and the competition will start from July.

Aloha Program

- In June, there were 443 new Aloha Program members gained and 235 members took Hawai’i specialists courses. As of June 30, Aloha Program Hawai’i specialist members totaled 26,590 specialists (12,242 advanced, 4,437 intermediate, 9,147 beginners and 764 youth) and it registered total 62,516 Aloha Program Members.
- **Public Relation:**
 - Lighthouse Hawai’i for local Japanese communities on June 1st and June 16th introduced Aloha Program’s supported NPOs and King Kamehameha’s history with total circulation of 40,000.
 - Aloha Express (circulation: 63,000) introduced Hawai’i specialist test with a campaign running from 6/20 to 9/30. HTJ expects Aloha Express readers to become a member of Aloha Program to further learn about Hawaiian culture.
- **Education:** HTJ continued streaming bi-weekly live webinars for Hawai’i specialists through the Aloha Program. Topics of the webinars in June included history of King Kamehameha and traditional voyaging story of Hōkūle’a by crew, with total 249 Hawai’i specialists attended.
- **Information Distribution:** HTJ sent an email magazine to 44,975 members of Aloha Program on 6/24 which included the announcement of the upcoming webinars for Aloha Program members, Merrie Monarch Festival in 2021, Hawai’i specialist survey campaign, and online seminar information held by Hawai’i’s NPOs.

Public Relations

- **Media Exposures & Press Releases:**

Total June Media Exposures:

Exposure	Impression	AVE
157	6,541,748,596	\$7,115,818.50

HTJ made total of 31 media support and communication in June. There were 13 television exposures featuring Hawai’i.

- TV Asahi's Saturday Station had a great feature on Mālama Hawai'i initiatives by interviewing Hawai'i Tourism Authority's president and CEO, Mr. John De Fries. It also featured Hanauma bay nature preserve's improvement and restriction of visitors number. In addition, It featured Mālama aina tour of Kualoa Ranch.



- On June 25, the economic documentary program “Gaia no Yoake” featured O’ahu’s reopening strategy and state’s vaccination status as one of the good examples among the destinations.
- HTJ country director appeared on two radio shows, NHK Chikyu Radio (6/6) and J-WAVE’s Ethical Wave (6/19) to talk about Hawai’i’s environment and Mālama Hawai’i initiatives.

HTJ issued three press release generating 6,180,435,969 impression and \$431,520 AVE.

Date	Content	Coverage	Impression	AVE
6/9	King Kamehameha Day	33	1,629,887,811	\$130,200
6/23	Merrie Monarch Festival	36	3,210,807,811	\$141,360
6/25	Hawaii Tsushin Zemi	43	1,339,740,347	\$159,960

- **Media Newsletter:** HTJ prepared to distribute newsletter in July with the theme of Made in Hawai’i. The Hawai’i Made programs include Seals of Quality (Dept of Agriculture), Buy Hawai’i, Give Aloha (Department of Business and Economic Development), Made in Maui, and Kaua’i Made, and Farmer’s markets, House of Mana Up, and Pop Up Mākeke.

Consumer Event Activities

- **Aloha Festival Fukui 2021:** The event was held in Fukui prefecture on 6/6 with over 1,100 attendees. In the event, HTJ’s original video “Our Island” was screened and HTJ’s owned media including allhawaii.jp and Aloha Program were introduced during the event.



- **Beach Clean project at Shirahama 2021 (7/3, est attendees 160 pax):** Shirahama and Waikīkī Beach became Friendship beach in 2004 and last exchange was made in 2013. To reactivate the relationship, HTJ and Hawaiian Airlines endorsed the Beach Clean project held in Shirahama on 7/3. Aloha with the Beach Clean, HTJ participated the Friendship city relation discussion meeting connected Hawai’i via online. For the meeting, HTJ contacted City & County of Honolulu and acquired video message from the Mayor’s office of Culture and the Art (MOCA), Executive Director, Ms. M. Sala. This type of initiatives will continue to enhance the relationship between Honolulu and Shirahama.



- **Kyoto Takashimaya “Fresh Fun Hawai’i”** (July 28 – Aug 2, est attendees: 23,000 pax): Through the HTJ’s Mālama Hawai’i concept, the organizer will create eco-bag design of Hawai’i’s marine animals and sell at the event. The 50% of eco-bag sales will be donated to Japan Voyaging Society, a support group of Polynesian Voyaging Society’s Pacific Moananuiākea project in Japan. The Hawai’i themed eco-bag will be designed by local Japanese artists.
- **Hug the Earth Kamakura** (Sep 18–19 & Nov-2days, est attendees: 500 pax): HTJ has discussed with the event organizer of Hug the Earth Kamakura which event theme “Ocean Conservancy” and target millennials generation. HTJ encouraged the organizer to showcase Polynesian Voyaging Society’s Hōkūle’a and providing educational materials related Mālama Hawai’i.

Travel Trade Activities

- **Online Education:** HTJ is preparing new online education initiatives “Hawai’i Tsushin Zemi” which will start on 7/7. The press release was distributed on 6/25 to media, travel agencies, educational institutes, stakeholders. Total 43 media exposure with 1,339,740,347 impression, AVE\$159,960 were generated.
- **Wholesaler relations:** Major wholesalers are preparing tourism recovery for the fall. Product development & online tour briefing are aggressively conducted. Also, to polish the sales staff destination knowledge, wholesalers are providing staff education seminars. HTJ is requested to provide updates and assisting their training seminars.
- **Travel Trade website enhancement:** HTJ created the columns related to Hawai’i’s COVID-19, vaccination progress, visitor statistics, what’s new (including Kaua’i & Maui shuttle service), reaching 14,764 PV (+67.4% from previous month), UU 6,699.
- **Weekly Mail Magazine:** HTJ started distributing weekly email magazine starting from June. These email magazine contents are linked to the Travel trade member site. This effort resulted in more traffic to travel trade site and increased PV and UU. The email magazine was sent to over 9,000 member and the average open rate for June is 44.7%.
- **SNS reach:** On the Travel trade SNS, Twitter, total 45 post with 65,477 impression were generated in June.
- **Satellite office activities:**
 - Number of Aloha Program Satellite Groups remain same as previous month (total 145 group, 395 branches). With the lift of the state of emergency in major cities as of June 20 (except Okinawa), travel agents have placed more sales and promotions for 3rd quarter after Olympics.
 - Satellite office posts: In June, total 39 articles from Satellite office were posted.

Travel Trade Calls

Airline	Wholesaler/TA/TO/OTA	Other	Total
13	18	35	66

Partners Relations:

- **Made in Hawai’i event:** HTJ had initial conversation with Made in Hawai’i event organizer on how HTJ can promote the event in November.

- **Department of Agriculture:** HTJ requested for information on how the Seals of Quality program is impacting Hawai'i's economy and benefiting the businesses. HTJ also included info on Made in Hawai'i in media newsletter and owned media.
- **C&C Honolulu:** HTJ reached out to Ms. Sala who is in charge of Sister/Friendship City for C&C Honolulu to discuss strengthening the relationship between HNL and Japan cities. Also, HTJ acquired the video message from Ms. Sala for the Friendship city, Shirahama town, Wakayama for beach clean projects held on 7/3, 2021.
- **Mālama Hawai'i:** HTJ continued website development collaboration with Hawai'i stakeholders. In the month of June, HTJ created JAL's sustainability initiatives and working on new columns with JCB, Hilton Grand Vacation, Trump International and Kahala Hotel (posting in July).
- **Aloha Ocean Plus:** HTJ added new NPOs that are actively working on beach cleaning to preserve ocean environment on Mālama Hawai'i website in June.
- **Kaua'i Museum:** HTJ received a new video from Kaua'i Museum and shared on Mālama Hawai'i website to introduce the museum to Japan market.
- **Production company in HIFA:** HTJ communicated with 2 major local production companies for Japan that are part of HIFA to find out media trend and inquiries they are receiving and how they are working together with the TV stations to film virtually. HTJ will continue to communicate and exchange information.

Responsible Tourism Update

Hawaiian Culture

- **King Kamehameha Celebration:** HTJ communicated with King Kamehameha Celebration Commision to obtain information about the streaming program to include in the press release and owned media (allhawaii website, Aloha Program website, Facebook Twitter, and Instagram). HTJ announced and introduced the historical important day and its private online ceremony via HTJ's owned media, SNS, and email magazines. On 6/11, HTJ also conducted a webinar on Aoha Program to share the unique Hawaiian history and culture.

Platform	Reach
Facebook	26,085
Instagram	66,239
Twitter	52,858
Email Magazine	418,668
Allhawaii.jp	267,401
Aloha Program	171,521
TOTAL	1,002,772



- **Merrie Monarch Festival:** Introduced Merrie Monarch and its livestream information on HTJ's owned media (allhawaii.jp, Mālama Hawai'i website, and Aloha Program), SNS, and email magazines, with total reach of 1,364,974.

Platform	Reach
Facebook	94,159
Instagram	105,141
Twitter	87,397
Email Magazine	836,147
Allhawaii.jp	267,401
Aloha Program	171,521
TOTAL	1,561,766



- **'Iolani Palace:** HTJ introduced the Friends of 'Iolani Palace's 55 years anniversary virtual event on HTJ's owned media (allhawaii.jp, Mālama Hawai'i website, and Aloha Program), SNS, and email magazines with total reach of 936,754.



- **Mālama Hawai'i website update:** On World Ocean Day on 6/8, HTJ created a column to share the current situation and problems we are facing on the beach and in the ocean, and what we can do to preserve ocean environment. HTJ also share the movie of "Share the Aloha" to introduce the needs to protect ocean and marine animals.
- **Pop-up Mākeke:** HTJ reached out to Pop up Mākeke for their resources and information to include in the newsletter. Also added the information on owned media to promote their pop up starting from 7/1.
- **Surfing in Hawai'i:** 2 surfing related columns "World Ocean Day" and "International Surfing Day" added in Surfing site to share the messaging of the importance of ocean conservation and Hawai'i beach clean project by Surfrider Foundation.
- On 6/10, HTJ promoted and livestreamed Honoka's ukulele live concert by Propeller USA on HTJ's facebook with total viewers of 3,591.

Natural Resources

- On June 8th, the World Ocean Day, Lanai Transit Hawai'i started ocean preservation project with Sustainable Coastlines Hawai'i support. Part of the profit from Lanai Transit Hawai'i's new eco bags will be donated to Sustainable Coastlines Hawai'i, and the collaboration will be continued in the future by conducting beach clean event together in Hawai'i. Their collaboration is introduced on HTJ's Mālama Hawai'i website.
- On 6/5 "Environment Day", HTJ shared columns on Mālama Hawai'i website to introduce what and how each of us can contribute to preserve the environment in daily life. HTJ also shared "Protea" shops as one of Hawai'i's example of sustainable shops that contributes "Zero waste".
- Aloha Express, one of Japan's well-known Hawai'i media, introduced Hawai'i's contribution toward Aloha+ CHALLENGE in 2 pages, with reach of 63,000.

Community

- **Support Hawai'i Project:** Bishop Museum's online program membership for 15 people for those who had donated to Bishop Museum in February. This is to provide an opportunity for them to learn more about cultural and historical contents of Hawai'i and lead them to become Pono travelers who understand and have deep knowledge of Hawai'i.

Island Chapters Engagement Update

- **Hawaiian Islands message distributions:** On each SNS, HTJ introduced the beauty and attractiveness of O'ahu, Island of Hawai'i, Maui, and Kaua'i.

Islands	Reach	# posts	Featured contents
O'ahu	663,453	26	i.e. - Friends of Iolani 55 years of anniversary virtual event - Iolani Palace's talk session "Dining with the King"
Island of Hawai'i	159,048	7	i.e. - King Kamehameha's birth place quiz - Merrie Monarch Festival
Maui	93,262	4	i.e. - Maui's flower, Lokelani rose - Mythology of Maui
Kaua'i	105,280	3	i.e. - Virtual tour of Kaua'i Museum - Kaua'i's great nature on "Environment Day"

"Coming Attractions" for Leisure Market

What	When	Where
Aloha Program webinar (Hawaiian Birds)	7/2	Online
Instagram Live with Hulalea	7/3	Online
Hawai'i online seminar Vol.1	7/7	Online
Hawai'i online seminar Vol.2	7/21	Online
Hawai'i Promotional Committee Japan	7/15	Online
Travel Agent online webinar (Expedia TAAP)	7/16	Online
TPI webinar	7/16	Online
Aloha Program webinar (Surfing)	7/16	Online
JHTA meeting	7/21	Online
Hökūle'a Website Launch	7/22	Online
JATA	7/30	Hybrid

Hawai'i Tourism Canada

2021 Monthly Leisure Marketing Report – June

Market Intelligence/Market Conditions

Economy

- The Canadian economy has already recovered nearly 80 per cent of the jobs lost during the severe recession last year. But jobs for lower income Canadians remain well below pre-pandemic levels. This unwelcome development could persist through the medium-term as some positions – for instance, in bars and restaurants – could be permanently lost.
- Large federal fiscal deficits will persist through the medium term although they will slowly decline. New spending initiatives – including the federal government's plan to implement a national childcare program – will maintain upward pressure on expenditures.
- A sharp rebound in household spending over the near term is due to households starting to spend some of the huge savings built up over the course of 2020 and the first part of 2021. The composition of spending will change as households will spend less on goods and more on services like travel.
- Canada's economy is projected to expand by 6.7 per cent this year and 4.4 per cent in 2022. This represents an upgrade from the spring update and partly reflects the generally successful rollout of vaccines that has led to a gradual reopening of the economy and a boost in confidence.
- The loonie continued to gain strength during the first six months of 2021, reaching an average of US\$0.80, a 9.1 per cent increase over 2020.

Outbound Travel Market

- Overall, 621,000 trips were recorded throughout the first four months of 2021, compared to 8 million in 2020, and 11.5 million in 2019. Compared to January-April 2019, overseas activity has declined 94 per cent so far in 2021, while transborder trips have fallen 96 per cent. The 2020-2021 winter travel season (November-April) saw 961,000 Canadians take an outbound trip, compared to 12.8 million in winter 2019-2020. Of the recorded activity, 55 per cent of trips were to overseas destinations, a larger share than recorded throughout the same period in 2019-2020 (44%) and 2018-2019 (43%).
- More than 82,000 Canadians returned from an overnight transborder trip in April 2021. This was a similar volume as recorded in the months prior to the implementation of the mandatory quarantine measures but reflects just 4.5 per cent of pre-pandemic volume. Compared to 2019, overnight auto trips have declined 95 per cent so far in 2021, while travel by other modes has decreased 96 per cent.

Competitive Environment

- Destinations in the Caribbean, Mexico, and Central America recorded a 97 per cent decline in activity throughout the first four months of 2021. There were just 71,000 arrivals registered during the period, with visits to Mexico accounting for 55 per cent of activity. With almost all air service cancelled in January, the 2020-2021 winter travel season saw 3.1 million fewer arrivals from Canada (-95%).
- The first four months of 2021 saw 35,000 Canadian arrivals in the Asia-Pacific region, a 95 per cent decline compared to 2020, and a 98 per cent drop over 2019. The overall occupancy rate for the period was 15.8 per cent in Thailand, 53 per cent in Hong Kong, and 43.9 per cent in Singapore. The 2020-2021 winter season saw 63,000 arrivals in the region, compared to almost 1.38 million in 2019-2020 (-95%).

Consumer Trends

- Consumer confidence rose again in June as vaccinations ramped up and provincial economies began to reopen once more. After increasing by 6.5 points in May, the index jumped a whopping 21.3 points in June to reach 119.7, which is within one point of the pre-pandemic rating in February 2020 (120.6).

Travel Trends (direct to Hawai'i)

- The first five months of 2021 saw almost 5 thousand Canadian visitors. 60 per cent of these arrivals occurred in January, before increased travel restrictions were implemented.
- So far in 2021, direct arrivals have declined by 98% and indirect arrivals have fallen 93%
- Jan-May 2021 saw indirect arrivals decline by 93% compared to 2020.
- Fewer than 2,000 indirect arrivals were counted during the period, compared to almost 29,000 in 2020 and more than 60,000 in 2019.
- Independent travellers represented 96 per cent of all visitors so far in 2021, a much higher share than previous years.
- During the period, 4,600 independent travellers were counted down 97 per cent, while package trip volumes fell 99 per cent.
- Compared to 2020, stays in hotels (-97%) registered a smaller decline than stays in condos/timeshares (-99%) and rental homes (-99%).

Media Trends

- NLogic brings Adgile's real-time TV monitoring to Canada; The technology will allow brands to measure total TV targets of ads and brand integrations across platforms.



Australian adtech company Adgile is extending its technology to Canada through a new partnership with data technology company NLogic, allowing brands to get real-time insights about how ads and brand integrations are performing across traditional and on-demand TV.

The partnership will bring Adgile's visual AI-enabled analytics, attribution and activation product and cloud-based performance management platform outside of Australia for the first time.

NLogic, already a provider of audience analysis software and data integration services for the broadcast and advertising industry in Canada, will add real-time data and analytics capabilities for linear and on-demand TV through the new partnership.

Consumption is changing to be multi-platform, says David Phillips, president and COO of NLogic, and Adgile has the ability to go beyond linear broadcast by also monitoring VOD through total TV targets. "Our objectives are improving broadcast excellence moving across platforms, and partnership with Adgile will help us do so," Phillips added.

The unique technology, he explains, will monitor over 150 stations in Canada, covering linear, VOD and other streams. The unique tech watches the streams, identifies the brands, content, ads and elements within the ad, and creates metadata in real time, instead of looking at someone else's.

"This technology is not dependent on someone's logs, it's literally watching a stream of images," says Phillips. "At four images per second, that is 70 million images a day."

The technology can pick up sponsorships, brand integrations and content integrations. A brand can see their spots, integrations and sponsorships, and what that does for it and its competitors. Brands can also use the real time attribution for web activity, as it can be integrated into Google Analytics, to help better understand if and when broadcast ads impact web traffic.

“It’s basically bringing more knowledge in real time about the effectiveness of TV advertising, both for linear ads and branded integrations, ” adds Phillips.

- Study: Newcomers to Canada consume a lot of media

Brands need to take a multi-channel and multilingual approach to reach new Canadians, according to the latest Newcomers to Canada 2021 study from Solutions Research Group (SRG).

The study indicates newcomers spend more time on laptops, personal computers and mobile devices than traditional forms of media, and although they’re less likely to consume TV or radio in terms of number of hours, the weekly reach levels were still high at 85% and 68% respectively – close to the reach levels for the general population of Canada for those channels.

When asked about their viewing and listening habits in the past week, 61% of newcomers to Canada indicated they had read newspapers in print or online in English, French or multilingual media.

Kaan Yigit, president and research director, SRG, says, “The biggest takeaway for me looking at the results is the importance of a multi-channel and multilingual approach to this really important market segment. Only digital or traditional would miss the boat, so would English- or French-only advertising. Instagram or Facebook alone would not work as well as something that crosses multiple social feeds.”

Looking at language preferences at home or when watching TV, for example, 82% says they speak a language other than English at home. Chinese and South Asian newcomers in particular are watching more TV in-language (61% and 55% respectively).

The demographics of newcomers, says Yigit, shows they are younger than the overall Canadian population and typically live in larger, multi-generational households, often resulting in having more kids in the home. According to the report, 54% of newcomer households in Canada have a child under the age of 18 in the home, versus 30% of average Canadian households.

The study found that newcomers used the Internet in general on a PC or tablet for 2.6 hours in an average weekday, and used mobile phones for browsing, streaming, or gaming for 2.5 hours. They watched or streamed TV shows (whether live, on demand, on regular TV or via the Internet) for about two hours a day, and listened to the radio at home, in a vehicle, at work or elsewhere for just over one hour.

CBC, CTV, and Netflix were the top three video/TV sources mentioned by newcomers on an unaided basis in the last week. They were the only three sources to hit double digit mentions. CBC was the top video/TV source among Filipino and West Asian newcomers. CTV took the top spot among Chinese newcomers, while Netflix was ranked number one among South Asian newcomers.

The top in-language TV channels for Chinese newcomers were Fairchild and OMNI. They were TFC and GMA Pinoy TV for Filipino newcomers and Sony and Zee TV for those from South Asia.

Newcomers were more avid users than the general population of various social media, video, and messaging apps. YouTube, Facebook, WhatsApp and Instagram were the top four, and WhatsApp use was two times higher than with the general population. Chinese newcomers in particular used social media apps that no one else did, such as WeChat.

Newcomers lean towards subscription-based streaming video services, with Netflix and Amazon Prime Video popularity aligning with the general population in terms of weekly use at 64% and 37% respectively. Major Chinese and South Asian streaming services such as Tencent, iQIYI, Hotstar and IPTV India were also popular among newcomers from these backgrounds.

The Newcomers to Canada study is an independent syndicated research study conducted in March and April 2021, covering newcomers (850 online interviews) with South Asian backgrounds, Chinese backgrounds, Filipino newcomers, West Asian, Arab and Persian newcomers and Latin and Central American newcomers, which account for a vast majority of immigration to Canada. Respondents had to be 18 years of age and older and had to have arrived to Canada no later than 2015 and currently living in one of the following census metropolitan areas: Vancouver, Calgary, Edmonton, Toronto and Montreal.

Airlift

- There were 14,000 direct seats offered so far in 2021, compared to 183,000 in 2020 and 290,000 in 2019. After offering seats in January, Air Canada suspended service reducing capacity by 95 per cent. At the same time, WestJet offered 11,000 seats, a 91 per cent reduction compared to 2020.
- Carriers are currently offering close to 161,000 seats throughout the second half of 2021, of which 82 per cent are scheduled for Q4. This is 8 per cent fewer seats than available last year and represents about one-third of the service offered in 2019 (-64%).
- With travel activity not expected to pick up until much later this year, total visitation is currently projected to reach 148,000 arrivals, a little more than one-quarter of the volume registered in 2019 (-73%).

Market Intelligence/Market Conditions Impact on Hawai'i Travel

- All international flights landing in Canada are being funnelled to Toronto, Montreal, Calgary or Vancouver. Anyone arriving in Canada will need to have a negative PCR test within 72 hours of their scheduled departure to Canada and must show the results to their airline before they board their flight. Travellers will also need to submit their contact details, a COVID-19 symptom self-assessment and quarantine plan, electronically, before boarding their flight, through the new ArriveCAN app.
- Incoming passengers must wait at a "supervised hotel" until their test results come back negative, at their own expense, roughly \$2,000 per person which is expected to be up to 3 days. With a negative test result, travelers will wait out the rest of their quarantine at home, under "significantly increased surveillance". In the event of a positive test result, travelers

must go to “government facilities” in an effort to determine if the strain is one of the new variants.

- Effective July 5th, citizens and permanent residents who've had a full course of a COVID-19 vaccine approved for use in Canada can skip the 14-day quarantine. Eligible air travellers also no longer have to spend their first three days in the country at a government-approved hotel.
- Restrictions barring all non-essential trips between Canada and the United States, including tourism, will remain in place until at least July 21. Prime Minister Justin Trudeau said the easing of the rules marks a “big step” toward re-opening the border.
- Unvaccinated children travelling with fully vaccinated parents won't have to stay in a hotel, but will have to follow testing requirements and depending on their age, isolate for 14 days after arrival in Canada. Minister of Health Patty Hadju said the new rules would “undoubtedly” be challenging for families who want to travel.
- As of June 10, more than 27,427,893 doses of approved COVID-19 vaccines have been administered across Canada. 30,498,498 doses have been distributed to the provinces, Canada's inoculation rate is 13th amongst countries with a population of one million or more people. Canada's chief medical officers said the country should seek to administer second COVID-19 vaccine doses as soon as possible as inoculation supply rises and variants spread.
- Canada's National Advisory Committee on Immunization (NACI) has changed its guidelines to allow for mixing and matching COVID-19 vaccines. A first dose of the AstraZeneca-Oxford vaccine can be followed up with a second AstraZeneca shot, or be safely combined with a second dose of the Pfizer-BioNTech or Moderna shots “unless contraindicated.”
- New modelling shows that restrictions could be lifted when 75 per cent of adults have received their first vaccine dose and 20 per cent have received their second dose of a vaccine. When that scenario is reached, restrictive measures could be gradually eased.
- Canada may require international travelers to prove they were vaccinated against COVID-19 before they can enter the country, Trudeau said. The federal government will align its policy on whether it will require travelers to provide a vaccine certification with its international allies.
- Canada's largest airlines are renewing their call for a clear plan from Ottawa on resuming international travel after the European Union moved to reopen for vaccinated tourists. The National Airlines Council of Canada lauded the EU for its “science-based approach” and says the federal government should outline a similar plan.
- COVID Travel Insurance - Many Canadian insurance companies now offer Emergency Medical policies that include additional coverage for COVID-19 and related conditions for Canadian Residents. For a full list of tour operator policies and pre-existing condition clauses. Most major Canadian travel insurers will not cover the cost of the new government-mandated COVID-19 tests for travellers looking to re-enter the country.
- More aid is coming to travel agencies and small tourism businesses, courtesy of the Ontario government's just-announced \$100 million grant. The Ontario Tourism and Travel Small

Business Support Grant will provide one-time payments of \$10,000 to \$20,000 to support eligible small tourism and travel businesses struggling to recover from the impact of the pandemic.

Leisure Activity Update

Consumer

- Air Canada: After the announcement of the winter schedule and increased number of seats and routes, HTCAN has been negotiating a cooperative campaign with the airline.
- Air Canada Vacations: HTCAN has been in contact with the tour operator to resume the promotional campaign that was paused at the beginning of the year. HTCAN is looking at the possibility of including the Mālama videos on the ACV website as well as the inflight service.
- WestJet Vacations: HTCAN has been in contact with the tour operator to resume the promotional campaign that was paused at the beginning of the year. HTCAN is looking at the possibility of including the Mālama videos on the inflight service.
- HTCAN was able to give a consumer-focused webinar with Kaz Custom Travel, a Virtuoso Agency dedicated to women in travel, giving an overview on Hawaiian culture, the essence of each island, and the Mālama program.

TOP PERFORMING POSTS FOR THE MONTH – INSTAGRAM:

POST IMAGE	POST TEXT	IMPRESSIONS	ENGAGEMENT ▼	APPLAUSE	AMPLIFICATION	CONVERSATION	POST CLICKS
	Off the grid. 🌊 #VisitIslandofHawaii	2,463	156	151	0	2	0
	"The water was glassy and calm, still candy-colored in the afterglow of sunset." - Stephen King #VisitMaui	985	115	113	0	0	0
	Bird's eye view of the highest sea cliffs in the world. 🏝️ #VisitMolokai #LetHawaiiHappen	1,065	104	100	0	4	0

TOP PERFORMING POSTS FOR THE MONTH – FACEBOOK:

POST IMAGE	POST TEXT	IMPRESSIONS	ENGAGEMENT ▼	APPLAUSE	AMPLIFICATION	CONVERSATION	POST CLICKS
	Kona Coast lounging Off the grid. 🌴 #VisitIslandofHawaii www.gohawaii.com/islands/hawaii-big-	3,602	297	107	8	8	174
	Sunset Infinity Pool (Maui) "The water was glassy and calm, still candy-colored in the afterglow of sunset."	5,589	275	161	16	9	89
	UGC: Snorkelling (Maui) A whole new world under the surface. 🌊 #VisitMaui	15,170	156	91	6	6	53

TOP PERFORMING POSTS FOR THE MONTH – TWITTER:

POST IMAGE	POST TEXT	IMPRESSIONS	ENGAGEMENT ▼	APPLAUSE	AMPLIFICATION	CONVERSATION	POST CLICKS
	Kona Coast lounging Off the grid. 🌴 #VisitIslandofHawaii www.gohawaii.com/islands/hawaii-big-	N/A	49	15	6	0	28
	Sunset Infinity Pool (Maui) "The water was glassy and calm, still candy-colored in the afterglow of sunset."	N/A	36	19	3	1	13
	Mokapu Island Aerial View (Molokai) Bird's eye view of the highest sea cliffs in the world. 🌋🏔️ #VisitMolokai	N/A	33	12	5	1	15

Note: The bolded text under 'post text' was not deployed.

Travel Trade

HTCAN secured free promotional and educational opportunities due to HTA's request to stay at fixed costs for the first half of 2021.

- Hotelbeds.com Campaign: HTCAN was able to secure free of cost an educational campaign with Hotelbeds.com in their Canadian website. This campaign ran in May and June.
- Outgoing reach to set up upcoming training sessions with travel agencies across the country.
- Proactively working on sharing information regularly with the tourism industry and listening to Travel Advisors' feedback about consumer behavior and booking trends.

Public Relations

- Proactive and reactive pitching to media partners upon consultation with HTA. Pitching themes include virtual experiences for families during summer break to keep Hawai'i top of mind.

- In regular conversations with media to ensure they are updated on all regulations and safety protocols pertaining to COVID testing.
- Spoke with a number of media for potential visits in 2022. A number of journalists would like to start planning for a visit in Q1 and Q2. Discussing potential story angles and shortlisting islands to visit.
- Press release with WestJet’s increased capacity to Hawai’i and new routes for the Winter season.

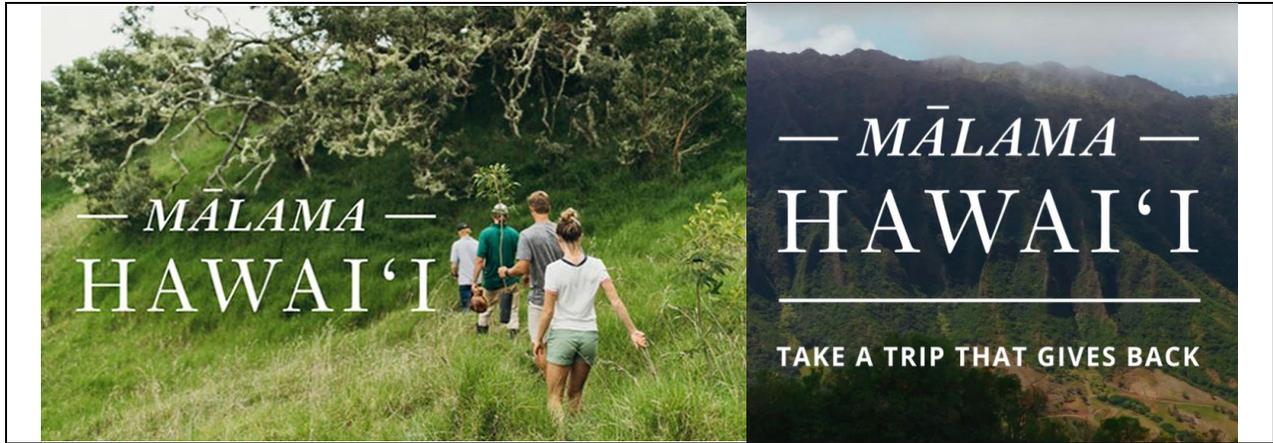
Travel Trade Activities

Travel Trade Calls			
Airline	Wholesaler/TA/TO/OTA	Other	Total
6	25	0	31

- Travel demand for Hawai’i is continuing to rise among Canadians. HTCAN has received frequent emails and phone calls with inquiries about their upcoming trip to Hawai’i in the fall. There has been an increase in enquiries, Canadians are not nervous anymore about committing to a holiday with the continued ramp-up of international travel. Fully Vaccinated Canadians are eagerly awaiting an opportunity to return to Hawai’i.
- Optimism breaks out around the country as the Hawai’i air seat capacity recovery is underway. WestJet announced a significant growth to its Hawai’i network, featuring more Dreamliner flight options from Western Canada to Maui and new non-stop service from Calgary to Kona and Līhu’e this winter. WestJet is adding a new weekly non-stop service from Calgary (YYC) to Kona (KOA) and Līhu’e (LIH) beginning in December. With the addition of the new service, WestJet will offer service to four Hawaiian destinations non-stop from Calgary and two from Edmonton. WestJet will also add 787 Dreamliner service from Calgary and Vancouver to Kahului, Maui (OGG) with 13 weekly flights.
- Travel agencies have seen an increase in bookings, inquiries to the Hawaiian Islands as vaccination rates climb in Canada. Travel Advisors report an upswing in inquiries and bookings, as people make plans in anticipation of restrictions being lifted. Many travel advisors have requested a list of inbound tour operators from HTCAN so they can contact them to create itineraries that include transfers, activities, and experiences. HTCAN worked in partnership with the Island Chapters to create this list.

Responsible Tourism Update

- Mālama Hawai’i Campaign
The Mālama Hawai’i campaign continues to be the main focus of HTCAN’s efforts to promote sustainable tourism and volunteer opportunities.



- An effort has been made to create awareness in the travel advisors to pass along the message to their clients about visitors being respectful of the communities, traditions, environment, etc. when visiting Hawai'i.
- HTCAN is discussing with both Canadian carriers the possibility of using the Mālama videos on their in-flight entertainment system.

Island Chapters Engagement Update

- HTCAN has regularly scheduled meetings with the Island Chapters. The design of the social posting calendars has been sent for their approval. HTCAN has also been working with the IC to put together its quarterly newsletter.
- HTCAN will reach out to the Island Chapters to schedule the Spoiled Agent webinars as part of its travel trade educational campaign.

“Coming Attractions” for Leisure Market

What	When	Where
Educational campaign with Spoiled Agent	August to January	Canada-wide
Digital advertising campaign	August to October	Canada-wide
Air Canada coop campaign	August to September	Canada-wide
Air Canada Vacations campaign	TBD	Canada-wide
WestJet campaign	September to October	Canada-wide

Hawai'i Tourism Oceania 2021 Monthly Leisure Marketing Report – June

Market Intelligence/Market Conditions

Economy

Australia & New Zealand

What a difference a month makes in this challenging pandemic environment. In May, Hawai'i Tourism Oceania was reporting about the Trans-Tasman quarantine-free travel bubble providing a much-needed boost for tourism in the region. Unfortunately, an outbreak featuring the Delta variant has proven much more difficult to ring-fence and has led to a lock-down situation in the state of New South Wales. While travel has been subsequently restored between other Australian states and New Zealand, there has definitely been a hit to the recent successes.

On the positive side, the recent outbreak has put a huge amount of pressure on the Australian government to increase the vaccination rate. Earlier supplies of the Pfizer vaccine have been urgently requested. Australian Prime Minister, Scott Morrison, also announced a four-phase vaccination roadmap out of coronavirus pandemic. While there was no specific timeline identified, it does provide a framework and a plan to return to international travel. Associated with this, it was announced that a home quarantine trial will begin in the next few months. Medical experts will also consider whether to shorten the quarantine period of vaccinated people.

In New Zealand, the arrival of vaccinations is also increasing in July which will see 1 million vaccination shipments. The country is still on track to have the majority of the population vaccinated by the end of the year. This coincides with Air New Zealand announcing a plan to return airline schedules to selected cities in November – including Honolulu.

On the currency side, the recent COVID-19 hiccup has seen a 2 cent reduction in value for both currencies against the US Dollar. The month ended at the following rate (AU\$1.00 = US\$0.75 and NZ\$1.00 = US\$0.70).

Outbound Travel Market

Australia & New Zealand

HTO received some very positive news during the month in the form of the announcement by Air New Zealand of the planned re-start of their Auckland to Honolulu flights. Subject to the easing of border restrictions, Air NZ will commence 3 flights per week in November.

Competitive Environment

Australia & New Zealand

The majority of the consumer advertising spend at present, seems to be centered around Australia, New Zealand, Cruising and Cook Islands (for NZ).

Travel Trends (Both general and those specific to Hawai'i)

Australia & New Zealand

It has been interesting to see the resurgence in interest in cruising and coach touring. Australia and New Zealand based tour operators have reflected good demand and bookings for 2022.

Airlift (Specific to Hawai'i)

Australia & New Zealand

As mentioned previously, the most positive news of the month was the Air New Zealand announcement of Auckland to Honolulu flights commencing November. These are now in the reservation system with 3 flights per week to choose from.

Market Intelligence/Market Conditions Impact on Hawai'i Travel

Australia & New Zealand

- Travel trade partner Luxury Escapes, has announced that it will give away \$200 international travel vouchers to fully vaccinated Aussies. This reflects the big push by the tourism industry around moving things forward in terms of the vaccination rollout.
- Related to this program, and the Australian Government's Roadmap reveal, Flight Centre has released their own roadmap recommendations for the government. These are much more specific action items and have timings associated with them. Flight Centre released their Roadmap via some select consumer advertising placements.

Leisure Activity Update

Consumer

Social media content calendar: HTO continues to build momentum on Social Media. Posting 2-3 posts per week and gradually building momentum and increasing post frequency over the next few months. The posts have generated a significant amount of engagement.

Travel Trade

- **Visit USA Australia** – HTO has been re-elected as a member of the Visit USA Australia executive committee. This provides an excellent voice and presence for Hawai'i amongst the other US RTO's, activity and transport providers.
- **Visit USA New Zealand** – HTO is also a member of the Visit USA New Zealand Executive Committee and spent a busy month helping to organize the Independence Day New Zealand virtual roadshow. More details will be reported in the July report.

Public Relations

HTO continues to maintain relationships with the trade and consumer press and also assist with destination and industry information where relevant and appropriate. While consumer media coverage has tended to be more locally focussed, we have seen good pick-up of industry news in the travel trade press,

Travel Trade Activities

Travel Trade Calls			
Airline	Wholesaler/TA/TO/OTA	Other	Total
2	2		4

Meetings with the following partners: Air New Zealand; Hawaiian Airlines; House of Travel; and Vintage Sport.

Responsible Tourism Update

HTO has begun to communicate the Mālama Hawai'i concept and initiative into the local market. One of the first such opportunities to showcase the initiative is via the Visit USA Independence Day Virtual Roadshow in New Zealand.

Island Chapters Engagement Update

HTO continues to liaise with the IC's as required.

"Coming Attractions" for Leisure Market – July

July 6th: Visit USA NZ Hybrid Trade event

July 21st: Visit USA AU Hybrid Trade event

HTO will continue to provide market intel and continue liaison with key trade, media and political partners. HTO continues to produce 'evergreen' content in preparation for activation of the recovery marketing plan, including the implementation of a social media calendar.

Hawai'i Tourism Korea

2021 Monthly Leisure Marketing Report – June

Market Intelligence/Market Conditions

Economy

- Korea's economic growth rate will reach 4.0% this year, up 0.8% points from last year's November forecast of 3.2%. Predicting 3.8% and 4.1% in the first and second half of this year respectively, it is expected for exports and private consumption to lead the growth.
- The composite consumer sentiment index came in at 110.3 in June, up 5.1 points from the previous month and the highest level in almost 3.5 years. This is due to the faster vaccination than expected, continuing strong exports and the increase in employment.
- Korea's status was upgraded from a developing country to a "developed" country by the United Nations Conference on Trade and Development (UNCTAD). It's the first time UN upgraded a country's classification from developing to developed since its establishment in 1964. Korea has been moved from Group A, which consists of Asian and African member countries to Group B, which consists mostly European countries, the U.S., Japan and Australia.
- The average USD/WON exchange rate in June was 1,122.43 won, slightly appreciated from the previous rate of 1,123.37 won in May.

Outbound Travel Market

- The number of outbound travelers from Korea in May recorded 75,416, 99.5% year-on-year increase.

Competitive Environment

- The Korean government announced a more detailed plan for the travel bubble expected to be effective from July. In the early stages of the travel bubble, it will be allowed only for:
 - Group travels for those who have completed full vaccination
 - 1-2 flights per week and up to 200 people per flight
 - Designated airports for both countries, Incheon International Airport from Korea
 - Direct flights from national carriers.
- Guam announced to exempt quarantine to all international travelers from July 4 when submitting PCR negative result issued within 72 hours of arrival.

Consumer Trends

- According to the finance ministry, South Korea's domestic demand is extending an improving trend as retail sales and consumer sentiment gained ground amid an economic recovery. The domestic use of credit cards grew 6.8 percent in May and sales at department stores rose 17.3 percent last month.

Travel Trends

- Anxiety against travel has decreased by large number. Compared to last year, 35% said anxiety decreased as social distancing in daily life has been settled down and vaccination has widely taken place. Regarding the travel plan this summer, 97% answered that they will travel, and 70% of

those respondents mentioned “recharge” as the main travel purpose. (Source: Good Choice, no. of respondents: 1,980)

- Overseas travel products aimed for Korean Chuseok (Thanksgiving) holiday showed a high booking rate with the government expanding the travel bubble and travel agencies applying flexible cancellation policies. KAL Tour reached 70% reservation rate for Hawai'i, and Interpark achieved 112% and 138% travel funding for Guam and Taiwan respectively. Saipan is triggering its product sales as it became the first travel bubble destination with Korea.

Media Trends

- The number of video content evaluated by the local media rating authority increased more than 80 percent in the first half of this year from a year ago amid the protracted novel coronavirus pandemic according to the Korea Media Rating Board (KMRB). The yearlong COVID-19 pandemic led to an increase in the production of TV series and original content by global streaming services like Netflix.

Airlift

- Korean Air plans to operate 2 charter flights for ICN-HNL route (KE053) during the Chuseok period on 17th and 20th of September.
- Asiana Airlines plans to operate 2 charter flights for ICN-HNL on 17th and 21st of September.
- Hawaiian Airlines plans to increase to three weekly flights (HA 460) from ICN to HNL starting August.

Market Intelligence/Market Conditions Impact on Hawai'i Travel

- Travel agencies are resuming their mass media advertising and marketing as the summer peak season starts, and overseas travel becomes more visible. Agents focused more on stimulating consumers' travel sentiment, re-branding the company, and showcasing their promotions by launching large-scale TV advertisements targeting the vaccinated citizens.
- Following the Korean government's recent announcement to exempt quarantine to vaccinated overseas arrivals regardless of nationality, now the number of PCR tests upon arrivals reduced from 4 to 2 times, one before entering Korea and the other one on the 6th or 7th day after entering Korea, for those who have completed vaccinations in Korea. Compared to the fact that arrivals had to undergo 3 additional PCR tests after entering the country regardless of vaccinations or negative PCR test results, this will play vital role in reducing psychological barriers to travel abroad.
- A local travel trade daily media, Travel Daily, has analyzed that based on the pre-pandemic travel demographics, about 4 million Koreans from 20s to 50s will be able to travel internationally in September without quarantine after completing two doses of vaccination.
- The launch of eased social distancing scheme will be put off during July and consumer sentiment has again become rather cautious for the time being.

Leisure Activity Update

- **HTK COVID-19 Crisis Management:**

- **Pre-PCR Test Program:** The agreement between the state office and ICN Covid-19 Test Center has been finalized and will be effective starting July 15. HTK is keep following up with Korea University Hospital and also waiting for Koshin University in Busan to submit the agreement.

Consumer

- **Consumer Promotion with Everland:** In partnership with Caribbean Bay, the biggest water theme park, HTK is developing consumer co-op promotion starting July conveying Mālama Hawai'i. HTK will conduct onsite consumer grand prize event from July 11 to August 22 to increase social engagement targeting active outdoor leisure lovers who have visited Caribbean Bay. Multiple banners are placed on the event site educating the consumers on the Hawaiian Islands and also, Mālama Hawai'i in localized message to care for Hawaiian culture, natural ecosystem and community. On the banners, a QR code linking to Mālama Hawai'i video post on HTK social channel is embedded to increase reach and impression. In addition, to engage with exiting followers of HTK social channels and also to increase the number of followers, HTK will carry out separate prize event on owned social channels. Lastly, another online prize event is taking place on Caribbean Bay's official website with the 1st prize sponsored by Ala Moana Hotel by Mantra.



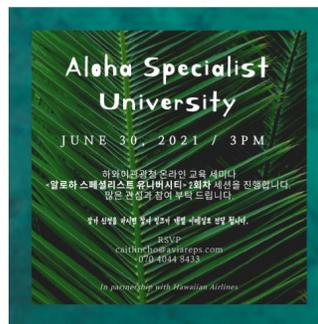
- **HTK Social Media Channels:** HTK uploaded 9 social media posts under the theme of virtual travel to dynamic Hawai'i to capture the Korean consumers' pent-up demand to travel abroad under the hash tag #VirtualTraveltoHawaii. Also, with sharply growing sales for honeymooners, HTK uploaded 1 posting to suggest going on honeymoon to Hawai'i. HTK has received approval on the July social calendar with the theme of Mālama Hawai'i and now developing social calendar for August.



- **B2B English Newsletter Distribution:** HTK distributed B2B English newsletter in June to industry people on Hawaiian Islands to share updates of Korean market and TTP agreement with Incheon Airport COVID-19 Test Center.
- **Inquiry on Pre-PCR Test Program:** HTK has been receiving numerous inquiries from Korean consumers on Pre-PCR Test Program and providing appropriate guidelines via phone calls and emails.

Travel Trade

- **Aloha Specialist University Program (ASU):** HTK has successfully held its 2nd ASU on June 30 inviting 33 industry partners including key travel agencies, airline partners and trade media. The 1 hour program covered current Covid-19 updates on Hawaiian Islands, latest TTP program and safe travel information and also highlighted Mālama Hawai‘i campaign showing the newly launched videos developed by HVCB. The program also featured responsible/voluntourism activities in Hawai‘i.



- **Airline Co-op with HA:** HTK has been in discussion with HA to launch a mālama Hawai‘i themed promotion in July however due to HA HQ’s direction, the initiative is on hold as they are planning to execute a larger-scale global mālama campaign. HTK will plan for alternative promotion and further discuss with HA and HTA.
- **Sales promotion with Mode Tour:** In partnership with Mode Tour, HTK will launch a mālama Hawai‘i themed sales promotion in July targeting Thanksgiving holiday period.

Public Relations

- **Press release on travel requirements to Hawai‘i:** HTK developed and distributed a press release on COVID-19 update on Hawaiian Islands and new change in Safe Travels Program that once 70% of Hawai‘i’s population is fully vaccinated it is likely that Safe Travels Programs will be terminated.

하와이 방문객 입국 절차 완화 계획 발표

4월 15일, 10월 15일, 12월 15일



관광청은 4월 15일 하와이주 관광청이 발표한 '하와이 주 내 백신 접종률 70% 달성 시 입국 절차 완화 계획'을 발표한다. 이는 기존 입국 절차를 완화하여 하와이 방문객의 입국과 체류 편의를 증진시키고, 하와이 관광산업의 활성화를 도모하는 데 목적이 있다. 또한, 하와이주 내 백신 접종률이 70%에 도달하면, 입국 절차가 단순화되고, 하와이주 내 관광산업의 활성화를 도모하는 데 목적이 있다. 이는 기존 입국 절차를 완화하여 하와이 방문객의 입국과 체류 편의를 증진시키고, 하와이 관광산업의 활성화를 도모하는 데 목적이 있다.

하와이 주 내 백신 접종률이 70%에 도달하면, 입국 절차가 단순화되고, 하와이주 내 관광산업의 활성화를 도모하는 데 목적이 있다. 이는 기존 입국 절차를 완화하여 하와이 방문객의 입국과 체류 편의를 증진시키고, 하와이 관광산업의 활성화를 도모하는 데 목적이 있다. 또한, 하와이주 내 백신 접종률이 70%에 도달하면, 입국 절차가 단순화되고, 하와이주 내 관광산업의 활성화를 도모하는 데 목적이 있다. 이는 기존 입국 절차를 완화하여 하와이 방문객의 입국과 체류 편의를 증진시키고, 하와이 관광산업의 활성화를 도모하는 데 목적이 있다.

한편, 하와이 주 내 백신 접종률이 70%에 도달하면, 입국 절차가 단순화되고, 하와이주 내 관광산업의 활성화를 도모하는 데 목적이 있다. 이는 기존 입국 절차를 완화하여 하와이 방문객의 입국과 체류 편의를 증진시키고, 하와이 관광산업의 활성화를 도모하는 데 목적이 있다.

Travel Trade Activities

Travel Trade Calls

Airline	Wholesaler/TA/TO/OTA	Other	Total
3	7	0	10

- **Summary of Key Travel Trade Activities**

- **Airlines:**

- HTK had meeting with HA to discuss mālama Hawai'i promotion initiative and its flight frequency increase in August.
 - Met with OZ to discuss mālama promotion opportunity targeting its charter flight operation on Thanksgiving holiday
 - Met with KE to provide the latest destination update as well as to discuss KE's Thanks giving charter flight plan.

- **Travel Agencies:** Further to the 2nd session of Aloha Special University held on June 30, HTK had separate virtual meeting with 10 travel agencies including OTAs and wholesalers to share current market update and also future partnership opportunities. These travel agencies are Hāna Tour, Mode Tour, Interpark Tour, Honeymoon Resort, Palm Tour, Hanjin Travel, SM Town Travel, Sejoong Travel and Verygood Tour.

Responsible Tourism Update

- **HTK has promoted responsible tourism and Mālama Hawai'i through below activities:**

- Consumer e-newsletter
 - Social media post
 - Aloha Specialist University

Coming Attractions for Leisure Market

What	When	Where
August Social Calendar Development	4 th week of July	Seoul
Regenerative Tourism Promotion with Mode Tour	July - August	Seoul
Airline co-op with HA	July	Seoul
Consumer Promotion with Everland	June - August	Seoul

7

Presentation of Legal, Financial and Operational
Impacts of HB862 (Act 001, Special Session 2021) to
the Hawai'i Tourism Authority and the Hawai'i
Convention Center



Hawai'i Convention Center
1801 Kalākaua Avenue, Honolulu, Hawai'i 96815
kelepona tel 808 973 2255
kelepa'i fax 808 973 2253
kahua pa'a web hawaii tourismauthority.org

David Y. Ige
Governor

John De Fries
President and Chief Executive Officer

<DATE>

TO: The Honorable David Y. Ige
Governor, State of Hawaii

FROM: John De Fries, President and Chief Executive Officer
Hawai'i Tourism Authority

SUBJECT: Request for Use of Coronavirus State Fiscal Recovery Funds (CSFRF)

Consistent with the requirements of the American Rescue Plan (ARP) Act, Hawai'i Tourism Authority requests a \$_____ sub-award from the Coronavirus State Fiscal Recovery Funds (CSFRF).

This request qualifies as an allowable use of CSFRF as determined by a review of the requirements of the Interim Final Rule adopted by the U.S. Treasury on May 10, 2021. The eligible use and expenditure category are identified in the attached "Attestation of Qualifying Coronavirus State Fiscal Recovery Fund Expenditures" (Form CSFRF-2).

This request is an appropriate use of CSFRF because the proposed use of the funds does not qualify for other sources of federal funding.

The Hawai'i Tourism Authority understands that these funds can be only used for costs incurred during the period March 3, 2021 – December 31, 2024.

This request is for:

1. Project name:

2. Project description (50 to 250 words)

Request for Coronavirus State Fiscal Recovery Funds (CSFRF)
Hawai'i Tourism Authority
<DATE>

3. Describe and indicate purpose:

4. Describe the intended outcome:

5. What key performance indicators will be used to measure the intended outcome?

6. Provide a cost breakdown for the request.

7. If applicable, indicate if special project authorization and approval to establish and fill exempt temporary special project positions is requested.

Request for Coronavirus State Fiscal Recovery Funds (CSFRF)
Hawai'i Tourism Authority
<DATE>

We will comply with the CSFRF reporting requirements issued by the Department of the U.S. Treasury.

John De Fries
President and Chief Executive Officer
Hawai'i Tourism Authority

Date

RECOMMENDATION:

APPROVAL DISAPPROVAL

Mike McCartney
Department Director (DBEDT)

Date

APPROVAL DISAPPROVAL

Craig K. Hirai
Authorized State Representative

Date

APPROVED **DISAPPROVED**

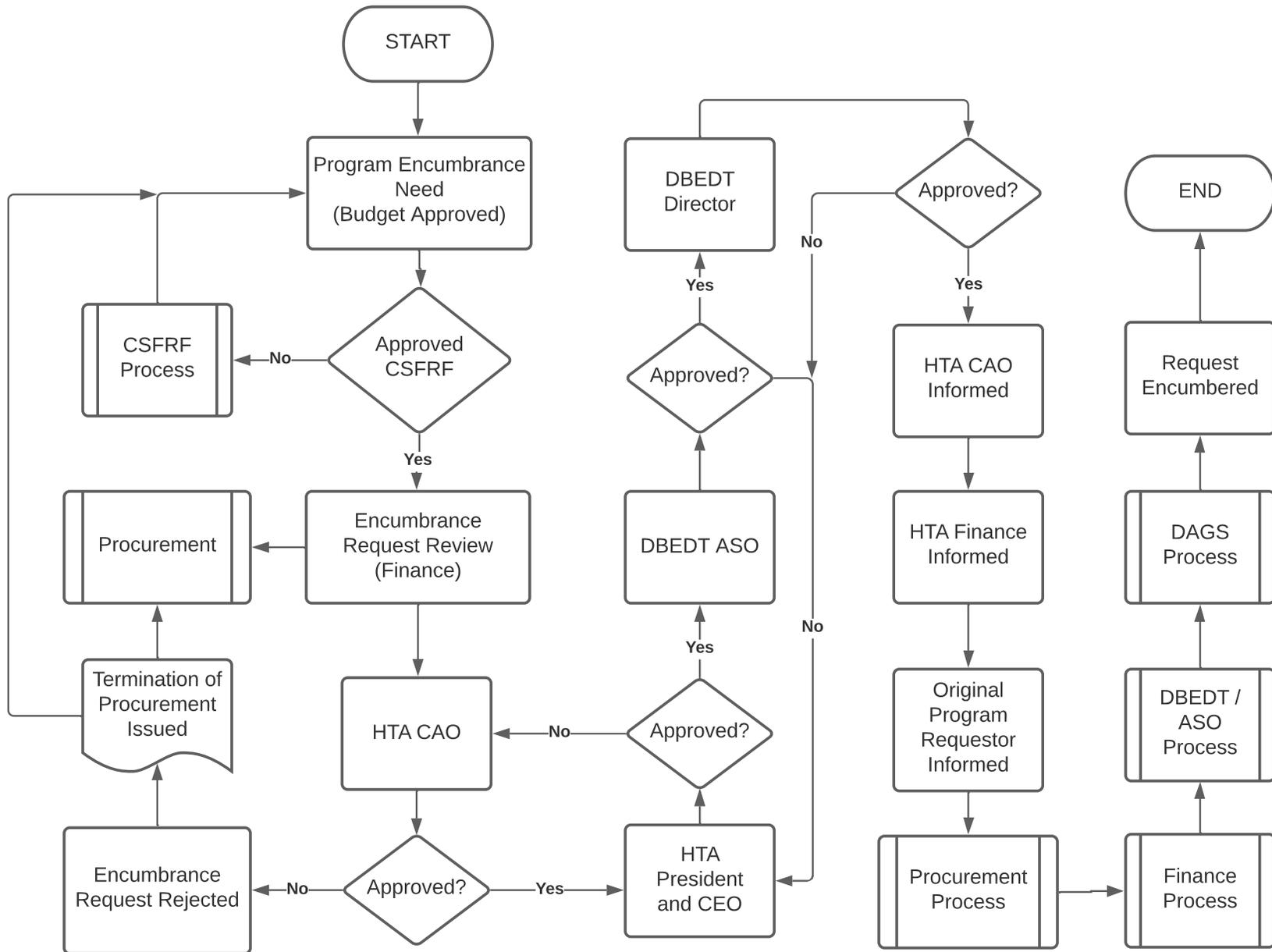
DAVID Y. IGE, Governor

Date

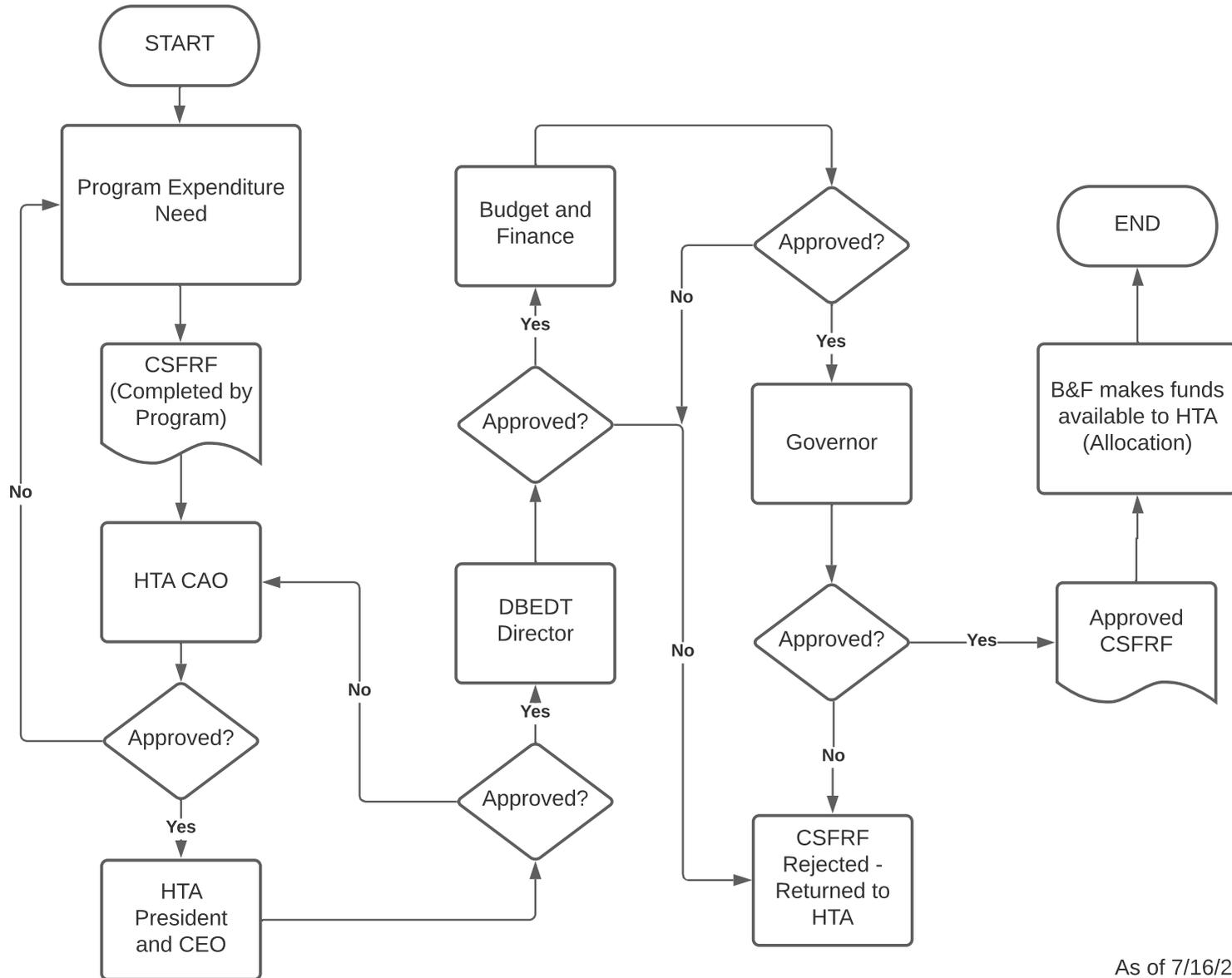
Attachment (Form CSFRF-2)

c: Craig K. Hirai, Director of Finance
 Curt Otaguro, Comptroller

Encumbrance Requests (ARPA)



Initial Funding Request (ARPA)



As of 7/16/2021

9

Presentation and Discussion of Current Market Insights and Conditions in Hawai'i and Key Major Hawai'i Tourism Markets



Market Insights – May 2021

The HTA Monthly Market Insights reports on the most recent key performance indicators that the Hawai'i Tourism Authority (HTA) uses to measure success. The following measures provide indicators of the overall health of Hawai'i's visitor industry and help to gauge if the HTA is successfully attaining its goals.

Report on Economic Impact

In May 2021, the State's Safe Travels program was still underway, with most passengers arriving from out-of-state able to bypass the 10-day self-quarantine with a valid negative COVID-19 prior to departure. The counties of Hawai'i, Kaua'i, Maui and Kalawao (Moloka'i) also had a partial quarantine in place in May. The CDC enforced restrictions on cruise ships through a "Conditional Sail Order."

For the first five months of 2021, Hawai'i's tourism economy experienced:

- Total visitor spending: \$3.43 billion.¹ There is no comparative visitor spending data available for May 2020. Visitor spending declined 52.6 percent compared to \$7.23 billion in year-to-date May 2019.
- Visitor Arrivals: 1,960,796, compared to 2,139,166 visitors (-8.3%) in year-to-date 2020; versus 4,224,071 visitors (-53.6%) in year-to-date May 2019.
- Through May 2021, the state collected \$165.5 million in TAT, down 70.2 percent compared to FY 2020 through May 2020 (Preliminary data from Dept of Taxation).
- Flights: 16,356, Seats: 3,349,307; compared to 15,515 flights and 3,446,538 seats in year-to-date May 2020; versus 25,220 flights 5,567,901 seats in year-to-date 2019.

Table 1: Overall Key Performance Indicators – Total (Air + Cruise) – YTD May 2021 vs. YTD May 2020

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A ^{2/}	3,427.3 ^{1/}	9,711.8
Daily Spend (\$PPPD)	N/A	N/A ^{2/}	173.5 ^{1/}	185.4
Visitor Days	-1.0%	19,945,481	19,753,038	52,372,004
Arrivals	-8.3%	2,139,166	1,960,796	5,510,247
Daily Census	-0.3%	131,220	130,815	143,485
Airlift (scheduled seats)	-2.2%	3,409,056	3,334,834	11,882,593

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

^{1/}Year-to-date May 2021 visitor spending statistics were from U.S. West, U.S. East, Japan, and Canada (Canada data were only available for January and February). Spending data for visitors from the other markets were not available due to limited samples.

^{2/}May year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID19.

Table 2: Overall Key Performance Indicators – Total (Air + Cruise) – YTD May 2021 vs. YTD May 2019

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	-52.6%	7,227.0	3,427.3	9,711.8
Daily Spend (\$PPPD)	-11.4%	195.8	173.5	185.4
Visitor Days	-46.5%	36,904,705	19,753,038	52,372,004
Arrivals	-53.6%	4,224,071	1,960,796	5,510,247
Daily Census	-46.5%	244,402	130,815	143,485
Airlift (scheduled seats)	-39.7%	5,526,217	3,334,834	11,882,593

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

^{1/}Year-to-date May 2021 visitor spending statistics were from U.S. West, U.S. East, Japan, and Canada (Canada data were only available for January and February). Spending data for visitors from the other markets were not available due to limited samples.

Figure 1: Monthly Visitor Expenditures (\$mil) – 2021 vs. 2020

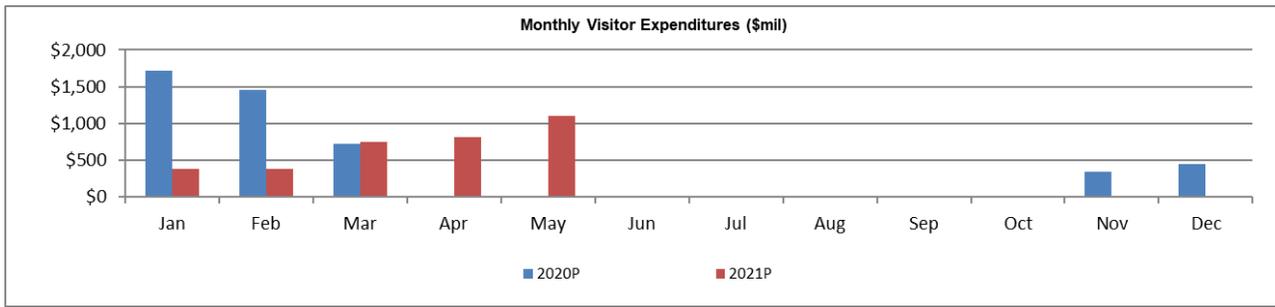
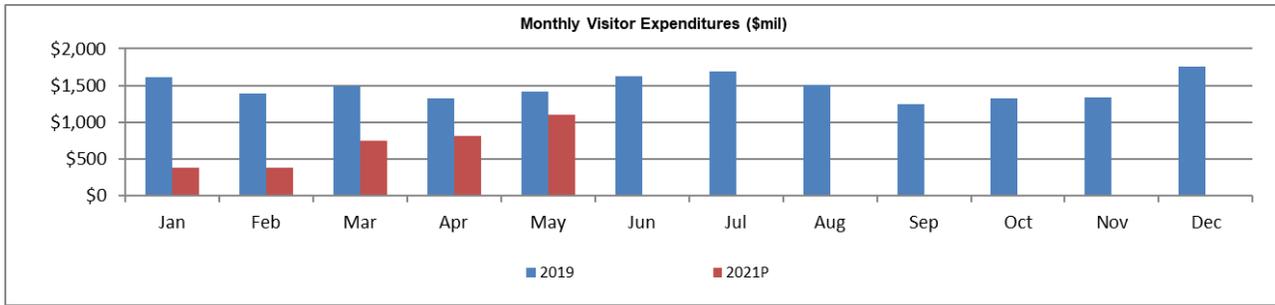


Figure 2: Monthly Visitor Expenditures (\$mil) – 2021 vs. 2019



Major Market Areas (MMAs)

USA

Table 3: Key Performance Indicators - U.S. Total (YTD May 2021 vs. YTD May 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	3,389.7	7,833.4
Daily Spend (\$PPPD)	N/A	N/A [†]	178.8	184.1
Visitor Days	37.1%	13,832,184	18,958,543	42,553,079
Arrivals	32.6%	1,435,925	1,904,640	4,403,876
Daily Census	38.0%	91,001	125,553	116,584
Airlift (scheduled seats)	27.8%	2,517,950	3,217,019	9,830,792

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

[†]May year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID19.

Table 4: Key Performance Indicators - U.S. Total (YTD May 2021 vs. YTD May 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	-27.3%	4,663.6	3,389.7	7,833.4
Daily Spend (\$PPPD)	-5.1%	188.4	178.8	184.1
Visitor Days	-23.4%	24,754,405	18,958,543	42,553,079
Arrivals	-30.8%	2,751,492	1,904,640	4,403,876
Daily Census	-23.4%	163,936	125,553	116,584
Airlift (scheduled seats)	-17.0%	3,875,933	3,217,019	9,830,792

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

- The unemployment rate for May fell to 5.8 percent as hiring picked up and some states announced they will roll back federal unemployment benefits.

- The Conference Board Consumer Confidence Index held steady in May 2021 following a gain in April. The Index now stands at 117.2 (1985=100), down marginally from 117.5 in April.
- Major U.S. wholesalers' focus continues to be Hawai'i's safety and protocol guide, travel insurance/protection, and travel advisor educational messaging.
- Wholesale partners are seeing positive trends and increased demand in week-over-week bookings. All are seeing sustained strength and the largest total booking pace since pre-pandemic levels. Bookings have been stronger for autumn than Hawai'i typically sees and especially strong into the winter holidays.
- The forecast for domestic scheduled nonstop air seats to Hawai'i for June - August 2021 will increase by +702.1 percent as compared with the same time period of 2020 (April 2020 was the first month of the 14-day quarantine and the immediate reduction of flights). The projection is based on flights appearing in Diio Mi airline schedules. Due to COVID-19, the constant fluidity in scheduled air seats is expected to continue in all major market areas including U.S. West (+649.7%) and U.S. East (+1,394.3%). The situation is being monitored and the forecast adjusted accordingly.

US WEST

Table 5: Key Performance Indicators - U.S. West (YTD May 2021 vs. YTD May 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A†	2,271.3	4,850.7
Daily Spend (\$PPPD)	N/A	N/A†	175.3	173.0
Visitor Days	54.3%	8,397,384	12,953,932	28,031,536
Arrivals	46.5%	917,741	1,344,101	3,002,696
Daily Census	55.3%	55,246	85,788	76,799
Airlift (scheduled seats)	29.8%	2,185,115	2,836,598	8,530,031

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

†May year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID19.

Table 6: Key Performance Indicators - U.S. West (YTD May 2021 vs. YTD May 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	-17.3%	2,745.5	2,271.3	4,850.7
Daily Spend (\$PPPD)	-0.8%	176.7	175.3	173.0
Visitor Days	-16.6%	15,534,602	12,953,932	28,031,536
Arrivals	-25.5%	1,805,355	1,344,101	3,002,696
Daily Census	-16.6%	102,878	85,788	76,799
Airlift (scheduled seats)	-16.4%	3,393,809	2,836,598	8,530,031

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

- In May 2021, 418,956 visitors arrived from the U.S. West, well above the 5,842 visitors (+7,072.0%) in May 2020, and exceeding the May 2019 count of 387,844 visitors (+8.0%). U.S. West visitors spent \$715.5 million in May 2021 which surpassed the \$564.0 million (+26.9%) spent in May 2019.
- Through the first five months of 2021, there were 1,344,101 visitors from the U.S. West compared to 917,741 visitors (+46.5%) in year-to-date 2020, versus 1,805,355 visitors (-25.5%) in year-to-date 2019. For the first five months of 2021, total visitor spending was \$2.27 billion, down 17.3 percent from \$2.75 billion in year-to-date 2019.

- In terms of travel restrictions in May 2021, California issued a travel advisory that recommended caution and suggested self-quarantine for unvaccinated Californians returning to the state. In Oregon, returning residents, were still advised to self-quarantine for 14 days after arrival, except for asymptomatic travelers who had received a complete dosage of the COVID-19 vaccine and it had been 14 days since their final dose. In Washington, returning residents who were fully vaccinated with an FDA-authorized vaccine were not required to get tested before or after travel unless required by the destination, and did not need to self-quarantine. Unvaccinated travelers were recommended to get tested before and after traveling.

US EAST

Table 7: Key Performance Indicators - U.S. East (YTD May 2021 vs. YTD May 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	1,118.4	2,982.6
Daily Spend (\$PPPD)	N/A	N/A [†]	186.3	205.4
Visitor Days	10.5%	5,434,801	6,004,611	14,521,543
Arrivals	8.2%	518,185	560,540	1,401,180
Daily Census	11.2%	35,755	39,766	39,785
Airlift (scheduled seats)	14.3%	332,835	380,421	1,300,761

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

[†]May year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID19.

Table 8: Key Performance Indicators - U.S. East (YTD May 2021 vs. YTD May 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	-41.7%	1,918.1	1,118.4	2,982.6
Daily Spend (\$PPPD)	-10.5%	208.0	186.3	205.4
Visitor Days	-34.9%	9,219,803	6,004,611	14,521,543
Arrivals	-40.8%	946,137	560,540	1,401,180
Daily Census	-34.9%	61,058	39,766	39,785
Airlift (scheduled seats)	-21.1%	482,124	380,421	1,300,761

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

- There were 193,501 visitors from the U.S. East in May 2021, compared to 2,647 visitors (+7,209.6%) in May 2020, versus 199,344 visitors (-2.9%) in May 2019. U.S. East visitors spent \$380.9 million in May 2021 compared to \$392.4 million (-2.9%) in May 2019.
- Through the first five months of 2021, there were 560,540 visitors from the U.S. East compared to 518,185 visitors (+8.2%) in year-to-date 2020, versus 946,137 visitors (-40.8%) in year-to-date 2019. For the first five months of 2021, total visitor spending was \$1.12 billion, a decrease of 41.7 percent from \$1.92 billion in year-to-date 2019.
- In New York, there was no quarantine or testing requirements for asymptomatic domestic travelers. Unvaccinated returning residents were recommended to get tested three to five days after arrival in New York and consider non-mandated self-quarantine (for seven days if tested within three to five days, otherwise for ten days).

CANADA

Table 9: Key Performance Indicators – Canada (YTD May 2021 vs. YTD May 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	17.2 ^{3/}	449.3
Daily Spend (\$PPPD)	N/A	N/A [†]	129.5 ^{3/}	168.6
Visitor Days	-93.5%	2,054,280	132,862	2,664,375
Arrivals	-96.9%	155,764	4,807	195,431
Daily Census	-93.5%	13,515	880	7,300
Airlift (scheduled seats)	-93.3%	164,881	11,080	245,510

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

[†]May year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID19.

^{3/}Year-to-date 2021 visitor spending statistics were only for January and February. March - May 2021 spending data were not available due to limited samples.

Table 10: Key Performance Indicators – Canada (YTD May 2021 vs. YTD May 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	606.7	17.2 ^{3/}	449.3
Daily Spend (\$PPPD)	N/A	166.4	129.5 ^{3/}	168.6
Visitor Days	-96.4%	3,646,133	132,862	2,664,375
Arrivals	-98.4%	296,362	4,807	195,431
Daily Census	-96.4%	24,147	880	7,300
Airlift (scheduled seats)	-96.2%	289,796	11,080	245,510

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

^{3/}Year-to-date 2021 visitor spending statistics were only for January and February. March and May 2021 spending data were not available due to limited samples.

- Only 564 visitors arrived from Canada in May 2021, compared to 20 visitors (+2,711.0%) in May 2020, versus 26,424 visitors (-97.9%) in May 2019.
- Through the first five months of 2021, there were 4,807 visitors from Canada compared to 155,764 visitors (-96.9%) in year-to-date 2020, versus 296,362 visitors (-98.4%) in year-to-date 2019.
- Travelers to Canada, including returning Canadian nationals, were required to take a COVID-19 molecular test upon arrival, and another test toward the end of their mandatory 14-day quarantine. Prior to departure to Canada, most travelers were required to reserve a three-night stay in a government-authorized hotel. In addition, they were required to submit their travel and contact information, including a suitable quarantine plan, electronically via ArriveCAN before boarding their flight.
- Canada's economy could be in for a significant rebound this year, according to an upgraded outlook from the Organization for Economic Co-operation and Development (OECD) which now expects the Canadian economy to grow by 6.1 percent in 2021. The prediction is up from an estimated growth of 4.7 percent that the OECD made in March. The rebound is thanks to reduced COVID-19 restrictions in the second half of the year and external demand. Growth in Canada for 2022 is forecasted at 3.8 percent compared with a March estimate of 4.0 percent.
- The back half of 2021 could also see increases in consumer spending and improvements to the labour market as public health measures are lifted once the latest waves of COVID-19 die down. The pandemic will continue to pose a risk to the pace of economic recovery, however, as more contractible variants of the disease continue to circulate and force jurisdictions in the country to enact additional health measures.

- After gaining strength in the latter half of 2020, the loonie remained stable in the first three months of 2021 registering an average value of USD \$0.79 (+6.0%), a 7.6 percent increase over 2020.

JAPAN

Table 11: Key Performance Indicators – Japan (YTD May 2021 vs. YTD May 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	20.4	454.4
Daily Spend (\$PPPD)	N/A	N/A [†]	213.5	227.4
Visitor Days	-94.5%	1,730,457	95,369	1,998,302
Arrivals	-98.1%	294,255	5,589	347,802
Daily Census	-94.5%	11,385	632	5,475
Airlift (scheduled seats)	-89.8%	466,072	47,385	1,187,421

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

[†]May year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID19.

Table 12: Key Performance Indicators – Japan (YTD May 2021 vs. YTD May 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	-97.6%	850.4	20.4	454.4
Daily Spend (\$PPPD)	-10.8%	239.3	213.5	227.4
Visitor Days	-97.3%	3,553,482	95,369	1,998,302
Arrivals	-99.1%	607,643	5,589	347,802
Daily Census	-97.3%	23,533	632	5,475
Airlift (scheduled seats)	-94.3%	825,902	47,385	1,187,421

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

- In May 2021, 1,312 visitors came from Japan, compared to 14 visitors (+9,357.8%) in May 2020, versus 113,226 visitors (-98.8%) in May 2019. Visitors from Japan spent \$4.9 million in May 2021 compared to \$162.4 million (-97.0%) in May 2019.
- Through the first five months of 2021, there were 5,589 visitors from Japan compared to 294,255 visitors (-98.1%) in year-to-date 2020, versus 607,643 visitors (-99.1%) in year-to-date 2019. For the first five months of 2021, total visitor spending was \$20.4 million, a drop of 97.6 percent from \$850.4 million in year-to-date 2019.
- Based on IMF forecast in April 2021, Japan's GDP growth for 2021 is 3.3 percent which increased 0.2 percent compared to the January forecast. With the financial policies and vaccination progress, the economic recovery will be expected.
- The Japan government announced the 3rd state of emergency to 10 prefectures including Tokyo and Osaka until June 20, 2021.
- Based on Nikkei data bank "NEEDS" and Japan Cabinet office's Quarter 1, 2021 GDP report, the 2021 overall GDP growth is forecasted at 5.9 percent and 2.3 percent for 2022.
- Less than 2 months to the Olympics in Tokyo, Japan government continued restricting entry to the country for not only foreigners but also returning residents.
- Japan National Tourism Organization (JNTO) announced Japanese outbound travel for May 2021 as 30,100 passengers, 97.9 percent down compared to 2019.
- With Hawai'i's vaccination progress and ease of travel restrictions, Japan travel trade industry is expecting Hawai'i to be one of the first outbound destinations for tourism recovery once Japan government eases travel restrictions.

- Airline Operation: Flights provided by ANA, Hawaiian and JAL: 34 flights with 8,428 seats in May; 34 flights with 8,368 seats in June.
- July: 37 flights with 9,286 seats. ZIPAIR will resume flights from 7/21.
- August: 43 flights with 11,098 seats. ANA A380 Flying Honu will be back in August with two scheduled flights on August 9 & 13 from Narita to Honolulu.
- Airline Flight Suspension: Delta (until 8/31 for Haneda, until further notice for Osaka); United (until 9/8); Korean (Until 7/31); ZIPAIR (until 7/20)

OCEANIA

Table 13: Key Performance Indicators – Oceania (YTD May 2021 vs. YTD May 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	N/A ^{4/}	202.8
Daily Spend (\$PPPD)	N/A	N/A [†]	N/A ^{4/}	258.0
Visitor Days	-97.8%	567,119	12,234	786,033
Arrivals	-98.9%	60,780	691	82,654
Daily Census	-97.8%	3,731	81	2,154
Airlift (scheduled seats)	-100.0%	95,737	0	137,772

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diiio Mi flight schedules as of May 26, 2021, subject to change.

[†]May year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID19.

^{4/}Year-to-date 2021 visitor spending data for January-May were not available due to limited samples.

Table 14: Key Performance Indicators – Oceania (YTD May 2021 vs. YTD May 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	326.8	N/A ^{4/}	202.8
Daily Spend (\$PPPD)	N/A	263.1	N/A ^{4/}	258.0
Visitor Days	-99.0%	1,242,158	12,234	786,033
Arrivals	-99.5%	133,172	691	82,654
Daily Census	-99.0%	8,226	81	2,154
Airlift (scheduled seats)	-100.0%	200,684	0	137,772

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diiio Mi flight schedules as of May 26, 2021, subject to change.

^{4/}Year-to-date 2021 visitor spending data for January-May were not available due to limited samples.

- There were 64 visitors from Australia in May 2021 who came on domestic flights. Direct flights from Australia continued to be suspended. In comparison there were two visitors in May 2020, versus 26,361 visitors in May 2019. The Australian government continued to impose a ban on all overseas travel for Australians unless an exemption was granted. Residents returning to Australia were required to undergo a mandatory 14-day quarantine.
- Through the first five months of 2021, there were 213 visitors from Australia, compared to 50,072 visitors (-99.6%) in year-to-date 2020, versus 107,167 visitors (-99.8%) in year-to-date 2019.
- There were 157 visitors from New Zealand in May 2021 who arrived on domestic flights. Direct flights from New Zealand continued to be suspended. In comparison, there were 21 visitors in May 2020, versus 7,412 visitors in May 2019. The New Zealand government advised New Zealanders to refrain from travel overseas due to COVID-19 health risks and travel restrictions. Residents returning to New Zealand were required to complete at least 14 days of quarantine and test negative for COVID-19 before entering the community.

- Through the first five months of 2021, there were 478 visitors from New Zealand, compared to 10,708 visitors (-95.5%) in year-to-date 2020, versus 26,005 visitors (-98.2%) in year-to-date 2019.
- Both the Trans-Tasman Bubble and Cook Islands/New Zealand Bubble were operating during May 2021, providing much needed tourism revenue for the industry. There was a hiccup late in the month due to a community outbreak in Melbourne, although this has only affected travel to and from the State of Victoria at this stage. The Melbourne outbreak has been reflected in a slight drop in consumer confidence as reported by researcher ANZ-Ray Morgan. Although more people do have a positive view of the next 18 months than negative.
- In May 2021, both Brand USA and the Visit USA organisations in Australia/New Zealand have announced the recommencement of activity, and with it, optimism. The Australian and New Zealand governments are extremely conscious of the importance of access between AU/NZ and the USA for both business and tourism and much work is taking place to ensure that the USA is one of the early markets to re-open.
- The rate of COVID-19 vaccinations continues to increase as we move towards the month of July when greater supplies will start arriving in the area. Thus far, close to 5.5 million vaccinations have been administered in Australia and 750,000 in New Zealand.
- Local currencies continued to be stable and strong when compared to the US\$. Both the AU\$ and NZ\$ continue to offer great value against the US\$ (AU\$1.00 = US\$0.77 and NZ\$1.00 = US\$0.72).

EUROPE

Table 15: Key Performance Indicators – Europe (YTD May 2021 vs. YTD May 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	N/A ^{5/}	106.4
Daily Spend (\$PPPD)	N/A	N/A [†]	N/A ^{5/}	146.7
Visitor Days	-84.2%	269,114	42,587	725,338
Arrivals	-86.1%	20,444	2,839	55,102
Daily Census	-84.1%	1,770	282	1,987
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

*DBEDT 2021 annual forecast (Quarter 1, 2021).

[†]May year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID19.

^{5/}Year-to-date 2021 visitor spending data for January-May were not available due to limited samples.

Table 16: Key Performance Indicators – Europe (YTD May 2021 vs. YTD May 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	97.6	N/A ^{5/}	106.4
Daily Spend (\$PPPD)	N/A	164.4	N/A ^{5/}	146.7
Visitor Days	-92.8%	593,835	42,587	725,338
Arrivals	-93.8%	46,035	2,839	55,102
Daily Census	-92.8%	3,933	282	1,987
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

*DBEDT 2021 annual forecast (Quarter 1, 2021).

[†]May year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID19.

^{5/}Year-to-date 2021 visitor spending data for January-May were not available due to limited samples.

- In May 2021, there were 942 visitors from the United Kingdom, France, Germany, Italy and Switzerland. In comparison, 25 visitors came in May 2020, versus 10,332 visitors who came in May 2019. In Germany, returning German nationals, with proof of COVID-19 vaccination were able to bypass testing and quarantine, unless they returned from areas where COVID-19 variants were prevalent. In the United Kingdom, quarantine rules for returning nationals depended on whether the country they traveled to was on the green, red or amber list designated by the U.K. Government. Those who returned from a red list country were required to quarantine in a designated hotel for 10 days at their own expense. Those who returned from an amber list country were required to quarantine at home for 10 days. Those who returned from a green list destination were not required to quarantine if they tested negative for COVID-19 prior to departure, and tested negative on the second day after returning to the U.K.
- Through the first five months of 2021, there were 2,839 visitors from Europe, compared to 20,444 visitors (-86.1%) in year-to-date 2020, versus 46,035 visitors (-93.8%) in year-to-date 2019.

OTHER ASIA

Table 17: Key Performance Indicators – Other Asia (YTD May 2021 vs. YTD May 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	N/A ^{6/}	NA
Daily Spend (\$PPPD)	N/A	N/A [†]	N/A ^{6/}	NA
Visitor Days	-86.2%	488,988	67,492	NA
Arrivals	-93.6%	57,005	3,627	NA
Daily Census	-86.1%	3,217	447	NA
Airlift (scheduled seats)	-100.0%	86,695	0	245,134

*DBEDT 2021 annual forecast is not available. 2021 seats forecast by HTA, based on Diao Mi flight schedules as of May 26, 2021, subject to change.

[†]May year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID-19.

^{6/}Year-to-date 2021 visitor spending data for January-May were not available due to limited samples.

Table 18: Key Performance Indicators – Other Asia (YTD May 2021 vs. YTD May 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	366.7	N/A ^{6/}	NA
Daily Spend (\$PPPD)	N/A	297.8	N/A ^{6/}	NA
Visitor Days	-94.5%	1,231,490	67,492	NA
Arrivals	-97.6%	153,953	3,627	NA
Daily Census	-94.5%	8,156	447	NA
Airlift (scheduled seats)	-100.0%	205,111	0	245,134

*DBEDT 2021 annual forecast is not available. 2021 seats forecast by HTA, based on Diao Mi flight schedules as of May 26, 2021, subject to change.

^{6/}Year-to-date 2021 visitor spending data for January-May were not available due to limited samples.

- In May 2021, there were 1,487 visitors from Other Asia (China, Hong Kong, Korea, Singapore, Taiwan) compared to 52 visitors in May 2020, versus 30,907 in May 2019.
- Through the first five months of 2021, there were 3,627 visitors from Other Asia, compared to 57,005 visitors in year-to-date 2020, versus 153,953 visitors in year-to-date 2019.

KOREA

Table 19: Key Performance Indicators – Korea (YTD May 2021 vs. YTD May 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	N/A ^{7/}	127.0
Daily Spend (\$PPPD)	N/A	N/A [†]	N/A ^{7/}	278.2
Visitor Days	-87.7%	348,453	42,846	456,698
Arrivals	-95.9%	41,650	1,707	55,102
Daily Census	-87.6%	2,292	284	1,251
Airlift (scheduled seats)	-88.3%	71,175	8,340	214,534

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

[†]May year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID19.

^{7/}Year-to-date 2021 visitor spending data for January-May were not available due to limited samples.

Table 20: Key Performance Indicators – Korea (YTD May 2021 vs. YTD May 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	204.2	N/A ^{7/}	127.0
Daily Spend (\$PPPD)	N/A	278.5	N/A ^{7/}	278.2
Visitor Days	-94.2%	733,030	42,846	456,698
Arrivals	-98.2%	94,062	1,707	55,102
Daily Census	-94.2%	4,855	284	1,251
Airlift (scheduled seats)	-93.9%	136,117	8,340	214,534

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

^{7/}Year-to-date 2021 visitor spending data for January-May were not available due to limited samples.

- There were 494 visitors from Korea in May 2021. Of that number, 343 arrived on direct flights from Korea and 151 came on domestic flights. In comparison, there were 21 visitors in May 2020, versus 16,035 visitors in May 2019. Effective May 5, 2021 returning Korean nationals who completed full vaccination and tested negative for COVID-19 were exempted from the mandatory 14-day quarantine.
- Through the first five months of 2021, there were 1,707 visitors from Korea, compared to 41,650 visitors (-95.9%) in year-to-date 2020, versus 94,062 visitors (-98.2%) in year-to-date 2019.
- The Korean government plans to introduce more relaxed guidelines from July 2021 to stimulate the economy as the vaccination rate increases. According to the eased measures, face masks will become optional outdoors from July for the vaccinated, and larger groups in public spaces.
- According to the Organization for Economic Cooperation and Development (OECD), the South Korean economy is forecasted to grow 3.8 percent this year due to the strong export growth and expansionary macroeconomic policy, ramping up its previous projection of 3.3 percent.
- Consumer sentiment of Korea rose to the highest level in almost three years in May 2021 as the country's economy is on a recovery path and vaccination is going well. The composite consumer sentiment index came in at 105.2 for May 2021, up 3 points from the previous month and the highest level since June 2018.
- The average USD/WON exchange rate in May was 1,123.37 won, slightly depreciated from the previous rate of 1,118.02 won in April.
- Korean Air plans to operate three charter flights for ICN-HNL route during the Chuseok period in September 2021 and resume regular scheduled flights in coming November.

- Asiana Airlines plans to operate two charter flights for ICN-HNL route during Chuseok holiday.
- Hawaiian Airlines currently operates two weekly flights from ICN to HNL on every Friday and Sunday and plans to increase to 3 times a week starting August 1.

LATIN AMERICA

Table 21: Key Performance Indicators – Latin America (YTD May 2021 vs. YTD May 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	N/A ^{§/}	NA
Daily Spend (\$PPPD)	N/A	N/A [†]	N/A ^{§/}	NA
Visitor Days	-50.0%	53,993	27,014	NA
Arrivals	-61.3%	5,074	1,962	NA
Daily Census	-49.6%	355	179	NA
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

*DBEDT 2021 annual forecast is not available.

[†]May year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID19.

[§]Year-to-date 2021 visitor spending data for January-May were not available due to limited samples.

Table 22: Key Performance Indicators – Latin America (YTD May 2021 vs. YTD May 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	27.2	N/A ^{§/}	NA
Daily Spend (\$PPPD)	N/A	228.8	N/A ^{§/}	NA
Visitor Days	-77.3%	119,015	27,014	NA
Arrivals	-82.6%	11,306	1,962	NA
Daily Census	-77.3%	788	179	NA
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

*DBEDT 2021 annual forecast is not available.

[§]Year-to-date 2021 visitor spending data for January-May were not available due to limited samples.

- There were 689 visitors from Mexico, Brazil and Argentina in May 2021, compared to 11 visitors in May 2020, versus 2,599 visitors in May 2019. Argentina was in lockdown from May 22-30, 2021 due to increased COVID-19 infections. All ports of entry remained closed to most non-resident foreign nationals. Legal residents authorized to travel were required to complete a health affidavit up to 48 hours before returning to Argentina, provide a negative COVID-19 result from a test taken within 72 hours before travel, and self-quarantine for 10 days. In Mexico, the land border between the U.S. and Mexico continued to be closed through June 21, 2021 to non-essential crossings, but not commerce. Returning Mexican nationals who traveled by air were subject to temperature checks and health screening, and potential quarantine. A completed health declaration form was required to be presented to Immigration upon arrival in Mexico.
- Through the first five months of 2021, there were 1,962 visitors from Latin America, compared to 5,074 visitors (-61.3%) in year-to-date 2020, versus 11,306 visitors (-82.6%) in year-to-date 2019.

ISLAND VISITATION:

- **Oahu:** There were 310,744 visitors to O'ahu in May 2021, compared to 6,587 visitors in May 2020, versus 508,088 visitors in May 2019. Visitor spending was \$418.3 million⁹, down 39.5 percent from \$691.1 million in May 2019.

Through the first five months of 2021, there were 925,147 visitors to O'ahu compared to 1,232,750 visitors (-25.0%) in year-to-date 2020, versus 2,462,487 visitors (-62.4%) in year-to-date 2019. For the first five months of 2021, total visitor spending of \$1.24 billion¹⁰ was a 62.2 percent decrease from \$3.29 billion in year-to-date 2019.

- **Maui** There were 215,148 visitors to Maui in May 2021, compared to 1,054 visitors in May 2020, versus 251,665 visitors in May 2019. Visitor spending in May 2021 was \$409.2⁹ million, which surpassed the \$400.4 million in May 2019 (+2.2%).

Through the first five months of 2021, there were 723,536 visitors to Maui compared to 604,888 visitors (+19.6%) in year-to-date 2020, versus 1,226,608 visitors (-41.0%) in year-to-date 2019. For the first five months of 2021, total visitor spending was \$1.39 billion¹⁰, down 34.5 percent from \$2.13 billion in year-to-date 2019.

- **Hawai'i Island:** There were 103,594 visitors to Hawai'i Island in May 2021, compared to 1,257 visitors in May 2020, versus 139,696 visitors in May 2019. Visitor spending was \$158.6 million⁹, which exceeded the \$154.2 million in May 2019 (+2.8%).

Through the first five months of 2021, there were 349,080 visitors to Hawai'i Island compared to 392,100 visitors (-11.0%) in year-to-date 2020, versus 716,797 visitors (-51.3%) in year-to-date 2019. For the first five months of 2021, total visitor spending was \$558.2 million¹⁰, down 41.2 percent from \$949.7 million in year-to-date 2019.

- **Kaua'i:** There were 73,018 visitors to Kaua'i in May 2021, compared to 571 visitors in May 2020, versus 112,106 visitors in May 2019. Visitor spending was \$115.2 million⁹, a 23.1 percent decline from \$149.9 million in May 2019.

Through the first five months of 2021, there were 141,392 visitors to Kaua'i compared to 282,559 visitors (-50.0%) in year-to-date 2020, versus 551,749 visitors (-74.4%) in year-to-date 2019. For the first five months of 2021, total visitor spending was \$233.0 million¹⁰, a decrease of 69.6 percent from \$767.6 million in year-to-date 2019.

⁹ For May 2021, visitor spending statistics by island were from U.S. West, U.S. East and Japan only. Spending data for visitors from the other markets were not available due to limited samples.

¹⁰ Year-to-date May 2021 visitor spending statistics by island were from U.S. West, U.S. East, Japan, and Canada (Canada data were only available for January and February). Spending data for visitors from the other markets were not available due to limited samples.

Note: Year-to-date May 2020 visitor spending by island were not available, as there was no fielding between April through October 2020 due to COVID-19 restrictions.

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **OVERALL**

Key Performance Indicators

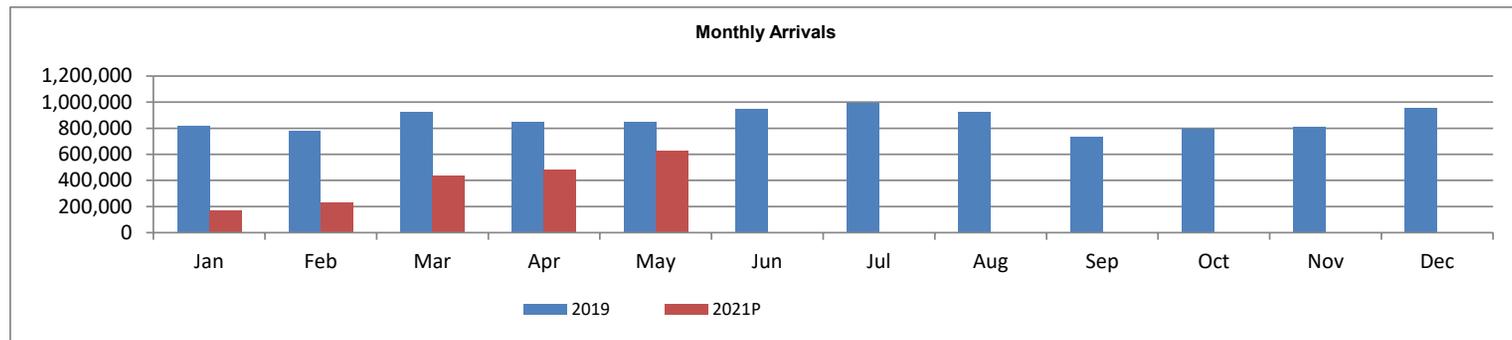
	YOY Rate	May'19 YTD	May'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{1/}	-52.6%	7,227.0	3,427.3	9,711.8
Daily Spend (\$PPPD) ^{1/}	-11.4%	195.8	173.5	185.4
Visitor Days	-46.5%	36,904,705	19,753,038	52,372,004
Arrivals	-53.6%	4,224,071	1,960,796	5,510,247
Daily Census	-46.5%	244,402	130,815	143,485
Airlift (scheduled seats)	-39.7%	5,526,217	3,334,834	11,882,593

	YOY Rate	YTD
O'ahu	-62.4%	925,147
Maui	-41.0%	723,536
Moloka'i	-71.3%	7,319
Lāna'i	-61.8%	12,827
Kaua'i	-74.4%	141,392
Hawai'i Island	-51.3%	349,080

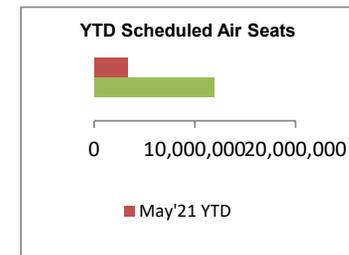
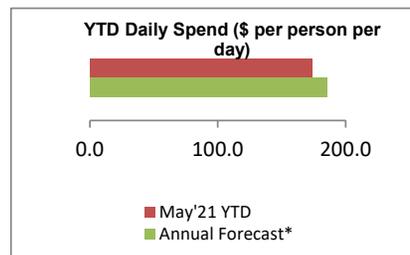
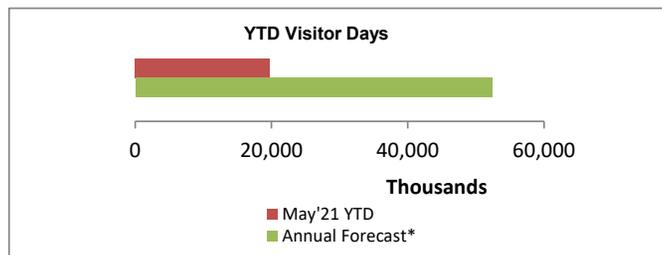
^{1/} DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Dilo Mi flight schedules as of March 16, 2021, subject to change.

May YTD 2021 visitor spending statistics were from U.S. West, U.S. East, and Japan. Spending data from Canada were from January through February only; and data from all other markets were not available due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

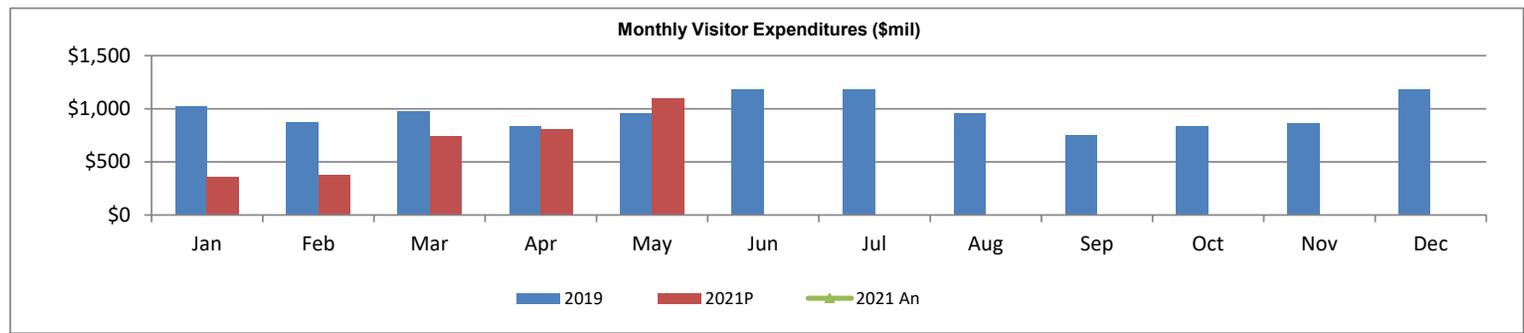
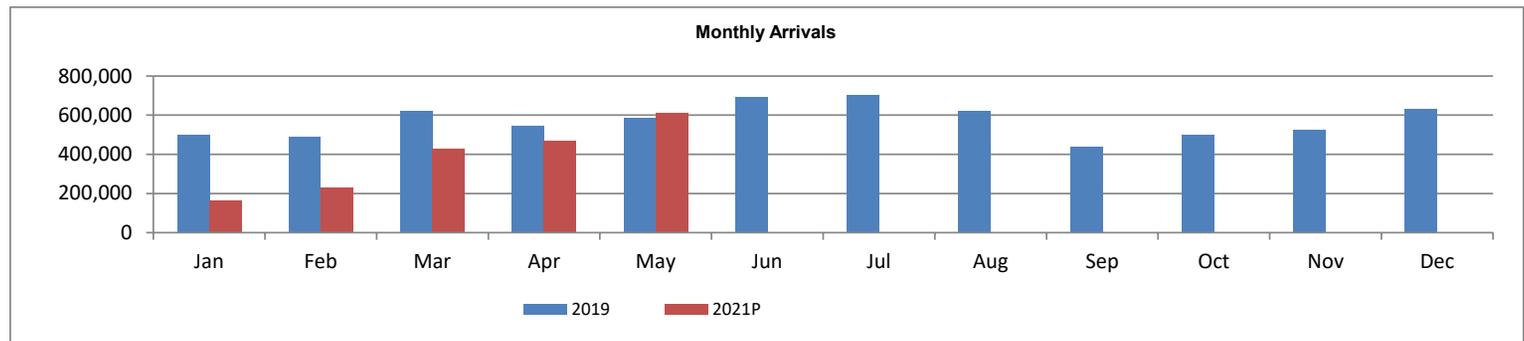
Visitor Industry Performance Measures

Market: **U.S. TOTAL**

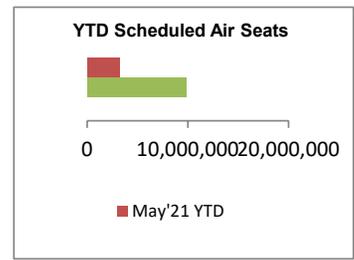
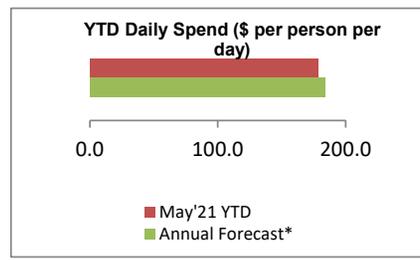
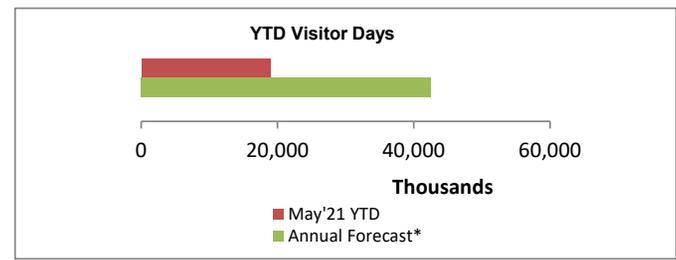
Key Performance Indicators					Key Performance Indicators		
	YOY Rate	May'19 YTD	May'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{2/}	-27.3%	4,663.6	3,389.7	7,833.4	O'ahu	-33.0%	890,493
Daily Spend (\$PPPD) ^{2/}	-5.1%	188.4	178.8	184.1	Maui	-25.6%	707,755
Visitor Days	-23.4%	24,754,405	18,958,543	42,553,079	Moloka'i	-60.7%	7,073
Arrivals	-30.8%	2,751,492	1,904,640	4,403,876	Lāna'i	-45.9%	12,454
Daily Census	-23.4%	163,936	125,553	116,584	Kaua'i	-69.6%	137,978
Airlift (scheduled seats)	-17.0%	3,875,933	3,217,019	9,830,792	Hawai'i Island	-32.9%	340,911

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Dilo Mi flight schedules as of March 16, 2021, subject to change.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **U.S. WEST**

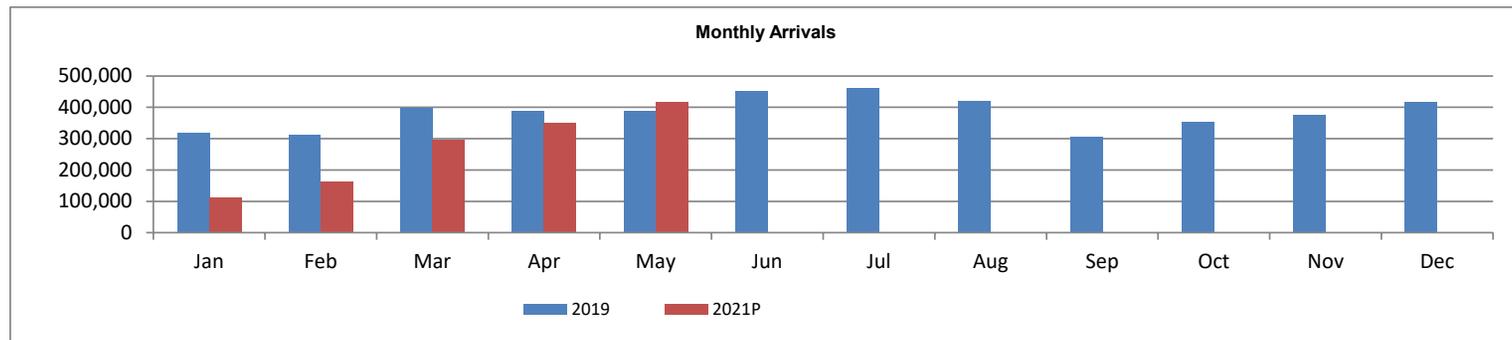
Key Performance Indicators

	YOY Rate	May'19 YTD	May'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{3/}	-17.3%	2,745.5	2,271.3	4,850.7
Daily Spend (\$PPPD) ^{3/}	-0.8%	176.7	175.3	173.0
Visitor Days	-16.6%	15,534,602	12,953,932	28,031,536
Arrivals	-25.5%	1,805,355	1,344,101	3,002,696
Daily Census	-16.6%	102,878	85,788	76,799
Airlift (scheduled seats)	-16.4%	3,393,809	2,836,598	8,530,031

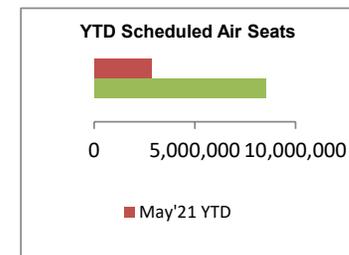
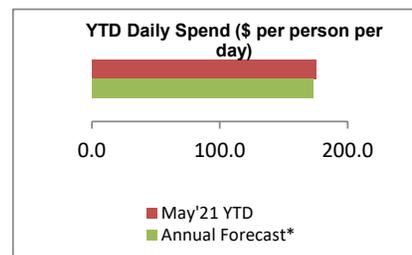
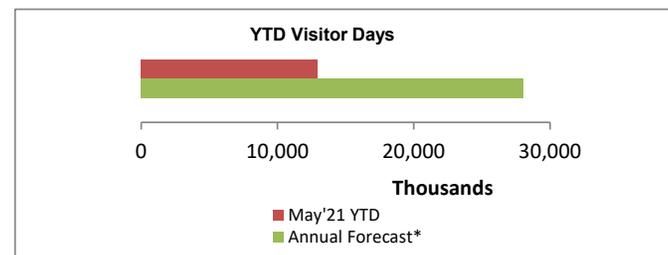
	YOY Rate	YTD
O'ahu	-27.0%	575,668
Maui	-15.8%	515,135
Moloka'i	-57.6%	4,718
Lāna'i	-37.1%	7,745
Kaua'i	-66.4%	95,243
Hawai'i Island	-24.1%	242,469

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **U.S. EAST**

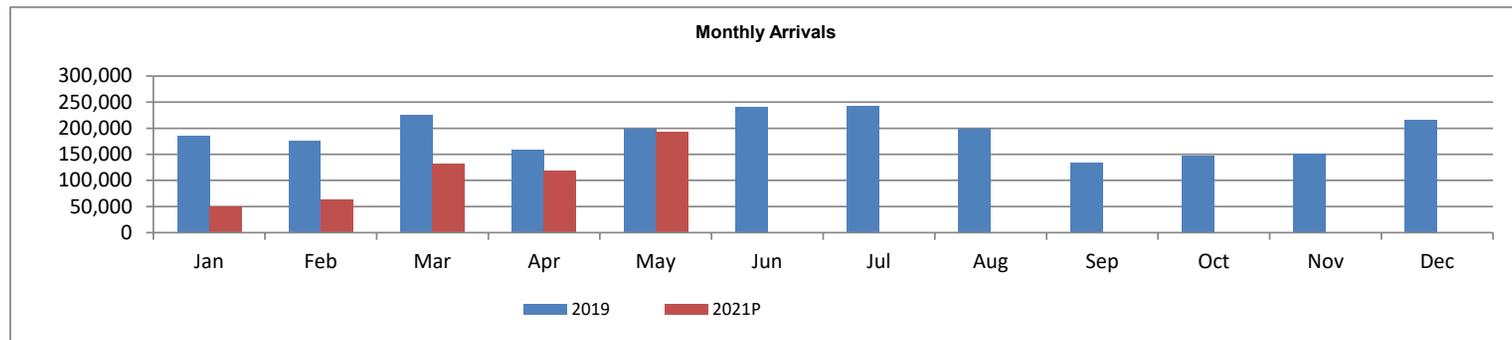
Key Performance Indicators

	YOY Rate	May'19 YTD	May'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{4/}	-41.7%	1,918.1	1,118.4	2,982.6
Daily Spend (\$PPPD) ^{4/}	-10.5%	208.0	186.3	205.4
Visitor Days	-34.9%	9,219,803	6,004,611	14,521,543
Arrivals	-40.8%	946,137	560,540	1,401,180
Daily Census	-34.9%	61,058	39,766	39,785
Airlift (scheduled seats)	-21.1%	482,124	380,421	1,300,761

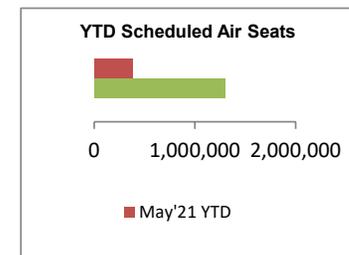
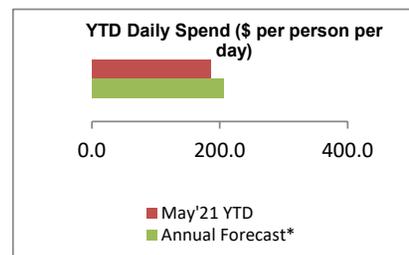
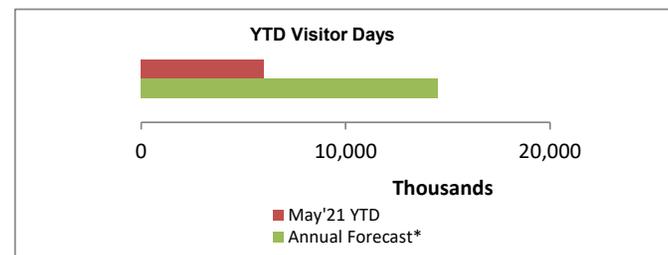
	YOY Rate	YTD
O'ahu	-41.6%	314,825
Maui	-43.4%	192,620
Moloka'i	-65.8%	2,355
Lāna'i	-56.1%	4,709
Kaua'i	-74.8%	42,735
Hawai'i Island	-47.8%	98,442

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

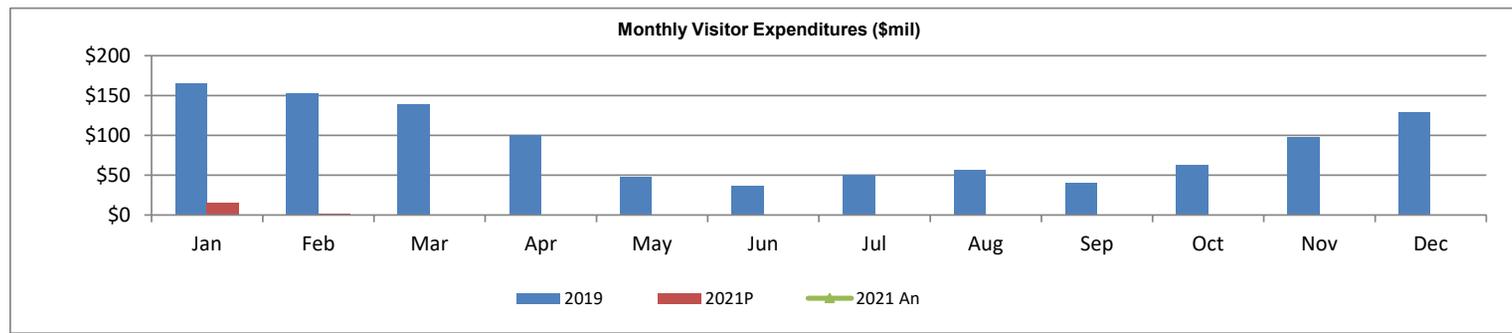
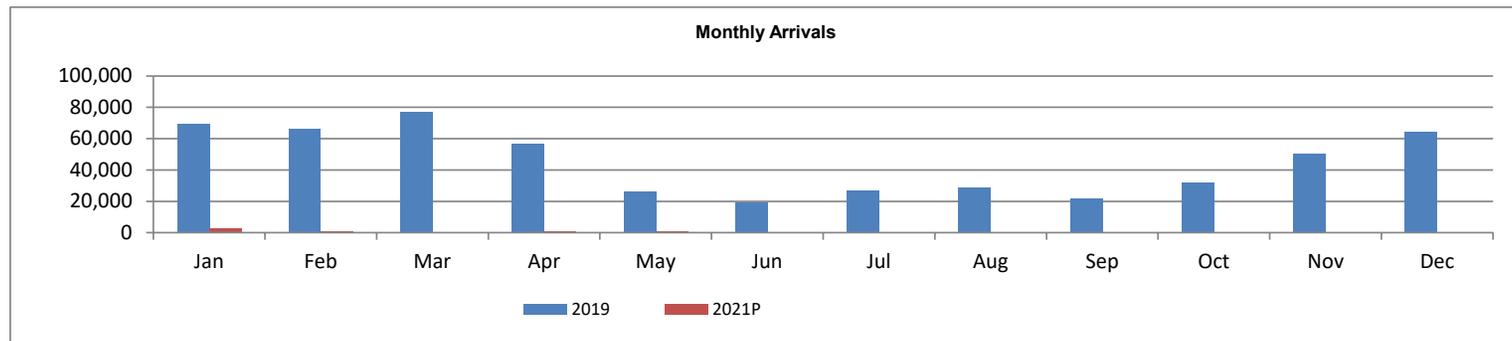
Visitor Industry Performance Measures

Market: **CANADA**

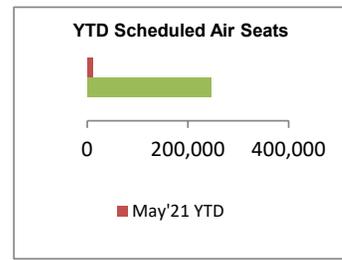
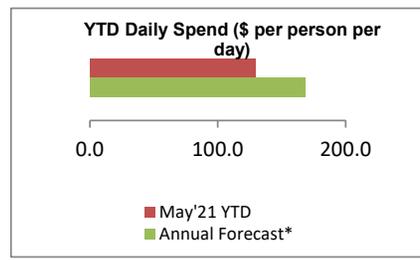
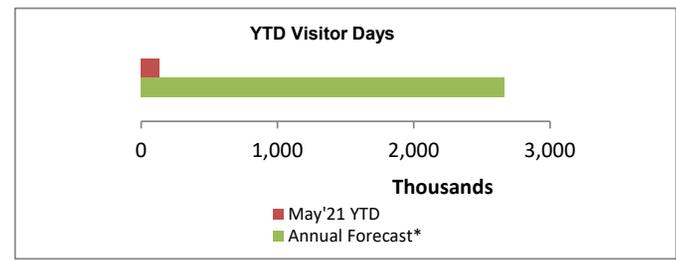
Key Performance Indicators					Key Performance Indicators		
	YOY Rate	May'19 YTD	May'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{5f}	N/A	606.7	17.2	449.3	O'ahu	-98.7%	1,561
Daily Spend (\$PPPD) ^{5f}	N/A	166.4	129.5	168.6	Maui	-98.2%	2,575
Visitor Days	-96.4%	3,646,133	132,862	2,664,375	Moloka'i	-99.2%	21
Arrivals	-98.4%	296,362	4,807	195,431	Lāna'i	-98.4%	49
Daily Census	-96.4%	24,147	880	7,300	Kaua'i	-99.6%	158
Airlift (scheduled seats)	-96.2%	289,796	11,080	245,510	Hawai'i Island	-98.4%	859

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diiō Mi flight schedules as of March 16, 2021, subject to change.
 May YTD 2021 visitor spending statistics were from January through February only. Spending data from March through May were not available due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

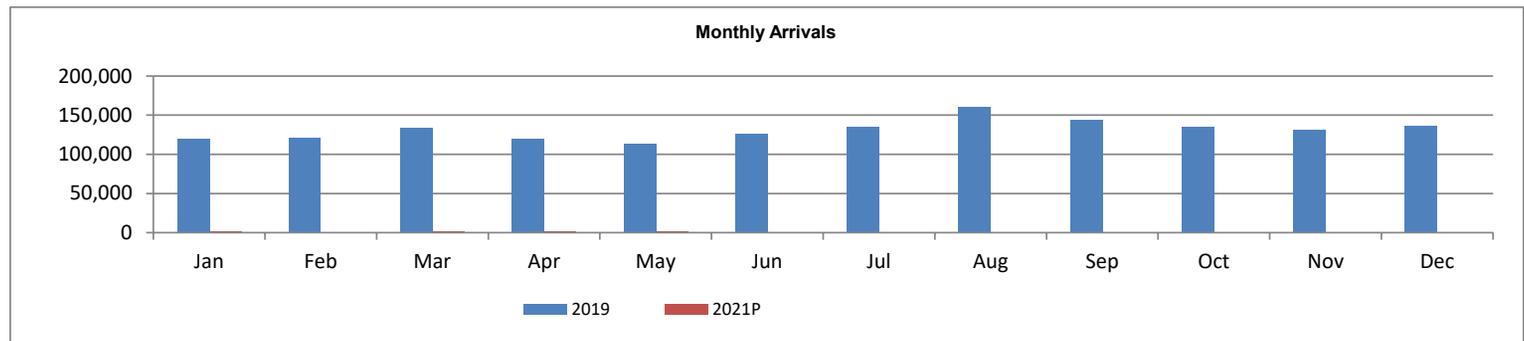
Visitor Industry Performance Measures

Market: **JAPAN**

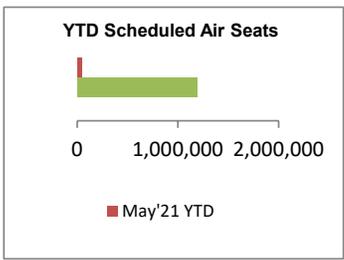
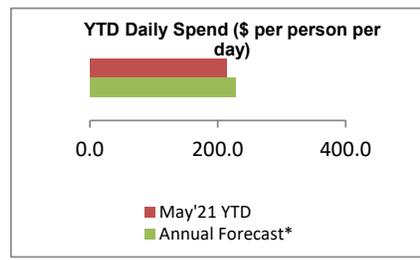
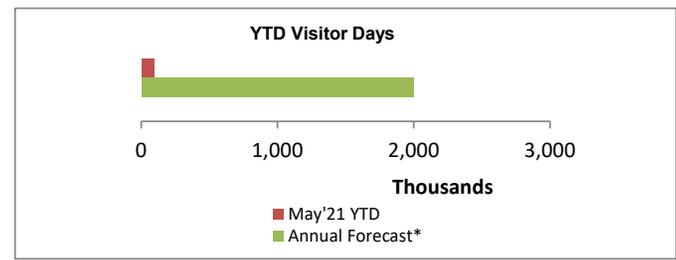
Key Performance Indicators					Key Performance Indicators		
	YOY Rate	May'19 YTD	May'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{6/}	-97.6%	850.4	20.4	454.4	O'ahu	-99.1%	5,385
Daily Spend (\$PPPD) ^{6/}	-10.8%	239.3	213.5	227.4	Maui	-99.4%	123
Visitor Days	-97.3%	3,553,482	95,369	1,998,302	Moloka'i	-99.2%	5
Arrivals	-99.1%	607,643	5,589	347,802	Lāna'i	-99.1%	7
Daily Census	-97.3%	23,533	632	5,475	Kaua'i	-99.6%	44
Airlift (scheduled seats)	-94.3%	825,902	47,385	1,187,421	Hawai'i Island	-99.7%	178

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diao Mi flight schedules as of March 16, 2021, subject to change.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

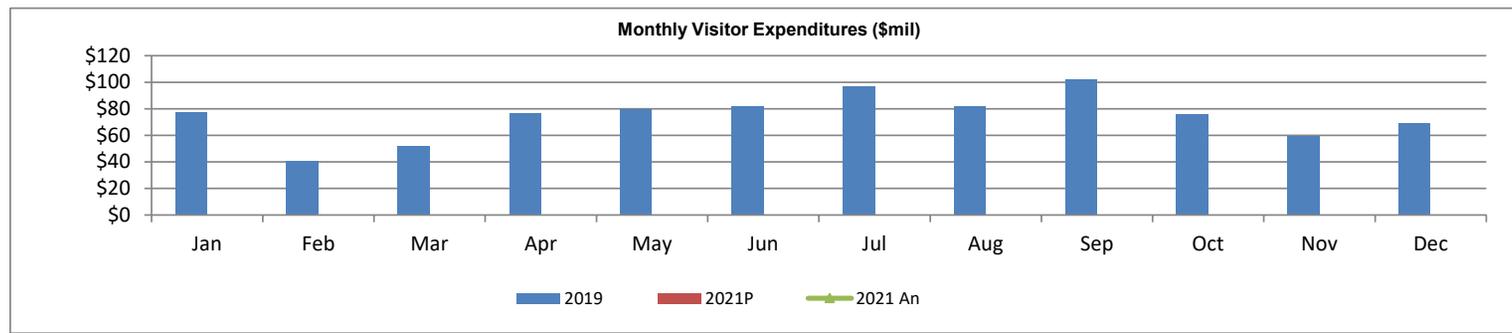
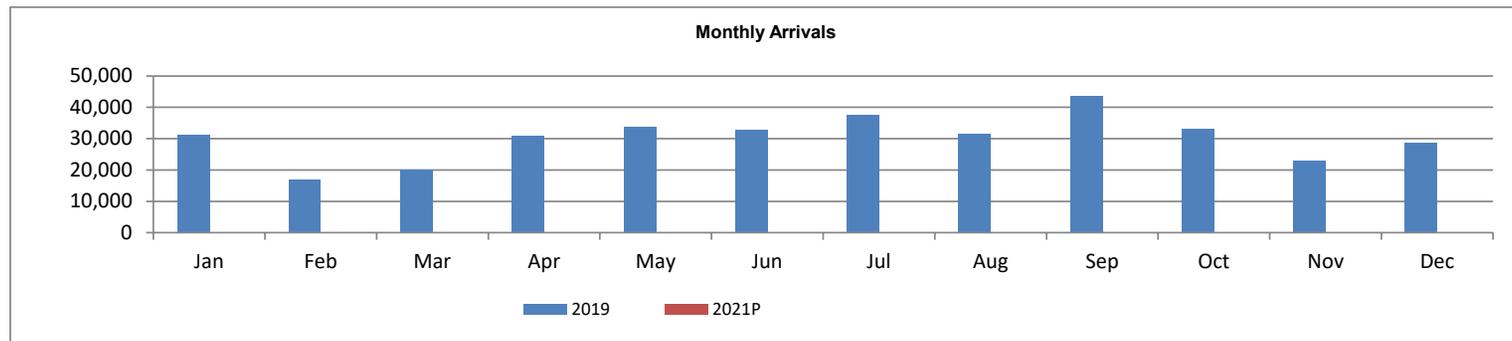
Market: **OCEANIA**

Key Performance Indicators

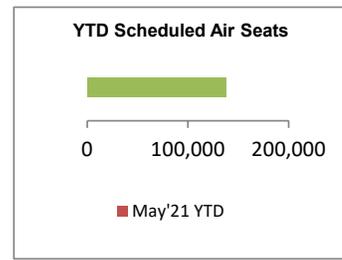
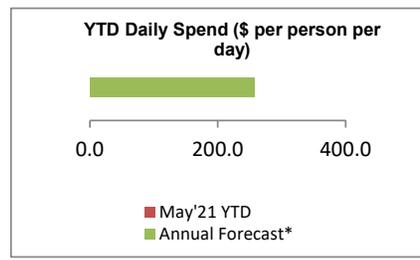
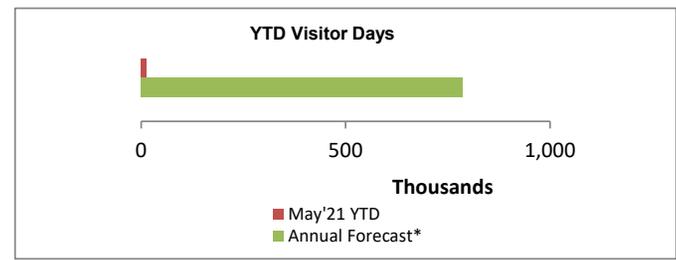
	YOY Rate	May'19 YTD	May'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{7/}	N/A	326.8	N/A	202.8	O'ahu	-99.7%	403
Daily Spend (\$PPPD) ^{7/}	N/A	263.1	N/A	258.0	Maui	-99.1%	191
Visitor Days	-99.0%	1,242,158	12,234	786,033	Moloka'i	-100.0%	-
Arrivals	-99.5%	133,172	691	82,654	Lāna'i	-99.9%	2
Daily Census	-99.0%	8,226	81	2,154	Kaua'i	-99.3%	82
Airlift (scheduled seats)	-100.0%	200,684	0	137,772	Hawai'i Island	-99.2%	129

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.
 May YTD 2021 visitor spending statistics were not available from January through May due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **EUROPE**

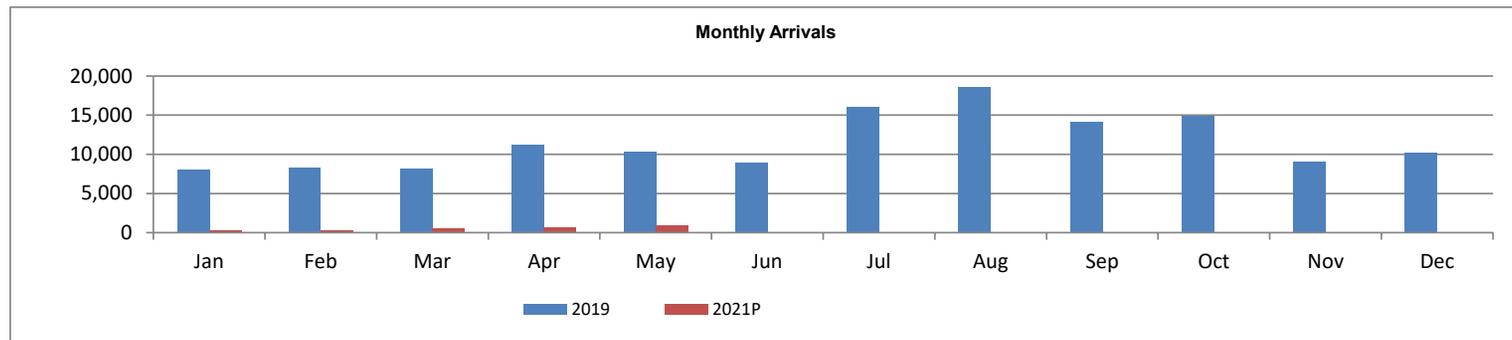
Key Performance Indicators

	YOY Rate	May'19 YTD	May'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{8/}	N/A	97.6	N/A	106.4
Daily Spend (\$PPPD) ^{8/}	N/A	164.4	N/A	146.7
Visitor Days	-92.8%	593,835	42,587	725,338
Arrivals	-93.8%	46,035	2,839	55,102
Daily Census	-92.8%	3,933	282	1,987
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

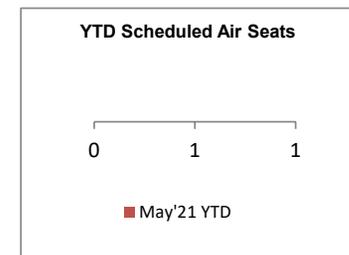
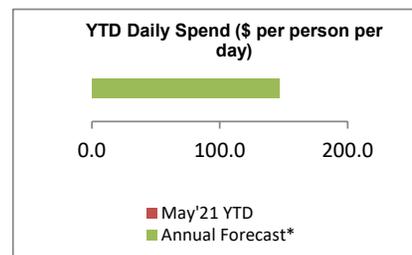
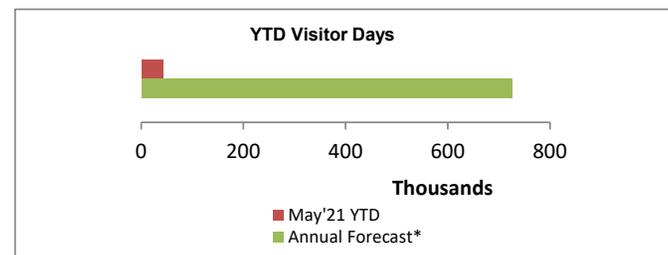
	YOY Rate	YTD
O'ahu	-95.4%	1,562
Maui	-95.4%	899
Moloka'i	-96.6%	23
Lāna'i	-94.7%	28
Kaua'i	-96.9%	333
Hawai'i Island	-95.2%	612

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.
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Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **OTHER ASIA**

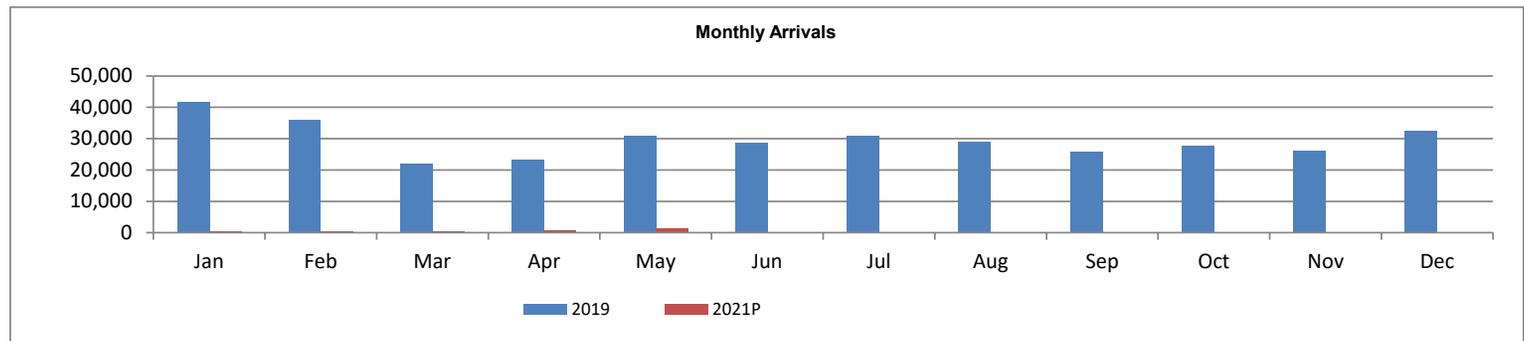
Key Performance Indicators

	YOY Rate	May'19 YTD	May'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{9/}	N/A	366.7	N/A	NA
Daily Spend (\$PPPD) ^{9/}	N/A	297.8	N/A	NA
Visitor Days	-94.5%	1,231,490	67,492	NA
Arrivals	-97.6%	153,953	3,627	NA
Daily Census	-94.5%	8,156	447	NA
Airlift (scheduled seats)	-100.0%	205,111	0	245,134

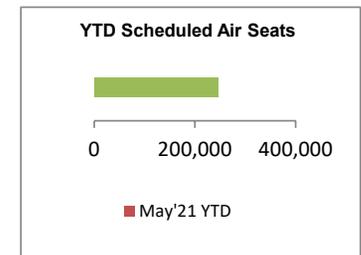
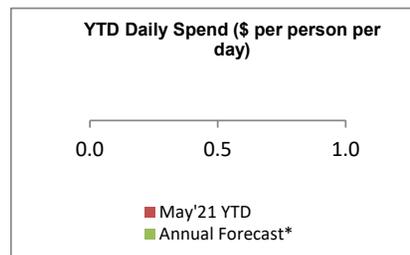
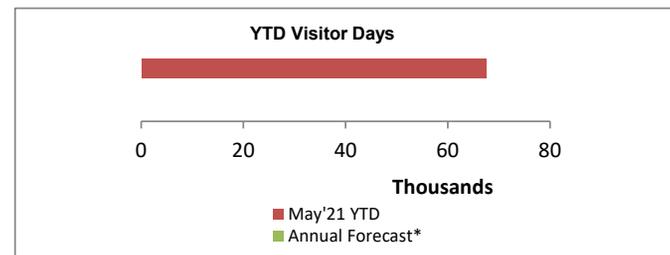
	YOY Rate	YTD
O'ahu	-98.1%	2,922
Maui	-97.6%	634
Moloka'i	-97.5%	19
Lāna'i	-97.0%	28
Kaua'i	-96.2%	226
Hawai'i Island	-97.9%	672

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.
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Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

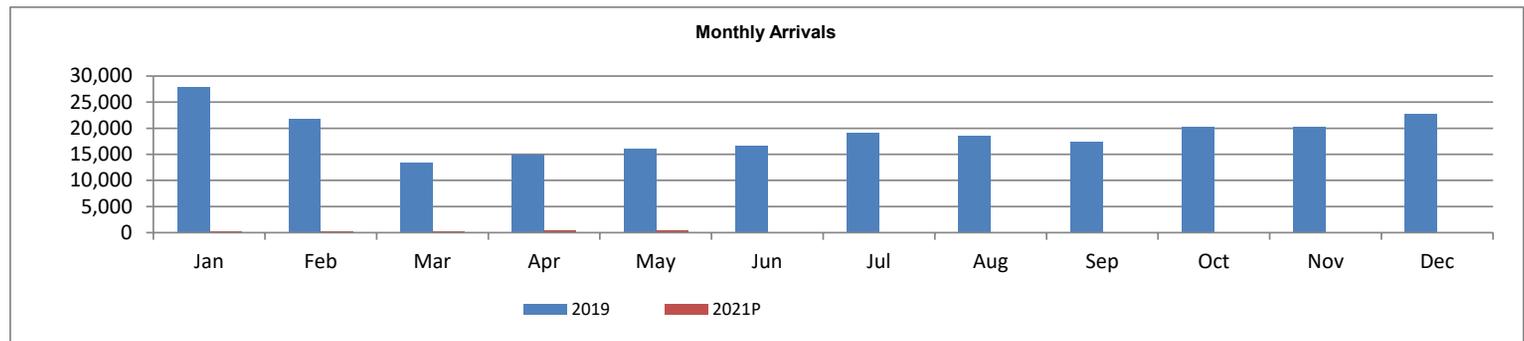
Visitor Industry Performance Measures

Market: **KOREA**

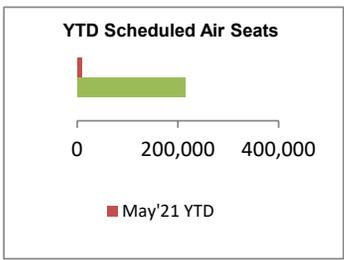
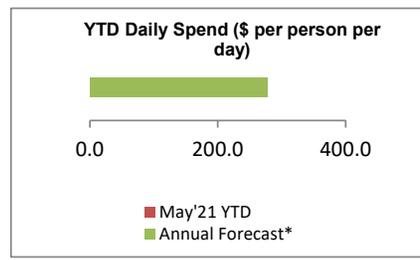
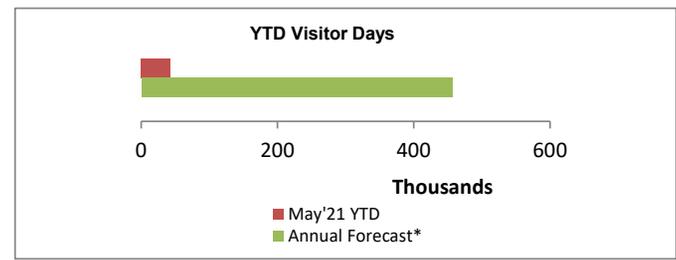
Key Performance Indicators					Key Performance Indicators		
	YOY Rate	May'19 YTD	May'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{10/}	N/A	204.2	N/A	127.0	O'ahu	-98.4%	1,480
Daily Spend (\$PPPD) ^{10/}	N/A	278.5	N/A	278.2	Maui	-98.7%	160
Visitor Days	-94.2%	733,030	42,846	456,698	Moloka'i	-99.4%	2
Arrivals	-98.2%	94,062	1,707	55,102	Lāna'i	-98.0%	6
Daily Census	-94.2%	4,855	284	1,251	Kaua'i	-98.1%	62
Airlift (scheduled seats)	-93.9%	136,117	8,340	214,534	Hawai'i Island	-98.5%	175

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.
 May YTD 2021 visitor spending statistics were not available from January through May due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **LATIN AMERICA**

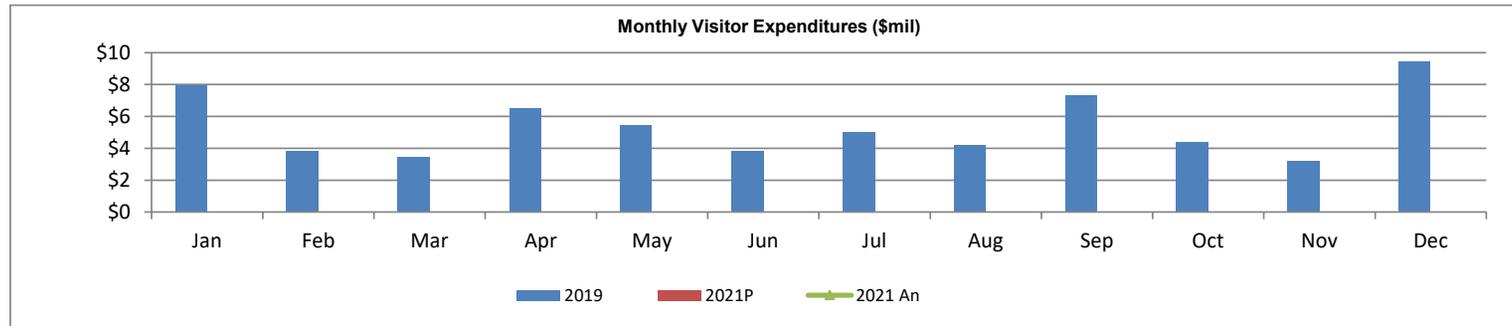
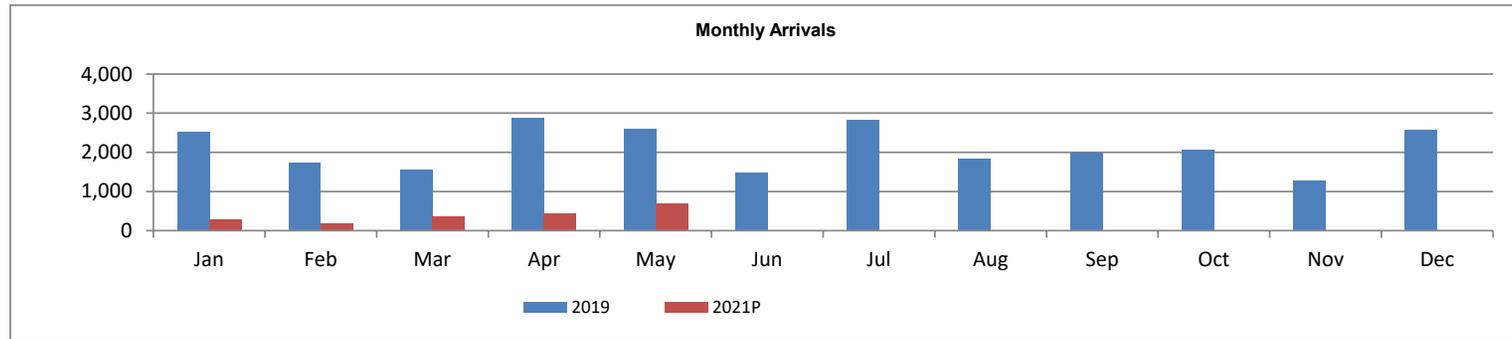
Key Performance Indicators

	YOY Rate	May'19 YTD	May'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{11/}	N/A	27.2	N/A	NA
Daily Spend (\$PPPD) ^{11/}	N/A	228.8	N/A	NA
Visitor Days	-77.3%	119,015	27,014	NA
Arrivals	-82.6%	11,306	1,962	NA
Daily Census	-77.3%	788	179	NA
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

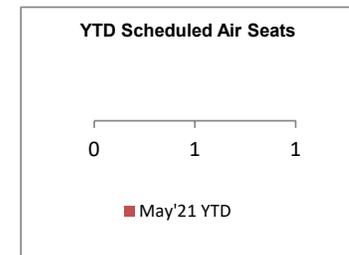
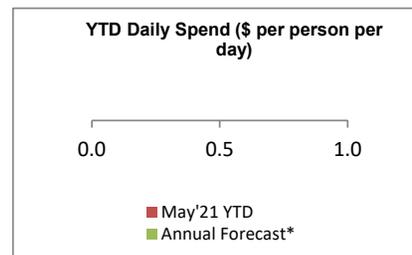
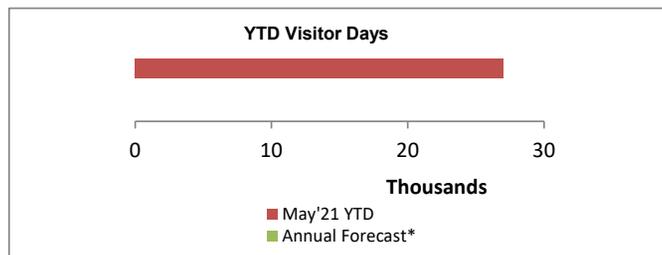
	YOY Rate	YTD
O'ahu	-85.6%	1,268
Maui	-80.2%	758
Moloka'i	-90.1%	8
Lāna'i	-88.2%	27
Kaua'i	-91.5%	118
Hawai'i Island	-82.7%	356

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.
 May YTD 2021 visitor spending statistics were not available from January through May due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **OVERALL**

Key Performance Indicators

	YOY Rate	May'20 YTD	May'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{1/}	N/A	N/A	3,427.3	9,711.8
Daily Spend (\$PPPD) ^{1/}	N/A	N/A	173.5	185.4
Visitor Days	-1.0%	19,945,481	19,753,038	52,372,004
Arrivals	-8.3%	2,139,166	1,960,796	5,510,247
Daily Census	-0.3%	131,220	130,815	143,485
Airlift (scheduled seats)	-2.2%	3,409,056	3,334,834	11,882,593

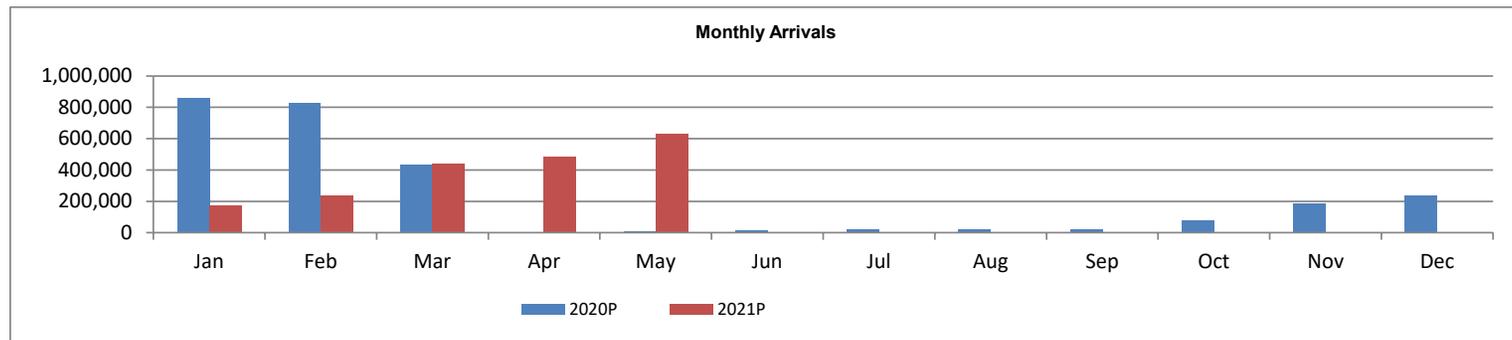
	YOY Rate	YTD
O'ahu	-25.0%	925,147
Maui	19.6%	723,536
Moloka'i	-49.1%	7,319
Lāna'i	-14.0%	12,827
Kaua'i	-50.0%	141,392
Hawai'i Island	-11.0%	349,080

^{1/} DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of May 25, 2021, subject to change.

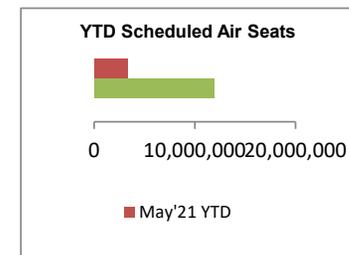
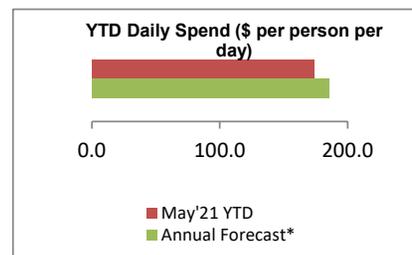
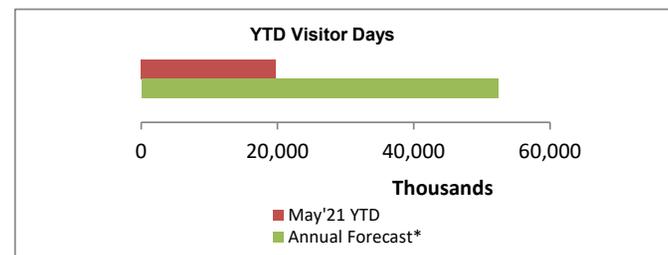
^{2/} May YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

^{3/} May YTD 2021 visitor spending statistics were from U.S. West, U.S. East, and Japan. Spending data from Canada were from January through February only; and data from all other markets were not available due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

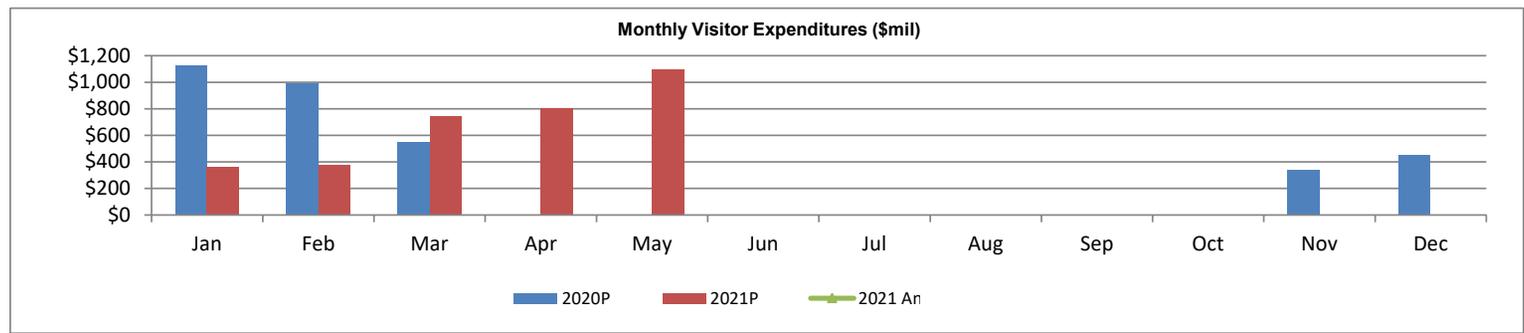
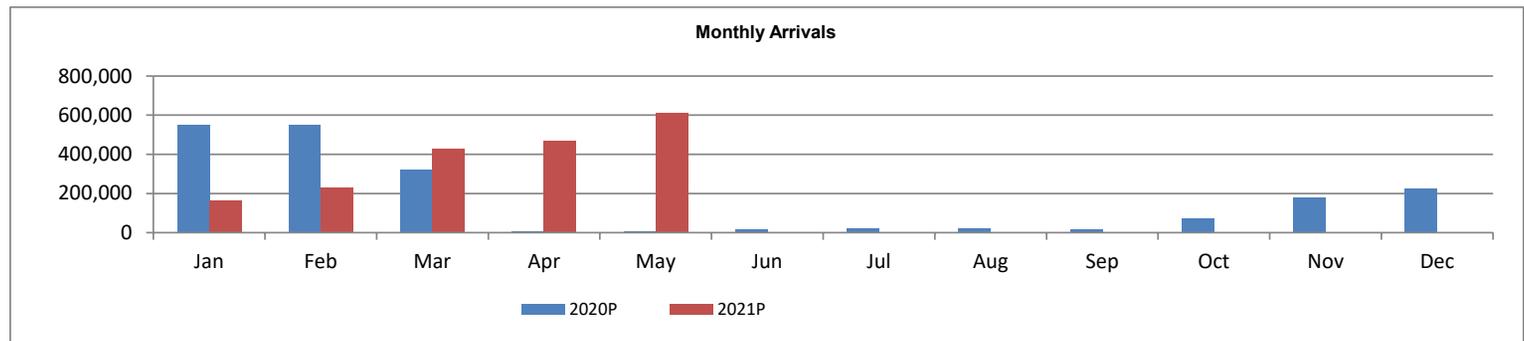
Visitor Industry Performance Measures

Market: **U.S. TOTAL**

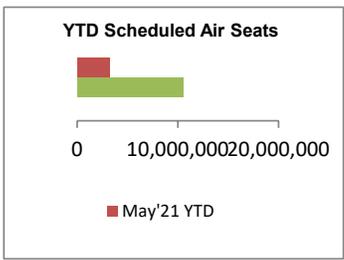
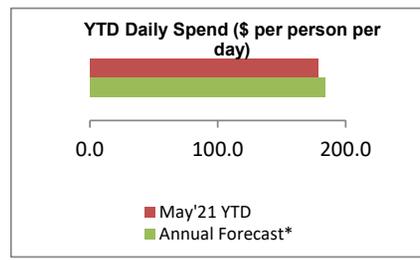
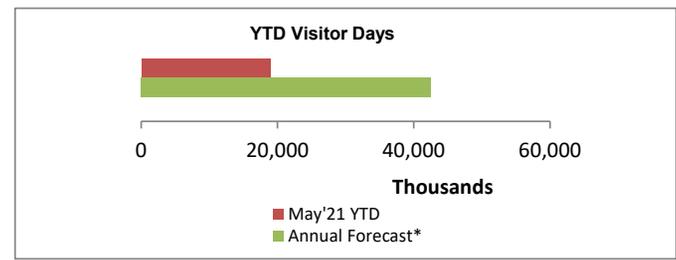
Key Performance Indicators					Key Performance Indicators		
	YOY Rate	May'20 YTD	May'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{2f}	N/A	N/A	3,389.7	7,833.4	O'ahu	27.1%	890,493
Daily Spend (\$PPPD) ^{2f}	N/A	N/A	178.8	184.1	Maui	47.6%	707,755
Visitor Days	37.1%	13,832,184	18,958,543	42,553,079	Moloka'i	-27.4%	7,073
Arrivals	32.6%	1,435,925	1,904,640	4,403,876	Lāna'i	7.7%	12,454
Daily Census	38.0%	91,001	125,553	116,584	Kaua'i	-41.0%	137,978
Airlift (scheduled seats)	27.8%	2,517,950	3,217,019	10,489,752	Hawai'i Island	20.7%	340,911

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of May 25, 2021, subject to change.
 May YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **U.S. WEST**

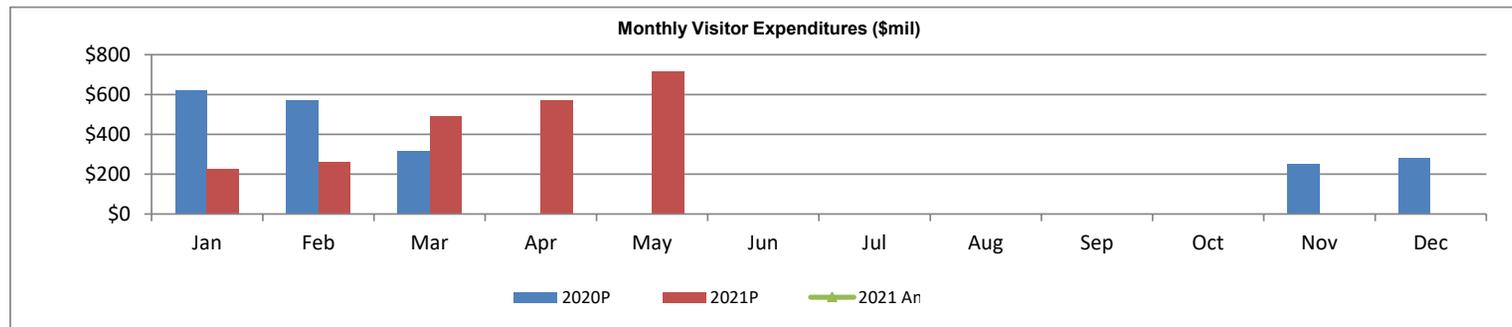
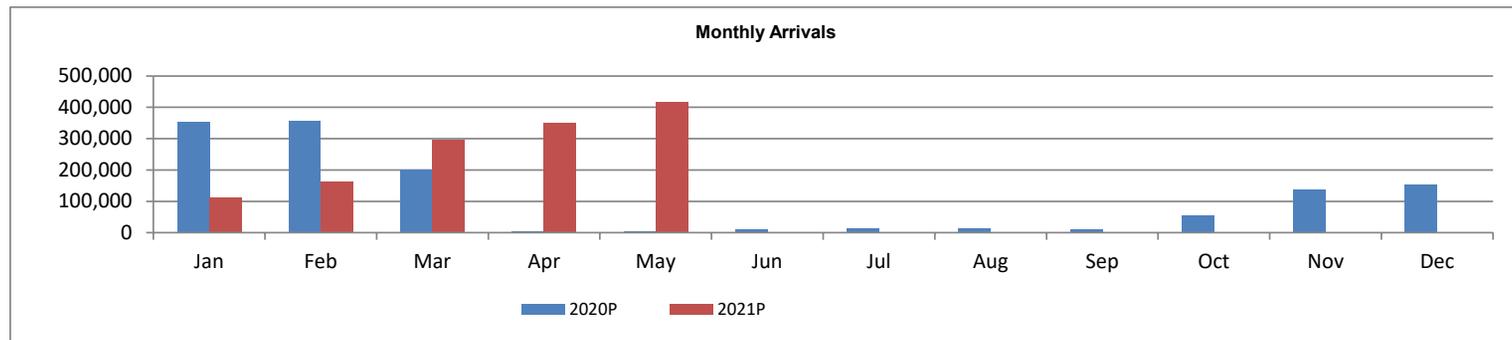
Key Performance Indicators

	YOY Rate	May'20 YTD	May'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{3/}	N/A	N/A	2,271.3	4,850.7
Daily Spend (\$PPPD) ^{3/}	N/A	N/A	175.3	173.0
Visitor Days	54.3%	8,397,384	12,953,932	28,031,536
Arrivals	46.5%	917,741	1,344,101	3,002,696
Daily Census	55.3%	55,246	85,788	76,799
Airlift (scheduled seats)	29.8%	2,185,115	2,836,598	9,170,935

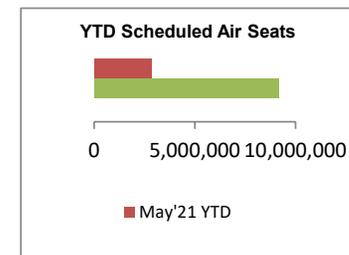
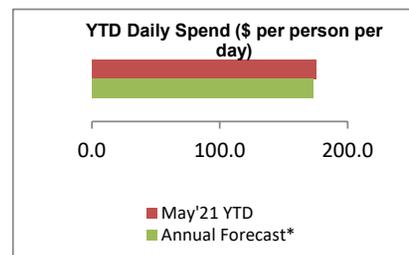
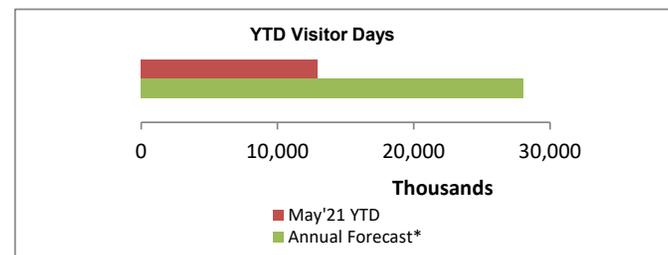
	YOY Rate	YTD
O'ahu	40.5%	575,668
Maui	74.0%	515,135
Moloka'i	-18.6%	4,718
Lāna'i	26.1%	7,745
Kaua'i	-33.4%	95,243
Hawai'i Island	38.8%	242,469

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Dilo Mi flight schedules as of May 25, 2021, subject to change.
 May YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **U.S. EAST**

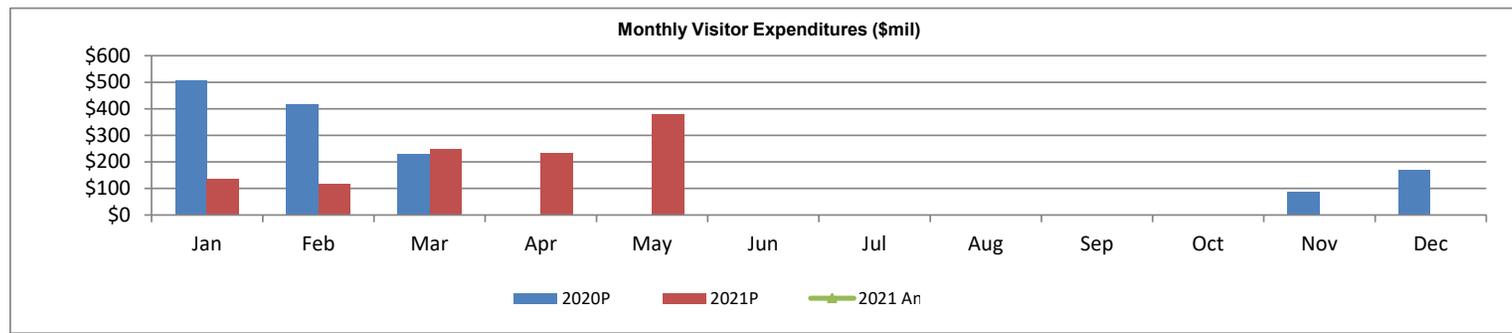
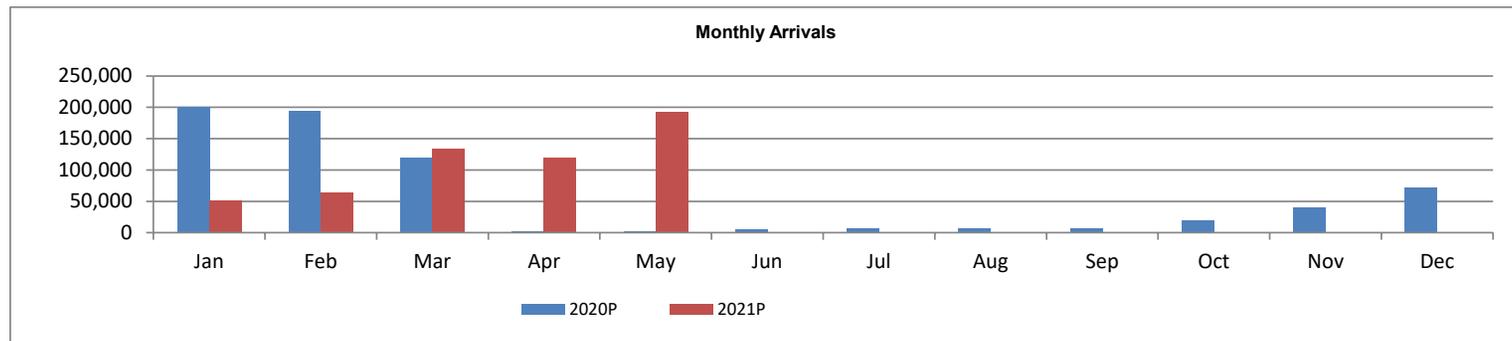
Key Performance Indicators

	YOY Rate	May'20 YTD	May'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{4f}	N/A	N/A	1,118.4	2,982.6
Daily Spend (\$PPPD) ^{4f}	N/A	N/A	186.3	205.4
Visitor Days	10.5%	5,434,801	6,004,611	14,521,543
Arrivals	8.2%	518,185	560,540	1,401,180
Daily Census	11.2%	35,755	39,766	39,785
Airlift (scheduled seats)	14.3%	332,835	380,421	1,318,817

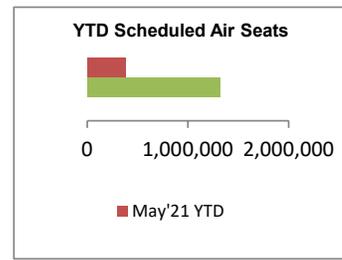
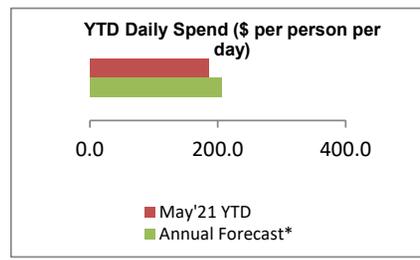
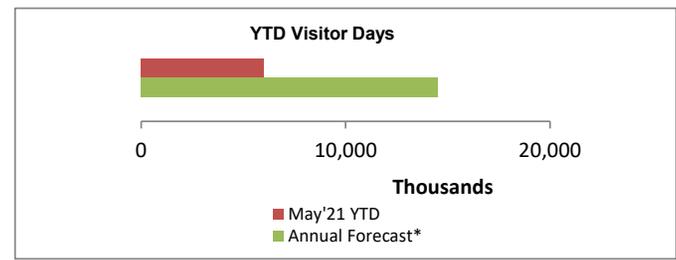
	YOY Rate	YTD
O'ahu	8.2%	314,825
Maui	4.9%	192,620
Moloka'i	-40.3%	2,355
Lāna'i	-13.2%	4,709
Kaua'i	-53.0%	42,735
Hawai'i Island	-8.7%	98,442

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Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **CANADA**

Key Performance Indicators

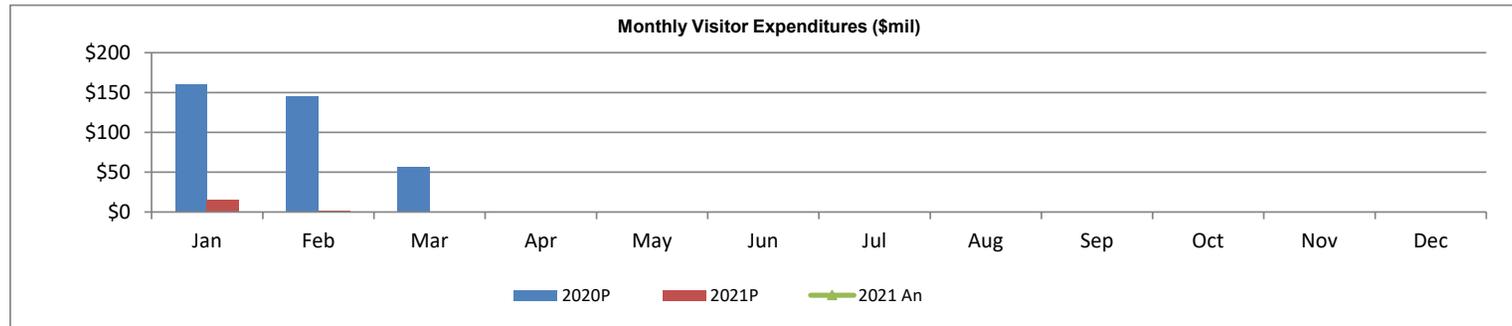
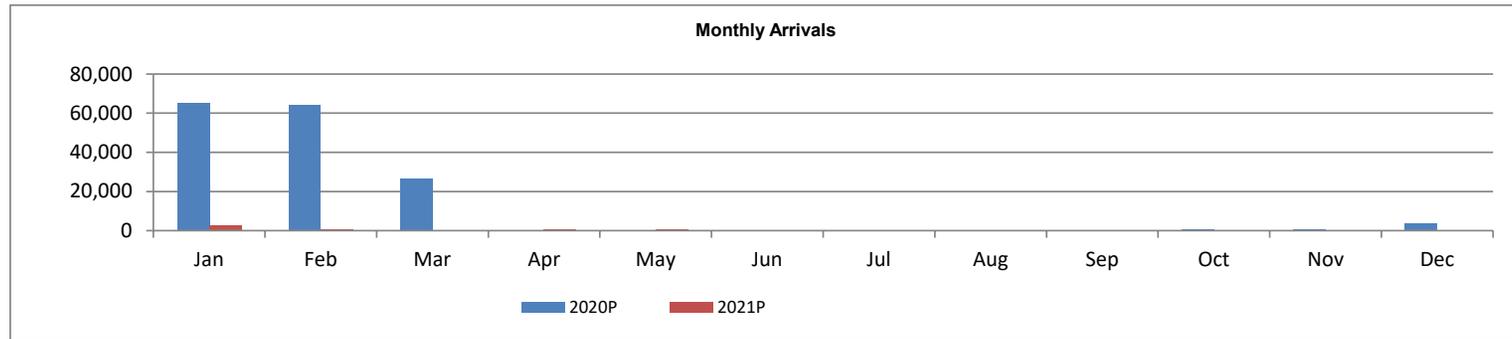
	YOY Rate	May'20 YTD	May'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{5f}	N/A	N/A	17.2	449.3	O'ahu	-97.5%	1,561
Daily Spend (\$PPPD) ^{5f}	N/A	N/A	129.5	168.6	Maui	-96.4%	2,575
Visitor Days	-93.5%	2,054,280	132,862	2,664,375	Moloka'i	-98.0%	21
Arrivals	-96.9%	155,764	4,807	195,431	Lāna'i	-96.9%	49
Daily Census	-93.5%	13,515	880	7,300	Kaua'i	-99.3%	158
Airlift (scheduled seats)	-93.3%	164,881	11,080	142,350	Hawai'i Island	-97.6%	859

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Dilo Mi flight schedules as of May 25, 2021, subject to change.

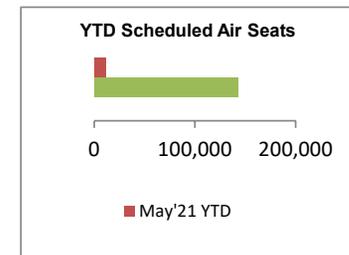
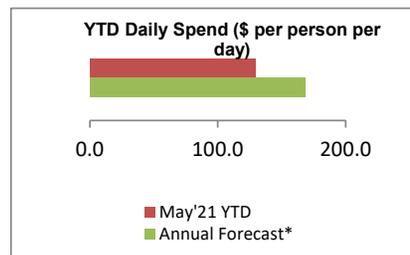
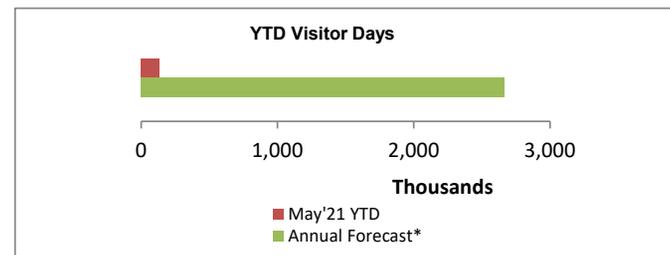
^{5f} May YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

^a May YTD 2021 visitor spending statistics were from January through February only. Spending data from March through April were not available due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **JAPAN**

Key Performance Indicators

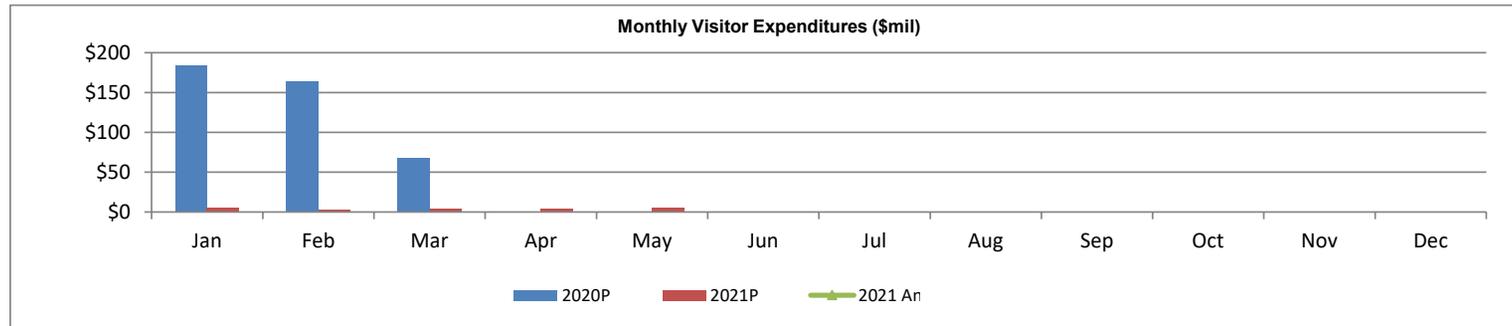
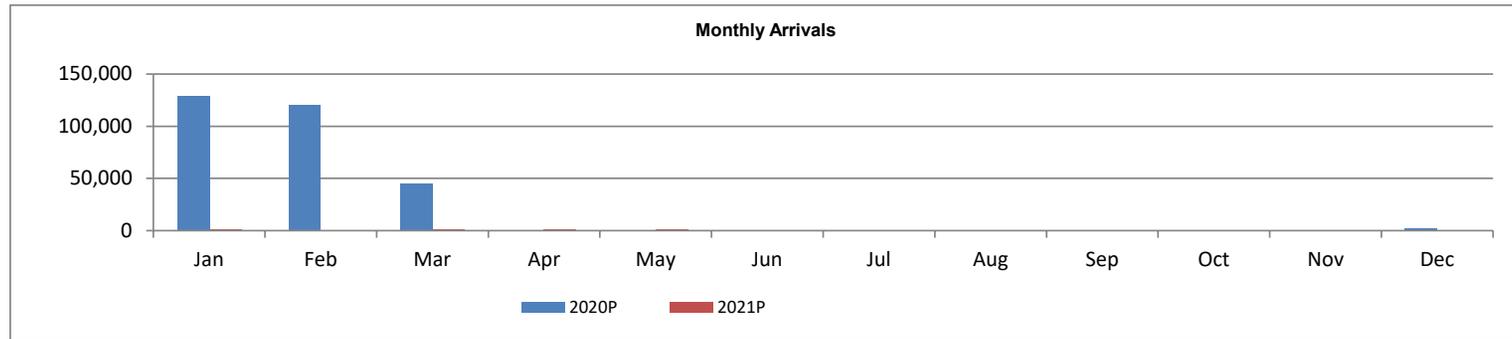
	YOY Rate	May'20 YTD	May'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{6f}	N/A	N/A	20.4	454.4	O'ahu	-98.0%	5,385
Daily Spend (\$PPPD) ^{6f}	N/A	N/A	213.5	227.4	Maui	-98.5%	123
Visitor Days	-94.5%	1,730,457	95,369	1,998,302	Moloka'i	-98.9%	5
Arrivals	-98.1%	294,255	5,589	347,802	Lāna'i	-94.9%	7
Daily Census	-94.5%	11,385	632	5,475	Kaua'i	-98.8%	44
Airlift (scheduled seats)	-89.8%	466,072	47,385	692,529	Hawai'i Island	-99.5%	178

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diiō Mi flight schedules as of May 25, 2021, subject to change.

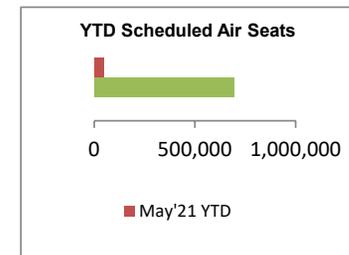
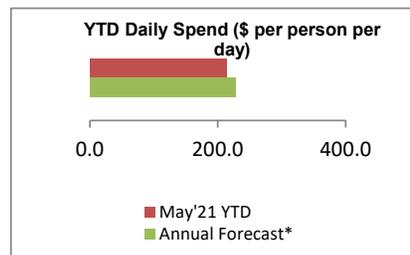
May YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

M

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **OCEANIA**

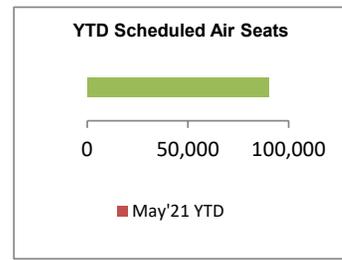
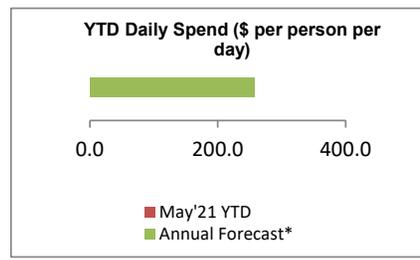
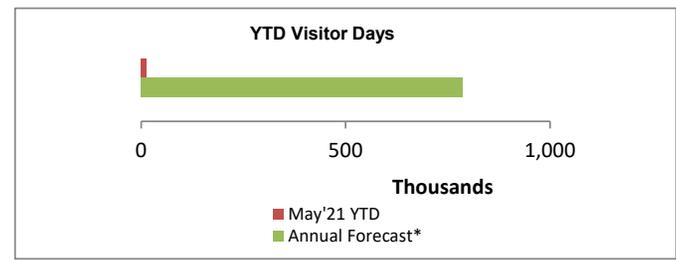
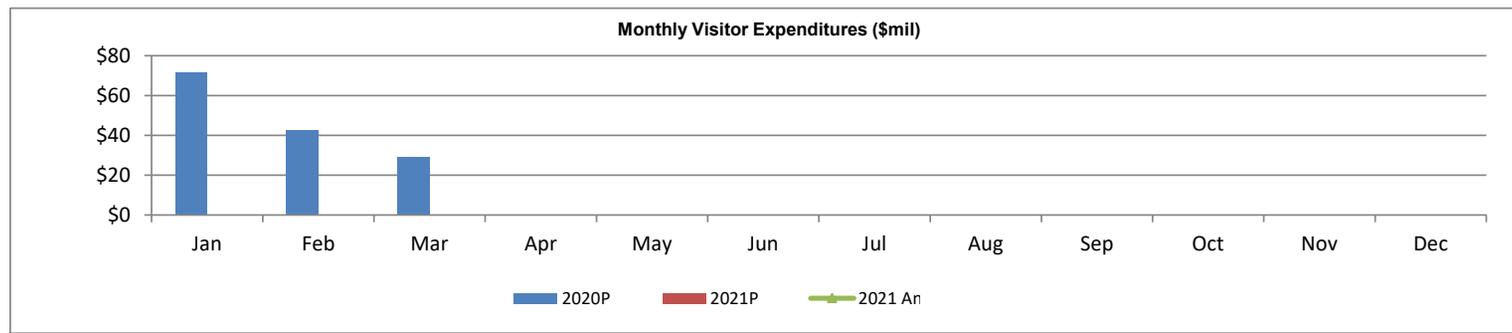
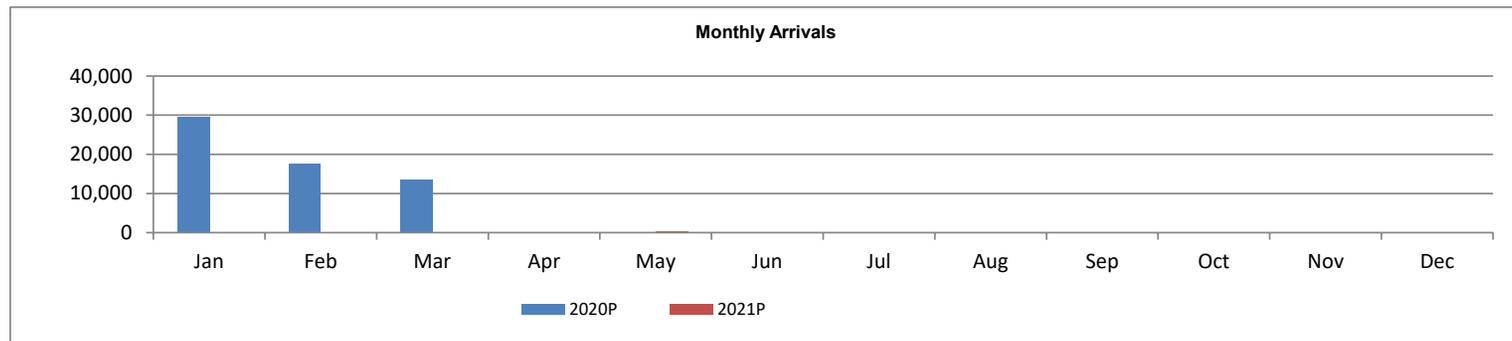
	YOY Rate	May'20 YTD	May'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{7f}	N/A	N/A	N/A	202.8	O'ahu	-99.3%	403
Daily Spend (\$PPPD) ^{7f}	N/A	N/A	N/A	258.0	Maui	-97.8%	191
Visitor Days	-97.8%	567,119	12,234	786,033	Moloka'i	-100.0%	-
Arrivals	-98.9%	60,780	691	82,654	Lāna'i	-99.8%	2
Daily Census	-97.8%	3,731	81	2,154	Kaua'i	-98.4%	82
Airlift (scheduled seats)	-100.0%	95,737	0	89,956	Hawai'i Island	-98.3%	129

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of May 25, 2021, subject to change.

^{7f} May YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

^a May YTD 2021 visitor spending statistics were not available from January through April due to limited samples.

Monthly Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **EUROPE**

Key Performance Indicators

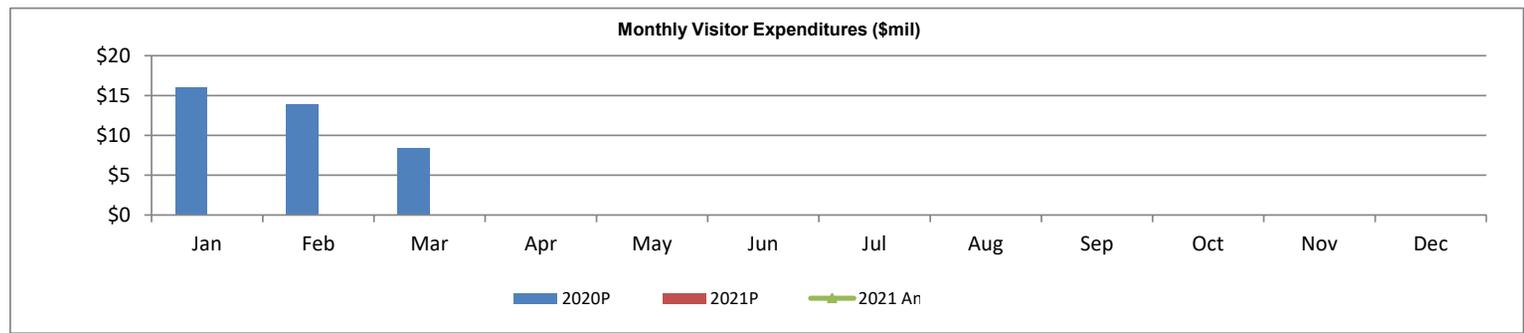
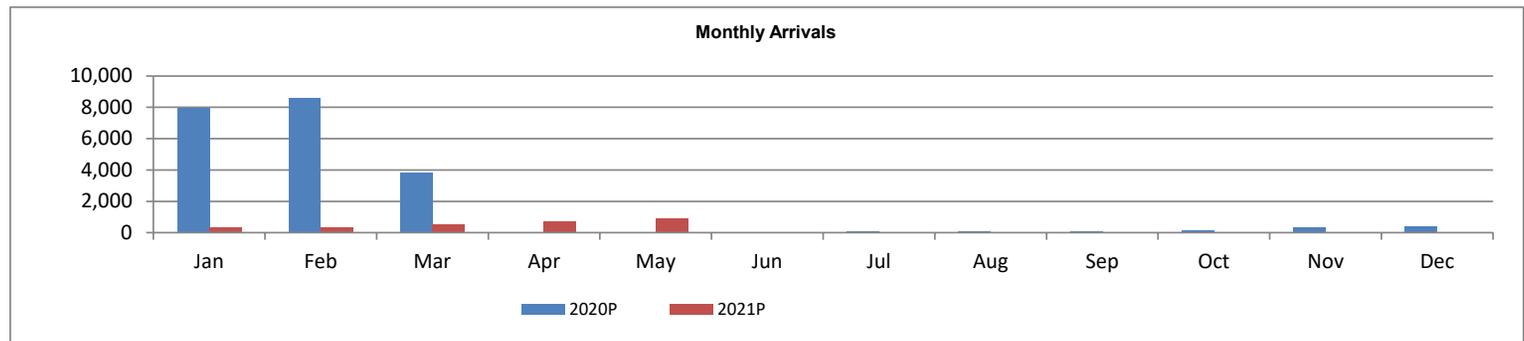
	YOY Rate	May'20 YTD	May'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{8/}	N/A	N/A	N/A	106.4	O'ahu	-89.4%	1,562
Daily Spend (\$PPPD) ^{8/}	N/A	N/A	N/A	146.7	Maui	-89.2%	899
Visitor Days	-84.2%	269,114	42,587	725,338	Moloka'i	-93.7%	23
Arrivals	-86.1%	20,444	2,839	55,102	Lāna'i	-88.5%	28
Daily Census	-84.1%	1,770	282	1,987	Kaua'i	-93.2%	333
Airlift (scheduled seats)	N/A	N/A	N/A	N/A	Hawai'i Island	-90.6%	612

^{8/} DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of May 25, 2021, subject to change.

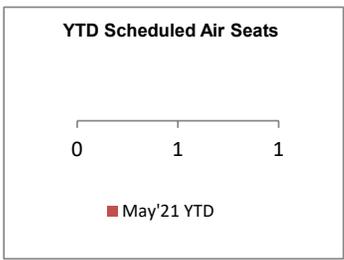
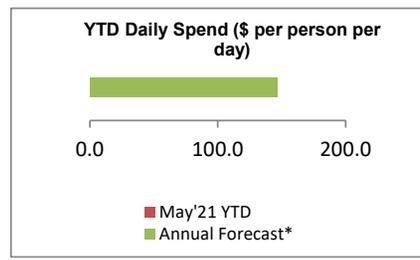
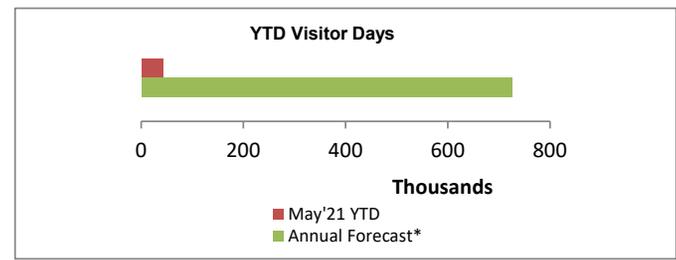
^{8/} May YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

^a May YTD 2021 visitor spending statistics were not available from January through April due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **OTHER ASIA**

Key Performance Indicators

	YOY Rate	May'20 YTD	May'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{9f}	N/A	N/A	N/A	NA
Daily Spend (\$PPPD) ^{9f}	N/A	N/A	N/A	NA
Visitor Days	-86.2%	488,988	67,492	NA
Arrivals	-93.6%	57,005	3,627	NA
Daily Census	-86.1%	3,217	447	NA
Airlift (scheduled seats)	-100.0%	86,695	0	127,746

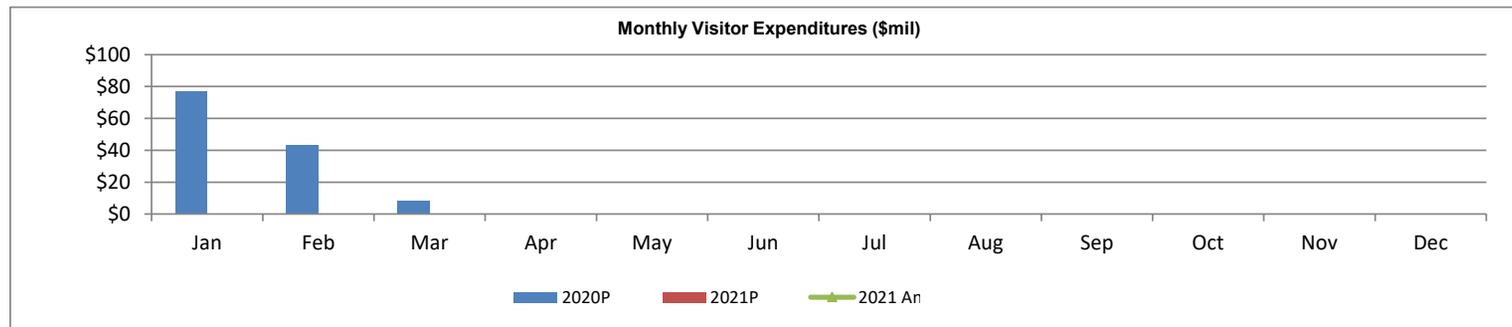
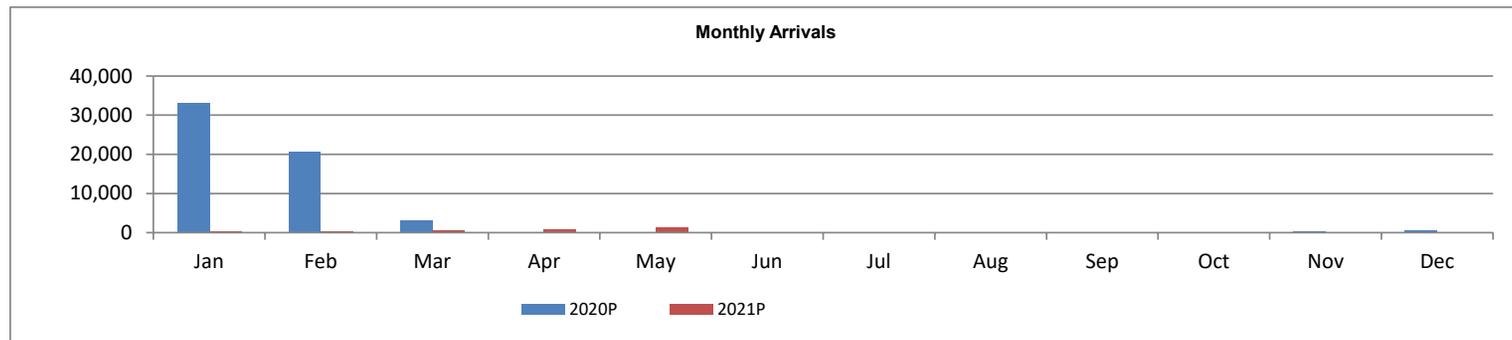
	YOY Rate	YTD
O'ahu	-94.7%	2,922
Maui	-92.0%	634
Moloka'i	-88.2%	19
Lāna'i	-86.2%	28
Kaua'i	-89.1%	226
Hawai'i Island	-94.2%	672

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of May 25, 2021, subject to change.

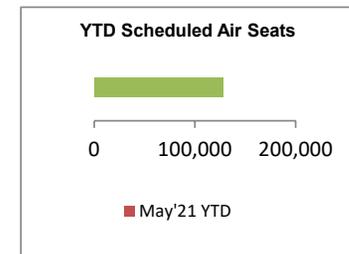
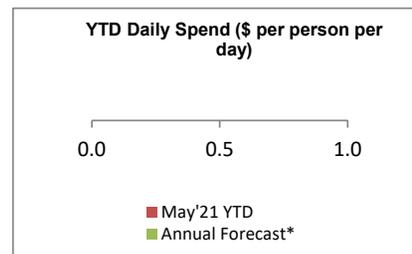
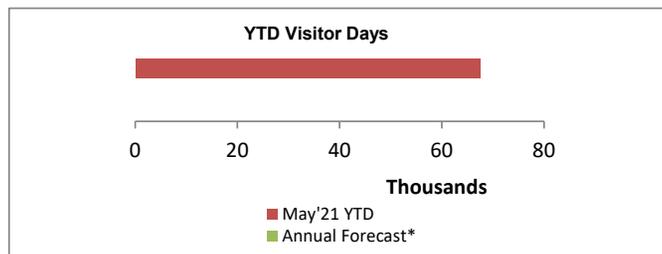
^{9f} May YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

^a May YTD 2021 visitor spending statistics were not available from January through April due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **KOREA**

Key Performance Indicators

	YOY Rate	May'20 YTD	May'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{10/}	N/A	N/A	N/A	127.0
Daily Spend (\$PPPD) ^{10/}	N/A	N/A	N/A	278.2
Visitor Days	-87.7%	348,453	42,846	456,698
Arrivals	-95.9%	41,650	1,707	55,102
Daily Census	-87.6%	2,292	284	1,251
Airlift (scheduled seats)	-88.3%	71,175	8,340	105,102

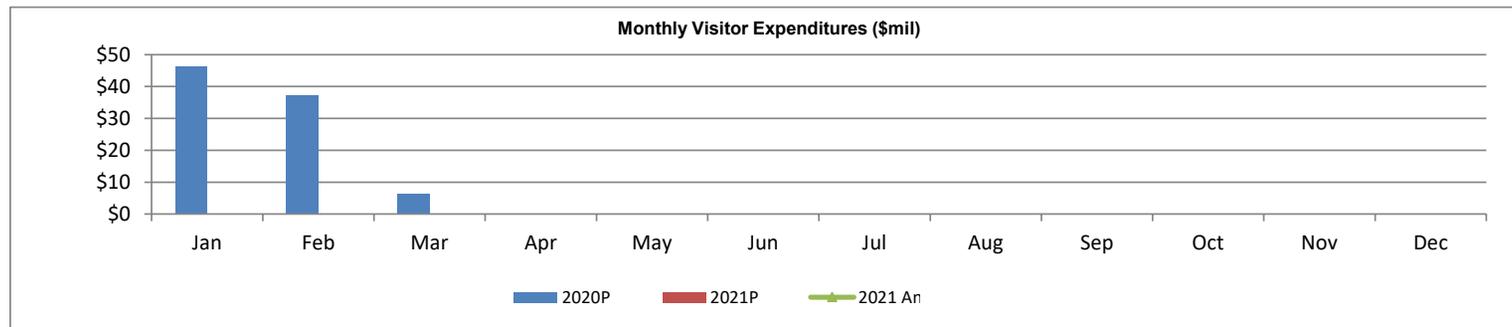
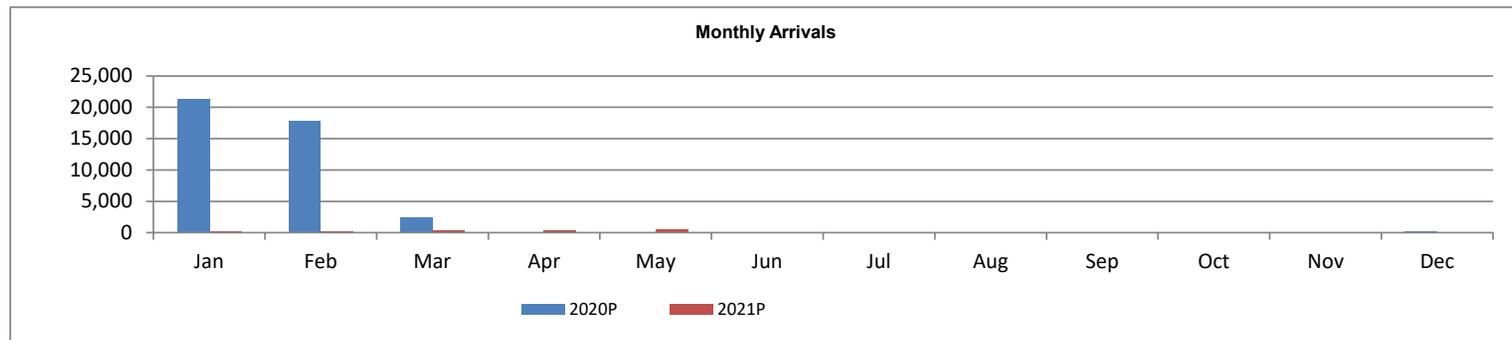
	YOY Rate	YTD
O'ahu	-96.4%	1,480
Maui	-96.1%	160
Moloka'i	-96.5%	2
Lāna'i	-93.2%	6
Kaua'i	-94.9%	62
Hawai'i Island	-97.1%	175

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of May 25, 2021, subject to change.

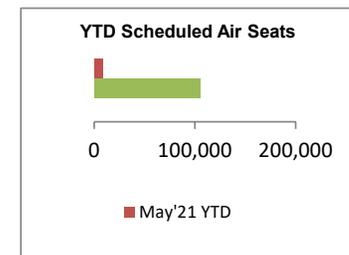
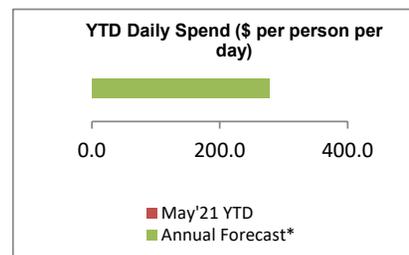
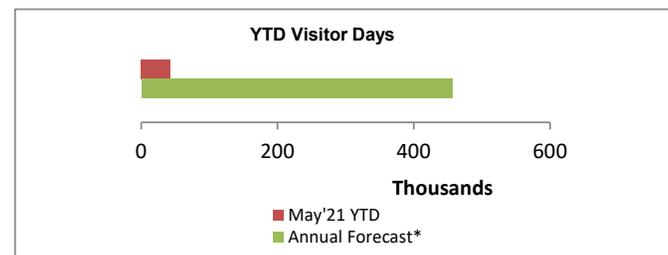
^{10/} May YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

^a May YTD 2021 visitor spending statistics were not available from January through April due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **May-21** Preliminary

Visitor Industry Performance Measures

Market: **LATIN AMERICA**

Key Performance Indicators

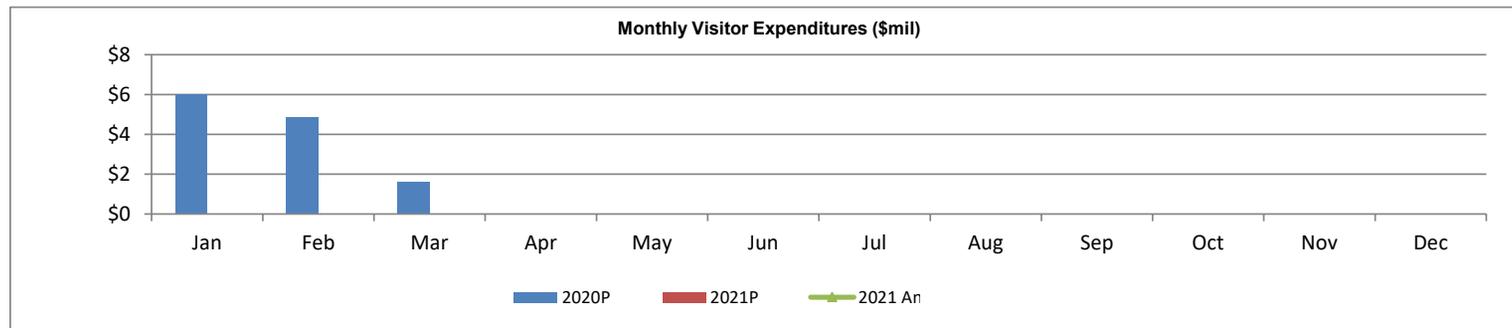
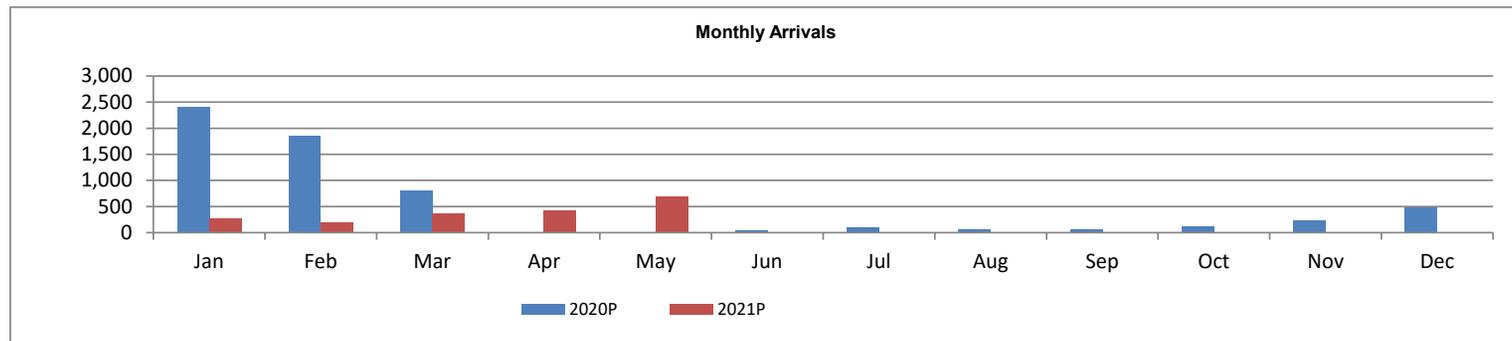
	YOY Rate	May'20 YTD	May'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{11/}	N/A	N/A	N/A	NA	O'ahu	-67.3%	1,268
Daily Spend (\$PPPD) ^{11/}	N/A	N/A	N/A	NA	Maui	-55.7%	758
Visitor Days	-50.0%	53,993	27,014	NA	Moloka'i	-62.3%	8
Arrivals	-61.3%	5,074	1,962	NA	Lāna'i	-46.2%	27
Daily Census	-49.6%	355	179	NA	Kaua'i	-79.3%	118
Airlift (scheduled seats)	N/A	N/A	N/A	N/A	Hawai'i Island	-53.0%	356

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of May 25, 2021, subject to change.

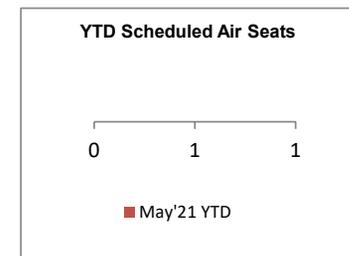
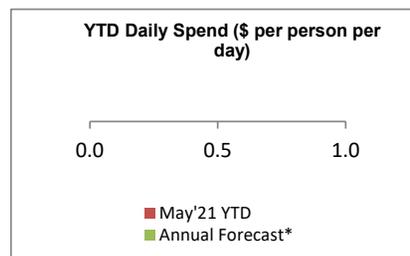
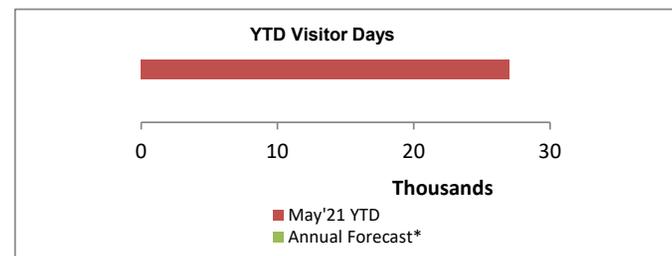
^{11/} May YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

^a May YTD 2021 visitor spending statistics were not available from January through April due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

Market Insights – June 2021

The HTA Monthly Market Insights reports on the most recent key performance indicators that the Hawai'i Tourism Authority (HTA) uses to measure success. The following measures provide indicators of the overall health of Hawai'i's visitor industry and help to gauge if the HTA is successfully attaining its goals.

Report on Economic Impact

During June 2021, most passengers arriving from out-of-state and traveling inter-county could bypass the State's mandatory 10-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner prior to their departure to Hawai'i through the Safe Travels program. In addition, individuals who were fully vaccinated in Hawai'i could bypass the quarantine order beginning June 15, 2021. Inter-county travel restrictions were lifted also as of June 15, 2021. The U.S. Centers for Disease Control and Prevention (CDC) enforced restrictions on cruise ships through a "Conditional Sail Order."

For the first half of 2021, Hawai'i's tourism economy experienced:

- Total visitor spending: \$4.86 billion.¹ There is no comparative visitor spending data available for the first half of 2020. Visitor spending declined 45.1 percent from \$8.86 billion in the first half of 2019.
- Visitor Arrivals: 2,751,849, up 27.6 percent compared to the first half of 2020. Total arrivals decreased 46.8 percent when compared to 5,171,182 visitors in the first half of 2019.
- Through June 2021, the state collected \$209.1 million in TAT, a 62.7 percent decrease compared to FY 2020 through June 2020 (Preliminary data from Dept of Taxation).
- Flights: 21,160, Seats: 4,343,333; compared to 15,996 flights and 3,557,108 seats in the first half of 2020, versus 30,729 flights and 6,750,177 seats in the first half of 2019.

Table 1: Overall Key Performance Indicators – Total (Air + Cruise) – YTD June 2021 vs. YTD June 2020

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A ^{2/}	4,864.4 ^{1/}	9,711.8
Daily Spend (\$PPPD)	N/A	N/A ^{2/}	177.3 ^{1/}	185.4
Visitor Days	34.5%	20,402,181	27,431,121	52,372,004
Arrivals	27.6%	2,156,234	2,751,849	5,510,247
Daily Census	35.2%	112,100	151,553	143,485
Airlift (scheduled seats)	22.8%	3,519,173	4,322,816	11,882,593

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

^{1/}Year-to-date June 2021 visitor spending statistics were from U.S. West, U.S. East, Japan, and Canada (Canada data were only available for January and February). Spending data for visitors from the other markets were not available due to limited samples.

^{2/}June year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID-19.

Table 2: Overall Key Performance Indicators – Total (Air + Cruise) – YTD June 2021 vs. YTD June 2019

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	-45.1%	8,857.8	4,864.4 ^{1/}	9,711.8
Daily Spend (\$PPPD)	-9.4%	195.8	177.3 ^{1/}	185.4
Visitor Days	-39.4%	45,242,600	27,431,121	52,372,004
Arrivals	-46.8%	5,171,182	2,751,849	5,510,247
Daily Census	-39.4%	249,959	151,553	143,485
Airlift (scheduled seats)	-35.5%	6,702,620	4,322,816	11,882,593

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

^{1/}Year-to-date June 2021 visitor spending statistics were from U.S. West, U.S. East, Japan, and Canada (Canada data were only available for January and February). Spending data for visitors from the other markets were not available due to limited samples.

Figure 1: Monthly Visitor Expenditures (\$mil) – 2021 vs. 2020

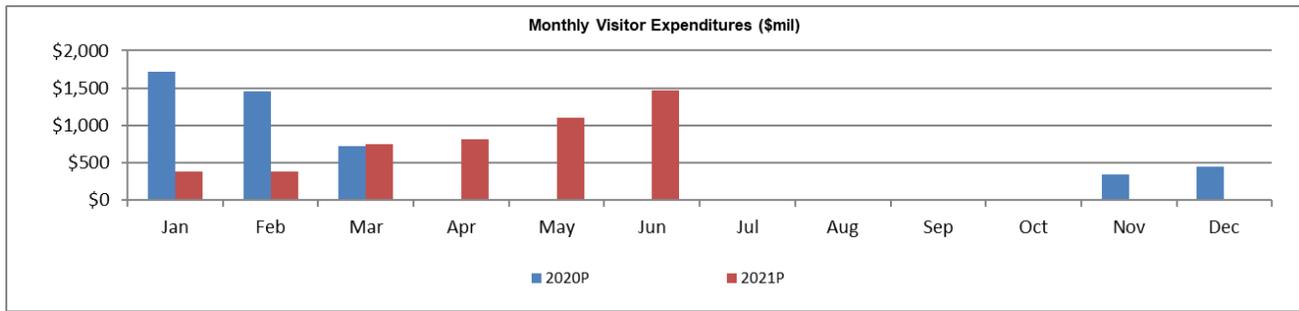
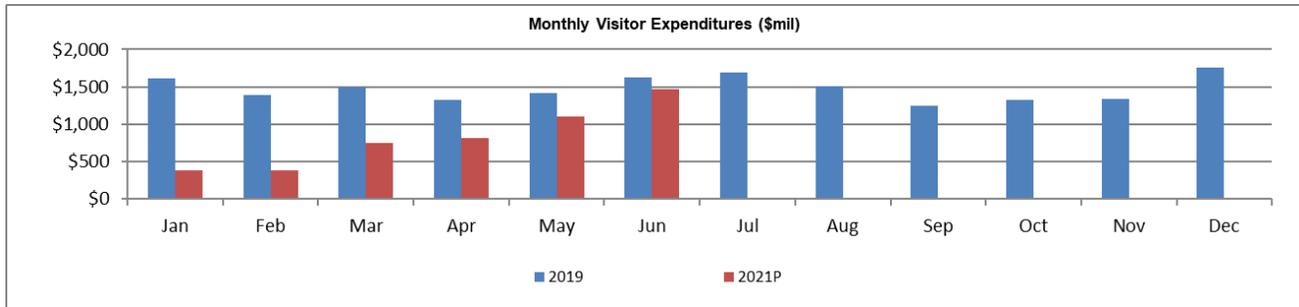


Figure 2: Monthly Visitor Expenditures (\$mil) – 2021 vs. 2019



Major Market Areas (MMAs)

USA

Table 3: Key Performance Indicators - U.S. Total (YTD June 2021 vs. YTD June 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A†	4,819.5	7,833.4
Daily Spend (\$PPPD)	N/A	N/A†	182.7	184.1
Visitor Days	85.0%	14,255,793	26,374,897	42,553,079
Arrivals	84.2%	1,451,670	2,673,818	4,403,876
Daily Census	86.0%	78,329	145,718	116,584
Airlift (scheduled seats)	60.0%	2,615,602	4,184,364	9,830,792

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

†June year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID-19.

Table 4: Key Performance Indicators - U.S. Total (YTD June 2021 vs. YTD June 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	-17.6%	5,846.0	4,819.5	7,833.4
Daily Spend (\$PPPD)	-2.7%	187.8	182.7	184.1
Visitor Days	-15.3%	31,133,890	26,374,897	42,553,079
Arrivals	-22.4%	3,444,673	2,673,818	4,403,876
Daily Census	-15.3%	172,010	145,718	116,584
Airlift (scheduled seats)	-12.4%	4,774,353	4,184,364	9,830,792

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

- The unemployment rate decreased to 5.7 percent in June.
- The Conference Board Consumer Confidence Index improved further in June, following gains in each of the previous four months. The Index now stands at 127.3 (1985=100), up from 120.0 (an upward revision) in May.

- Major U.S. wholesalers' focus continues to be on Hawai'i's safety and protocol guidelines and travel advisor educational messaging. Wholesale partners are seeing positive trends and increased demand in week-over-week bookings. All are seeing sustained strength and the largest total booking pace since pre-pandemic levels. Bookings have been stronger for autumn than Hawai'i typically sees and especially strong into the winter holidays and into next year.
- The forecast for domestic scheduled nonstop air seats to Hawai'i for July - September 2021 will increase by +28.1 percent as compared with the same time period in 2019. The projection is based on flights appearing in Diio Mi airline schedules. Due to COVID-19, the constant fluidity in scheduled air seats is expected to continue in all major market areas including U.S. West (+27.8%) and U.S. East (+30.5%). The situation is being monitored and the forecast adjusted accordingly.

US WEST

Table 5: Key Performance Indicators - U.S. West (YTD June 2021 vs. YTD June 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	3,187.7	4,850.7
Daily Spend (\$PPPD)	N/A	N/A [†]	178.8	173.0
Visitor Days	105.9%	8,656,296	17,827,133	28,031,536
Arrivals	101.1%	927,890	1,865,897	3,002,696
Daily Census	107.1%	47,562	98,492	76,799
Airlift (scheduled seats)	61.3%	2,276,449	3,672,379	8,530,031

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

[†]June year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID-19.

Table 6: Key Performance Indicators - U.S. West (YTD June 2021 vs. YTD June 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	-7.2%	3,436.7	3,187.7	4,850.7
Daily Spend (\$PPPD)	1.8%	175.6	178.8	173.0
Visitor Days	-8.9%	19,574,516	17,827,133	28,031,536
Arrivals	-17.4%	2,258,313	1,865,897	3,002,696
Daily Census	-8.9%	108,146	98,492	76,799
Airlift (scheduled seats)	-12.1%	4,177,896	3,672,379	8,530,031

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

- In June 2021, 521,796 visitors arrived from the U.S. West, well above the 10,149 visitors (+5,041.2%) in June 2020, and exceeding the June 2019 count of 452,958 visitors (+15.2%). U.S. West visitors spent \$916.4 million in June 2021 which surpassed the \$691.2 million (+32.6%) spent in June 2019. Higher average daily visitor spending (\$188 per person, +9.9%) and a longer average length of stay (9.34 days, +4.7%) also contributed to the growth in U.S. West visitor expenditures compared to 2019.
- Through the first half of 2021, there were 1,865,897 visitors from the U.S. West compared to 927,890 visitors (+101.1%) in the first half of 2020, versus 2,258,313 visitors (-17.4%) in the first half of 2019. For the first half of 2021, total visitor spending was \$3.19 billion, down 7.2 percent from \$3.44 billion in the first half of 2019.
- California did not have quarantine requirements for travelers in June 2021. In Oregon, travel restrictions were also lifted. In Washington, returning residents were advised to follow travel recommendations from the CDC.

US EAST

Table 7: Key Performance Indicators - U.S. East (YTD June 2021 vs. YTD June 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	1,631.7	2,982.6
Daily Spend (\$PPPD)	N/A	N/A [†]	190.9	205.4
Visitor Days	52.7%	5,599,497	8,547,763	14,521,543
Arrivals	54.2%	523,780	807,922	1,401,180
Daily Census	53.5%	30,766	47,225	39,785
Airlift (scheduled seats)	51.0%	339,153	511,985	1,300,761

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

[†]June year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID-19.

Table 8: Key Performance Indicators - U.S. East (YTD June 2021 vs. YTD June 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	-32.3%	2,409.3	1,631.7	2,982.6
Daily Spend (\$PPPD)	-8.4%	208.4	190.9	205.4
Visitor Days	-26.1%	11,559,374	8,547,763	14,521,543
Arrivals	-31.9%	1,186,360	807,922	1,401,180
Daily Census	-26.1%	63,864	47,225	39,785
Airlift (scheduled seats)	-14.2%	596,457	511,985	1,300,761

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

- There were 247,382 visitors from the U.S. East in June 2021, compared to 5,596 visitors (+4,320.8%) in June 2020, and surpassing the 240,223 visitors (+3.0%) in June 2019. U.S. East visitors spent \$513.3 million in June 2021 compared to \$491.1 million (+4.5%) in June 2019. A longer length of stay (10.28 days, +5.6%) also contributed to the increase in U.S. East visitor expenditures. Daily spending (\$202 per person) was lower compared to June 2019 (\$210 per person).
- Through the first half of 2021, there were 807,922 visitors from the U.S. East compared to 523,780 visitors (+54.2%) in the first half of 2020, versus 1,186,360 visitors (-31.9%) in the first half of 2019. For the first half of 2021, total visitor spending was \$1.63 billion, a decrease of 32.3 percent from \$2.41 billion in the first half of 2019.
- In New York, travelers were not required to submit traveler health forms but were advised to follow CDC travel recommendations.

CANADA

Table 9: Key Performance Indicators – Canada (YTD June 2021 vs. YTD June 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	17.2 ^{3/}	449.3
Daily Spend (\$PPPD)	N/A	N/A [†]	119.2 ^{3/}	168.6
Visitor Days	-93.0%	2,057,170	144,383	2,664,375
Arrivals	-96.5%	155,821	5,434	195,431
Daily Census	-92.9%	11,303	798	7,300
Airlift (scheduled seats)	-86.6%	164,881	22,160	245,510

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

[†]June year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID-19.

^{3/}Year-to-date 2021 visitor spending statistics were only for January and February. March - June 2021 spending data were not available due to limited samples.

Table 10: Key Performance Indicators – Canada (YTD June 2021 vs. YTD June 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	642.8	17.2 ^{3/}	449.3
Daily Spend (\$PPPD)	N/A	166.0	119.2 ^{3/}	168.6
Visitor Days	-96.3%	3,871,900	144,383	2,664,375
Arrivals	-98.3%	315,535	5,434	195,431
Daily Census	-96.3%	21,392	798	7,300
Airlift (scheduled seats)	-92.8%	306,686	22,160	245,510

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diiio Mi flight schedules as of May 26, 2021, subject to change.

^{3/}Year-to-date 2021 visitor spending statistics were only for January and February. March – June 2021 spending data were not available due to limited samples.

- Only 627 visitors arrived from Canada in June 2021, compared to 57 visitors (+1,000.2%) in June 2020, versus 19,172 visitors (-96.7%) in June 2019.
- Through the first half of 2021, there were 5,434 visitors from Canada compared to 155,821 visitors (-96.5%) in the first half of 2020, versus 315,535 visitors (-98.3%) in the first half of 2019.
- Travelers to Canada, including returning Canadian nationals, were required to take a COVID-19 molecular test upon arrival, and another test toward the end of their mandatory 14-day quarantine. Prior to departure to Canada, most travelers were required to reserve a three-night stay in a government-authorized hotel. In addition, they were required to submit their travel and contact information, including a suitable quarantine plan, electronically via ArriveCAN before boarding their flight.
- Canada's economy is projected to expand by 6.7 percent this year and 4.4 percent in 2022. This represents an upgrade from the spring update and partly reflects the generally successful rollout of vaccines that has led to a gradual reopening of the economy and a boost in confidence.
- The loonie continued to gain strength during the first six months of 2021, reaching an average of US\$0.80, a 9.1 per cent increase over 2020.

JAPAN

Table 11: Key Performance Indicators – Japan (YTD June 2021 vs. YTD June 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	27.7	454.4
Daily Spend (\$PPPD)	N/A	N/A [†]	215.8	227.4
Visitor Days	-92.6%	1,732,604	128,471	1,998,302
Arrivals	-97.5%	294,295	7,448	347,802
Daily Census	-92.5%	9,520	710	5,475
Airlift (scheduled seats)	-88.2%	466,072	55,071	1,187,421

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diiio Mi flight schedules as of May 26, 2021, subject to change.

[†]June year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID-19.

Table 12: Key Performance Indicators – Japan (YTD June 2021 vs. YTD June 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	-97.3%	1,032.5	27.7	454.4
Daily Spend (\$PPPD)	-10.4%	240.9	215.8	227.4
Visitor Days	-97.0%	4,286,038	128,471	1,998,302
Arrivals	-99.0%	734,235	7,448	347,802
Daily Census	-97.0%	23,680	710	5,475
Airlift (scheduled seats)	-94.4%	981,290	55,071	1,187,421

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

- There were 1,859 visitors from Japan in June 2021, compared to 40 visitors (+4,567.3%) in June 2020, versus 126,592 visitors (-98.5%) in June 2019. Visitors from Japan spent \$7.4 million in June 2021 compared to \$182.0 million (-96.0%) in June 2019.
- Through the first half of 2021, there were 7,448 visitors from Japan compared to 294,295 visitors (-97.5%) in the first half of 2020, versus 734,235 visitors (-99.0%) in the first half of 2019. For the first half of 2021, total visitor spending was \$27.7 million, a drop of 97.3 percent from \$1.03 billion in the first half of 2019.
- According to Nikkei NEEDs forecast, Japan's 2021 economy will recover slowly in later months of 2021 and real GDP is expected to grow at 5 percent and 2.6 percent in 2021 and 2022 respectively. Consumption rate is also expected to increase by 4 percent for 2021 and 1.9 percent for 2022.
- As of July 14, Japan's vaccination rate went up to close to 16 percent.
- Japan will start accepting vaccine passport applications from July 26 for people who have been fully vaccinated to travel internationally.
- Japan government announced the 4th state of emergency for Tokyo until August 22, 2021. This period will cover the duration of the Tokyo Olympics. The government targets to curb the movement of people during this global event as well as summer vacation period including Obon holidays.
- According to Japan National Tourism Organization (JNTO), Japanese outbound travel for the month of June was 30,600 passengers, 98 percent down compared to the same period in 2019. For the first half year 2021, 199,000 Japanese went overseas (-97.9% vs. 2019) and it is expected that there will be less than 1 million outbound travels based on the current pace.
- Japan's travel trade industry is aware of Hawai'i's vaccination progress and the ease of travel restrictions and are expecting Hawai'i to be one of the first outbound destinations for tourism recovery once Japan government loosens its travel restrictions.
- Airline Operation: July 2021: 37 flights with 9,286 seats. ZIPAIR will resume flights from 7/21. August 2021: 43 flights with 11,098 seats. ANA A380 Flying Honu will be back in August with two scheduled flights on August 9 & 13 from Narita to Honolulu.

OCEANIA

Table 13: Key Performance Indicators – Oceania (YTD June 2021 vs. YTD June 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	N/A ^{4/}	202.8
Daily Spend (\$PPPD)	N/A	N/A [†]	N/A ^{4/}	258.0
Visitor Days	-97.1%	568,180	16,353	786,033
Arrivals	-98.4%	60,816	969	82,654
Daily Census	-97.1%	3,122	90	2,154
Airlift (scheduled seats)	-100.0%	95,737	0	137,772

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

[†]June year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID-19.

^{4/}Year-to-date 2021 visitor spending data for January-June were not available due to limited samples.

Table 14: Key Performance Indicators – Oceania (YTD June 2021 vs. YTD June 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	408.9	N/A ^{4/}	202.8
Daily Spend (\$PPPD)	N/A	263.9	N/A ^{4/}	258.0
Visitor Days	-98.9%	1,549,481	16,353	786,033
Arrivals	-99.4%	165,878	969	82,654
Daily Census	-98.9%	8,561	90	2,154
Airlift (scheduled seats)	-100.0%	241,091	0	137,772

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

^{4/}Year-to-date 2021 visitor spending data for January-June were not available due to limited samples.

- There were 52 visitors from Australia in June 2021 who came on domestic flights. Direct flights from Australia continued to be suspended. In comparison there were 17 visitors in June 2020, versus 25,543 visitors in June 2019. The Australian government continued to impose a ban on all overseas travel for Australians unless an exemption was granted. Residents returning to Australia were required to undergo a mandatory 14-day quarantine.
- Through the first half of 2021, there were 266 visitors from Australia, compared to 50,089 visitors (-99.5%) in the first half of 2020, versus 132,710 visitors (-99.8%) in the first half of 2019.
- There were 226 visitors from New Zealand in June 2021 who arrived on domestic flights. Direct flights from New Zealand continued to be suspended. In comparison, there were 18 visitors in June 2020, versus 7,162 visitors in June 2019. The New Zealand government advised New Zealanders to refrain from travel overseas due to COVID-19 health risks and travel restrictions. Residents returning to New Zealand were required to complete at least 14 days of quarantine and test negative for COVID-19 before entering the community.
- Through the first half of 2021, there were 703 visitors from New Zealand, compared to 10,727 visitors (-93.4%) in the first half of 2020, versus 33,167 visitors (-97.9%) in the first half of 2019.
- In May, the Trans-Tasman quarantine-free travel bubble provided a much-needed boost for tourism in the region. Unfortunately, an outbreak featuring the Delta variant in June 2021 led to a lock-down situation in the state of New South Wales. While travel was subsequently restored between other Australian states and New Zealand, this was a setback to the recent successes.
- The recent outbreak has put a huge amount of pressure on the Australian government to increase the vaccination rate. Earlier supplies of the Pfizer vaccine have been urgently requested. The Australian Prime Minister announced a four-phase vaccination roadmap out

of coronavirus pandemic. While there was no specific timeline identified, it does provide a framework and a plan to return to international travel. It was announced that a home quarantine trial will begin in the next few months. Medical experts will also consider whether to shorten the quarantine period of vaccinated people.

- In New Zealand, the arrival of vaccinations is also increasing in July which will see 1 million vaccination shipments. The country is still on track to have the majority of the population vaccinated by the end of the year. This coincides with Air New Zealand announcing a plan to return airline schedules to selected cities in November – including Honolulu.
- The recent COVID-19 hiccup has seen a 2-cent reduction in value for both currencies against the US Dollar. The month ended at the following rate (AU\$1.00 = US\$0.75 and NZ\$1.00 = US\$0.70).

EUROPE

Table 15: Key Performance Indicators – Europe (YTD June 2021 vs. YTD June 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	N/A ^{5/}	106.4
Daily Spend (\$PPPD)	N/A	N/A [†]	N/A ^{5/}	146.7
Visitor Days	-78.9%	270,107	57,075	725,338
Arrivals	-81.2%	20,488	3,842	55,102
Daily Census	-78.8%	1,484	315	1,987
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

*DBEDT 2021 annual forecast (Quarter 1, 2021).

[†]June year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID-19.

^{5/}Year-to-date 2021 visitor spending data for January-June were not available due to limited samples.

Table 16: Key Performance Indicators – Europe (YTD June 2021 vs. YTD June 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	117.7	N/A ^{5/}	106.4
Daily Spend (\$PPPD)	N/A	165.9	N/A ^{5/}	146.7
Visitor Days	-92.0%	709,598	57,075	725,338
Arrivals	-93.0%	54,975	3,842	55,102
Daily Census	-92.0%	3,920	315	1,987
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

*DBEDT 2021 annual forecast (Quarter 1, 2021).

^{5/}Year-to-date 2021 visitor spending data for January-June were not available due to limited samples.

- In June 2021, there were 1,003 visitors from the United Kingdom, France, Germany, Italy and Switzerland. In comparison, 45 visitors came in June 2020, versus 8,940 visitors who came in June 2019. In Germany, returning German nationals, with proof of COVID-19 vaccination could bypass testing and quarantine, unless they returned from areas where COVID-19 variants were prevalent. Those who returned from high-risk countries must self-quarantine for 10 days. In the United Kingdom, fully vaccinated U.K. nationals who returned from a country not on the red travel list, did not have to self-quarantine but must provide proof of a negative COVID-19 test within 72 hours of departure, proof of vaccination status, and complete a UK passenger locator form. Those not fully vaccinated must self-isolate at home for 10 days and take COVID-19 tests on day 2 and day 8 of their quarantine at their own expense.

- Through the first half of 2021, there were 3,842 visitors from Europe, compared to 20,488 visitors (-81.2%) in the first half of 2020, versus 54,975 visitors (-93.0%) in the first half of 2019.

OTHER ASIA

Table 17: Key Performance Indicators – Other Asia (YTD June 2021 vs. YTD June 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	N/A ^{6/}	NA
Daily Spend (\$PPPD)	N/A	N/A [†]	N/A ^{6/}	NA
Visitor Days	-81.4%	490,582	91,320	NA
Arrivals	-90.6%	57,066	5,364	NA
Daily Census	-81.3%	2,696	505	NA
Airlift (scheduled seats)	-100.0%	86,695	0	127,746

*DBEDT 2021 annual forecast is not available. 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

[†]June year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID-19.

^{6/}Year-to-date 2021 visitor spending data for January-June were not available due to limited samples.

Table 18: Key Performance Indicators – Other Asia (YTD June 2021 vs. YTD June 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	426.9	N/A ^{6/}	NA
Daily Spend (\$PPPD)	N/A	297.5	N/A ^{6/}	NA
Visitor Days	-93.6%	1,434,769	91,320	NA
Arrivals	-97.1%	182,675	5,364	NA
Daily Census	-93.6%	7,927	505	NA
Airlift (scheduled seats)	-100.0%	243,011	0	127,746

*DBEDT 2021 annual forecast is not available. 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

^{6/}Year-to-date 2021 visitor spending data for January-June were not available due to limited samples.

- In June 2021, there were 1,737 visitors from Other Asia (China, Hong Kong, Korea, Singapore, Taiwan) compared to 61 visitors in June 2020, versus 28,722 in June 2019.
- Through the first half of 2021, there were 5,364 visitors from Other Asia, compared to 57,066 visitors in the first half of 2020, versus 182,675 visitors in the first half of 2019.

KOREA

Table 19: Key Performance Indicators – Korea (YTD June 2021 vs. YTD June 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	N/A ^{7/}	127.0
Daily Spend (\$PPPD)	N/A	N/A [†]	N/A ^{7/}	278.2
Visitor Days	-83.9%	349,018	56,161	456,698
Arrivals	-94.2%	41,672	2,429	55,102
Daily Census	-83.8%	1,918	310	1,251
Airlift (scheduled seats)	-85.2%	71,175	10,564	214,534

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

[†]June year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID-19.

^{7/}Year-to-date 2021 visitor spending data for January-June were not available due to limited samples.

Table 20: Key Performance Indicators – Korea (YTD June 2021 vs. YTD June 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	237.9	N/A ^{7/}	127.0
Daily Spend (\$PPPD)	N/A	279.9	N/A ^{7/}	278.2
Visitor Days	-93.4%	850,171	56,161	456,698
Arrivals	-97.8%	110,597	2,429	55,102
Daily Census	-93.4%	4,697	310	1,251
Airlift (scheduled seats)	-93.4%	159,338	10,564	214,534

*DBEDT 2021 annual forecast (Quarter 1, 2021). 2021 seats forecast by HTA, based on Diio Mi flight schedules as of May 26, 2021, subject to change.

^{7/}Year-to-date 2021 visitor spending data for January-June were not available due to limited samples.

- There were 722 visitors from Korea in June 2021. Of that number, 488 arrived on direct flights from Korea and 234 came on domestic flights. In comparison, there were 23 visitors in June 2020, versus 16,535 visitors in June 2019. Returning Korean nationals in June 2021 who completed full vaccination and tested negative for COVID-19 (within 72 hours prior to entering Korea; and on the 6th or 7th day after entering Korea) were exempted from the mandatory 14-day quarantine.
- Through the first half of 2021, there were 2,429 visitors from Korea, compared to 41,672 visitors (-94.2%) in the first half of 2020, versus 110,597 visitors (-97.8%) in the first half of 2019.
- The Korean government plans to introduce more relaxed guidelines from July 2021 to stimulate the economy as the vaccination rate increases. According to the eased measures, face masks will become optional outdoors from July for the vaccinated, and larger groups in public spaces.
- In order to prevent the spread of variant virus, the greater Seoul area has been placed under the strictest Level 4 guidelines until July 25 under which gatherings of more than two people are banned after 6 p.m.
- According to the Organization for Economic Cooperation and Development (OECD), the South Korean economy is forecasted to grow 3.8 percent this year due to the strong export growth and expansionary macroeconomic policy, ramping up its previous projection of 3.3 percent.
- Consumer sentiment of Korea rose to the highest level in almost three years in May 2021 as the country's economy is on a recovery path and vaccination is going well. The composite consumer sentiment index came in at 105.2 for May 2021, up 3 points from the previous month and the highest level since June 2018.
- The average USD/WON exchange rate in June was 1,122.43 won, slightly appreciated from the previous rate of 1,123.37 won in May.
- Korean Air and Asiana Airlines will operate 2 charter flights each from Incheon to Honolulu during Chuseok, Lunar Thanksgiving, in September 2021.
- Hawaiian Airlines currently operates two weekly flights from ICN to HNL on every Friday and Sunday and plans to increase to 3 times a week starting August 1.

LATIN AMERICA

Table 21: Key Performance Indicators – Latin America (YTD June 2021 vs. YTD June 2020)

	YOY Rate	2020 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	N/A [†]	N/A ^{8/}	NA
Daily Spend (\$PPPD)	N/A	N/A [†]	N/A ^{8/}	NA
Visitor Days	-33.8%	54,868	36,342	NA
Arrivals	-46.2%	5,115	2,753	NA
Daily Census	-33.4%	301	201	NA
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

*DBEDT 2021 annual forecast is not available.

[†]June year-to-date 2020 visitor spending statistics were not available, as there was no fielding between April through October 2020 due to COVID-19.

^{8/}Year-to-date 2021 visitor spending data for January-June were not available due to limited samples.

Table 22: Key Performance Indicators – Latin America (YTD June 2021 vs. YTD June 2019)

	YOY Rate	2019 YTD	2021 YTD	2021 Annual Forecast*
Visitor Spending (\$mil)	N/A	31.0	N/A ^{8/}	NA
Daily Spend (\$PPPD)	N/A	230.0	N/A ^{8/}	NA
Visitor Days	-73.1%	135,015	36,342	NA
Arrivals	-78.5%	12,777	2,753	NA
Daily Census	-73.1%	746	201	NA
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

*DBEDT 2021 annual forecast is not available.

^{8/}Year-to-date 2021 visitor spending data for January-June were not available due to limited samples.

- There were 791 visitors from Mexico, Brazil and Argentina in June 2021, compared to 41 visitors in June 2020, versus 1,471 visitors in June 2019. In Argentina, all ports of entry remained closed to most non-resident foreign nationals. Legal residents authorized to travel were required to complete a health affidavit up to 48 hours before returning to Argentina, provide a negative COVID-19 result from a test taken within 72 hours before travel, and self-quarantine for 10 days. In Mexico, the land border between the U.S. and Mexico continued to be closed until at least July 21, 2021 to non-essential crossings, but not commerce. Returning Mexican nationals who traveled by air were subject to temperature checks and health screening. Those exhibiting symptoms may be subject to additional health screening and/or quarantine.
- Through the first half of 2021, there were 2,753 visitors from Latin America, compared to 5,115 visitors (-46.2%) in the first half of 2020, versus 12,777 visitors (-78.5%) in the first half of 2019.

ISLAND VISITATION:

- **Oahu:** There were 394,726 visitors to O'ahu in June 2021, compared to 12,395 visitors in June 2020, versus 562,749 visitors in June 2019. Visitor spending was \$541.5 million⁹, down 26.6 percent from \$738.1 million in June 2019.

Through the first half of 2021, there were 1,319,874 visitors to O'ahu compared to 1,245,145 visitors (+6.0%) in the first half of 2020, versus 3,025,236 visitors (-56.4%) in the first half of

⁹ For June 2021, visitor spending statistics by island were from U.S. West, U.S. East and Japan only. Spending data for visitors from the other markets were not available due to limited samples.

2019. For the first half of 2021, total visitor spending of \$1.78 billion¹⁰ was a 55.7 percent decrease from \$4.02 billion in the first half of 2019.

- **Maui** There were 260,618 visitors to Maui in June 2021, compared to 1,929 visitors in June 2020, versus 295,926 visitors in June 2019. While there were fewer visitors in June 2021 compared to June 2019, a longer length stay (8.60 days, +11.6%) contributed to higher visitor spending in June 2021 (\$503.0⁹ million, +5.4%), compared to June 2019 (\$477.1 million).

Through the first half of 2021, there were 984,154 visitors to Maui compared to 606,817 visitors (+62.2%) in the first half of 2020, versus 1,522,534 visitors (-35.4%) in the first half of 2019. For the first half of 2021, total visitor spending was \$1.90 billion¹⁰, down 27.2 percent from \$2.61 billion in the first half of 2019.

- **Hawai'i Island:** There were 136,781 visitors to Hawai'i Island in June 2021, compared to 2,617 visitors in June 2020, versus 163,564 visitors in June 2019. Although there were fewer visitors in June 2021 compared to June 2019, a longer length stay (9.11 days, +29.6%) contributed to increased visitor spending in June 2021 (\$220.2⁹ million, +7.0%), compared to June 2019 (\$205.8 million).

Through the first half of 2021, there were 485,861 visitors to Hawai'i Island compared to 394,717 visitors (+23.1%) in year-to-date 2020, versus 880,361 visitors (-44.8%) in the first half of 2019. For the first half of 2021, total visitor spending was \$778.4 million¹⁰, down 32.6 percent from \$1.16 billion in the first half of 2019.

- **Kaua'i:** There were 104,329 visitors to Kaua'i in June 2021, compared to 1,053 visitors in June 2020, versus 134,790 visitors in June 2019. Visitor spending was \$172.3 million⁹, a 12.1 percent decline from \$196.1 million in June 2019.

Through the first half of 2021, there were 245,722 visitors to Kaua'i compared to 283,612 visitors (-13.4%) in the first half of 2020, versus 686,539 visitors (-64.2%) in the first half of 2019. For the first half of 2021, total visitor spending was \$405.4 million, a decrease of 57.9 percent from \$963.6 million in the first half of 2019.

¹⁰ Year-to-date June 2021 visitor spending statistics by island were from U.S. West, U.S. East, Japan, and Canada (Canada data were only available for January and February). Spending data for visitors from the other markets were not available due to limited samples.

Note: Year-to-date June 2020 visitor spending by island were not available, as there was no fielding between April through October 2020 due to COVID-19 restrictions.

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **OVERALL**

Key Performance Indicators

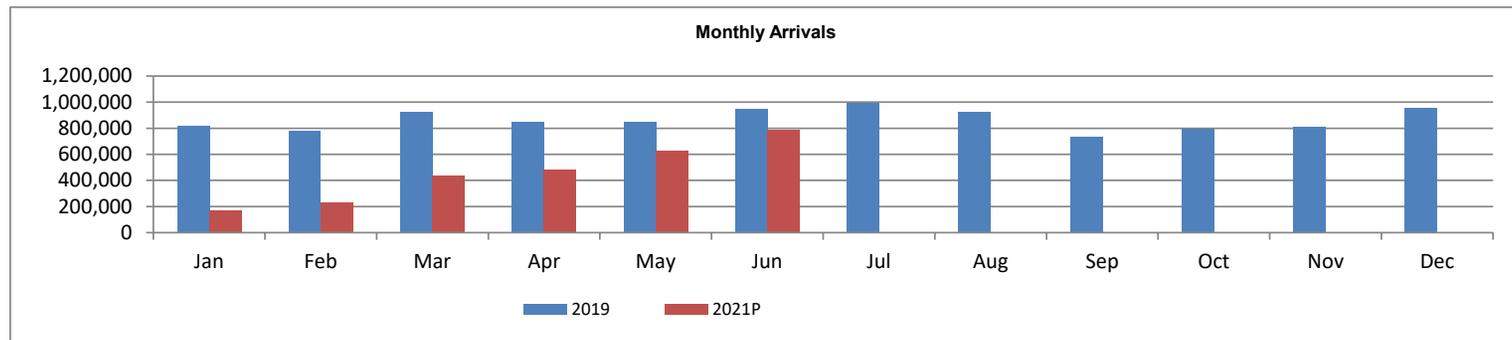
	YOY Rate	Jun'19 YTD	Jun'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{1/}	-45.1%	8,857.8	4,864.4	9,711.8
Daily Spend (\$PPPD) ^{1/}	-9.4%	195.8	177.3	185.4
Visitor Days	-39.4%	45,242,600	27,431,121	52,372,004
Arrivals	-46.8%	5,171,182	2,751,849	5,510,247
Daily Census	-39.4%	249,959	151,553	143,485
Airlift (scheduled seats)	-35.5%	6,702,620	4,322,816	11,882,593

	YOY Rate	YTD
O'ahu	-56.4%	1,319,874
Maui	-35.4%	984,154
Moloka'i	-67.0%	10,295
Lāna'i	-58.1%	17,843
Kaua'i	-64.2%	245,722
Hawai'i Island	-44.8%	485,861

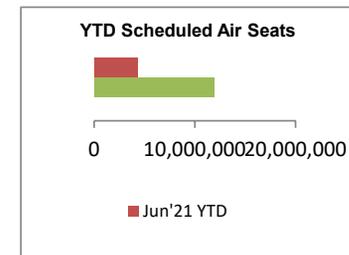
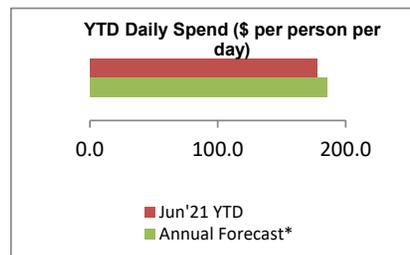
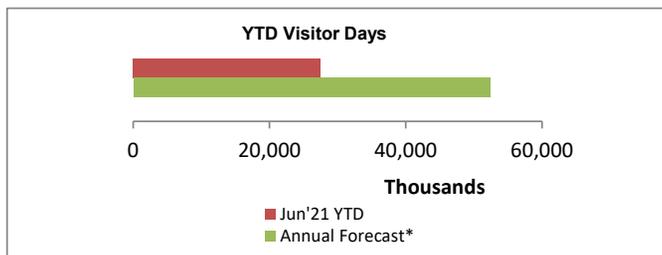
^{1/} DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on DiJo Mi flight schedules as of March 16, 2021, subject to change.

June YTD 2021 visitor spending statistics were from U.S. West, U.S. East, and Japan. Spending data from Canada were from January through February only; and data from all other markets were not available due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

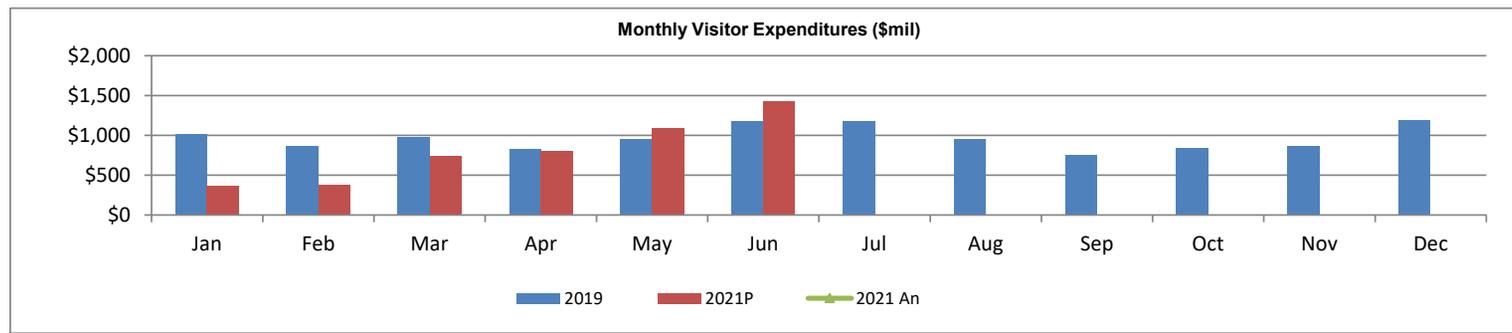
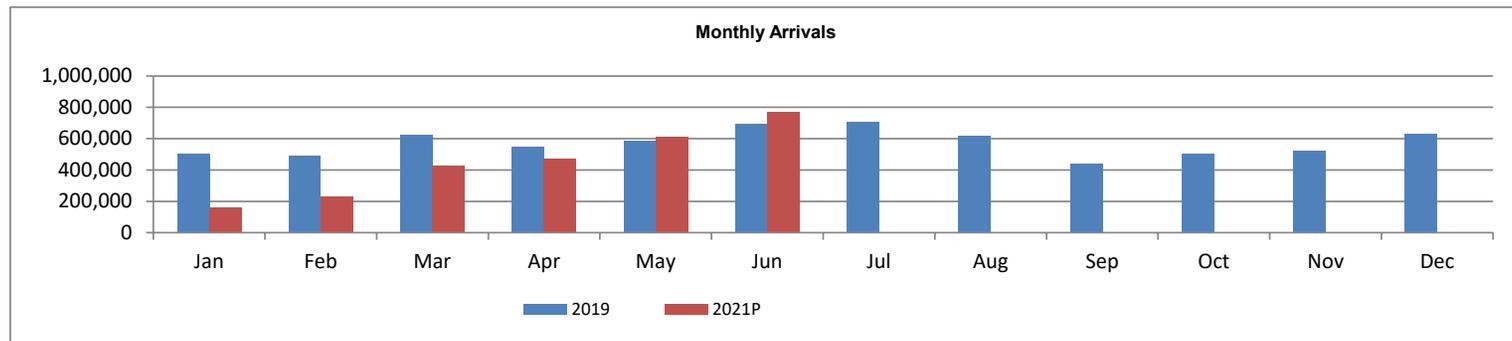
Market: **U.S. TOTAL**

Key Performance Indicators

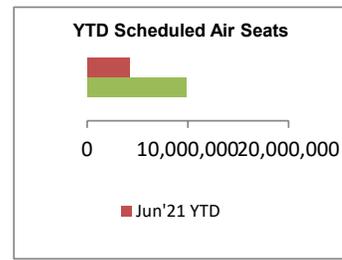
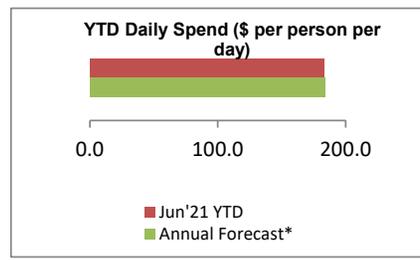
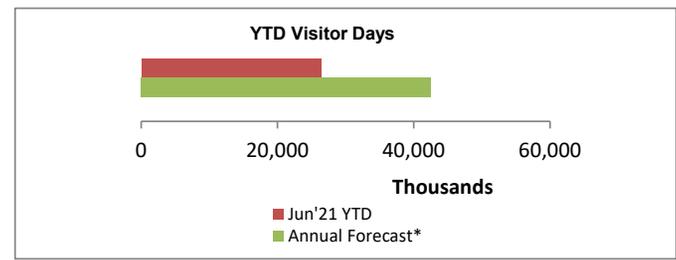
	YOY Rate	Jun'19 YTD	Jun'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ²⁾	-17.6%	5,846.0	4,819.5	7,833.4	O'ahu	-23.7%	1,270,987
Daily Spend (\$PPPD) ²⁾	-2.7%	187.8	182.7	184.1	Maui	-20.1%	962,839
Visitor Days	-15.3%	31,133,890	26,374,897	42,553,079	Moloka'i	-55.7%	9,940
Arrivals	-22.4%	3,444,673	2,673,818	4,403,876	Lāna'i	-41.5%	17,297
Daily Census	-15.3%	172,010	145,718	116,584	Kaua'i	-58.0%	240,166
Airlift (scheduled seats)	-12.4%	4,774,353	4,184,364	9,830,792	Hawai'i Island	-25.1%	474,631

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Dilo Mi flight schedules as of March 16, 2021, subject to change.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **U.S. WEST**

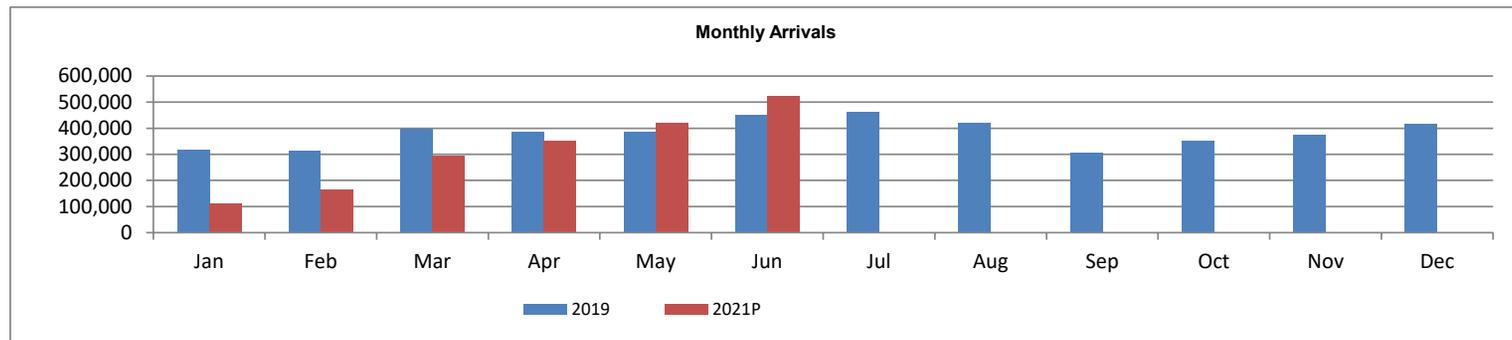
Key Performance Indicators

	YOY Rate	Jun'19 YTD	Jun'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{3/}	-7.2%	3,436.7	3,187.7	4,850.7
Daily Spend (\$PPPD) ^{3/}	1.8%	175.6	178.8	173.0
Visitor Days	-8.9%	19,574,516	17,827,133	28,031,536
Arrivals	-17.4%	2,258,313	1,865,897	3,002,696
Daily Census	-8.9%	108,146	98,492	76,799
Airlift (scheduled seats)	-12.1%	4,177,896	3,672,379	8,530,031

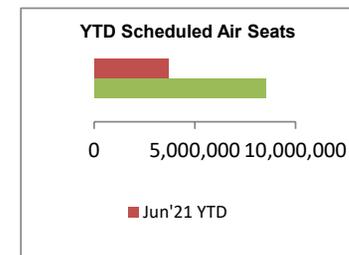
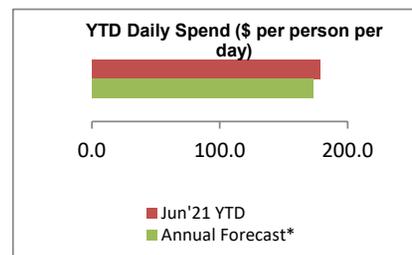
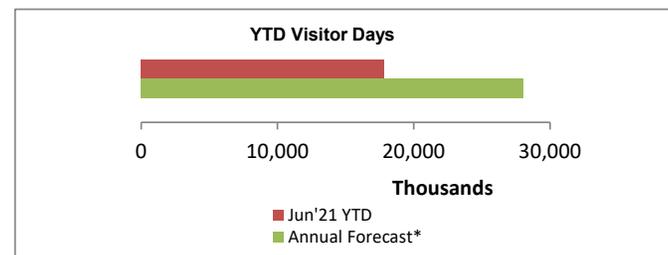
	YOY Rate	YTD
O'ahu	-17.5%	811,797
Maui	-11.2%	688,201
Moloka'i	-50.2%	6,570
Lāna'i	-31.1%	10,497
Kaua'i	-53.7%	166,107
Hawai'i Island	-16.8%	329,301

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Dilo Mi flight schedules as of March 16, 2021, subject to change.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **U.S. EAST**

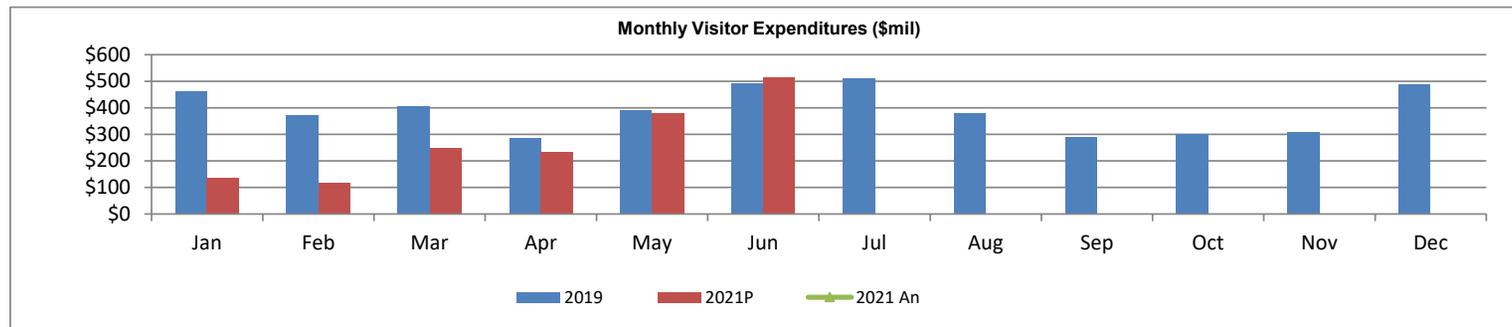
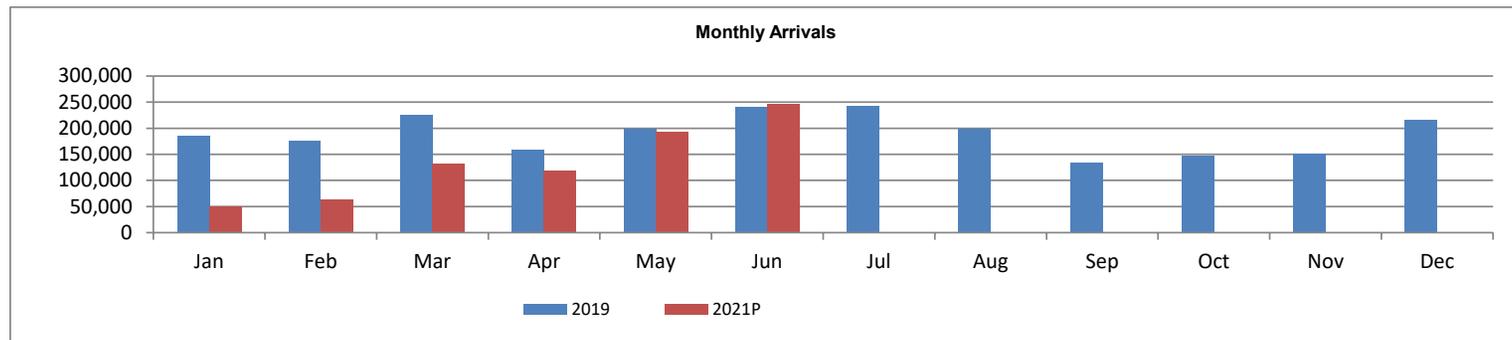
Key Performance Indicators

	YOY Rate	Jun'19 YTD	Jun'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{4/}	-32.3%	2,409.3	1,631.7	2,982.6
Daily Spend (\$PPPD) ^{4/}	-8.4%	208.4	190.9	205.4
Visitor Days	-26.1%	11,559,374	8,547,763	14,521,543
Arrivals	-31.9%	1,186,360	807,922	1,401,180
Daily Census	-26.1%	63,864	47,225	39,785
Airlift (scheduled seats)	-14.2%	596,457	511,985	1,300,761

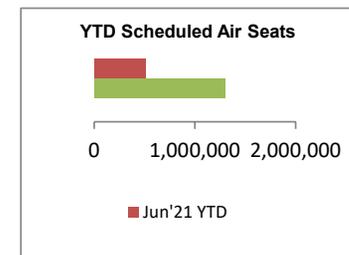
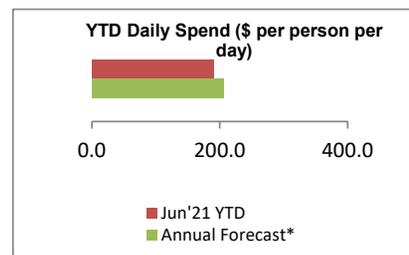
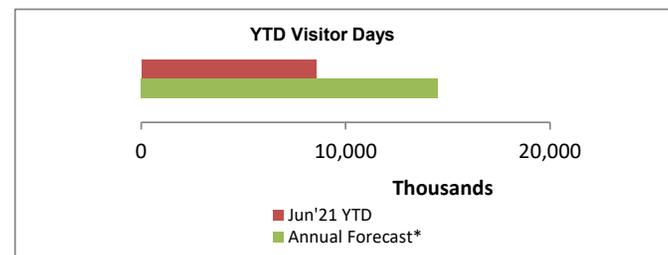
	YOY Rate	YTD
O'ahu	-32.6%	459,189
Maui	-36.2%	274,638
Moloka'i	-63.6%	3,371
Lāna'i	-52.7%	6,800
Kaua'i	-65.2%	74,059
Hawai'i Island	-39.0%	145,329

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

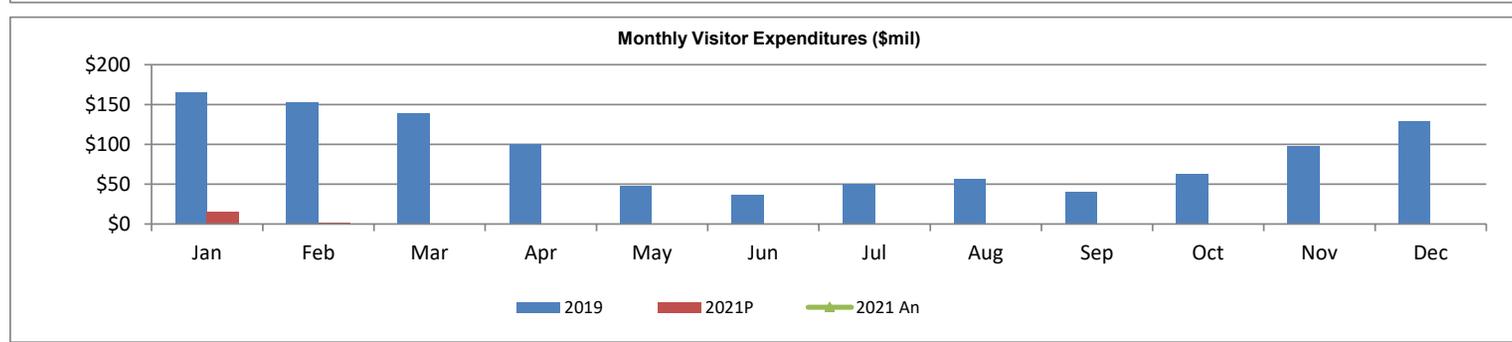
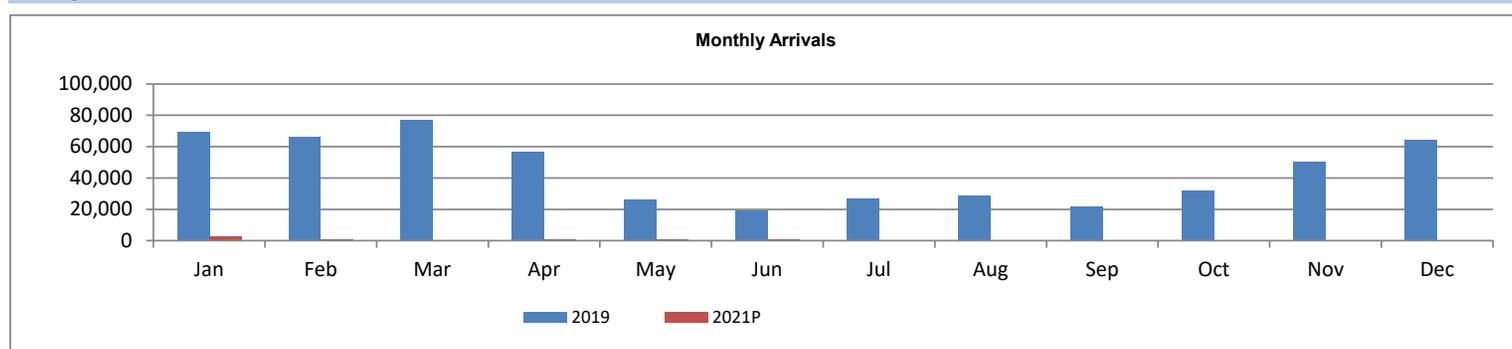
Visitor Industry Performance Measures

Market: **CANADA**

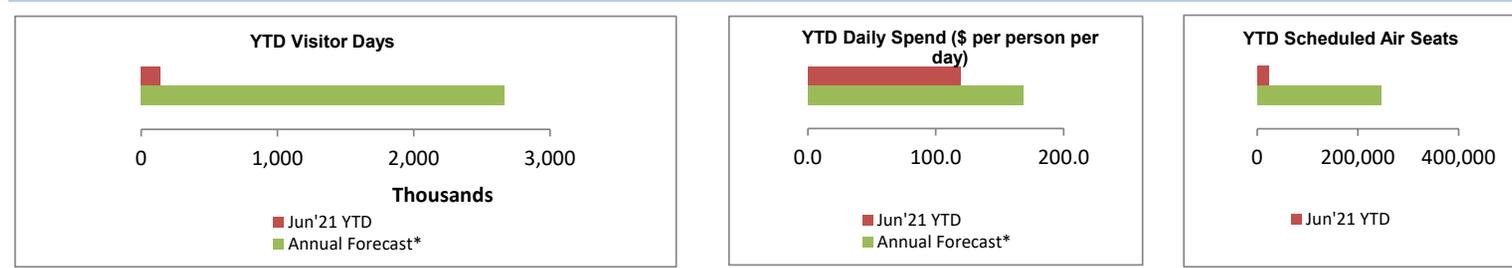
Key Performance Indicators					Key Performance Indicators		
	YOY Rate	Jun'19 YTD	Jun'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{5f}	N/A	642.8	17.2	449.3	O'ahu	-98.6%	1,886
Daily Spend (\$PPPD) ^{5f}	N/A	166.0	119.2	168.6	Maui	-98.2%	2,777
Visitor Days	-96.3%	3,871,900	144,383	2,664,375	Moloka'i	-99.1%	26
Arrivals	-98.3%	315,535	5,434	195,431	Lāna'i	-98.4%	52
Daily Census	-96.3%	21,392	798	7,300	Kaua'i	-99.5%	228
Airlift (scheduled seats)	-92.8%	306,686	22,160	245,510	Hawai'i Island	-98.2%	999

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diiō Mi flight schedules as of March 16, 2021, subject to change.
June YTD 2021 visitor spending statistics were from January through February only. Spending data from March through June were not available due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

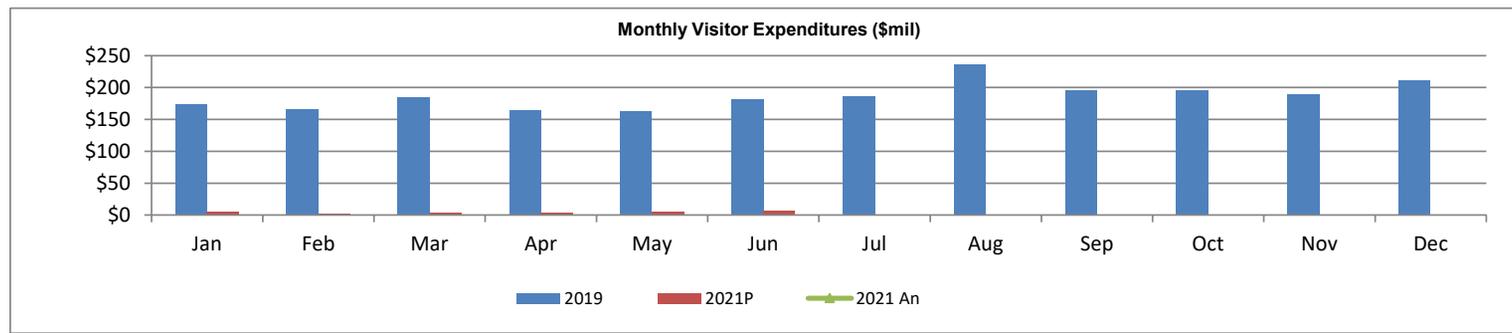
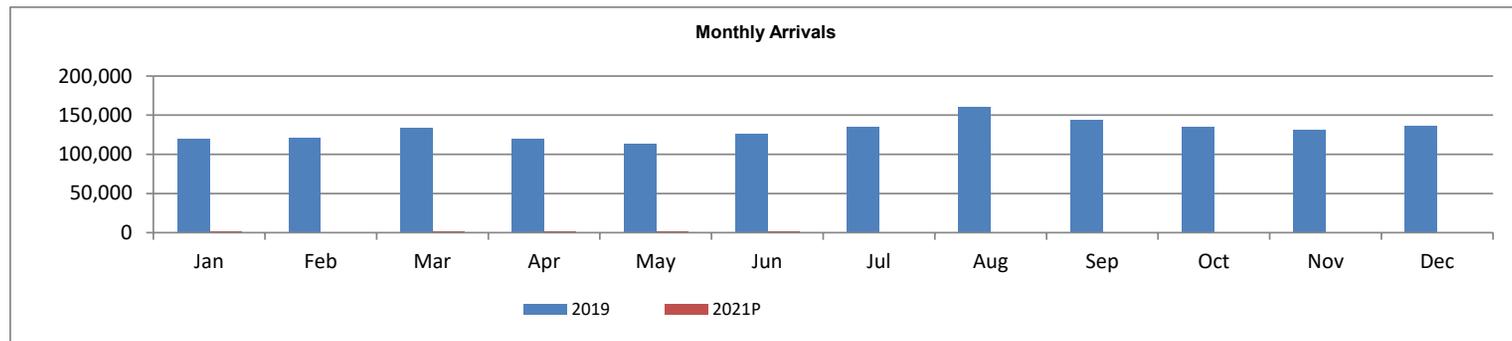
Visitor Industry Performance Measures

Market: **JAPAN**

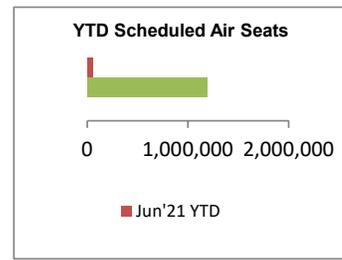
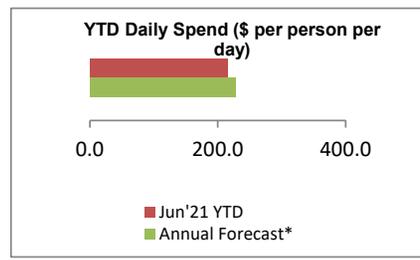
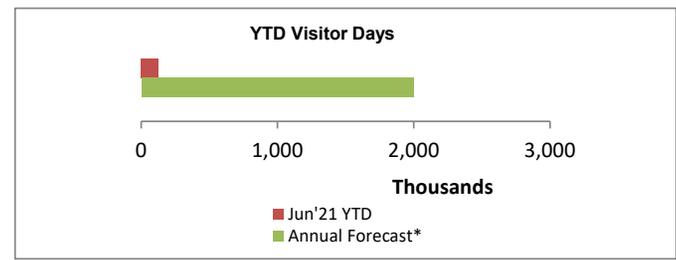
Key Performance Indicators					Key Performance Indicators		
	YOY Rate	Jun'19 YTD	Jun'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{6/}	-97.3%	1,032.5	27.7	454.4	O'ahu	-99.0%	7,177
Daily Spend (\$PPPD) ^{6/}	-10.4%	240.9	215.8	227.4	Maui	-99.3%	175
Visitor Days	-97.0%	4,286,038	128,471	1,998,302	Moloka'i	-99.2%	7
Arrivals	-99.0%	734,235	7,448	347,802	Lāna'i	-99.3%	8
Daily Census	-97.0%	23,680	710	5,475	Kaua'i	-99.4%	69
Airlift (scheduled seats)	-94.4%	981,290	55,071	1,187,421	Hawai'i Island	-99.7%	248

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diiro Mi flight schedules as of March 16, 2021, subject to change.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

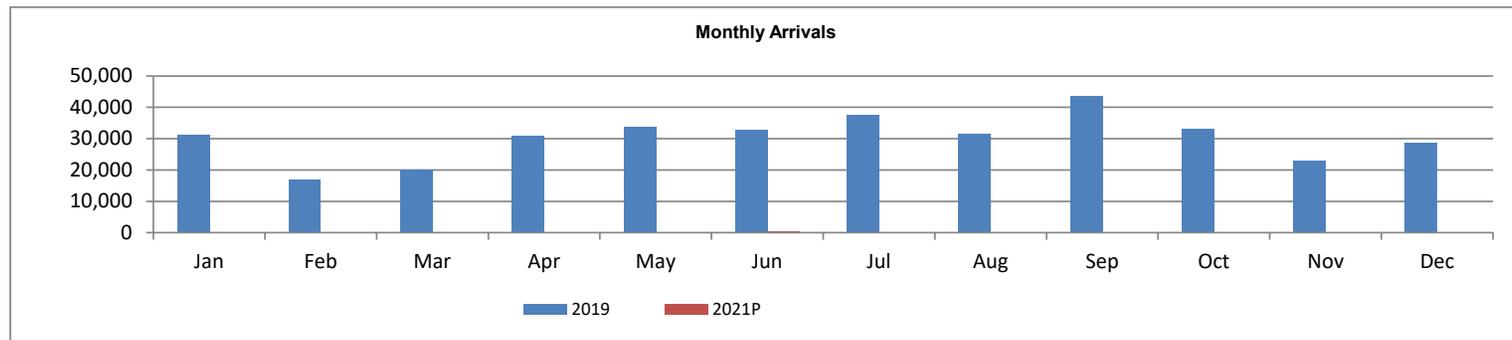
Visitor Industry Performance Measures

Market: **OCEANIA**

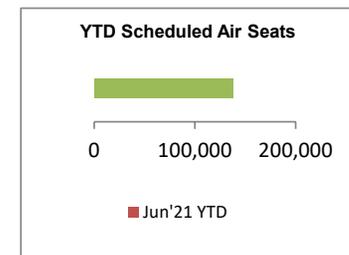
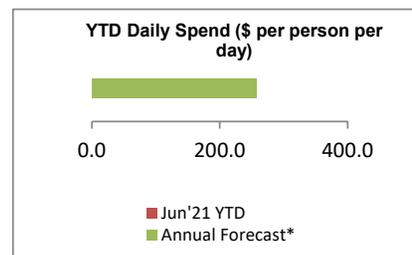
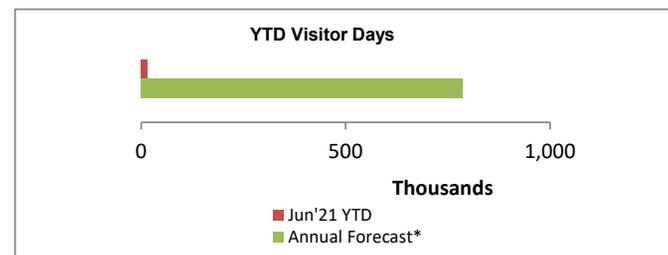
Key Performance Indicators					Key Performance Indicators		
	YOY Rate	Jun'19 YTD	Jun'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{7/}	N/A	408.9	N/A	202.8	O'ahu	-99.7%	551
Daily Spend (\$PPPD) ^{7/}	N/A	263.9	N/A	258.0	Maui	-99.0%	266
Visitor Days	-98.9%	1,549,481	16,353	786,033	Moloka'i	-99.5%	12
Arrivals	-99.4%	165,878	969	82,654	Lāna'i	-99.5%	16
Daily Census	-98.9%	8,561	90	2,154	Kaua'i	-99.0%	145
Airlift (scheduled seats)	-100.0%	241,091	0	137,772	Hawai'i Island	-99.0%	196

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Dijo Mi flight schedules as of March 16, 2021, subject to change.
 June YTD 2021 visitor spending statistics were not available from January through June due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

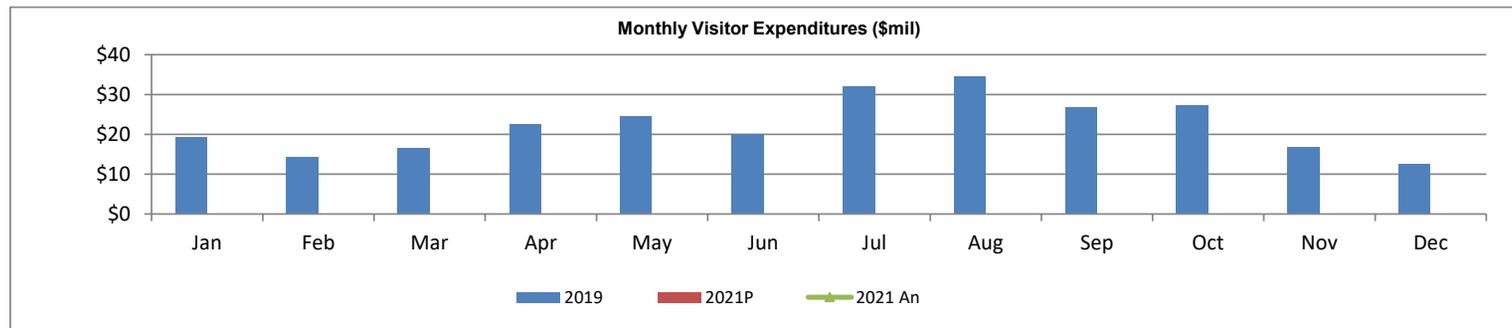
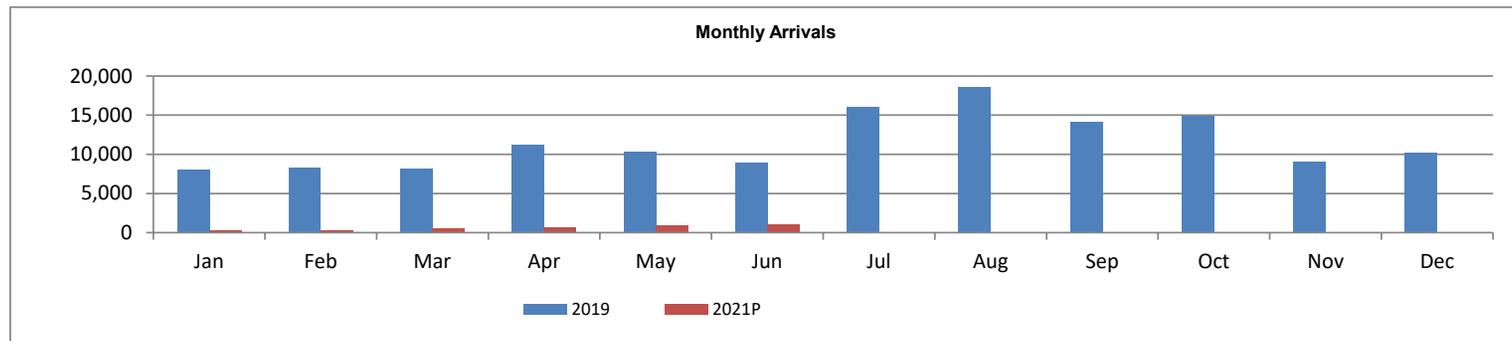
Market: **EUROPE**

Key Performance Indicators

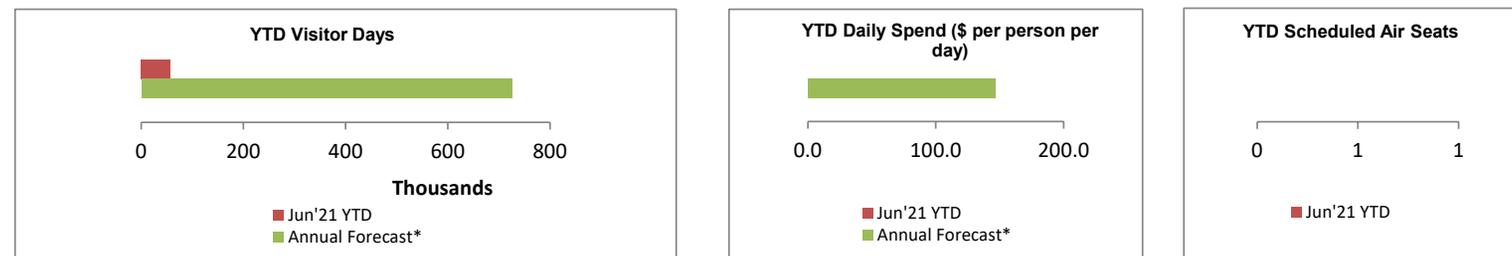
	YOY Rate	Jun'19 YTD	Jun'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{8/}	N/A	117.7	N/A	106.4	O'ahu	-94.8%	2,132
Daily Spend (\$PPPD) ^{8/}	N/A	165.9	N/A	146.7	Maui	-94.9%	1,205
Visitor Days	-92.0%	709,598	57,075	725,338	Moloka'i	-95.8%	32
Arrivals	-93.0%	54,975	3,842	55,102	Lāna'i	-95.0%	40
Daily Census	-92.0%	3,920	315	1,987	Kaua'i	-96.5%	457
Airlift (scheduled seats)	N/A	N/A	N/A	N/A	Hawai'i Island	-95.0%	816

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Dijo Mi flight schedules as of March 16, 2021, subject to change.
June YTD 2021 visitor spending statistics were not available from January through June due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **OTHER ASIA**

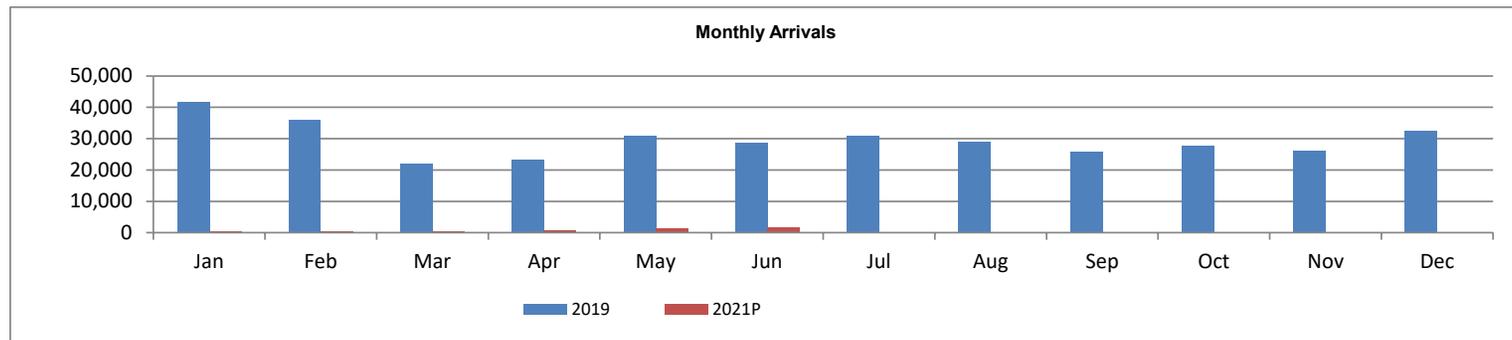
Key Performance Indicators

	YOY Rate	Jun'19 YTD	Jun'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{9/}	N/A	426.9	N/A	NA
Daily Spend (\$PPPD) ^{9/}	N/A	297.5	N/A	NA
Visitor Days	-93.6%	1,434,769	91,320	NA
Arrivals	-97.1%	182,675	5,364	NA
Daily Census	-93.6%	7,927	505	NA
Airlift (scheduled seats)	-100.0%	243,011	0	245,134

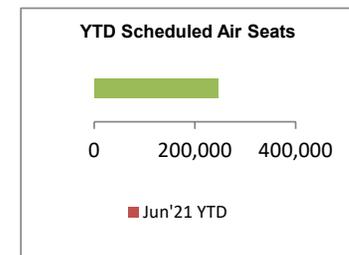
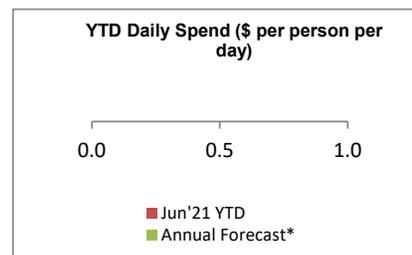
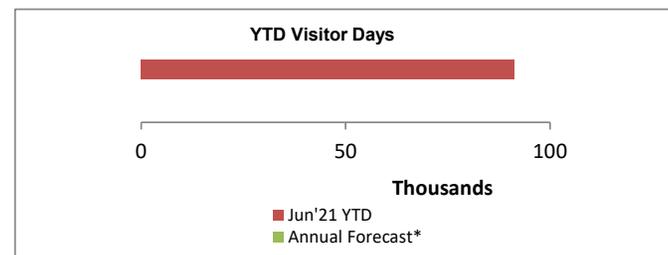
	YOY Rate	YTD
O'ahu	-97.6%	4,308
Maui	-96.9%	928
Moloka'i	-97.0%	25
Lāna'i	-95.8%	45
Kaua'i	-94.6%	382
Hawai'i Island	-97.3%	996

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of March 16, 2021, subject to change.
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Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

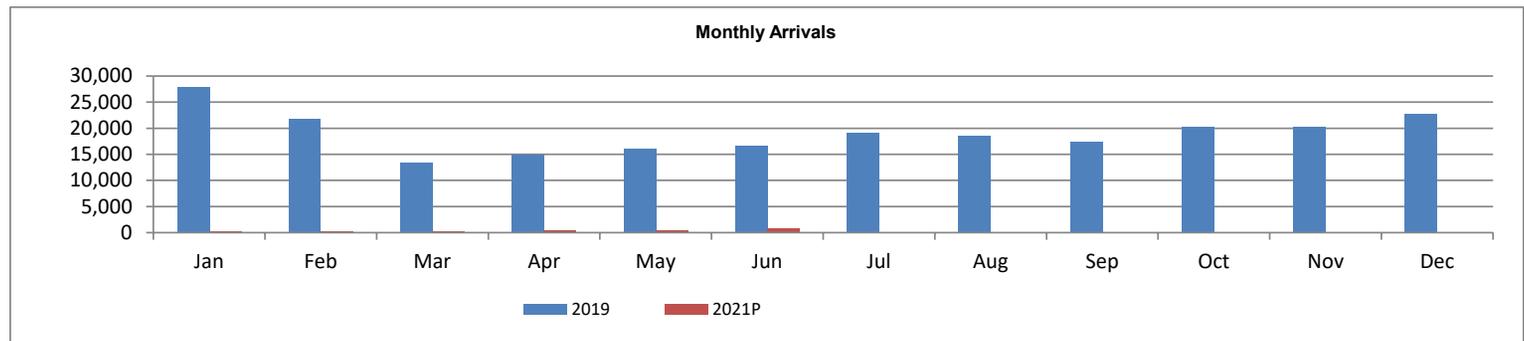
Visitor Industry Performance Measures

Market: **KOREA**

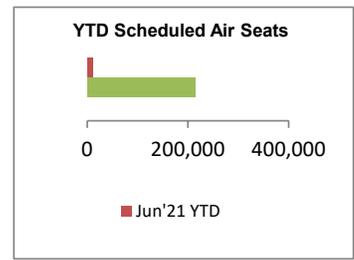
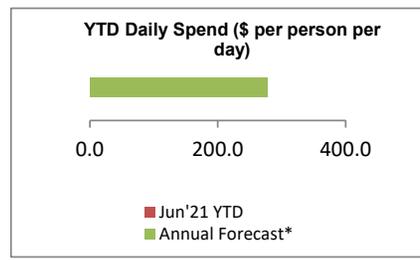
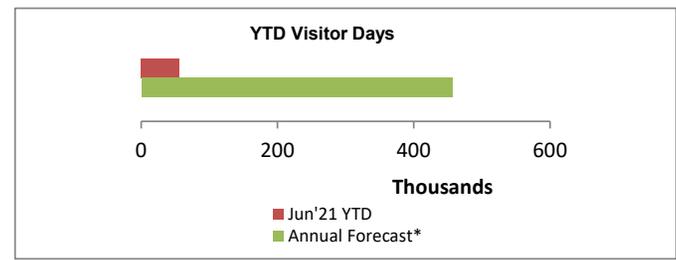
Key Performance Indicators					Key Performance Indicators		
	YOY Rate	Jun'19 YTD	Jun'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{10/}	N/A	237.9	N/A	127.0	O'ahu	-98.1%	2,113
Daily Spend (\$PPPD) ^{10/}	N/A	279.9	N/A	278.2	Maui	-98.4%	243
Visitor Days	-93.4%	850,171	56,161	456,698	Moloka'i	-99.4%	2
Arrivals	-97.8%	110,597	2,429	55,102	Lāna'i	-97.6%	8
Daily Census	-93.4%	4,697	310	1,251	Kaua'i	-97.6%	93
Airlift (scheduled seats)	-93.4%	159,338	10,564	214,534	Hawai'i Island	-98.0%	275

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Dijo Mi flight schedules as of March 16, 2021, subject to change.
 June YTD 2021 visitor spending statistics were not available from January through June due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **LATIN AMERICA**

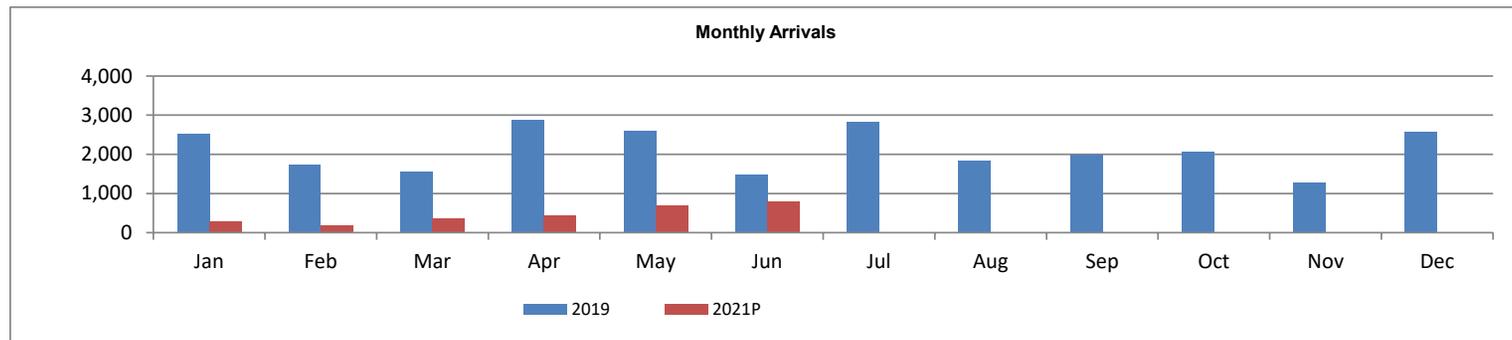
Key Performance Indicators

	YOY Rate	Jun'19 YTD	Jun'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{11/}	N/A	31.0	N/A	NA
Daily Spend (\$PPPD) ^{11/}	N/A	230.0	N/A	NA
Visitor Days	-73.1%	135,015	36,342	NA
Arrivals	-78.5%	12,777	2,753	NA
Daily Census	-73.1%	746	201	NA
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

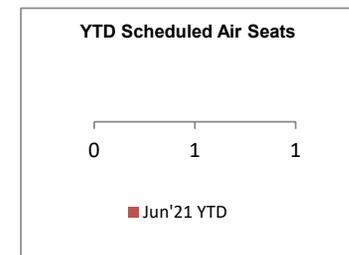
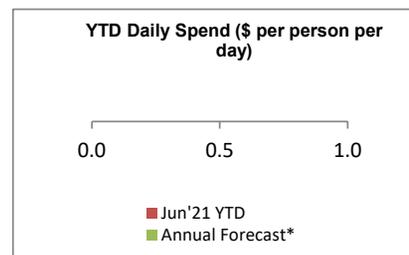
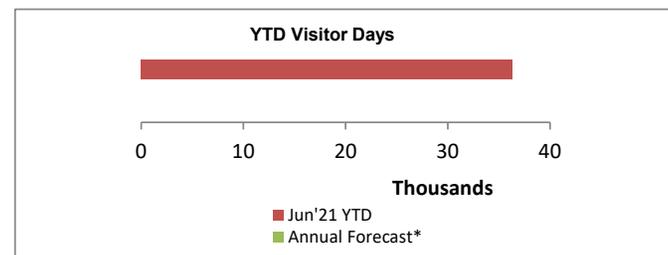
	YOY Rate	YTD
O'ahu	-82.5%	1,735
Maui	-76.0%	1,036
Moloka'i	-87.1%	13
Lāna'i	-85.5%	38
Kaua'i	-88.5%	186
Hawai'i Island	-76.7%	542

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diiō Mi flight schedules as of March 16, 2021, subject to change.
 June YTD 2021 visitor spending statistics were not available from January through June due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **OVERALL**

Key Performance Indicators

	YOY Rate	Jun'20 YTD	Jun'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{1/}	N/A	N/A	4,864.4	9,711.8
Daily Spend (\$PPPD) ^{1/}	N/A	N/A	177.3	185.4
Visitor Days	34.5%	20,402,181	27,431,121	52,372,004
Arrivals	27.6%	2,156,234	2,751,849	5,510,247
Daily Census	35.2%	112,100	151,553	143,485
Airlift (scheduled seats)	22.8%	3,519,173	4,322,816	11,882,593

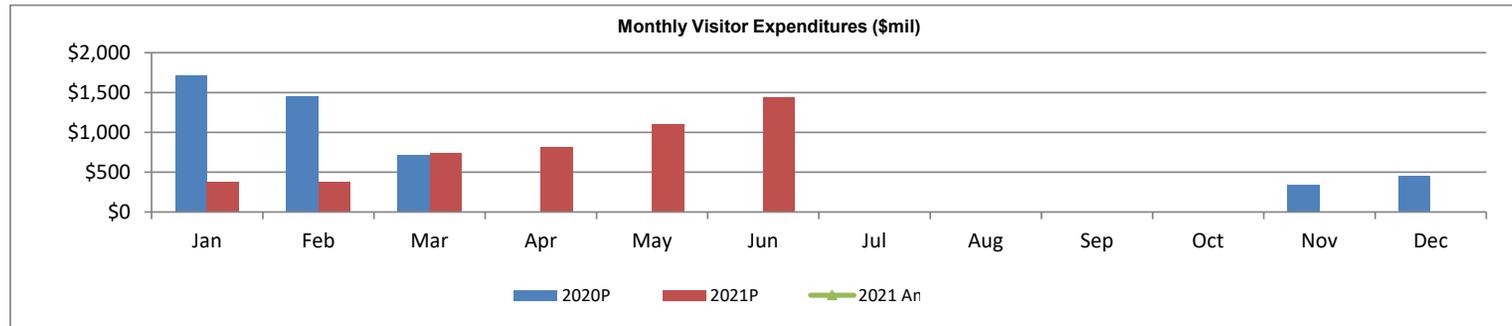
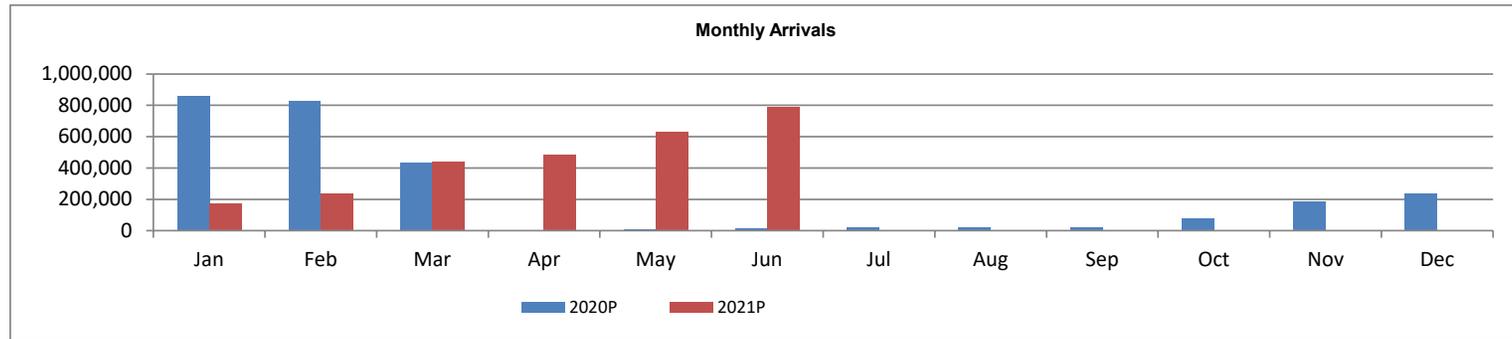
	YOY Rate	YTD
O'ahu	6.0%	1,319,874
Maui	62.2%	984,154
Moloka'i	-29.0%	10,295
Lāna'i	19.1%	17,843
Kaua'i	-13.4%	245,722
Hawai'i Island	23.1%	485,861

^{1/} DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of May 25, 2021, subject to change.

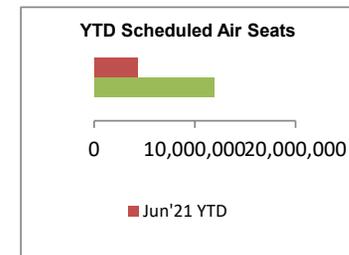
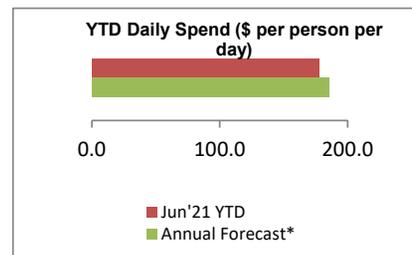
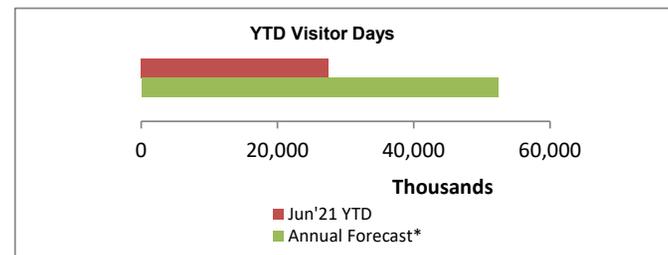
^J June YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

^u June YTD 2021 visitor spending statistics were from U.S. West, U.S. East, and Japan. Spending data from Canada were from January through February only; and data from all other markets were not available due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **U.S. TOTAL**

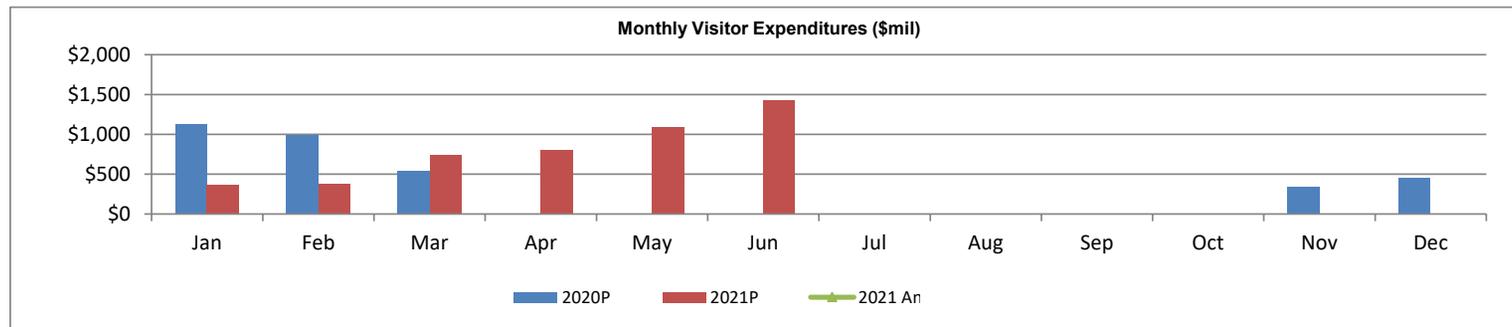
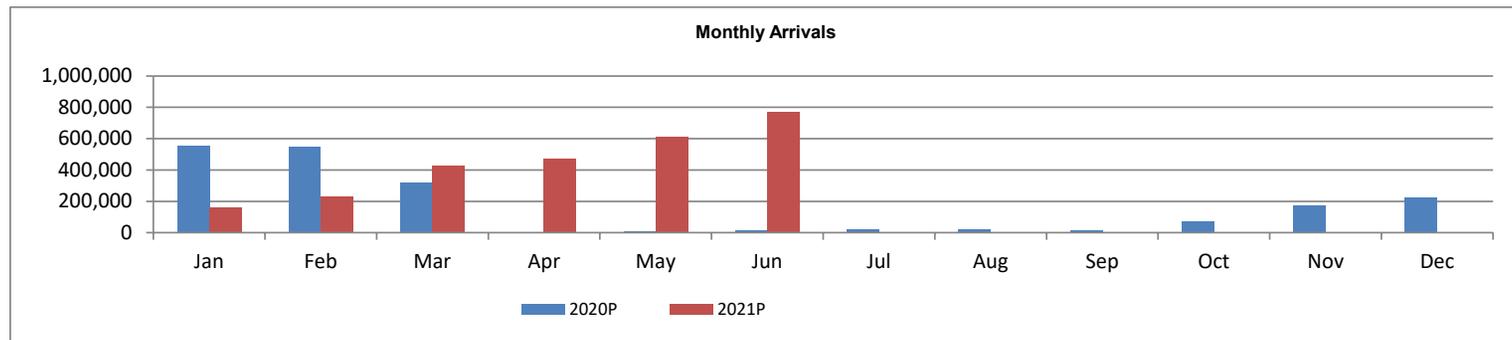
Key Performance Indicators

	YOY Rate	Jun'20 YTD	Jun'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ²⁾	N/A	N/A	4,819.5	7,833.4
Daily Spend (\$PPPD) ²⁾	N/A	N/A	182.7	184.1
Visitor Days	85.0%	14,255,793	26,374,897	42,553,079
Arrivals	84.2%	1,451,670	2,673,818	4,403,876
Daily Census	86.0%	78,329	145,718	116,584
Airlift (scheduled seats)	60.0%	2,615,602	4,184,364	10,489,752

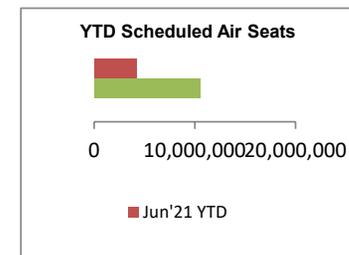
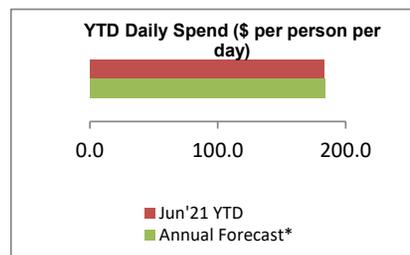
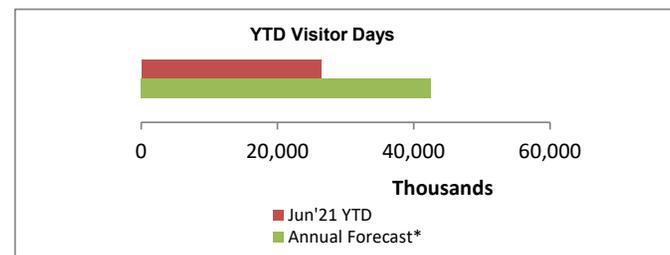
	YOY Rate	YTD
O'ahu	78.6%	1,270,987
Maui	100.0%	962,839
Moloka'i	1.0%	9,940
Lāna'i	48.8%	17,297
Kaua'i	2.3%	240,166
Hawai'i Island	66.6%	474,631

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of May 25, 2021, subject to change.
 June YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **U.S. WEST**

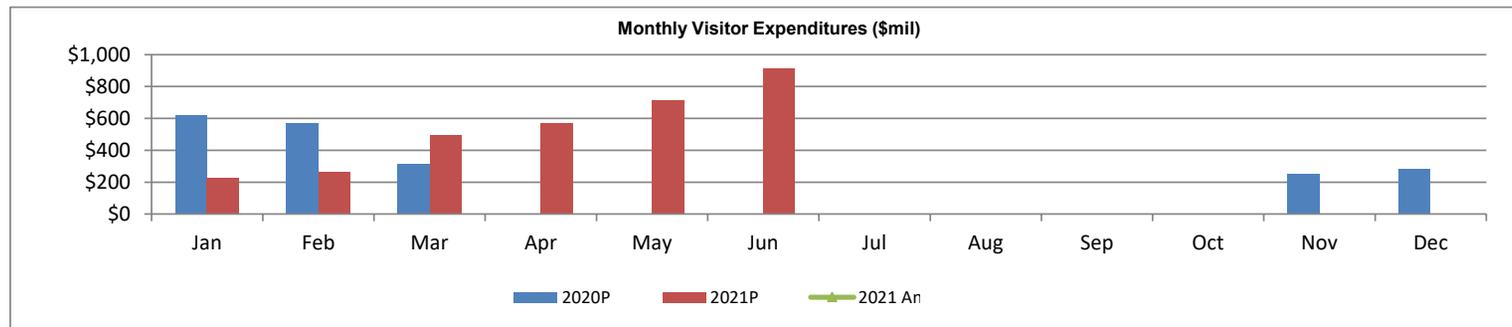
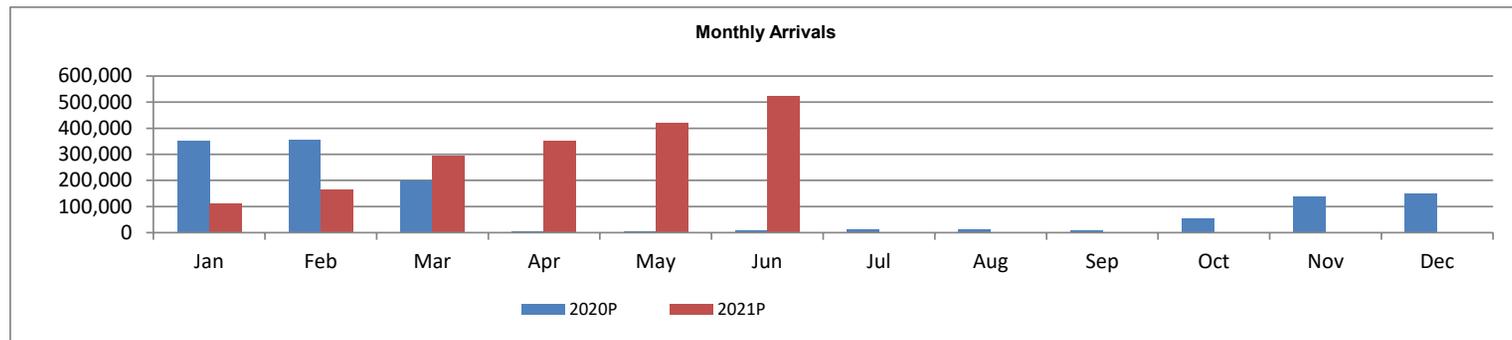
Key Performance Indicators

	YOY Rate	Jun'20 YTD	Jun'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{3/}	N/A	N/A	3,187.7	4,850.7
Daily Spend (\$PPPD) ^{3/}	N/A	N/A	178.8	173.0
Visitor Days	105.9%	8,656,296	17,827,133	28,031,536
Arrivals	101.1%	927,890	1,865,897	3,002,696
Daily Census	107.1%	47,562	98,492	76,799
Airlift (scheduled seats)	61.3%	2,276,449	3,672,379	9,170,935

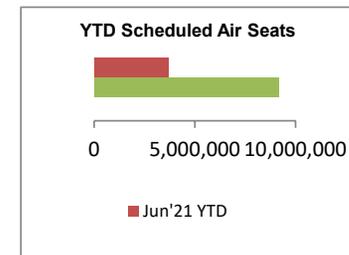
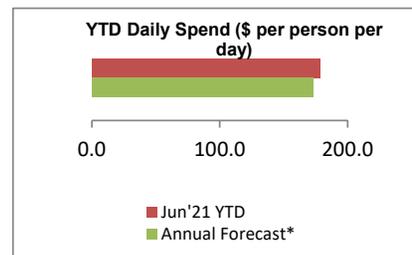
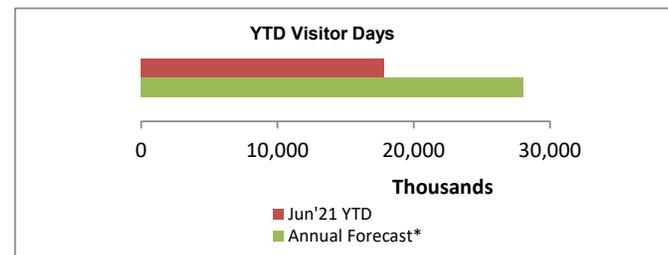
	YOY Rate	YTD
O'ahu	94.9%	811,797
Maui	131.4%	688,201
Moloka'i	12.1%	6,570
Lāna'i	69.8%	10,497
Kaua'i	15.5%	166,107
Hawai'i Island	86.7%	329,301

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Digo Mi flight schedules as of May 25, 2021, subject to change.
 June YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **U.S. EAST**

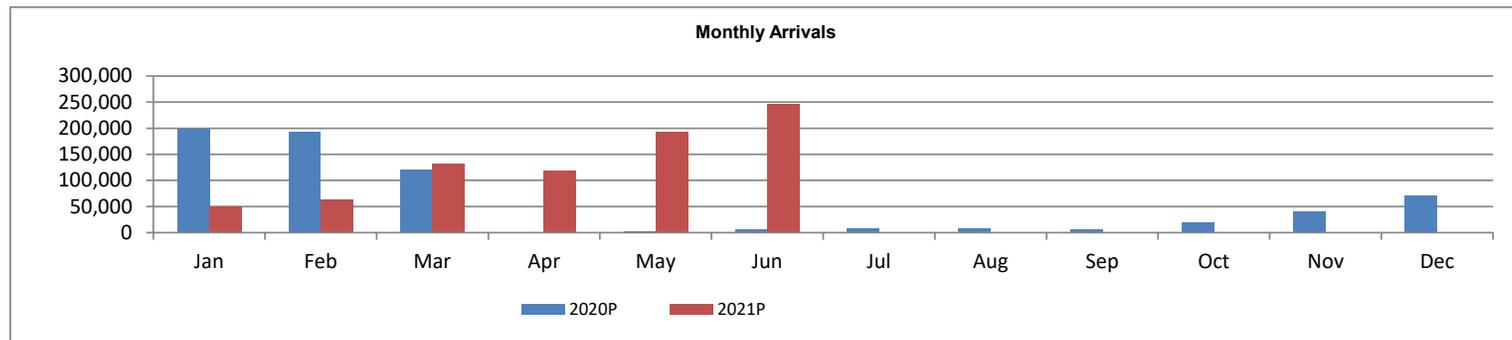
Key Performance Indicators

	YOY Rate	Jun'20 YTD	Jun'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{4/}	N/A	N/A	1,631.7	2,982.6
Daily Spend (\$PPPD) ^{4/}	N/A	N/A	190.9	205.4
Visitor Days	52.7%	5,599,497	8,547,763	14,521,543
Arrivals	54.2%	523,780	807,922	1,401,180
Daily Census	53.5%	30,766	47,225	39,785
Airlift (scheduled seats)	51.0%	339,153	511,985	1,318,817

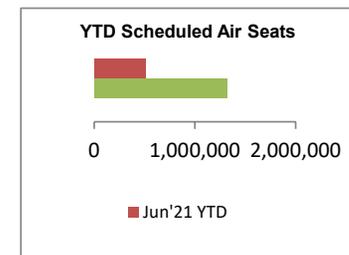
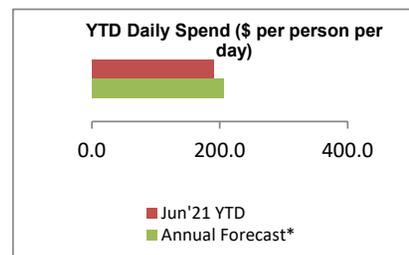
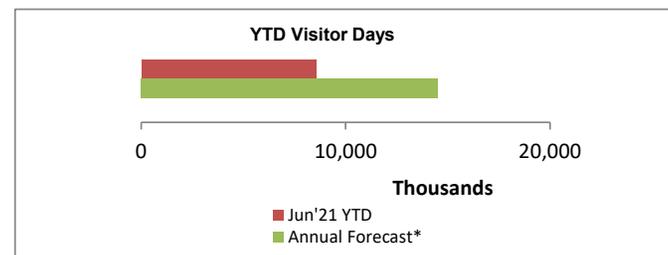
	YOY Rate	YTD
O'ahu	55.5%	459,189
Maui	49.2%	274,638
Moloka'i	-15.4%	3,371
Lāna'i	25.0%	6,800
Kaua'i	-18.7%	74,059
Hawai'i Island	33.9%	145,329

^{4/} DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of May 25, 2021, subject to change.
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Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **CANADA**

Key Performance Indicators

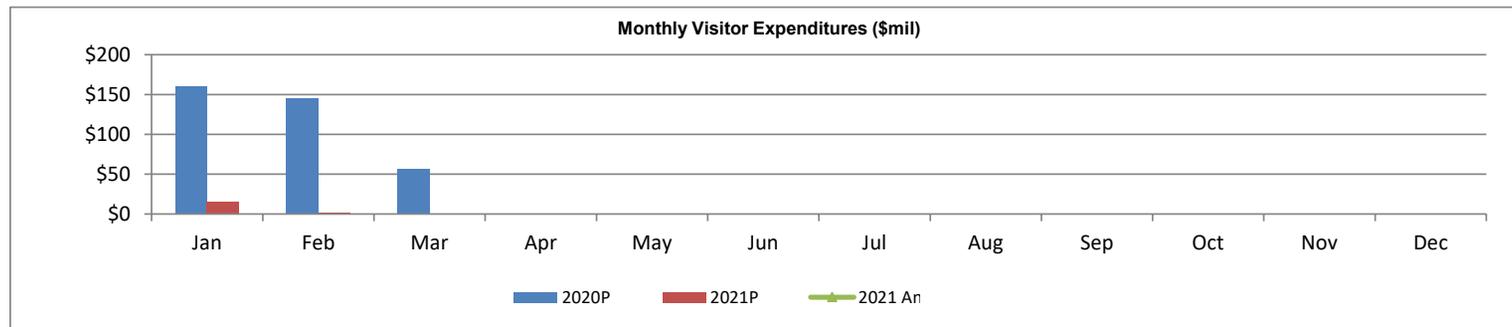
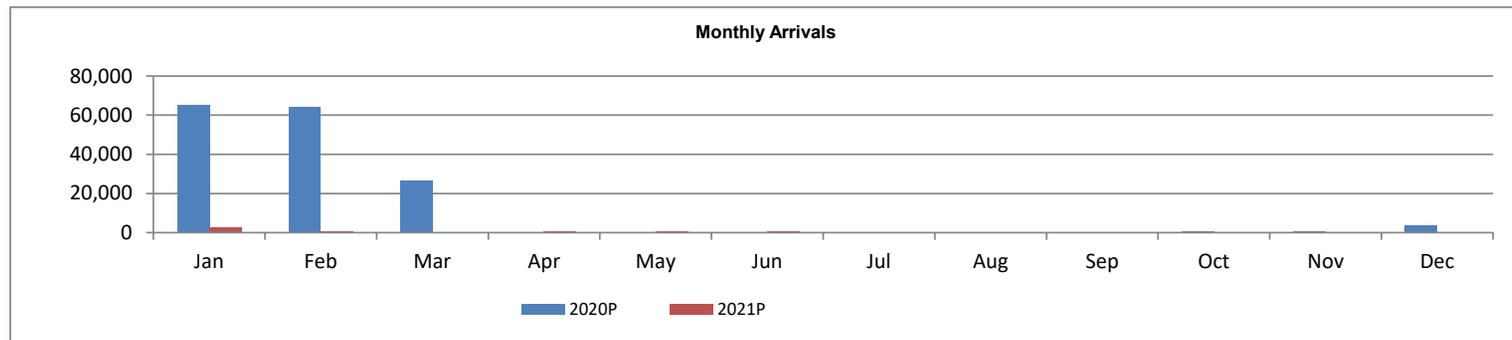
	YOY Rate	Jun'20 YTD	Jun'21 YTD	Annual Forecast*	Arrivals	YOY Rate	YTD
Visitor Spending (\$mil) ^{5f}	N/A	N/A	17.2	449.3	O'ahu	-96.9%	1,886
Daily Spend (\$PPPD) ^{5f}	N/A	N/A	119.2	168.6	Maui	-96.1%	2,777
Visitor Days	-93.0%	2,057,170	144,383	2,664,375	Moloka'i	-97.5%	26
Arrivals	-96.5%	155,821	5,434	195,431	Lāna'i	-96.7%	52
Daily Census	-92.9%	11,303	798	7,300	Kaua'i	-99.0%	228
Airlift (scheduled seats)	-86.6%	164,881	22,160	142,350	Hawai'i Island	-97.2%	999

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Dīo Mi flight schedules as of May 25, 2021, subject to change.

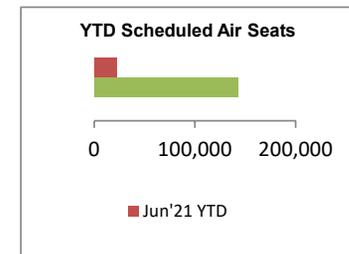
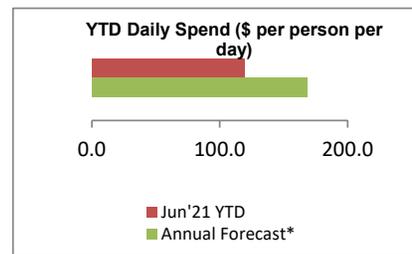
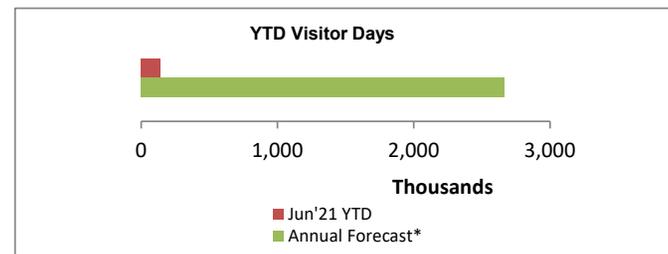
^J June YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

^u June YTD 2021 visitor spending statistics were from January through February only. Spending data from March through April were not available due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **JAPAN**

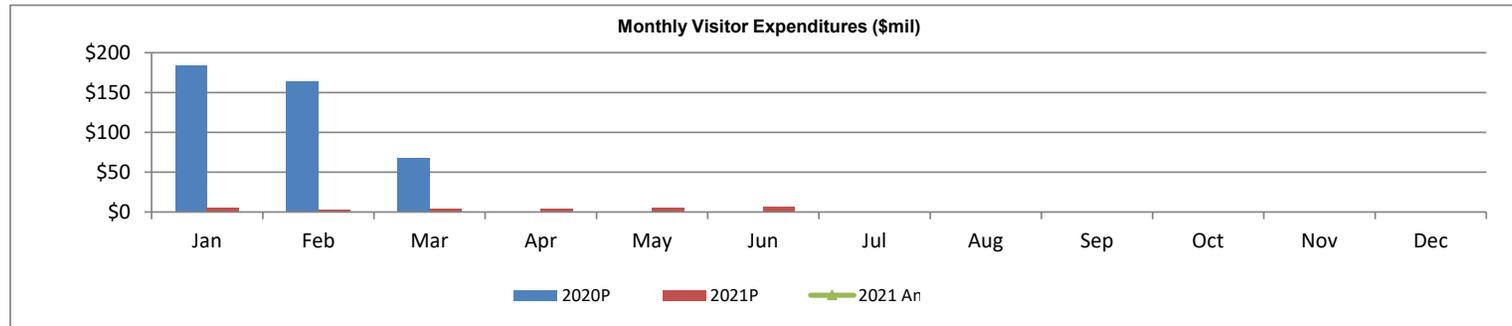
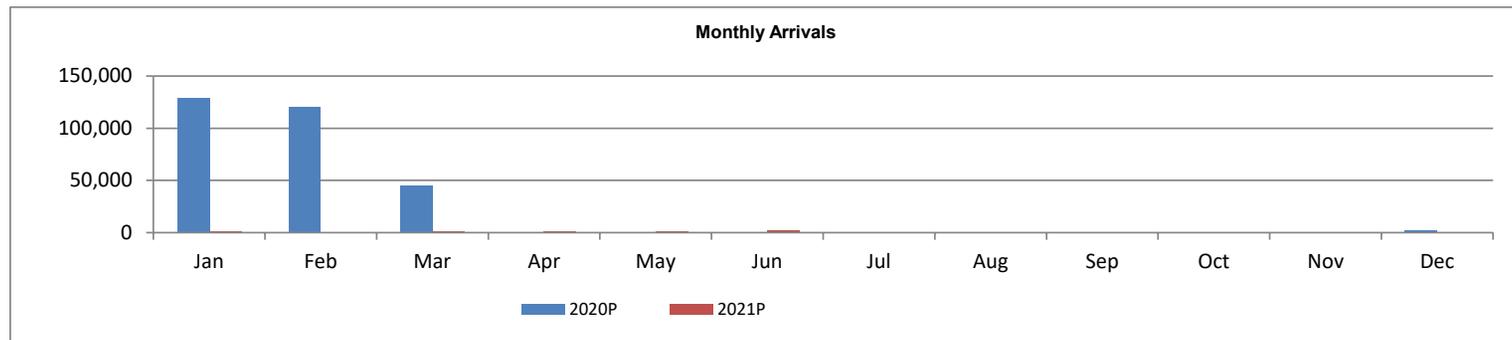
Key Performance Indicators

	YOY Rate	Jun'20 YTD	Jun'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{6/}	N/A	N/A	27.7	454.4
Daily Spend (\$PPPD) ^{6/}	N/A	N/A	215.8	227.4
Visitor Days	-92.6%	1,732,604	128,471	1,998,302
Arrivals	-97.5%	294,295	7,448	347,802
Daily Census	-92.5%	9,520	710	5,475
Airlift (scheduled seats)	-88.2%	466,072	55,071	692,529

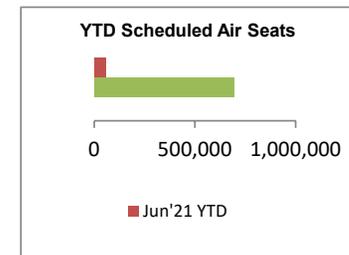
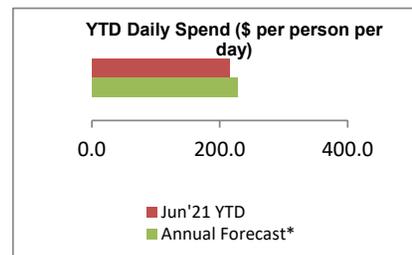
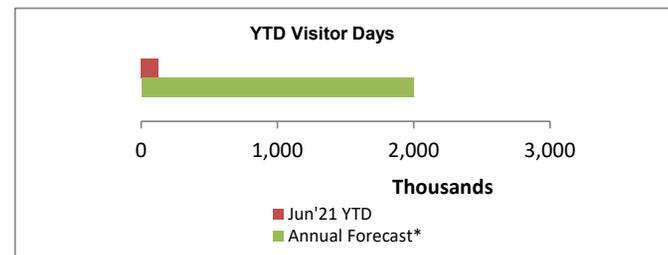
	YOY Rate	YTD
O'ahu	-97.4%	7,177
Maui	-97.8%	175
Moloka'i	-98.4%	7
Lāna'i	-94.1%	8
Kaua'i	-98.1%	69
Hawai'i Island	-99.3%	248

^{6/} DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diiō Mi flight schedules as of May 25, 2021, subject to change.
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Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **OCEANIA**

Key Performance Indicators

	YOY Rate	Jun'20 YTD	Jun'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{7f}	N/A	N/A	N/A	202.8
Daily Spend (\$PPPD) ^{7f}	N/A	N/A	N/A	258.0
Visitor Days	-97.1%	568,180	16,353	786,033
Arrivals	-98.4%	60,816	969	82,654
Daily Census	-97.1%	3,122	90	2,154
Airlift (scheduled seats)	-100.0%	95,737	0	89,956

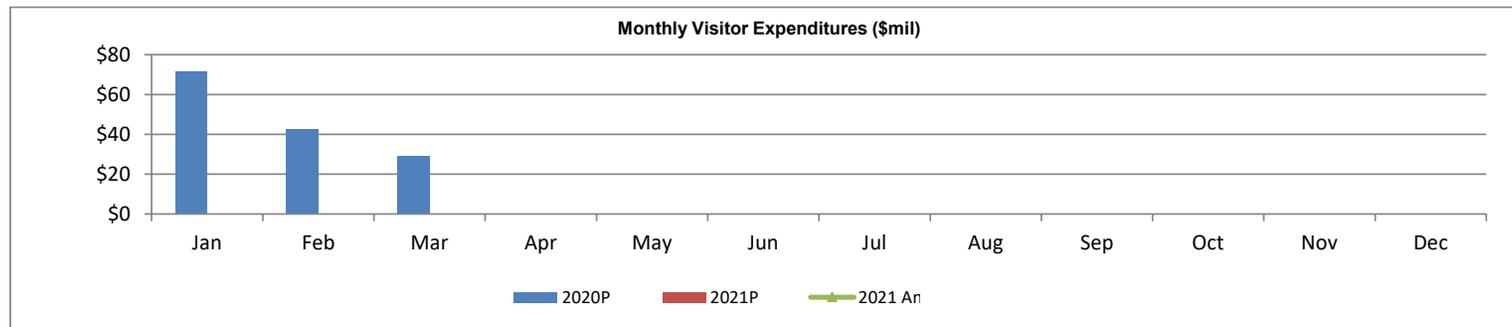
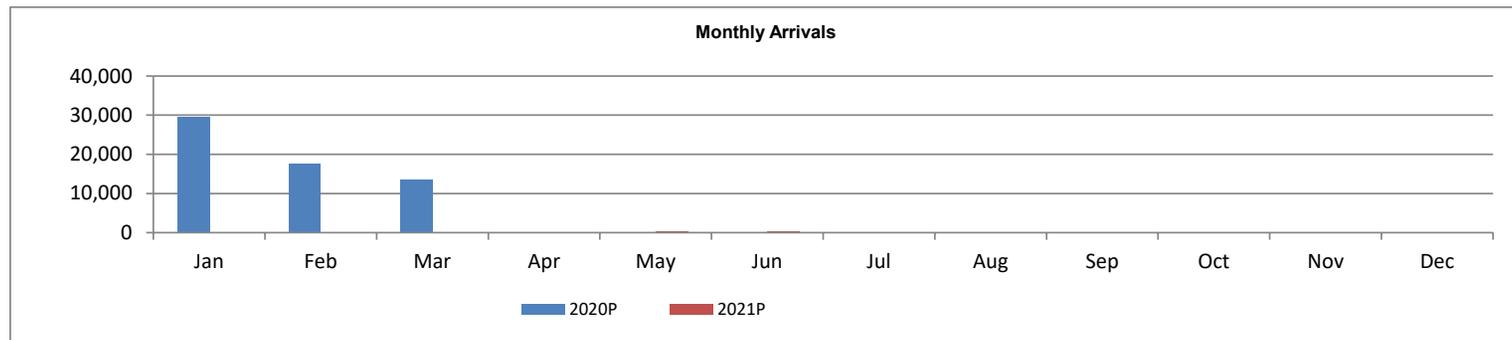
	YOY Rate	YTD
O'ahu	-99.1%	551
Maui	-96.9%	266
Moloka'i	-98.6%	12
Lāna'i	-98.1%	16
Kaua'i	-97.1%	145
Hawai'i Island	-97.4%	196

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diiō Mi flight schedules as of May 25, 2021, subject to change.

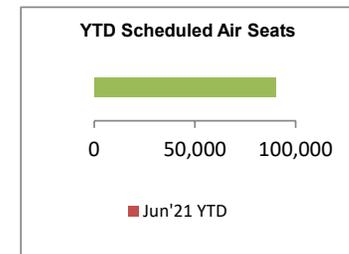
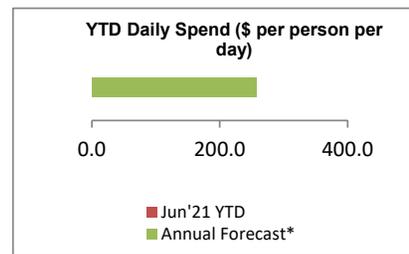
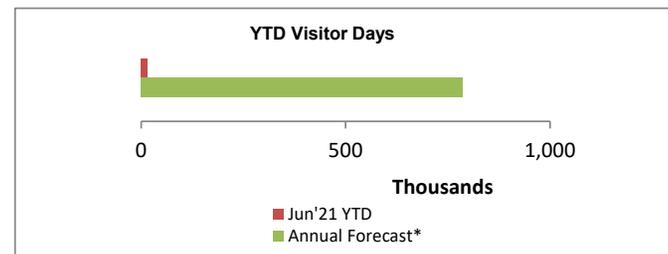
^J June YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

^u June YTD 2021 visitor spending statistics were not available from January through April due to limited samples.

Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **EUROPE**

Key Performance Indicators

	YOY Rate	Jun'20 YTD	Jun'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{8/}	N/A	N/A	N/A	106.4
Daily Spend (\$PPPD) ^{8/}	N/A	N/A	N/A	146.7
Visitor Days	-78.9%	270,107	57,075	725,338
Arrivals	-81.2%	20,488	3,842	55,102
Daily Census	-78.8%	1,484	315	1,987
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

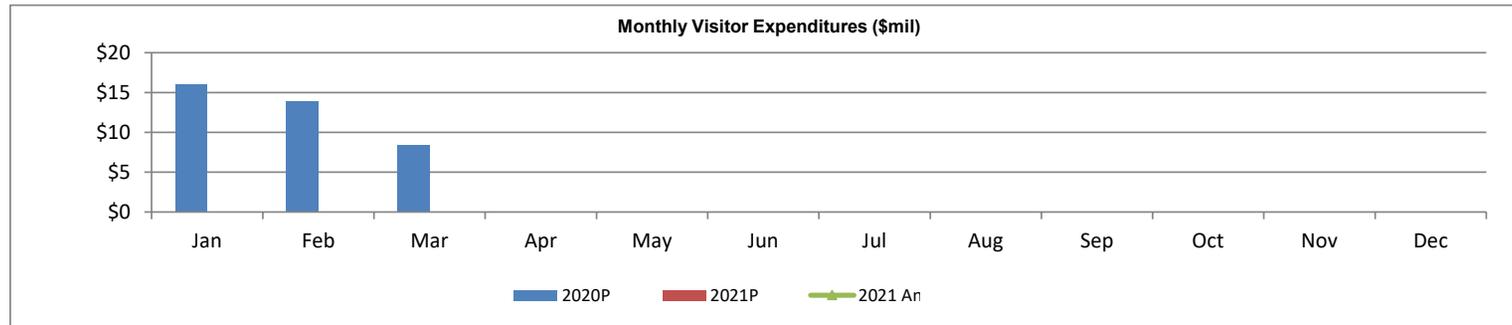
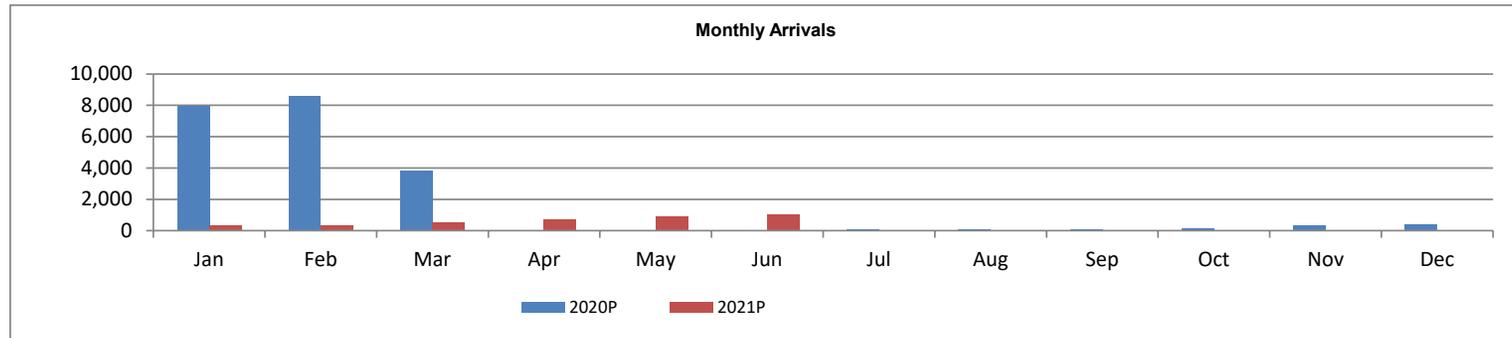
	YOY Rate	YTD
O'ahu	-85.6%	2,132
Maui	-85.5%	1,205
Moloka'i	-91.1%	32
Lāna'i	-83.4%	40
Kaua'i	-90.7%	457
Hawai'i Island	-87.5%	816

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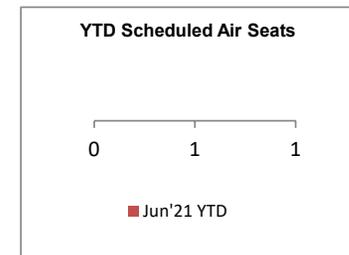
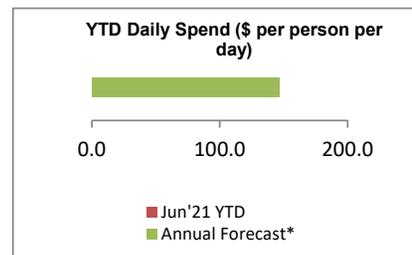
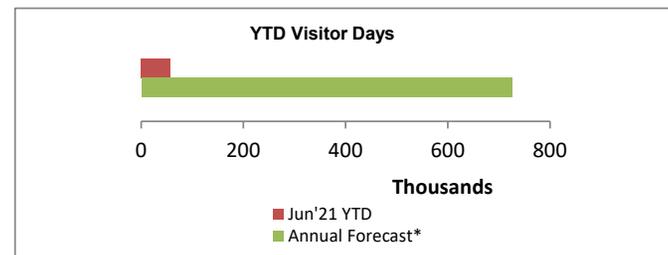
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Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **OTHER ASIA**

Key Performance Indicators

	YOY Rate	Jun'20 YTD	Jun'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{9/}	N/A	N/A	N/A	NA
Daily Spend (\$PPPD) ^{9/}	N/A	N/A	N/A	NA
Visitor Days	-81.4%	490,582	91,320	NA
Arrivals	-90.6%	57,066	5,364	NA
Daily Census	-81.3%	2,696	505	NA
Airlift (scheduled seats)	-100.0%	86,695	0	127,746

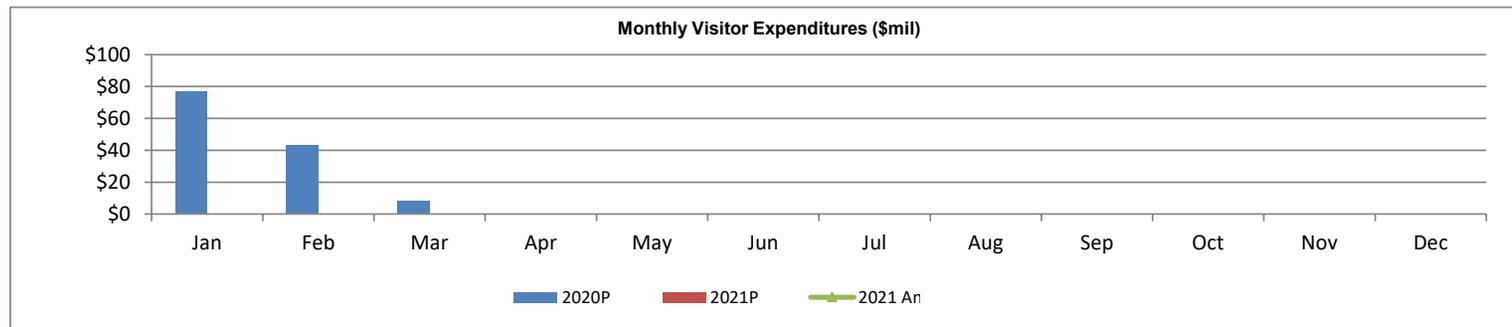
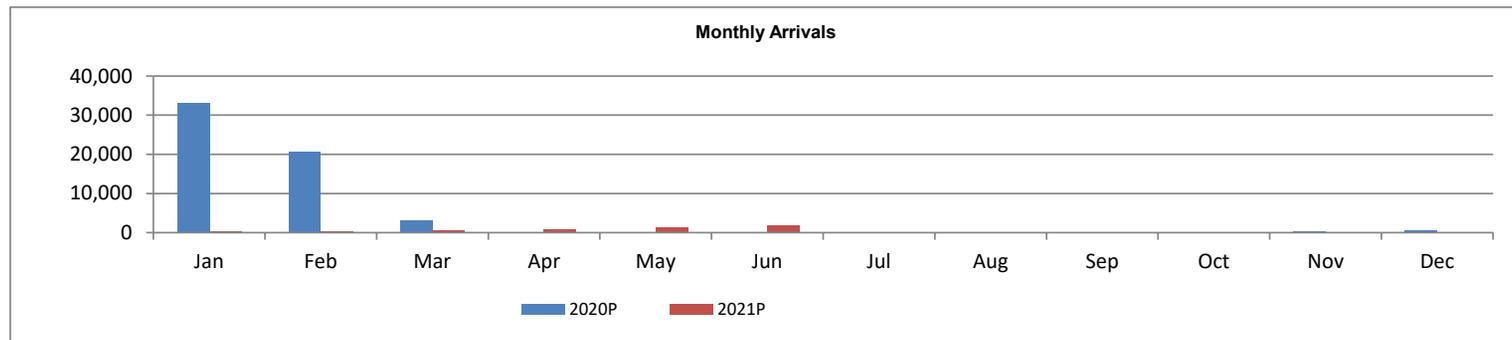
	YOY Rate	YTD
O'ahu	-92.3%	4,308
Maui	-88.3%	928
Moloka'i	-84.5%	25
Lāna'i	-77.5%	45
Kaua'i	-81.5%	382
Hawai'i Island	-91.4%	996

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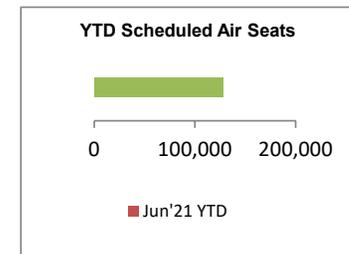
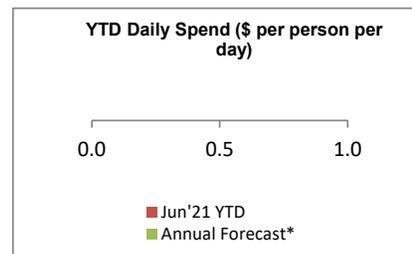
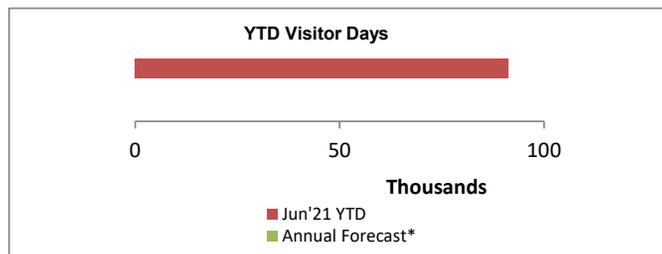
⁹ June YTD 2020 visitor spending statistics were not available, as there was no fielding between April through October due to COVID19.

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Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **KOREA**

Key Performance Indicators

	YOY Rate	Jun'20 YTD	Jun'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{10/}	N/A	N/A	N/A	127.0
Daily Spend (\$PPPD) ^{10/}	N/A	N/A	N/A	278.2
Visitor Days	-83.9%	349,018	56,161	456,698
Arrivals	-94.2%	41,672	2,429	55,102
Daily Census	-83.8%	1,918	310	1,251
Airlift (scheduled seats)	-85.2%	71,175	10,564	105,102

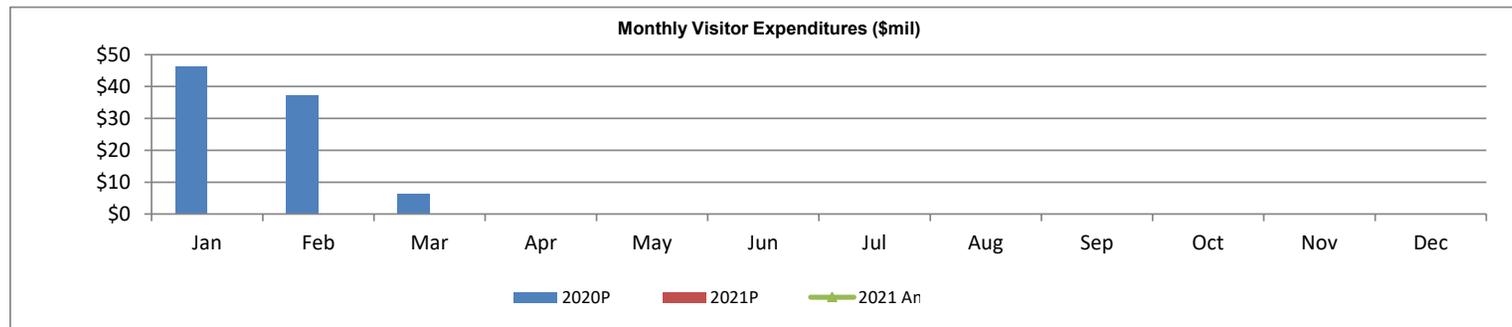
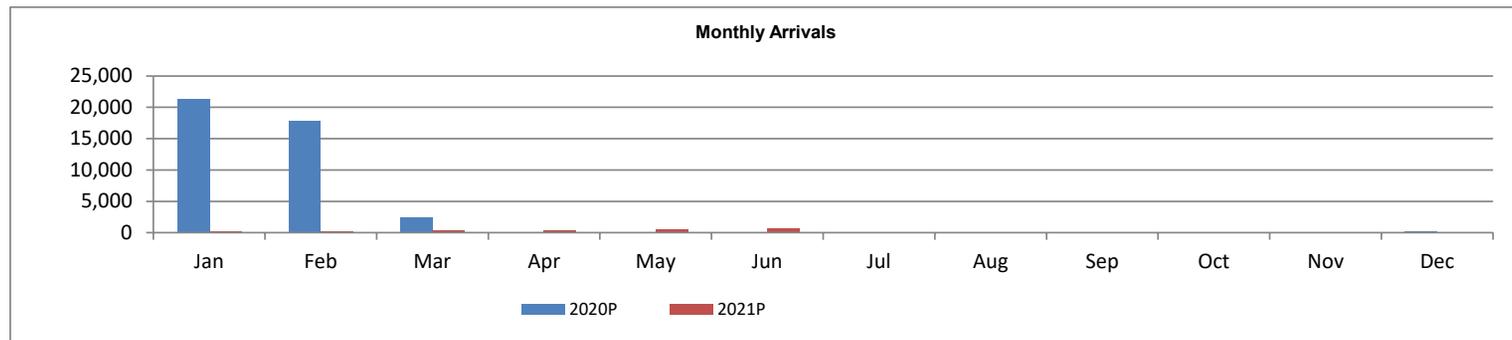
	YOY Rate	YTD
O'ahu	-94.9%	2,113
Maui	-94.2%	243
Moloka'i	-96.5%	2
Lāna'i	-91.0%	8
Kaua'i	-92.3%	93
Hawai'i Island	-95.5%	275

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Dilo Mi flight schedules as of May 25, 2021, subject to change.

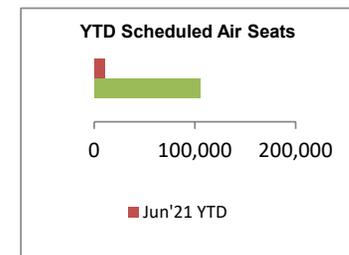
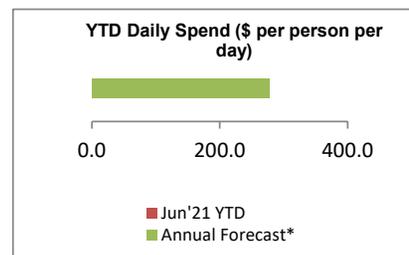
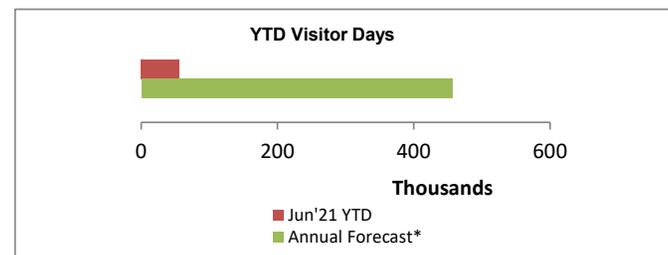
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Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

HTA Key Performance Indicators Dashboard

Hawai'i Tourism Authority Report Date: **Jun-21** Preliminary

Visitor Industry Performance Measures

Market: **LATIN AMERICA**

Key Performance Indicators

	YOY Rate	Jun'20 YTD	Jun'21 YTD	Annual Forecast*
Visitor Spending (\$mil) ^{11/}	N/A	N/A	N/A	NA
Daily Spend (\$PPPD) ^{11/}	N/A	N/A	N/A	NA
Visitor Days	-33.8%	54,868	36,342	NA
Arrivals	-46.2%	5,115	2,753	NA
Daily Census	-33.4%	301	201	NA
Airlift (scheduled seats)	N/A	N/A	N/A	N/A

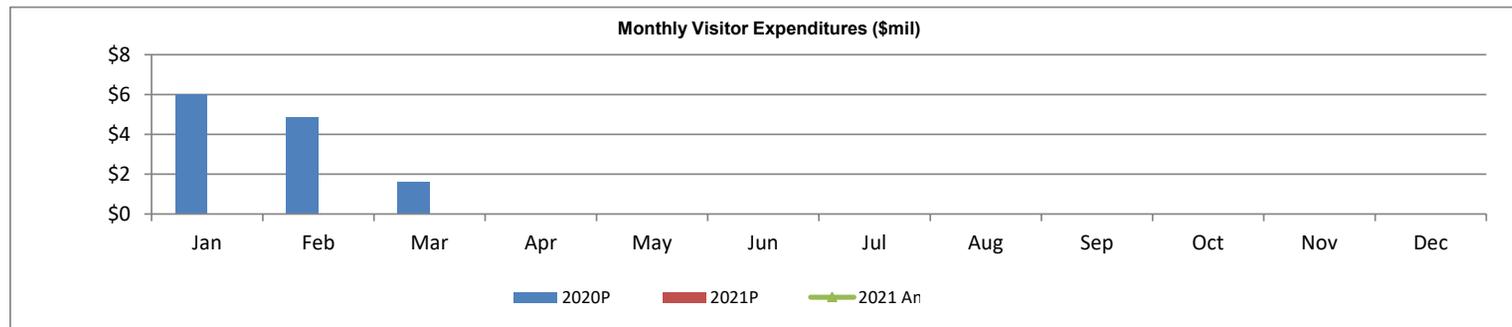
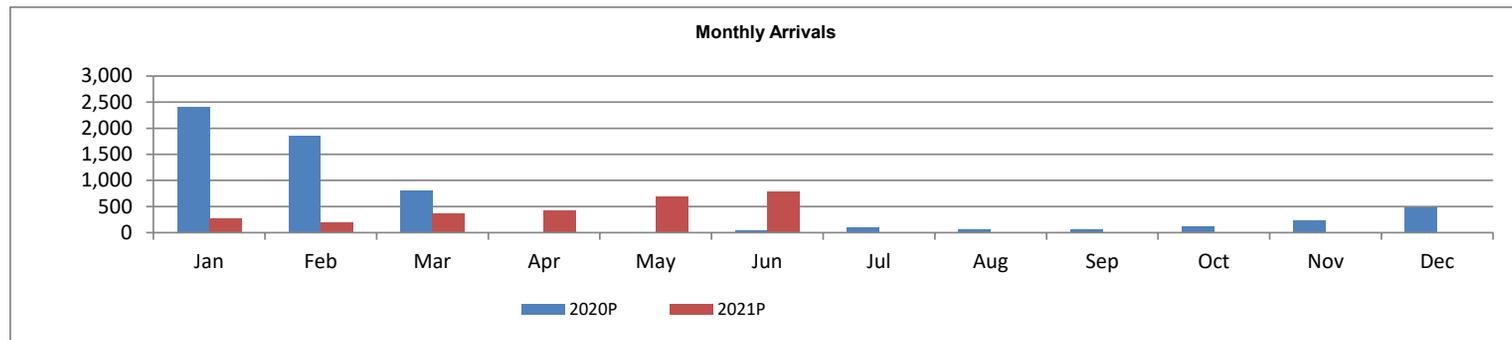
	YOY Rate	YTD
O'ahu	-55.5%	1,735
Maui	-39.8%	1,036
Moloka'i	-36.6%	13
Lāna'i	-23.4%	38
Kaua'i	-67.3%	186
Hawai'i Island	-29.5%	542

* DBEDT Annual Forecast as of Q1 2021; 2021 seats forecast by HTA based on Diio Mi flight schedules as of May 25, 2021, subject to change.

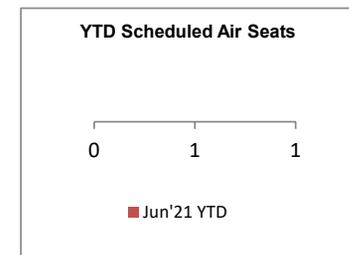
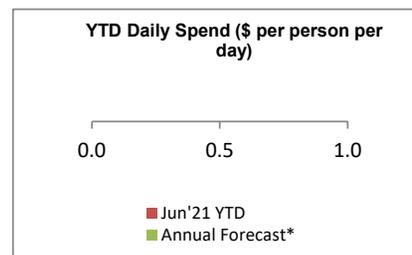
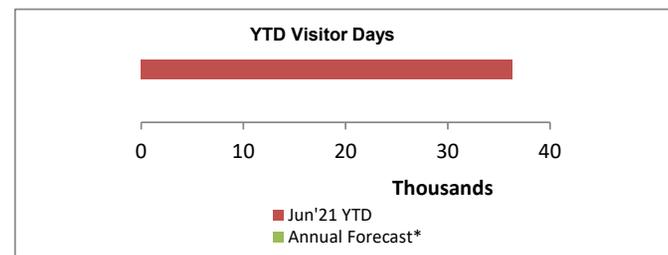
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Monthly Indicators



Annual Indicators



* Excludes Supplemental Business Expenditures

10

Report of the *Marketing Standing Committee* with the Committee's Recommendations to Support three RFPs for the US Major Market Area, Global MCI, Global Support Services for Discussion and Action by the Board



HTA MARKETING STANDING COMMITTEE MEETING

July 28, 2021

2021 MMA Contract Updates

Contractor	Program	Contract Amt	Contract Effective Date	Contract End Date	Contract Options
HVCB*	2021 BMP - USA	\$17,000,000 (base)	12/21/20	12/31/21	none
HVCB	2021 Support Services	\$1,467,500	12/2/20	12/31/21	4 one-year
HVCB	2021 Island Chapters Staffing & Administration	\$2,400,000	12/2/20	12/31/21	none
a.link	2021 BMP - Japan	\$4,500,000	12/21/20	12/31/21	none
VoX International	2021 BMP - Canada	\$400,000	12/17/20	12/31/21	none
The Walshe Group	2021 BMP - Oceania	\$400,000	12/21/20	12/31/23	2 one-year
Aviareps Marketing Garden	2021 BMP - Korea	\$300,000	12/21/21	12/31/22	2 one-year

**Supp 17 pending DAGS. S17 includes an amendment to the 2021 payment schedule, reduction of -\$492,464 for unspent funds (previous years), and addition of \$50,000 to refresh Hawai'i travel tips, extend resident targeted media and heavy-up post-arrival visitor media.*

2022 MMA Contract Updates

Contractor	Program	Contract Amt	Contract Effective Date	Contract End Date	Contract Options	Contract Status As of 7/28/21
HVCB	2022 Island Chapters Staffing & Administration	\$2,400,000	6/23/21	12/31/22	none	DAGS approved on 7/2/21
a.link	2022 BMP - Japan	\$9,000,000	6/16/21	12/31/22	none	DAGS approved on 6/25/21
VoX International	2022 BMP - Canada	\$800,000	6/17/21	12/31/22	none	DAGS approved on 7/12/21
The Walshe Group	2022 BMP - Oceania	\$1,900,00	6/16/21	12/31/23	2 one-year	DAGS approved on 6/24/21
Aviareps Marketing Garden	2022 BMP - Korea	\$1,400,000	6/15/21	12/31/22	2 one-year	DAGS approved on 6/28/21
ITRAVLOCAL	2022 BMP - China	\$1,800,000	6/15/21	12/31/22	none	DAGS approved on 6/30/21
Access Cruise, Inc.	Cruise Consultant	\$50,000	11/16/20	9/30/23	2 one-year	Need to execute Supplemental Contract to add FY22 Budget

2022 RFP Planning Update

RFP Release Date: August (tentative)

- United States Major Market Area
- Global Meetings, Conventions & Incentives
- Global Support Services

2022 Brand Marketing Plan (BMP) Updates

- BMP Key Marketing Objectives: added emphasis on visitor and industry education for responsible travel and Mālama Hawai‘i / regenerative tourism.
- BMP Performance Measures: updated to align with HTA’s Papahana Ho‘okele Huliau.
- BMP Outlines Release and Submission for Global MMAs: scheduled to coincide with the timeline of USA MMA RFP.

2021 MMA Budget vs. Actuals

MMA Contract	Contract Amt	YTD Budget (Jan-Jun)	YTD Actual (Jan-Jun)	YTD Variance (Jan-Jun)	Contract Bal
USA TOTAL	\$17,000,000	\$7,294,666	\$7,272,175	\$22,491	\$9,727,825
-Leisure	\$14,605,000	\$6,175,998	\$6,161,560	\$14,438	\$8,443,440
-MCI	\$2,395,000	\$1,118,668	\$1,110,615	\$8,053	\$1,284,385
Support Services	\$1,467,500	\$882,252	\$833,769	\$48,483	\$633,731
Island Chapters	\$2,400,000	\$1,200,000	\$1,092,946	\$107,054	\$1,307,054
Japan	\$4,500,000	\$1,025,598	\$1,032,715	-\$7,117	\$3,467,285
Canada	\$400,000	\$86,220	\$87,948	-\$1,728	\$312,052
Oceania	\$400,000	\$77,196	\$87,162	-\$9,966	\$312,838
Korea	\$300,000	\$62,250	\$61,845	\$405	\$238,155

2021 MMA Marketing Promotions Re-Start

	Re-Start Date
Japan	November
Canada	August
Oceania	November

2021 MMA Marketing Promotions

	Started
USA	May
Korea	July



HTA Fall and Spring Tourism Updates

- Fall – September
- Spring – March



HAWAII TOURISM AUTHORITY

Marketing Standing Committee Meeting

July 28, 2021

Agenda

1. Market Insights
2. Mālama Hawai'i
 1. Marketing Campaign Update
 2. Program Update
3. Vaccination Exception Outreach





Market Insights

Scheduled U.S. Non-Stop Seats to Hawai'i June – August 2019, 2021

Preliminary as of 7/20/21 –Subject to adjustment

	# of SEATS June 2019	# of SEATS June 2021P	% Change of Seats June 2021/19	# of SEATS July 2019	# of SEATS July 2021P	% Change of Seats July 2021/19	# of SEATS August 2019	# of SEATS August 2021P	% Change of Seats August 2021/19
O'ahu	441,174	500,040	13.3%	462,801	566,771	22.5%	453,028	552,748	22.0%
Maui	257,829	307,887	19.4%	273,254	345,135	26.3%	248,915	334,946	34.6%
Kona	104,573	126,530	21.0%	110,095	139,829	27.0%	98,448	138,535	40.7%
Kaua'i	90,144	87,527	-2.9%	94,336	101,869	8.0%	86,220	105,708	22.6%
Hilo	4,700	5,178	10.2%	5,146	5,549	7.8%	4,804	5,549	15.5%
Total	898,420	1,027,162	14.3%	945,632	1,159,153	22.6%	886,611	1,137,486	28.3%

Scheduled U.S. Non-Stop Seats to Hawai'i September – October 2019, 2021

Preliminary as of 7/20/21 –Subject to adjustment

	# of SEATS September 2019	# of SEATS September 2021P	% Change of Seats September 2021/19	# of SEATS October 2019	# of SEATS October 2021P	% Change of Seats October 2021/19
O'ahu	382,095	472,127	23.6%	399,574	472,127	18.2%
Maui	197,711	275,093	39.1%	211,816	275,093	29.9%
Kona	64,956	119,118	83.4%	72,590	119,118	64.1%
Kaua'i	63,608	100,317	57.7%	72,357	100,317	38.6%
Hilo	3,486	4,117	18.1%	4,648	4,117	-11.4%
Total	711,856	970,772	36.4%	760,985	970,772	27.6%

Scheduled Transpac Non-Stop Seats to Hawai'i (all markets)

June – August 2019, 2021

Preliminary as of 7/20/21 –Subject to adjustment

	# of SEATS July 2019	# of SEATS July 2021P	% Change	# of SEATS August 2019	# of SEATS August 2021P	% Change
O'ahu	746,579	592,555	-21%	746,985	586,681	-21%
Maui	281,408	345,407	23%	257,291	338,709	32%
Kona	119,878	140,019	17%	108,231	138,535	28%
Kaua'i	94,336	101,869	8%	86,220	105,708	23%
Hilo	5,146	5,549	8%	4,804	5,549	16%
Total	1,247,347	1,185,399	-5%	1,203,531	1,175,182	-2%

Scheduled Transpac Non-Stop Seats to Hawai'i (all markets)

September - November 2019, 2021

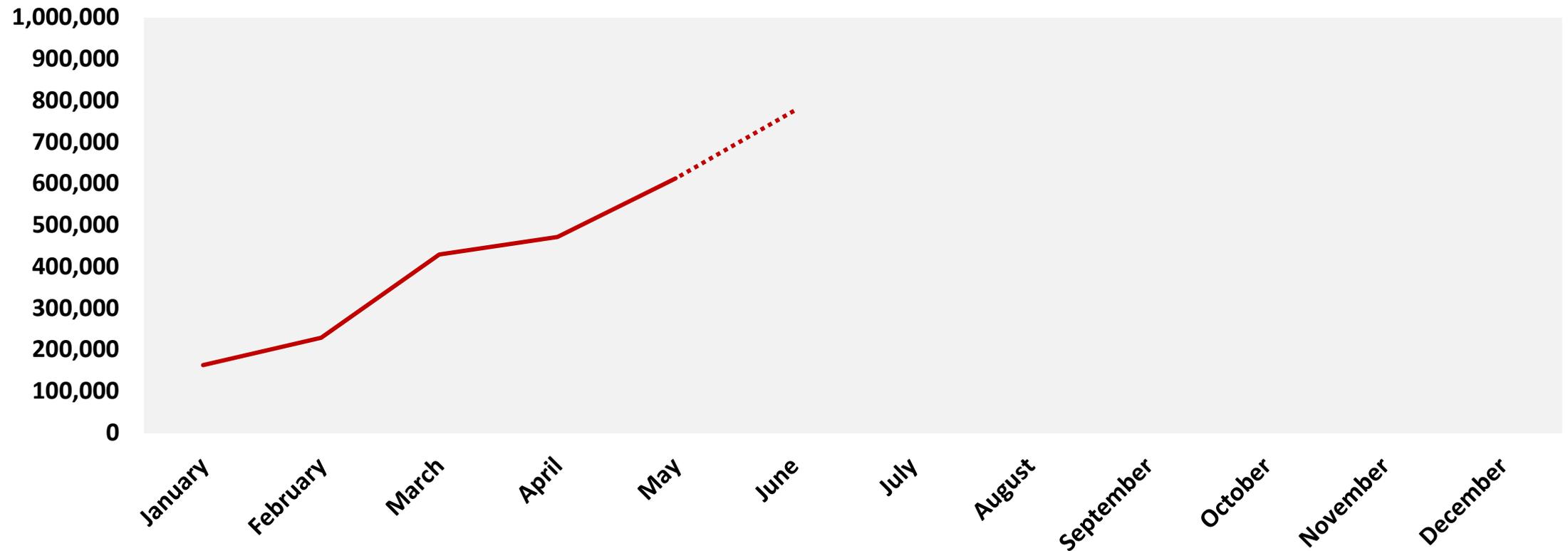
Preliminary as of 7/20/21 –Subject to adjustment

	# of SEATS September 2019	# of SEATS September 2021P	% Change	# of SEATS October 2019	# of SEATS October 2021P	% Change	# of SEATS November 2019	# of SEATS November 2021P	% Change
O'ahu	660,257	531,002	-20%	673,909	633,359	-6%	656,979	669,144	2%
Maui	204,791	281,968	38%	222,366	282,515	27%	231,519	308,040	33%
Kona	74,540	119,118	60%	83,243	134,501	62%	93,109	142,802	53%
Kaua'i	63,608	100,317	58%	72,879	107,413	47%	81,170	114,819	41%
Hilo	3,486	4,117	18%	4,648	5,019	8%	3,818	4,980	30%
Total	1,006,682	1,036,522	3%	1,057,045	1,162,807	10%	1,066,595	1,239,785	16%

U.S. Visitation to State of Hawai'i 2021P

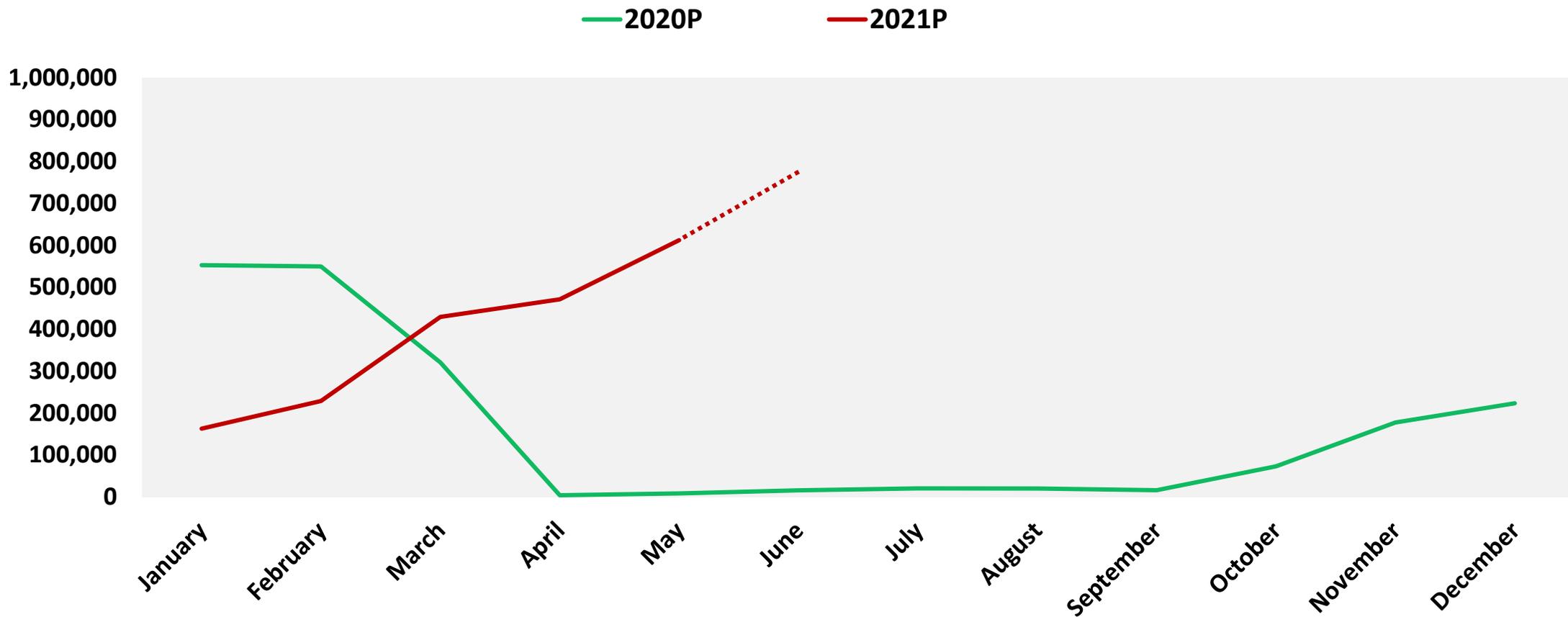
Total U.S. Visitors

— 2021P



U.S. Visitation to State of Hawai'i 2021P - 2020P

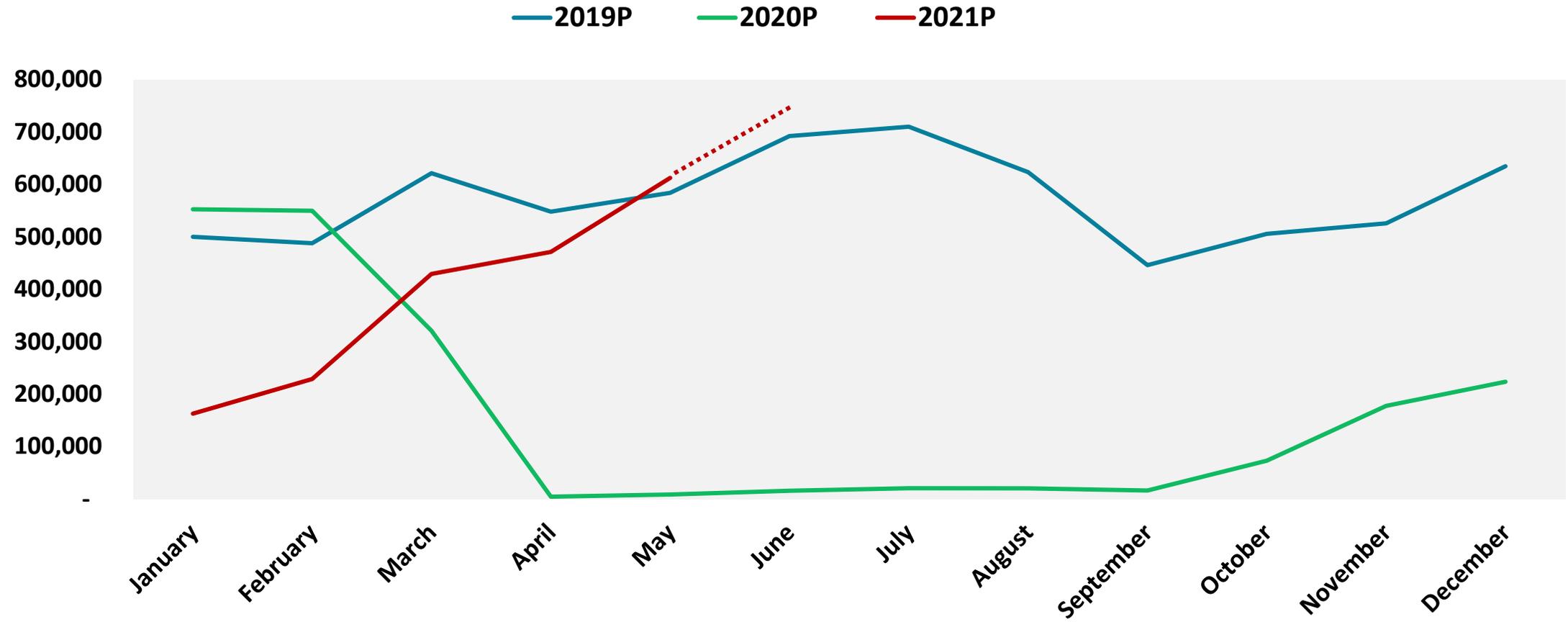
Total U.S. Visitors



Source: HVCB analysis of HTA data, 2019-2020P

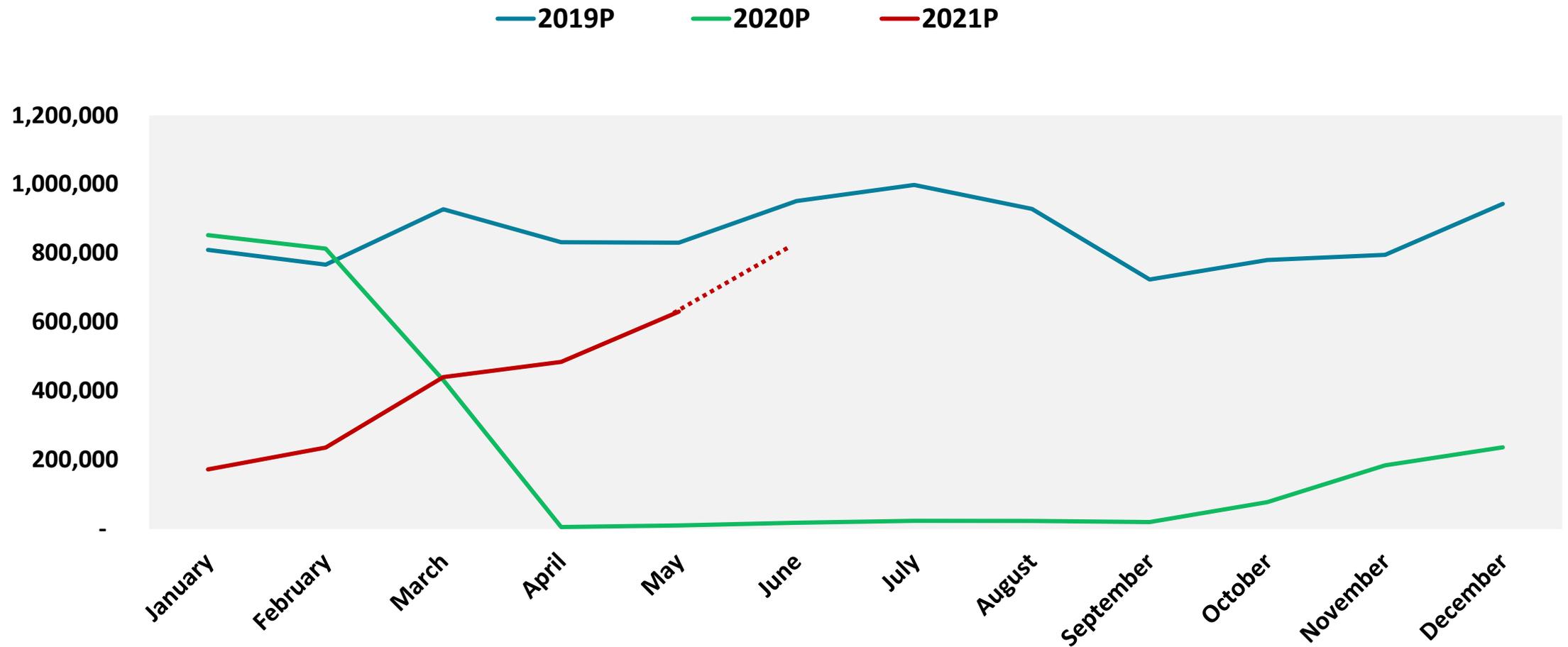
U.S. Visitation to State of Hawai'i 2021P - 2019

Total U.S. Visitors



Source: HVCB analysis of HTA data, 2019-2021P

Visitation to State of Hawai'i All Markets - 2021P - 2019



Hawai'i Hotel Performance June 2021 vs 2019

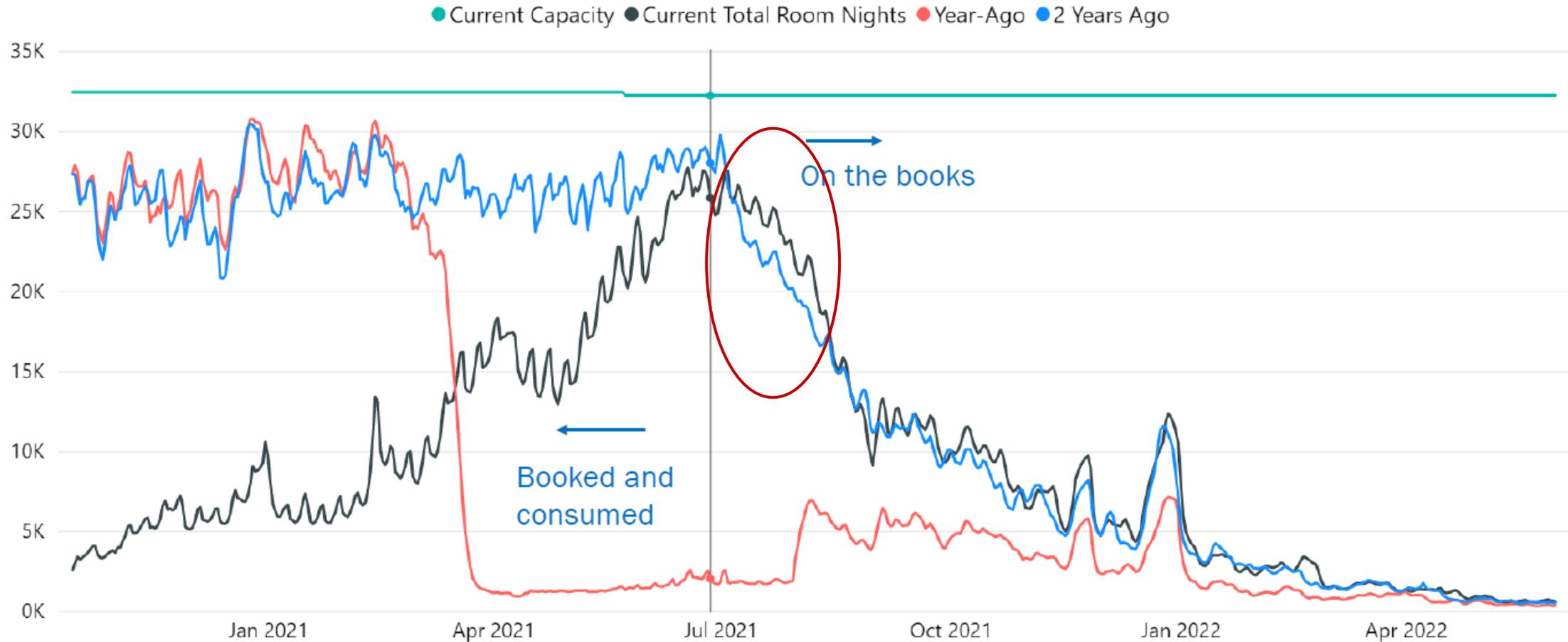
Occupancy, ADR, RevPAR

	Occupancy %			Average Daily Rate			RevPAR		
	2021	2019	Percentage Pt. Change	2021	2019	% Change	2021	2019	% Change
State of Hawai'i	77.0%	83.9%	-6.9%	\$320.30	\$280.51	14.2%	\$246.75	\$235.44	4.8%
Luxury Class	70.2%	80.0%	-9.8%	\$754.29	\$553.86	36.2%	\$529.54	\$443.10	19.5%
Upper Upscale Class	78.3%	86.6%	-8.3%	\$305.82	\$281.87	8.5%	\$239.57	\$244.19	-1.9%
Upscale Class	80.4%	81.2%	-0.8%	\$237.89	\$206.74	15.1%	\$191.23	\$167.94	13.9%
Upper Midscale Class	75.5%	86.5%	-11.0%	\$169.13	\$166.74	1.4%	\$127.69	\$144.23	-11.5%
Midscale & Economy Class	75.2%	81.9%	-6.7%	\$162.52	\$168.95	-3.8%	\$122.14	\$138.34	-11.7%
O'ahu	75.4%	87.9%	-12.5%	\$227.22	\$242.90	-6.5%	\$171.40	\$213.63	-19.8%
Waikīkī	76.2%	88.2%	-12.0%	\$218.07	\$237.35	-8.1%	\$166.18	\$209.37	-20.6%
Other O'ahu	70.7%	86.4%	-15.6%	\$287.70	\$277.10	3.8%	\$203.48	\$239.33	-15.0%
O'ahu Luxury	64.0%	87.9%	-23.9%	\$581.61	\$478.26	21.6%	\$372.01	\$420.43	-11.5%
O'ahu Upper Upscale	76.1%	89.3%	-13.2%	\$240.60	\$268.33	-10.3%	\$183.09	\$239.72	-23.6%
O'ahu Upscale	80.1%	89.3%	-9.2%	\$198.03	\$198.72	-0.3%	\$158.70	\$177.48	-10.6%
O'ahu Upper Midscale	74.2%	87.2%	-13.1%	\$156.78	\$162.77	-3.7%	\$116.26	\$141.95	-18.1%
O'ahu Midscale & Economy	71.0%	88.8%	-17.8%	\$130.16	\$142.58	-8.7%	\$92.43	\$126.64	-27.0%
Maui County	79.2%	80.6%	-1.4%	\$497.66	\$393.97	26.3%	\$394.26	\$317.57	24.1%
Wailea	75.3%	91.1%	-15.7%	\$789.57	\$616.71	28.0%	\$594.85	\$561.61	5.9%
Lahaina/Kā'anapali/Kapalua	81.7%	81.2%	0.4%	\$437.37	\$332.40	31.6%	\$357.21	\$270.05	32.3%
Other Maui County	76.4%	79.8%	-3.4%	\$572.65	\$473.97	20.8%	\$437.35	\$378.22	15.6%
Maui County Luxury	69.4%	85.1%	-15.7%	\$887.87	\$549.93	61.5%	\$616.07	\$468.15	31.6%
Maui County Upper Upscale & Upscale	83.5%	81.0%	2.5%	\$410.77	\$311.71	31.8%	\$342.94	\$252.50	35.8%
Island of Hawai'i	79.0%	78.4%	0.6%	\$355.61	\$249.05	42.8%	\$281.05	\$195.25	43.9%
Kohala Coast	81.2%	79.3%	1.9%	\$556.50	\$351.42	58.4%	\$451.69	\$278.68	62.1%
Kaua'i	78.4%	74.3%	4.1%	\$339.49	\$280.48	21.0%	\$266.16	\$208.42	27.7%

Statewide Total Room Nights on the Books

October 2020 through June 2022 YOY

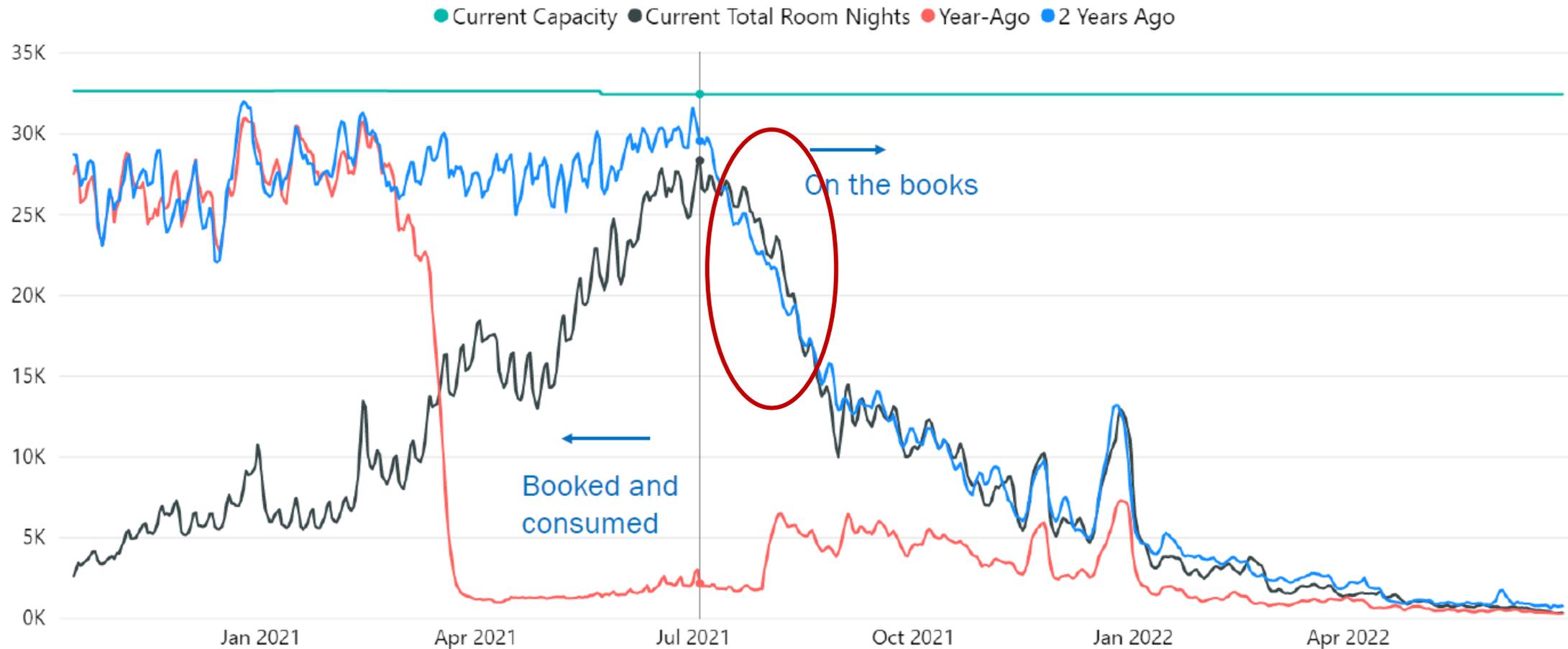
(as of June 27, 2021)



Statewide Total Room Nights on the Books

October 2020 through June 2022 YOY

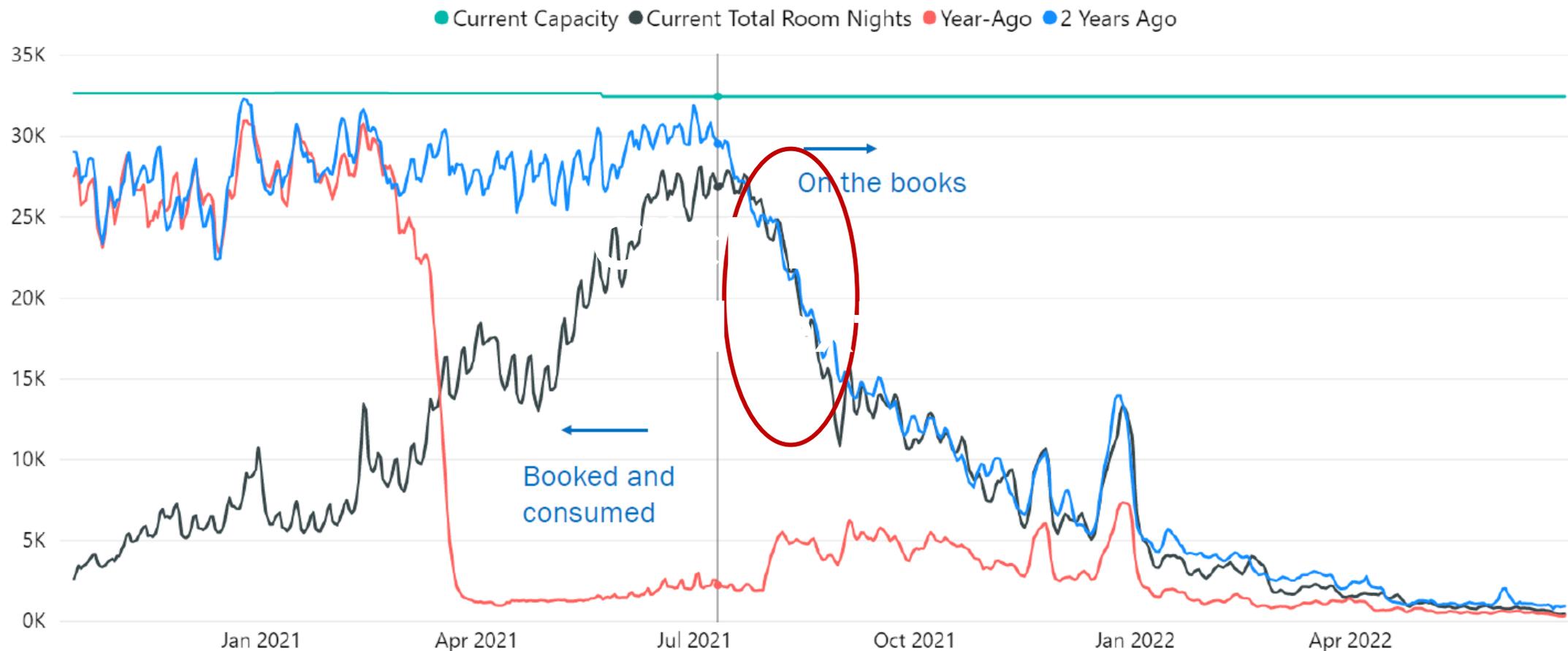
(as of July 4, 2021)



Statewide Total Room Nights on the Books

October 2020 through June 2022 YOY

(as of July 11, 2021)



U.S. Traveler Sentiment Overview

of July 12, 2021

Traveler Hesitance

Delta Variant is Giving American Travelers Pause

- 51% are less interested in traveling right now because of the variant and expect situation to get worse
- Why? Concern for own and someone else's safety, travel is overpriced, personal financial stress, and travel businesses are not fully staffed and/or customer service issues

Excitement To Travel

Overnight Trips are on the Rise

- Over half of American travelers took an overnight trip in the past months (52.2%, up from 44.6% the week of June 28th)
- They were overwhelmingly satisfied with their trips, despite some less satisfactory experiences with restaurants not being fully open (22.1%) and travel prices being high (20.5%)

Managed Tourism

Increase in travel continues to impact resident attitudes toward tourism

- 41% of Americans say they don't want tourists visiting their town.
- More so with males, millennials and parents of children under 18

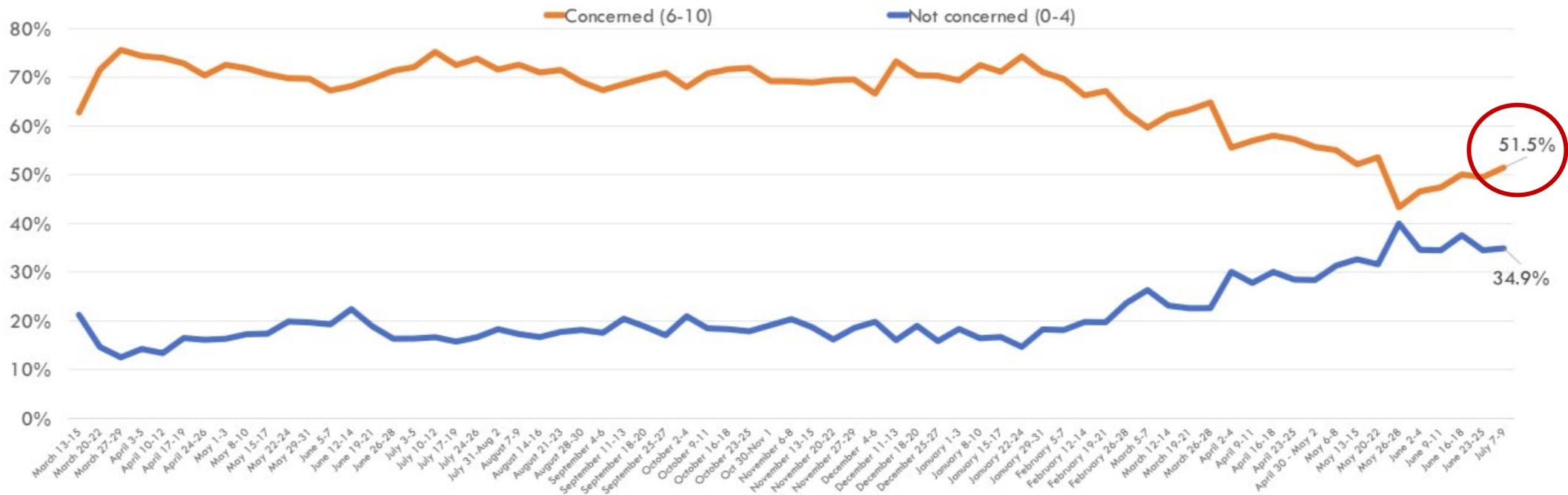
Sustainability

Travelers are increasingly environmentally conscious

- 52% consider environmental impact "important" or "very important" when planning their trip

U.S. Traveler Personal Health Concerns

Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? (Please answer using the scale below)

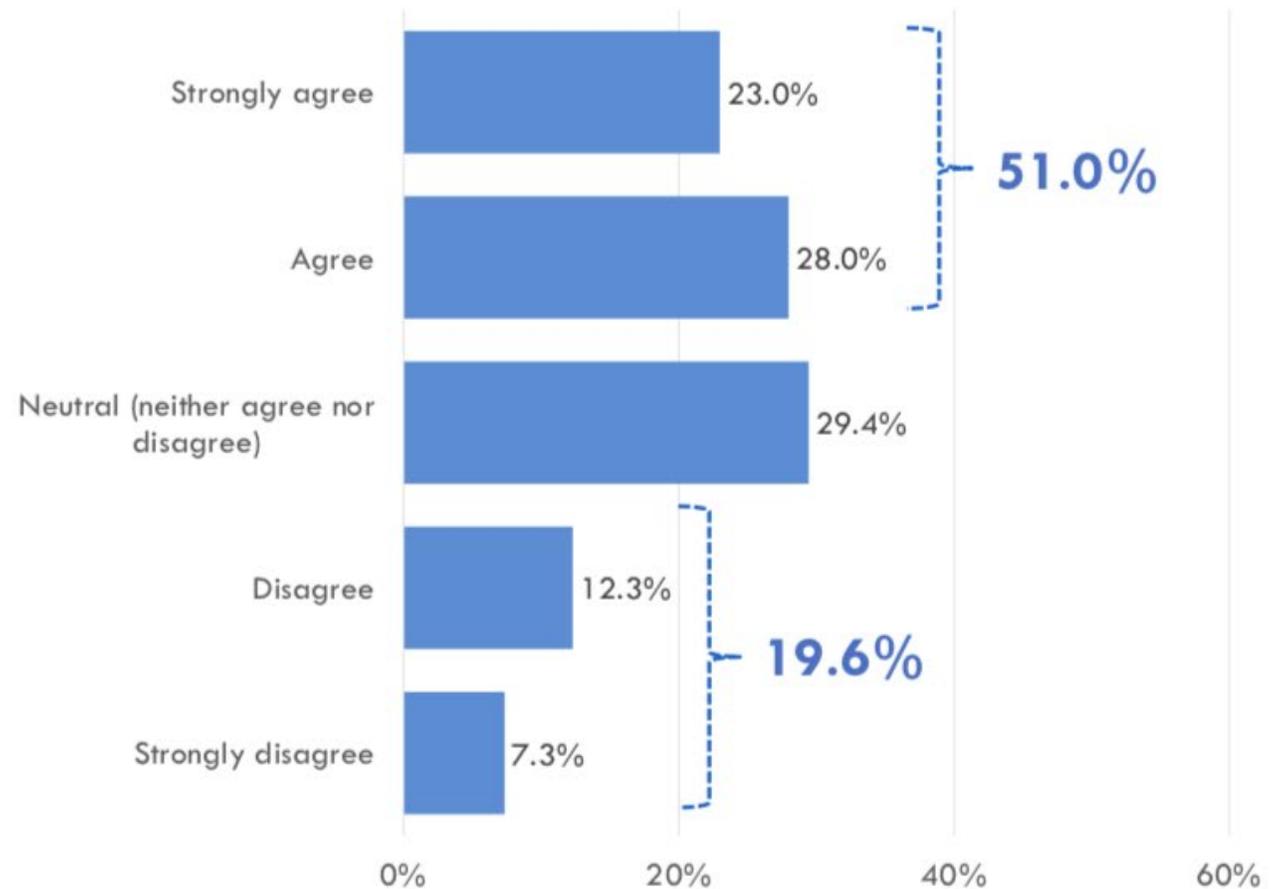


(Base: Waves 1-69. All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204, 1,200, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209, 1,204, 1,208, 1,202, 1,206, 1,202, 1,210, 1,215, 1,206, 1,205, 1,208, 1,201, 1,215, 1,217, 1,215, 1,200, 1,209 and 1,205 completed surveys.)

U.S. Traveler Concerns About the Delta Variant

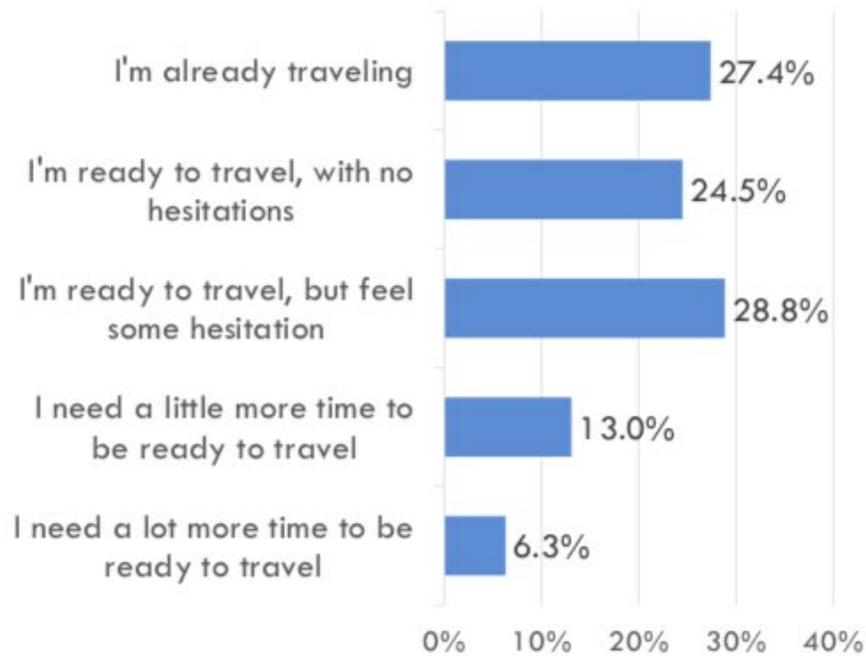
Question: Recent news about increasing “Delta Variant” cases makes me less interested in traveling right now.

(Base: Wave 69 data. All respondents, 1,205 completed surveys. Data collected July 7-9, 2021)

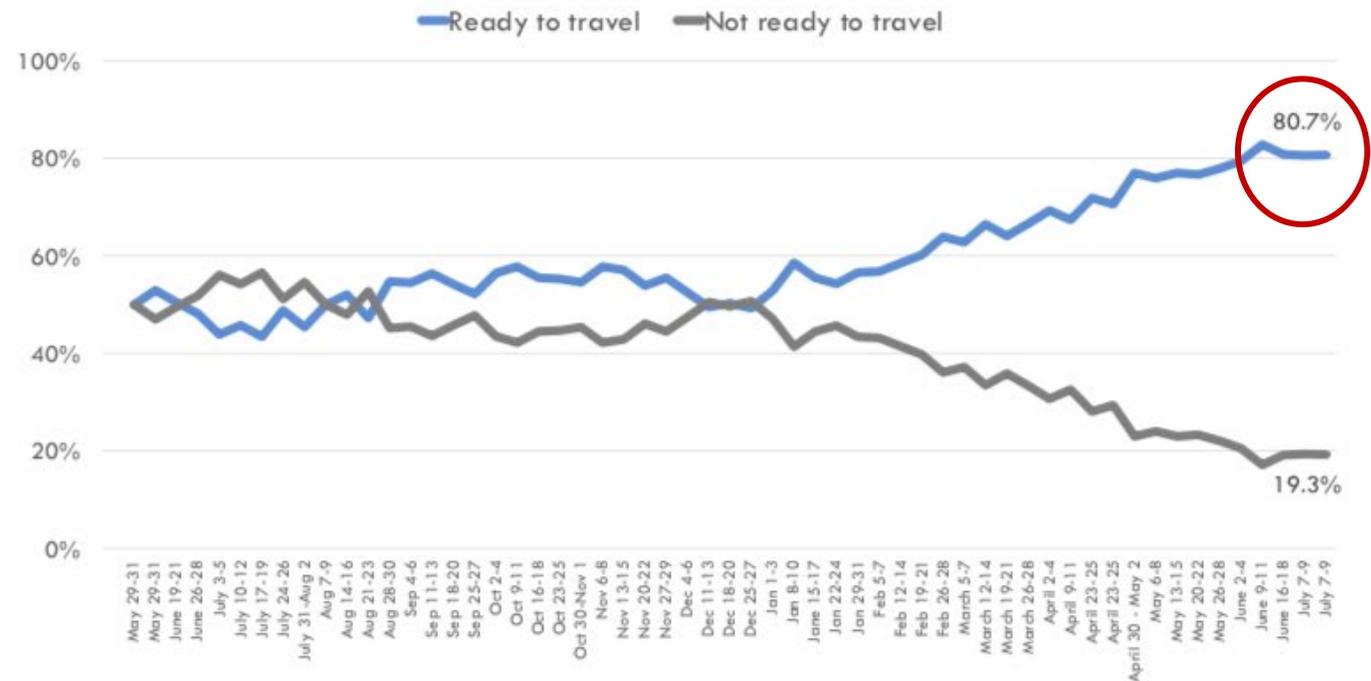


U.S. Traveler State-of-Mind

Question: When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)



Historical data

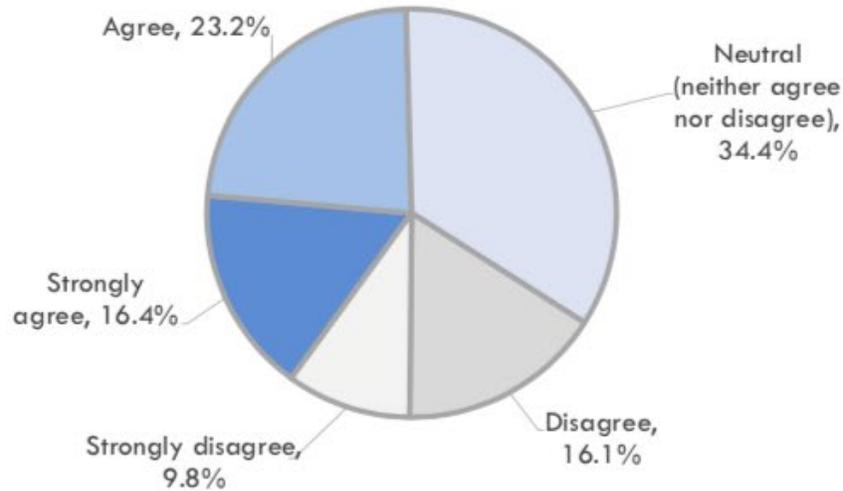


(Base: Waves 12-13 and 15-69. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,209, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,209, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209, 1,204, 1,208, 1,202, 1,206, 1,202, 1,210, 1,215, 1,206, 1,205, 1,208, 1,201, 1,215, 1,217, 1,215, 1,200, 1,209 and 1,205 completed surveys.)

U.S. Travelers Desire for Tourists in Their Own Community Now

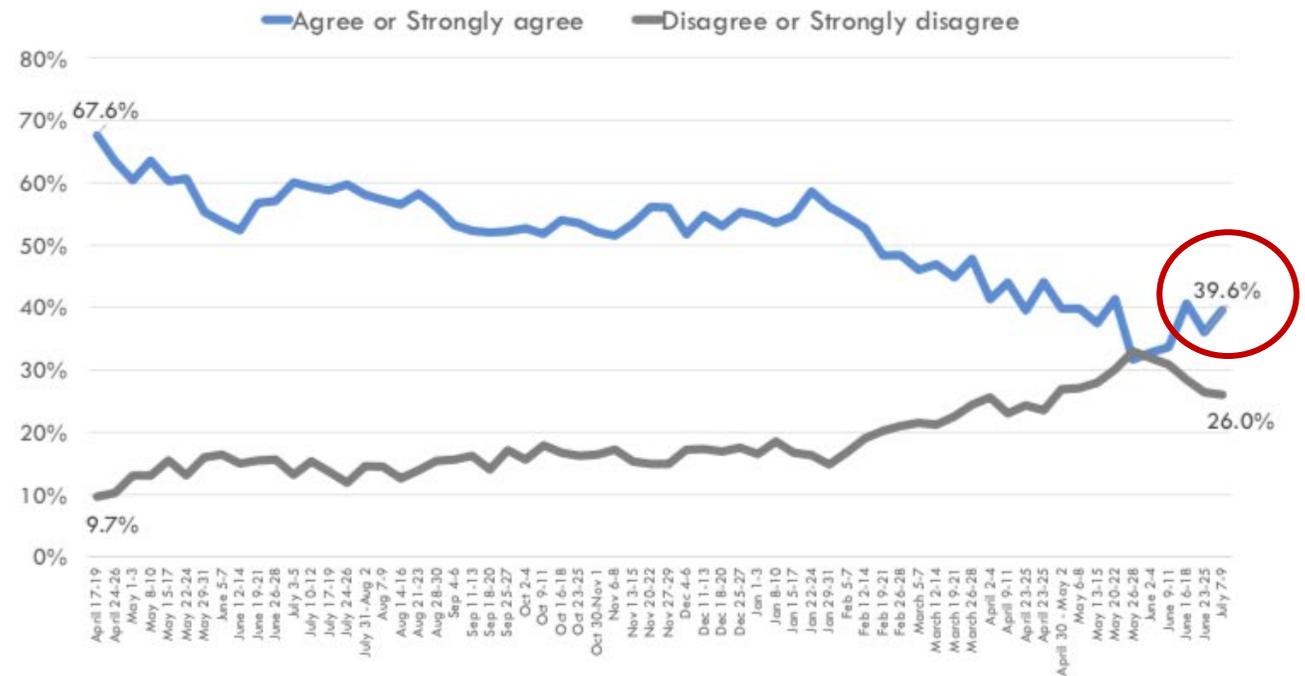
How much do you agree with the following statement?

Statement: I do not want travelers coming to visit my community right now.



(Base: Waves 6-69. All respondents, 1,238, 1,208, 1,204, 1,209, 1,212, 1,223, 1,257, 1,214, 1,214, 1,205, 1,231, 1,365, 1,213, 1,209, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,209, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209, 1,204, 1,208, 1,202, 1,206, 1,202, 1,210, 1,215, 1,206, 1,205, 1,208, 1,201, 1,215, 1,217, 1,215, 1,200, 1,209 and 1,205 completed surveys.)

Historical data



MCI Market Overview

- MCI Stakeholders - Hawai'i is Open for Group Business
- Strong MCI Business on the books for Q4 21 and Q1 and Q2 22
- MCI Stakeholder interested Group Business Q3 and Q4 2022 and 2023
- MCI Customer Sentiment and Concerns
 - Changing Government Mandates related to COVID
 - Liability and Risks in booking future meetings
 - Industry Staffing Issues/Loss of Hotel Sales Contact

Mālama Hawai'i Program Update



Mālama Hawai‘i Partners

- 100+ partners... and counting
 - Listed on gohawaii.com/malama
- New volunteer & hotel partners:
 - Pā‘aiu Fishpond
 - Redline Rafting Co.
 - Haiku House
 - Camp Olowalu
 - International Market Place

— MĀLAMA —
HAWAI‘I

TAKE A TRIP THAT GIVES BACK

SCROLL TO CONTINUE

The most rewarding trip is one that gives back

The Hawaiian Islands itinerary that can change your life isn't found in any guidebooks. Because what makes the Hawaiian Islands truly special is not only our stunning natural beauty or our vibrant culture - it's the deeply rooted relationship that connects them.

That relationship between people and place grows stronger every time you *malama* (give back). When you give back - to the land, the ocean, the wildlife, the forest, the fishpond, the community - you're part of a virtuous circle that enriches everything and everyone. Including your experience as a visitor.

And there's never been a more rewarding time to give back. Because our participating partners on every island are collaborating with local non-profit organizations to create amazing offers for you to *malama*. Find your Malama Hawaii experience below.



Aquaculture

Noelani Lee

Visitors restoring traditional native Hawaiian masterworks discover the secret to healing a community - and themselves.

[MORE >](#)



Habitat Stewardship

Kiai Collier

Volunteers leave a positive impact that lasts generations by protecting fragile habitats extending from the mountain to the ocean.

[MORE >](#)



Reforestation

Sam Ohu Gon III

Hikers are led deep into a special realm - where species found nowhere else still reign - to conserve native ecosystems and the vibrant culture they sustain.

[MORE >](#)

Find Your Malama Hawaii Experience

Industry partners and community organizations are offering unique volunteer opportunities ranging from reforestation projects and tree planting to self-directed beach clean-ups and Hawaiian quilting sessions. By booking a Malama Hawaii package and participating in the hotel's designated volunteer activity, you'll qualify for a special discount or even a free night. Each partner is managing its own promotion, so please check their website for specific details.

Volunteer Opportunities

- [Battleship Missouri Memorial](#)
- [Hawaii Land Trust](#)
- [Hawaiian Legacy Reforestation Initiative](#)
- [International Marketplace](#)
- [Kipuka Olowalu](#)
- [Kualoa Ranch](#)
- [Lahaina Restoration Foundation](#)
- [Maui Cultural Lands](#)
- [Pacific Whale Foundation](#)
- [Redline Rafting Co.](#)
- [Surfrider Foundation - Kauai](#)
- [Sustainable Coastlines Hawaii](#)
- [Travel2Change](#)
- [Uluhoo o Hualalai](#)
- [Waikoloa Dry Forest Initiative](#)

Kauai

- [Hilton Garden Inn Kauai at Wailua Bay](#)
- [The ISO](#)
- [Kaha Lani](#)
- [Grand Hyatt Kauai Resort & Spa](#)
- [Kauai Kailani](#)
- [Kiahuna Plantation & the Beach Bungalows](#)
- [Koa Kea Hotel & Resort](#)
- [Makaheuna](#)
- [Poipu Shores](#)
- [Sheraton Kauai Coconut Beach Resort](#)

Oahu

- [Alohilani Resort Beach Waikiki](#)
- [Bamboo Waikiki Hotel](#)
- [Courtyard Marriott Oahu North Shore](#)
- [Embassy Suites by Hilton Oahu Kapolei](#)
- [Embassy Suites Waikiki Beach Walk](#)
- [Hyatt Centric Waikiki Beach](#)
- [Hyatt Regency Waikiki Resort Spa](#)
- [The Imperial Hawaii Resort](#)
- [The Kahala Hotel & Resort](#)
- [The Laylow, Autograph Collection](#)
- [Moana Surfrider, A Westin Resort & Spa](#)
- [Outrigger Waikiki Beach Resort](#)
- [Prince Waikiki](#)
- [Residence Inn by Marriott Oahu Kapolei](#)
- [The Ritz-Carlton Residences, Waikiki Beach](#)
- [The Royal Hawaiian](#)
- [Sheraton Princess Kaiulani](#)
- [Sheraton Waikiki](#)
- [Waikiki Beach Marriott Resort & Spa](#)
- [Waikiki Beachcomber by Outrigger](#)
- [Waikiki Grand](#)
- [Waikiki Malla by Outrigger](#)
- [Waikiki Shore](#)

Maui

- [AC Hotel by Marriott Maui Wailea](#)
- [Andaz Maui at Wailea Resort](#)
- [Camp Olowalu](#)
- [Chase 'N Rainbows](#)
- [Courtyard Maui Kahului Airport](#)
- [Fairmont Kea Lani](#)
- [Four Seasons Resort Maui at Wailea](#)
- [Grand Wailea](#)
- [Haiku House](#)
- [Hana Maui Resort](#)
- [Hyatt Regency Maui Resort & Spa](#)
- [Kaanapali Alii](#)
- [Kamaole Sands](#)
- [Lahaina Shores Beach Resort](#)
- [Makana Surf](#)
- [Paki Maui](#)
- [Polo Beach Club](#)
- [Punoua Beach Estates](#)
- [Residence Inn Maui Wailea](#)
- [The Ritz-Carlton, Kapalua](#)
- [Sheraton Maui Resort & Spa](#)
- [Wailea Beach Villas](#)
- [Wailea Ekahi Village](#)
- [Wailea Elua Village](#)
- [Wailea Ekolu Village](#)
- [Wailea Grand Champions](#)
- [Wailea Beach Resort](#)
- [The Westin Maui Resort & Spa, Kaanapali](#)

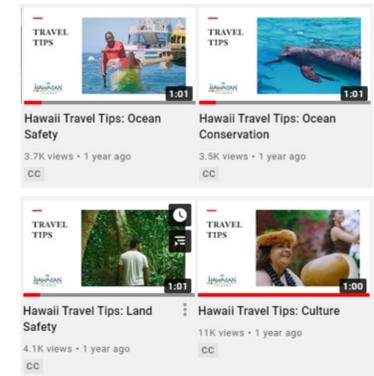
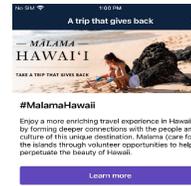
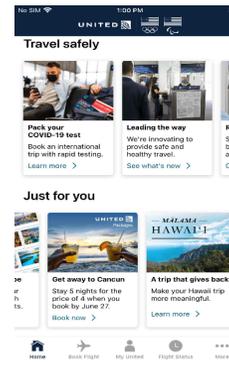
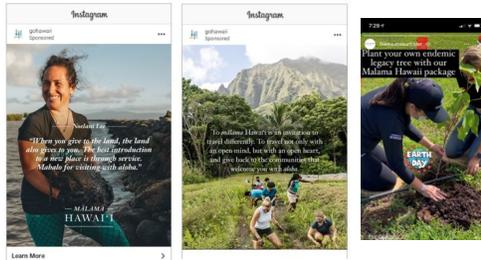
Island of Hawaii

- [Courtyard King Kamehameha's Kona Beach Hotel](#)
- [Fairmont Orchid, Hawaii](#)
- [Hali Kai](#)
- [Hilo Hawaiian Hotel](#)
- [Kanaloa at Kona](#)
- [Kona Reef](#)
- [Mauna Kea Beach Hotel, Autograph Collection](#)
- [Puukoa Ranch](#)
- [Sheraton Kona Resort & Spa at Keauhou Bay](#)
- [Waikoloa Beach Marriott Resort & Spa](#)
- [Waimea Country Lodge](#)
- [The Westin Hapuna Beach Resort](#)

Mālama Hawai'i Campaign Update



Communication Delivery



Pre - Destination Decision

- Advertising
- Social Media
- Public Relations
- Website
- Enewsletters

Booking

- Websites
- Mobile Apps
- Res Confirmation Emails

En Route/Arrival

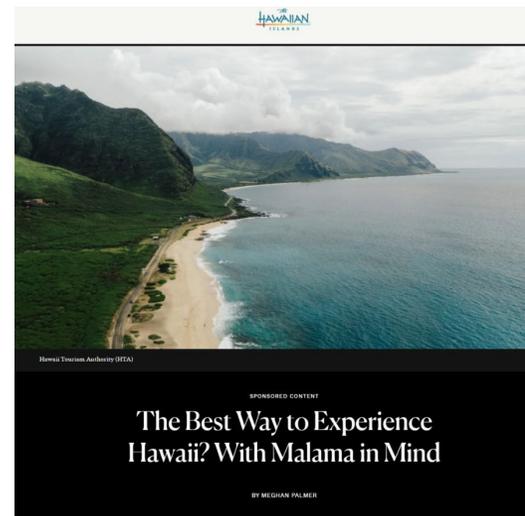
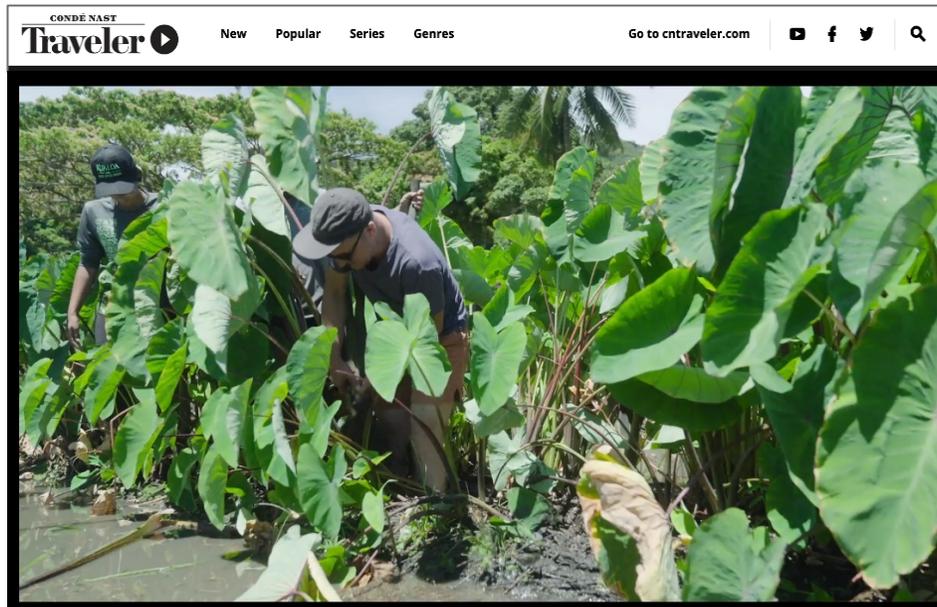
- Airline Apps
- Inflight Ent. Systems
- Airports/Baggage Claim

On Island

- Social media
- Hotel In-room
- Mobile Apps

Mālama Hawai‘i | Communication Touch Points

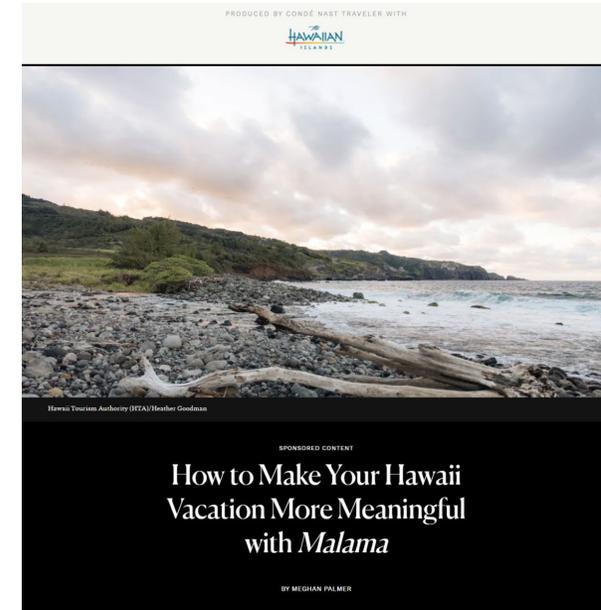
Pre-Destination Decision



To visit Hawaii is to be taken by its natural beauty. Every year, millions of travelers flock to the islands to experience a slice of paradise, marveling in the crystalline waters of the vast ocean, the generous greenery that encapsulates the forests, and the prodigious expanse of mountains that humble and inspire. Being in such close proximity to nature's wonder is a recipe for nirvana, but visitors are equally taken by the richness of native culture that is apparent from the moment you step off of the plane. Essential to Hawaiian culture is the belief that a deep, familial connection exists among all living things—particularly, between the people and aina, the land.



Hawaii Tourism Authority (HTA) | Heather Goodness



In Hawaii, to malama means to “care for” (option to link to article 1). With a land as naturally magnificent as the Hawaiian islands, it’s no wonder caring for the aina—the land—has always been a staple of native culture. What makes Hawaii so unforgettable is the interconnected relationships between the people and the land, and repeat visitors to the islands understand that the most memorable trip to Hawaii isn’t found in a guidebook or a perfectly planned itinerary. Instead, it is found in malama, giving back to the land in order to travel deeper and to garner a lasting understanding of what it means to care for the Earth.



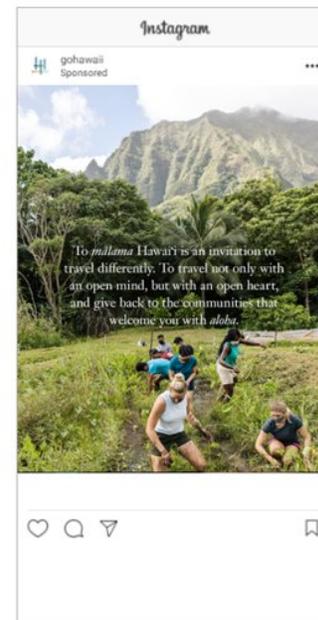
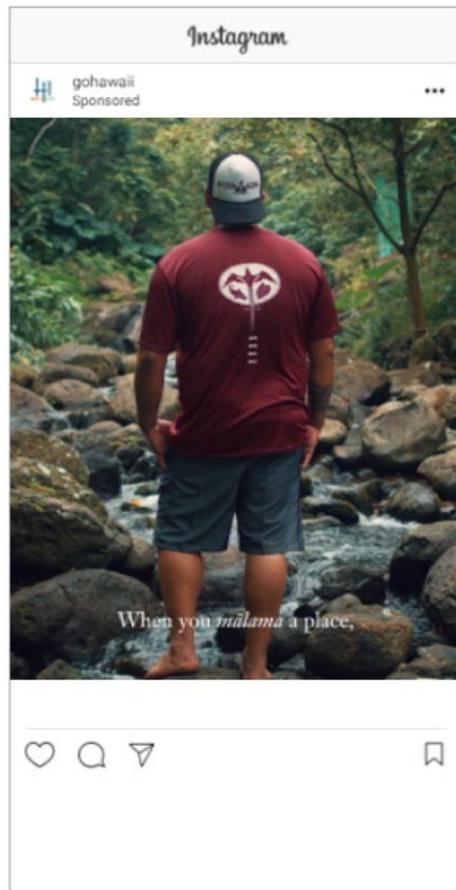
Hawaii Tourism Authority (HTA) | Heather Goodness

With Malama Hawaii, visitors can participate in a number of activities that give back during their visit while taking advantage of incredible offers from hospitality partners around Hawaii’s six main islands. Whether you’re visiting Kauai or Maui or Oahu, here are a few of our favorite ways to make your trip more meaningful with malama.

Conde Nast
Mālama Hawai'i
Native Video

Mālama Hawai‘i | Communication Touch Points

Pre-Destination Decision | Social Media



Mālama Hawai‘i | Communication Touch Points Pre-Destination Decision | Social Media



United Airlines Instagram Stories Takeover

Mālama Hawai‘i | Communication Touch Points Pre-Destination Decision | Earned Media

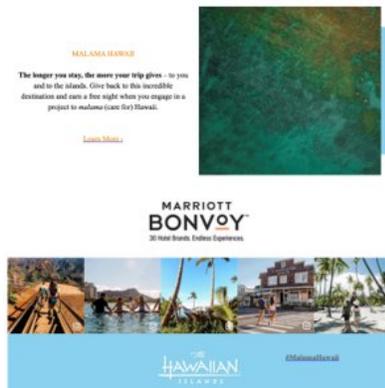


Firsthand Media Experiences Continue

- **Chaney Kwak**, *Hemispheres*
- **Jeanne Cooper**, *SFGate*
- **Leila Najafi**, *Today.com, Thrillist*
- **Kim Westerman**, *Forbes*
- **Michele Bigley**, *SFGate, Toronto Star*
- **PBS' "Fly Brother with Ernest White II"**

Mālama Hawai‘i | Communication Touch Points

Pre-Destination Decision | Earned Media



Mālama Hawai‘i | Communication Touch Points Pre-Destination Decision | Earned Media

Forbes

Jun 19, 2021, 01:30pm EDT | 1,565 Views

Go Back, Give Back: Hawai‘i’s Mālama Program Rewards Visitors For Traveling Responsibly



Kim Westerman Senior Contributor

Travel

Luxury and family travel, food destinations, wine and coffee trends.

Follow

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f As the world opens up again, travelers seem to be flocking to the Hawaiian Islands, one of the safest places to visit right now. It’s no small feat to re-open hotels and restaurants safely, as well as to implement a rigorous COVID-19 screening program that ensures the wellbeing of both locals and visitors. So far, the state of Hawai‘i is knocking it out of the park with maintaining the high level of hospitality the islands are known for while making sure everyone stays safe.





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LIFESTYLE

Malama Hawaii: A new travel program for tourists to give back

Visitors who book a Malama Hawaii package can earn a free hotel night or other special discount in return.



Mālama Hawai‘i | Communication Touch Points

Pre-Destination Decision | Earned Media



The Hawaii Tourism Authority, teaming up with local partners, is launching programs so you can *mālama* (protect and preserve). So slow down, indulge, and give in—and also give back to this remarkable place.

Mālama Hawai‘i | Communication Touch Points Pre-Destination Decision | Earned Media

Travel // Hawaii

'The best thing we've ever done in Hawaii': What it means to travel responsibly in the Aloha State

Michele Bigley

July 17, 2021 | Updated: July 17, 2021 12:34 p.m.



Malama Hawaii

To offset the damaging effects of travel to Hawaii, the Hawaii Department of Transportation (HTA) created the Malama Hawaii program. Malama means to take care of, and the program is statewide, including the locally-owned Waikiki Shore, offering visitors the opportunity to participate in the program. Visitors can plant trees like pineapples, volunteer for beach clean ups, restoration, or conservation projects.

To make this a regenerative trip, we had to do more than just visit. So we signed up for a volunteer project to help rebuild one of the ancient fishponds, Loko Ia Pa'alaau. About 500 years ago, there were many active fishponds, which were the ancient way of going to the ocean. Today, only three are still active in the area, and this one is the last wall.

For the past six years, a jolly woman who everyone calls Auntie Kehau has stewarded this space. Dozens of people, young and old, have flocked here to help her vision come to life. Her eyes lit up as we entered the chain-linked enclosure. She threw back her long salt and pepper hair, hugged us close, thanked us for showing up, and then invited the young college student/conservationist, Robert, to offer a chant. "We always ask permission to enter the space," she explained as Robert spread his broad shoulders and lifted his deep voice toward the kiawe tree above. Sun sparkled over the pond. An egret stalked the mudflats. The bay smiled in the distance.

As Robert demonstrated how to properly yank the root, I was concerned that Nikko wouldn't want to do the work. But he put on his gloves and was the first to jump into the mud, screaming, "Look at this," whenever he extracted an intact root. Once the wheelbarrow was full of pickleweed, he volunteered to cart it to the compost pile. His excitement was infectious and soon, volunteers began chatting easily. We "talked story" about other conservation projects we were involved in and learned how to score doughnuts from Leonard's Bakery without the epic line. Time passed quickly under the hot sun, and soon, Auntie Kehau invited us for lunch.

Getting fed poi, katsu, fresh mango, and taro bread sandwiches surely was a perk, but Nikko expressed it well when he said, "This was the best thing we've ever done in Hawaii, as good as snorkeling." When I asked why, he said that he liked working as a team, and seeing an immediate result. "And the food was good," he added, taking a bite out of the pineapple.

the sand here felt so weird, I explained that it's drugged up offshore and carted in for human comfort. "Oahu's people have spent a ton of time and money trying to make us comfortable," I said.

He looked up from his mochi donut and said, "Next time, we should volunteer at the fishpond twice."

Aloha means to show love. And in all relationships, you must first give something to then receive. Walking into this space with my kid, offering our bodies to do necessary work this community needs to sustain itself, not simply waiting in here and telling them what to do, or how to do it, allowed us to experience aloha in an entirely new way.

one of the only Hawaiian hotels in Waikiki, Kaimana Beach Hotel. The hotel is undergoing a renovation with new ownership — the project is being managed by the Henderson family, owned and operated by Oahu chef Chris Henderson, who has made the hotel a family destination by Surf Rider.

On the island, Nikko and I went to the beach. When he asked why

"Nikko expressed it well when he said, 'This was the best thing we've ever done in Hawai'i, as good as snorkeling.' When I asked why, he said, that he liked working as a team, and seeing an immediate result."

Mālama Hawai‘i | Communication Touch Points Pre-Destination Decision | Earned Media

HOW TO GIVE BACK

Mālama Hawaii encourages visitors to care for the land through activities that bring you up close and personal to Maui's nature and culture. Maui Cultural Lands gathers locals and visitors each Saturday to clear undergrowth in Honokowai Valley. You can also pick up plastic waste and fishing nets that threaten

marine life through the Pacific Whale Foundation's beach clean-up outings. At the Lahaina Restoration Foundation, meanwhile, you'll get a hands-on lesson on priceless artifacts from Hawaii's diverse history at the same time you're helping record them for posterity. gohawaii.com/malama



MAUI, IN YOUR POCKET

Why not save all the must-go places in this Maui Three Perfect Days to Urbanisier? Urbanisier is a new app for collecting, organizing, and sharing all the places you need and love in any city in the world—in fact, any place you like. This way, rather than keeping endless notes, screenshots, and links, you have all your favorites in one place, and always in your pocket!

The Maui venues featured here have been neatly collected for you to download and keep forever on the free Urbanisier app. Just scan our QR code.



This page a chef finishes dishes at the Andaz Maui at Wailea Resort. Opposite page: From top to bottom: The Andaz Maui at Wailea Resort.

sword. "Now that we saw Maui with so few people, we can't go back to what tourists used to be like. We need to meet someone in the middle. We want to welcome travelers, but we also need to educate them that we have limited resources." For Simon, this means using more island ingredients, such as breadfruit. In any given week, he goes through about 80 pounds of this "cane plant," one of the original species brought by the Polynesians, in order to make his macaroni salad unique.

With my box of spicy kagit (maifin) poke on cold noodles, I'm finally ready for the island's most recognized icon. Sure, every tourist's heard of Halekālā. So what? Sometimes, a favorite warrants its

"Strike what I said about this being a daily indulgence; I could eat shave ice every hour."



place on the podium. It takes two hours, give or take, to travel the hairpin highway that's just short of 40 miles, transporting me from sea level to above 10,000 feet. This is the first time I'm donning anything other than flip-flops and shorts since touching down. The man's still strong, but so are the gusts pummeling me the moment I step out of my car near the summit. Sunrises here are so popular that entering the park before 7 a.m. requires an impossible-to-get ticket, reserved months in advance. This afternoon,

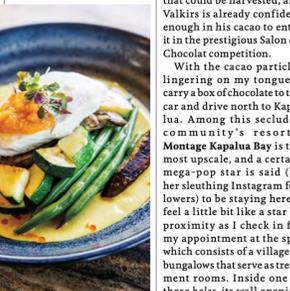
though, the 11-mile Keenehe'e Trail is empty. I descend toward the crater, silver-snows shimmer alongside. By the time I return to the visitor center, the sun is just about burrowing into the blanket of clouds below. The oldest exposed lava here is said to be more than a million years old. I know the island of Maui will survive, with or without the tourists. If this trip has taught me anything, it's that slowing down and learning to mālama is the only way for us to be around to witness this beauty for years to come.

Chaney Kwak is the author of *The Passenger*, out now from Godwin.

Maui Magic: Instagram-worthy island life is closer than you think. Fly to Maui nonstop from Chicago, Denver, Los Angeles, Newark, New York, and San Francisco. Book at united.com/maui.



Clockwise from above: Ukulele lessons at the Montage Kapalua Bay; the Montage's spa; local produce in a dish at Banyan Tree at The Ritz-Carlton Kapalua



to the lush foliage outside, a masseur named Bo gives me what might be the best massage of my life. Lomilomi, a Hawaiian technique, makes use of long, firm, wave-like strokes, and Bo kneads me

"I've never been spiritual, but this moment is about the closest I'll get to a religious epiphany."

until I'm convinced I'm floating on the sea. My legs are soft like dough, and it takes a few minutes to get my bearings as I head out for a hike on the Kapalua Coastal Trail, which traces

the ocean's edge. Past the daredevil cliff jumpers plunging into Namalu Bay, I reach a field of lava rocks that jut out to greet fluffy clouds and grand waves. The white sky parrots, and the sun casts a dramatic spotlight on the water. I've never been spiritual, but this moment is about the closest I'll get to a religious epiphany.

The trail goes right by Banyan Tree at The Ritz-Carlton, Kapalua, so as the sun sets I settle down at a table among the honeymooners and families. The kitchen jazzes up heirloom tomatoes and microgreens from Hua Momona Farm, just up the hill, with buffalo mozzarella and balsamic vinegar. The garlic-glazed ribs melt almost like chocolate in my mouth; pineapple sambal brightens steamed mahimahi in a bath of green curry. God knows how, but I finish every bite.

Mālama Hawai‘i | Communication Touch Points Pre-Destination Decision | Earned Media

SFGATE

How a traditional Hawaiian practice is striking a new note for visitors

Jeanne Cooper
June 26, 2021 | Updated: June 29, 2021 3:28 p.m.



Hapuna Beach at sunrise.
Jeanne Cooper/Special to SFGATE

Clop-clop-clap, clop-clop-clap ... clap twice with cupped hands, once with flat hands, and repeat. It seems easy enough, but when it's sunrise on Hawaii Island's distractingly gorgeous Hapuna Beach and you're a novice at chanting, it can take a while to get the hang of it.

HOUSTON CHRONICLE

LIFESTYLE // THE PAGE

Visiting Hawaii taught me the art of 'Aloha' is more than a greeting

JEN MURPHY
June 22, 2021 | Updated: June 23, 2021 3:38 p.m.



The Hawaii Tourism Authority recently launched a statewide program called Malama Hawaii. In the Hawaiian language, malama means “to care for” or “preserve.” The initiative aims to care for the land and preserve the culture by educating travelers through “voluntourism” opportunities. In return, program partners, such as the Four Seasons Resort Maui at Wailea and the Outrigger Waikiki Beach Resort on Oahu, reward participants with free nights and resort credits. I have hiked the Pu‘u Ohia Trail near Honolulu countless times, but when I sign up for a reforestation program through Malama Hawaii, the experience transformed into something more enriching.

Mālama Hawai‘i | Communication Touch Points

Pre-Destination Decision | Earned Media



How Destinations Are Creating New Wellness Experiences for Guests

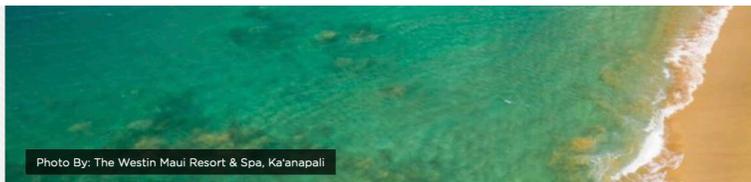


Photo By: The Westin Maui Resort & Spa, Ka'anapali

3 / 11

Self Care Through Voluntourism at a Maui Resort

Research has shown that volunteerism can have positive effects on our mental and physical health — in some studies, it has even been associated with reduced mortality — and at [The Westin Maui Resort & Spa, Ka'anapali](#), it's now associated with an extended vacation as well. In partnership with the [Pacific Whale Foundation](#) as part of a statewide initiative to encourage mindful travel, Westin's new [Malama package](#) offers guests the chance to stay a seventh night for free in exchange for their participation in a "voluntourism" activity. Participants pick up a beach cleanup kit with all the materials they need to help beautify the coastline; their service enriches the environment they're enjoying and fosters a lasting and fortifying personal connection with paradise.



Mālama Hawai‘i | Communication Touch Points

Pre-Destination Decision | Earned Media



A mutual respect of values is at the core of this principle, which is why Kam said Hawaii Tourism Authority's 2021-2023 strategy of crafting destination-specific management action plans and the "Malama Hawaii" regenerative tourism campaign and program were on the right track.

"It's a thoughtful, forward-looking approach to destination management that still takes economics into consideration... but not at the expense of quality of life."

A NEW REGENERATIVE TOURISM CAMPAIGN SERIES

Hawaii's tourism board released a new video series this month as part of the "Malama Hawaii" regenerative tourism campaign.

Each clip features a traditional practitioner or conservation leader telling the story of a key aspect of Hawaiian culture, from caring for fish ponds to farming and protecting forests and reefs.

Viewers are invited to come and "Malama" or care for Hawaii by learning about unique ways to connect and restore the destination beyond the tourist tropes.



The regenerative tourism campaign has resonated locally, and tourism marketers are also applauding the effort.

"It's a great start," said Frank Haas, president of Marketing Management, a travel and hospitality marketing consulting firm, and former dean of hospitality at Kapi'olani Community College.

Haas said that it was pushing back against "the curse of a strong brand," and that people have this intense image of Hawaii as beaches and beautiful resorts that is hard to change.

"The campaign strikes a nice balance of education and inspiration through character-driven and community-led storytelling," said Rob Holmes, founder and chief strategist at **CLP Films**, a content marketing agency focused on the travel industry and producing sustainable tourism storytelling campaigns. "That works really well in tourism because it taps into emotions and creates powerful connections."

Holmes said that the tourism board should be commended for engaging stakeholders in the community and giving travelers the tools and inspiration to be part of the solution, while also reframing Hawaii's measure of success by celebrating regeneration and preventing overtourism rather than pushing for more visitors.

Mālama Hawai‘i | Communication Touch Points Pre-Destination Decision | Earned Media



As Vaccine Restrictions Lift, Hawaii Meetings and Incentives Heat Up

By Sue Pelletier - July 14, 2021

To further this aim, Meet Hawaii recently launched a program called **Malama**. "As Hawaii shifts to destination management in post-pandemic world, the Hawaii Visitors & Convention Bureau is encouraging meeting, convention and incentive groups to embrace 'malama' as group meetings return to Hawaii as part of the aloha spirit to give back," he said. To learn more about how to collaborate with local nonprofits and participate in volunteer give-back programs, visit <https://www.gohawaii.com/malama>.

"Hawaii is open. Hawaii is in demand for group meetings and incentives, but there is more of an expectation post-pandemic that meetings and incentives can enhance their experience and also strengthen the local community through Malama," Reyes said.



Hawaii Taking A Different Approach With New Campaign

Posted on June 9, 2021 — No Comments ↓



The Hawaii Tourism Authority (HTA) and the Hawaii Visitors and Convention Bureau (HVCB) want to welcome travellers back to the Hawaiian Islands, but with the emphasis on connecting with the islands' culture, giving back to the destination, and preserving it for the future, while following safe health practices.

That's the message in a series of educational videos being played to visitors before and after they arrive in Hawaii as part of the Malama Hawaii marketing campaign, launched through a partnership between HTA and HVCB.

The campaign targets the mindful traveller – those who respect the culture and environment of the places they visit and seek to explore responsibly, to make meaningful memories through enriching experiences.

It's an approach that's in line with HTA's 2020-2025 Strategic Plan and its four interacting pillars: natural resources, Hawaiian culture, community, and brand management.



INSIGHT ■ HAWAII INSIGHT

Malama Hawaii offers vacations with a purpose

By Tovin Lapan | Jun 07, 2021

🗨️ | A • A-



Mālama Hawai'i | Communication Touch Points Pre-Destination Decision | Earned Media



Hotels, groups team up to malama 'aina

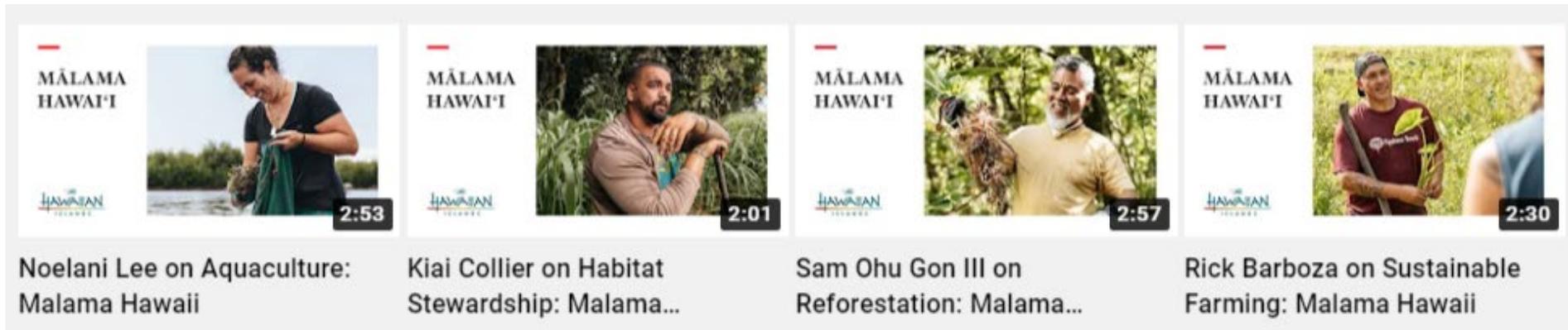
By [Stephanie Shinno](#) The Garden Island | Thursday, July 1, 2021, 12:05 a.m.

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Mālama Hawai‘i | Communication Touch Points

Pre-Destination Decision | Video Creative



Full Length Episodes

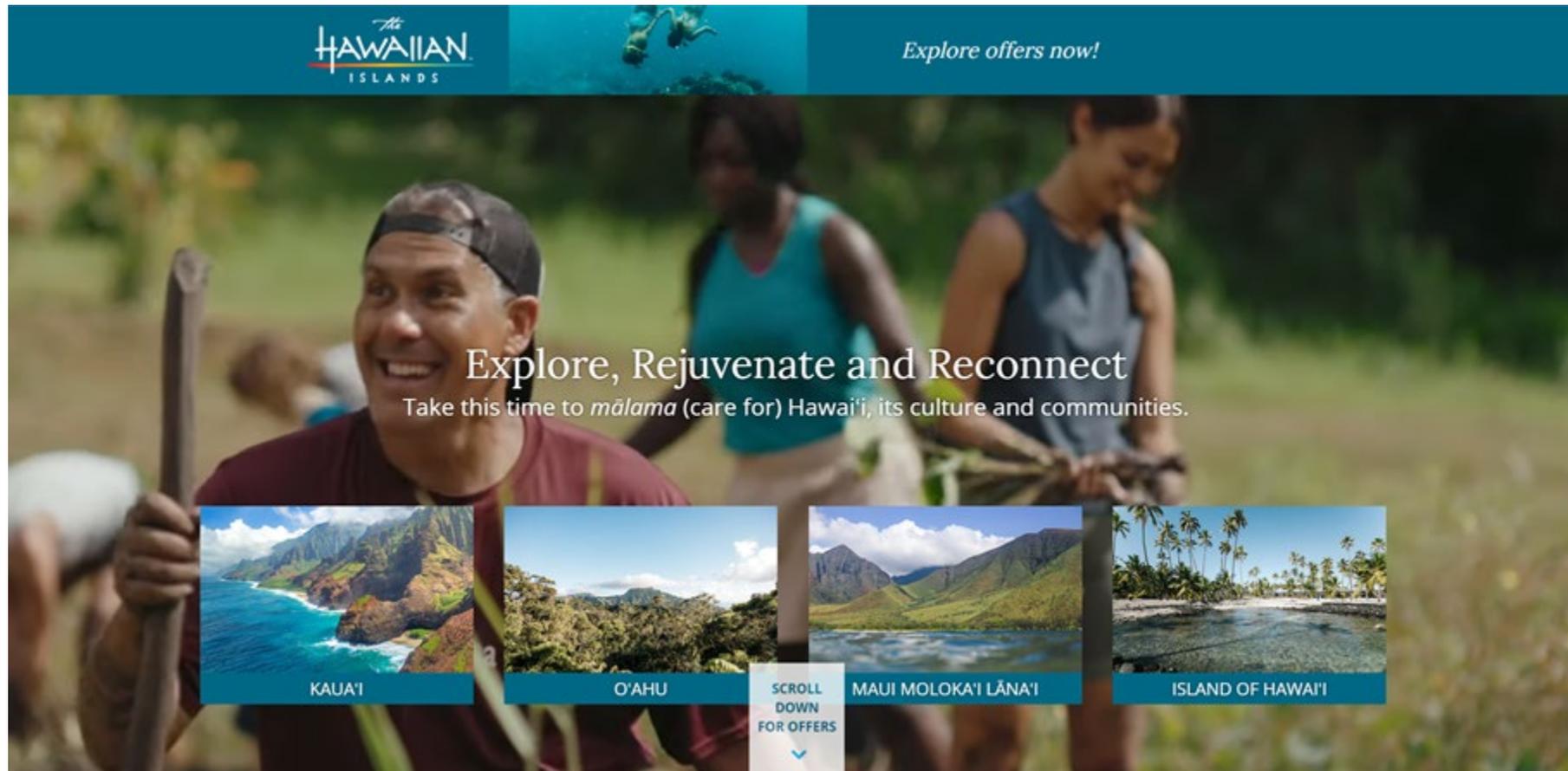
- [Malama Hawaii Playlist](#)
- Episode 1: [Noelani Lee on Aquaculture](#)
- Episode 2: [Kiai Collier on Habitat Stewardship](#)
- Episode 3: [Sam Ohu Gon III on Reforestation](#)
- Episode 4: [Rick Barboza on Sustainable Farming](#)

:30 Commercials

- [Aquaculture](#)
- [Habitat Stewardship](#)
- [Reforestation](#)
- [Sustainable Farming](#)

CTRL + Click to launch videos on YouTube

Mālama Hawai'i | Communication Touch Points Pre-Destination Decision | Co-op Program



The HAWAIIAN ISLANDS

Explore offers now!

Explore, Rejuvenate and Reconnect

Take this time to *mālama* (care for) Hawai'i, its culture and communities.

KAUAI **O'AHU** **MAUI MOLOKA'I LĀNA'I** **ISLAND OF HAWAII**

SCROLL DOWN FOR OFFERS

Mālama Hawai‘i | Communication Touch Points

Booking / En Route / Arrival

Alaska AIRLINES Blog

Coronavirus Travel

Vaccinated travelers no longer need negative COVID test to fly to Hawaii

Alaska Airlines | July 5, 2021

5. Malama when you get there.

Mālama, means "to nurture" or "care for," and is all about preserving the beautiful Hawaiian Islands and taking care of all those who live there. As tourism starts to recover, the islands encourage travelers to be open-minded and respectful of Hawai'i's beauty and leave with a better understanding of what it means to care for the earth, each other and ourselves. [Learn more.](#)

BOOK YOUR TRIP TO HAWAII

Hawaii Travel Tips: Health & Safety

Watch on YouTube

No SIM 1:00 PM

UNITED

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A trip that gives back

Make your Hawaii trip more meaningful.

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A trip that gives back

— MĀLAMA —
HAWAII‘I

TAKE A TRIP THAT GIVES BACK

#MalamaHawaii

Enjoy a more enriching travel experience in Hawaii by forming deeper connections with the people and culture of this unique destination. Malama (care for) the islands through volunteer opportunities to help perpetuate the beauty of Hawaii.

[Learn more](#)

Kuleana | Communication Touch Points In Market

Kuleana Travel Tips Videos

[Kuleana Travel Tips Playlist](#)

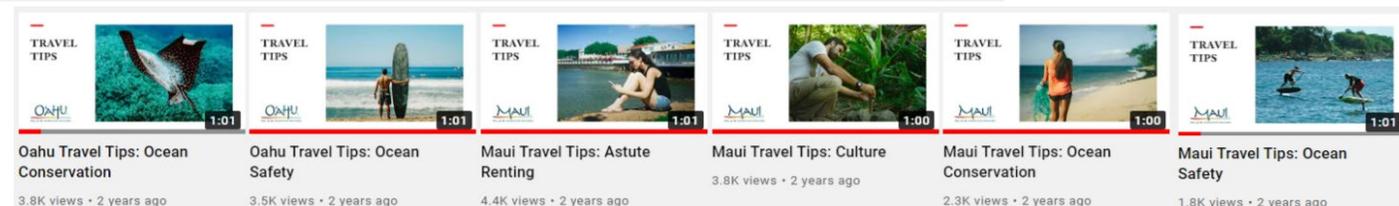
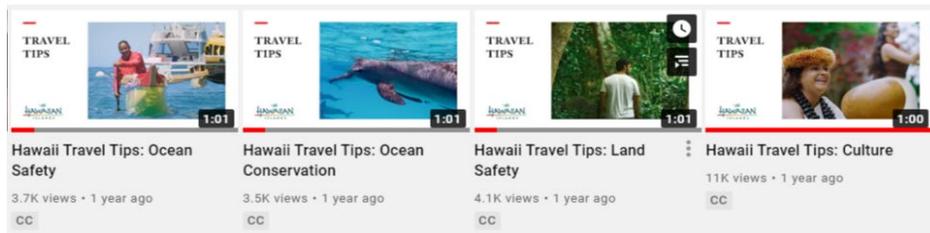
[Travel Tips: Culture](#)

[Travel Tips: Land Safety](#)

[Travel Tips: Ocean Conservation](#)

[Travel Tips: Ocean Safety](#)

CTRL + Click to launch videos on YouTube



MCI Mālama Hawai'i

Meet Hawai'i is working on specific Mālama Hawai'i programs targeted to the Corporate Social Responsibility (CSR) Umbrella.

Corporate Social Responsibility

Hawaii's corporate social responsibility program allows groups an opportunity to donate their time and make Hawaii a better place for all. The bonus for you is that these volunteer projects take place in idyllic tropical settings that need a little assistance. Groups leave Hawaii a better place than they found it, and help improve the environment for those who come in the future.



Preserve Hawaii

Preserve Hawaii is an online resource for finding volunteering opportunities with Hawaii's environmental organizations statewide: www.preservehawaii.org.

Find other opportunities for across the state:

- [Oahu](#)
- [Kauai](#)
- [Hawaii Island](#)
- [Maui](#)
- [Molokai](#)

A vertical poster with a light beige background. At the top, the text reads "Plant a KOA TREE AND LEAVE A LASTING LEGACY IN HAWAI'I". Below the text is a photograph of a person's hands holding a small green sapling with dark soil. At the bottom, there is a call to action: "Click, sponsor and reforest at onemillion.legacytrees.org" next to a circular logo for "ONE MILLION LEGACY TREES". To the right is the "HAWAII CONVENTION CENTER" logo with the tagline "Where Business and Aloha Meet".

2021 MCI Key Industry Outreach

Actively involved in business development through attendance at premier Industry Trade Events.

MCI is working with HVCB Membership on “Made in Hawai‘i” Retail Program to connect MCI attendees with the community

Actively collaborating with O‘ahu hotel partners on a unified citywide message and strategy focused on future bookings for 2026 and beyond.

Industry Trade Events

- Corporate Event Marketing Association (CEMA)
- Maritz Global
- Connect 2021
- IMEX America 2021

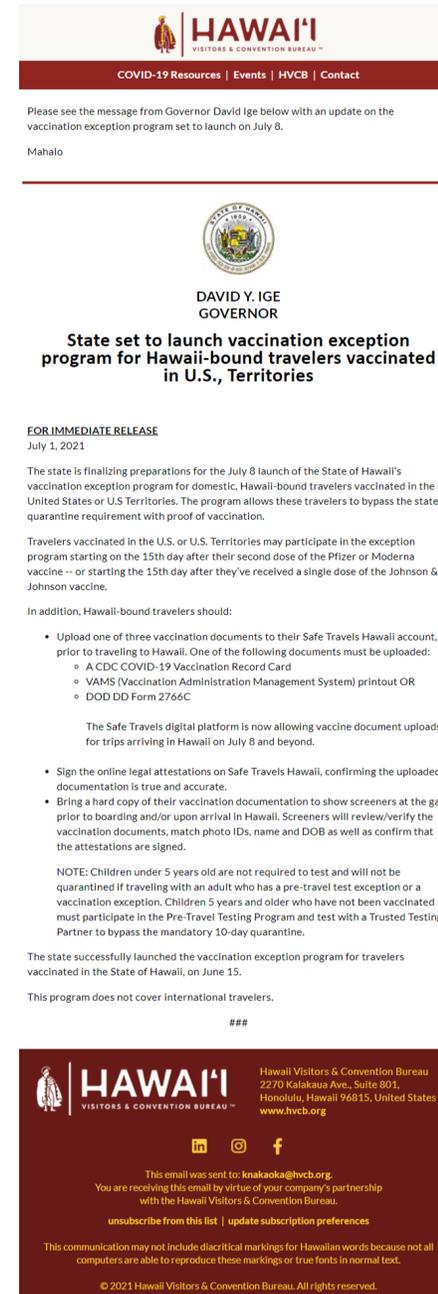


An underwater photograph showing two divers swimming horizontally over a rocky seabed. The water is clear and greenish-blue. In the background, a large, rugged rock formation rises from the water's surface. The scene is captured from a low angle, emphasizing the depth and clarity of the water.

Vaccination Exception Outreach

Vaccination Exception Outreach Emails

- Targeted Media – 342
- Local PR Industry Partners – 343
- PR Newswire:
 - Release Views and hits – 6,700
 - Total Pickup – 119
- Industry Partners – for use in their communications
 - HVCB membership database – 2,700
 - U.S. travel agents/advisors – 40,000
 - Wholesale and consortia - 26
 - Airlines - 15
 - OTAs - 20



HAWAII
VISITORS & CONVENTION BUREAU™

COVID-19 Resources | Events | HVCB | Contact

Please see the message from Governor David Ige below with an update on the vaccination exception program set to launch on July 8.

Mahalo


DAVID Y. IGE
GOVERNOR

State set to launch vaccination exception program for Hawaii-bound travelers vaccinated in U.S., Territories

FOR IMMEDIATE RELEASE
July 1, 2021

The state is finalizing preparations for the July 8 launch of the State of Hawaii's vaccination exception program for domestic, Hawaii-bound travelers vaccinated in the United States or U.S. Territories. The program allows these travelers to bypass the state's quarantine requirement with proof of vaccination.

Travelers vaccinated in the U.S. or U.S. Territories may participate in the exception program starting on the 15th day after their second dose of the Pfizer or Moderna vaccine – or starting the 15th day after they've received a single dose of the Johnson & Johnson vaccine.

In addition, Hawaii-bound travelers should:

- Upload one of three vaccination documents to their Safe Travels Hawaii account, prior to traveling to Hawaii. One of the following documents must be uploaded:
 - A CDC COVID-19 Vaccination Record Card
 - VAMS (Vaccination Administration Management System) printout OR
 - DOD DD Form 2766C
- Sign the online legal attestations on Safe Travels Hawaii, confirming the uploaded documentation is true and accurate.
- Bring a hard copy of their vaccination documentation to show screeners at the gate prior to boarding and/or upon arrival in Hawaii. Screeners will review/verify the vaccination documents, match photo IDs, name and DOB as well as confirm that the attestations are signed.

NOTE: Children under 5 years old are not required to test and will not be quarantined if traveling with an adult who has a pre-travel test exception or a vaccination exception. Children 5 years and older who have not been vaccinated must participate in the Pre-Travel Testing Program and test with a Trusted Testing Partner to bypass the mandatory 10-day quarantine.

The state successfully launched the vaccination exception program for travelers vaccinated in the State of Hawaii, on June 15.

This program does not cover international travelers.

###

HAWAII
VISITORS & CONVENTION BUREAU™

Hawaii Visitors & Convention Bureau
2270 Kalakaua Ave., Suite 801,
Honolulu, Hawaii 96815, United States
www.hvcb.org



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This communication may not include diacritical markings for Hawaiian words because not all computers are able to reproduce these markings or true fonts in normal text.

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Aloha,

As you know, on July 8, the State of Hawaii began granting quarantine exceptions to travelers on domestic flights (from U.S. states and territories) who uploaded proof of full vaccination (2 Moderna or Pfizer shots or one Johnson & Johnson shot plus 15 days) received within the 50 states and U.S. territories. Unfortunately, there is still confusion, so please stress to your customers that to qualify for this exception, they must do the following prior to departure:

1. Create a Safe Travels Hawaii online account (<https://travel.hawaii.gov>) including their trip information, and
2. Upload the required vaccination documentation to their Safe Travels Hawaii account

Details on the vaccination exception program were updated on July 9, and should be checked regularly at: <https://hawaii-covid19.com/travel/faqs>.

Unfortunately, a large portion of the travelers arriving at Hawaii airports since July 8, expecting the Vaccination Exception are arriving without completing #'s 1 and 2 above. To ease their arrival experience please make sure that in your communications to your clients this requirement is reinforced.

Mahalo,



John Monahan
President and CEO
Hawaii Visitors and Convention Bureau

Basic vaccination exception requirements. See [FAQs](#) for complete information:

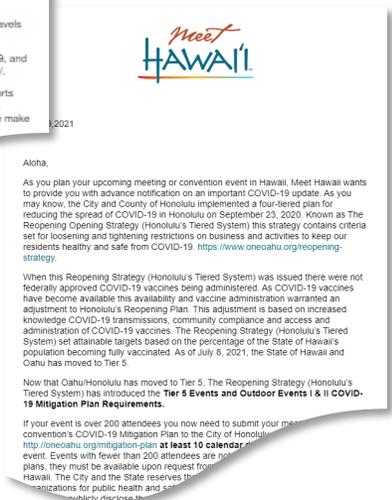
1. **Any traveler who is fully vaccinated against COVID-19 in the United States or U.S. Territories will be eligible for the quarantine exception. This means two shots of Pfizer or Moderna vaccine or one dose of Johnson and Johnson plus 15 days after the last dose.**
2. **Travelers must still create an account in Safe Travels Hawaii, enter their trip details, upload their vaccination documentation, sign the legal attestations, and within 24 hours of departing to Hawaii, complete the online health questionnaire.**
3. **Travelers will need one of the following vaccination records as proof of vaccination:**
 1. A CDC COVID-19 Vaccination Record Card (preferred)
 2. VAMS (Vaccine Administration Management System) printout or certificate
 3. DOD DD Form 2766C
 4. A SMART Health Card with your vaccine record (which can be uploaded via CommonPass) or a vaccine record uploaded to CLEAR Health Pass
 5. Proof of vaccination (source document) provided by a medical provider or authorized COVID-19 vaccination administrator.
4. **The documents listed above must clearly state:**
 1. Traveler's name and date of birth (which must match the name on the traveler's Safe Travels account and their official photo ID).
 2. Vaccine type (i.e., Pfizer, Moderna, Johnson & Johnson)
 3. Date(s) vaccination was administered
 4. Lot number(s) for each shot
 5. Vaccination site or location, which must be within the United States or its territories.

All information must be clear and readable. If a traveler's document is missing information, they should return to the provider to request a completed duplicate CDC COVID-19 Vaccination Record Card or proof of vaccination. Additionally, the traveler can contact their local Department of Health.



MCI Vaccination Exception Outreach Emails

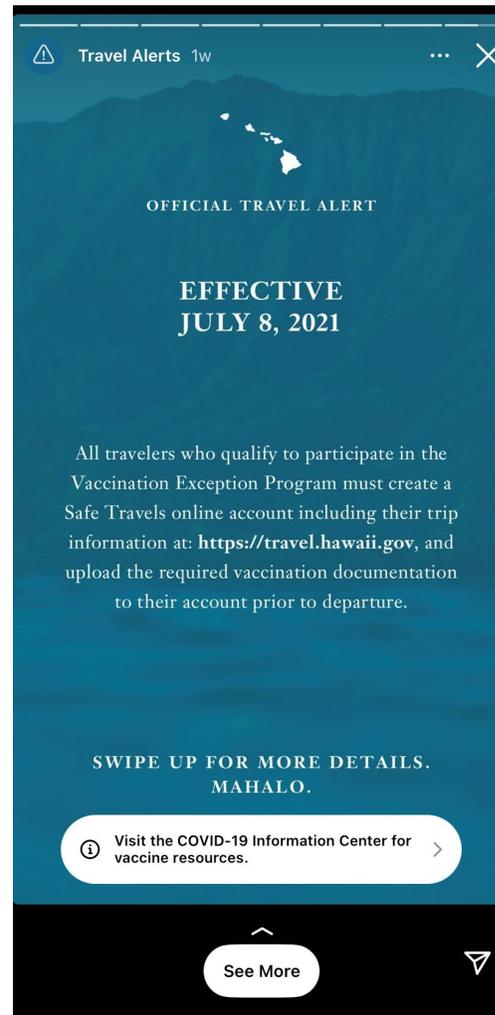
- Program Launch, 7/1/21
 - Targeted MCI clients: 436
- Quick Must-Do Reference List, 7/12/21
 - Targeted MCI clients: 139
- O'ahu Tier 5 Mitigation Plan Update, pending
 - Targeted MCI clients: 144



Vaccination Exception Outreach Social Media

7/2, 7/14/21

-  **Hawaii**  @gohawaii · 7/14/21
1/2 Travel Update: All travelers participating in the Vaccination Exception Program must create a Safe Travels online account including their trip information at: travel.hawaii.gov, and upload the required vaccination documentation to their account prior to departure.
1 comment, 3 retweets, 18 likes
-  **Hawaii**  @gohawaii · 7/14/21
2/2 For more information on how to qualify for the Vaccination Exception Program, please visit: hawaiicovid19.com/travel/faqs/.
3 likes



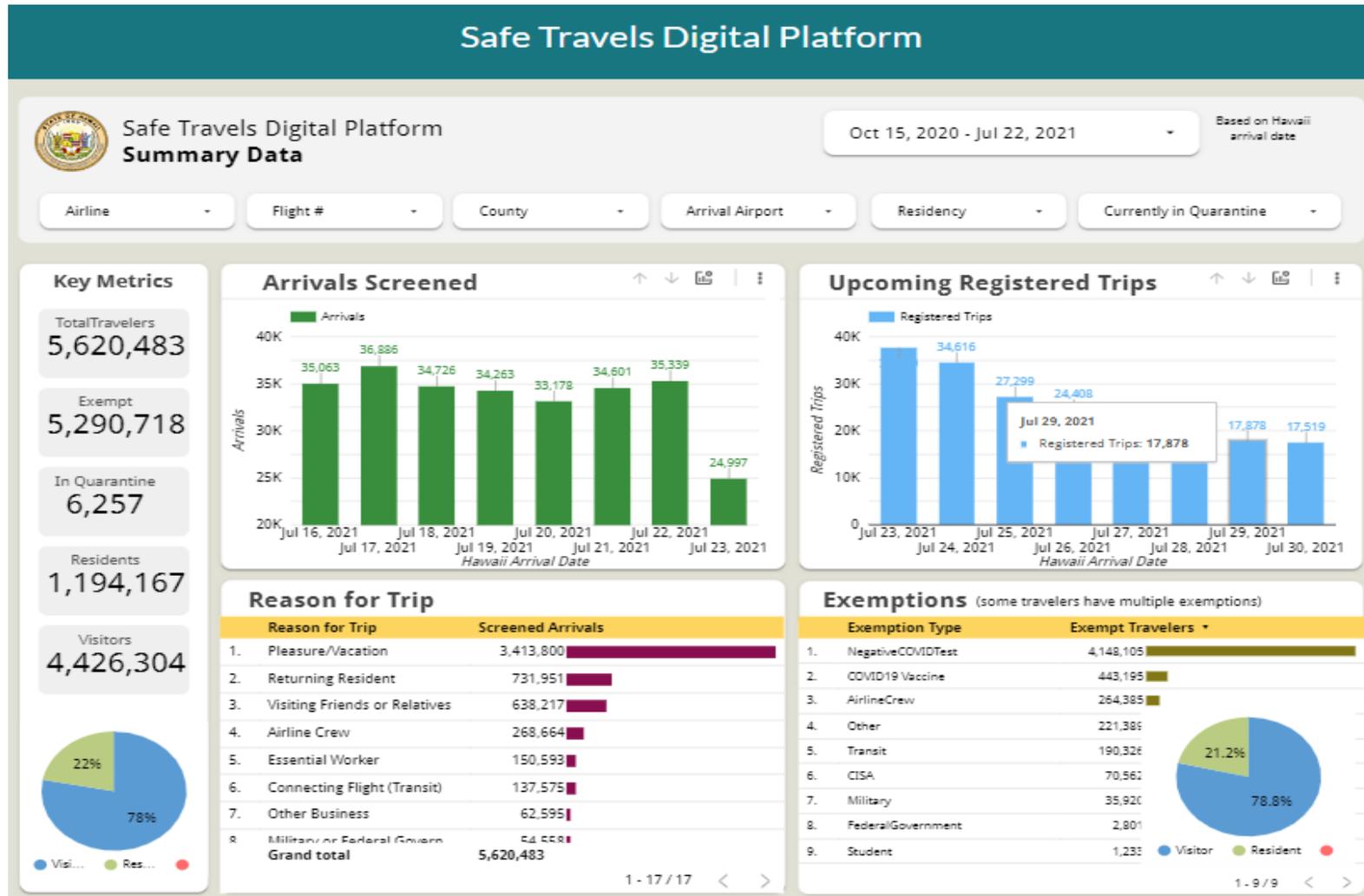
Vaccine Exception Program Announcement

Channels

Facebook, Instagram, Twitter

Safe Travels Digital Platform

October 15, 2020 – July 22, 2021



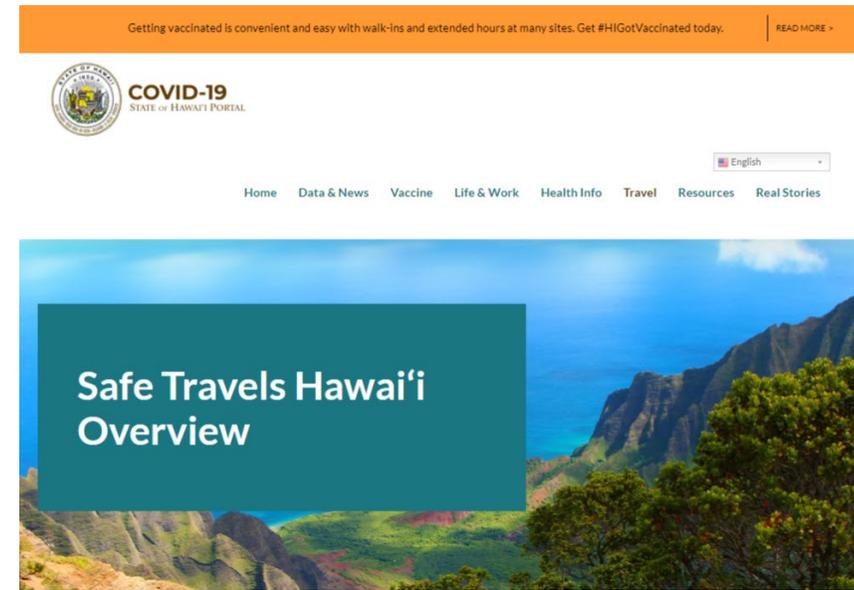
Safe Travels Program Support

HVCB has kept the gohawaii.com COVID-19 alert page up-to-date and contributed regular updates to DOH's hawaiiicovid19.com/travel site.

GoHawaii call center and HVCB staff have answered questions about Safe Travels pre-travel testing and the new vaccination exception.

Since October 15, 2020, the team has handled:

- 225,000+ calls
- 105,000+ emails



State of Hawai'i Safe Travels Hawai'i Program

Aloha! The State of Hawai'i Safe Travels Hawai'i program is designed to prevent the spread of COVID-19 in our community from trans-Pacific passengers arriving at airports/ports across the Islands.

The program includes the required online State of Hawai'i Travel and Health Form, temperature screening at all Hawai'i airports upon arrival, and the mandatory 10-day quarantine with the possibility of a vaccination exception, or a negative pre-travel test to bypass quarantine.

Travelers not participating in Safe Travels MUST quarantine for 10 days or the length of their stay, whichever is shorter.

It is important that travelers consider the duration and considerable expense of possible quarantine before embarking.

Individuals fully vaccinated in the United States or its Territories may enter Hawai'i without pre-travel testing/quarantine starting the 15th day after the completion of their vaccination. **The vaccination record document must be uploaded onto Safe Travels and printed out prior to departure and the traveler must have a hard copy in hand when arriving in Hawai'i.** The State of Hawai'i will also accept vaccine records that are digitally validated by Digital Health Pass **Partners (CLEAR and CommonPass)**. Travelers who use one of the State's partners to link their digitally validated vaccine records with Safe Travels may enjoy expedited processing at the airport (no secondary visual inspection of paper vaccine records).

Read more about how your U.S. COVID-19 vaccination can help you travel between counties in Hawai'i: [HawaiiCOVID19.com/travel/faqs](https://hawaiiCOVID19.com/travel/faqs).



Mahalo



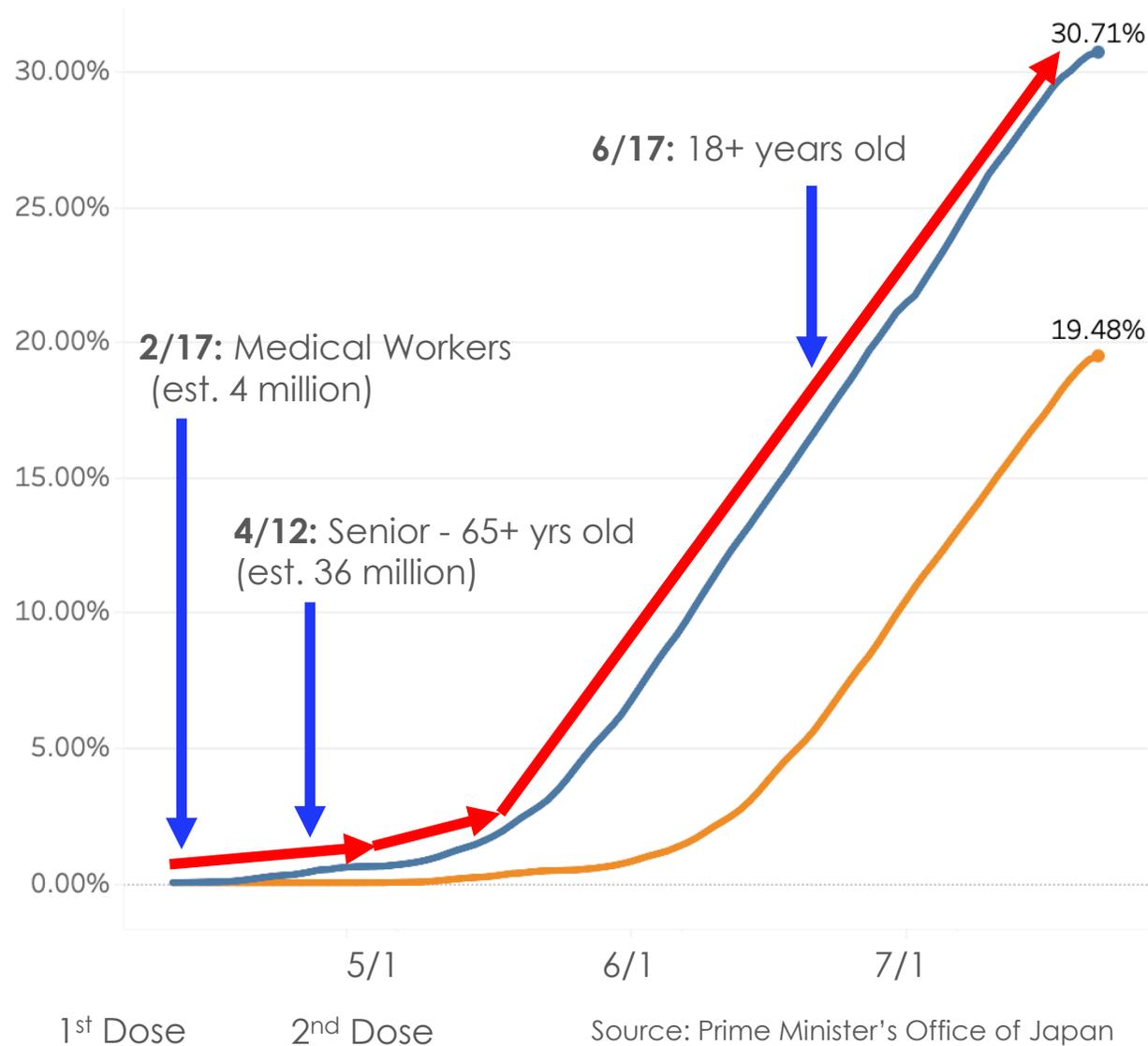
Hawai'i Tourism Authority
Marketing Standing Committee Meeting
Hawai'i Tourism Japan
July 28, 2021

JAPAN

Market Conditions



JAPAN VACCINATION PROGRESS



- State of emergency starts for Tokyo from July 12 to Aug 22. Okinawa extends the state of emergency until Aug 22.
- Japan Government target 80% vaccination (completed) by October
- Olympic (July 23 – August 8) & Paralympic (August 24 – September 5)

2nd doses completed (as of July 23)

U.S.	Hawai'i	Japan
48.9%	59.6%	19.48%

VACCINATION CERTIFICATES

- Start accepting applications for vaccine passports from **July 26** for people who travel internationally
- File applications in the **municipalities**, the certificates will be issued **free of charge**
- **7 countries and regions** (as of 7/21): Italy, Korea, Austria, Turkey, Bulgaria, Poland and Estonia

新型コロナウイルスワクチン接種証明書 Vaccination Certificate of COVID-19

姓(旧姓) / 名(別名)
[Surname(Former Surname) / Given Name(Alternative Given Name)]
患者(土田) / 良子(花子)
[KANJIA(TSUCHIDA) / YOSHIKO(HANAKO)]

生年月日 [Date of birth (YYYY-MM-DD)]
1985-02-19

国籍 [Nationality]:
JAPAN

旅券番号 [Passport Number]:
TR123456



1回目 [First Dose]:

ワクチン種類 [Vaccine Type]:
C19-mRNA

メーカー [Manufacturer]:
ファイザー
[Pfizer]

製品名 [Product Name]:
コミナティ
[Cominaty]

製造番号 [Lot number]:
CTMAVXXXX

接種日時 [Vaccination Date]:
2021-05-30

接種国 [Country of vaccination]:
日本
[JAPAN]

2回目 [Second Dose]:

ワクチン種類 [Vaccine Type]:
C19-mRNA

メーカー [Manufacturer]:
ファイザー
[Pfizer]

製品名 [Product Name]:
コミナティ
[Cominaty]

製造番号 [Lot number]:
CTMAVXXXX

接種日時 [Vaccination Date]:
2021-06-25

接種国 [Country of vaccination]:
日本
[JAPAN]

証明書発行機関 [Certificate Issuance Authority]

〇〇県●●市長
[Mayor of ●● City, 〇〇 Prefecture]

日本国厚生労働大臣
[Minister of Health, Labour and Welfare, Government of Japan]

証明書ID [Certificate Identifier]
XXXXXX-XXXXXXXX-XXXXXX

証明書発行日 [Issue Date]
2021-06-21

CURRENT TRAVEL CONDITIONS



All travelers, including returning Japanese nationals are required:



+



14 days quarantine

Submit a proof of a negative PCR Test for all entry into Japan

Japan National Tourism Organization (JNTO) report

- Japanese outbound for June 2021 as 30,600 passengers (-98.0% vs 2019)
- The first half year 2021 (Jan-June) Total 199,000 passenger (-97.9% vs 2019)
- 2021 total oversea travelers forecast under 1 million based on current pace

OLYMPICS STARTED

7/23-9/5 Tokyo Olympic & Paralympic



JATA'S TOURISM RECOVERY ROADMAP

2021

2022

June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
------	------	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----

Vaccination situation

80% of aged 65+
People vaccinated

50% of people
vaccinated

80% of people vaccinated

achieve this effect of herd immunity

Event

7/23-9/5 Tokyo
Olympic &
Paralympic

10/21 Japan's
House of
Representatives
election

12/12
Honolulu
Marathon

2/4-2/20
Beijing
Olympic

International
Travel
(Expected)

7/26
Begin accepting
requests for
Paper based
vaccine passport

Re-open business track

JATA fam

Begin digital health passport

Resuming Cross-Border Travel

MOFA reduces
the alert level

Relaxation/exemption of 14-day
quarantine when returning to Japan

MARKET CONDITIONS ~AIRLIFT (JUNE/JULY)~



2021 June				
Op Airline Name	Flight #	Origin Code	Total Flights	Seats
All Nippon Airway	NH 186	HND	8	1,968
Hawaiian Airlines	HA 822	NRT	13	3,614
Hawaiian Airlines	HA 450	KIX	4	1,112
Japan Airlines	JL 74	HND	9	1,674
			34	8,368

2021 July				
Op Airline Code	Flight #	Origin Code	Total Flights	Seats
All Nippon Airway	NH 186	HND	9	2,214
Hawaiian Airlines	HA 822	NRT	14	3,892
Hawaiian Airlines	HA 450	KIX	5	1,390
Japan Airlines	JL 74	HND	8	1,488
ZIPAIR Tokyo	ZG2	NRT	2	580
Total			38	9,564

Total Flights # by airport

- ❖ Haneda-17
- ❖ Narita-13
- ❖ Kansai-4

7 to 8 flights per week

Total Flights # by airport

- ❖ Haneda- 17
- ❖ Narita-16
- ❖ Kansai-5

7 to 8 flights per week

MARKET CONDITIONS ~AIRLIFT (AUGUST/SEPTEMBER)~



August				
Op Airline Name	Flight #	Origin Code	Total Flights	Seats
All Nippon Airway	NH 186	HND	6	1,476
All Nippon Airway	NH 184	NRT	2	1,040
Hawaiian Airlines	HA 822	NRT	14	3,892
Hawaiian Airlines	HA 450	KIX	4	1,112
Japan Airlines	JL 74	HND	13	2,534
ZIPAIR Tokyo	ZG2	NRT	4	1,160
Total			43	11,214

Total Flights # by airport
 ❖ Haneda-19
 ❖ Narita-20
 ❖ Kansai-4
10 to 11 flights per week

September				
Op Airline Name	Flight #	Origin Code	Total Flights	Seats
All Nippon Airway	NH 186	HND	8	1,968
Hawaiian Airlines	HA 822	NRT	13	3,614
Hawaiian Airlines	HA 450	KIX	5	1,390
Japan Airlines	JL 74	HND	10	2,150
ZIPAIR Tokyo	ZG2	NRT	5	1,450
Total			41	10,572

Total Flights # by airport
 ❖ Haneda-18
 ❖ Narita-18
 ❖ Kansai-5
10 to 11 flights per week

MARKET CONDITIONS ~AIRLINES' INVESTMENT~

244 seats (8 First class & 49 Business)



290 seats (inc. Full-Flat)



JAPAN AIRLINES

- 5 flights of Haneda (departire: 9/3, 10, 17, 21 & 24) will be operating with first-class seating.
- Face Express system service started 7/19 for International travelers.

ZIPAIR
Tokyo

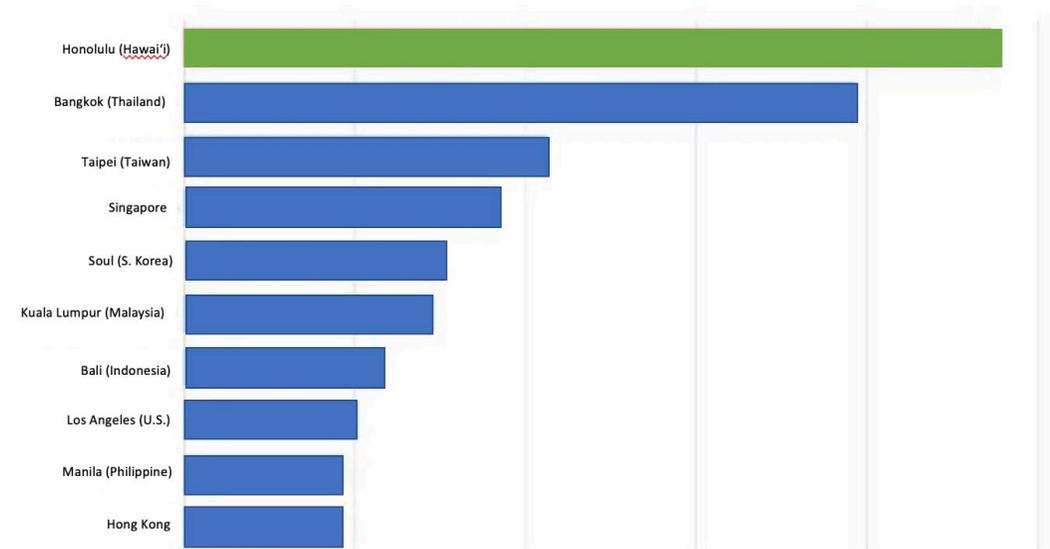
- ZIPAIR increases an additional flight from Narita from October. (Operation: Wednesday & Friday)



- 10,000 Mile back campaign for the passengers of Tokyo (NRT/HND) – Honolulu between 8/1 and 9/30.

CONSUMER SENTIMENT

- **Skyscannar search** between Jan 1 to Jun 30
 - 2019: Honolulu as 6th destination searched
 - 2021: Honolulu as 1st destination searched
- **INFINI DATA Stream** report which gathered big data of Japan travel agencies search indicated Honolulu was the **#1 destination** by far to be searched for December departure period followed by Bangkok, Taipei and Singapore.



TOURISM RECOVER PREPARATION

Aug

- **More Hawai'i Trusted Testing Partners (TTP)**
 - Increase 200-300 TTPs in Japan in Summer (current 84 TTPs)
 - Reduce PCR test cost to \$200 (current \$400)

Sept

- **Accepting Vaccine Passport for Japan visitors to Hawai'i**

Oct

- **Mālama Hawai'i message campaign**



— MĀLAMA —
HAWAII‘I

地球にやさしい旅を

Mālama Hawai'i Microsite

Launched April 22, 2021 (Earth Day)

Mālama Hawai'i

ハワイを想うことは、
ハワイの未来を創ること。

Re-Imagine Hawai'i

美しいハワイを
未来へとつなぐために
わたしたちができること

Embrace Mālama

“マラマ”、思いやりの心でハワイの伝統や文化を受け入れる。

Mālama Hawai'i “マラマハワイ”は、ハワイを思いやる心、レスポンスブルーツリズムのハワイ風スタイルを指します。

マラマとは「ハワイの心」を指す言葉であり、何事でも心から取り組むこと、思いやりを持って行うことを指します。ハワイの伝統や文化を受け入れることは、ハワイの未来を創ることに繋がります。

About Responsible Tourism

責任ある観光によって、観光地を守ろうという考え方。

レスポンスブルーツリズム(責任ある観光)とは、観光客もツーリズムを構成する要素である観光客が意識や行動に責任を持つことで、より良い観光地形成を行っていくという考え方であり、自分の行動が地域や環境へ負荷を与えてしまったりも知れないことを認識し、自然し行動を実践していくことからの観光客の考えです。近年、観光地で起きている環境問題や住民とのトラブル、2019年より始まったSDGsの取り組み、2020年の新型コロナウイルスの影響など、世界の観光産業はレスポンスブルーツリズムの方向へ舵を打つ動きが急激に広がっています。

Responsible Tourism

2009年に入ってから生まれたレスポンスブルーツリズム(責任ある観光)は、観光客の行動や意識の向上を通じて観光地を保護し、観光客も観光客として責任を持って行動することを目指す考え方です。レスポンスブルーツリズムに力を入れるべく、多くの先駆者ももたらした取り組みも数多くあります。このサイトでは、旅行者が実践できることや、企業が取り組むべきことについて紹介しています。

レスポンスブルーツリズムは、旅行者の責任ある行動、観光客も観光客として責任を持って行動することを目指す考え方です。また、マラマハワイの活動やレスポンスブルーツリズムをよりハワイらしく実践するための取り組みも紹介しています。

Aloha + Challenge

SDGsを基準にハワイ州のゴールを設定した特別プログラム

アロハプラスチャレンジは、国連が定める持続可能な開発目標(Sustainable Development Goals: SDGs)を基準として、ハワイの持続可能な自然を達成するために州全体の取り組みとして設定された、地域主導の特別プログラムです。

Be a Pono Traveler

責任ある旅行者へ

Pono(ポノ)とは、ハワイのことばで「善良性、親切心、真心、誠実、正しい、優秀、健康で幸福な状態、繁栄、本質、正義」さんの意味を持ちます。一言で言えば「正しい状態」のことですが、自然環境が、人間関係が、精神状態が、健康状態が、よフランスの、適切なおれた状態を指します。何が正しいとすべきか?アロハプラスチャレンジの目的は、多くの人々がただの意味の深い言葉です。レスポンスブルーツリズムを旅行者は、まさに「Pono Traveler(ポノトラベラー)」というハワイに限らず世界中でポノトラベラーになること。旅行者が本来あるべき正しい家、良い関係性をつくること。そハワイ州観光客の思いであり、使命であると考えています。たレスポンスブルーツリズムを実現する「ポノトラベラー」かもしれません。

ハワイ州観光客からのメッセージ

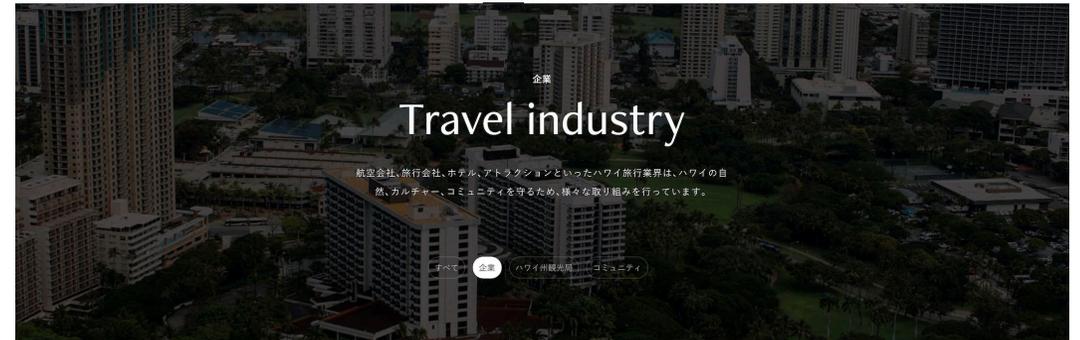
<http://www.allhawaii.jp/MālamaHawai'i>



コミュニティ
Community

ハワイには、自然や文化の保全活動を行うNPO団体やコミュニティが数多くあり、自然や生物の保護活動、教育プログラムの提供、文化を伝える活動や施設など、積極的に活動しています。

すべて 企業 ハワイ州観光局 コミュニティ



企業
Travel industry

航空会社、旅行会社、ホテル、アトラクションといったハワイ旅行業界は、ハワイの自然、カルチャー、コミュニティを守るため、様々な取り組みを行っています。

すべて 企業 ハワイ州観光局 コミュニティ

LATEST

クプ・ハワイ (KUPU Hawaii)



次世代を支援するクプ・ハワイ、Ho'okupu Centerの取り組み

クプ・ハワイは、若年層向けに野外活動を通しての環境保全教育や福祉教育、そして各個人の個性を生かし、誠実さを持って培うために、環境保全などに関わる野外活動を行う様

20210618 < 0

マノア・ヘリテージ・センター (Mānoa Heritage Center)



自然の素晴らしさを次世代に残し伝えたい。マノア・ヘリテージ・センターの取り組みとは？

マノア・ヘリテージ・センターは、ハワイ文化や自然遺産に関する理解度を深める場を提供し、ハワイの遺産の重要性を伝え継承する為に次世代に向けた教育プログラムやワーク

20210618 < 0

サスティナブル・コーストラインズ・ハワイ (Sustainable Coastlines Hawaii)



サスティナブル・コーストラインズ・ハワイが取り組むハワイの海洋環境を学ぶためのAIR Stationとは？

20210603 < 0

イオラニ宮殿 (Iolani Palace)



イオラニ宮殿友の会を記念した Celebrating 55 Years ~55周年を記念して~

20210603 < 0



4月22日はアースデー!! ~アースデーに行われているハワイでの様々な取り組みを見てみよう~

20210423 < 0



サーフライダー・ファウンデーションが取り組む「オーシャン・フレンドリー・レストラン」プログラムとは？

20210421 < 0

ウェット&ワイルド・ハワイ



ウェット&ワイルド・ハワイ、ハワイ初の100%太陽光発電のアトラクションへ

20210512 < 0

マリオット・ザ・ワイキキ・コレクション



マリオット・ザ・ワイキキ・コレクションが取り組む植樹活動

20210418 < 0

クアロア・ランチ・ハワイ



クアロアランチが取り組むサステイナブルな活動

20210417 < 0

biki



地球に優しい新交通バイクシェアサービス“biki”

20210417 < 0

ロバーツハワイ



ロバーツハワイが取り組む海洋生態の調査と電気バスの導入

20210416 < 0

JTBハワイ



JTBハワイの電気バス

20210416 < 0

ジャルバック



ハワイの環境や暮らしを守るためのジャルバックの取り組み

20210415 < 0

ZIPAIR



地球にやさしい機内食

20210415 < 0

ジャルバック



フラ発祥の地ハワイで開催される大会「フラ・ホオラウナ・アロハ」

20210413 < 0

Partner Collaborations & Event PR

地球にやさしい旅を

旅行者の皆さんのアクションが、
ハワイの美しさを保つことに繋がります。



— MĀLAMA —
HAWAII × JCB

マラマハワイ

検索

ハワイ州観光局からのメッセージ



ハワイ州観光局 日本支局長
ミツエ・ヴァーレイ

青い空、青い海、緑豊かな山に恵まれたハワイ。旅行者の皆様と共に共有したい多数の体験やハワイ州観光局は、この美しい自然や伝統文化を次世代へ継承するために、旅行者が楽しむことができるように努めています。ハワイは、旅行者だけでなく、住民にとっても特別な場所です。島々には、豊かな自然や歴史を感じる場所があり、訪れる度に新しい発見があります。旅行者も心でハワイの自然や文化に接していただくことで、魅力溢れるハワイを後世に残していきたい旅行者の皆様が安心して滞在していただくために、安全・衛生面においても徹底した取り組みをお返しを心よりお待ちしております。

ハワイ州の取り組みにつきましては、右記よりご覧ください。
新型コロナウイルス対策についてはこちらで公開しております。

~美しい、大好きなハワイを未来へ~

SUSTAINABLE DEVELOPMENT GOALS

わたしたちは、旅するあなたとハワイに暮らす人々の心のつながりを大切に、SDGsに貢献するサステナブルツーリズムを進めています。

ハワイ州で初となる商業用電気バスを導入

2030年までの国際目標「SDGs」のハブ都市(Local2030 hub)に選ばれたハワイ州は、独自の文化と価値観に基づいた地域主導の目標「アロハプラスチャレンジ」を定め、島々の環境回復と持続可能な未来のための活動を実践しています。

「マラマハワイ」とは、ハワイの島々を思いやる気持ちです。

電気バスについて詳しくはこちら

電気バスの一例

ハワイ州観光局の発信情報に関して詳しくはこちら

LOOK JTB 年末年始 2021年11月1日-2022年1月31日 成田・羽田・関空発

THE NEXT JTBスマートハワイ

新しい旅。もっと快適に、もっと感動を。

「オリオリハワイアプリ」

選べる新しい旅の過ごし方

さらによ質な旅「プレミアム」コース

プライベート空間で楽しむ企画も充実!

新型コロナウイルス感染症対策

ニューノーマル対応商品 THE NEXT

満足が見える旅へ

ハワイ州観光局より

ご自宅でハワイを体感いただける「おうちでハワイ」プログラムや
ハワイの新型コロナウイルス最新情報をご覧ください。

「Malama Hawai'i」では、美しいハワイを未来へつなぐための取り組みを紹介しています。
詳しくはこちらをクリック!

おすすめ情報

安心して快適な旅を

カードのおトクな活用術

もしものときにJCB!

TOPへ




Consumer Event in
Osaka on 7/22 - 25



Hawai'i Tourism Japan Assets Development (in Japanese)



Aquaculture
Noelani Lee



Habitat Stewardship
Kiai Collier



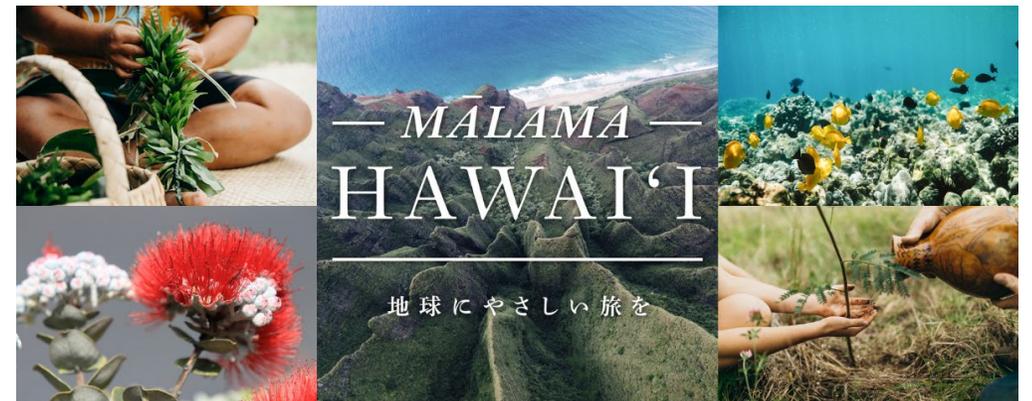
Reforestation
Sam Ohu Gon III



Sustainable Farming
Rick Barboza

— MĀLAMA —
HAWAI'I

地球にやさしい旅を



Hawai'i Tourism Education

Hawai'i
Stakeholders

Airlines

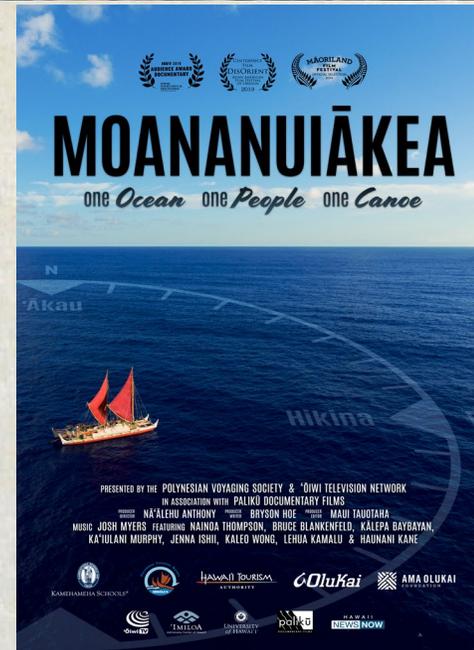
— *MĀLAMA* —
HAWAI'I

地球にやさしい旅を

Wholesalers

HTJ

Mālama Hawai'i - Hōkūle'a Microsite



Mālama Honua
Hōkūle'a
ホクレー号
それは、地球を思いやるハワイの心。
ハワイの誇り、プライド。
先人たちの足跡が通った航海術。
波風を乗り越え、遠くへ。
ふたたび太平洋航海へ。

伝統航海術を通して地球環境を守る

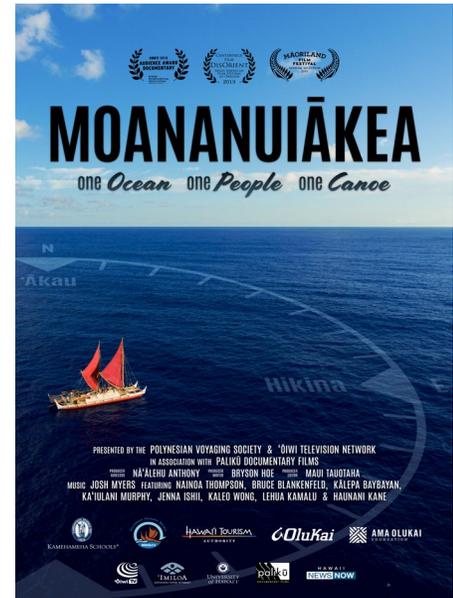
Sister City Relationship

State of Hawai'i	City & County of Honolulu	Hawai'i County	Kaua'i County	Maui County
 5	 7	 6	 4	 3
Fukuoka (1981)	Hiroshima (1959)	Oshima (1962)	Suo-Oshima (1963)	Hachijo (1964)
Okinawa (1985)	Naha (1961)	Nago (1986)	Moriyama (1975)	Miyakojima (1965)
Hiroshima (1997)	Shirahama (2003)	Yurihama(1996)	Ishigaki (1999)	Fukuyama (2008)
Ehime (2003)	Saiki (2004)	Shibukawa(1997)	Iwaki (2011)	
Hokkaido (2017)	Uwajima (2004)	Sumoto (2000)		
	Nagaoka (2012)	Kume Isl.(2011)		
	Chigasaki (2014)			

Hōkūle‘a x Sister city relations

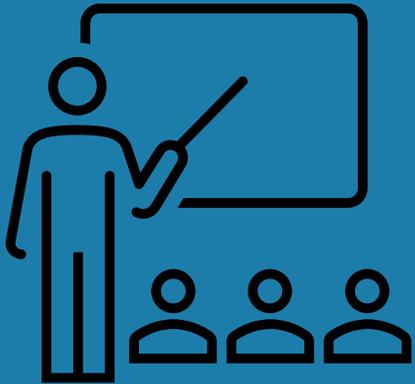


25
Sister cities



MCI Focus

Edu-Tourism



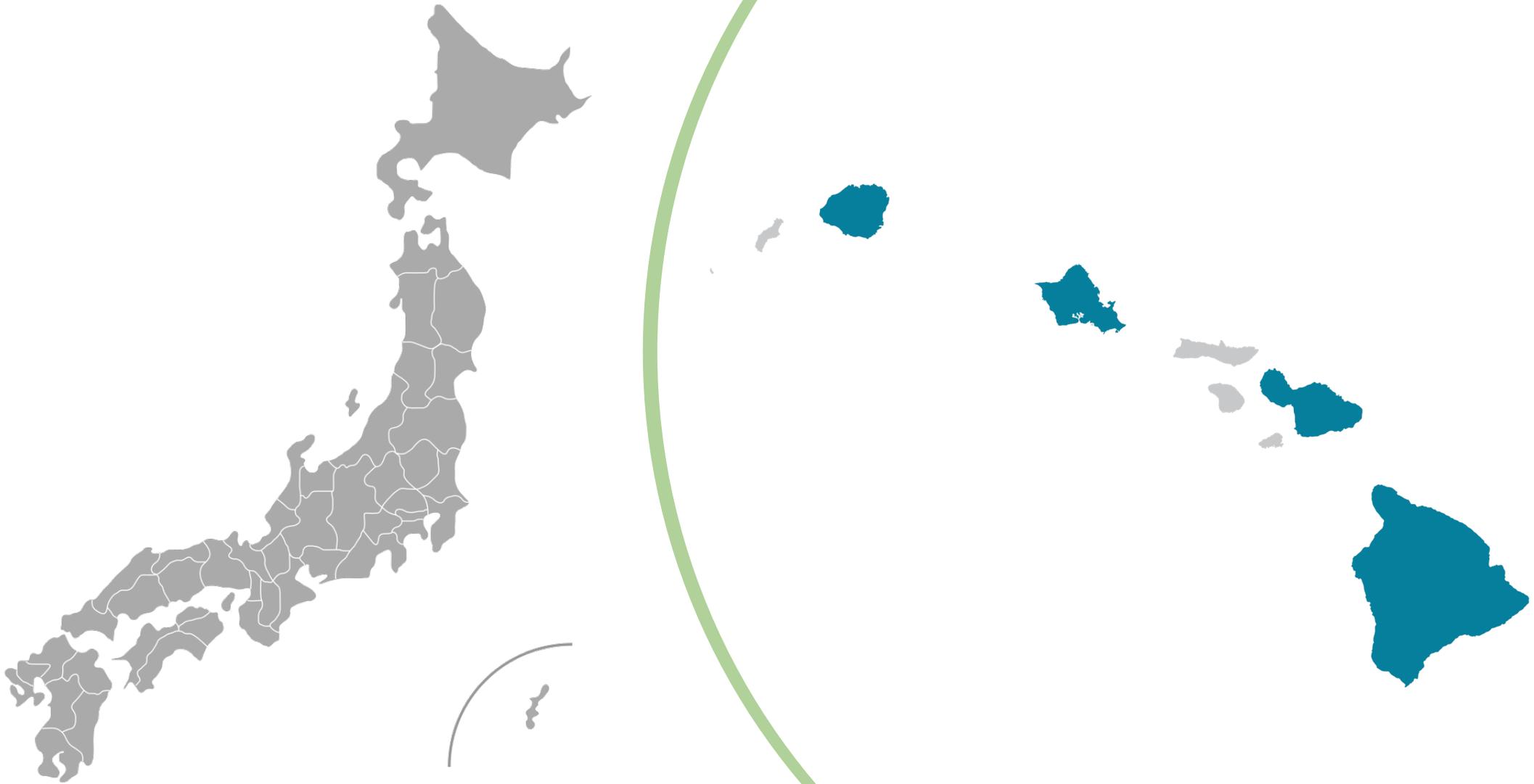
Small Group



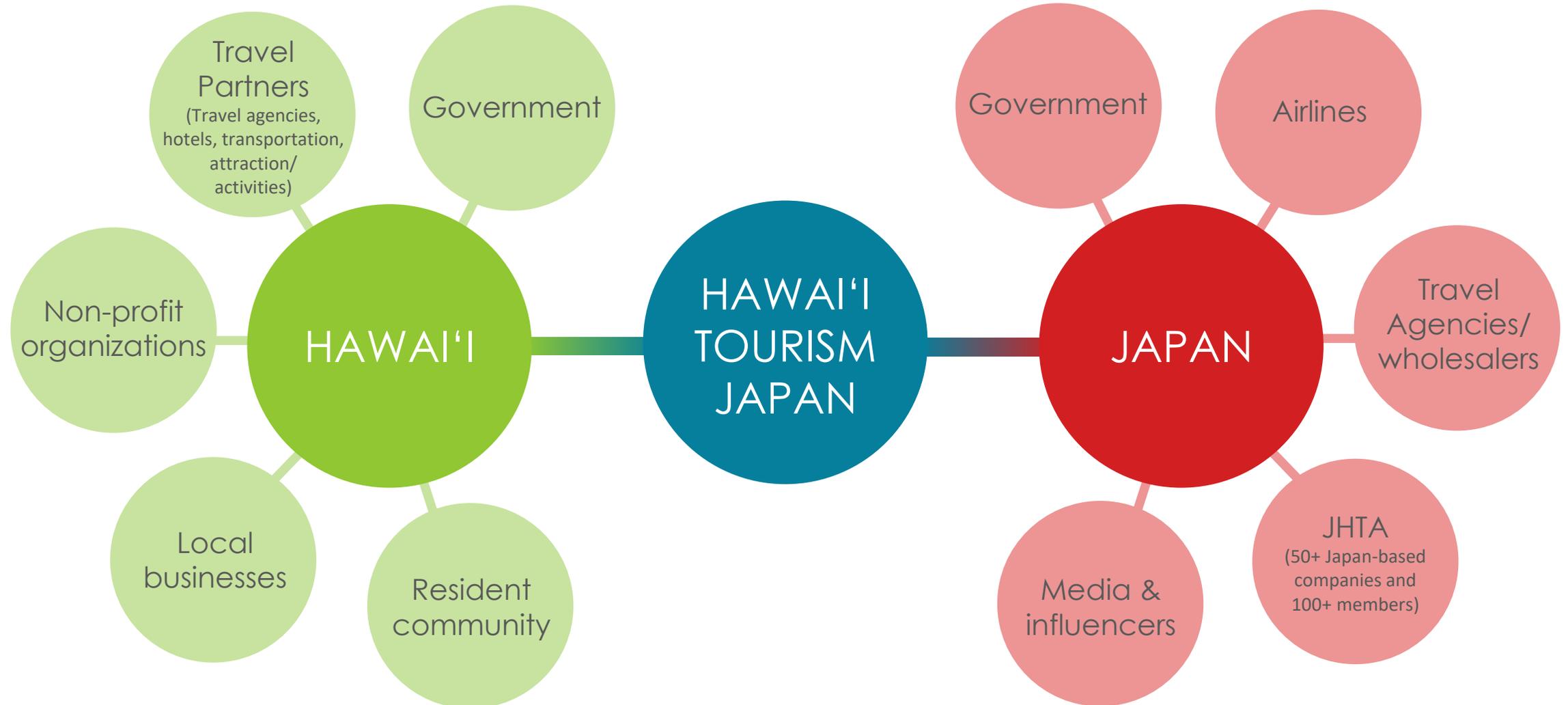
CSR



Hawai'i – Japan Relationship



Industry Collaboration



A close-up photograph of a person's hands pouring water from a brown ceramic pitcher into their cupped hands. The background is a soft-focus field of green grass and small pink flowers. The text is overlaid on the image.

— MĀLAMA —
HAWAII

地球にやさしい旅を

An aerial photograph of a tropical coastline. The foreground shows clear, turquoise water meeting a sandy beach. The background consists of lush, green mountains. A vibrant rainbow arches across the scene, starting from the left side of the frame and ending on the right side, passing over the water and the mountains. The text 'MAHALO NUI LOA' is overlaid in the center of the image in a white, sans-serif font.

MAHALO NUI LOA

11

Presentation, Discussion and Approval of the
O‘ahu Destination Management Action Plan



O'ahu Destination Management Action Plan

O‘ahu ka ‘ōnohi o na kai O‘ahu, the center of the seas

DRAFT

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I. Introduction

Purpose of the Plan

In 2019, the Hawaiian Islands received a record high of 10.4 million visitors. While this brought in \$17.75 billion in total visitor spending to Hawai'i's businesses, \$2.07 billion in taxes generated, and supported 216,000 jobs statewide, it has put pressure on our destinations and communities. This situation is not unique to Hawai'i. Other popular destinations – from Venice, Italy to Machu Picchu, Peru, to Kyoto, Japan – have also felt the negative effects of tourism, which not only impacts residents' quality of life but also the quality of the visitor experience.

In recognition of these challenges, the Hawai'i Tourism Authority (HTA), in partnership with the counties and the respective visitor bureaus, initiated the process of developing community-based Destination Management Action Plans (DMAPs) that aim to **rebuild, redefine and reset** the direction of tourism over a three-year period. The focus is on **stabilization, recovery, and rebuilding of the desired visitor industry for each island**. The actions put forth in the DMAPs are guided by an island-based Steering Committee, that went through a collaborative process which encouraged participation and vital input from the community, visitor industry and other sectors. The DMAPs identify areas of need as well as actionable solutions for enhancing the residents' quality of life and improving the visitor experience across the islands.

HTA's 2020-2025 Strategic Plan is organized around four interacting pillars – Natural Resources, Hawaiian Culture, Community, and Brand Marketing, with more emphasis on addressing tourism impacts and greater destination management. In the plan, HTA defined Destination Management to include:

- attracting and educating responsible visitors;
- advocating for solutions to overcrowded attractions, overtaxed infrastructure, and other tourism-related problems; and
- working with other responsible agencies to improve natural and cultural assets valued by both Hawai'i residents and visitors.

The DMAP initiative is a part of HTA's strategic vision and plan to manage Hawai'i tourism in a responsible and regenerative manner.

The idea of "regenerative tourism" gained momentum in 2020, as the global COVID-19 pandemic has increased awareness of tourism's opportunities and vulnerabilities. What is regenerative tourism? About 15 years ago, the model for "sustainable tourism" was instituted, built on tourism that was environmentally friendly, culturally sensitive and had less impact than high numbers of visitors. Regenerative tourism takes sustainability one step further and focuses on the net benefit of the visitor economy to a destination, looking at social and cultural benefits and costs. "Regenerative tourism is bolder and more inspiring. It aims not just to do less harm, but to go on and restore the harm that our system has already done to the natural world, and by using nature's principles, to create the conditions of life to flourish. It views wholes and not parts, and is a very different way of looking at the world." (Anna Pollock, international tourism consultant and founder of Conscious Travel)

Many of the actions in this plan take a regenerative tourism approach.

Formation of the DMAP

The process of the development of the O’ahu DMAP started with the HTA, the City & County of Honolulu’s Office of Economic Revitalization and the O’ahu Visitors Bureau (OVB) developing a list of O’ahu stakeholders who represented the visitor industry sectors (hotel, attractions, activities), other business sectors (e.g. agriculture, retail), the community (e.g. Hawaiian culture, education, regional), and other nonprofit organizations. They also represented the communities that they live in. Invitations were sent, and 23 members volunteered their time to participate on the O’ahu Steering Committee (see Acknowledgement section).

During the first Steering Committee virtual meeting, the members reviewed HTA’s Strategic Plan, including HTA’s key performance indicators and four pillars. These plans are the foundation of the O’ahu DMAP. After an overview, the group critically examined destination attributes valued only by residents, only by visitors, and by both the residents and visitors. They also discussed the destination attributes that are at-risk or threatened. The Steering Committee also discussed several goals and a vision for tourism on O’ahu. From there, the Steering Committee brainstormed actions – what to protect or mitigate, what to preserve or grow, and where the gap can be closed or bridged. During subsequent meetings, the actions were grouped, and overarching anchor actions and sub-actions were identified. These were presented to residents at two virtual community meetings via Zoom on May 4 and May 5, 2021. The community was encouraged to provide input at the virtual community meetings as well as through an online input form.

After reviewing the community feedback, the Steering Committee met virtually again. They revised actions and then ranked the anchor actions in order of importance. HTA staff, the City and OVB reviewed the proposed actions to confirm they could be done under their respective purviews. The Steering Committee had additional meetings to review the revised list of actions and provide comments and adjustments. All of the anchor actions were developed by the Steering Committee with input from the community.

Implementation Framework

Hawai’i’s tourism industry is at a critical point and residents’ livelihoods depend on the recovery of the visitor industry – directly or indirectly. Tourism needs to be managed responsibly so that residents and destinations can thrive. HTA is leading many of the efforts in the O’ahu Destination Management Action Plan. However, there needs to be collaboration and support from other state and county agencies, the community, the visitor industry and other sectors, to help move the actions forward.

This is a three-year plan and a living document that will be evaluated annually against key performance indicators.

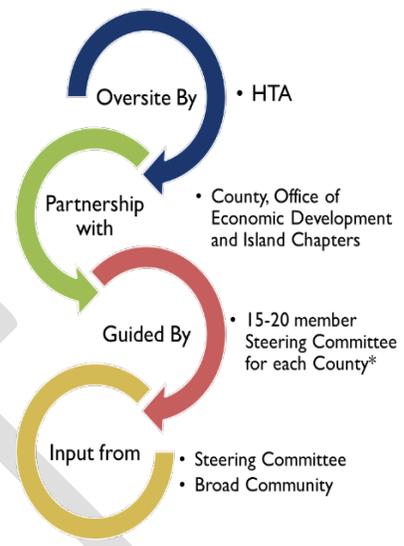


Figure 1: Collaborative Process

‘A’ohe hana nui ke alu ‘ia.
“No task is too big when
done together by all.”

- ‘Ōlelo No’eau (Hawaiian Proverb)

II. Overview of Tourism in Hawai'i

Statewide Trends

Tourism has remained the primary economic driver for Hawai'i's economy across all islands. In 2019, tourism was 16.2% of Hawai'i Gross Domestic Product (GDP), second to real estate and rental and leasing at 18.8% of Hawai'i GDP. Jobs in the tourism industry accounted for 20% of total jobs in Hawai'i while jobs in the real estate and rental and leasing sector accounted for 4.4% of total jobs. For the past eight years, the State of Hawai'i's visitor industry sustained annual growth in terms of arrivals and expenditures. In 2019, tourism was the largest single source of private capital for Hawai'i's economy. Total visitor spending reached \$17.84 billion (1.1% increase compared to 2018). Tourism generated \$2.08 billion in state tax revenue. A total of 10,424,995 visitors came to the Hawaiian Islands by either air service or cruise ship (5.4% increase over 2018).

The visitor industry has provided steady employment opportunities and supported the development of small businesses throughout the state. In 2019, tourism supported 216,000 jobs 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 (e.g., hotels and resorts), however, unpermitted short-term rentals increased in Hawai'i's neighborhoods.

Prior to the global COVID-19 pandemic, 2020 was set to be another year of unprecedented growth for Hawai'i. However, flight cancellations to the Hawaiian Islands began in February 2020, initially affecting the China market. On March 14, the CDC began enforcing the No Sail Order on cruise ships. On March 17, Hawai'i Governor David Ige asked upcoming visitors to postpone their trips for at least the next 30 days. The counties also began issuing stay-at-home orders. Effective March 26, all passengers arriving from out-of-state were required to abide by a mandatory 14-day self-quarantine. Exemptions included travel for essential reasons like work or health care. By the end of March the majority of flights to Hawai'i were cancelled, and the visitor industry was severely impacted. On April 1, the mandatory self-quarantine was extended to inter-island travel and the state's four counties enforced strict stay-at-home orders and curfews that month. Nearly all trans-Pacific flights to Hawai'i were cancelled in April.

For all of 2020, total visitor arrivals declined 73.8 percent from the previous year to 2,716,195 visitors. There were significantly fewer arrivals by air service (-73.8% to 2,686,403). Arrivals by cruise ships (-79.2% to 29,792) also decreased considerably, as cruise ships were operating only for the first few months of the year. Total visitor days fell 68.2 percent.

In 2020, visitor arrivals by air service decreased sharply from U.S. West (-71.6% to 1,306,388), U.S. East (-70.3% to 676,061), Japan (-81.1% to 297,243), Canada (-70.2% to 161,201) and All Other International Markets (-80.4% to 245,510).

Hawai'i's unemployment rate increased from 2.0 percent in the first quarter of 2020 to 19.4 percent in the second quarter of 2020. After this peak, the rate declined to 14.5 percent in the third quarter of 2020, 11.2 percent in the fourth quarter of 2020, and then 7.7 percent in the second quarter of 2021.

Resident Sentiment

HTA conducts an annual Resident Sentiment Survey (RSS) to gauge resident attitudes toward tourism in Hawai'i and to identify perceived positive and negative impacts of the visitor industry on residents.

Positive resident sentiment is important to maintain a healthy industry. The 2019 RSS report showed that resident sentiment had generally weakened compared to the previous year. By extension, the quality of the visitor experience will likely decline if this trend continues. For now, the two are inexorably linked and changes are necessary to improve resident sentiment – there must be a better balance of economic, social and cultural, and community benefits from tourism. Providing residents with a voice in tourism development, creating jobs with opportunities for advancement, and creating shopping, dining and entertainment opportunities are key to improving resident sentiment.

Tourism Forecast

According to the Department of Business, Economic Development & Tourism’s (DBEDT) 2021 second quarter Outlook for the Economy, visitor spending will increase 117.8 percent in 2021, then will increase 34.0 percent in 2022, 12.9 percent in 2023, and 7.2 percent in 2024. Hawai’i is expected to welcome 6.6 million visitors in 2021, an increase of 144.4 percent from the 2020 level. Visitor arrivals are anticipated to increase to 8.6 million in 2022, 9.5 million in 2023, and 10.1 million in 2024.

DBEDT projects that for 2021, the average annual unemployment rate will be 7.7 percent, then decrease to 6.3 percent in 2022, 5.6 percent in 2023, and 5.0 percent in 2024. These rates are much higher than Hawaii’s average unemployment rate of 2.5 percent from 2017 to 2019.

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Tourism on O'ahu

Riding the surge of global travel in 2019, O'ahu saw visitor arrivals reach a record 6.15 million visitors. Those O'ahu visitors contributed \$8.14 billion in expenditures to Hawai'i's economy. On average, visitors stayed 6.8 days and spent \$195 per person per day.

Tourism on O'ahu accounted for 45.6 percent of all tourism spending in Hawai'i and supported 99,152 jobs (direct, indirect and induced).

There were 8.3 million scheduled transpacific air seats to the Daniel K. Inouye International Airport (HNL) – 4.0 million from U.S. West, 0.9 million from U.S. East, and 1.9 million from Japan and 1.5 million from other countries. On O'ahu there are 39,240 units available for visitors with 27,060 hotel units, 3,956 condo hotel units, 3,821 vacation rental units, 3,782 timeshare units, and 621 other types of units.

O'ahu had an average hotel occupancy of 84 percent and an average daily hotel room rate of \$235. Other visitor accommodations also were experiencing boom times (timeshare: 95% occupancy, vacation rentals: 75% occupancy). Approximately 60 percent of visitors stayed in hotels, while condo (10%), timeshare (10%) and rental houses (10%) were also well used.

Visitors commented that O'ahu needed to improve its traffic situation which ultimately impacted their travel experience. They also stated that the island needs more local cultural experiences.

Overall 79 percent of O'ahu visitors gave it high satisfaction marks¹. However, a study by DestinationNEXT² found some concern that O'ahu had issues with accessibility for disabled, walk and bikeability, needed improvement in public Wi-Fi, and did not have enough outdoor recreation and sports facilities.

On O'ahu, visitors did less self-directed tours and driving around the island than on the other major islands. Like other island, visitors visited the beach for sunbathing. However, they were less likely to swim in the ocean or hike.

However, at the same time, O'ahu residents strongly felt that overcrowding, traffic problems, damage to the environment, and increased cost of living were problems being caused by tourism. Resident sentiment towards tourism had significantly weakened in 2019 compared to the previous year (The percentage of visitors who said that the overall impact tourism had on their family was extremely positive was 24 percent positive in 2018 but 16 percent in 2019).³

Then in 2020, the consequences of the global pandemic resulted in visitor counts down 75 percent compared to last year. The number of direct air seats into O'ahu was also down 60 percent. The decline in the visitor industry also resulted in a loss of jobs on O'ahu, with accommodation jobs down 48 percent (-9,200 jobs) and food service, restaurants and drinking places losing 15,900 job for a loss of -33 percent.

Now in 2021, there were 310,744 visitors to O'ahu in May 2021, compared to 6,587 visitors in May 2020, versus 508,088 visitors in May 2019. Visitor spending was \$418.3 million, down 39.5 percent from \$691.1 million in May 2019. The average daily census showed that there were 80,895 visitors per day on O'ahu in May 2021, compared to 5,503 visitors per day in May 2020, versus 109,584 visitors per day in

¹ Satisfaction: The percent of visitors who rated a 7 or 8 on a scale where 1=Poor and 8=Excellent.

² DestinationNEXT Multi-User Diagnostic Assessment:Hawaii Statewide, Destinations International and MMGY NextFactor, December 30, 2019

³ HTA Resident Sentiment Survey 2019 Highlights, February 2020. Field dates: September 27 to November 14, 2019.

May 2019. Through the first five months of 2021, there were 925,147 visitors to O‘ahu compared to 1,232,750 visitors (-25.0%) in year-to-date 2020, versus 2,462,487 visitors (-62.4%) in year-todate 2019. For the first five months of 2021, total visitor spending of \$1.24 billion was a 62.2 percent decrease from \$3.29 billion in year-to-date 2019.

In 2021, as more visitors arrive in the islands, the overall visitor satisfaction is trending downward from 85 percent rating their trip excellent at the beginning of 2021 to 76 percent in June 2021.⁴ The top complaints included limited capacity and availability of restaurants and attractions as well as finding Hawai‘i too crowded. Further, fewer visitors indicated they did all the activities that they had planned for, mainly due to the difficulty to get a reservation.

In the most recent Resident Sentiment Study⁵ released in June 2021, 55 percent of O‘ahu residents felt that tourism has brought more benefits than problems. This rating is slightly higher than the other counties but has gone down slightly from 61% in 2019. On the geographic level, residents were particularly critical of tourism and its impact on the Wai‘anae, Windward and the North Shore communities.

Residents were also asked to rate the importance of specific strategies for the state to better manage tourism.

- 88% of O‘ahu residents said that it was important for the state to educate visitors and residents to mālama the islands and each other
- 74% - eliminate illegal vacation rentals on my island
- 71% - charge visitor access fees to state parks and trails
- 66% - encourage visitor to volunteer and give back during visits to Hawai‘i
- 64% - not allow building of additional hotel/condo/timeshare units on my island
- 62% - stop approval of additional legal vacation rentals on my island
- 57% - designate resident-only days at some state parks, beaches and trails

O‘ahu residents also said that the top problems created by tourism in Hawai‘i were: overcrowding, traffic problems, damage to the environment, and too great a dependency on tourism.

⁴ HTA Visitor COVID-19 Study, June 2021. Among visitors to Hawai‘i from the U.S. Mainland who visited Hawai‘i from May 15-24, 2021.

⁵ HTA Resident Sentiment Survey 2021 Highlights, June 2021. Fielding dates: April 27 through June 2, 2021.

Situation Analysis Summary

As a part of the DMAP process, a SWOT analysis was conducted by the Steering Committee who identified the destination's existing strengths and problems, as well as opportunities and threats present in the external environment. The SWOT analysis is a useful tool in the decision-making process, as it can be used to evaluate strategic positioning, as well as identify projects that would be reasonable to execute in the short term. This feedback was supplemented with research and data that helped to support the observations that were made. The information below provides more details on each section of the SWOT analysis matrix shown on Table 1, page 16.

STRENGTHS

- **SAFETY.** O'ahu, along with the State of Hawai'i, is generally perceived as a "safe" destination.
 - The State and the City & County of Honolulu have prioritized safety and health during the pandemic. As O'ahu moves forward, these systematic prioritizations and strategies on testing, vaccination, quarantine of travelers, Safe Travels, and other safety measures have resulted in some of the lowest number of COVID infection cases and death in the U.S. This further speaks to and confirms the validity and perception of O'ahu (and Hawai'i) as generally being a safe destination that prioritizes health and safety for residents, community and visitors.
 - Hawai'i's violent crime rate in 2021 (2.9 incidents per 1,000) is lower than the national rate of 3.7.
- **DEPTH OF PRODUCT.** O'ahu's "Town & Country Experiences, All On One Island" positioning continues to set O'ahu apart from the other Hawaiian Islands and is generally unique for Pacific Island destinations. Alongside O'ahu's offerings of Hawaiian cultural and historical experiences, O'ahu boasts a robust multicultural community with a wide range of experiences and offerings.
 - O'ahu has the highest number of visitor accommodation units, venue space, ground transportation, air transportation (flights) and experiential infrastructure than any other Hawaiian Island, lending itself to better accommodating the needs of both the leisure and meetings markets.
 - Honolulu Harbor is the embarkation or disembarkation point for most cruise ships resulting in additional pre or post cruise stays on island.
- **NATURAL BEAUTY.** Natural beauty and outdoor experiences have not been compromised during the pandemic and continues to exist around O'ahu.
 - Due to the pandemic, locals experienced lockdowns and were encouraged to minimize activities away from home. Visitors were also absent from the island. This has given many natural sites a brief moment to rejuvenate due to the separation from human overuse. Hanauma Bay is a good example of this.
 - After the "stay/work at home" lockdown throughout the State, country and globally, O'ahu's beauty and outdoor experience are highly attractive to those with pent up travel desires.

- Many of O’ahu’s natural sites and outdoor recreational areas are accessible to residents and visitors because of the City’s well-developed roads and transportation infrastructure.
- **TOURISM JOBS AND WORKFORCE.** The pandemic has brought about some of the highest layoffs and furloughs of any industry.
 - However, O’ahu has the largest pool of tourism workers compared to the other islands, giving it an advantage to having the right number of skilled workers necessary for the recovery period.
 - O’ahu has multiple universities and colleges that can develop and provide education and workforce training programs.
- **APPEAL.** O’ahu has traditionally had a strong international appeal. O’ahu attracted 50% domestic and 50% international visitors, pre-pandemic.
 - Historically, market mix was an O’ahu strength. Currently, it can be construed also as a weakness due to the impact of closed international borders and travel. However, O’ahu hopes to see this dynamic return as the world returns to normalcy in the future.
- **MEETINGS AND CONVENTIONS.** Oahu draws more meetings than any other island and offers a multitude of convention and incentive opportunities, including the Hawaii Convention Center. The meetings traveler spends significantly more than the leisure visitor. Convention and business meetings also generate ancillary spending in the destination through rental of event space, equipment leasing, and corporate hospitality functions.

PROBLEMS

- **HOTSPOTS.** Recreational sites, attractions and communities are overtaxed by crowds or inadequate infrastructure creating many “hotspots” where residents and visitors compete for access to the same resources and locations.
 - The Steering Committee felt that 6.15 million visitors in 2019 was too much for the current infrastructure, natural resources and residents’ quality of life.
 - Intrusion into residential neighborhoods
 - Inadequate maintenance and enforcement
 - Inconsistencies in park policies and reservation systems
 - Lack of or poor infrastructure in parks, beaches, and bathrooms
- **Illegal Vacation Rentals.** County policy on transient vacation rentals is the most restrictive of all the counties; and this policy is still not fully resolved, etc.
- **COST OF TRAVEL.** Due to current pandemic policies in place, the cost to travel to O’ahu includes testing costs, higher accommodation rates, additional fees, etc. increasing the travel cost. The limited availability of attractions and rental cars has also driven up prices. Unfortunately, the cost to visit Hawai’i does not always match up to the expected level of service and experiences. These costs are expected to be temporary but for how long, is unknown.
- **PRODUCT DECLINE.** Due to the COVID-19 pandemic, many of O’ahu’s “experiences”, including but not limited to accommodations, attractions, activities, tours, restaurants and festivals &

events, that provide O‘ahu a depth of products may not survive the economic impact of the pandemic and O‘ahu will have less to offer.

- Most visitor industry businesses are facing challenges of reopening to full capacity, impacting the O‘ahu travel experience, which could impact a prospective visitor’s travel decision.
- Native Hawaiian-owned firms in the tourism sector are smaller in terms of employment size, lower annual average wage, and lower annual sales per firm as compared with state averages⁶ and are therefore more at risk for failure. Their loss could lead to fewer authentic experiences in art, entertainment and recreation.
- **MARKETING & DESTINATION MANAGEMENT BUDGET CUTS.** HTA, Hawai‘i Visitors & Convention Bureau (HVCB), HTA’s Global Marketing Team (GMT) and O‘ahu Visitors Bureau have seen and will continue to experience reduced funding for crucial management efforts of the destination (related to community, environment and culture) and budget cuts for marketing efforts necessary to kickstart the tourism economy, effectively target the appropriate type of visitor, and to compete with other destinations that are aggressively focused on capturing the same market share.
 - 2021, and for the next several years, State tax collections and revenue might be significantly reduced due to a slower economy. This will most likely result in cuts to tourism funding and, subsequently, a lack of ability to provide desired contracted services to manage and market tourism.
 - Act 001, Special Session 2021 repealed the tourism special fund and transient accommodation tax allocation to the counties. This created an uncertainty in the source of tourism funding.
 - O‘ahu continues to be the only island that does not receive county resources (budget and otherwise) to help with O‘ahu’s tourism efforts and marketing.
- **UNEMPLOYMENT AND WORKFORCE.** Currently, the State’s dependency on tourism has contributed to one of the highest unemployment rates in the nation, resulting in a severe downturn in the local economy. Rate of recovery for O‘ahu’s tourism industry may vary and is unknown. Due to the pandemic, much of O‘ahu’s travel related workforce was furloughed or eliminated. It poses two problems. After a long period of not working, bringing back this workforce will require much training to bring the level of service back up to where it was or should be. This takes time and resources. In the meantime, it may tarnish the brand’s delivery of quality service. Secondly, the exodus of residents may have continued during the pandemic as talent was drawn out of State to look for jobs elsewhere.

Native Hawaiians accounted for 16 percent of the total workers in the tourism sector. However, their average wage and salary income was lower than the state level in each of the tourism intensive industries, especially in the real estate and rental and leasing industry where Native Hawaiians on average earned only three fourths as much as the industry level.⁷ Understanding

⁶ Native Hawaiian-Owned Firms in Hawai‘i’s Tourism Sector, DBEDT, March 2017.

⁷ Native Hawaiians in Hawai‘i’s Tourism Sector, DBEDT, April 2017.

why Native Hawaiians are underrepresented in our largest industry and how to increase employment is critical to addressing diversity, equity and inclusion in the visitor industry.

- **RESIDENT SENTIMENT.** Many residents do not fully comprehend the economic impact of Hawai'i's tourism industry and the number businesses and jobs that are integrated into this industry.
 - Growing resident sentiment by those unaffected by tourism downturn may still look at visitors as reckless "carriers of COVID" endangering their community. They may view the loss of visitors as a benefit to O'ahu, rather than a problem.
 - Many hot spots on O'ahu result from O'ahu's large resident population and visitors vying for access to the same resources and locations.
- **RECOVERY OF INTERNATIONAL TRAVEL:** O'ahu attracted 50% domestic and 50% international visitors, respectfully.
 - Due to closed international travel and borders (many closed through parts of the year), the difficulty of traveling for international visitors into the U.S., has reduced O'ahu's visitor number and mix drastically.
 - With reductions in flights and travel from international markets, O'ahu's remaining market – the domestic market – is insufficient to support current capacities required for a healthy recovery. It also puts competitive pressure on O'ahu and her sister islands.

OPPORTUNITIES

- **TRAVEL DESIRE, TRAVEL PATTERNS.** Not all sectors of the U.S./global economy have suffered during the pandemic, allowing for a portion of the population to still have discretionary income. Though income behavior and attitudes towards discretionary income may have changed, people who can afford travel want to escape the pandemic stress. A spike in travel from those who feel healthy and financially stable is anticipated.
 - Hawai'i ranks top as a desired destination. For most Americans, beach destinations are priorities as their first post-pandemic trip - California and Florida would also be two sun and sand domestic competitors but they were also hubs for large outbreaks.
- **VACCINATIONS.** Confidence level to travel increases tremendously with the knowledge that vaccinations, protocols and testing is making it safe to travel.
- **SAFETY & HEALTH.** Hawai'i's diligence in managing COVID-19 has provided a very positive and respected perception of Hawai'i as a destination that cares about residents, community, and visitors. This has positive implications for O'ahu and the other counties.
- **COMPETITIVE DESTINATIONS' RECOVERY MOVING SLOWER.** Some competitive destinations that appeal to Hawai'i's Avid Traveler (i.e., Thailand, Costa Rica, Australia, etc.) lag Hawai'i in its recovery and marketing efforts, due to slower vaccination availability and dissemination, closed borders and travel restrictions.
- **INTERNATIONAL TRAVELERS.** O'ahu has the infrastructure and language capabilities to support an increase the number of International visitors. International visitors have higher expenditures and show a higher propensity to follow respectful travel and engage in Mālama Hawai'i practices.

- Many top competitors for international visitors were hardest hit: Top competing destinations (i.e., California, Florida, Europe, etc.) were considered the hotbeds of the virus and there may be residual fear and avoidance of these destinations especially with Asian travelers.
 - The State has already created cooperative solutions to welcome major international markets (Japan, Korea, Canada, and Philippines) that still find it difficult to enter other countries.
- **REBRAND THE HAWAI'I EXPERIENCE.** Use the recovery period to guide and manage tourism messaging and products to better align with regenerative tourism goals.
 - Benefit from the movement to buy and consume local, seek authentic experience, minimize carbon footprint, and support communities.
 - Compensate local community members to share their mana'o of their place. This creates a transformative and healing experience.
 - Rethink our marketing to educate and share with visitors pre-arrival so they can be better stewards while they are here.
 - Offer viable options to control visitor movement.
 - Involve residents in the experiences offered to visitors.
- **PARTNERSHIPS WITH INDUSTRY.** Capitalize on the relationships with hotels and airlines developed during the pandemic:
 - For campaigns about safety protocols to install trust and confidence with potential travelers.
 - To commit to sustainable environmental practices.
- **MANAGING VISITORS.** Increased cost for visiting Hawai'i does not have to be only a problem or threat. These can be opportunities to attract less visitors, but the right visitors.
- **DIVERSIFYING THE ECONOMY.** Discover new and innovative ways to diversify the economy beyond tourism.
 - Consider other industries that can support the visitor infrastructure such as the film industry which typically brings in higher wage-earning short-term workers that could compensate for leisure visitors.
 - Potential to recruit long-term stay visitors who can work remotely.

THREATS

- **AIRLINE AND CRUISE INDUSTRY UNCERTAINTY.** Primary way to visit O'ahu and the Hawaiian Islands is by air travel. Destination is highly dependent on sustainable air service into the destination. Concern arises with the possibility of airlines diverting aircrafts once international destinations open up, and unknown recovery strategies of the airlines. Flight/Airplane reconfiguration for social distancing and required cleaning protocols would further increase the cost of air travel. Cruise ship scheduling is dependent on the availability and placement of ships in other destinations.
- **CONSUMER CONFIDENCE IN FLYING & TRAVELING.** Perceived safety of travelling on commercial airlines and cruise ships is low. Additionally, many Americans may prefer to travel

closer to home or within driving distance of their home in the recovery period of this year (2021).

- **ECONOMIC RECOVERY.** Economic recovery in both the U.S. and most of O’ahu’s key international markets may be slow and uncertain. In turn, prospective visitors may choose to travel closer to home to save their discretionary income. Consumer confidence has taken a major hit in terms of personal finances and health/safety. Travel patterns and behaviors may change depending on the economic recovery and perceived need to use discretionary income differently.
- **REGIONAL TRAVEL.** An extension of the local-slow movement, growing sentiment of American travelers to opt out of long-haul trips to choose to explore more local and regional travel.
- **POLICIES OF OTHER DESTINATIONS.** Other destinations may relax their travel/quarantine mandates sooner, opening themselves up as a more attractive travel option. O’ahu may lose that initial surge of travel due to City/State protective measures and may face challenges to competing.
- **INTERNATIONAL TRAVEL:** Many of O’ahu’s international visitors are from countries with borders closed or travel restrictions. Additionally, perceived safety of travelling outside of one's country may be the sentiment globally. This would continue to impact O’ahu, as half of O’ahu visitors are international travelers.
- **SAFETY CONCERNS.** Due to the general fear of the virus and the new variants within the U.S. and from other countries, prospective visitors may still be cautious or possess residual fear for travel in 2021, possibly into 2022/2023.
 - The uncertainty of policies in other states and countries that affect outbound travel may continue to limit or discourage travel to Hawai’i for some time.
- **COMPETITION.** As O’ahu moves forward in a post-pandemic environment, O’ahu will face aggressive competition by all destinations who are open for business; even those not typically in its competitive set. Other destinations have already been assertive in their tourism recovery efforts. Costs to market to our pre-pandemic customers may have increased. Potential policies pushing for additional fee collection will increase the cost of the visit, and decrease the competitive advantage.

Table 1: Situational Analysis Summary

<p>STRENGTHS</p> <ul style="list-style-type: none"> • Perceived as a safe and welcoming destination • Multicultural community • Vibrant local communities • Natural beauty and outdoor experiences • Unique Hawaiian culture and rich history • Strong international appeal • Time-tested professional hospitality infrastructure • Greater depth and choice of activities, historical sites, and attractions than other destinations • Convention and meeting facilities 	<p>PROBLEMS</p> <ul style="list-style-type: none"> • Many “hotspots” resulting from residents and visitors vying for access to the same resources and locations (locations are overtaxed by crowds or inadequate infrastructure) • The number of visitors in 2019 was perceived to be too much for the current infrastructure, natural resources and residents’ quality of life • Intrusion into residential neighborhoods • Global pandemic has created wary residents who distrust outsiders (bringing in COVID, buying high priced homes to live in) • Reduced funding for crucial destination management and marketing efforts • Many attractions, experiences & small businesses may not survive the pandemic • Workforce not aligned with current needs • Cost of travel • Recovery of international travel • Illegal vacation rentals add additional supply which allows high number of visitors • Problematic visitors feel entitled to unlimited access, seek secret places, and desire to boast on social media
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • Rebrand the Hawai’i experience • Beach destinations rank high as the preferred vacation post-pandemic • Capitalize the possible near-term surge in visitors from those who feel healthy and financially stable or cannot or will not travel to other destinations • Diversify the economy with industries that are complementary with the visitor industry. • Industry partnerships for safety and environmental initiatives • Increased cost for visiting Hawai’i and lower loads don't have to be only a problem or threat. These can be an opportunity to have less visitors, but the right visitors. • Managing visitors 	<p>THREATS</p> <ul style="list-style-type: none"> • Economic opportunities tend to be valued more than natural and cultural resources • Long-term trend towards more regional travel driven by generational segments that are less adventurous, push for localism, decreasing the travel carbon footprint, etc. • Aggressive competition by all destinations

III. Vision for O‘ahu Tourism

The O‘ahu DMAP vision was created based on feedback provided by the Steering Committee at multiple meetings.

By 2024, together with the community, the visitor industry will be rooted in mālama – to take care of this place and each other. O‘ahu will live in joy, abundance, and resilience because visitors and residents understand what is pono, share common goals, and have respect for each other and the environment.

IV. Goal

The goal of the DMAP is to **rebuild, redefine and reset** the direction of tourism over a three-year period.

V. Objectives

There are six objectives to achieve the goals and vision of the O‘ahu DMAP.

Objective 1: Create positive contributions to the quality of life for O‘ahu’s residents.

Objective 2: Support the maintenance, enhancement, and protection of O‘ahu’s natural resources.

Objective 3: Ensure the authentic Hawaiian culture is perpetuated and accurately presented in experiences for residents and visitors, materials, and marketing efforts.

Objective 4: Maintain and improve visitor satisfaction of their experience on O‘ahu.

Objective 5: Strengthen the economic contribution of O‘ahu’s visitor industry.

Objective 6: Increase communication and understanding between the residents and visitor industry.

VI. Actions

The actions were developed by the Steering Committee and the community. In some cases, the HTA took the essence of the community’s feedback and input and turned it into an action.

The actions were shaped by underlying issues that were identified by the steering committee and also appeared in the community input:

- Reduce visitor impacts by improving infrastructure, actively managing sites, and decreasing the number of visitors.
- Desire for collaborative efforts among all industry partners in support of natural resources.
- Ensure a balance between the needs and wants of residents and visitors, and the well-being of O‘ahu.
- If residents are not happy then visitors will sense that and will not have a good experience.
- We must manage the visitor experience with capacity limits at hotspots, promoting or allowing only selected experiences, and offering alternatives to move visitors away from hotspots.
- We must educate our visitors about respect for this land and its people.
- We must pivot towards regenerative tourism. Regenerative tourism is how tourism can make destinations better for both current and future generations.

The community mentioned about limiting the number of visitors to the island, as well as the reducing the number of rental cars. Unfortunately, HTA has no control over these. The free movement of people to travel to the islands and between the islands falls under federal jurisdiction. And businesses are free to operate on the islands so long as they do not break any laws. The goal of the DMAP presentations was to gather input from the community regarding how best to manage tourism on the individual islands before and after the visitors arrive as well as how we mālama the visitors, and each other, once the visitors are here. This includes considerations around protecting our ‘āina and perpetuating the Hawaiian culture. This does not, however, include deciding who can and cannot come to an island specifically, or to Hawai‘i in general, since HTA does not have control.

Much discussion was had on diversifying Hawai‘i’s economy to be less dependent on tourism and therefore decrease the risk of another global shock. There were also suggestions to increase efforts to bring in more sports events or support other similar industries. The State is already addressing this issue through its Hawai‘i Economic Revitalization Task Force and other efforts through DBEDT. Therefore, the DMAP does not include any specific actions to address developing new industries or workforce retraining.

The following tables identify opportunities and needs for each of the anchor actions, including the identification of responsible agencies and timing of the action’s commencement and/or delivery over a three-year period. As HTA carries out the DMAP, there will be more organizations and businesses identified to help move this plan forward.

The long-term **measures of success** will be measured through HTA’s Strategic Plan’s four overall Key Performance Measures: Resident Satisfaction, Visitor Satisfaction, Average Daily Visitor Spending, and Total Visitor Spending. A “milestone” is a qualitative way of determining progress toward accomplishing a specific defined action. The **milestones for success** are the completion of each sub action in the phase indicated.

Action A. Decrease the total number of visitors to O‘ahu by managing the number of visitor accommodations and exploring changes to land use, zoning and airport policies.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
A.1	Lower the number of illegal short-term vacation rentals by supporting the County to improve enforcement of current regulations. Support the County in implementing new rules.	L = County – Dept. of Planning and Permitting S = HTA	X	X	X
A.2	Provide resources to engage communities and agencies to collaborate on additional rules; particularly to limit expansion of legal short-term vacation rentals outside of the resort areas.	L = HTA S = community	X	X	
A.3	Commit resources to study methods of limiting supply such as: <ul style="list-style-type: none"> Managing airlift to O‘ahu through landing fees. Controlling new visitor accommodations development through building permits or approvals for new sites. Explore changes to land use, zoning, airport policies, etc. that influence tourism infrastructure that ultimately 	L = HTA S = County, DOT-Airport	X	X	X

	determines the number of visitors that can access O'ahu sites.				
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Action B. Implement a pre- and post-arrival tourism communications program to encourage respectful and supportive behavior.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
B.1	Identify the best messaging and ways to reach and communicate with visitors prior to arrival.	L = HTA S = HVCB/ Global Marketing Team (GMT)	X		
B.2	Produce a mandatory pre-arrival education program to ensure visitors are informed on respectful and supportive practices.	L = HTA S = HVCB/GMT	X	X	X
B.3	Develop a messaging program (physical and virtual) to educate visitors and locals about significant sites or areas and pono practices related to them.	L = HTA S = HVCB/GMT	X	X	X
B.4	Enhance the goHawaii app to include more real time information, road closures, events, local etiquette, resource protection, and areas that are off-limits.	L = HVCB S = HTA/GMT	X	X	
B.5	Boost the goHawaii app with GEO fencing capabilities to notify visitors when they in proximity to a hotspot and redirect them to other more accessible areas through a reservation system.	L = HVCB S = HTA/GMT	X	X	
B.6	Promote use of the goHawaii app to travelers to promote safe travels and communicate with them to understand where to go and not go.	L = HTA S = HVCB/GMT	X	X	X
B.7	Provide visitors with other means of accessing information such as using artificial intelligence to answer visitor questions or share videos and pictures over smart phones to make it easy for visitors to engage.	L = HTA S = HVCB/GMT		X	X

Action C. Identify sites and implement stewardship plans for key hotspots on O'ahu.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
C.1	Work with stakeholders to identify sites associated with public impact on natural and cultural resources. Prioritize sites where: 1) communities and/or neighborhoods that have issues with visitors; 2) conflicts within communities regarding visitors; or 3) residents' access and traditional cultural access need protection.	L = HTA S = Dept. of Land and Natural Resources (DLNR), County, private landowners; communities	X	X	X
C.2	Work with communities to determine desired conditions or limits of acceptable change then identify management actions to achieve/sustain those conditions to ensure integrity and avert degradation of hotspots.	L = HTA S = DLNR, County, private landowners; communities	X	X	X

C.3	Develop a process to support government and community collaboration over how to manage and steward sites. Determine if there are similar issues across some of the hotspots, so they can be addressed in a group or pilot program.	L = HTA S = DLNR, County, private landowners; communities	X	X	X
C.4	Increase opportunities for community-led initiatives that steward and manage these resources, including closure of areas and managing traffic.	L = HTA S = DLNR, County, private landowners, communities	X	X	X
C.5	Advocate for increased funding and resources for Department of Land & Natural Resources, City & County's Department of Planning and Permitting and Parks and Recreation to better manage hotspots.	L = HTA S = community and private sector	X	X	X
C.6	Investigate site user fees or hiking permits that goes directly to support and manage specific hotspots and the affected communities. Review studies to determine whether site fees are warranted and how fees are to be processed and returned to that spot or community for maintenance, management, and enforcement. Evaluate if the fees are working.	L = DLNR; County S = HTA	X	X	X
C.7	Explore the process of requiring hikers to apply for and acquire a hiking permit. Fees would also go to reimburse search and rescue expenses. Process would include a mandatory education on safety and protocol while hiking.	L = DLNR; County S = HTA	X	X	

Action D. Increase enforcement and active management of sites and trails.

ACTION NO.	ACTION	LEAD (L)/ SUPPORT (S)	PHASING		
			1	2	3
D.1	Explore ways to improve enforcement of parking rules at hotspots and popular visitor attractions. Crackdown on illegal tour vans and buses dropping people off at beaches and trails.	L = County – customer services (TBC); State PUC S = HTA; community	X	X	
D.2	Increase biosecurity at HNL airport and trails. <ul style="list-style-type: none"> Promote sanitation protocols for cleaning gear. Encourage responsible visitor practices like cleaning gear at hiking trails and not tracking in invasive species. 	L = Dept. Of Agriculture (DOA); DLNR/Division of Forestry & Wildlife; Hawai'i Invasive Species Council S = HTA; County; GMT; community	X	X	

Action E. Develop a reservation system to monitor and manage users at natural resource and cultural sites.

ACTION NO.	ACTION	LEAD (L)/ SUPPORT (S)	PHASING		
			1	2	3
E.1	Explore a reservation system and demand-based fee pricing at popular sites and hotspots.	L = HTA S = HVCB; County; DLNR	X		
E.2	Evaluate the current reservation systems at Hanauma Bay and Lē‘ahi to support a sustainable capacity of visitors and advocate for expansion to other hotspots on the island.	L = HTA S = DLNR; County	X		
E.3	Pilot a program for a state-wide reservation system that can redistribute excess demand to other sites or to other participating attractions.	L = HTA S = HVCB; County; DLNR	X	X	

Action F. Establish a “Regenerative Tourism Fee” that directly supports programs to regenerate Hawai‘i’s resources, protect natural resources, and address unfunded conservation liabilities.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
F.1	Identify how to legally collect this fee (State gives the County the authority to establish such a fee), distribute this type of fee, and develop accountability measures. Fee would support management system, impacted communities, and workforce development in jobs related to invasive species removal, fishpond restoration, coral growing, and native ecosystem restoration.	L = HTA S = DLNR	X	X	X
F.1a	Educate the visitor industry on the need for the fee and how it signifies visitor industry contribution to sustainability.				
F.1b	Share with the traveler/visitor how the fee would be used to enhance their visit by protecting the place.				

Action G. Develop and implement marketing programs to attract positive impact travelers who prioritize environment, culture and investing in our local community.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
G.1	Continue to develop and focus marketing messaging to market segments that appreciate learning about unique cultures and natural resources.	L = HTA S = GMT	X	X	X
G.2	Continue to develop plans to attract higher spending travelers (i.e., meetings, conventions and incentives (MCI) visitors, weddings, business travelers, medical tourism, LGBTQ, and arts and culture).	L = HTA S = GMT	X	X	X
G.3	Continue to reassess and adjust marketing O’ahu with context and not just surf and sand. Include island values, prioritize environment, and culture so we attract the right kind of visitors.	L = HTA S = GMT	X	X	X
G.4	Use marketing campaigns as an opportunity for visitors to connect with O’ahu on a deeper level through immersive experiences, and travel in a way that enriches their lives while giving back to the communities they are fortunate enough to visit.	L = HTA S = GMT	X	X	X
G.5	Continue to develop campaigns to shift visitation from peak periods to slower shoulder periods.	L = HTA S = GMT	X	X	X
G.6	Be intentional about what we promote to ensure that it is authentic. Enhance the current “The Hawaiian Islands” brand guidelines for the industry partners and encourage consistent use.	L = HTA S = GMT	X	X	X
G.7	Develop metrics and collect data to measure marketing effectiveness beyond the economic impacts (e.g., Aloha+ Challenge measures, acceptance of tourism by local residents, visitors participating in voluntourism, buying local, etc.).	L = HTA S = County		X	X

Action H. Continue to develop and implement “Buy Local” programs to promote purchase of local products and services to keep funds in our communities and minimize carbon footprint.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
H.1	Continue to encourage the visitor industry to prioritize purchase of Hawai’i based, ‘āina friendly products, services and technology solutions to include literature, crafts, fashion, music, performance art, film, fresh produce, value-added products, and software.	L = HTA S = DBEDT; DOA; GMT; private industry	X	X	X
H.2	Work with hotels, restaurants, and visitor retail to feature or promote local products.	L = HTA S = DOA; DBEDT; private industry	X	X	X
H.3	Continue to leverage programs that support buying local. Coordinate with various certification programs for a cohesive promotion program.	L = HTA S = DOA; DBEDT; GMT	X	X	X
H.4	Promote O’ahu artisans – including local crafts, fashion, music, performing, and visual arts.	L = HTA S = DBEDT	X	X	X

Action I. Manage the visitors' use of cars as transportation on O'ahu.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
I.1	Work with the O'ahu Metropolitan Planning Organization efforts to examine the issues stemming from visitor traffic in impacted communities. Determine how to alleviate those issues such as developing infrastructure to reduce stress on residential areas or a penalty structure to discourage visitors or industry from violating restrictions.	L = HTA S = County	X	X	X
I.2	Support O'ahu Metropolitan Planning Organization efforts to provide safe, convenient, reliable and efficient private and public transportation to shift visitors from driving rental cars to more environmentally sustainable modes. Include the development, support of, and advocacy for bike paths and the promotion of bicycle use.	L = HTA S = community	X	X	X
I.3	Consider creating pedestrian-oriented areas.	L = County S = HTA		X	X
I.4	Look at shuttles from parking areas to sites to alleviate individual cars or parking reservation systems.	L = DOT, County, DLNR		X	X

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Action J. Work with community partners to develop, market, encourage, and support more collaborative, curated experiences that enrich residents and visitors alike.

ACTION NO.	ACTION	LEAD (L)/ SUPPORT (S)	PHASING		
			1	2	3
J.1	Increase the number of suitable places for visitor and resident activities by renovating popular hikes/sites away from residential areas or developing new sites. Improvements would include: add walking path, develop parking, signage, etc.	L = HTA S = DLNR, County	X	X	X
J.2	Commit resources to promote these sites as alternatives to overused sites or going off the beaten path. Redirect visitors to these areas that can accept higher traffic away from residential areas. Enhance these places with signage and messaging, develop programs, educational offerings, increase exhibits, etc.	L = HTA S = GMT; DLNR; County		X	X
J.3	Develop new recreational opportunities for residents to ease the burden on sites that are heavily used by visitors and residents.	L = DLNR and County S = HTA	X	X	X
J.4	Explore the creation of a curated “city pass” program to move visitors to sites and attractions that have capacity and infrastructure to handle more visitors.	L = OVB S = HTA, GMT		X	
J.5	Examine creation of “Kama’āina Days” at identified sites with priority for weekends.	L = HTA S = DLNR, County	X	X	

VII. Tourism Hotspots

A “hotspot” is an area or site that attracts visitors due to its popularity, which may result in overcrowding, congestion, degradation of resources, safety hazards, and a negative experience for both residents and visitors.

While HTA is not an enforcement agency, it can be a catalyst to bring together respective state and county agencies, the community, and private sector to develop solutions that address hotspot sites and areas.

HTA reviewed the community’s input from the community surveys and meetings, and feedback from the County, OVB and the Steering Committee. Below are the identified hotspot areas and sites that HTA will monitor together with the respective agencies as needed to help mitigate issues. Other areas and sites were identified, but the locations of utmost concern are:

- North Shore/Hale’iwa – traffic
- Kailua Beach and Town – access and community impact
- Hanauma Bay & Hanauma Bay Nature Preserve – environmental
- Waikīkī – capacity
- Laniākea/Turtle Beach – traffic, environmental, safety
- Diamond Head (Lē’ahi) – capacity
- Ka’ōhau Beach, Pillbox hike and neighborhood – access and community impact
- Ha’ikū Stairs / a.k.a. Stairway to Heaven – access, safety, and community impact
- Makapu’u hike – access, environmental
- Ka’ena Point – environmental
- Ma’eli’eli Trail (Ahuimanu/Kahalu’u) – capacity, environmental, and community impact
- Maunawili Falls – capacity, environmental, and community impact
- Lulumahu Falls – capacity, environmental, and community impact
- Koko Crater – capacity, community impact
- Hālonā Blowhole & Cove – safety
- Kūkaniloko Birthing – culturally sensitive
- Kaniakapūpū Ruins – culturally sensitive

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Glossary

Average Length of Stay: Number of days visitors are on the island, including the day of arrival and the day of departure.

Average Daily Census: Average number of visitors present in Hawai'i on a single day.

Carrying Capacity: The maximum number of people that may visit a tourist destination at the same time, without causing destruction of the physical, economic, socio-cultural environment and an unacceptable decrease in the quality of visitors' satisfaction.

Day Trip: A journey to a place and back again on the same day, usually for pleasure.

Kama'āina traveler: A Hawai'i resident that visits another island that is not their residence.

Regenerative Tourism: Regenerative tourism is “creating the conditions for life to continuously renew itself, to transcend into new forms, and to flourish amid ever-changing life conditions” (Hutchins and Storm, 2019) - through tourism. It “recognizes its communities and places are living systems, constantly interacting, evolving, self-organizing, efficient, learning, distinct, and vital to create abundance, balance and conditions to support other life, resilience and contribute to a greater system of well-being.” (Earth Changers, 2020)

Sustainable Tourism: According to the World Tourism Organization (UNWTO), sustainable tourism is defined as “Development that meets the needs of present tourist and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and life support systems.”

Per-Person Per-Day Spending: Total spending of an individual on a given day during their stay.

Visitor: Out-of-state traveler who stayed in the State of Hawai'i for a period of time between one night, but less than one year.

Visitor Days: Total number of days visitors are on the island and/or in the state.

Total Visitor Spending: The U.S. dollar amount spent in Hawai'i attributed to a visitor. This includes direct spending by visitors while in Hawai'i, as well as any prepaid package purchased before arrival. The expenditure data does not include trans-Pacific airfare costs to-and-from Hawai'i, commissions paid to travel agents, or portions of the package in another state or country.

Appendix A – Actions for Future Consideration

The following actions were considered by the O’ahu Steering Committee, but did not make it to the top priority actions.

- **Foster seamless interaction between community and visitors through cultural experiences and knowledge.**
- **Work with Destination Management Companies (DMCs) and Meeting Planners to integrate a respectful and supportive visitor program for Meetings, Conventions & Incentives (MCI)**
- **Expand on programs that strengthen partnerships and encourage mutual support between the visitor industry and community organizations.**
- **Create certification programs to ensure that visitor industry professionals are more knowledgeable and share appropriately with visitors.**
- **Expand programs in hospitality training across all facets of the visitor industry.**
- **Implement communications program to encourage resident participation and better understanding of the how “regenerative tourism” is being implemented.**
- **Deepen investment in partnerships with industry to expand sustainable environmental practices.**

The following actions were considered as important actions by the O’ahu Steering Committee. However, further review by HTA and County determined these actions to be beyond the current scope of the O’ahu DMAP. These action would be better served by a community lead and would need additional time to identify organization and work towards an agreement; or the action would require significant review and research beyond the three-year scope of this DMAP.

- **Climate proof tourism areas**
- **Deal with homeless issues**
- **Diversify Hawai’i’s economy to be less dependent on tourism**

Appendix B – Sources

Department of Business, Economic Development & Tourism’s County Economic Conditions:
<https://dbedt.hawaii.gov/economic/qser/county/>

DestinationNEXT Multi-User Diagnostic Assessment Hawai‘i 2019:
<https://hawaiiourismauthority.org/media/4275/assessment-report-hawaii-statewide.pdf>

HTA Annual Visitor Research Report 2019: <https://hawaiiourismauthority.org/media/5062/2019-annual-report-final-for-posting.pdf>

HTA May 2021 Monthly Visitor Statistics: <https://hawaiiourismauthority.org/research/monthly-visitor-statistics/>

HTA 2019 Visitor Plant Inventory: <https://www.hawaiiourismauthority.org/media/4085/2019-visitor-plant-inventory-report-final-rev.pdf>

HTA Resident Sentiment Survey Update 2019: <https://hawaiiourismauthority.org/media/4268/resident-sentiment-board-presentation-02-27-20.pdf>

HTA Visitor Satisfaction & Activity Reports: <https://hawaiiourismauthority.org/research/visitor-satisfaction-and-activity/>

DRAFT

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Discussion and Action to Authorize Staff to Format a Partial Fiscal Year 2022 Budget Using Three Categories: (1) Payroll; (2) Operations; and (3) Brand Marketing; and, Authorize Specific Spending Amounts for each of the Three Categories; and Authorize Staff to Initiate the RFP Process to Expend up to \$28.5m on US Major Market Area, Global MCI, Global Support Services Contracts

Hawai'i Tourism Authority
Fiscal Year 2022
Partial Budget

BLI	Category / (Sub-Category)	Amount
	Payroll	\$ 3,700,000.00
930, 932-936	Salaries	\$ 2,420,000.00
931	Fringe	\$ 1,280,000.00
	Operating and Governance Expenses	\$ 1,000,500.00
901	Administrative	\$ 648,700.00
919	Governance	\$ 121,800.00
915	Organization-Wide	\$ 230,000.00
	Branding	\$ 28,500,000.00
321	US Major Market Area	TBD
331 and TBD	Global MCI	TBD
339 and 350	Global Support	TBD
	Total	\$ 33,200,500.00

ARPA Allocations

Status	Category	Amount	
		HTA	Conv Ctr
Approved	Payroll	\$ 3,210,000.00	\$ 490,000.00
Pending	Operating Expenses	\$ 1,000,500.00	\$ -
	Total	\$ 4,210,500.00	\$ 490,000.00

Legislative Appropriation	\$ 60,000,000.00	\$ 11,000,000.00
CSFRF Allocations (Approved/Pending)	\$ 4,210,500.00	\$ 490,000.00
Remaining Balance	\$ 55,789,500.00	\$ 10,510,000.00

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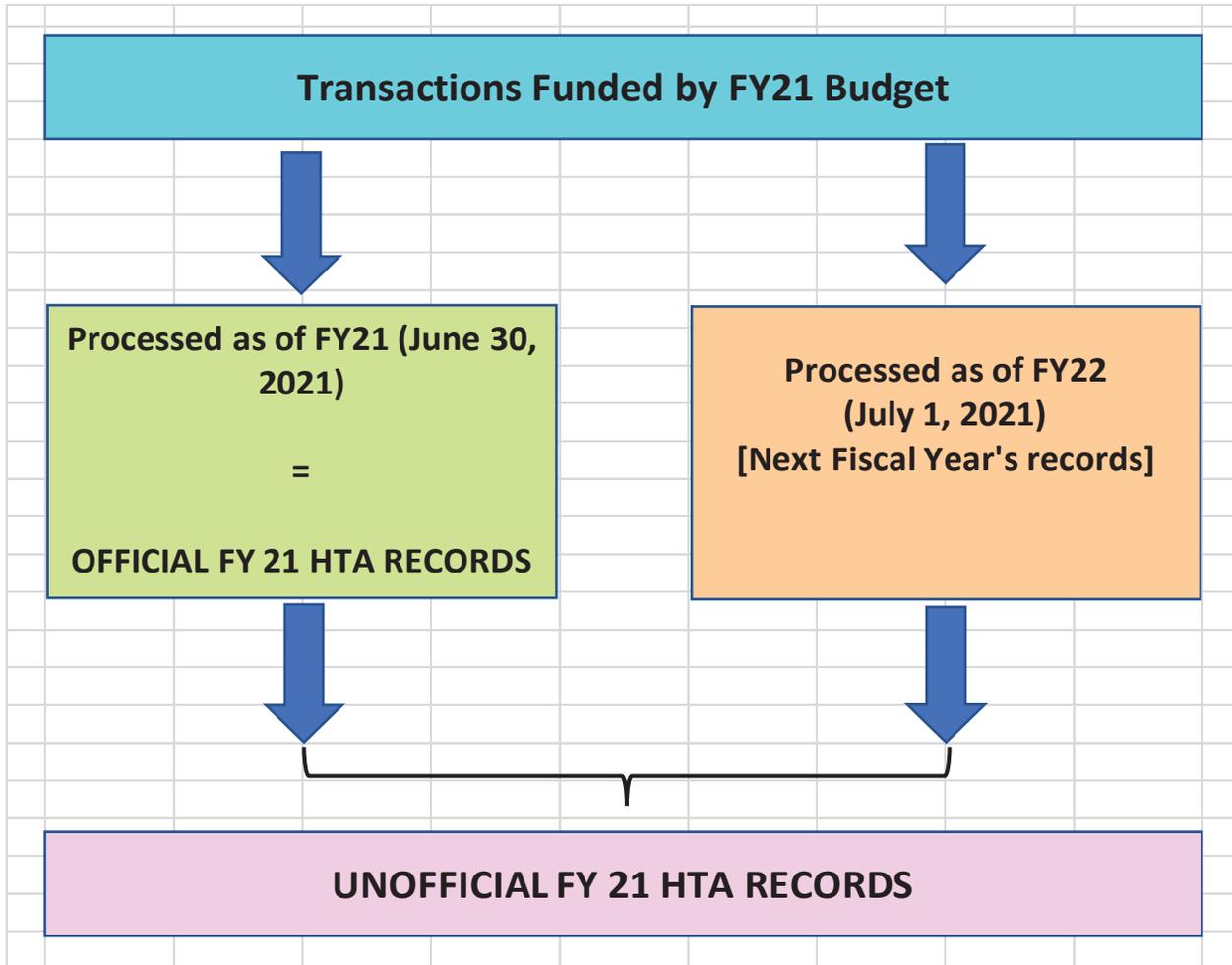
Presentation, Discussion and Action on HTA's
Financial Reports for May and June 2021

HAWAII TOURISM

AUTHORITY

Financial Statements – Executive Summary
May 1, 2021 – June 30, 2021

Foreword:



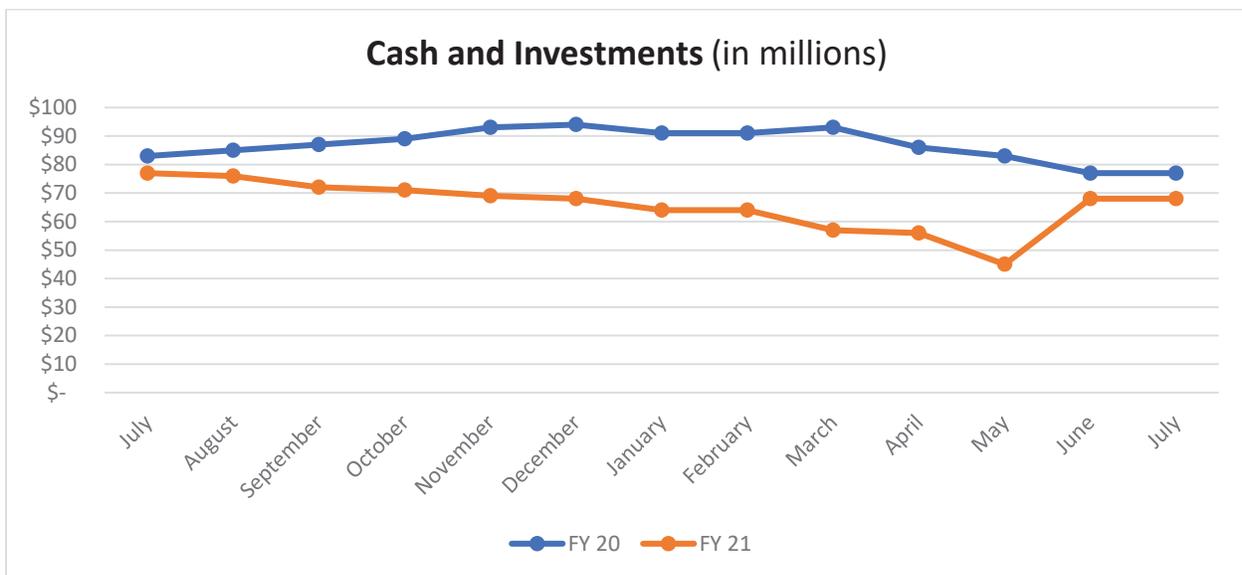
HTA's fiscal year 2021 ended on June 30, 2021. Several transactions that HTA submitted for processing in FY 2021 were instead processed by the Department of Accounting and General Services as July 2021 (FY22) business. For HTA's planning purposes heading into FY 2022, it is important for us to know HTA's financial position as if these transactions were processed as of June 30, 2021, while maintaining records that officially distinguish between what was processed as FY21 and FY22 business. All of these transactions were processed using FY21 funds (HTA's FY21 budget) and will have no impact on our programs. For this purpose and where pertinent, HTA is providing information as of June 30 and July 1 of 2021 within this Executive Summary and accompanying financial statements. The June 30, 2021 balances

represent the official records. The July 1, 2021 balances encompass both the FY 2021 transactions and those processed at the start of FY 2022, which collectively represent all transactions we intended to report as FY21 transactions, and represent the unofficial records.

As discussed further below, HTA amended its FY 2021 Tourism Special Fund and Convention Center Enterprise Special Fund budgets via Board Resolution 2021-2-1 and to reflect TAT funds received in June 2021 that had previously been suspended. The contracts that staff encumbered with these funds, primarily for services in 2022, would ordinarily have been encumbered using FY 2022 funding. To assist with our FY 2022 planning purposes, these encumbrances are separately shown in the accompanying Budget Statement.

Tourism Special Fund:

1. \$67.9M in cash and investments



- a. Includes \$5M in Emergency Fund held as investments.
 - i. Approximately \$5.0M held in money market funds
 - ii. Further detail provided in the financial statements (as of June 2021)
- b. Cash from April 30, 2021 increased by approximately \$11.5M due to receiving \$21.5M in TAT, \$150K in contract revenue, \$58K in investment income, and \$38K in refunds that was offset by \$10.3M in expenditures during the two-month period ended June 30, 2021.

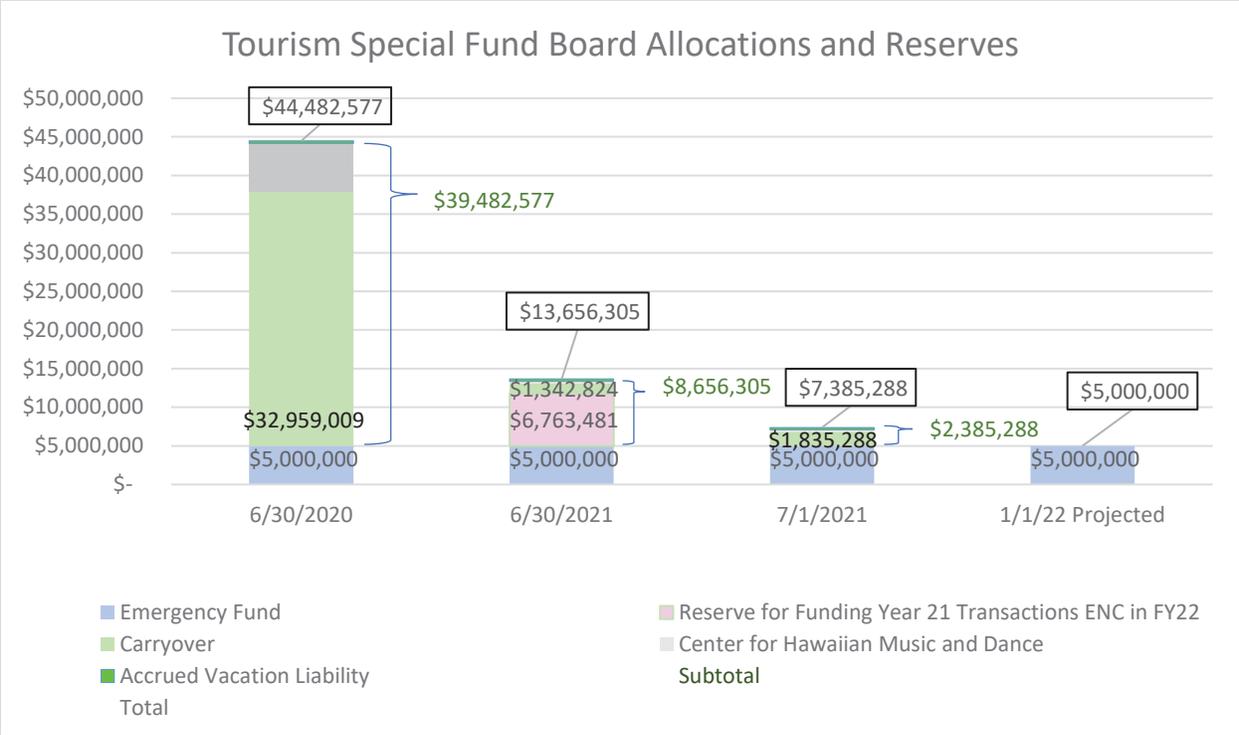
- c. Year-over-year, cash decreased by \$9.4M from \$77.3M at June 30, 2020. A significant decrease was anticipated as HTA used its reserves to fund the FY21 budget, partially offset by the impact of receiving the \$21.5M in TAT to encumber contracts that we do not anticipate paying out until FY22.

2. HTA's outstanding encumbrances are summarized as follows:

\$3.8M	Prior year encumbrances currently being spent down	
\$50.5M	Current year encumbrances remaining	
\$54.3M	Total encumbrances outstanding at June 30, 2021	

The \$3.8M in prior year encumbrances compares against a \$32.8M balance at the beginning of FY 2021, which included \$14.7M in encumbrances we anticipated cancelling heading into FY2021 – all of which have now been cancelled. Staff routinely makes a concerted effort to liquidate older encumbrances that should no longer be encumbered and that is reflected here. The \$50.5M in FY2021 encumbrances remaining is higher than it typically is at the end of the year due to the timing of encumbering contracts close to year-end, commensurate with the timing of the restart of the TAT distribution.

- 3. In addition to HTA's \$5M Emergency Fund, \$8.6M is reserved as Board allocations as of June 30, 2021. However, this balance is reduced to approximately \$2.3M on July 1, 2021 after taking into account the transactions processed in FY 2022 that were previously discussed. This compares to \$39.4M at the beginning of the fiscal year. (This \$39.4M included \$6.2M for the Center for Hawaiian Music & Dance.) A supporting schedule is also embedded in these financial statements to provide greater detail. These balances are comprised of the following:



Pursuant to Act 001, Special Session 2021 (HB 862), the Tourism Special Fund will be repealed on January 1, 2022. At that time, any unencumbered funds will return to the State’s General Fund, which we anticipate being approximately \$2.3M. This amount was slightly larger than we originally anticipated due to previously unforeseen reductions to several prior year encumbrances and the timing and process challenges of being able to redeploy those funds.

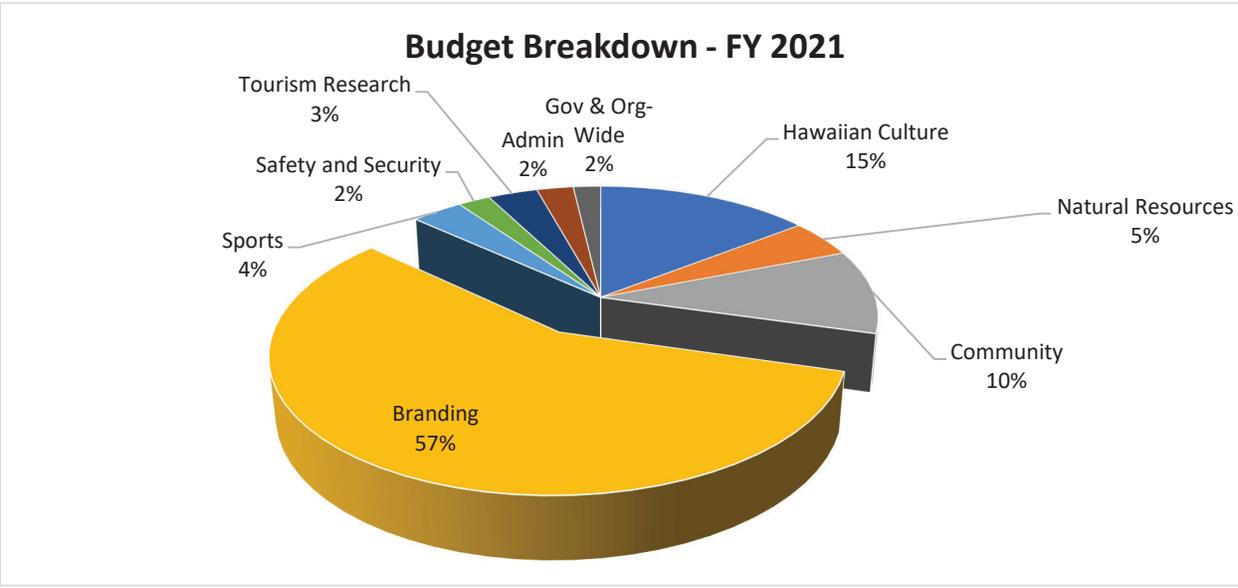
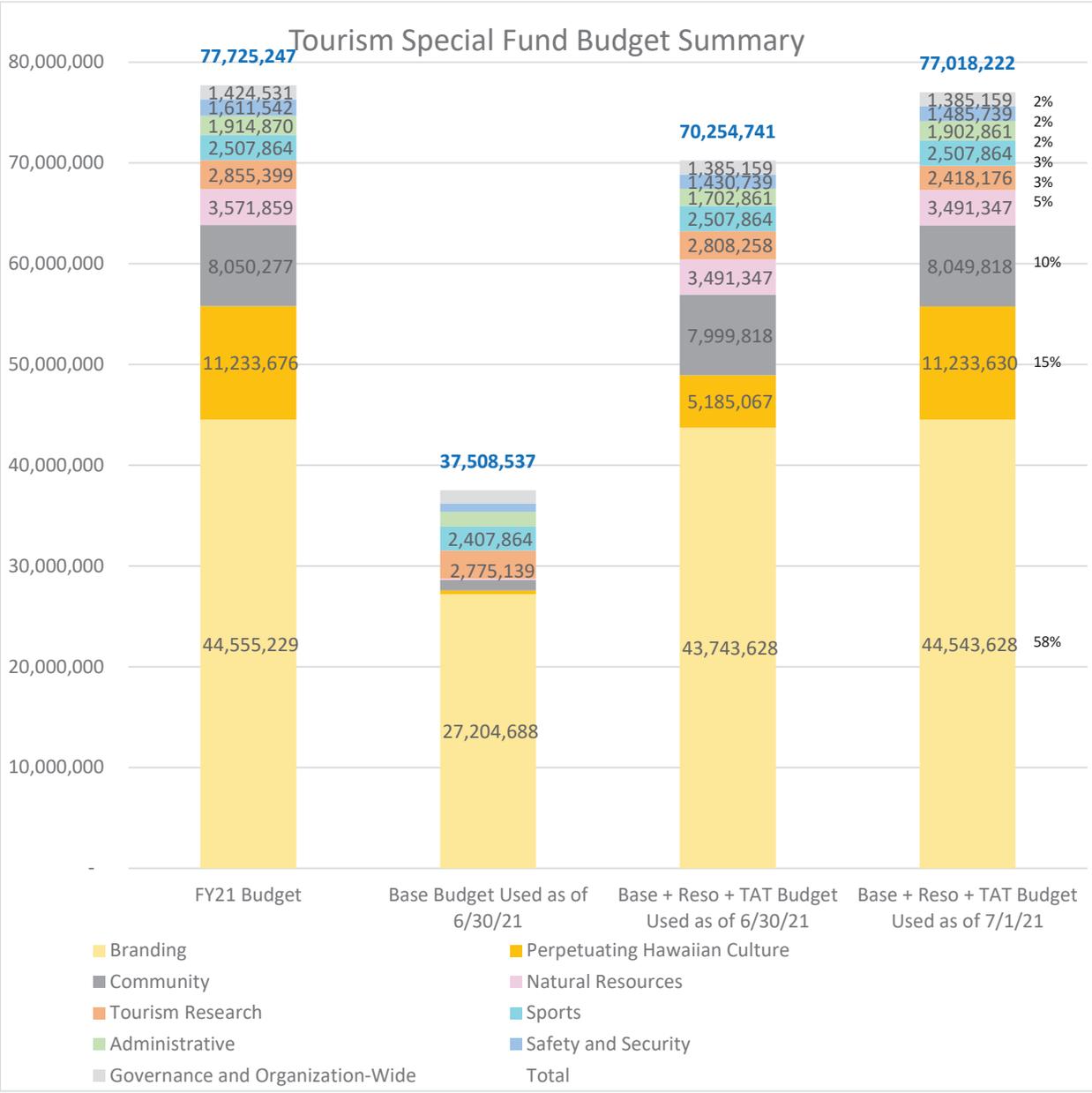
4. The HTA FY 2021 budget was amended as follows during the year:

Original FY21 Budget	48,674,688
Budget Amendment - December 2020 Meeting	(7,680,945)
Amended FY21 Budget (December 2020)	40,993,743
Budget Amendment - Board Reso 2021-2-1	15,226,947
Budget Amendment - TAT Restart Funds	21,504,557
Amended FY21 Budget (June 2021)	<u>77,725,247</u>

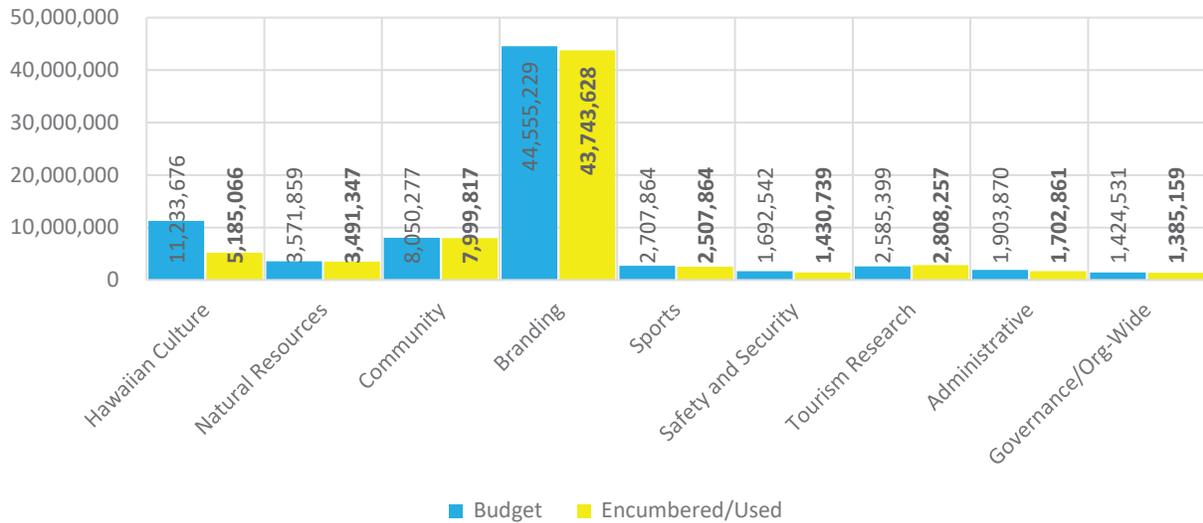
- a. The December 2020 budget amendment included a reduction to remove the use of HTA’s \$5 million Emergency Fund.
- b. At its May 2021 meeting, the HTA Board approved Resolution 2021-2-1 which authorized HTA staff to encumber intended contracts using funds previously reserved as HTA Board Allocations and other funds that could become available.

As a result of this, approximately \$18.4M of contracts were encumbered using the \$15.2M budget increase noted above and approximately \$3.2M of (at the time) unused funds from the \$41M FY21 budget.

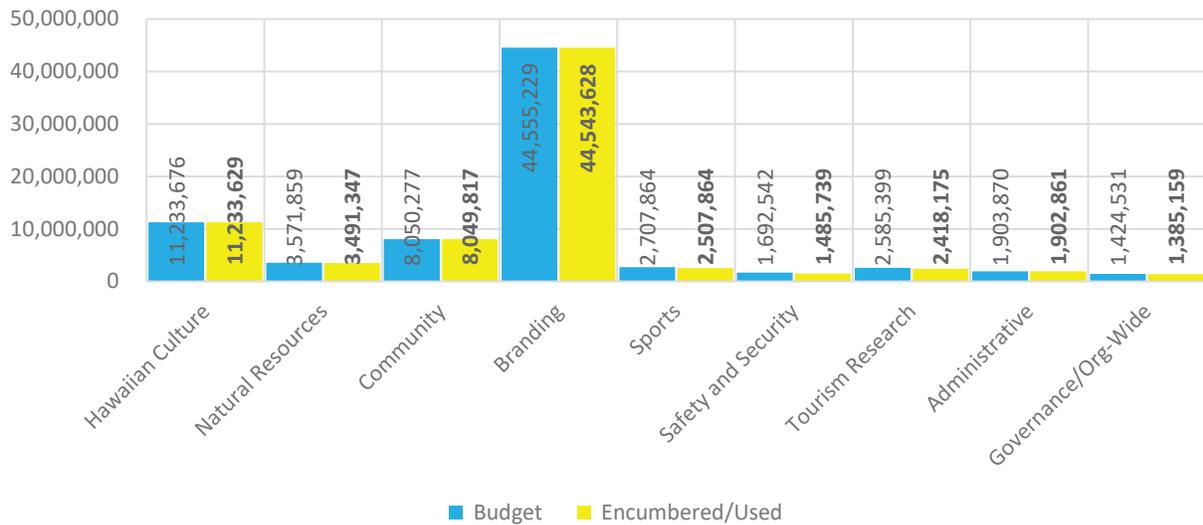
- c. In May 2020, HTA's TAT allocation under HRS 237d was suspended. In June 2021, the Governor restarted the TAT allocation resulting in \$21.5M deposited into HTA's fund.
 - d. These budget amendments were necessary to fund contract encumbrances that otherwise would have been subject to the availability of funding in FY2022. HTA's FY2022 funding is entirely comprised of Federal ARPA funds. As of June 2021, the use of ARPA funds for HTA's purposes remained uncertain. Accordingly, HTA made the appropriate budget amendments to use its Board-allocated reserves and TAT restart funding to focus on encumbering contracts for which we were uncertain of our ability to use ARPA funds, while we had the ability to do so in FY 2021. We were uncertain if we would be able to use ARPA funds for HTA's international branding contractors; accordingly, we prioritized encumbering those contracts via these budget amendments. HTA would not have had the ability to encumber these existing funds (in HTA's Tourism Special Fund) in FY 2022 as the legislative appropriations we received are only Federal ARPA funds.
 - e. This resulted in an ending FY21 budget of \$77.7M.
5. As of June 30, 2021, \$70.3M of the \$77.7M FY 2021 budget utilized/encumbered, or 90%. As of July 1, 2021, \$77M of the \$77.7M FY2021 budget was utilized/encumbered, or 99%. The following are various charts to depict our budget, budget utilization and trends.



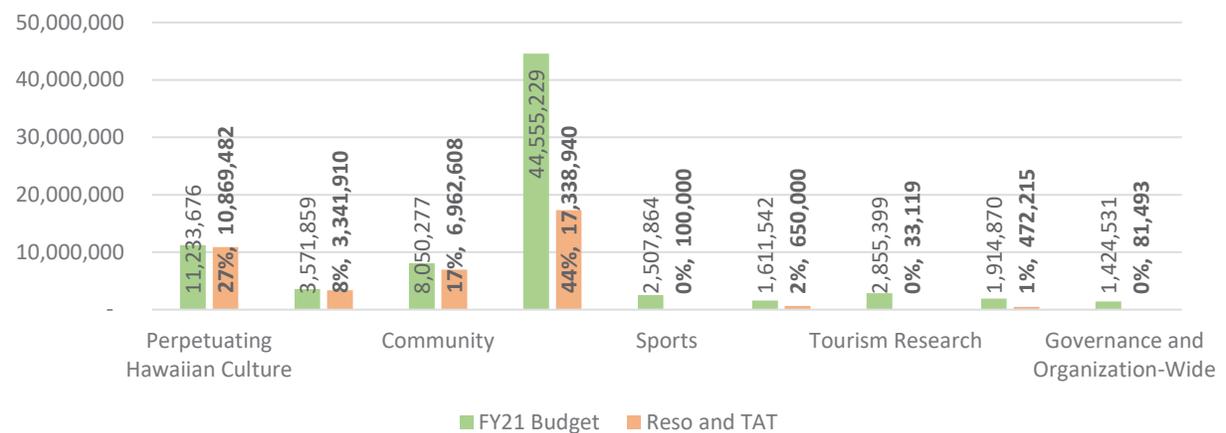
Budget vs Encumbered as of 06/30/21 (Budget Used)



Budget vs Encumbered as of 7/1/21 (Budget Used)



FY21 Budget vs. Reso and TAT



6. Numerous budget reallocations were made during May and June 2021 relating to the circumstances to encumber contracts before the end of FY 2021, described in the above budget amendment discussion. A detail of the reallocations made for the reporting period and cumulatively for the fiscal year are detailed on the accompanying Budget Reallocation Summary.

7. Operating Income (Loss):

a. HTA received \$21.5M in TAT in June 2021.

i. HTA's TAT allocation was suspended due to the COVID-19 pandemic, resulting in HTA not receiving the statutorily prescribed allocation from May 2020 through May 2021. The TAT reallocation was restarted for June 2021.

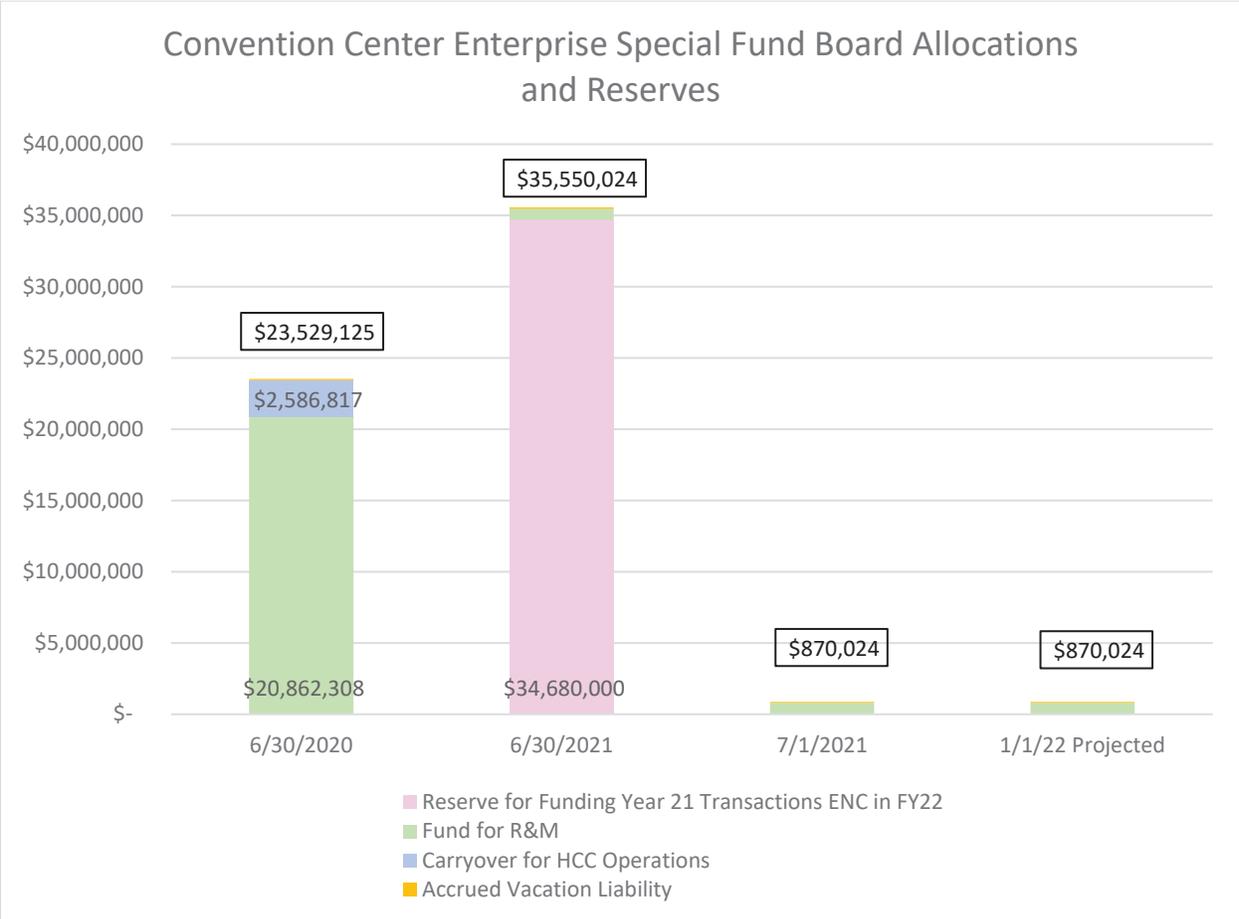
b. Other revenue received year-to-date is comprised of the following, which included \$58K in investment income, \$150K in contract revenue, and \$38.5K in refunds in the two-month period ended June 30, 2021:

Investment	470,790
Refunds on contracts	1,026,336
CARES Funding - VASH Flight Assistance (\$103,962 - \$3,484 returned	100,478
Contract revenue	150,765
	<u>1,748,369</u>

c. Incurred \$32.6M in expenditures YTD.

Convention Center Enterprise Special Fund:

- 8. \$36.8M in cash
 - a. Increase from April of \$9.7M due to recording \$16.5M in TAT, \$1.6M in HCC operating revenue, \$110K in miscellaneous revenue, and \$23K in investment income that was partially offset by \$8.5M in expenditures.
- 9. \$20.5M in cash with contractor or with DAGS, for R&M projects (as of June 2021).
 - a. Includes \$2M in Emergency R&M funds
 - b. These funds are encumbered or budgeted toward specific projects such as trellis replacement, house audio upgrades, ballroom gutter and transom glass repair, chiller replacement, exterior planter repairs, and various equipment purchases and upgrades. Of the \$20.5M, approximately \$5.8M has been contracted (as of June 2021).
 - c. The amount of cash remaining with the contractor already takes into account \$3.8M expended on current and future projects (in-progress costs or preliminary work).



10. \$35.5M reserved as Board allocations as of June 30, 2021, however this balance is reduced to approximately \$870K on July 1, 2021 after taking into account the transactions processed in FY 2022 that were previously discussed. This compares to a reserve balance of \$23.5M at the beginning of fiscal year 2021. The \$870K remains in the Convention Center Enterprise Special Fund (CCESF), however, HTA is currently unable to spend these funds due to not having an appropriation ceiling in FY 2022. HTA was appropriated \$11M in Federal ARPA funds (Act 88, HB200 State Budget Bill, 2021 Legislative Session), which is separate from the CCESF.

11. \$111K of prior year outstanding encumbrances currently being spent down.

12. Budget:

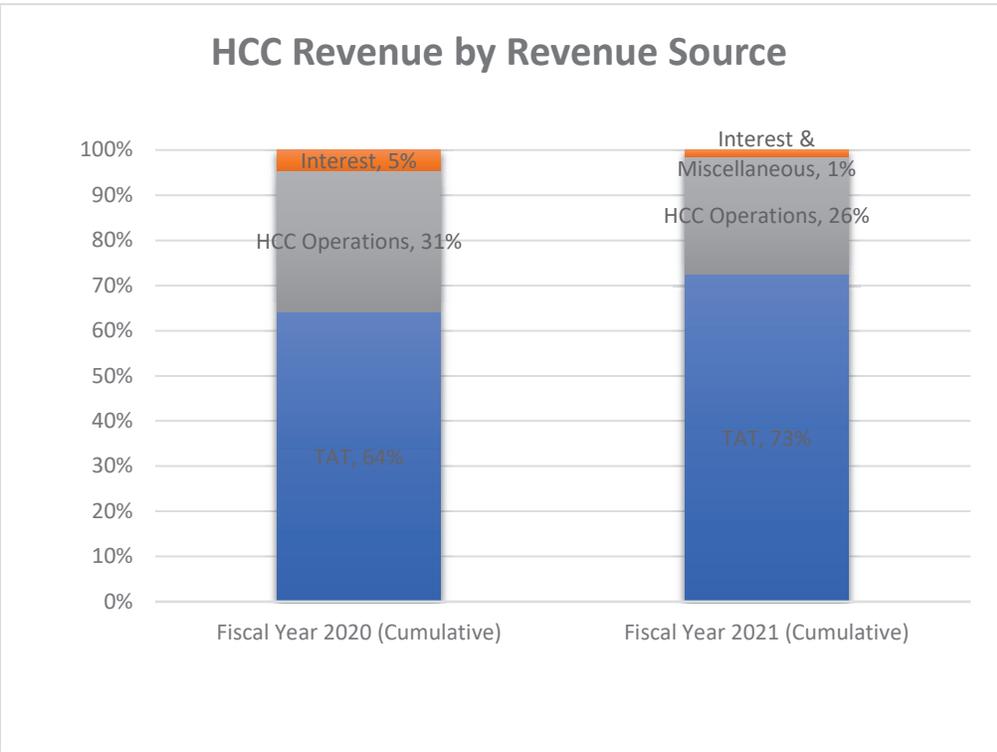
a. The following amendments to the CCESF budget were made during FY 2021:

Original FY21 Budget	7,542,390
Budget Amendment - Board Reso 2021-2-1	18,634,744
Budget Amendment - TAT Restart Funds	16,500,000
Amended FY21 Budget (June 2021)	<u>42,677,134</u>

- i. In May 2020, HTA’s TAT allocation under HRS 237d was suspended, resulting in the need for HTA to use the CCESF’s reserves to fund it’s original FY 2021 budget. In June 2021, the Governor restarted the TAT allocation resulting in \$16.5M deposited into HTA’s CCESF fund.
- ii. At its May 2021 meeting, the HTA Board approved Resolution 2021-2-1 which authorized HTA staff to encumber intended contracts using funds previously reserved as HTA Board Allocations and other funds that could become available.
- iii. HTA used the \$16.5M TAT and \$18.6M previously reserved as Board Allocations to fund AEG’s FY 2022 contract. Staff advised the Board of its intention to do so at the June 10, 2021 Board meeting, including to deploy reserve funds in an effort to ensure we maximize HCC’s ROI and efficiently use any time afforded during the pandemic to address major repair and maintenance. The \$16.5M and \$18.6M were encumbered as follows:

	FY22 HCC Operations - Encumbrance Funded with		
	TAT Restart Funds	Reserve / Board Reso Funds	Total
HCC Facility Operations Expenses	5,517,400	5,169,000	10,686,400
HCC Operating Contingency	-	2,500,000	2,500,000
HCC Local Sales	533,000	-	533,000
Major R&M (from TAT Restart funds)	10,129,600	-	10,129,600
Major R&M (from CCEF Reserves)	-	10,831,000	10,831,000
Property Insurance	320,000	100,000	420,000
	16,500,000	18,600,000	35,100,000

- b. \$16.5M in TAT was received in June 2021.
 - i. HTA's TAT allocation for the CCEF was suspended due to the COVID-19 pandemic, resulting in HTA not receiving the statutorily prescribed allocation from May 2020 through April 2021. The TAT reallocation was restarted for June 2021.



- c. \$7.5M of the \$42.6M budget used as of June 30, 2021 and \$42.2M used as of July 1, 2021, consistent with budget.
- d. The net impact of revenues and encumbrances resulted in utilizing \$24M of the CCESF's funds reserved as Board allocations and included funding the Convention Center's facility operations of \$3M. The \$3M was \$300K less than the \$3.3M budgeted.
- e. Revenue remitted to HTA in FY 2021 attributed to other State agencies utilizing space at the Convention Center include the following:

	State Agencies: Revenue Remittances to HTA in FY21		
	Related to FY21 Services	Related to FY20 Services	Total
DLIR	2,429,693.00	1,272,207.00	3,701,900.00
Office of Elections	938,053.00	-	938,053.00
DoH	736,492.00	-	736,492.00
Other	57,247.00	-	57,247.00
Total	4,161,485.00	1,272,207.00	5,433,692.00

Hawaii Tourism Authority

Balance Sheet

Tourism Special Fund

As of 6/30/21

	<u>Current Year</u>
Assets	
Current Assets	
Checking	62,938,894.26
Petty Cash	<u>5,000.00</u>
Total Current Assets	<u>62,943,894.26</u>
Total Assets	<u><u>62,943,894.26</u></u>
Fund Balance	
Encumbered Funds	
FY 2015 Funds	7,851.29
FY 2016 Funds	6,047.12
FY 2017 Funds	15,706.80
FY 2018 Funds	16,978.03
FY 2019 Funds	727,570.21
FY 2020 Funds	3,038,640.51
FY 2021 Funds	<u>50,474,795.12</u>
Total Encumbered Funds	<u>54,287,589.08</u>
Unencumbered Funds	
Total Unencumbered Funds	8,656,305.18
Total Fund Balance	<u><u>62,943,894.26</u></u>

Hawaii Tourism Authority
Balance Sheet
Convention Center Enterprise Special Fund
As of 6/30/21

	<u>Current Year</u>
Assets	
Current Assets	
Checking	36,811,904.21
Total Current Assets	<u>36,811,904.21</u>
Total Assets	<u><u>36,811,904.21</u></u>
Fund Balance	
Encumbered Funds	
FY 2019 Funds	110,894.39
FY 2021 Funds	1,150,985.70
Total Encumbered Funds	<u>1,261,880.09</u>
Unencumbered Funds	
Total Unencumbered Funds	35,550,024.12
Total Fund Balance	<u><u>36,811,904.21</u></u>

Hawaii Tourism Authority

Balance Sheet

Emergency Trust Fund

As of 6/30/21

	<u>Current Year</u>
Assets	
Current Assets	
Investments	5,018,959.08
Total Current Assets	<u>5,018,959.08</u>
 Total Assets	 <u><u>5,018,959.08</u></u>
 Fund Balance	
Current year net assets	
	13,166.82
Total Current year net assets	<u>13,166.82</u>
Prior years	
Total Prior years	5,005,792.26
 Total Fund Balance	 <u><u>5,018,959.08</u></u>

Hawaii Tourism Authority

Balance Sheet

Tourism Special Fund

As of 7/1/21

	<u>Current Year</u>
Assets	
Current Assets	
Checking	62,938,894.26
Petty Cash	<u>5,000.00</u>
Total Current Assets	<u>62,943,894.26</u>
Total Assets	<u><u>62,943,894.26</u></u>
Fund Balance	
Encumbered Funds	
FY 2015 Funds	7,851.29
FY 2016 Funds	6,047.12
FY 2017 Funds	15,706.80
FY 2018 Funds	4,137.03
FY 2019 Funds	577,570.21
FY 2020 Funds	2,709,017.51
FY 2021 Funds	<u>57,238,276.19</u>
Total Encumbered Funds	60,558,606.15
Unencumbered Funds	
Total Unencumbered Funds	2,385,288.11
Total Fund Balance	<u><u>62,943,894.26</u></u>

Hawaii Tourism Authority
Balance Sheet
Convention Center Enterprise Special Fund
As of 7/1/21

	Current Year
Assets	
Current Assets	
Checking	36,811,904.21
Total Current Assets	36,811,904.21
Total Assets	36,811,904.21
 Fund Balance	
Encumbered Funds	
FY 2019 Funds	110,894.39
FY 2021 Funds	35,830,985.70
Total Encumbered Funds	35,941,880.09
Unencumbered Funds	
Total Unencumbered Funds	870,024.12
 Total Fund Balance	36,811,904.21

	6/30/2020	6/30/2021	7/1/2021	Projected 1/1/2022	6/30/2020	6/30/2021	7/1/2021	Projected 1/1/2022
Emergency Fund	5,000,000	5,000,000	5,000,000	5,000,000				
Reserve for Funding Year 21 Transactions Enc in FY22	-	6,763,481	-	-	-	34,680,000	-	-
Carryover	32,959,009	1,342,824	1,835,288	-	2,586,817	-	-	-
Center for Hawaiian Music & Dance	6,198,568	250,000	250,000	-	20,862,308	790,024	790,024	790,024
Accrued Vacation Liability	325,000	300,000	300,000	-	80,000	80,000	80,000	80,000
Total Board Allocations (incl \$5M Emerg Fund)	44,482,577	13,656,305	7,385,288	5,000,000	23,529,125	35,550,024	870,024	870,024

Hawaii Tourism Authority
Statement of Revenues and Expenditures
Tourism Special Fund
FY21 Funds
From 5/1/2021 Through 6/30/2021

	Total Budget	Current Period Actual	Current Year Actual	Total Budget Variance
Revenue				
Transient Accomodations Tax	21,500,000.00	21,504,557.45	21,504,557.45	4,557.45
Interest and Dividends	0.00	35,150.47	35,150.47	35,150.47
Miscellaneous	0.00	146,465.94	250,427.94	250,427.94
Refunds	0.00	(59,106.90)	987,841.83	987,841.83
Total Revenue	<u>21,500,000.00</u>	<u>21,627,066.96</u>	<u>22,777,977.69</u>	<u>1,277,977.69</u>
Expense				
Perpetuating Hawaiian Culture	11,233,676.00	149,356.01	342,247.15	10,891,428.85
Natural Resources	3,571,859.00	42,958.00	149,437.03	3,422,421.97
Community	8,050,277.00	75,541.87	423,967.27	7,626,309.73
Branding	44,555,229.00	7,803,977.78	12,464,835.10	32,090,393.90
Sports	2,507,864.00	492,211.00	2,365,642.00	142,222.00
Safety and Security	1,611,542.00	72,661.87	749,703.29	861,838.71
Tourism Research	2,855,399.00	341,432.72	989,557.28	1,865,841.72
Administrative	1,914,870.00	195,553.46	1,111,071.45	803,798.55
Governance and Organization-Wide	1,424,531.00	180,753.76	1,183,482.81	241,048.19
Total Expense	<u>77,725,247.00</u>	<u>9,354,446.47</u>	<u>19,779,943.38</u>	<u>57,945,303.62</u>
Net Income	<u>(56,225,247.00)</u>	<u>12,272,620.49</u>	<u>2,998,034.61</u>	<u>59,223,281.31</u>

Hawaii Tourism Authority
Statement of Revenues and Expenditures
Convention Center Enterprise Special Fund
FY21 Funds
From 5/1/2021 Through 6/30/2021

	Total Budget	Current Period Actual	Current Year Actual	Total Budget Variance
Revenue				
Transient Accomodations Tax	16,500,000.00	16,500,000.00	16,500,000.00	0.00
Interest and Dividends	0.00	11,539.77	11,539.77	11,539.77
Miscellaneous	0.00	104,342.44	104,342.44	104,342.44
HCC Revenue	4,188,144.00	1,150,063.59	4,658,746.92	470,602.92
Total Revenue	<u>20,688,144.00</u>	<u>17,765,945.80</u>	<u>21,274,629.13</u>	<u>586,485.13</u>
Expense				
Branding	76,650.00	4,732.64	70,569.37	6,080.63
Administrative	274,580.00	46,415.34	237,267.84	37,312.16
HCC Operating Expense	20,705,657.00	6,194,681.39	7,413,863.94	13,291,793.06
HCC Repair and Maintenance	22,960,600.00	2,000,000.00	2,000,000.00	20,960,600.00
HCC Sales and Marketing / MFF	1,889,157.00	186,312.00	1,037,370.00	851,787.00
Governance and Organization-Wide	958,634.00	18,589.30	267,830.53	690,803.47
Total Expense	<u>46,865,278.00</u>	<u>8,450,730.67</u>	<u>11,026,901.68</u>	<u>35,838,376.32</u>
Net Income	<u>(26,177,134.00)</u>	<u>9,315,215.13</u>	<u>10,247,727.45</u>	<u>36,424,861.45</u>

Hawaii Tourism Authority
Statement of Revenues and Expenditures
Prior Year Funds - Tourism Special Fund
From 5/1/2021 Through 6/30/2021

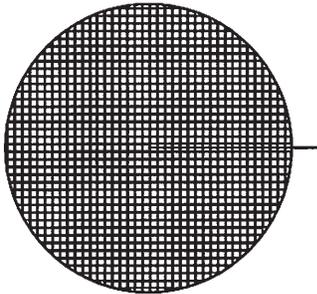
	Total Budget	Current Period Actual	Current Year Actual	Total Budget Variance
Revenue				
Interest and Dividends	0.00	23,546.05	435,640.34	435,640.34
Miscellaneous	0.00	815.00	815.00	815.00
Refunds	0.00	38,493.50	38,493.50	38,493.50
Total Revenue	<u>0.00</u>	<u>62,854.55</u>	<u>474,948.84</u>	<u>474,948.84</u>
Expense				
Perpetuating Hawaiian Culture	2,673,431.42	270,160.40	1,589,384.88	1,084,046.54
Natural Resources	1,282,200.00	33,700.00	1,097,682.43	184,517.57
Community	2,381,173.21	63,141.00	660,751.86	1,720,421.35
Branding	21,213,138.80	250,000.00	6,784,836.85	14,428,301.95
Sports	434,671.22	0.00	266,733.00	167,938.22
Safety and Security	1,433,403.12	33,366.53	773,580.58	659,822.54
Tourism Research	2,709,523.93	347,326.21	1,453,784.44	1,255,739.49
Administrative	605,544.63	(2,657.11)	211,279.24	394,265.39
Governance and Organization-Wide	63,171.50	60.21	58,276.09	4,895.41
Total Expense	<u>32,796,257.83</u>	<u>995,097.24</u>	<u>12,896,309.37</u>	<u>19,899,948.46</u>
Net Income	<u>(32,796,257.83)</u>	<u>(932,242.69)</u>	<u>(12,421,360.53)</u>	<u>20,374,897.30</u>

Hawaii Tourism Authority
Statement of Revenues and Expenditures
Prior Year Funds - Convention Center Enterprise Special Fund
From 5/1/2021 Through 6/30/2021

	<u>Total Budget</u>	<u>Current Period Actual</u>	<u>Current Year Actual</u>	<u>Total Budget Variance</u>
Revenue				
Interest and Dividends	0.00	11,048.92	194,726.94	194,726.94
Miscellaneous	0.00	5,836.20	5,836.20	5,836.20
HCC Revenue	<u>0.00</u>	<u>0.00</u>	<u>1,272,207.00</u>	<u>1,272,207.00</u>
Total Revenue	<u>0.00</u>	<u>16,885.12</u>	<u>1,472,770.14</u>	<u>1,472,770.14</u>
Expense				
HCC Operating Expense	1,736,916.67	0.00	1,433,517.00	303,399.67
HCC Sales and Marketing / MFF	1,245,908.83	0.00	0.00	1,245,908.83
Governance and Organization-Wide	51,917.03	0.00	32,750.00	19,167.03
Total Expense	<u>3,034,742.53</u>	<u>0.00</u>	<u>1,466,267.00</u>	<u>1,568,475.53</u>
Net Income	<u>(3,034,742.53)</u>	<u>16,885.12</u>	<u>6,503.14</u>	<u>3,041,245.67</u>

Summary Of Investments

Investment Allocation



0.0%	CASH	41.91
100.0%	CASH EQUIVALENTS	5,017,900.05
100.0%	TOTAL	5,017,941.96

Investment Summary

	Market Value	%	Estimated Income	Current Yield
CASH	41.91	0.00	0	0.00
CASH EQUIVALENTS	5,017,900.05	100.00	502	0.01
Total Fund	5,017,941.96	100.00	502	0.01

Schedule Of Investments

UNITS	DESCRIPTION	BOOK VALUE	MARKET VALUE	% OF CATEGORY
	CASH	41.91	41.91	100.00
	CASH EQUIVALENTS			
	CASH MANAGEMENT			
5,017,900.05	DREYFUS TREASURY OBLIGATIONS CASH MANAGEMENT FUND	5,017,900.05	5,017,900.05	100.00
	Total Fund	5,017,941.96*	5,017,941.96*	100.00*

Hawaii Convention Center
Facility
Income Statement
From 6/01/2021 Through 6/30/2021
(In Whole Numbers)

	Current Month Actual	Current Month Budget	Variance	Current Month Prior Year	YTD Actual	YTD Budget	Variance	YTD Prior Year
Direct Event Income								
Rental Income (Net)	211,605	177,087	34,518	335,400	989,229	908,236	80,993	1,300,441
Service Revenue	202,710	68,768	133,942	188,325	895,543	465,126	430,417	819,520
Total Direct Event Income	414,315	245,855	168,460	523,725	1,884,772	1,373,362	511,410	2,119,961
Direct Service Expenses	176,668	124,285	(52,383)	172,795	835,733	747,010	(88,723)	905,133
Net Direct Event Income	237,647	121,570	116,077	350,930	1,049,039	626,352	422,687	1,214,828
Ancillary Income								
Food and Beverage (Net)	29,383	171,021	(141,638)	121,409	72,986	453,588	(380,602)	1,342,843
Event Parking (Net)	5,091	5,248	(157)	10,927	20,844	15,932	4,912	203,855
Electrical Services	0	0	0	0	0	0	0	33,001
Audio Visual	8,890	4,000	4,890	1,061	15,316	13,100	2,216	45,105
Internet Services	0	0	0	0	0	0	0	0
Rigging Services	6,170	0	6,170	0	6,170	200	5,970	22,502
First Aid Commissions	0	0	0	0	0	0	0	0
Total Ancillary Income	49,534	180,269	(130,735)	133,397	115,316	482,820	(367,504)	1,647,306
Total Event Income	287,181	301,839	(14,658)	484,326	1,164,355	1,109,172	55,183	2,862,133
Other Operating Income								
Non-Event Parking	0	0	0	0	25	0	25	12,853
Other Income	3,444	1,417	2,027	16,608	9,384	8,502	882	60,030
Total Other Operating Income	3,444	1,417	2,027	16,608	9,409	8,502	907	72,882
Total Gross Income	290,625	303,256	(12,632)	500,934	1,173,764	1,117,674	56,090	2,935,016
Net Salaries & Benefits								
Salaries & Wages	257,976	268,050	10,074	227,271	1,492,820	1,609,048	116,228	1,966,706
Payroll Taxes & Benefits	6,209	92,842	86,633	70,994	516,847	557,052	40,205	607,553
Labor Allocations to Events	(137,402)	(122,460)	14,942	(162,177)	(733,808)	(724,290)	9,518	(582,948)
Total Net Salaries & Benefits	126,783	238,432	111,649	136,089	1,275,858	1,441,810	165,952	1,991,312
Other Indirect Expenses								
Net Contracted Services	30,941	24,816	(6,125)	25,251	131,212	147,816	16,604	168,777
Operations	4,000	7,584	3,584	5,394	33,712	45,504	11,792	52,883
Repair & Maintenance	77,292	64,384	(12,908)	59,168	375,939	386,304	10,365	291,159
Operational Supplies	9,504	25,401	15,897	18,525	60,912	128,961	68,049	178,596
Insurance	8,747	10,555	1,808	9,704	54,560	55,809	1,249	68,367
Utilities	154,344	132,913	(21,431)	139,310	765,206	894,970	129,764	919,690
Meetings & Conventions	495	750	255	0	5,032	4,350	(682)	5,456
Promotions & Communications	2,311	2,300	(11)	9,075	5,029	13,800	8,771	39,234
General & Administrative	1,418	12,545	11,127	6,197	37,761	72,713	34,952	80,231
Management Fees	0	18,633	18,633	18,232	0	111,798	111,798	109,406
Other	20,577	2,166	(18,411)	0	124,415	12,996	(111,419)	152,131
Total Other Indirect	309,629	302,047	(7,582)	290,855	1,593,777	1,875,021	281,244	2,065,930
Net Income (Loss) before CIP Funded Expenses	(145,787)	(237,223)	91,435	73,990	(1,695,872)	(2,199,157)	503,285	(1,122,226)
CIP Funded Expenses	19,435	0	19,435	2,202	119,680	0	119,680	150,692
Net Income (Loss) from Operations	(126,352)	(237,223)	110,870	76,192	(1,576,192)	(2,199,157)	622,965	(971,534)
Fixed Asset Purchases	13,772	4,167	(9,605)	0	20,859	25,002	4,143	34,703
Net Income (Loss) After Fixed Asset Purchases	(140,124)	(241,390)	101,266	76,192	(1,597,051)	(2,224,159)	627,108	(1,006,237)

Hawaii Convention Center
Facility
Income Statement
From 6/01/2021 Through 6/30/2021
(In Whole Numbers)

	Current Month Actual	Current Month Budget	Variance	Current Month Prior Year	YTD Actual	YTD Budget	Variance	YTD Prior Year
Revenues								
Food & Beverage	53,818	281,920	(228,102)	165,869	135,268	748,090	(612,822)	2,304,366
Facility	438,937	258,272	180,665	552,320	1,941,757	1,416,414	525,343	2,521,450
Total Revenues	492,755	540,192	(47,437)	718,189	2,077,025	2,164,504	(87,479)	4,825,816
Expenses								
Food & Beverage	56,891	166,192	109,301	100,700	248,302	595,112	346,811	1,562,464
Facility	581,651	611,223	29,572	543,499	3,524,595	3,768,549	243,954	4,385,578
Total Expenses	638,542	777,415	138,872	644,199	3,772,897	4,363,661	590,765	5,948,042
Net Income (Loss) before CIP Funded Expenses	(145,787)	(237,223)	91,435	73,990	(1,695,872)	(2,199,157)	503,285	(1,122,226)
CIP Funded Expenses	19,435	0	19,435	2,202	119,680	0	119,680	150,692
Net Income (Loss) from Operations	(126,352)	(237,223)	110,870	76,192	(1,576,192)	(2,199,157)	622,965	(971,534)
Fixed Asset Purchases	13,772	4,167	(9,605)	0	20,859	25,002	4,143	34,703
Net Income (Loss) after Fixed Asset Purchases	(140,124)	(241,390)	101,265	76,192	(1,597,051)	(2,224,159)	627,108	(1,006,237)

Hawaii Convention Center
Sales and Marketing
Income Statement
From 6/1/2021 Through 6/30/2021
(In Whole Numbers)

	Current Month Actual	Current Month Budget	Variance	Current Month Prior Year	YTD Actual	YTD Budget	Variance	YTD Prior Year
Other Operating Income								
Other Income	0	0	0	10	0	0	0	256
Total Other Operating Income	0	0	0	10	0	0	0	256
Total Gross Income	0	0	0	10	0	0	0	256
Net Salaries & Benefits								
Salaries & Wages	16,227	22,108	5,881	11,196	104,276	132,648	28,372	201,449
Payroll Taxes & Benefits	192	6,852	6,660	2,821	24,269	41,102	16,833	47,564
Total Net Salaries & Benefits	16,419	28,960	12,541	14,017	128,545	173,750	45,205	249,013
Other Indirect Expenses								
Net Contracted Services	0	0	0	0	0	0	0	0
Repair & Maintenance	5,319	5,517	198	5,365	31,914	33,102	1,188	34,688
Utilities	253	300	47	294	1,518	1,800	282	2,367
Meetings & Conventions								
Mileage	0	0	0	0	0	0	0	0
Meals & Entertainment	0	208	208	0	0	1,248	1,248	326
Meetings & Conventions	0	0	0	0	(694)	0	694	237
Dues & Subscriptions	0	83	83	0	755	-198	(257)	-117
Total Meetings & Conventions	0	291	291	0	61	1,746	1,685	980
Promotions & Communications								
Site Visit	0	0	0	0	0	0	0	0
Photography	425	2,750	2,325	0	1,848	2,750	902	79
Advertising	0	1,667	1,667	0	0	10,002	10,002	1,047
Web Development & Maint	275	3,725	3,450	340	4,888	22,350	17,462	9,965
Market Research	0	0	0	0	0	0	0	0
Promotional	2,010	6,250	4,240	0	2,010	12,500	10,490	(1,264)
Attendance Promotion	0	0	0	0	0	0	0	(528)
Global Outreach	0	0	0	0	0	0	0	0
Total Promotions & Comm	2,710	14,392	11,682	340	8,747	47,602	38,855	9,298
Marketing Flexibility Fund	0	0	0	0	0	0	0	0
General & Administrative	526	708	182	5	2,448	4,248	1,800	2,095
Management Fees	0	0	0	0	0	0	0	0
Other	1,047	1,266	219	1,047	6,283	7,596	1,313	10,471
Total Other Indirect Expenses	9,855	22,474	12,619	7,051	50,971	96,094	45,123	59,899
Net Income (Loss) from Operations	(26,274)	(51,434)	25,160	(21,057)	(179,516)	(269,844)	90,328	(308,656)
Fixed Asset Purchases	0	0	0	0	0	0	0	0
Net Income (Loss) After Fixed Asset Purchases	(26,274)	(51,434)	25,160	(21,057)	(179,516)	(269,844)	90,328	(308,656)

Hawaii Tourism Authority
Budget Statement - Summary
FY 2021
July 1, 2020 through July 1, 2021 (Unofficial)

Category	Tourism Special Fund				Convention Center Enterprise Special Fund			
	Fiscal Year 2021				Fiscal Year 2021			
	Budget	(Unofficial) YTD Amount of Budget Used	Balance	Activity for July 1, 2021	Budget	(Unofficial) YTD Amount of Budget Used	Balance	Activity for July 1, 2021
Revenues								
TAT Revenue Allocation	21,500,000	21,504,557	(4,557)	-	16,500,000	16,500,000	-	-
Prior Year Carryover	56,186,728	-	56,186,728	-	26,177,134	-	26,177,134	-
Availability of \$5M Emergency Fund (Subject to Governor Approval)	-	-	-	-	-	-	-	-
Other	33,962	1,748,369	(1,714,407)	-	-	1,588,651	(1,588,651)	-
	<u>77,720,690</u>	<u>23,252,926</u>	<u>54,467,764</u>	<u>-</u>	<u>42,677,134</u>	<u>18,088,651</u>	<u>24,588,483</u>	<u>-</u>
Expenditures								
Perpetuating Hawaiian Culture								
Hawaiian Culture Programs	11,036,260	11,036,214	46	6,048,563	-	-	-	-
In-House Contracted Staff - Hawaiian Culture	-	-	-	-	-	-	-	-
State Employee Salaries - Hawaiian Culture	197,416	197,416	-	-	-	-	-	-
Subtotal	<u>11,233,676</u>	<u>11,233,630</u>	<u>46</u>	<u>6,048,563</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Natural Resources (Statute: \$1M minimum)								
Natural Resources Programs	3,465,109	3,428,509	36,600	-	-	-	-	-
In-House Contracted Staff - Natural Resources	83,000	39,088	43,912	-	-	-	-	-
State Employee Salaries - Natural Resources	23,750	23,750	-	-	-	-	-	-
Subtotal	<u>3,571,859</u>	<u>3,491,347</u>	<u>80,512</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Community								
Community Programs	7,881,498	7,881,039	459	50,000	-	-	-	-
In-House Contracted Staff - Community	-	-	-	-	-	-	-	-
State Employee Salaries - Community	168,779	168,779	-	-	-	-	-	-
Subtotal	<u>8,050,277</u>	<u>8,049,818</u>	<u>459</u>	<u>50,000</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Branding								
Branding Programs	43,982,441	43,970,840	11,601	800,000	-	-	-	-
In-House Contracted Staff - Branding	-	-	-	-	-	-	-	-
State Employee Salaries - Branding	572,788	572,788	-	-	76,650	76,649	1	-
Subtotal	<u>44,555,229</u>	<u>44,543,628</u>	<u>11,601</u>	<u>800,000</u>	<u>76,650</u>	<u>76,649</u>	<u>1</u>	<u>-</u>
Sports								
Sports Programs	2,507,864	2,507,864	-	-	-	-	-	-
Subtotal	<u>2,507,864</u>	<u>2,507,864</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Safety and Security								
Safety and Security Programs	1,611,542	1,485,739	125,803	55,000	-	-	-	-
Subtotal	<u>1,611,542</u>	<u>1,485,739</u>	<u>125,803</u>	<u>55,000</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Tourism Research								
Tourism Research Programs	2,405,119	1,967,897	437,222	(390,082)	-	-	-	-
In-House Contracted Staff - Tourism Research	-	-	-	-	-	-	-	-
State Employee Salaries - Tourism Research	450,280	450,279	1	-	-	-	-	-
Subtotal	<u>2,855,399</u>	<u>2,418,176</u>	<u>437,223</u>	<u>(390,082)</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Hawai'i Convention Center								
Sales & Marketing	-	-	-	-	1,889,157	1,889,157	-	533,000
Operations	-	-	-	-	16,517,513	16,160,810	356,703	13,186,400
Major Repair & Maintenance	-	-	-	-	22,960,600	22,960,600	-	20,960,600
Subtotal	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>41,367,270</u>	<u>41,010,567</u>	<u>356,703</u>	<u>34,680,000</u>
Administrative (Statute: Cannot exceed 3.5% = \$2,765,000)								
Operations	885,196	873,187	12,009	200,000	-	-	-	-
In-House Contracted Staff - Admin	-	-	-	-	-	-	-	-
State Employee Salaries - Admin	1,029,674	1,029,674	-	-	274,580	256,717	17,863	-
Subtotal	<u>1,914,870</u>	<u>1,902,861</u>	<u>12,009</u>	<u>200,000</u>	<u>274,580</u>	<u>256,717</u>	<u>17,863</u>	<u>-</u>
Organizationwide Costs								
State Employee Fringe	1,122,355	1,120,894	1,461	-	198,634	118,508	80,126	-
Organization-Wide	189,000	162,618	26,382	-	760,000	736,699	23,301	-
Governance - Board/Others	113,176	101,647	11,529	-	-	-	-	-
Subtotal	<u>1,424,531</u>	<u>1,385,159</u>	<u>39,372</u>	<u>-</u>	<u>958,634</u>	<u>855,207</u>	<u>103,427</u>	<u>-</u>
Total Expenditures	<u>77,725,247</u>	<u>77,018,222</u>	<u>707,025</u>	<u>6,763,481</u>	<u>42,677,134</u>	<u>42,199,140</u>	<u>477,994</u>	<u>34,680,000</u>
Revenues vs Expenditures	<u>(4,557)</u>	<u>(53,765,296)</u>			<u>-</u>	<u>(24,110,489)</u>		
Administrative Cap (3.5%, HRS 201B-11)	2,765,000	2,765,000						
HTA's Budgeted/Actual Administrative Costs (applying AG Definition)	<u>1,914,870</u>	<u>1,902,861</u>	2.4%	2.4%				
	850,130	862,139						

Hawaii Tourism Authority
Budget Statement - Summary
FY 2021
As of June 30, 2021 (Official Records)

Category	Tourism Special Fund				Convention Center Enterprise Special Fund			
	Budget	YTD Amount of Budget Used	Balance	Activity for May-June 2021	Budget	YTD Amount of Budget Used	Balance	Activity for May-June 2021
Revenues								
TAT Revenue Allocation	21,500,000	21,504,557	(4,557)	21,504,557	16,500,000	16,500,000	-	16,500,000
Prior Year Carryover	56,186,728	-	56,186,728	-	26,177,134	-	26,177,134	-
Availability of \$5M Emergency Fund (Subject to Governor Approval)	-	-	-	-	-	-	-	-
Other	33,962	1,748,369	(1,714,407)	185,364	-	1,588,651	(1,588,651)	132,767
	<u>77,720,690</u>	<u>23,252,926</u>	<u>54,467,764</u>	<u>21,689,921</u>	<u>42,677,134</u>	<u>18,088,651</u>	<u>24,588,483</u>	<u>16,632,767</u>
Expenditures								
Perpetuating Hawaiian Culture								
Hawaiian Culture Programs	11,036,260	4,987,651	6,048,609	4,810,384	-	-	-	-
In-House Contracted Staff - Hawaiian Culture	-	-	-	-	-	-	-	-
State Employee Salaries - Hawaiian Culture	197,416	197,416	-	(17,923)	-	-	-	-
Subtotal	<u>11,233,676</u>	<u>5,185,067</u>	<u>6,048,609</u>	<u>4,792,461</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Natural Resources (Statute: \$1M minimum)								
Natural Resources Programs	3,465,109	3,428,509	36,600	3,336,910	-	-	-	-
In-House Contracted Staff - Natural Resources	83,000	39,088	43,912	(43,912)	-	-	-	-
State Employee Salaries - Natural Resources	23,750	23,750	-	(1,834)	-	-	-	-
Subtotal	<u>3,571,859</u>	<u>3,491,347</u>	<u>80,512</u>	<u>3,291,164</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Community								
Community Programs	7,881,498	7,831,039	50,459	7,517,103	-	-	-	-
In-House Contracted Staff - Community	-	-	-	-	-	-	-	-
State Employee Salaries - Community	168,779	168,779	-	21,659	-	-	-	-
Subtotal	<u>8,050,277</u>	<u>7,999,818</u>	<u>50,459</u>	<u>7,538,762</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Branding								
Branding Programs	43,982,441	43,170,840	811,601	16,500,000	-	-	-	-
In-House Contracted Staff - Branding	-	-	-	-	-	-	-	-
State Employee Salaries - Branding	572,788	572,788	-	64,140	76,650	76,649	1	6,649
Subtotal	<u>44,555,229</u>	<u>43,743,628</u>	<u>811,601</u>	<u>16,564,140</u>	<u>76,650</u>	<u>76,649</u>	<u>1</u>	<u>6,649</u>
Sports								
Sports Programs	2,507,864	2,507,864	-	100,000	-	-	-	-
Subtotal	<u>2,507,864</u>	<u>2,507,864</u>	<u>-</u>	<u>100,000</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Safety and Security								
Safety and Security Programs	1,611,542	1,430,739	180,803	524,198	-	-	-	-
Subtotal	<u>1,611,542</u>	<u>1,430,739</u>	<u>180,803</u>	<u>524,198</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Tourism Research								
Tourism Research Programs	2,405,119	2,357,979	47,140	335,829	-	-	-	-
In-House Contracted Staff - Tourism Research	-	-	-	-	-	-	-	-
State Employee Salaries - Tourism Research	450,280	450,279	1	66,099	-	-	-	-
Subtotal	<u>2,855,399</u>	<u>2,808,258</u>	<u>47,141</u>	<u>401,928</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
Hawai'i Convention Center								
Sales & Marketing	-	-	-	-	1,889,157	1,356,157	533,000	-
Operations	-	-	-	-	16,517,513	2,974,410	13,543,103	(1,150,064)
Major Repair & Maintenance	-	-	-	-	22,960,600	2,000,000	20,960,600	-
Subtotal	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>41,367,270</u>	<u>6,330,567</u>	<u>35,036,703</u>	<u>(1,150,064)</u>
Administrative (Statute: Cannot exceed 3.5% = \$2,765,000)								
Operations	885,196	673,187	212,009	253,457	-	-	-	-
In-House Contracted Staff - Admin	-	-	-	-	-	-	-	-
State Employee Salaries - Admin	1,029,674	1,029,674	-	9,446	274,580	256,717	17,863	7,212
Subtotal	<u>1,914,870</u>	<u>1,702,861</u>	<u>212,009</u>	<u>262,903</u>	<u>274,580</u>	<u>256,717</u>	<u>17,863</u>	<u>7,212</u>
Organizationwide Costs								
State Employee Fringe	1,122,355	1,120,894	1,461	(215,571)	198,634	118,508	80,126	(70,912)
Organization-Wide	189,000	162,618	26,382	57,618	760,000	736,699	23,301	578,412
Governance - Board/Others	113,176	101,647	11,529	8,471	-	-	-	-
Subtotal	<u>1,424,531</u>	<u>1,385,159</u>	<u>39,372</u>	<u>(149,482)</u>	<u>958,634</u>	<u>855,207</u>	<u>103,427</u>	<u>507,500</u>
Total Expenditures	<u>77,725,247</u>	<u>70,254,741</u>	<u>7,470,506</u>	<u>33,326,074</u>	<u>42,677,134</u>	<u>7,519,140</u>	<u>35,157,994</u>	<u>(628,703)</u>
Revenues vs Expenditures	<u>(4,557)</u>	<u>(47,001,815)</u>			<u>-</u>	<u>10,569,511</u>		
Administrative Cap (3.5%, HRS 201B-11)	2,765,000	2,765,000						
HTA's Budgeted/Actual Administrative Costs (applying AG Definition)	1,914,870	1,702,861	2.4%	2.2%				
	850,130	1,062,139						

Hawaii Tourism Authority
Budget Statement
June 30, 2021 and July 1, 2021

			FY21 Funds Encumbered (Budget Used)					
			Encumbered in FY21 (Official Records)		Unofficial FY21			
Program Code	Program Title	FY21 Budget	Processed in FY21	FY 21 Budget Remaining	Processed in FY22	Unofficial FY21: Total FY21 Funds (Encumbered in FY21 and FY22)	FY21 Budget Remaining	Board Reso and TAT Restart Funds (FY21 Funds; Likely would have encumbered w/ FY22 funds)
Perpetuating Hawaiian Culture								
201	Kukulu Ola: Living Hawaiian Cultural Prog	1,751,900	1,751,900	-	-	1,751,900	-	1,750,000
202	Hawaiian Culture Initiative	833,149	833,149	-	-	833,149	-	827,620
206	Kahea Program - Harbor Greetings	111,036	111,036	-	-	111,036	-	110,000
207	Kahea Program - Airport Greetings	534,869	534,828	41	-	534,828	41	534,828
208	Hawaiian Music and Dance Center	5,948,568	-	5,948,568	5,948,568	5,948,568	-	5,948,568
212	Merrie Monarch Hula Festival	100,000	100,000	-	-	100,000	-	-
215	Hawaiian Culture Opportunity Fund	1,406,438	1,306,438	100,000	99,995	1,406,433	5	1,334,995
216	Olelo Hawaii	100,000	100,000	-	-	100,000	-	100,000
297	Memberships and Dues - Hawaiian Culture	300	300	-	-	300	-	-
717	Monthly Music Series	250,000	250,000	-	-	250,000	-	250,000
932	Salaries - Hawaiian Culture	197,416	197,416	-	-	197,416	-	13,471
	Total - Perpetuating Hawaiian Culture	11,233,676	5,185,067	6,048,609	6,048,563	11,233,630	46	10,869,482
Natural Resources								
402	Aloha Aina (formerly NR and Leg Prov NR)	1,841,000	1,841,000	-	-	1,841,000	-	1,750,000
406	Visitor Impact Program	1,574,109	1,537,509	36,600	-	1,537,509	36,600	1,536,910
407	Hawaii Eco Tourism Association	50,000	50,000	-	-	50,000	-	50,000
499	In-House Contracted Staff - Natural Resources	83,000	39,088	43,912	-	39,088	43,912	-
936	State Employee Salaries - Natural Resources	23,750	23,750	-	-	23,750	-	5,000
	Total - Natural Resources	3,571,859	3,491,347	80,512	-	3,491,347	80,512	3,341,910
Community								
700	Community Opportunity	500,000	500,000	-	-	500,000	-	500,000
701	Community Enrichment Program	2,000,000	2,000,000	-	-	2,000,000	-	2,000,000
731	Community-Based Tourism - Oahu	1,781,015	1,780,905	110	-	1,780,905	110	1,693,796
732	Community-Based Tourism - Maui County	1,419,999	1,399,895	20,104	20,000	1,419,895	104	1,070,000
733	Community-Based Tourism - Hawaii Island	1,089,948	1,074,948	15,000	15,000	1,089,948	-	846,204
734	Community-Based Tourism - Kauai	1,090,036	1,075,036	15,000	15,000	1,090,036	-	840,000
797	Memberships and Dues - Community	500	255	245	-	255	245	-
933	State Employee Salaries - Community	168,779	168,779	-	-	168,779	-	12,608
	Total - Community	8,050,277	7,999,818	50,459	50,000	8,049,818	459	6,962,608
Branding								
4	Cruise Infrastructure Improvements and Arrival Experienc	50,000	50,000	-	-	50,000	-	-
318	gohawaii.com (formerly Online Website Coordination)	350,000	350,000	-	-	350,000	-	-
320	Island Chapters Staffing and Admin	4,800,000	4,800,000	-	-	4,800,000	-	2,400,000
321	US (formerly North America)	14,605,000	14,605,000	-	-	14,605,000	-	-
322	Canada	1,200,000	400,000	800,000	800,000	1,200,000	-	800,000
323	Japan	13,500,000	13,500,000	-	-	13,500,000	-	9,000,000
324	Korea	1,700,000	1,700,000	-	-	1,700,000	-	1,400,000
325	Oceania	2,300,000	2,300,000	-	-	2,300,000	-	1,900,000
329	China	1,800,000	1,800,000	-	-	1,800,000	-	1,800,000
331	Meetings, Convention & Incentives	2,395,000	2,395,000	-	-	2,395,000	-	-
339	Global Digital Marketing Strategy (former Intl Online Stra	380,500	380,500	-	-	380,500	-	-
350	Global Mkt Shared Resces (formerly Intellect Prop Data B	737,000	737,000	-	-	737,000	-	-
380	Marketing Opportunity Fund	341	340	1	-	340	1	-
397	Memberships and Dues - Branding	125,000	123,000	2,000	-	123,000	2,000	-
398	Travel - Branding	9,600	-	9,600	-	-	9,600	-
723	Hawaii Film Office Partnership	30,000	30,000	-	-	30,000	-	-
934	State Employee Salaries - Branding	572,788	572,788	-	-	572,788	-	38,940
	Total - Branding	44,555,229	43,743,628	811,601	800,000	44,543,628	11,601	17,338,940
Sports								
312	PGA Tour Contracts	2,166,864	2,166,864	-	-	2,166,864	-	-
377	Polynesian Football HoF	50,000	50,000	-	-	50,000	-	-
378	UH Athletics Branding Partnership	266,000	266,000	-	-	266,000	-	100,000
384	Football	25,000	25,000	-	-	25,000	-	-
	Total - Sports	2,507,864	2,507,864	-	-	2,507,864	-	100,000
Safety and Security								
601	Visitor Assistance Programs	1,156,500	1,082,500	74,000	55,000	1,137,500	19,000	650,000
602	Crisis Management	455,042	348,239	106,803	-	348,239	106,803	-
	Total - Safety and Security	1,611,542	1,430,739	180,803	55,000	1,485,739	125,803	650,000
Tourism Research								
505	Est of Visitor Arrivals by Country by Month	3,500	3,440	60	-	3,440	60	-
506	Infrastructure Research (Accommodations and Airseats)	468,727	468,726	1	-	468,726	1	-
512	Visitor Arrivals and Departure Surveys	940,418	937,804	2,614	(390,082)	547,722	392,696	-
513	Evaluation and Performance Studies	784,173	783,973	200	-	783,973	200	-
514	Marketing Research	177,740	133,705	44,035	-	133,705	44,035	-
597	Memberships and Dues - Research	30,561	30,331	230	-	30,331	230	-
935	State Employee Salaries - Research	450,280	450,279	1	-	450,279	1	33,119
	Total - Tourism Research	2,855,399	2,808,258	47,141	(390,082)	2,418,176	437,223	33,119
Administrative								
101	Community-Industry Outreach & Public Relations Svcs	547,386	347,385	200,001	200,000	547,385	1	400,000
103	hawaiitourismauthority.org (formerly HTA web/Global Sc	35,960	35,959	1	-	35,959	1	-
901	General and Administrative	296,850	289,307	7,543	-	289,307	7,543	-
909	Protocol Fund	5,000	536	4,464	-	536	4,464	-
930	State Employee Salaries - Admin	1,029,674	1,029,674	-	-	1,029,674	-	72,215
	Total - Administrative	1,914,870	1,702,861	212,009	200,000	1,902,861	12,009	472,215
Governance and Organization-Wide								
915	Organization-Wide	189,000	162,618	26,382	-	162,618	26,382	-
919	Governance - Gen Board/Others	113,176	101,647	11,529	-	101,647	11,529	-
931	State Employees Fringe	1,122,355	1,120,894	1,461	-	1,120,894	1,461	81,493
	Total - Governance and Organization-Wide	1,424,531	1,385,159	39,372	-	1,385,159	39,372	81,493
	Total	77,725,247	70,254,741	7,470,506	6,763,481	77,018,222	707,025	39,849,767
Convention Center Enterprise Special Fund:								
Branding								
934	State Employee Salaries - Branding	76,650	76,649	1	-	76,649	1	-
	Total - Branding	76,650	76,649	1	-	76,649	1	-
Administrative								
930	State Employee Salaries - Admin	274,580	256,717	17,863	-	256,717	17,863	-
	Total - Administrative	274,580	256,717	17,863	-	256,717	17,863	-
HCC Operations								
850	HCC Operating Expense	20,705,657	7,633,157	13,072,500	13,186,400	20,819,557	(113,900)	13,186,400
860	HCC Repair and Maintenance	22,960,600	2,000,000	20,960,600	20,960,600	22,960,600	-	20,960,600
870	HCC Sales and Marketing / MFF	875,625	875,625	-	-	875,625	-	-
871	HCC Local Sales	1,013,532	480,532	533,000	533,000	1,013,532	-	533,000
	Total - HCC Operations	45,555,414	10,989,314	34,566,100	34,680,000	45,669,314	(113,900)	34,680,000
Governance and Organization-Wide								
915	Organization-Wide	760,000	736,699	23,301	-	736,699	23,301	420,000
931	State Employees Fringe	198,634	118,508	80,126	-	118,508	80,126	-
	Total - Governance and Organization-Wide	958,634	855,207	103,427	-	855,207	103,427	420,000
	Total CCEF	46,865,278	12,177,887	34,687,391	34,680,000	46,857,887	7,391	35,100,000

Board Resolution 2021-2-1:

\$18,442,926 Board Reso Funds (incl approximately \$3M of FY21 base budget funds, that prior to passage of the Board Reso we anticipated to not be used)

Contractor	Board Reso / TAT Restart Amount	Base Funding	Status	Description	Contract Number	Procurement Type	Program	Funding Source	Encumbrance #
Anthology	200,000.00		Encumbered	Strategic and other communications	20010 S4	Supplemental	101: Community Industry Outreach PR Services	Resolution 2021-2-1	21-ENC-1575
Council for Native Hawaiian Advancement	100,000.00		Encumbered	Pop Up Makeke Season 3	21026	Sole Source	215: Hawaiian Culture Opportunity Fund	Resolution 2021-2-1	21-ENC-1276
County of Kaua'i Office of Economic Development	42,000.00	150,000.00	Encumbered	Kaua'i DMAP 2021: Transportation Change and Kaua'i Made Support	MOA 21025	Procurement Exemption	734: Community Based Tourism - County of Kaua'i \$150,000 206: Kaheha Programs Harbor Greetings \$42,000	Resolution 2021-2-1 (\$42,000 Harbor) FY21 Base Budget (\$150,000 CBT Kauai)	21-ENC-1272
Department of Transportation - Airport Division	534,828.00		Encumbered	Kaheha Airport Greetings	MOA 21039	Procurement Exemption	207: Kaheha Program Airport Greetings	Resolution 2021-2-1	21-ENC-1312
Destination Kona Coast	28,000.00		Encumbered	Kona Kaheha Harbor Greetings 2022	21036	Procurement Exemption	206: Kaheha Program-Harbor Greetings	Resolution 2021-2-1	21-ENC-1292
Hawai'i Community Foundation	3,500,000.00		Encumbered	HTA x HCF Implementation of Kūkulu Ola & Aloha Aina Programs	21033	Sole Source	201: Kūkulu Ola \$1,750,000 402: Aloha 'āina \$1,750,000	Resolution 2021-2-1	21-ENC-1281
Hawai'i Ecotourism Association dba Sustainable Tourism Association of Hawai'i	50,000.00		Encumbered	Sustainable Tourism Management in Hawai'i through Certification, Trainings & Partnerships	PON 21034	Sole Source	407: Hawai'i Ecotourism Association	Resolution 2021-2-1	21-ENC-1286
Hawai'i Visitors and Convention Bureau	6,150,000.00	259,112.00	Encumbered	CEP & DMAP Impelentation & Communications for Kaua'i, Oahu, Maui Nui, and Hawai'i Island & Study & Implementation of the State of HI Universal Reservations System	21038	Procurement Exemption	701: CEP \$2,000,000.00 (Reso) 731: O'ahu \$694,000.00 (Reso) 732: Maui \$152,610 (Base) + \$670,000 (Reso) = \$822,610 733: Hāwai Isl \$75,964 (Base) + \$546,000 (Reso) = \$621,964.00 734: Kaua'i \$30,538 (Base + \$540,000 (Reso) = \$570,538.00 101: Communications \$200,000.00 (Reso) 406: Visitor Impact \$1,500,000.00 (Reso)	Resolution 2021-2-1 (\$6,150,000) FY2021 Base Budget (\$259,112)	21-ENC-1301
HCC-AEG LLC	5,948,568.00		Encumbered	Funding for Center for Hawaiian Music & Dance from the TSF	14002 S12	Supplemental	208: CHMD \$5,948,568	Resolution 2021-2-1	PY-14235
Hilo Hawaii Visitor Industry Association, Inc. dba Destination Hilo	40,000.00		Encumbered	Hilo Kaheha Harbor Greetings 2022	21035	Procurement Exemption	206: Kaheha Program-Harbor Greetings	Resolution 2021-2-1	21-ENC-1291
Native Hawaiian Hospitality Association dba NahHA	1,849,530.00		Encumbered	Native Hawaiian Hospitality Association (NahHA) 2021-2022 Work Plan	18200 S3	Supplemental	202: Hawaiian Culture Initiative \$827,620 406: Visitor Impact Program \$36,910 216: Olelo \$100,000 717: Music \$250,000 215: Hawaiian Culture Opp \$635,000	Resolution 2021-2-1	21-ENC-1274

TAT Restart:

\$21,406,841 TAT Restart Funds

a.link LLC	9,000,000.00		Encumbered	Japan MMA Marketing Management Services	21028	Procurement Exemption	323: Japan	TAT restart	21-ENC-1280
AVIAREPS Marketing Garden Holdings Ltd.	1,400,000.00		Encumbered	Destination Marketing Management Services for Korea	20007 S4	Supplemental	324: Korea	TAT restart	20-ENC-1592
Council for Native Hawaiian Advancement	99,995.00		Encumbered	Pop-Up Makeke	21026 S1	Supplemental	215: Hawaiian Culture Opportunity Fund	TAT restart	21-ENC-1276
Director of Finance	256,846.00		Encumbered	Payroll	N/A	N/A	930: Salaries Admin \$71,601 932: Salaries HC \$13,471 933: Salaries Comm \$12,608 934: Branding \$38,940 935: Research \$33,119 936: Salaries NR \$5,000 931: Fringe \$81,493	TAT restart	21-ENC-1045
Hawai'i Visitors and Convention Bureau	2,400,000.00		Encumbered	Island Chapters Support Services	21030	Procurement Exemption	320: Island Chapter Staffing & Administration	TAT restart	21-ENC-1284
Hawaii Visitors and Convention Bureau	100,000.00		Encumbered	HTA-UH Athletics partnership. Alumni, Community and Visitor Marketing Events	21044	Procurement Exemption	378: Branding Partnership w/ UH Athletics	TAT restart	21-ENC-1322
Hawaii Visitors and Convention Bureau	3,000,000.00		Encumbered	DMAP Implementation and Signature Events	21038	Procurement Exemption	731: O'ahu \$999,796.00 732: Maui \$400,000.00.00 733: Hāwai Isl \$300,204.00 734: Kaua'i \$300,000.00 700: Community Opp \$500,000.00 215: HC Opp \$500,000.00	TAT restart	21-ENC-1301
ITRAVLOCAL Limited	1,800,000.00		Encumbered	China MMA Marketing Management Services	21031	Procurement Exemption	329: China	TAT restart	21-ENC-1282
Maui County Visitors Association dba Maui Visitors Bureau	55,000.00		Encumbered	Visitor Assistance Program - Maui 2022	21043	Procurement Exemption	601: Visitor Assistance Prog	TAT restart	21-ENC-1320
The Walshe Group Pty Ltd dba Hawai'i Tourism Oceania	1,900,000.00		Encumbered	Hawai'i Tourism Inbound Destination Marketing Management Services in the Oceania Major Market Area	21019 S2 Multi-Year	Supplemental	325: Oceania	TAT restart	21-ENC-1194
VASH Hawai'i Island	170,000.00		Encumbered	Visitor Assistance Program - Island of Hawai'i 2022	21041	Procurement Exemption	601: Visitor Assistance Prog	TAT restart	21-ENC-1318
Visitor Aloha Society of Hawai'i	370,000.00		Encumbered	Visitor Assistance Program - O'ahu 2022	21040	Procurement Exemption	601: Visitor Assistance Prog	TAT restart	21-ENC-1317
Visitor Aloha Society of Kaua'i, Inc.	55,000.00		Encumbered	Visitor Assistance Program - Kaua'i 2022	21042	Procurement Exemption	601: Visitor Assistance Prog	TAT restart	21-ENC-1319
VoX International Inc.	800,000.00		Encumbered	Canada MMA Marketing Management Services	21029	Procurement Exemption	322: Canada	TAT restart	21-ENC-1283
	39,849,767.00								

Convention Center Enterprise Special Fund:

\$16.5M TAT Restart fund and \$18,600,000 Resolution 2021-2-1 funds

HCC-AEG LLC	34,680,000.00		Encumbered	HCC management services, including funding for facilities operations, local sales and significant repair and maintenance.	14002 S12	Supplemental	850: Facilities Ops \$13,186,400 860: Major R&M \$20,960,600 871: Local Sales \$533,000	Resolution 2021-2-1 \$16,180,000 TAT restart	PY-14235
DAGS Risk Management	420,000.00		Encumbered	Property insurance for HCC	N/A	N/A	915 Org Wide \$320,000 (TAT Restart) 915 Org Wide \$100,000 (Reso)	\$320,000 TAT restart \$100,000 Resolution 2021-2-1	21-ENC-1288

Budget Reallocation Summary
FY 2021
Through June 30, 2021

Budget Line Item	Program Code	Amended Budget (December 2020)	Year-to-Date		Budget After Reallocations	May-June 2021 Activity
				Reallocation		
Perpetuating Hawaiian Culture						
<i>From:</i>						
Olelo Hawaii	216	250,000	(150,000)		100,000	(150,000)
FESTPAC	217	50,000	(50,000)		-	(50,000)
Surfing	374	50,000	(50,000)		-	(50,000)
State Employee Salaries - Hawaiian Culture	932	228,561	(31,145)		197,416	(31,145)
			(281,145)			(281,145)
<i>To:</i>						
Memberships and Dues - Hawaiian Culture	297	-	300		300	
Kukulu Ola: Living Hawaiian Cultural Prog	201	-	1,751,900		1,751,900	1,751,900
Hawaiian Culture Initiative	202	500,000	333,149		833,149	333,149
Kahea Program - Harbor Greetings	206	-	111,036		111,036	111,036
Kahea Program - Airport Greetings	207	-	534,869		534,869	534,869
Hawaiian Music and Dance Center	208	250,000	5,698,568		5,948,568	5,698,568
Hawaiian Culture Opportunity Fund	215	250,000	1,156,438		1,406,438	1,156,738
Monthly Music Series	717	-	250,000		250,000	250,000
					-	
					-	
			9,836,260			9,836,260
Natural Resources						
<i>From:</i>						
State Employee Salaries - Natural Resources	936	64,959	(41,209)		23,750	(1,834)
					-	
					-	
			(41,209)			(1,834)
<i>To:</i>						
In-House Contracted Staff - Natural Resources	499	20,000	63,000		83,000	
Aloha Aina	402	-	1,841,000		1,841,000	1,750,000
Hawaii Eco Tourism Association	407	-	50,000		50,000	50,000
Visitor Impact Program	406	1,000,000	574,109		1,574,109	665,109
					-	
			2,528,109			2,465,109
Community						
<i>From:</i>						
None					-	
					-	
					-	
			-			-
<i>To:</i>						
Community Opportunity	700	-	500,000		500,000	500,000
Community Enrichment Program	701	-	2,000,000		2,000,000	2,000,000
Community-Based Tourism - Oahu	731	81,000	1,700,015		1,781,015	1,693,810
Community-Based Tourism - Maui County	732	350,000	1,069,999		1,419,999	1,069,999
Community-Based Tourism - Hawaii Island	733	250,000	839,948		1,089,948	846,153
Community-Based Tourism - Kauai	734	250,000	840,036		1,090,036	840,036

Budget Reallocation Summary
FY 2021
Through June 30, 2021

Budget Line Item	Program Code	Amended Budget (December 2020)	Reallocation	Budget After Reallocations	May-June 2021 Activity
State Employee Salaries - Community	933	154,834	13,945	168,779	13,945
				-	
				-	
			6,963,943		6,963,943
Branding					
From:					
Travel - Branding	398	10,000	(400)	9,600	
Global Marketing Shared Resources	350	787,000	(50,000)	737,000	
				-	
			(50,400)		-
To:					
Marketing Opportunity Fund	380	-	341	341	(59)
gohawaii.com	318	300,000	50,000	350,000	
Island Chapters	320	2,400,000	2,400,000	4,800,000	2,400,000
Canada	322	400,000	800,000	1,200,000	800,000
Japan	323	4,500,000	9,000,000	13,500,000	9,000,000
Korea	324	300,000	1,400,000	1,700,000	1,400,000
Oceania	325	400,000	1,900,000	2,300,000	1,900,000
China	329	-	1,800,000	1,800,000	1,800,000
State Employee Salaries - Branding	934	535,011	37,777	572,788	37,777
				-	
				-	
			17,388,118		17,337,718
Sports					
From:					
Polynesian Football Hall of Fame	377	155,000	(105,000)	50,000	
Sports Programs - Unallocated	379	-	-	-	(80,000)
				-	
			(105,000)		(80,000)
To:					
Football (Hula Bowl)	384	-	25,000	25,000	
Tennis	370	-	-	-	-
UH Athletics Branding Partnership	378	166,000	100,000	266,000	100,000
				-	
			125,000		100,000
Safety and Security					
From:					
None				-	
				-	
				-	
To:					
Visitor Assistance Program	601	650,000	506,500	1,156,500	506,500
Crisis Management	602	425,629	29,413	455,042	29,413
				-	
			535,913		535,913

Budget Reallocation Summary
FY 2021
Through June 30, 2021

Budget Line Item	Program Code	Amended Budget (December 2020)	Reallocation	Budget After Reallocations	May-June 2021 Activity
Tourism Research					
<i>From:</i>					
Visitor Arrivals and Departure Surveys	512	1,150,581	(210,163)	940,418	46,227
Infrastructure Research	506	520,879	(52,152)	468,727	(52,152)
Memberships and Dues - Research	597	42,322	(11,761)	30,561	(11,761)
			(274,076)		(17,686)
<i>To:</i>					
Evaluation and Performance Studies	513	662,810	121,363	784,173	(137)
Marketing Research	514	42,850	134,890	177,740	
State Employee Salaries - Research	935	408,393	41,887	450,280	41,887
			298,140		41,750
Administration					
<i>From:</i>					
hawaiiourismauthority.org	103	50,000	(14,040)	35,960	(14,040)
State Employee Salaries - Admin	930	1,103,024	(73,350)		(73,350)
			(87,390)		(87,390)
<i>To:</i>					
Community-Industry Outreach & Public Relations	101	265,000	282,386	547,386	282,386
General and Administrative	901	293,700	8,150	301,850	8,150
			290,536		290,536
Governance and Organization-Wide					
<i>From:</i>					
State Employees Fringe	931	1,535,226	(412,871)	1,122,355	(389,246)
Organization-Wide	915	195,000	(6,000)	189,000	
			(418,871)		(389,246)
<i>To:</i>					
Governance - Gen Board/Others	919	89,600	23,576	113,176	17,576
			23,576		17,576
Board Allocations					
<i>From:</i>					
TAT Restart Funds in FY21			(21,504,557)	(21,504,557)	(21,504,557)
Board Resolution 2021-2-1 (May 2021 Meeting)			(15,226,947)	(15,226,947)	(15,226,947)
			(36,731,504)		(36,731,504)
			-		-

Note 1: At its December 17, 2020 meeting, the HTA Board approved an amended FY21 budget. This schedule captures reallocations made after the amended budget.

Note 2: The above schedule reflects increases to the budget of \$36,731,504 sourced from HTA's Board Allocations / Reserves. The \$36,731,504 is comprised of \$21,504,557 attributed to the restart of TSF TAT funds in FY21 and \$15,226,947 from preexisting reserves (including \$5.9M related to the Center for Hawaiian Music & Dance). The Resolution allowed for the encumbering of additional funds that subsequently became available.