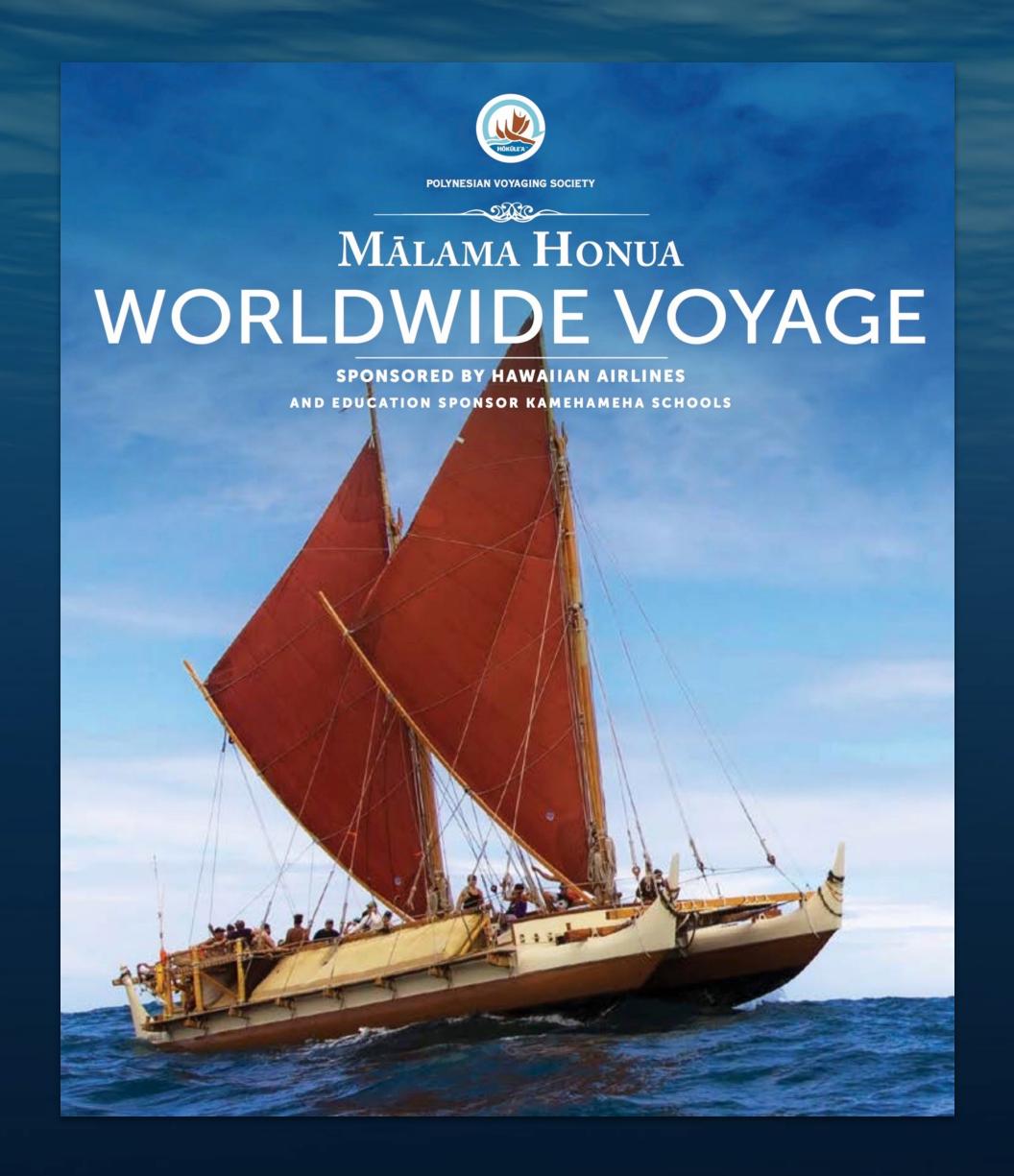
malama KU'UHOME

Caring for My Beloved Home







2014-2017 MALAMAHONUA Caring for Island Earth

To navigate toward
a healthy and sustainable future
for ourselves, our home, and our
Island Earth through voyaging
and new ways of learning.







"Nainoa, I count on your leadership and commitment as we carry out our plans to make this world safer and more sustainable for all."

– Ban Ki-moon UN Secretary General







United Nations Conference

Island Voices Global Choices

Apia, Samoa September 2014







Aloha+CHALLENGE

A Culture of Sustainability: He Nohona 'Ae'oia



Aloha+CHALLENGE



70% Clean Energy



Double Local Food Production



Reverse Natural Resource Loss



Reduce Solid Waste By 70%



Increase Livability & Resilience In The Built Environment



Increase Green Jobs & Education



"It may seem as if the world is falling apart, as crises pile up and disease spreads. But leadership is precisely about finding the seeds of hope and nurturing them into something bigger."

- Secretary-General Ban Ki-moon September 24, 2014













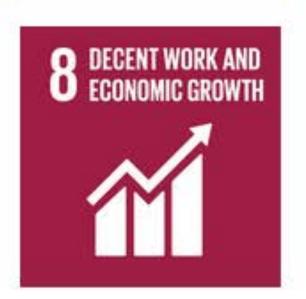








































Strategic Plan 2020-2025

Natural Resources Hawaiian Culture

Community

Brand Marketing

Responsible Tourism



Strategic Plan 2020-2025

Destination Management Action Plans

Natural Resources Hawaiian Culture

Community

Brand Marketing

Regenerative Tourism

The most responsible tourism model for Hawai'i is regenerative tourism, which seeks to balance the economics of tourism with the wellbeing of our communities and natural resources.





malama KU'UHOME

Caring for My Beloved Home





ORGANIZATION STRUCTURE

- Reduced staff size from 32 to 25
- Research Division moved to DBEDT-READ
- Working through the overall reorganization of HTA
- Redescribed 13 positions ranging from administrative to senior level positions

- Reorganized positions based on changing needs of organization
- Updated/revised organizational chart
- Ongoing recruitment for various positions within HTA



PLANNING FUNCTION

- Redescribed position into new Planning Director
- Focus on planning function/ responsibilities of HTA

- Responsible for oversight and development of plans: Strategic Plan, Destination Management Action Plans, Tourism Recovery Plan
- Elevate critical role planning plays in the overall efforts of the HTA



FUNDING SOURCE

- Tourism Special Fund set to sunset as of December 31, 2021
- American Rescue Plan Act funds provided for FY22 (\$60M)
- Worked closely with Budget and Finance to secure access to the funds

- Complied with required/requested documentation to support use
- Working closely with Dept. of Accounting and General Services to utilize funds
- Working through Dept. of Business, Economic Development & Tourism to expend funds

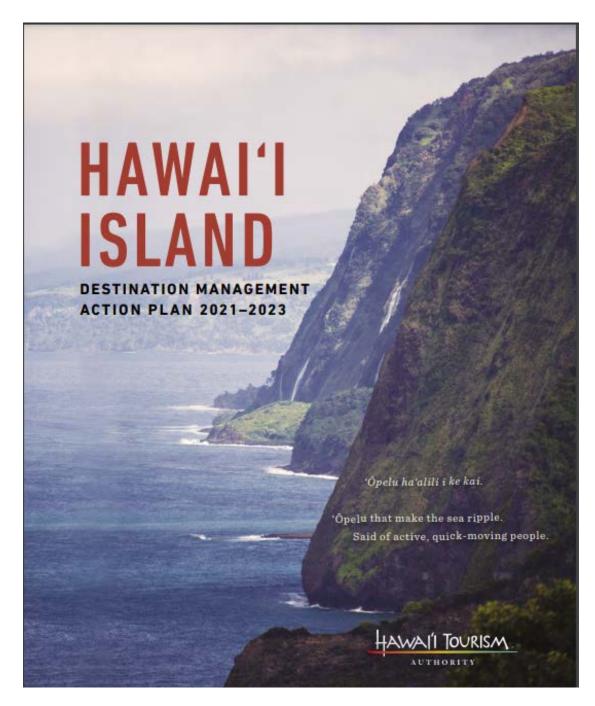


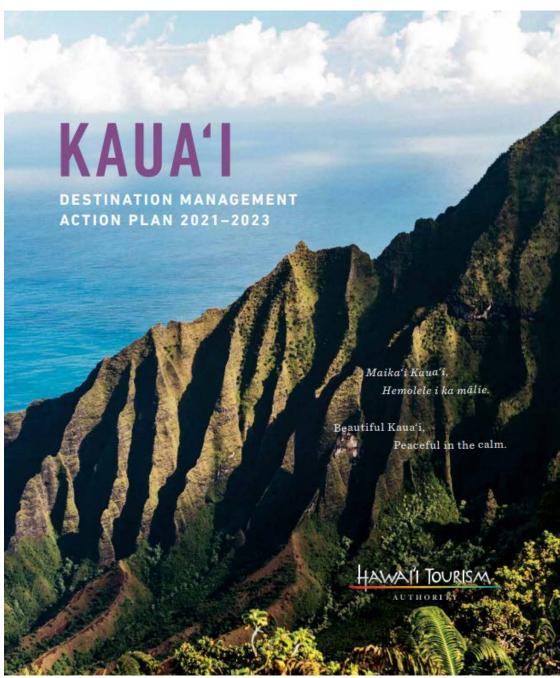
PROCUREMENT

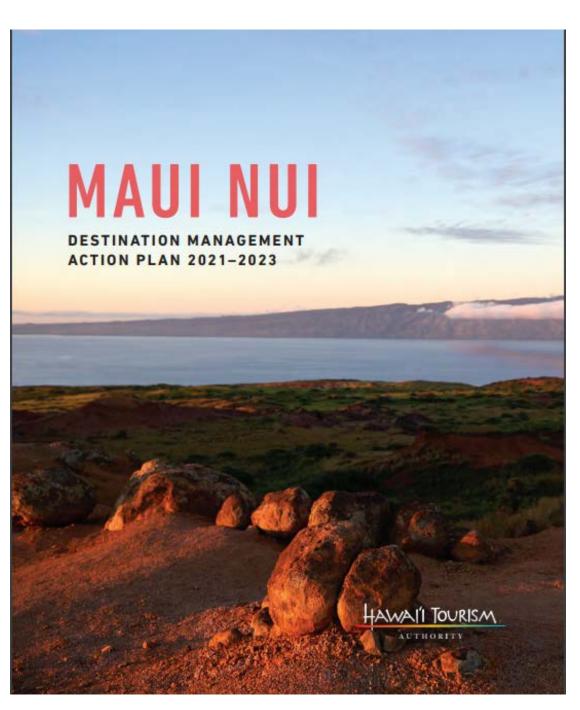
- HTA no longer is exempt from state procurement statute (103D)
- HTA revising internal policies and procedures to align with SPO/103D
- HTA is following SPO/103D requirements

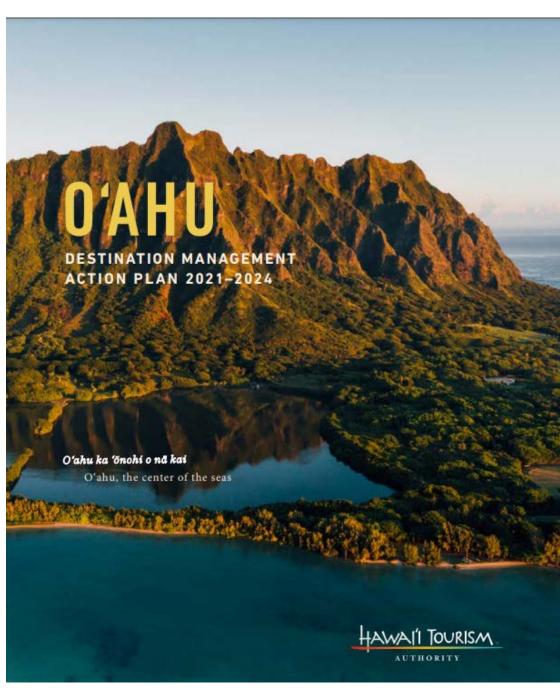
- HTA team completed State
 Procurement Office (SPO) training
 - Basic training (7 Required Courses) All Staff
 - Advanced training (7 Required Basic Courses + 7 Required Advanced) - Specific Staff
 - Allow HTA to meet procurement needs and comply with statute











PROGRESS OF THE DESTINATION MANAGEMENT ACTION PLANS

CAROLINE ANDERSON, DIRECTOR OF PLANNING



GETTING IT DONE FOR OUR COMMUNITIES

TRACKING DMAP IMPLEMENTATION



HTA meets with the Counties, Island Visitors Bureaus, and internally for a monthly review.



DMAP Steering Committees review initial progress reports.



Progress reports finalized based on their input and feedback.



HTA Board updated quarterly.



KAUA'I

DMAP ANCHOR ACTIONS

Action A: Focus on policy efforts on appropriate behavior...

Action B: Collaborate w/DLNR to incr monitoring and enforcement...

Action C: Invest in Hawaiian cultural programs to enhance experience...

Action D: Focus policies that address overtourism...

Action E: Encourage low-impact green rides, reduce island traffic...

Action F: Increase communication, engagement, outreach efforts...

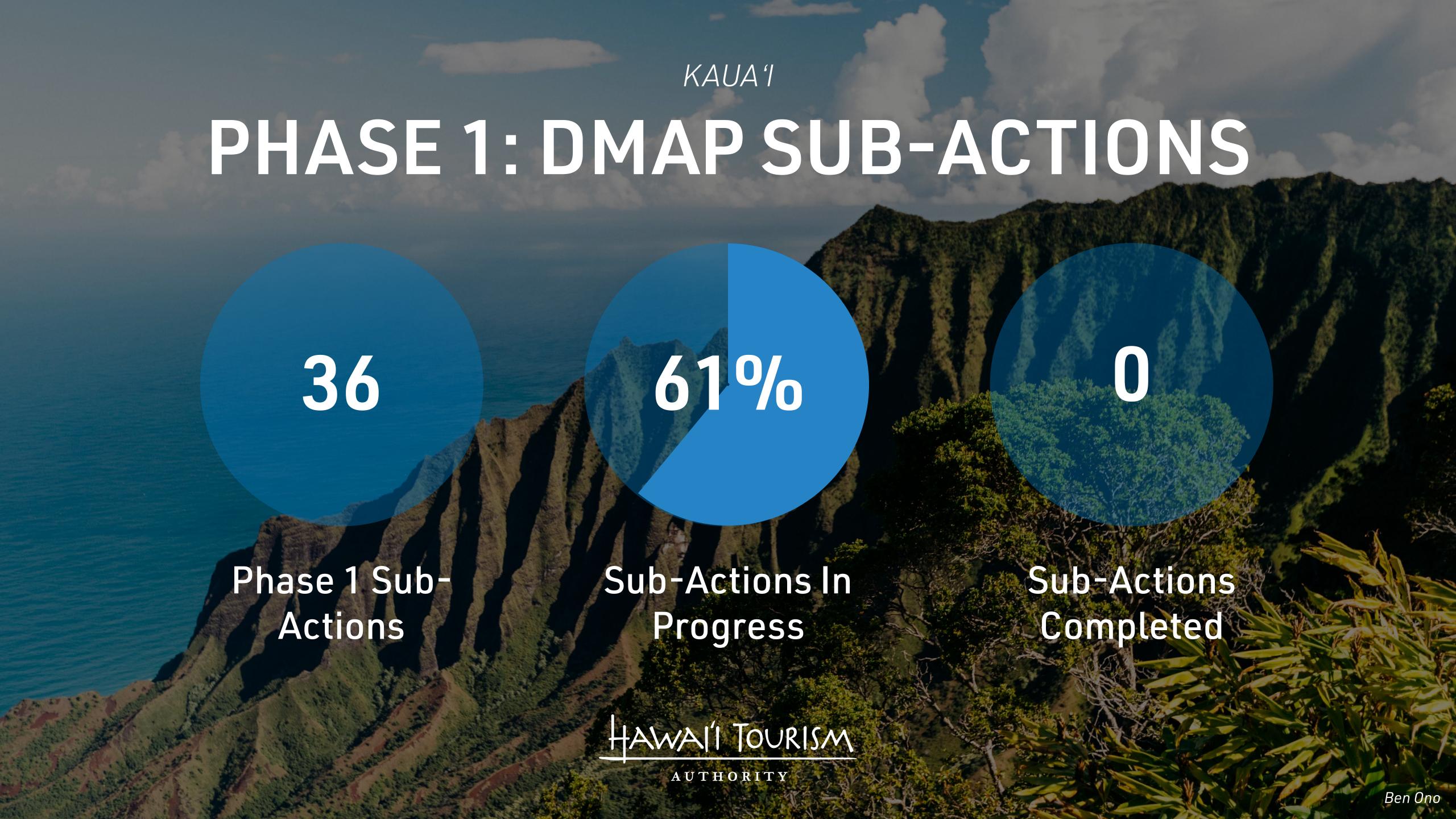
Action G: Develop educational materials for visitors and new residents...

Action H: Promote "Shop Local" to visitors and residents.

Action I: Support diversification of other sectors.





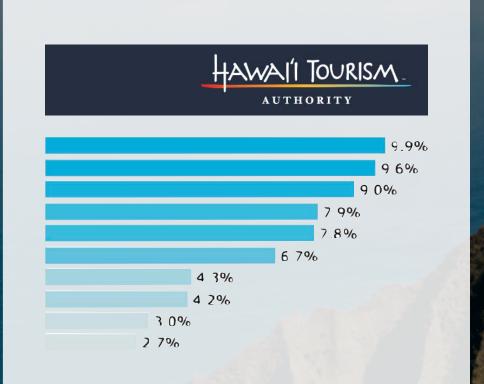


KAUA'I

DMAP SUB-ACTION HIGHLIGHTS



✓ Funding the Sustainable Tourism Association of Hawai'i's Sustainable Tour Operator Certification Program. (A.5)



Monitoring visitor counts at hotspot areas via Near and Symphony Dashboards. (D.5)



✓ Developing and placing COVID-19 health and safety brochures at Līhu'e Airport. (G)



√ The County launched GetAroundKauai.com
to inform visitors and residents of available transportation options. (E.1, E.2)



✓ Relaunching Hawai'i Farms Trail App and agritourism capacity building tours. (I.1)

HAWAII TOURISM

MAUI

DMAPANCHORACTIONS

Action A: Implement a responsible tourism marketing comm program...

Action B: Initiate, fund and continue programs to protect health...

Action C: Continue to reach out to the community to understand...

Action D: Contnue to offer cultural education and training programs...

Action E: Develop regeneration tourism initiatives

Action F: Develop and promote initiatives to improve the transportation...

Action G: Ensure more direct benefits to residents from tourism.

Action H: Advocate for consistent enforecement of laws...





MAUI

PHASE 1: DMAP SUB-ACTIONS

23

70%

Phase 1 Sub-Actions Sub-Actions In Progress

Sub-Actions Completed

HAWAII TOURISM

AUTHORITY

MAUI

DMAP SUB-ACTION HIGHLIGHTS



✓ Relaunching the GoHawaii app, and promoting of Hawai'i's sunscreen law to visitors via social media, app, and gohawaii.com. (A.2, A.3, B.1)



✓ Supporting NaHHA's online cultural training and Ka Huina conference. (D4)



✓ Convening state/county/
federal agencies/nonprofits
to look at mitigating visitor
impact at Hāna. (H.1)



✓ Providing Maui ALOHA Shuttle as alternative ground transportation. (F)

HAWAII TOURISM

MOLOKA'I

DMAP ANCHOR ACTIONS

Action A: Develop communication and education program...

Action B: Growth of Moloka'i businesses focused on regenerative tourism...

Action C: Promote Moloka'i to kama'āina and specific visitor segments...

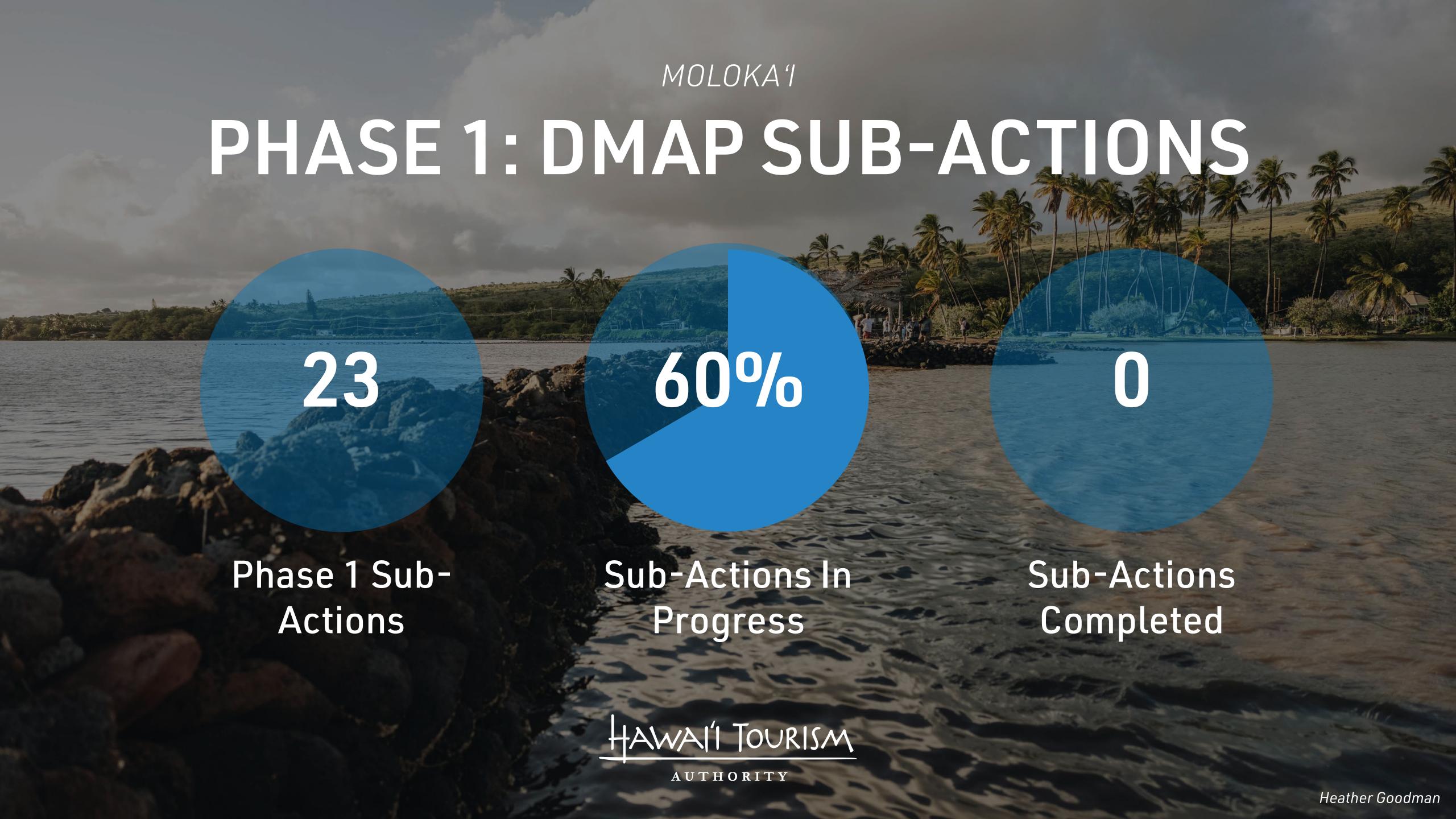
Action D: Enhance resident-visitor relations by strengthening exisiting orgs...

Action E: Provide accommodations that meet the needs of target segments.

Action F: Engage partners to determine a path for interisland transportation...

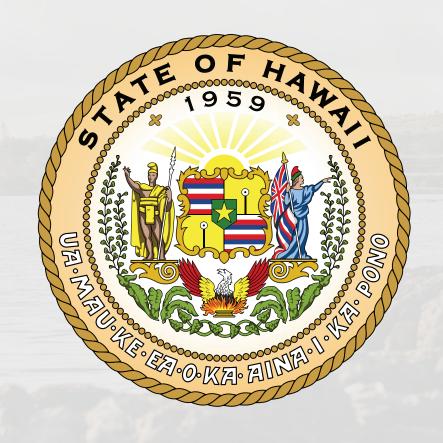






MOLOKA'I

DMAP SUB-ACTION HIGHLIGHTS



✓ Working with DOT-Airports to set up Aloha Ambassador Volunteer Program at Moloka'i Airport. (A.1)



✓ County implemented a program and issued grants to support local businesses. Maui Business Resource Center (Maui) and Kuha'o Business Center (Moloka'i) capacity-building webinars were conducted virtually in Q1 and Q2 of 2021. (B1, B2)



✓ County is researching the federal Essential Air Service program, which guarantees that small communities have access to airline service. (A.1)



LĀNA'I

DMAP ANCHOR ACTIONS

Action A: Engage partners to enhance interisland transportation...

Action B: Develop partnerships with resorts and other tourism businesses...

Action C: Enhance and encourage use of the Lana'i Guide App...

Action D: Encourage sustainable tourism practices on Lāna'i.

Action E: Promote Lāna'i City to increase spending with small businesses.

Action F: Encourage and enable visitors to plan a meaningful daytrip...

Action G: Educate Lāna'i visitors on the Mālama Maui Pledge...

Action H: Discourage drop-off of visitors who use beaches and facilities...

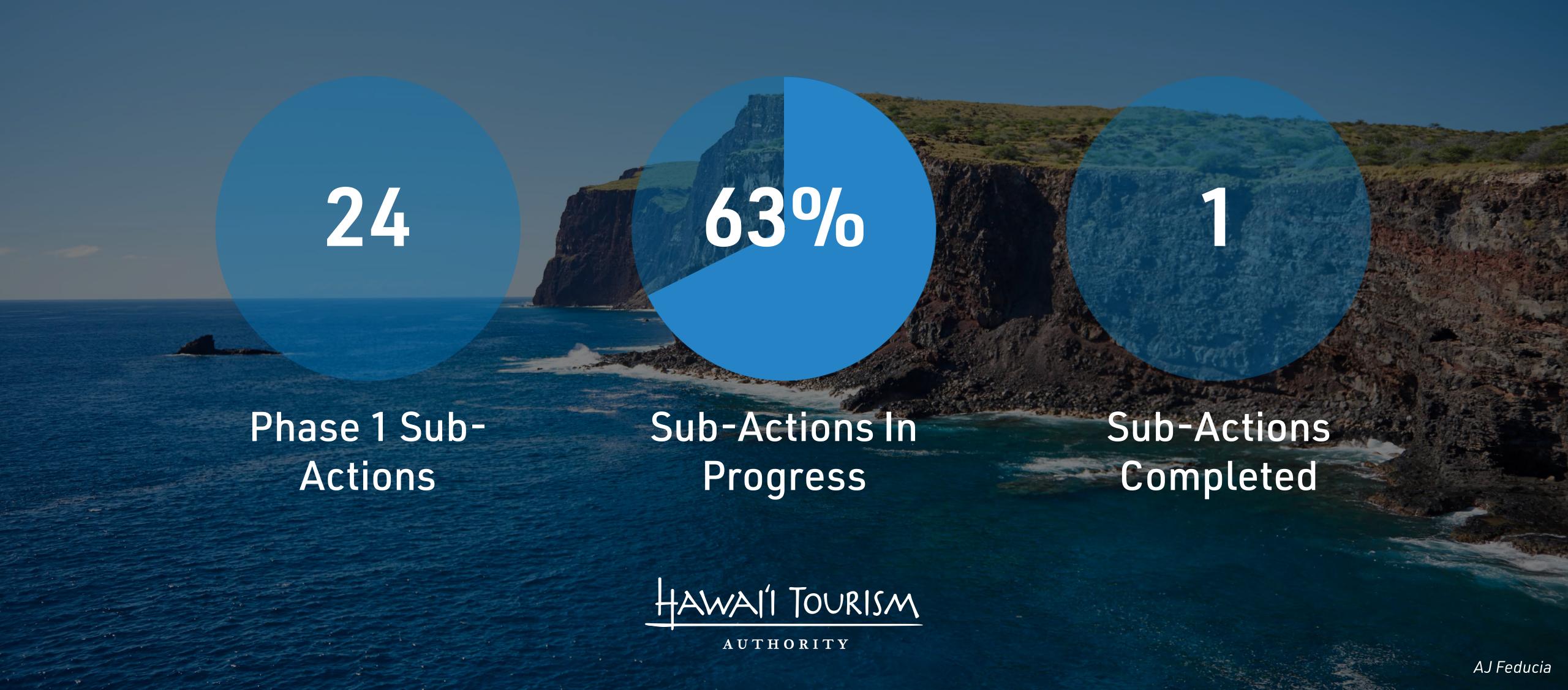
Action I: Educate visitors on activities and events available on Lāna'i...





LĀNA'I

PHASE 1: DMAP SUB-ACTIONS



LĀNA'I

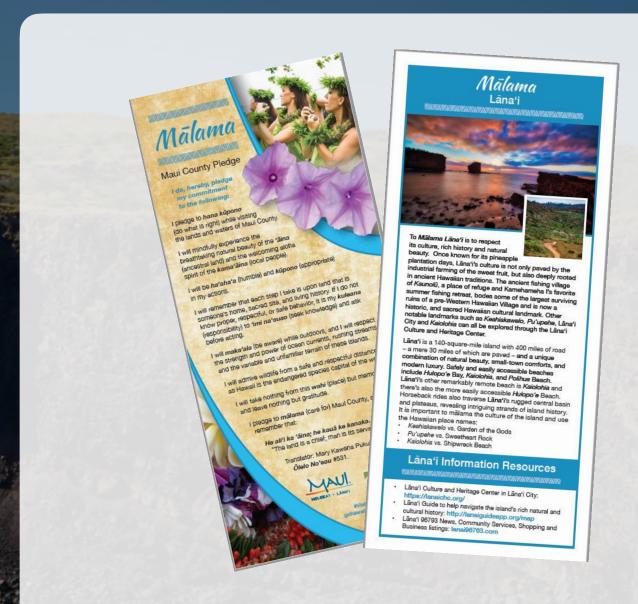
DMAP SUB-ACTION HIGHLIGHTS



✓ County is researching the federal Essential Air Service program, which guarantees that small communities have access to airline service. (A.1)



MVCB installed a digital kiosk on June 29 at Kahului Airport. (F.7)



✓ MVCB developed rack cards for Mālama Maui County Pledge. (G.1)



HAWAI'I ISLAND

DMAPANCHOR ACTIONS

Action A: Protect and preserve culturally significant places and hotspots.

Action B: Develop resources and programs to perpetuate Hawaiian culture...

Action C: Support and promote 'āina-based education and practices...

Action D: Connect with community networks and partner with orgs...

Action E: Create opportunities for ongoing dialogue, engagement...

Action F: Implement a communications and education plan, Pono Pledge...

Action G: Promote agritourism, and partner with Hawai'i Island's ag industry...

Action H: Invest in community-based programs that enhance quality of life...





HAWAI'I ISLAND

PHASE 1: DMAP SUB-ACTIONS

45

73%

0

Phase 1 Sub-Actions Sub-Actions In Progress

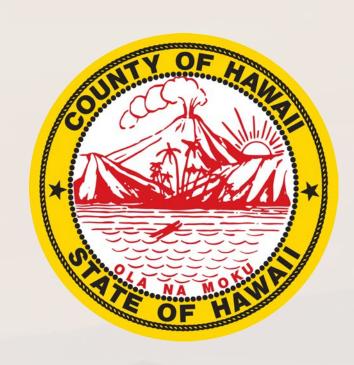
Sub-Actions Completed

HAWAII TOURISM
AUTHORITY

Larry Marshall

HAWAI'I ISLAND

DMAP SUB-ACTION HIGHLIGHTS



✓ County funding projects through the Innovation Grant, as well as a pilot project for tour operator certification. (A.1, A.2, A.3, C.1, C.2, C.3, D.1)



√ Hawai'i Volcanoes
National Park is
restoring the original
Hawaiian place
names to its park
maps, apps, and
signs. (A.2)



√ IHVB investment in the Pono Pledge video. (F.1)



✓ Supporting NaHHA's online cultural training and Ka Huina conference. (B.2)



✓ Relaunching Hawai'i Farms Trail App and agritourism capacity building tours. (G.1)





HTA-FUNDED, ISLAND-BASED

OUR DESTINATION MANAGERS



Catherine Orlans



Megan DeGaia



Coming Soon











GETTING IT DONE FOR OUR COMMUNITIES

HOW CAN I GET INVOLVED?





NO TASK IS TOO BIG WHEN DONE TOGETHER BY ALL.

'A'OHE HANA NUI KE ALU 'IA.

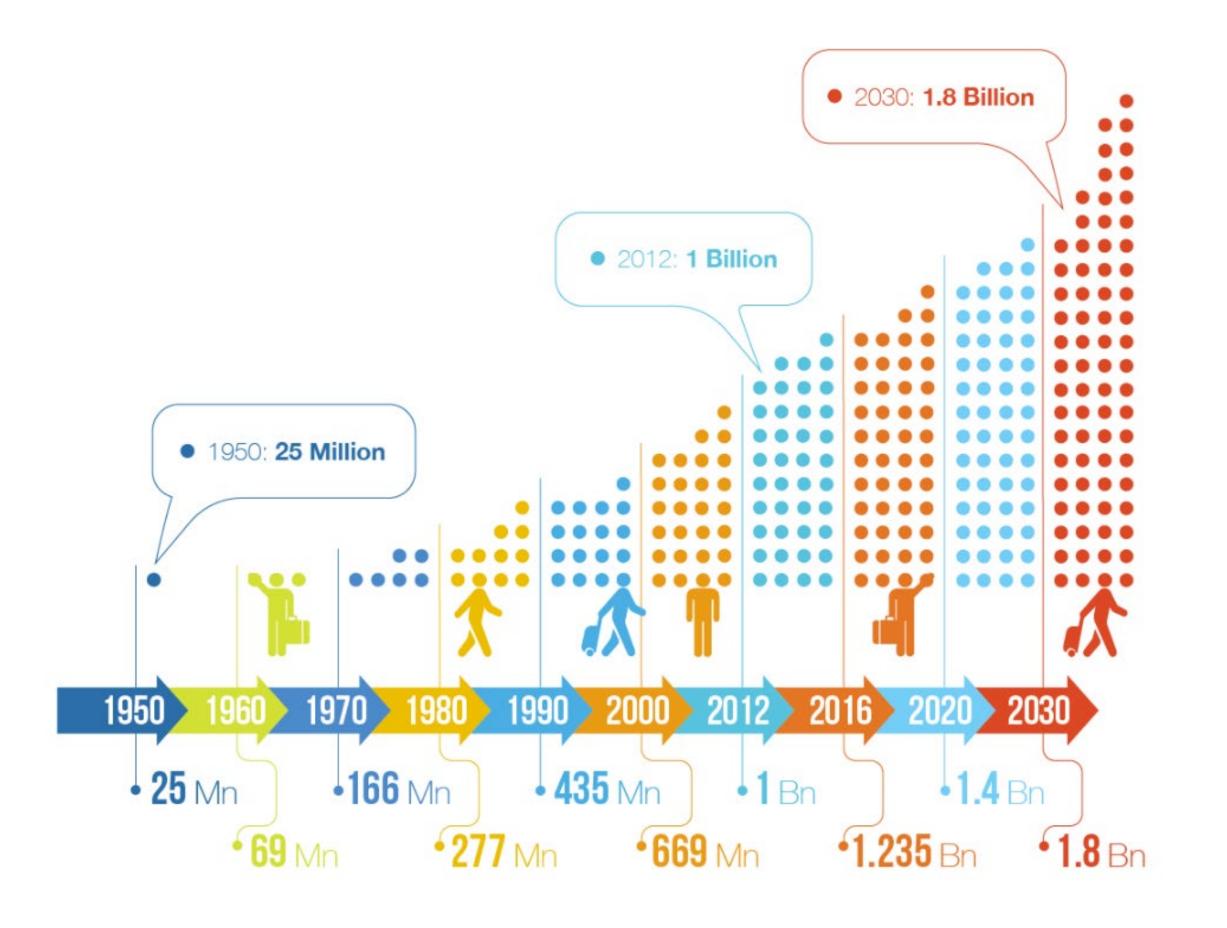


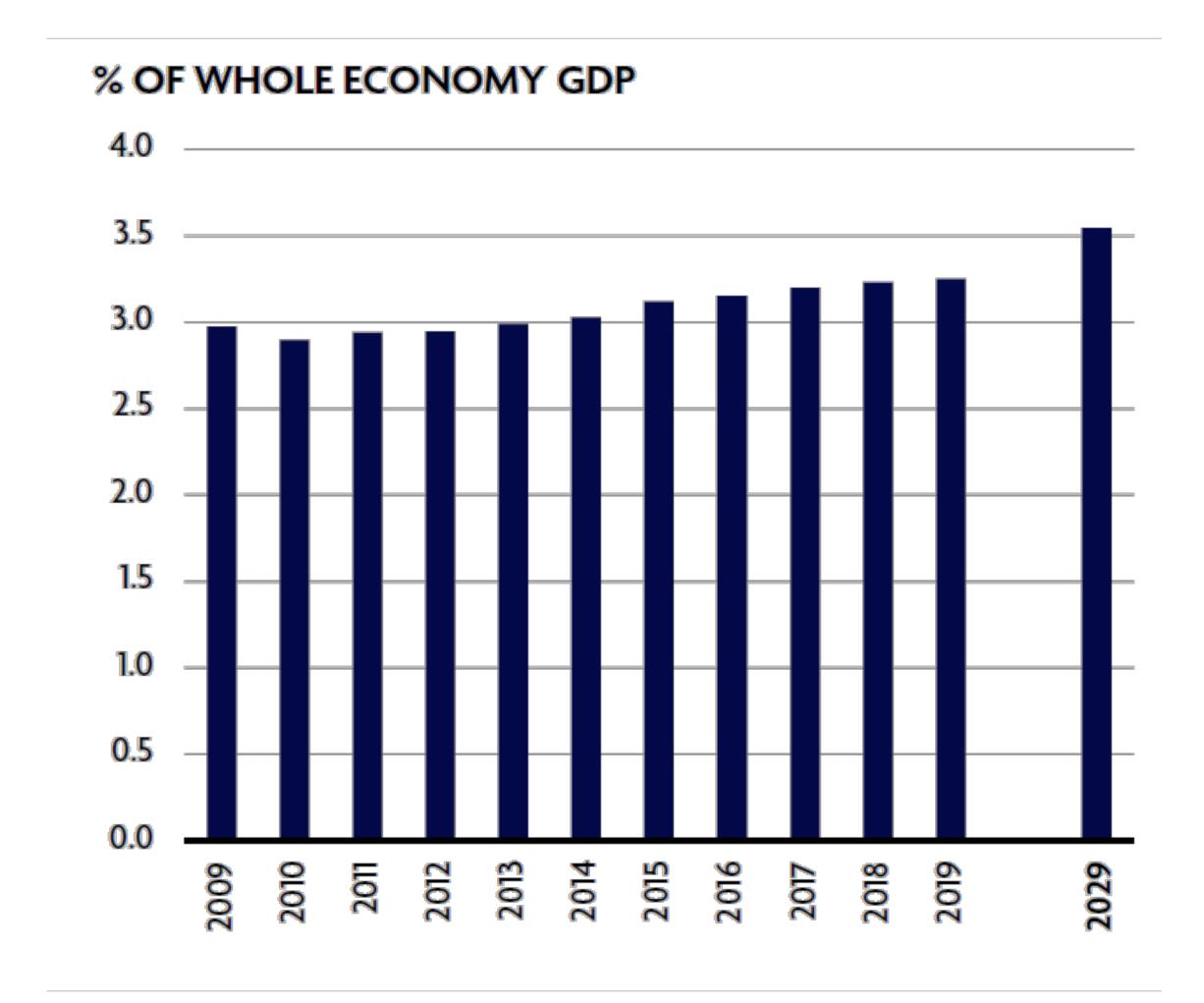




Pre-pandemic, Tourism was expected to expand

INTERNATIONAL TOURIST ARRIVALS 1950 - 2030



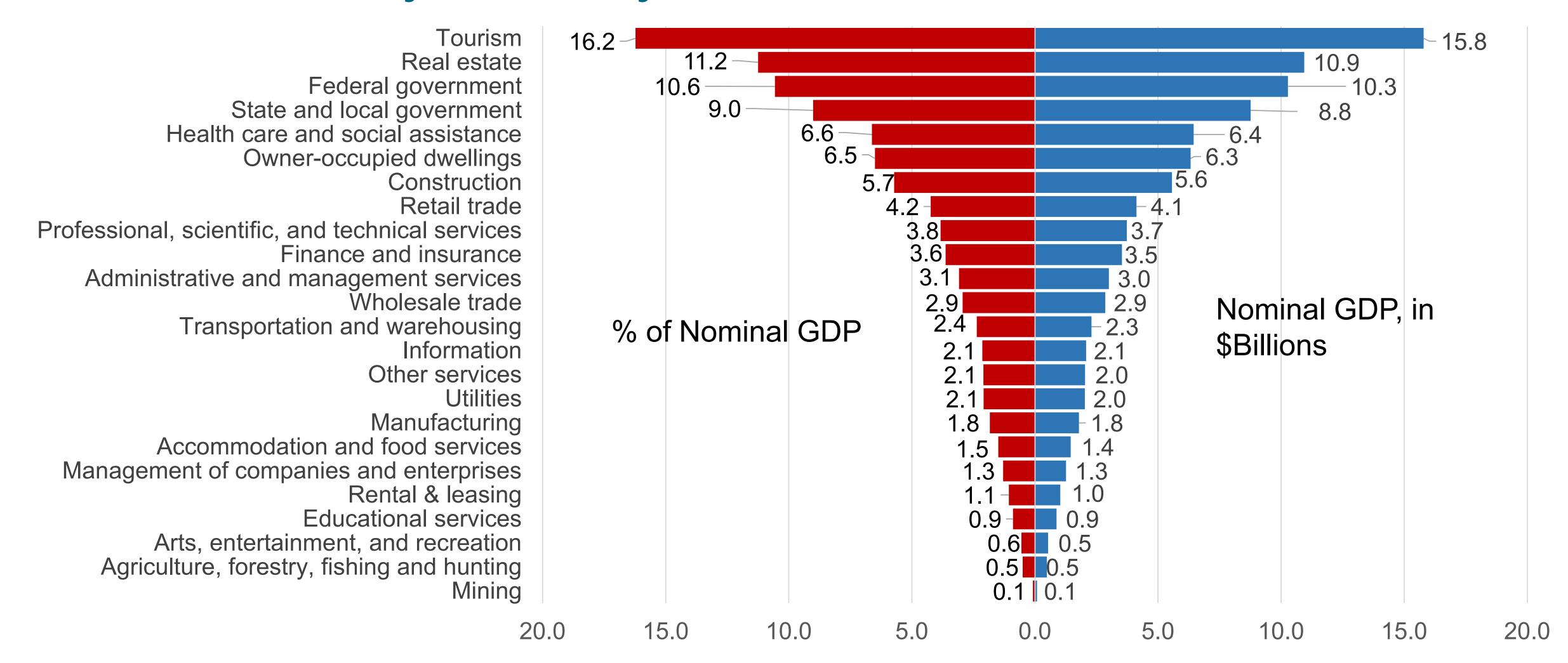


Source: World Tourism Organization (UNWTO)

Source: World Travel & Tourism Council (WTTC)



Hawaii GDP by Industry: 2019 (in current dollars)

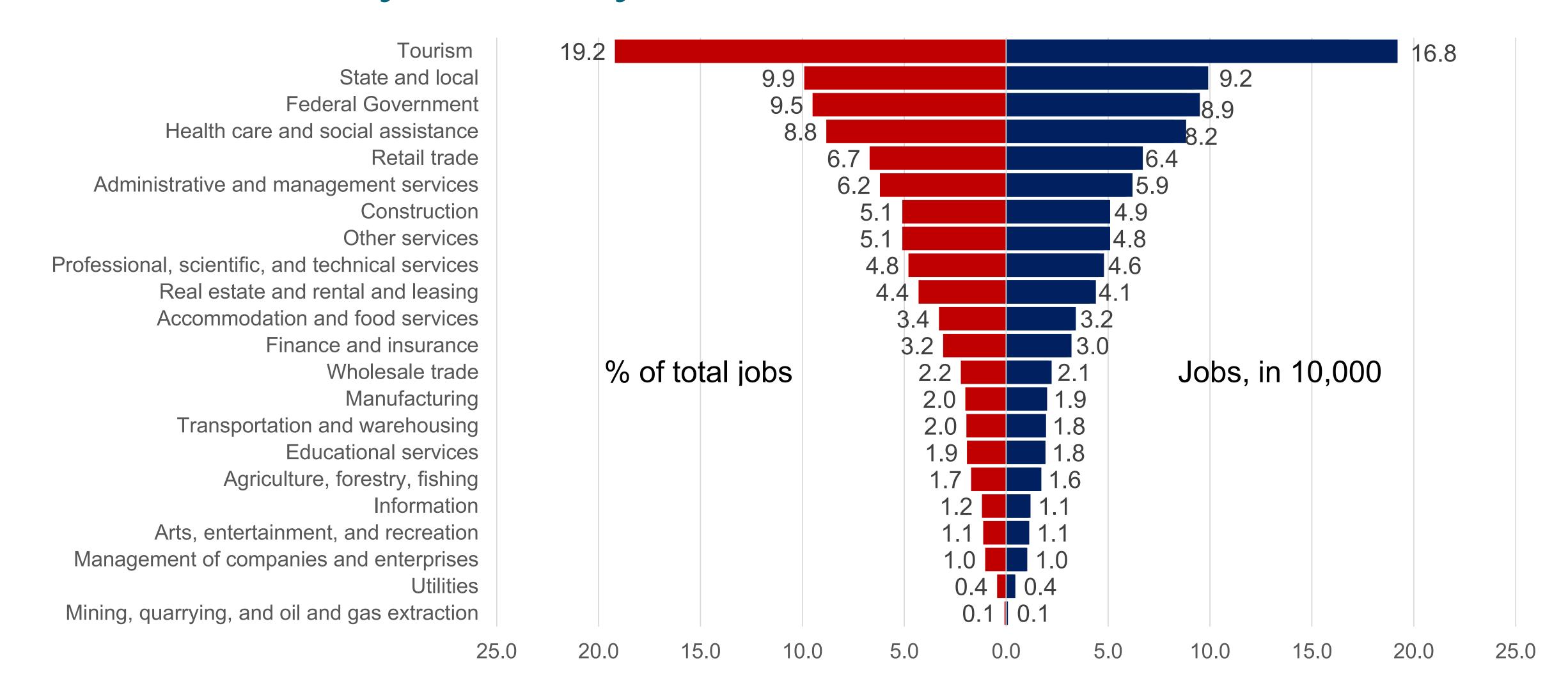








Hawaii Jobs by Industry: 2019 (Includes payroll jobs and proprietors)

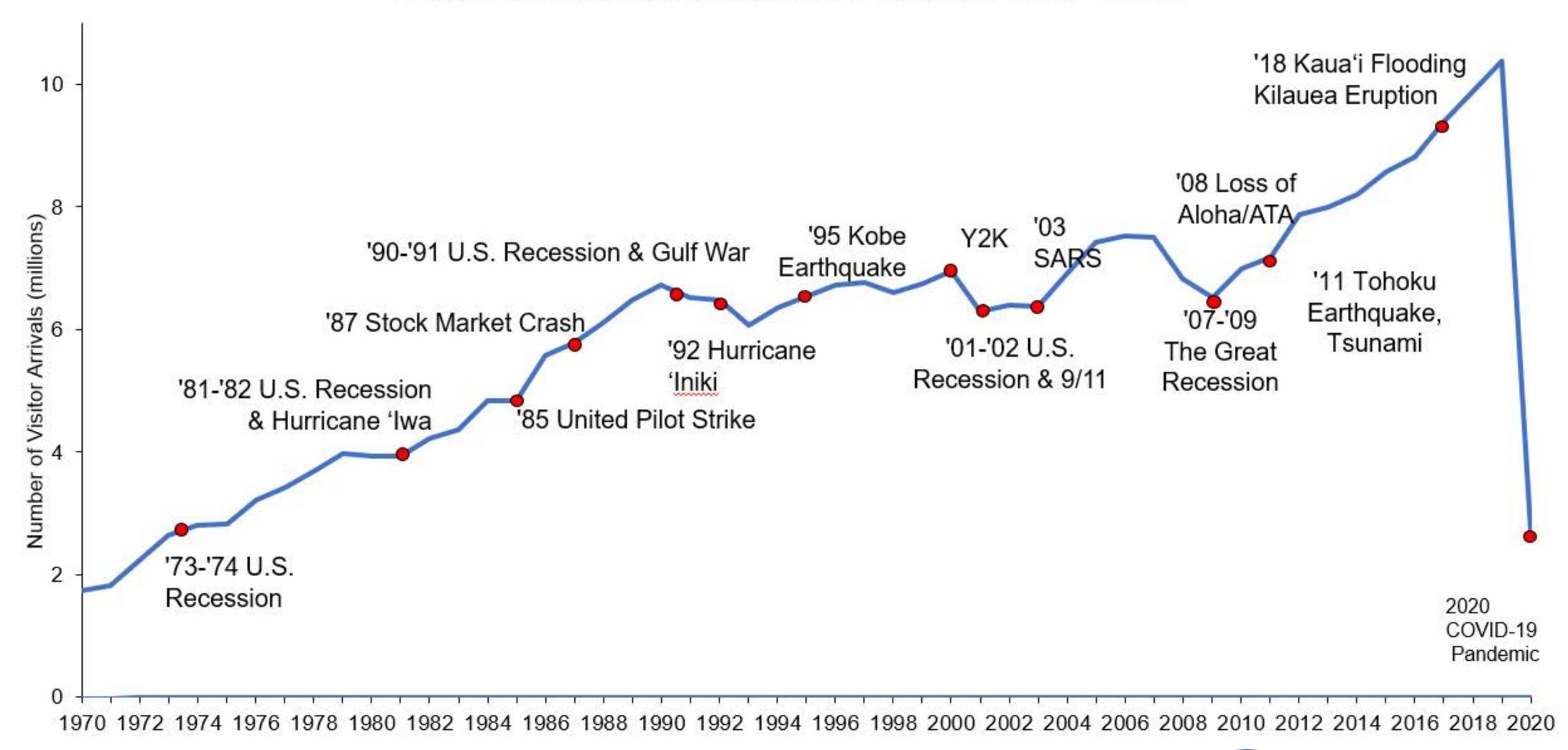


Source: U.S. Bureau of Economic Analysis and DBEDT





Visitor Arrivals to the State of Hawai'i 1970 - 2020



Hawai'i Tourism at a Glance

	2013	2014	2015	2016	2017R	2018	2019	2020
Spending	\$14.52B	\$14.97B (+3.1%)	\$15.11B (+0.9%)	\$15.91B (+5.3%)	\$16.79B (+5.5%)	\$17.64B (+5.1%)	\$17.72B (+1.2%)	\$6.26B ¹ (-64.7%)
Tax Revenue	\$1.54B	\$1.58B (+2.6%)	\$1.71B (+7.0%)	\$1.86B (+8.8%)	\$1.96B (+5.4%)	\$2.08B (+6.8)	\$2.07B (+1.2%)	\$730.6M ² (-64.7%)
Jobs Supported	168K	174K (+3.6%)	177K (+1.7%)	194K (+9.6%)	205K (+5.7%)	217K (+6.8%)	216K (+0.6%)	57K ² (-73.6%)
Arrivals	8.17M	8.32M (+1.8%)	8.68M (+4.3%)	8.93M (+2.9%)	9.40M (+5.3%)	9.95M (+5.9%)	10.39M (+5.0%)	2.7M (-73.9%)
Air Seats	10.9 M	11.3M (+3.7%)	11.9M (+5.7%)	12.0M (+0.7%)	12.2M (+1.8%)	13.2M (+8.3%)	13.6M (+2.9%)	5.3M (-60.9%)

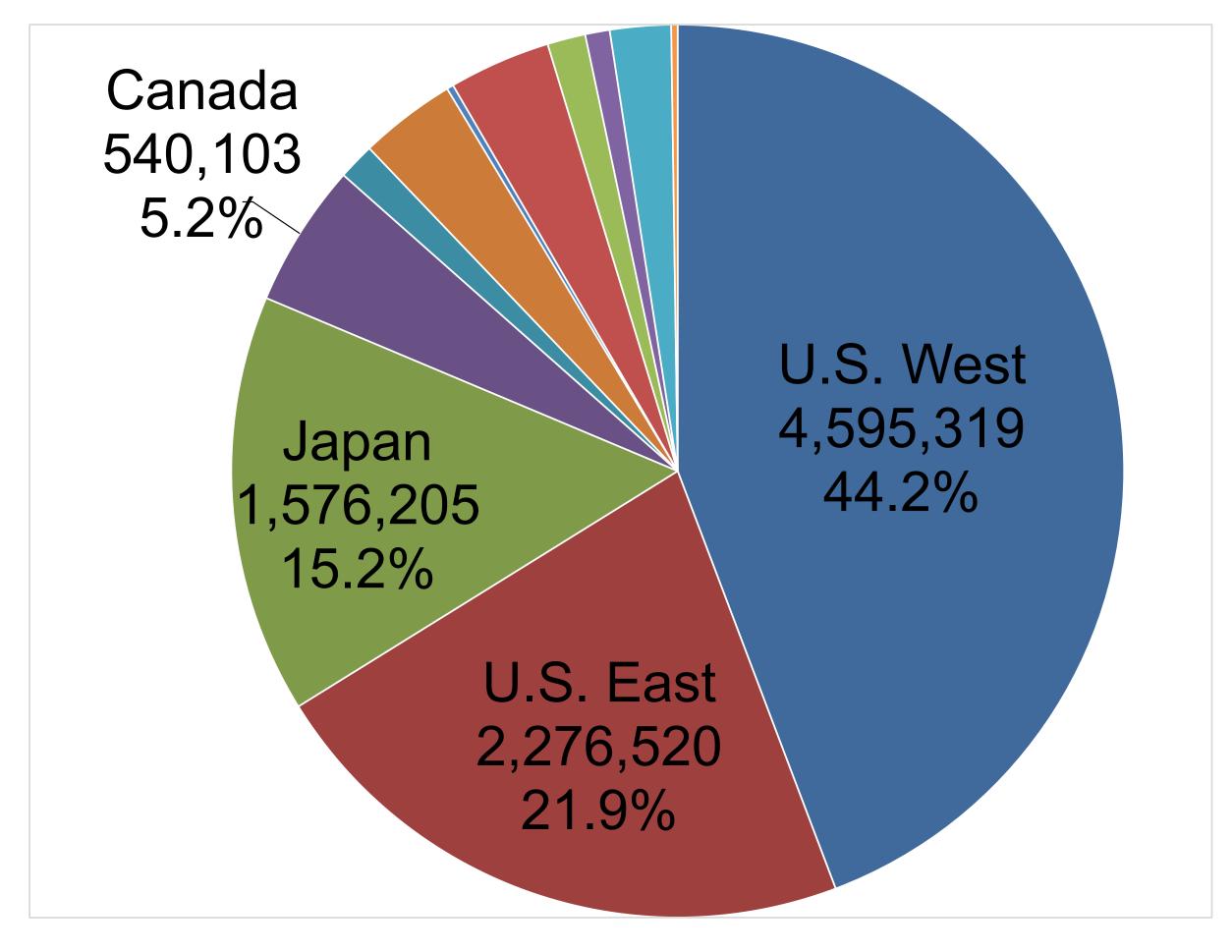
¹ 2020 expenditures 2020 spending statistics from U.S. West and U.S. East visitors were available from January – March, November and December 2020. Visitor surveys were not conducted from April-October 2020 due to COVID-19 restrictions. For Japan, Canada, Other Asia, Oceania, Europe and Latin America, visitor spending data were only available from January-March 2020; data for November and December were not available due to limited samples 2020 expenditures do not include supplemental business spending 22020 tax revenues and jobs were calculated based on available spending data from MMA countries detailed in footnote 2



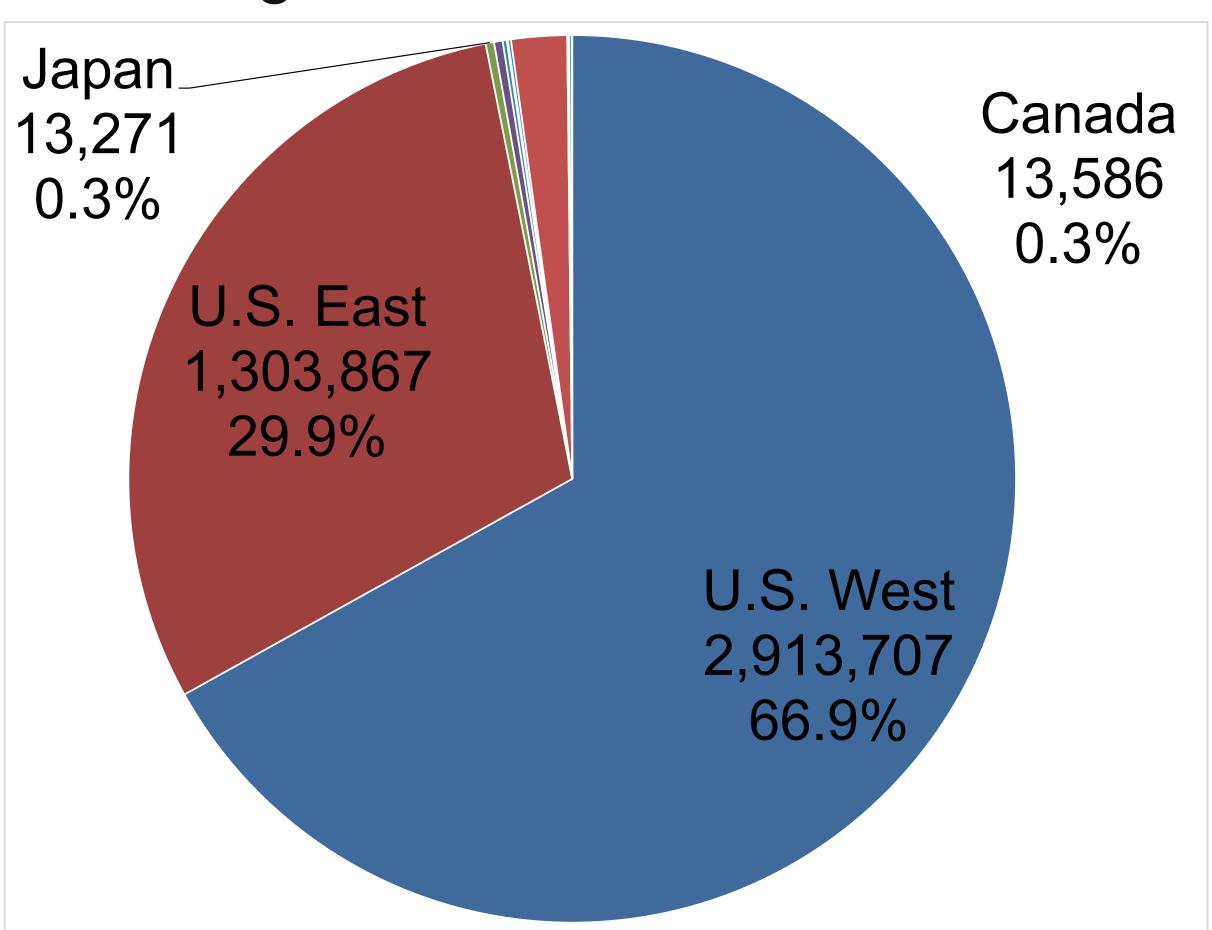


Arrivals to Hawai'i by Market

2019



YTD August 2021P



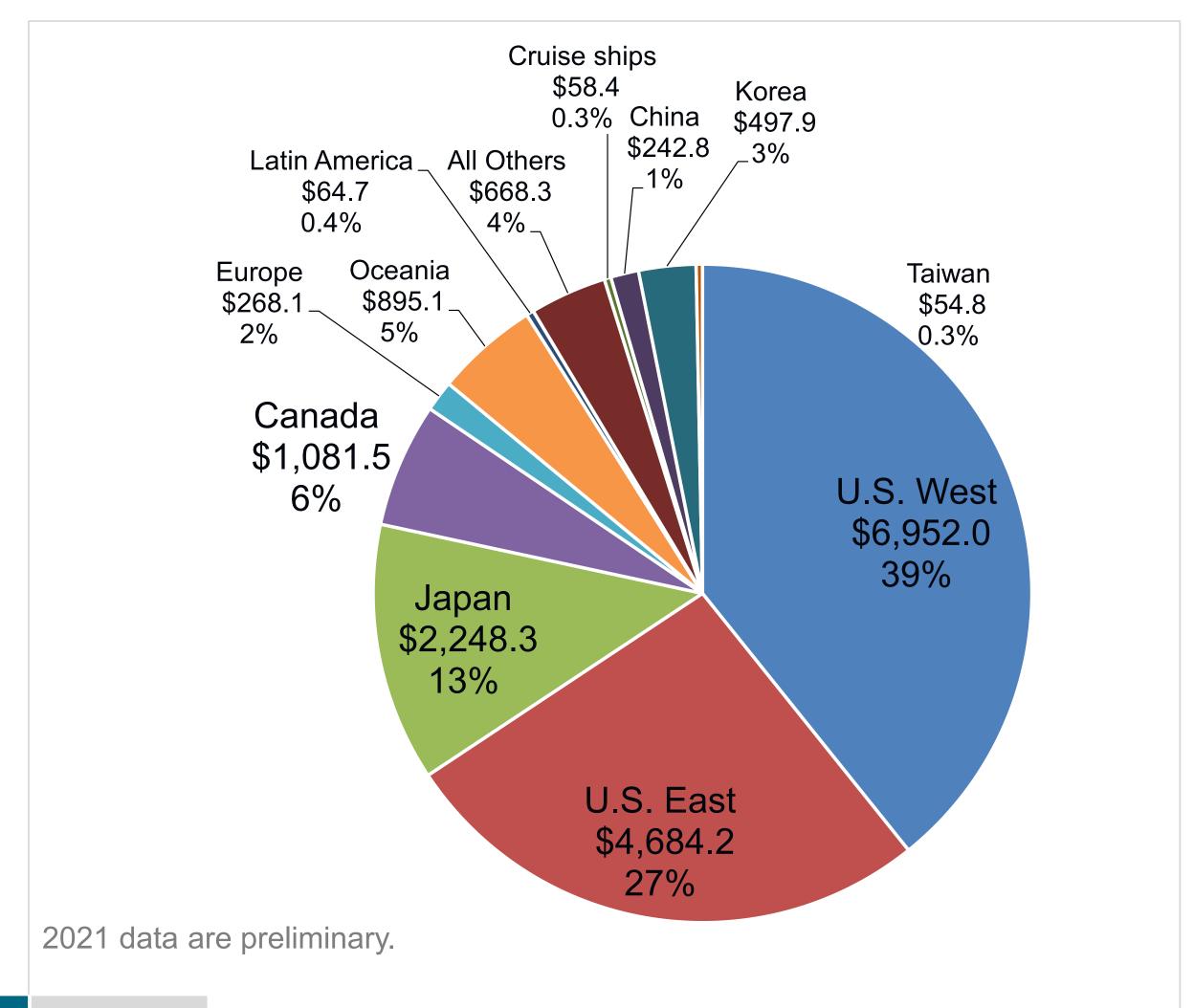
2021 data are preliminary



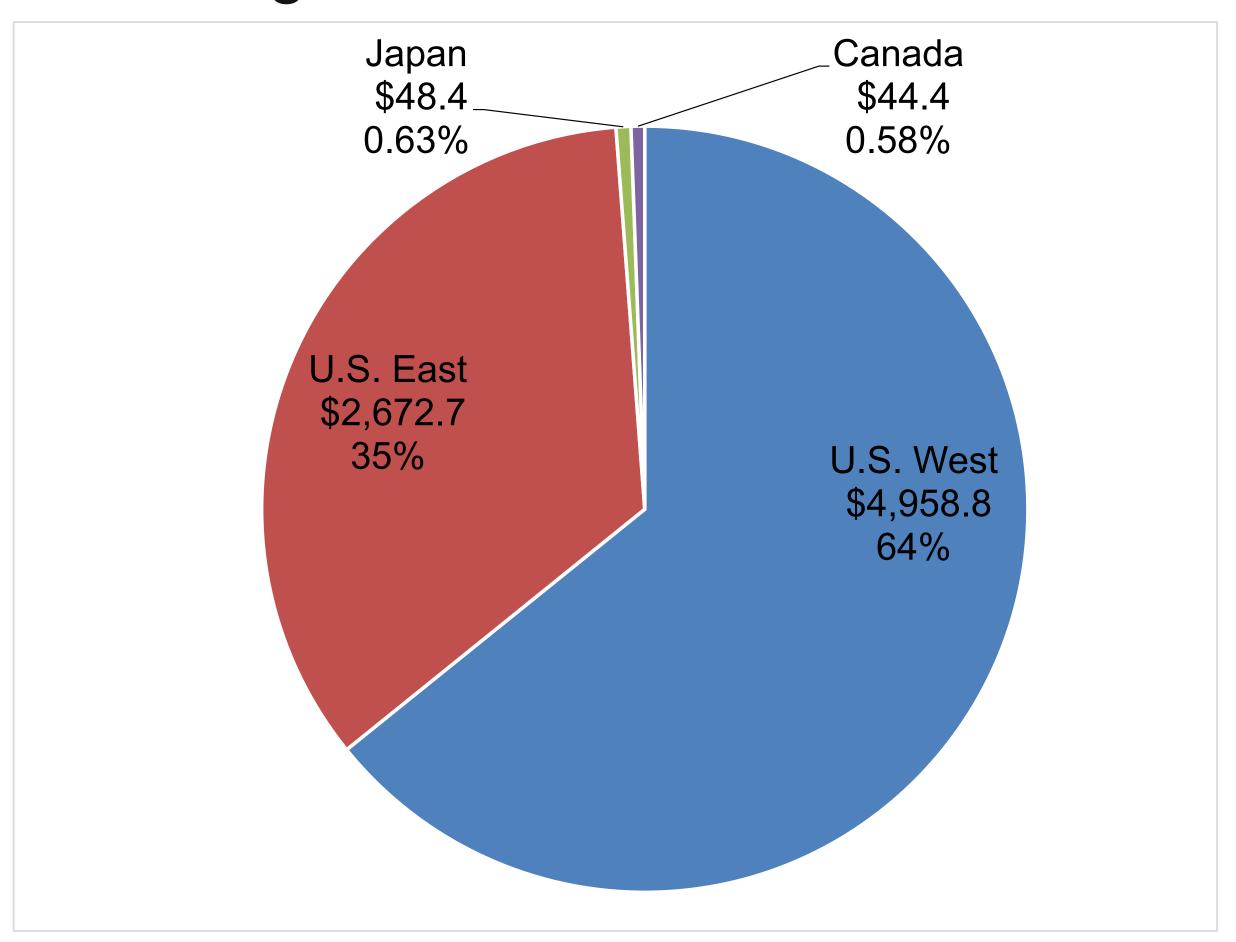


Visitor Spending

2019



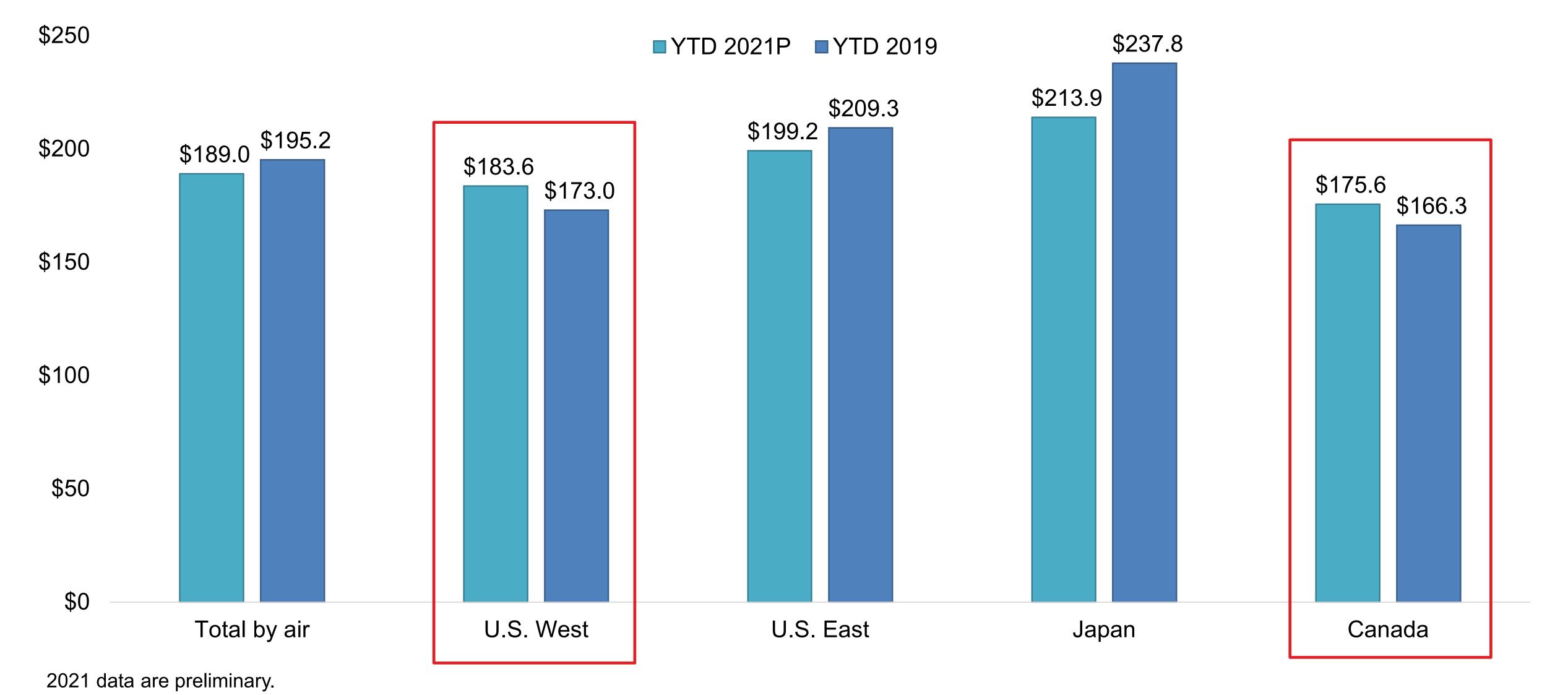
YTD August 2021P







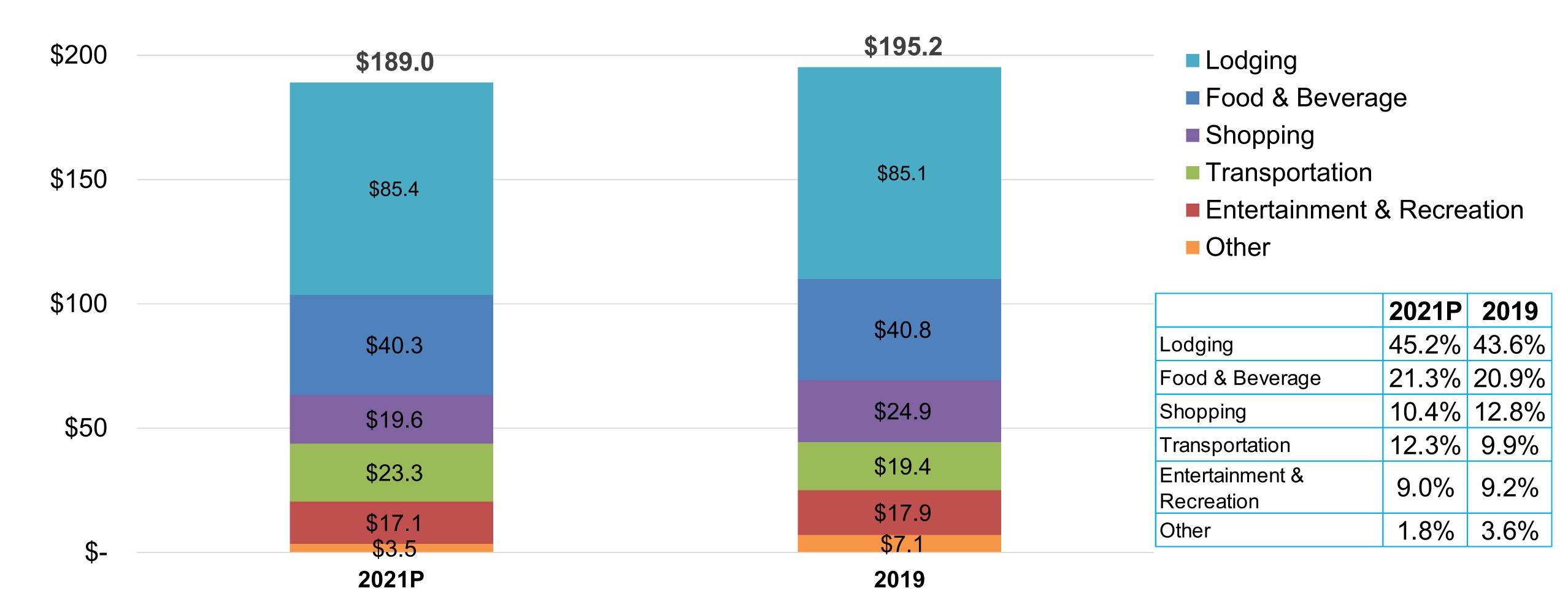
Personal Daily Spending – YTD August







Spending by Category, Visitors by Air – YTD August

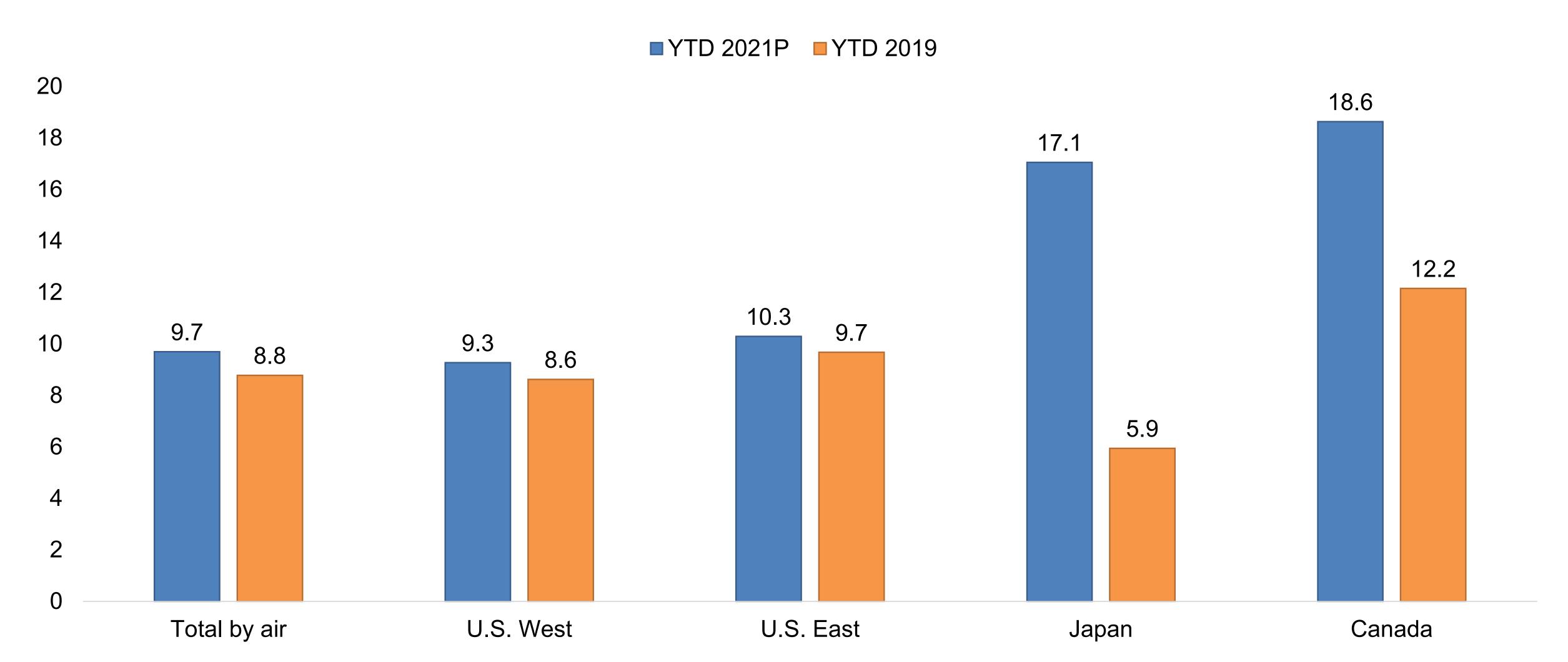


2021 data are preliminary.





Average Length of Stay – YTD August



2021 data are preliminary.





Accommodation Choice – YTD August

	US West		US E	US East		Japan		Canada	
	YTD 2021P	YTD 2019	YTD 2021P	YTD 2019	YTD 2021P	YTD 2019	YTD 2021P	YTD 2019	
Hotel	49.8%	50.1%	57.3%	58.7%	36.3%	82.1%	54.6%	43.5%	
Condo	21.1%	19.0%	16.3%	14.0%	34.5%	13.0%	13.8%	33.0%	
Timeshare	10.8%	10.3%	8.9%	8.7%	5.8%	6.5%	4.8%	8.1%	
Cruise Ship	0.0%	0.7%	0.0%	3.3%	0.5%	0.2%	0.0%	1.6%	
Friends & Relatives	11.1%	11.3%	12.9%	11.5%	21.0%	1.3%	19.4%	4.7%	
Bed & Breakfast	0.8%	1.1%	1.1%	1.3%	0.5%	0.2%	0.8%	1.8%	
Rental House	12.1%	12.9%	11.9%	12.0%	3.0%	0.5%	9.0%	16.3%	
Hostel	0.4%	0.6%	0.6%	0.7%	0.5%	0.1%	1.3%	2.0%	
Camp Site, Beach	0.4%	0.6%	0.6%	0.6%	0.0%	0.1%	0.9%	1.9%	
Private Room in Private Home	0.8%	1.4%	0.9%	1.5%	2.2%	0.3%	1.5%	2.7%	
Shared Room in Private Home	0.2%	0.5%	0.3%	0.6%	0.4%	0.1%	0.4%	0.6%	
Other	1.3%	1.9%	1.5%	1.9%	4.6%	0.2%	2.1%	1.3%	

2021 data are preliminary





Purpose of Trip – YTD August

	Total b	y Air	US W	est	US E	ast	Japa	an	Cana	da
		YTD 2019	YTD 2021P	YTD 2019	YTD 2021P	YTD 2019	YTD 2021P	YTD 2019	YTD 2021P	YTD 2019
Pleasure (Net)		85.0%	88.2%	84.9%	85.1%	81.1%	70.8%	87.3%	85.4%	94.4%
Honeymoon/ Get Married		5.1%	2.9%	2.8%	5.5%	4.1%	1.3%	12.3%	4.0%	2.6%
Honeymoon		4.5%	2.4%	2.2%	4.9%	3.5%	0.9%	11.7%	3.4%	2.4%
Get Married		0.9%	0.6%	0.7%	0.8%	0.8%	0.4%	1.9%	0.8%	0.3%
Pleasure/Vacation		80.5%	86.0%	82.6%	80.5%	77.6%	69.7%	75.8%	81.8%	92.2%
Mtgs/Conventions/ Incentive	1.0%	4.7%	0.9%	3.4%	1.4%	6.4%			1.0%	3.5%
Conventions	0.5%	2.3%	0.4%	1.9%	0.6%	3.6%	0.4%	0.9%	0.3%	2.1%
Corporate Meetings		0.9%	0.3%	1.0%	0.4%	1.4%	1.9%	0.2%	0.5%	
Incentive		1.6%	0.2%	0.7%	0.5%	1.7%	0.3%	4.5%	0.3%	0.9%
Other Business		2.6%	2.0%	3.4%	2.1%	3.5%	3.2%	0.4%	2.9%	0.7%
Visit Friends/Rel.										
Gov't/Military		1.1%	0.5%	0.8%	1.5%	2.3%	0.7%	0.1%	0.2%	0.1%
Attend School		0.3%	0.2%	0.2%	0.3%	0.2%	2.2%	0.4%	0.7%	
Sport Events		0.7%	0.2%	0.8%	0.2%	0.5%	0.5%	0.5%	0.3%	0.7%
			1.8%	3.3%	2.1%	3.5%	3.7%	8.1%	2.3%	

2021 data are preliminary





Scheduled Nonstop Seats to Hawai'i by Port Entry

August	Total			Domestic			International		
	2021	2020	2019	2021	2020	2019	2021	2020	2019
STATE	1,139,215	179,570	1,212,926	1,104,320	166,320	896,563	34,895	13,250	316,363
HONOLULU	578,677	153,101	756,380	547,719	139,851	458,176	30,958	13,250	298,204
KAHULUI	312,045	12,759	257,291	308,108	12,759	248,915	3,937	0	8,376
KONA	138,197	9,850	108,231	138,197	9,850	98,448	0	0	9,783
HILO	5,549	0	4,804	5,549	0	4,804	0	0	0
LIHU'E	104,747	3,860	86,220	104,747	3,860	86,220	0	0	0
				_					
September		Total			omestic		Ir	nternation	al
	2021	2020	2019	2021	2020	2019	2021	2020	2019
STATE	992,137	155,255	1,006,682	957,017	143,709	711,856	35,120	11,546	294,826
HONOLULU	493,573	129,049	660,257	461,918	117,503	382,095	31,655	11,546	278,162
KAHULUI	274,826	13,195	204,791	271,361	13,195	197,711	3,465	0	7,080
KONA	119,662	9,453	74,540	119,662	9,453	64,956	0	0	9,584
HILO	3,759	0	3,486	3,759	0	3,486	0	0	0
LIHU'E	100,317	3,558	63,608	100,317	3,558	63,608	0	0	0

Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of September 20, 2021, subject to change





Scheduled Nonstop Seats to Hawai'i by Port Entry

October		Total		Domestic			International			
	2021	2020	2019	2021	2020	2019	2021	2020	2019	
STATE	1,020,294	221,716	1,057,045	974,796	207,560	760,985	45,498	14,156	296,060	
HONOLULU	503,283	154,259	673,909	464,990	140,103	399,574	38,293	14,156	274,335	
KAHULUI	284,254	31,068	222,366	277,397	31,068	211,816	6,857	0	10,550	
KONA	125,658	23,045	83,243	125,484	23,045	72,590	174	0	10,653	
HILO	3,759	0	4,648	3,759	0	4,648	0	0	0	
LIHU'E	103,340	13,344	72,879	103,166	13,344	72,357	174	0	522	
November		Total			Domestic			International		
	2021	2020	2019	2021	2020	2019	2021	2020	2019	
STATE	1,100,485	437,024	1,066,503	961,648	421,726	764,288	138,837	15,298	302,215	
HONOLULU	566,515	234,788	656,979	461,712	219,490	395,176	104.803	15.298	261.803	
KAHULUI	296,069	107,560	231,519	273,375	107,560	209,739	22,694	0	21,780	
KONA	129,688	45,458	93,017	122,002	45,458	78,213	7,686	0	14,804	

4,296

49,218

100,263

Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of September 27, 2021, subject to change

49,218

4,296

103,917

3,818

81,170



3,654

3,818

77,342



3,828

HILO

LIHU'E

Scheduled Nonstop Seats to Hawai'i by Port Entry

December	Total			Domestic			International		
	2021	2020	2019	2021	2020	2019	2021	2020	2019
STATE	1,303,784	595,932	1,240,436	1,074,129	557,760	898,261	229,655	38,172	342,175
HONOLULU	686,572	328,050	750,881	511,536	297,754	456,929	175,036	30,296	293,952
KAHULUI	340,272	175,410	277,908	307,168	167,534	250,970	33,104	7,876	26,938
KONA	154,700	77,725	115,152	138,057	77,725	98,565	16,643	0	16,587
HILO	4,654	0	4,316	4,654	0	4,316	0	0	0
LIHU'E	117,586	14,747	92,179	112,714	14,747	87,481	4,872	0	4,698

Source: HTA/DBEDT READ analysis based on scheduled flights from Diio Mi flight schedules as of September 27, 2021, subject to change





Visitor Satisfaction Study

Q2 2021

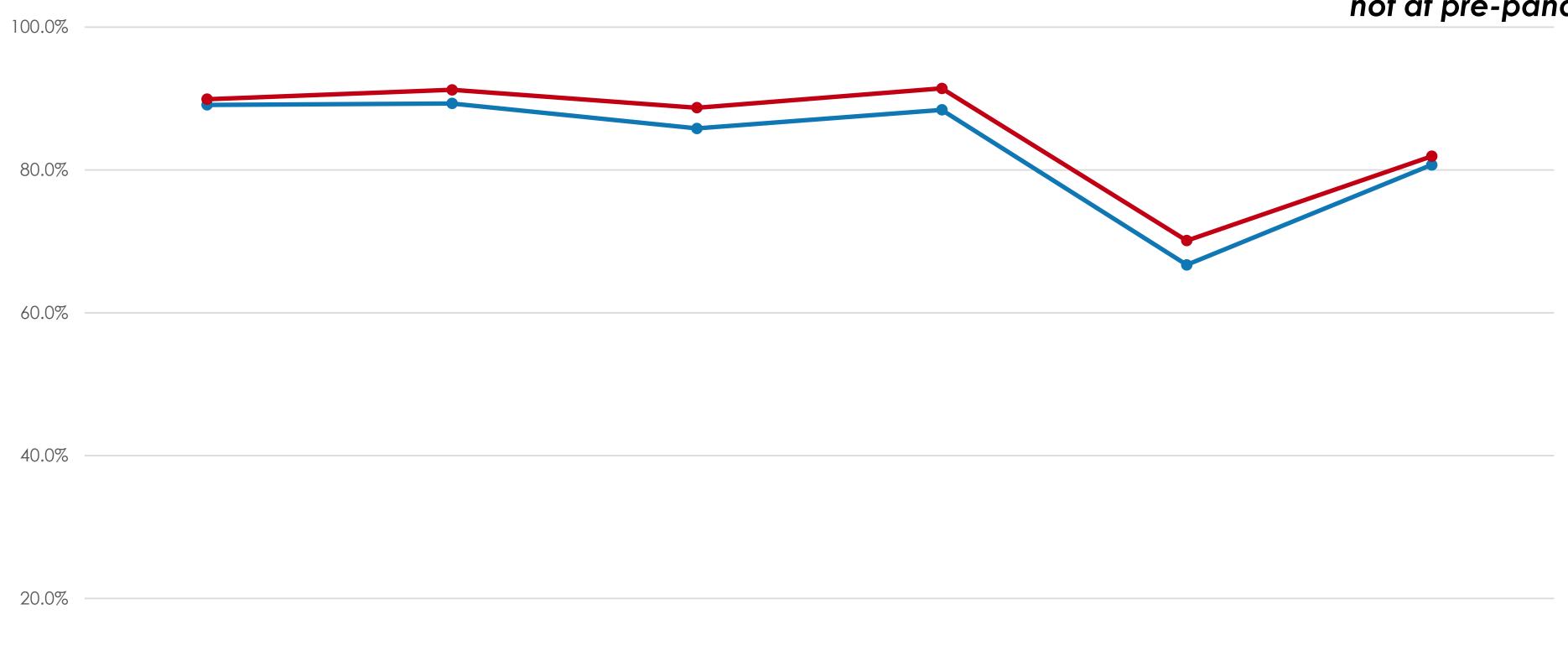
Prepared for: Hawai'i Tourism Authority



SATISFACTION – STATE OF HAWAI'I BY MMA

Tracking Data – Rating of "Excellent" (7-8)

TopBox satisfaction scores have rebounded but are still not at pre-pandemic levels.

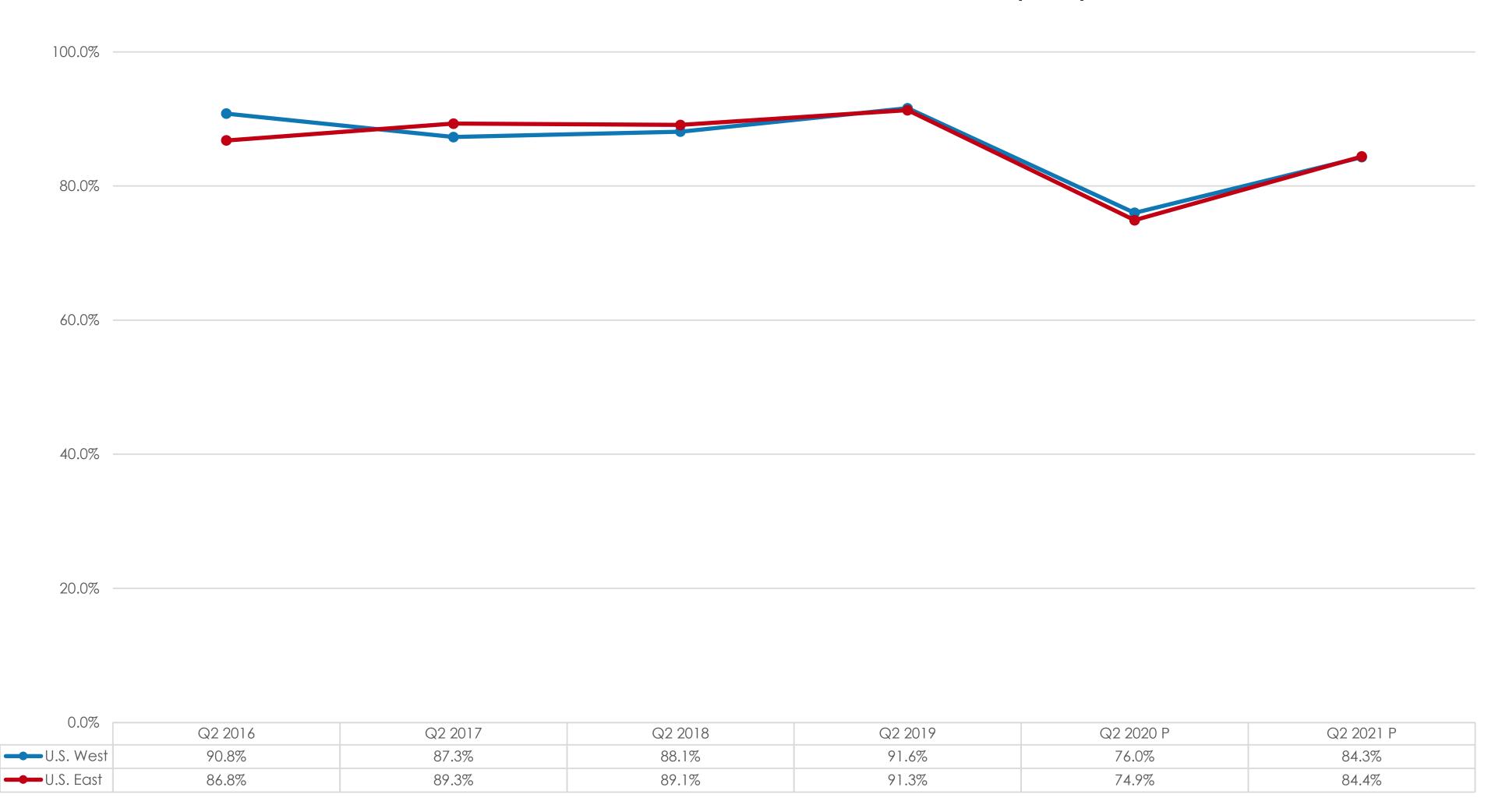


0.0%						
	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020 P	Q2 2021 P
U.S. West	89.1%	89.3%	85.8%	88.4%	66.7%	80.7%
─ U.S. East	89.9%	91.2%	88.7%	91.4%	70.1%	81.9%

P= Preliminary Data

BRAND/DESTINATION – ADVOCACY

TRACKING – TOP BOX "VERY LIKELY" (7-8)

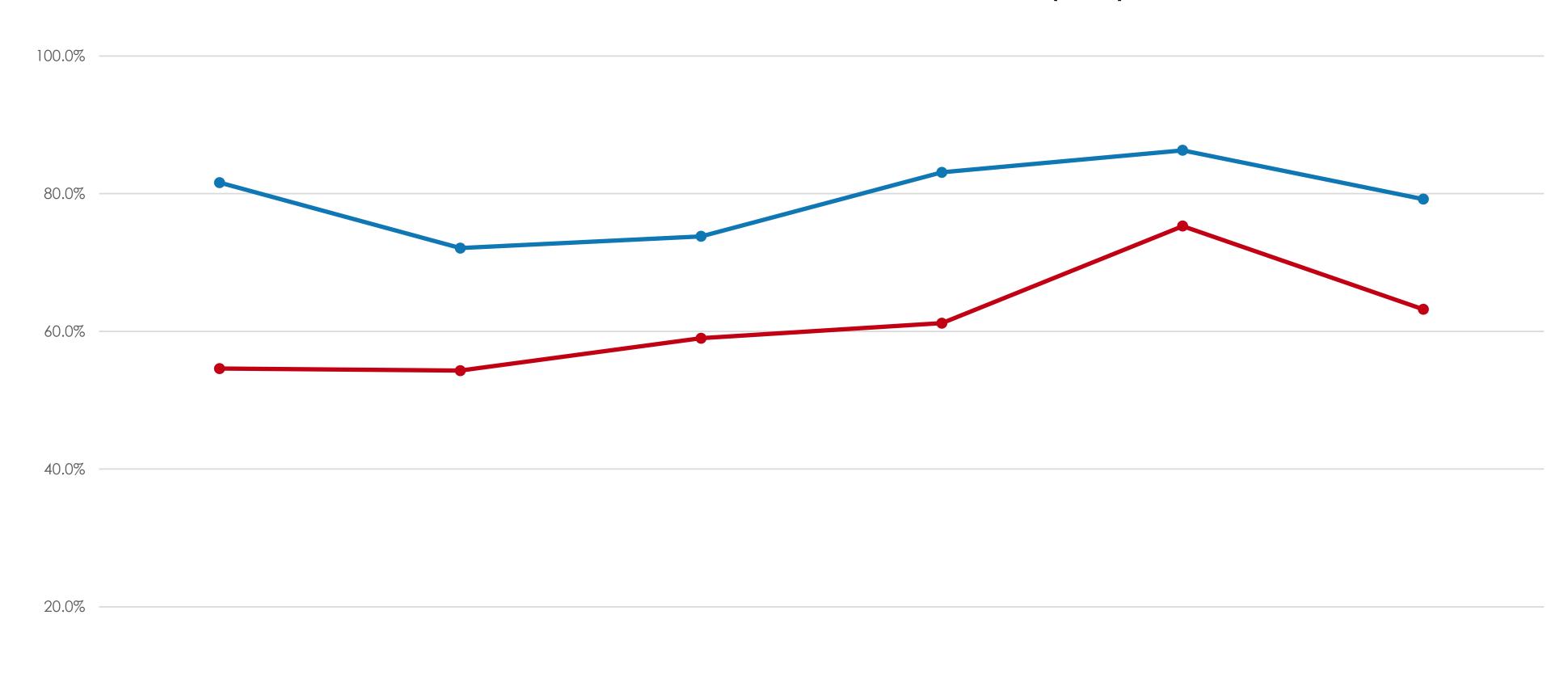


P= Preliminary Data

Q. How likely are you to recommend the state of Hawai'i as a vacation place to your friends and relatives?

LIKELIHOOD OF RETURN VISIT

TRACKING - TOP BOX "VERY LIKELY" (7-8)

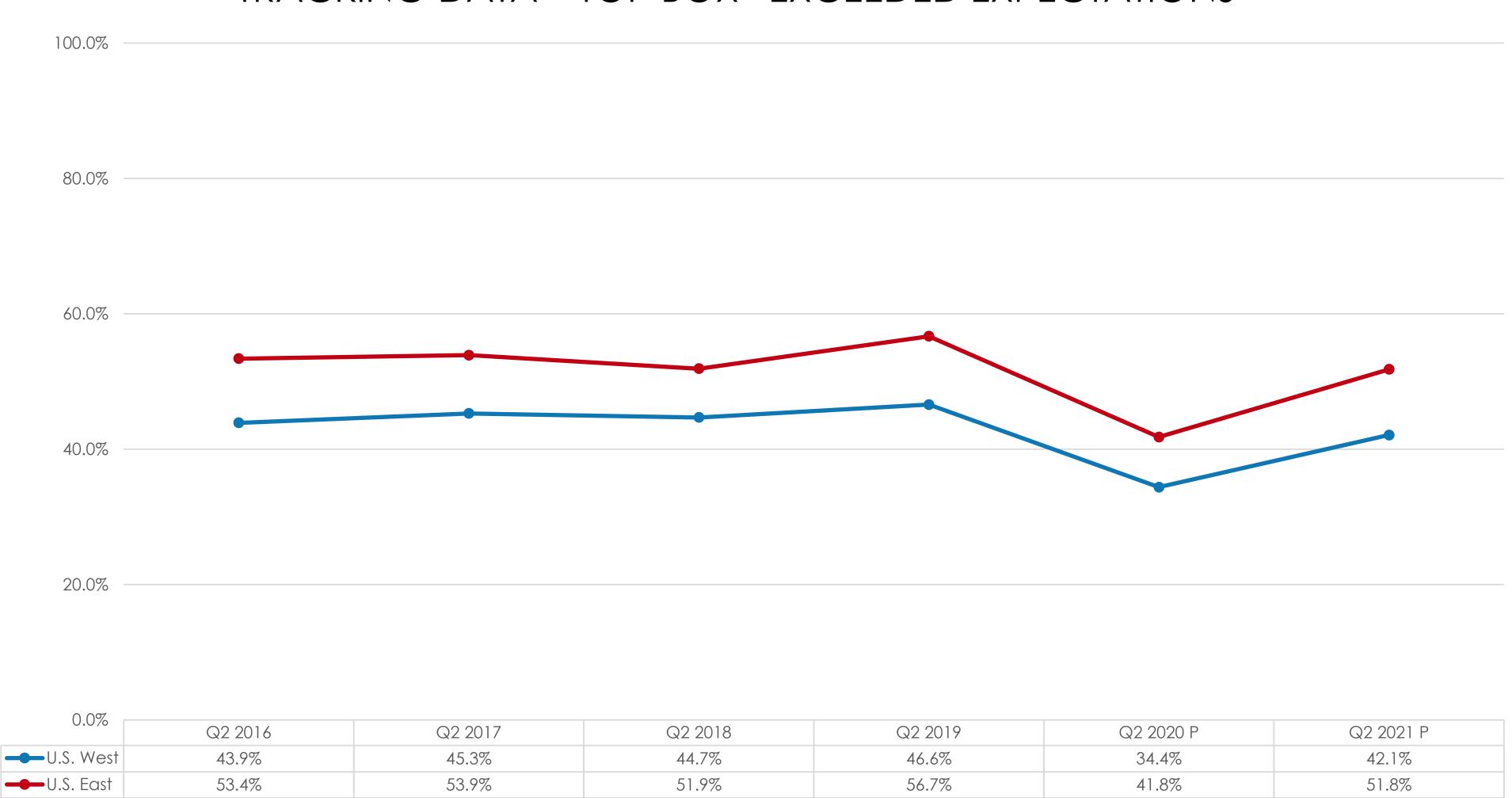


0.0%						
0.070	Q2 2016	Q2 2017	Q2 2018	Q2 2019	Q2 2020 P	Q2 2021 P
U.S. West	81.6%	72.1%	73.8%	83.1%	86.3%	79.2%
U.S. East	54.6%	54.3%	59.0%	61.2%	75.3%	63.2%

P= Preliminary Data

SATISFACTION – HAWAI'I TRIP EXPECTATIONS

TRACKING DATA – TOP BOX "EXCEEDED EXPECTATIONS"



P= Preliminary Data

ATTRACTIONS – O'AHU

	U.S. West	U.S. East
Atlantis Submarine & Cruises	1.6%	3.2%
Bernice P. Bishop Museum	3.2%	3.2%
Byodo-In Temple	10.6%	12.1%
Chinatown & Honolulu Art District	14.8%	11.3%
Diamond Head State Monument	32.0%	39.6%
Dole Plantation	31.8%	36.9%
Haleiwa	32.1%	27.6%
Hanauma Bay Nature Reserve	12.8%	11.9%
Harold L. Lyon Arboretum	0.8%	0.9%
Hawai'i State Art Museum	1.7%	1.0%
Honolulu Museum of Art	2.2%	1.5%
Hawaiian Mission Houses, Historic Site and Archive	0.6%	1.6%
Hawaiʻi's Plantation Village	2.1%	2.9%
Honolulu Zoo	8.9%	8.9%





AUTHORITY

HTA Resident Sentiment Survey 2021 Highlights



Prepared for the: Hawai'i Tourism Authority: Project #5782 June 2021



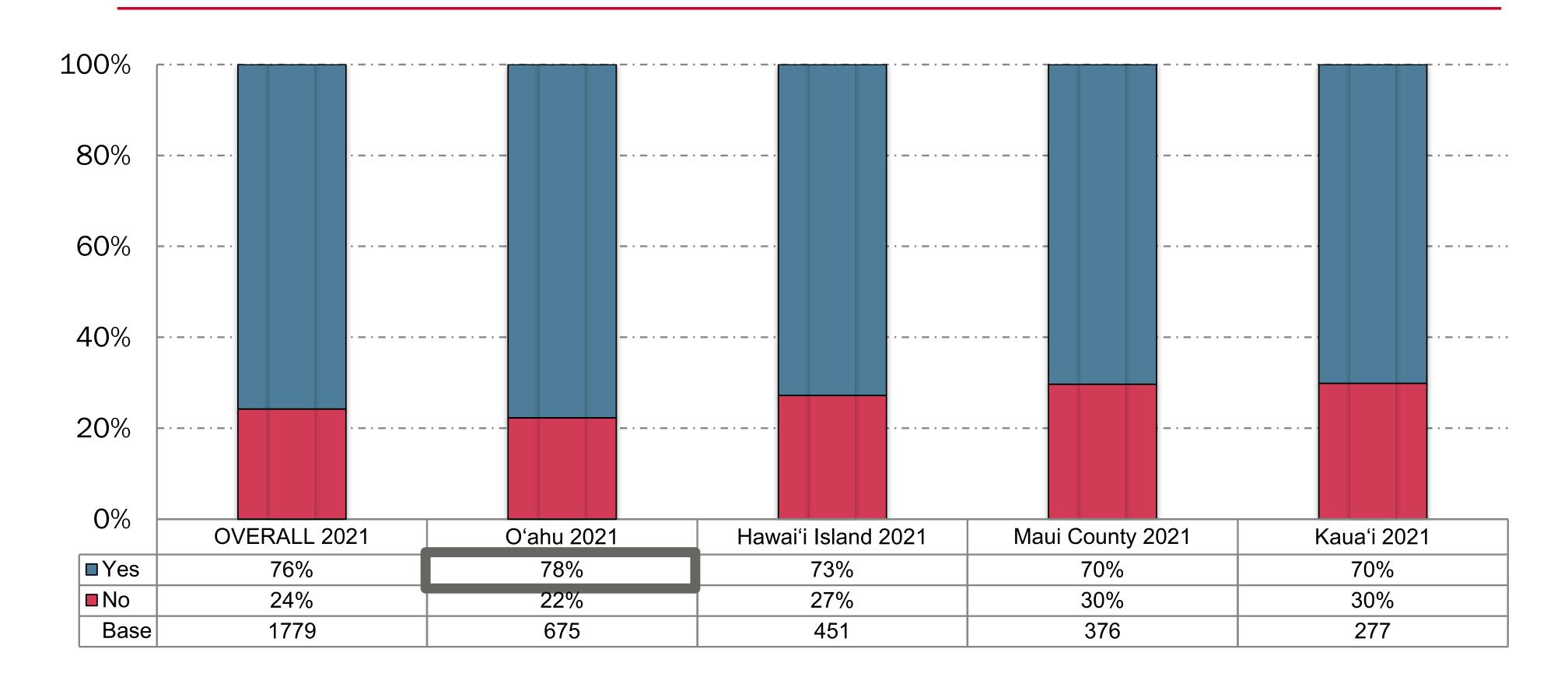
Davies Pacific Center 1250, 841 Bishop Street, Honolulu, Hawai'i 96813 Telephone: 1-808-528-4050 omnitrak@omnitrakgroup.com



Is Tourism in Hawai'i Worth it?

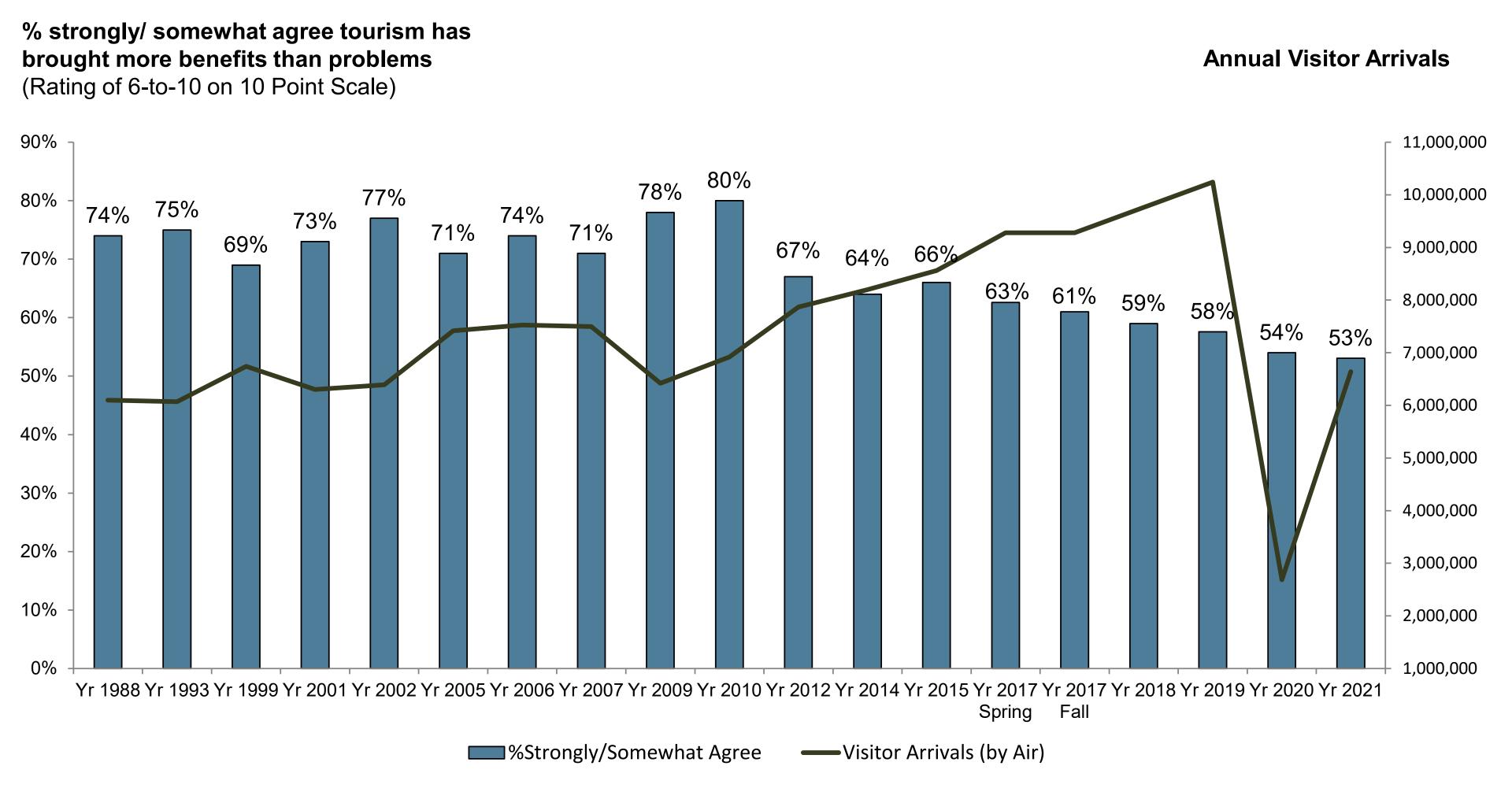


"Do you think tourism is worth the issues associated with the industry?" – *By Island*



Q3. In 2019, visitors spent nearly \$18 billion in Hawai'i, which produced \$2 billion in state tax revenues to support local schools, hospitals, and infrastructure. Do you think tourism is worth the issues associated with the industry?

"Tourism has brought more benefits than problems"

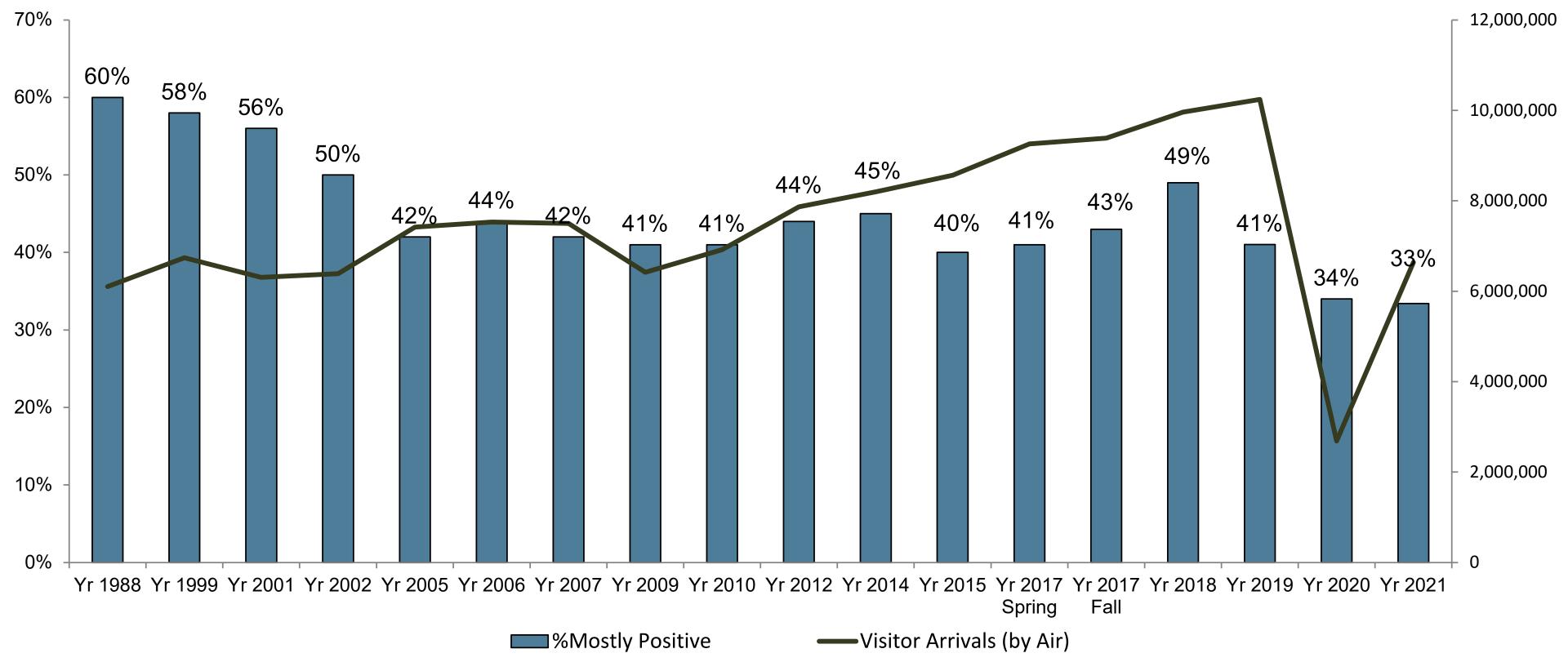


Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.



Impact on You & Your Family

% saying Tourism has been "mostly positive" for you and your family (Rating of 7-to-10 on 10 Point Scale) Annual Visitor Arrivals



Q2b. Using a 10-point scale where 10 means Extremely Positive and 1 means Extremely Negative, how would you rate the overall impact tourism has on...you and your family?

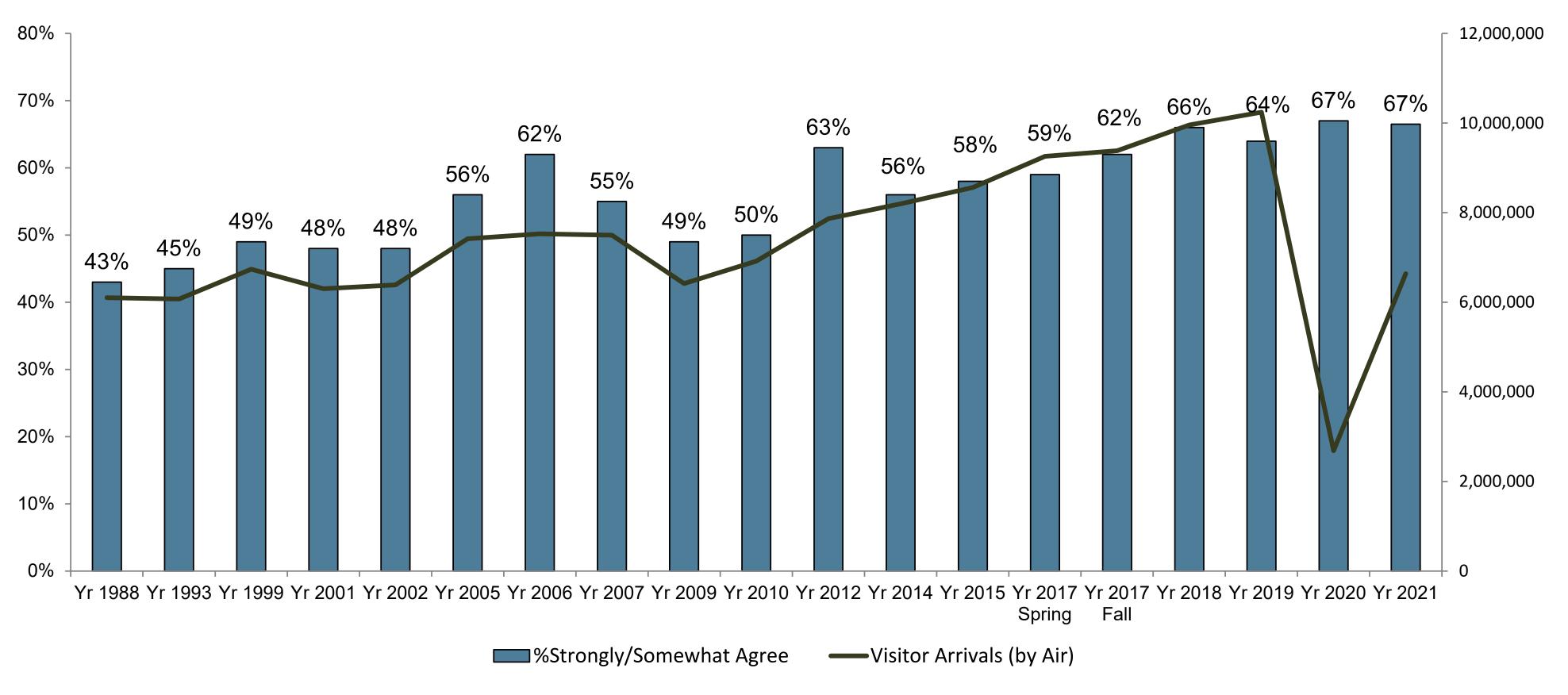




"Island is being run for tourists at the expense of local people"

% strongly/ somewhat agree island is being run for tourists at expense of local people (Rating of 6 to 10)

Annual Visitor Arrivals



Q.4. I'm going to read you some statements about tourism, and ask you to please tell me how much you agree or disagree with each statement using a scale of 1 to 10 with 10 being Completely Agree and 1 meaning Do Not Agree At All. You can choose any number between 1 and 10.



SYMPHONY DASHBOARD

https://www.hawaiitourismauthority.org/research/symphony-dashboards/

July 2021

Month July 2021



State of Hawaii

Island Summary

Residents

Lodging Summary

Visitors

Visitor Arrivals

Total visitors & % change YOY (Jul. 2021 vs. Jul. 2019)

879.6K ▼-11.6%

Visitor Spending

Total visitors & % change YOY (Jul. 2021 vs. Jul. 2019)

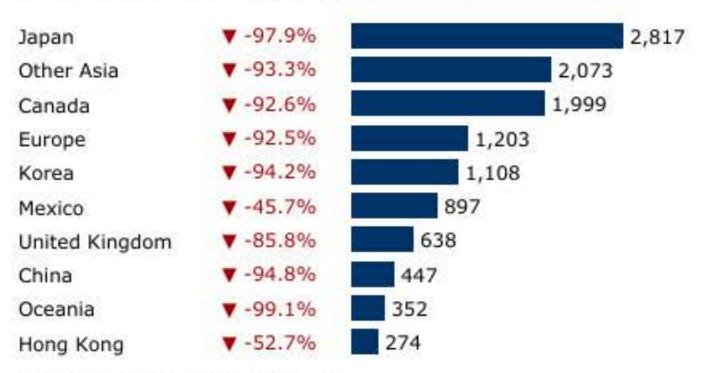
\$1,580.7M **v**-6.8%

Average Length of Stay All visitors, July 2021

9.4 Days

Top-10 International Markets

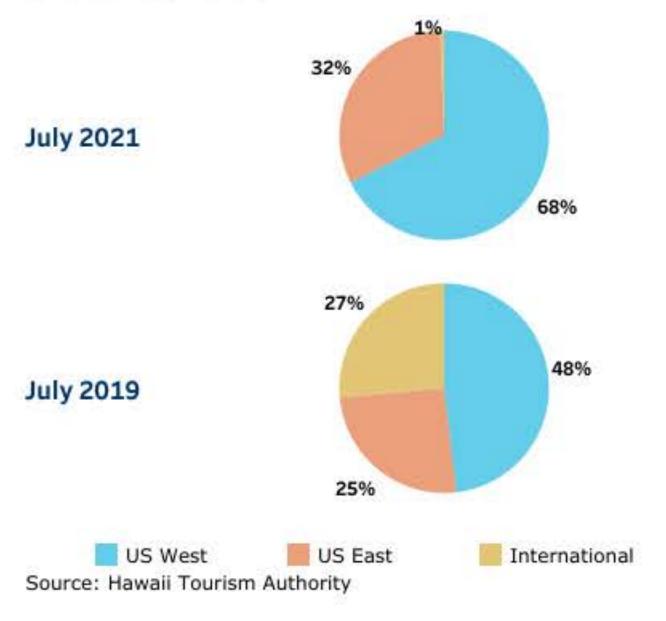
Total visitors and % change YOY (Jul. 2021 vs. Jul. 2019)



Source: Hawaii Tourism Authority

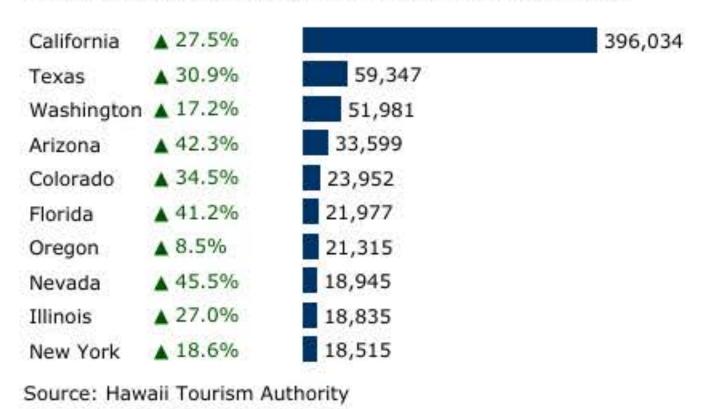
Market Share by Origin Markets

% share of total visitors



Top-10 Domestic Markets

Total visitors and % change YOY (Jul. 2021 vs. Jul. 2019)



Top-30 Points of Interest Visited

Ranked by most visited POI by visitors, % share of visits by residents and visitors in July 2021

Kalakaua Avenue	Oahu	45%	55%
Lahaina Bypass	Maui Island	48%	52%
Kailua town and beach	Oahu	80%	20%
Kapahulu Avenue	Oahu	62%	38%
Kapiolani Park	Oahu	56%	44%
Royal Hawaiian Shopping Center	Oahu	40%	60%
Front Street in Lahaina	Maui Island	42%	58%
Ala Moana Shopping Center	Oahu	76%	24%
Upcountry Maui	Maui Island	85%	
Honolulu Watershed Forest Reserve	Oahu	77%	23%
Ko Olina Resort	Oahu	43%	57%
Chinatown	Oahu	89	9% 11%
International Marketplace	Oahu	42%	58%
Kailua-Kona Town	Hawaii Island	49% 51%	
Whalers Village Shopping Center	Maui Island	34% 66%	
Kahului Airport Car Rental location	Maui Island	36% 64%	
Hana/Road to Hana	Maui Island	55% 45%	
Lahaina Cannery Mall	Maui Island	47% 53%	
Kaanapali Kai Golf Course	Maui Island	41%	59%
Lahaina Market Place Shopping Center	Maui Island	36%	64%
Paia Town	Maui Island	51%	49%
Kuhio Beach Park	Oahu	33%	67%
Waikiki Beach	Oahu	31% 69%	
Fort DeRussy Beach Park	Oahu	30%	70%
Pearl Harbor National Memorial	Oahu	25%	75%
Kahana Valley State Park	Oahu	58% 42%	
Ahupuaa O Kahana State Park	Oahu	58%	42%
Honolulu Zoo	Oahu	50%	50%
Azeka Shopping Center	Maui Island	59%	41%
The Shops at Wailea	Maui Island	42%	58%

^{*} Residents refer to residents of the State of Hawaii, all islands

Source: near (formerly UberMedia)

Hawaii Island Summary

July 2021

July 2021

Month

Island Hawaii Island

and



State of Hawaii

Island Summary

Lodging Summary

Visitor Arrivals

Total visitors & % change YOY (Jul. 2021 vs. Jul. 2019)

149.4K ▼-14.1%

Visitor Spending

Total visitors & % change YOY (Jul. 2021 vs. Jul. 2019)

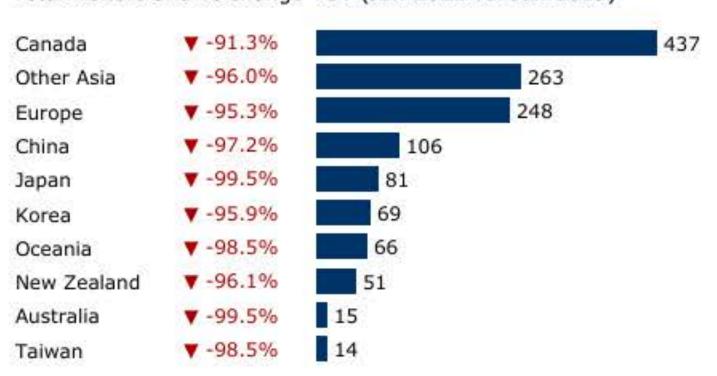
\$220.3M **v**-0.5%

Average Length of Stay All visitors, July 2021

8.6 Days

Top-10 International Markets

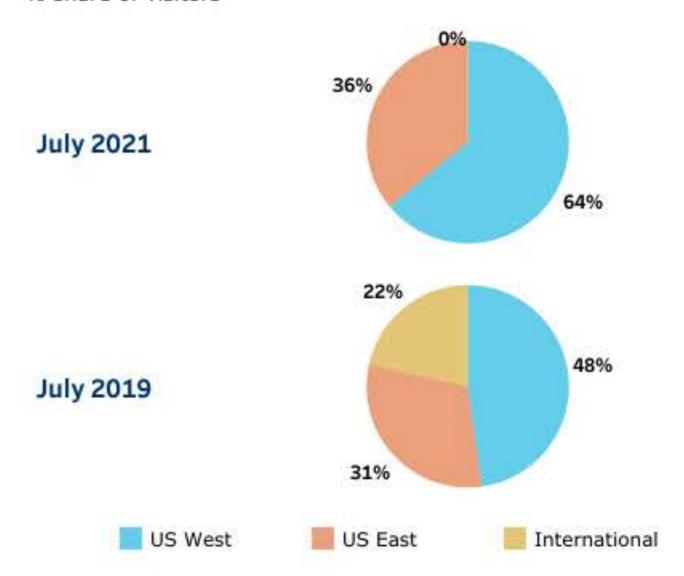
Total visitors and % change YOY (Jul. 2021 vs. Jul. 2019)



Source: Hawaii Tourism Authority

Origin Market Share

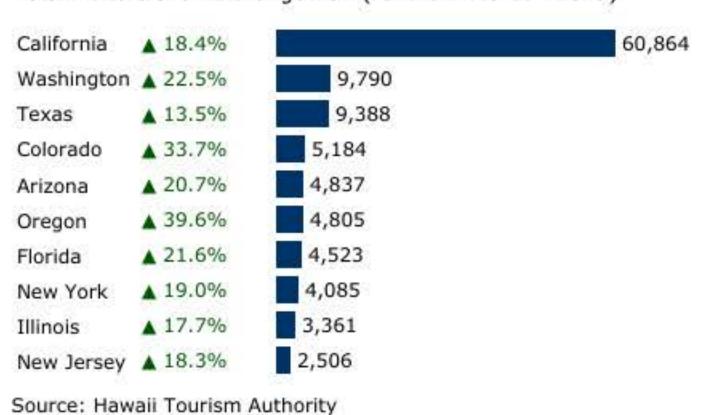
% share of visitors



Source: Hawaii Tourism Authority

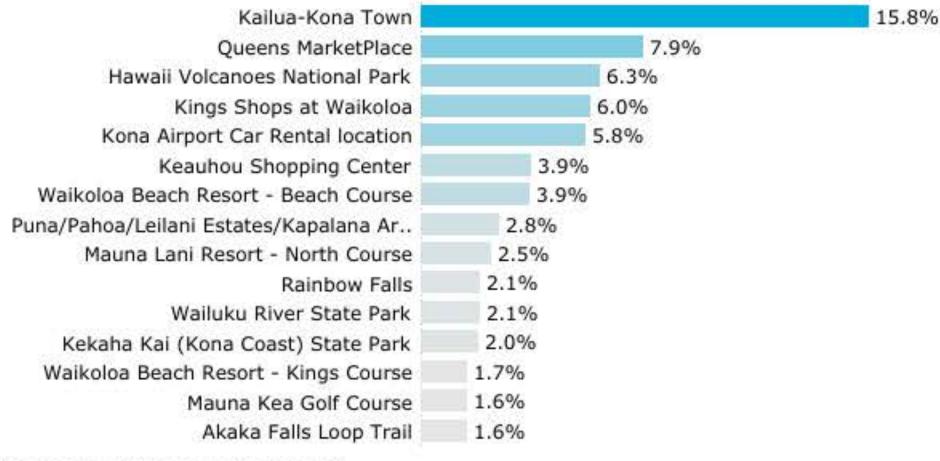
Top-10 Domestic Markets

Total visitors and % change YOY (Jul. 2021 vs. Jul. 2019)



Top-15 Points of Interest by Visitors

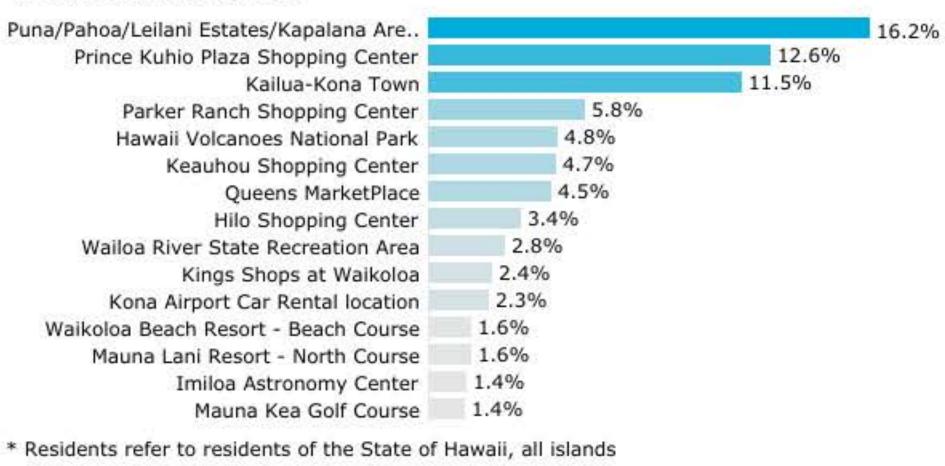
% share of visits, July 2021



Source: near (formerly UberMedia)

Top-15 Points of Interest by Residents

% share of visits, July 2021



Source: near (formerly UberMedia)

State of Hawaii Lodging Summary

Occupancy

July 2021

July 2021

Month

Island

State of Hawaii

YOY



Island Summary



HAWAI'I TOURISM

AUTHORITY

Month Performance & YOY % Change

July 2021 vs. July 2019

YOY

YOY

Demand

	의명의 위에게 많은 때마다 되었다. 그림에					
Total	82.2%	▼ -0.4%	2,243.5K	▼ -12.7%	1,845.1K	▼ -13.1%
Hotel	82.4%	▼ -2.9%	1,650.6K	▼ -1.5%	1,359.8K	▼ -4.8%
Short-term Rentals	81.8%	▲ 4.2%	592.9K	▼ -33.7%	485.3K	▼ -30.1%

Supply

Timeshare**

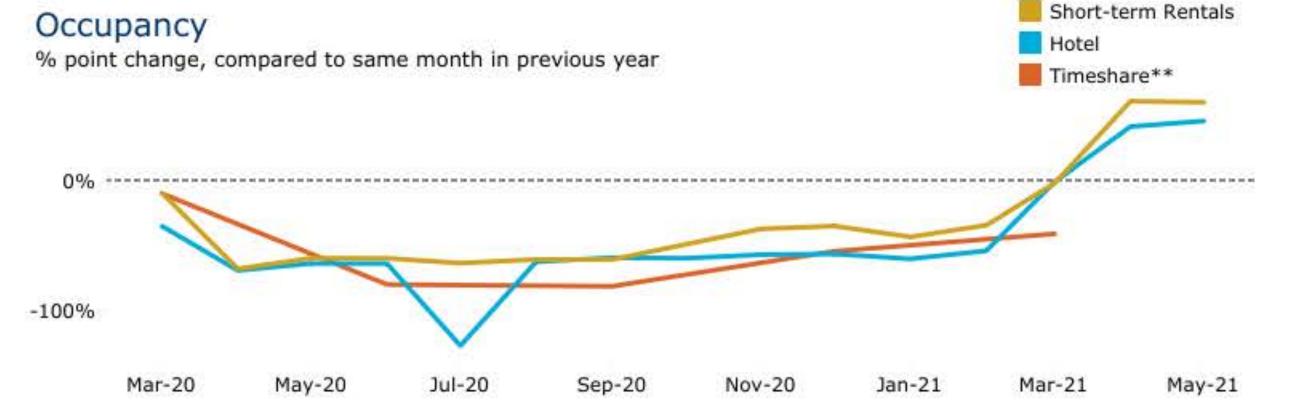
YTD Calendar Year & YOY % Change

YTD July 2021 vs. YTD July 2019

Total	56.2%	▲ 8.6%	15,941.3K	▲ 9.2%	8,961.1K	▲ 28.9%
Hotel	53.3%	▲ 7.9%	10,911.1K	▲ 18.9%	5,818.7K	▲ 39.6%
Short-term Rentals	64.2%	▲ 11.8%	4,136.8K	▲ 9.2%	2,656.2K	▲ 33.8%
Timeshare**	54.4%	▲ 5.7%	893.4K	▼ -45.6%	486.2K	▼ -39.2%

Note: OCC YOY change is percentage point change

Source: STR; Transparent; and Hawaii Tourism Authority

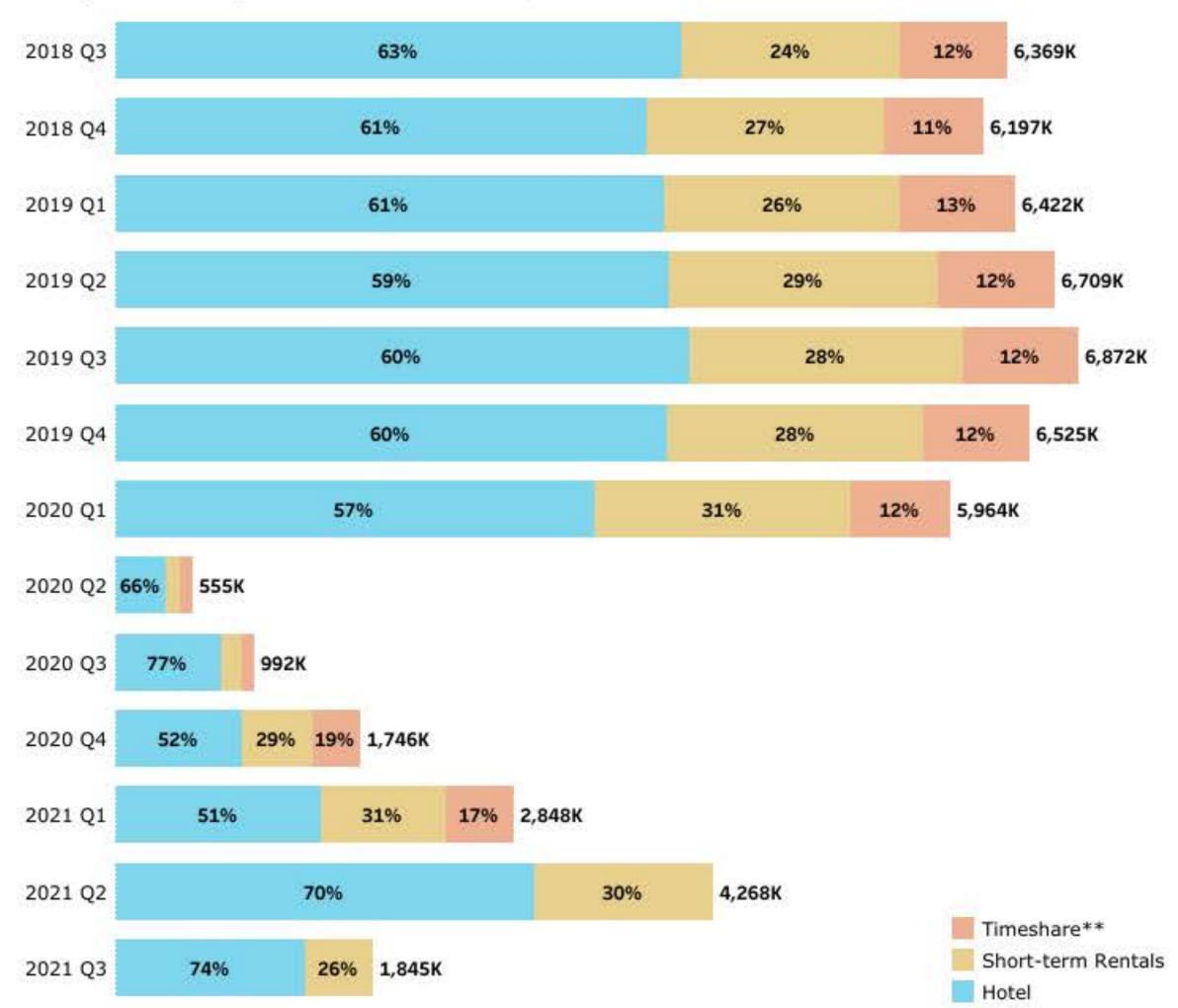


^{**} Timeshare information is only available after the end of each quarter

Source: STR; Transparent; and Hawaii Tourism Authority

Distribution of Room Nights Sold

Room nights sold in July 2021 and % share of total, State of Hawaii



*2021 Q2 does not include timeshare data. Timeshare information is only available after the end of each quarter

^{* 2021} are relative to 2019. All other years are true YOY comparisons

^{**} Timeshare information is only available after the end of each quarter

Hawaii Island Visitation Insights for Visitors

Date Range: 01-Jul-21 to 31-Jul-21

Island From Date Hawaii Island 01-Jul-21

To Date 31-Jul-21

15.9%

Origin Country United States of America Origin State Name

Visitors

Residents

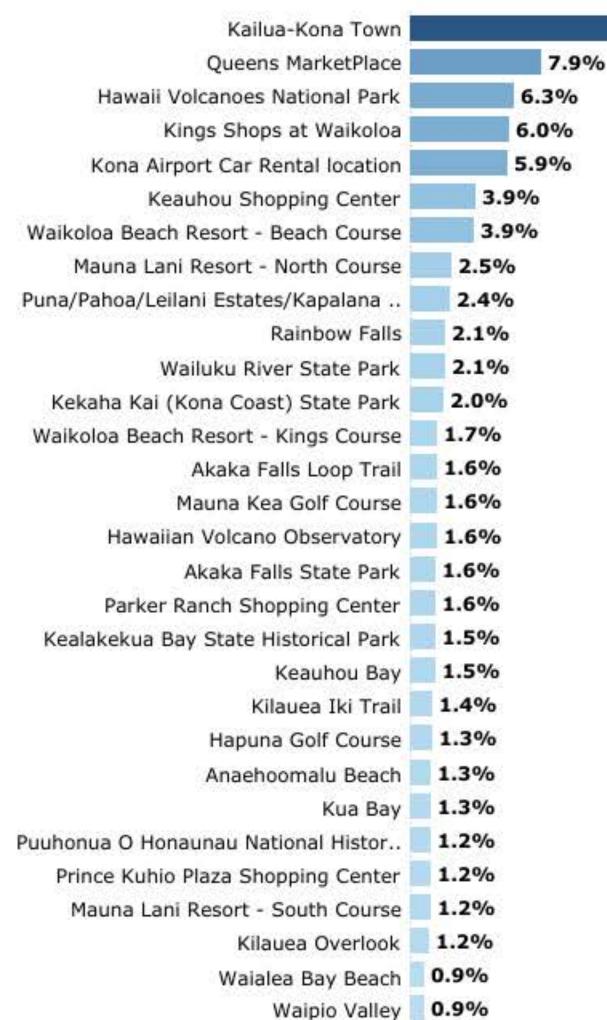
HAWAI'I TOURISM.

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Top-30 Points of Interest on Hawaii Island

% share of visits by visitors to Hawaii Island

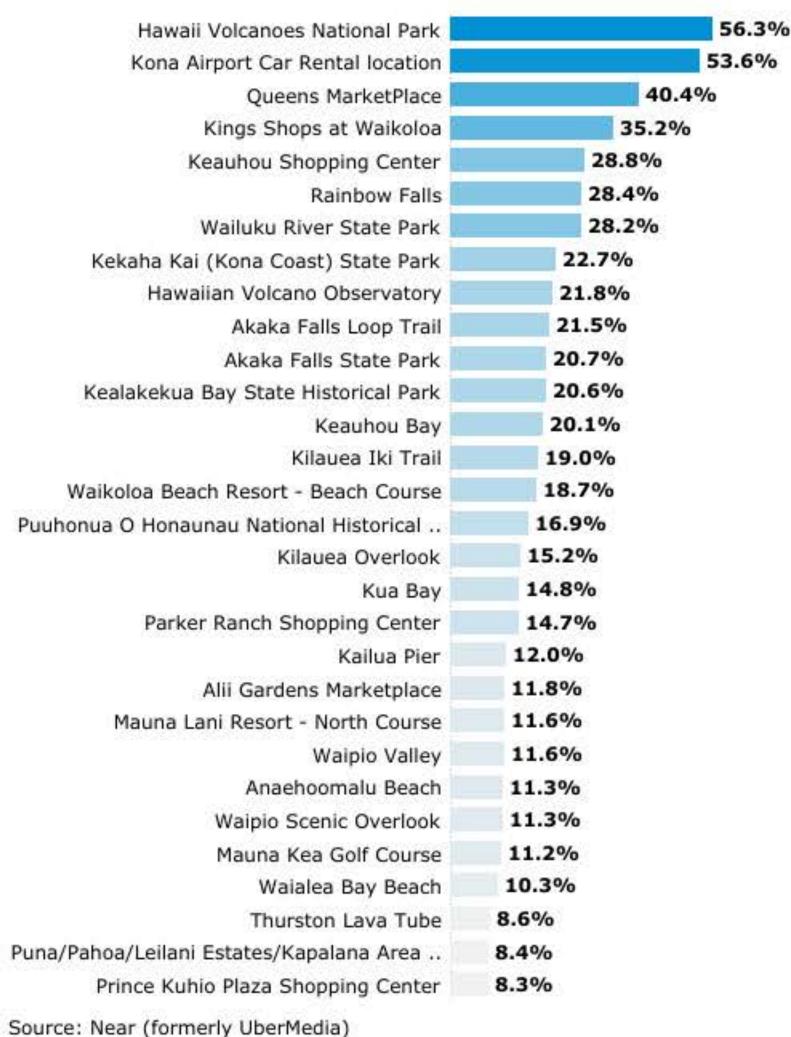
Date range: 01-Jul-21 to 31-Jul-21



Cross Visitation on Hawaii Island

% share of visitors to Hawaii Island going to Kailua-Kona Town that also visited other POIs

Date range: 01-Jul-21 to 31-Jul-21



Cross Visitation on Other Islands

% share of visitors to Hawaii Island who went to Kailua-Kona Town that also visited other islands

Date range: 01-Jul-21 to 31-Jul-21



Source: Near (formerly UberMedia)

Source: Near (formerly UberMedia)

Oahu Visitation Insights for Residents

Date Range: 01-Jul-21 to 31-Jul-21

Island

Oahu

County of Residence Honolulu, HI From Date 01-Jul-21

11.2%

8.9%

To Date 31-Jul-21

Visitors

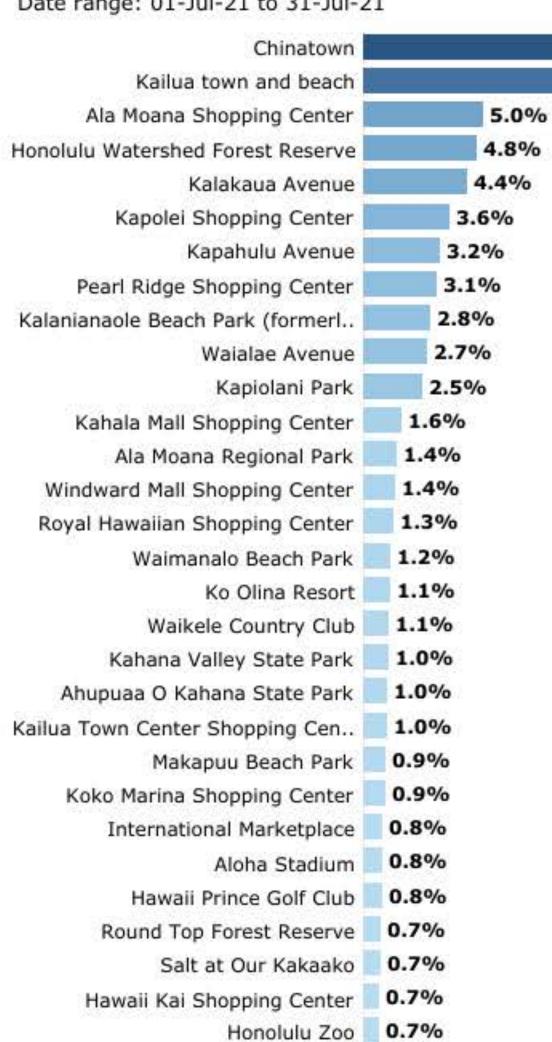
AUTHORITY



HAWAI'I TOURISM

Top-30 Points of Interest on Oahu

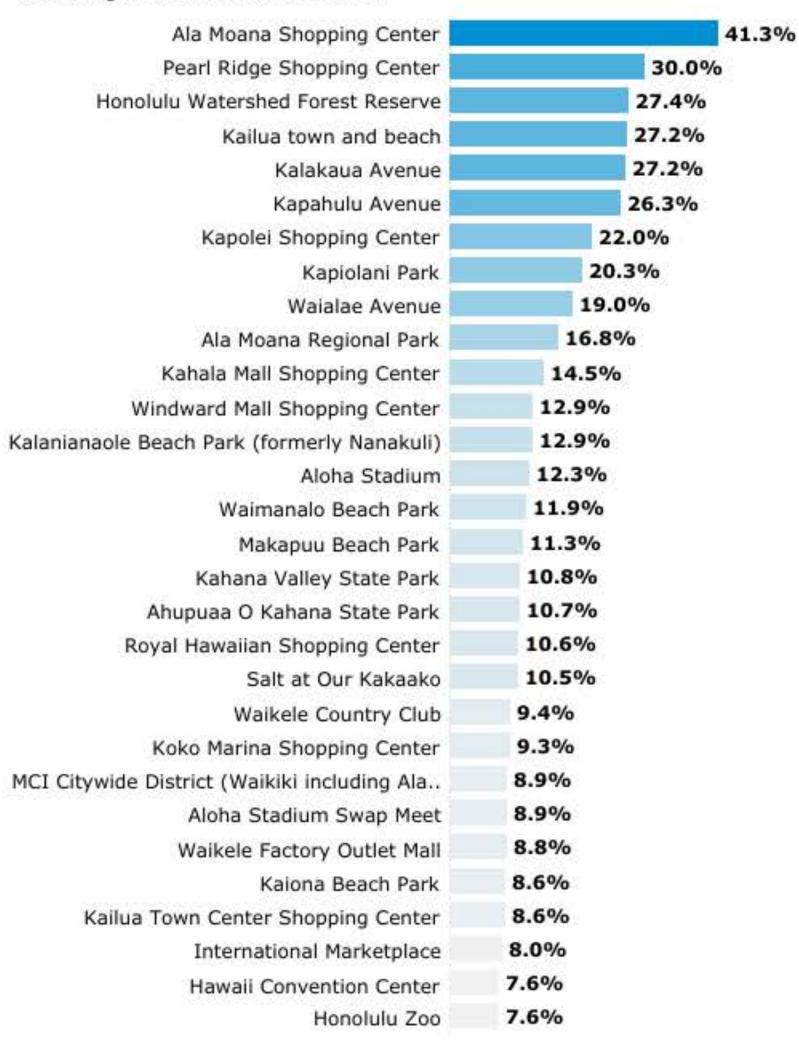
% share of visits by residents of Oahu Date range: 01-Jul-21 to 31-Jul-21



Cross Visitation on Oahu

Source: Near (formerly UberMedia)

% share of Oahu residents visiting Chinatown that also visited other POIs Date range: 01-Jul-21 to 31-Jul-21



Cross Visitation on Other Islands

% share of Oahu residents visiting Chinatown that also visited POIs on other islands Date range: 01-Jul-21 to 31-Jul-21

Upcountry Maui	Maui Island	17.5%
Kahului Airport Car Rental location	Maui Island	13.1%
Hawaii Volcanoes National Park	Hawaii Island	13.0%
Kailua-Kona Town	Hawaii Island	12.7%
Prince Kuhio Plaza Shopping Center	Hawaii Island	11.4%
Lahaina Bypass	Maui Island	10.7%
Lihue Airport Car Rental location	Kauai	10.0%
Maui Mall Shopping Center	Maui Island	9.9%
Hilo Helicopter Tours Heliport Area	Hawaii Island	9.6%
Queen Kaahumanu Center	Maui Island	8.9%
Kaahumanu Shopping Center	Maui Island	8.7%
Kukui Grove Shopping Center	Kauai	8.4%
Queens MarketPlace	Hawaii Island	8.1%
Puna/Pahoa/Leilani Estates/Kapalana	Hawaii Island	7.6%
Kona Airport Car Rental location	Hawaii Island	7.5%
Paia Town	Maui Island	7.5%
Hana/Road to Hana	Maui Island	7.4%
Wailua River State Park	Kauai	7.3%
Costco	Maui Island	7.0%
Front Street in Lahaina	Maui Island	6.7%
Wailuku River State Park	Hawaii Island	6.2%
Hilo Airport Car Rental location	Hawaii Island	6.2%
Kauai Lagoons Golf Course	Kauai	5.7%
Rainbow Falls	Hawaii Island	5.5%
Parker Ranch Shopping Center	Hawaii Island	5.3%
Big Island Candies	Hawaii Island	4.9%
Azeka Shopping Center	Maui Island	4.8%
H.A. Baldwin Beach Park	Maui Island	4.8%
Haleakala National Park	Maui Island	4.7%
Kaunakakai Town	Molokai	4.5%

Source: Near (formerly UberMedia)

October 1, 2021

Source: Near (formerly UberMedia)

SPECIAL RESEARCH REPORTS

https://www.hawaiitourismauthority.org/research/other-research/

Safe Travels – Transpacific Screened Passengers

Reason for Trip by Arrival Airport - Transpacific Screened Passengers

Sept 28	Honolulu (HNL)	Kahului (OGG)	Kona (KOA)	Hilo (ITO)	Līhu'e (LIH)	Grand Total
Airline Crew	635	267	126	4	98	1,130
Connecting Flight (Transit)	418	23	9	0	10	460
Corporate Meeting	21	5	12	0	4	42
Essential Worker	97	17	10	0	8	132
Honeymoon	59	67	19	1	22	168
Incentive Trip	8	6	22	0	2	38
Intended Resident	116	22	22	2	10	172
Military or Federal Government	160	4	0	0	0	164
Other	73	47	19	2	6	147
Other Business	118	61	33	3	11	226
Pleasure/Vacation	4,091	3,110	1,086	24	1,153	9,464
Returning Resident	3,056	593	359	65	146	4,219
Sports Event	49	0	2	0	0	51
To Attend School	11	1	31	0	0	43
To Get Married	10	25	2	0	8	45
Visiting Friends or Relatives	1,153	279	203	35	107	1,777
Grand Total	10,075	4,527	1,955	136	1,585	18,278

https://www.hawaiitourismauthority.org/covid-19-updates/trans-pacific-passenger-arrivals/





TRAVEL AGENCY BOOKING TRENDS

SEPTEMBER 27, 2021





Global Agency Pro

- HTA subscribes to Global Agency Pro, an online travel distribution system consisting of Travel Agency data.
- Global Agency Pro provides access to over 90% of the world's Travel Agency airline transactions.
- The database consists of five years of historical ticketing data and one year of advance purchase data.
- The information is updated daily with a recency of two days prior to current date.



Global Agency Pro Index

Bookings

 Net sum of the number of visitors (i.e., excluding Hawai'i residents and inter-island travelers) from Sales transactions counted, including Exchanges and Refunds.

Booking Pickup

Net difference in month-over-month (or quarter-over-quarter) bookings.

Booking Date

The date on which the ticket was purchased by the passenger. Also known as the Sales Date.

Travel Date

The date on which travel is expected to take place.

Point of Origin Country

The country which contains the airport at which the ticket started.

Travel Agency

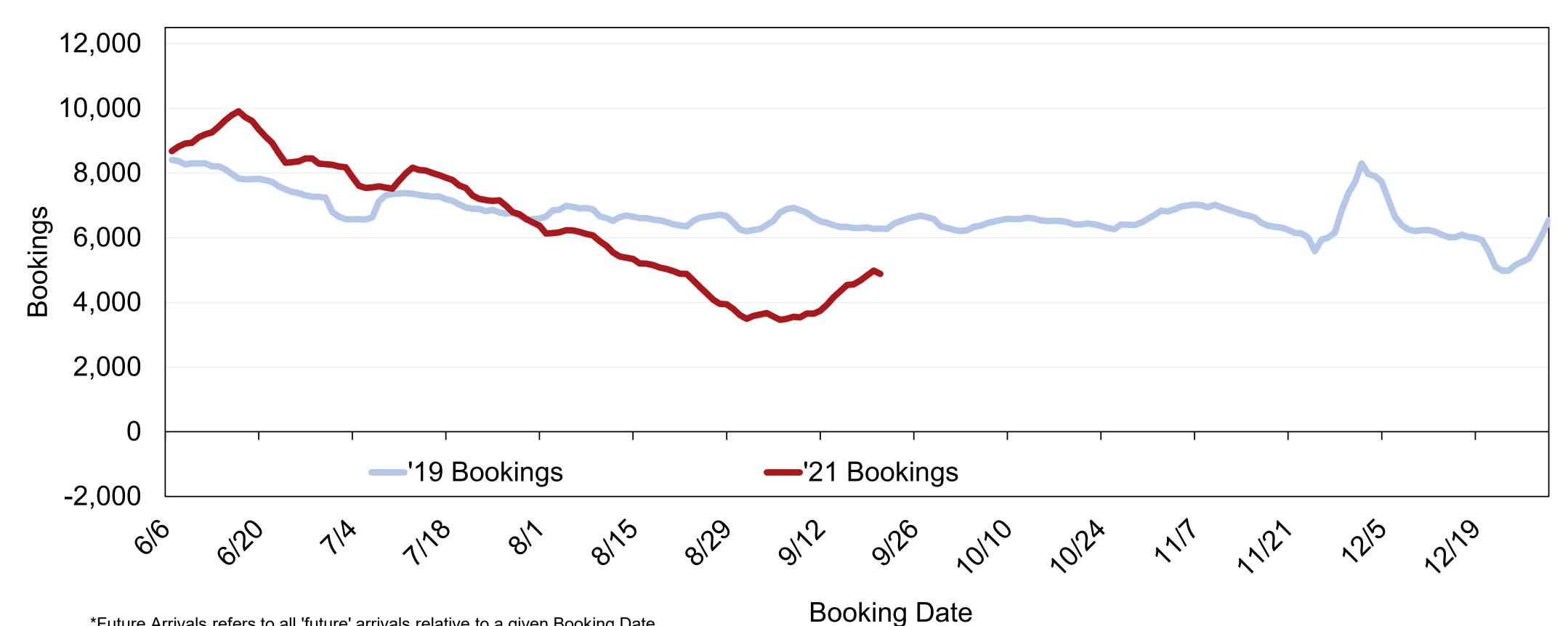
- Travel Agency associated with the ticket is doing business (DBA).





Travel Agency Bookings to Hawaii for Future Arrivals

Travel Agency Bookings to Hawaii for Future Arrivals* Based on a 7-day Moving Average as of September 25, 2021 U.S.



*Future Arrivals refers to all 'future' arrivals relative to a given Booking Date.

Update: Sep 25, 2021

Source: Global Agency Pro

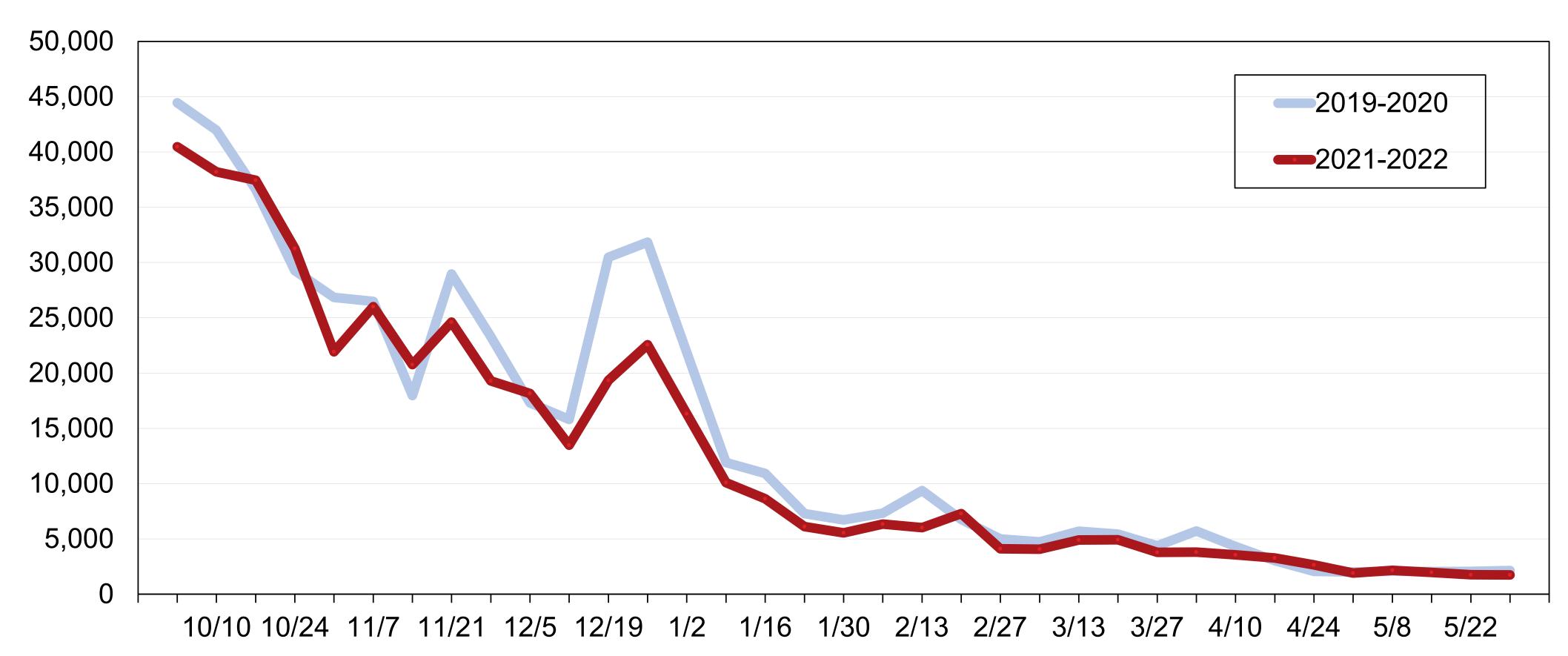




Travel Agency Bookings to Hawai'i for Future Arrivals

Travel Agency Weekly Bookings for Future Travel to Hawai'i as of September 25, 2021

U.S.



Source: Global Agency Pro, as of September 25, 2021

Source: Global Agency Pro

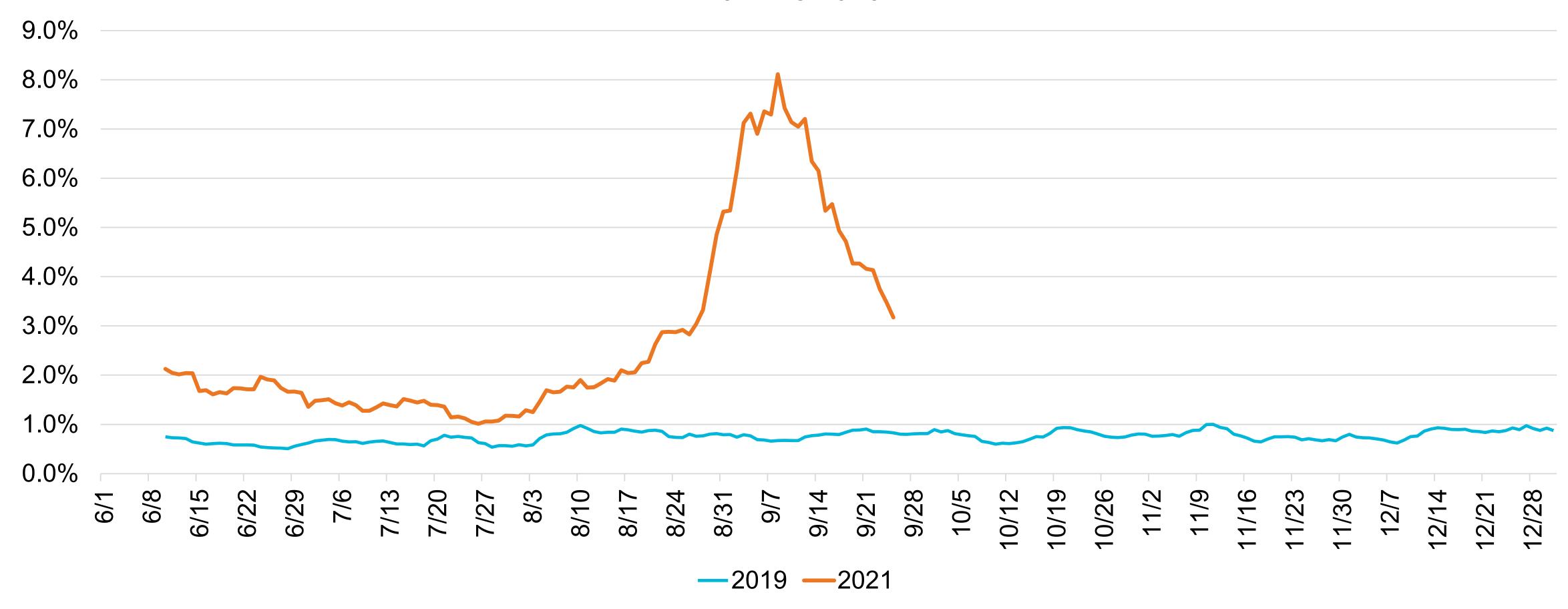




Travel Agency Bookings to Hawai'i for Future Arrivals

Travel Agency Cancellations/Rebookings as a Percentage of Total Ticket Transactions for Future Arrivals to Hawaii (7-Day Moving Average)

2021 vs 2019



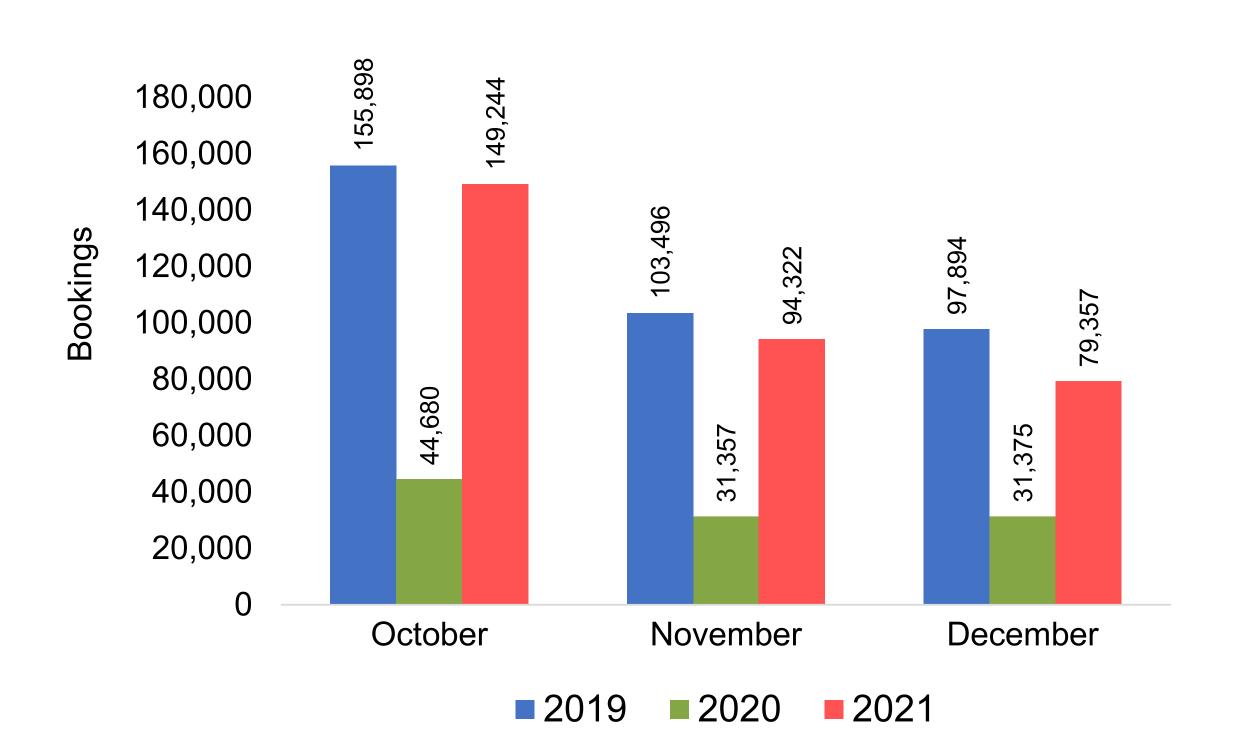
Source: Global Agency Pro



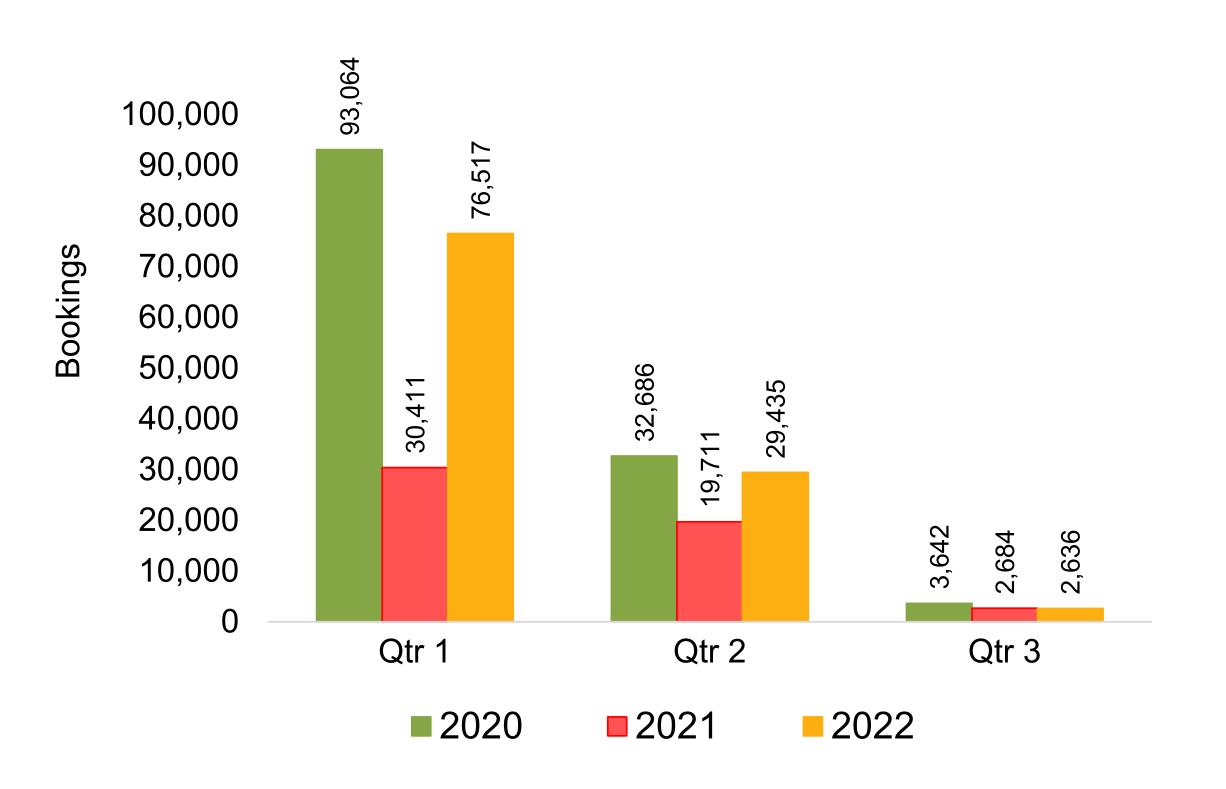


US

Travel Agency Booking Pace for Future Arrivals, by Month



Travel Agency Booking Pace for Future Arrivals, by Quarter







O'ahu by Month 2021

October

2019

Travel Agency Booking Pace for Future Arrivals U.S. 68,560 80,000 70,000 41,328 41,027 60,000 34,864 50,000 19,627 40,000 12,808 2,065 30,000 20,000 10,000

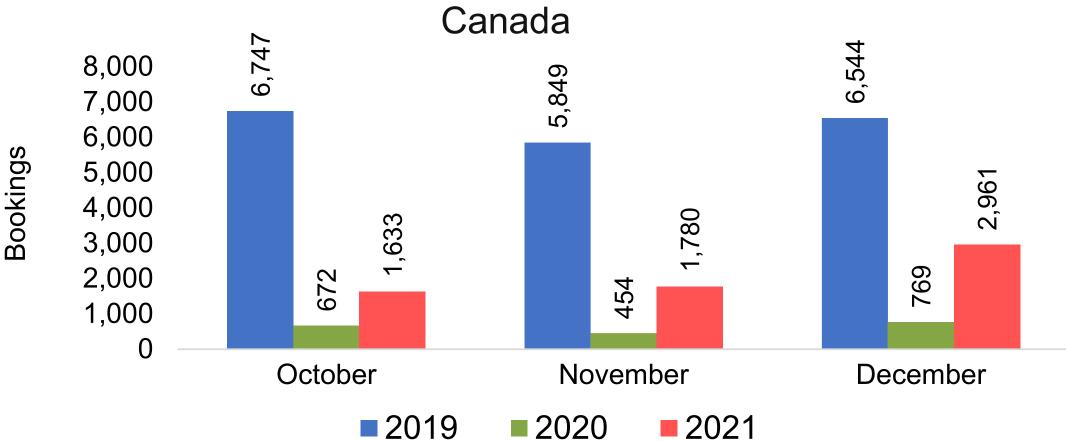
November

2021

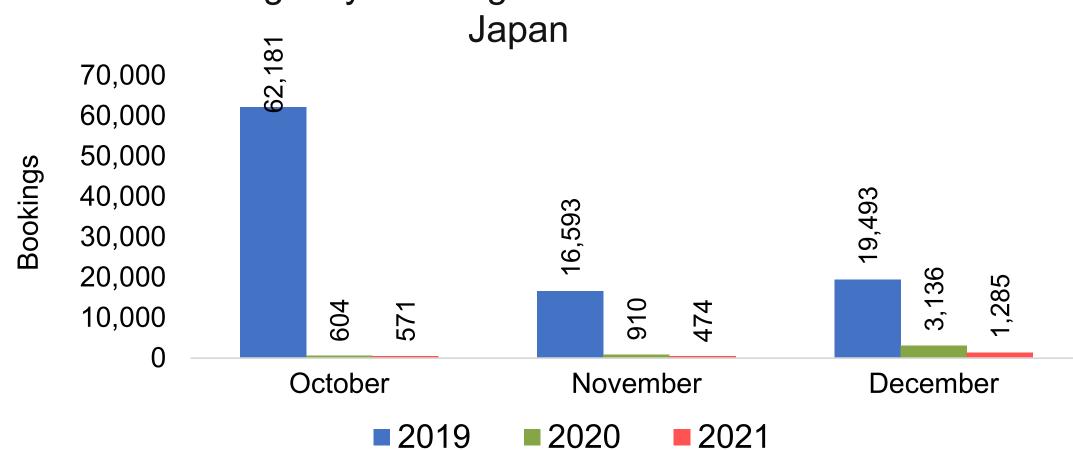
December



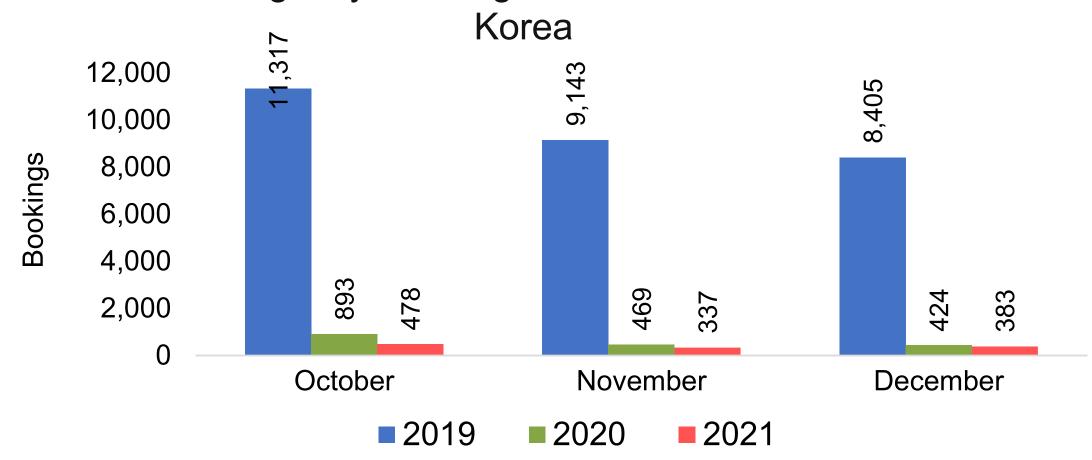
2020



Travel Agency Booking Pace for Future Arrivals



Travel Agency Booking Pace for Future Arrivals









YouGov Destination Index Trends

September 27, 2021





YouGov Syndicated Survey

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





Destination Index

Metrics

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

Indexing

 U.S. and Japan data are indexed to January 1, 2020, as a pre-COVID-19 baseline to compare magnitude in shifts across markets. Canada data began on September 18, 2020, well into the pandemic, and thus cannot be indexed to a pre-pandemic date.





2020 Significant Dates

March 26, 2020

- mandated 14day quarantine
for all travelers
coming to
Hawai'i goes
into effect at
12:01 a.m.

June 24, 2020 –
Gov. Ige
announces pretravel testing
program to
avoid the
mandatory
quarantine
starting Aug. 1st

September 6-26, 2020– Hurricane Douglas passes

August 6, 2020
 announcement that interisland travel quarantine will be reinstated starting Aug.
 11th

September 16, 2020 – pretravel testing program launch pushed to Oct. 15th November 24, 2020 – Kaua'i County announces they will opt out of Safe Travels program starting Dec. 2nd

0

close to the

Hawaiian

Islands

0

0

0



September 16, 2020 – 14-day quarantine requirement for interisland travelers lifted July 13, 2020 – pre-travel testing program launch pushed back to Sept. 1st

July 27, 2020 –
Gov. Ige
announces
Hawai'i is being
considered by
Japan for
resumption of
international
travel

September 68, 2020 – pretravel testing program launch pushed back to Oct. 1st, at the earliest October 15, 2020 – pretravel testing program officially begins





2021 Significant Dates

January 12, 2021 – CDC recommends all international arrivals over the age of two get tested within three days before returning to the U.S.

January 26, 2021 – new CDC regulation goes into effect. All international arrivals (2+ years of age) to the U.S. must have a negative COVID-19 test within three days of departure to avoid a 10-day quarantine

June 4, 2021 – Gov.
Ige announces that starting June 15, all restrictions for intercounty travel will be lifted and travelers entering the state who have been vaccinated in Hawai'i may bypass quarantine without a pre-travel test.

August 23, 2021 – Gov. Ige announces "Now's not a good time to visit Hawai'i."







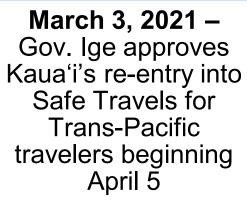








January 20, 2021 –
all arriving
passengers to Maui
County must upload
the AlohaSafe
COVID-19 exposure
app to their cell
phones



June 24, 2021 – Gov.
Ige announces that individuals vaccinated in the U.S. will be able to bypass the testing/quarantine requirement with proof of vaccination through the state's Safe Travels program



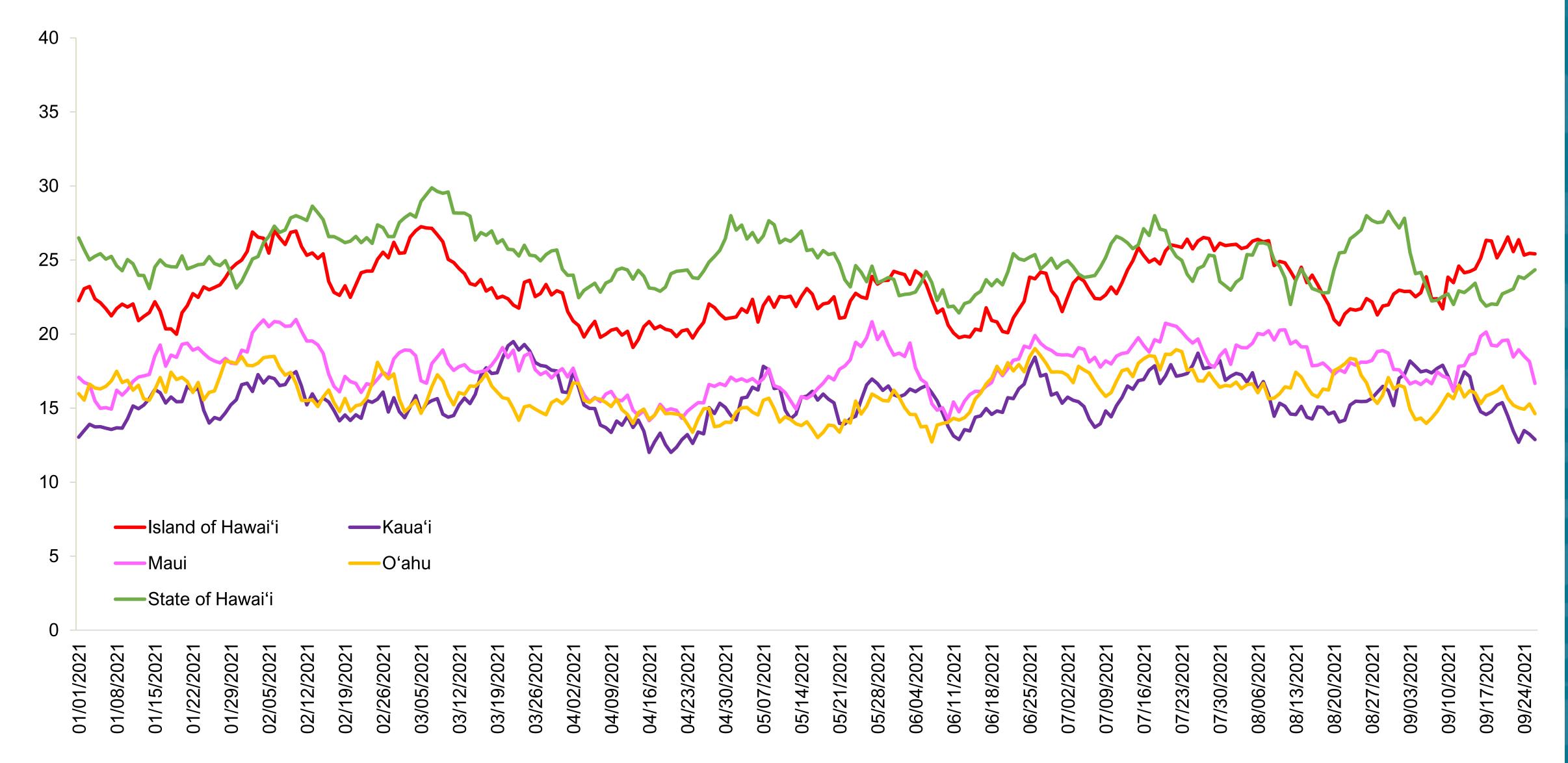


U.S. Destination Index Trends



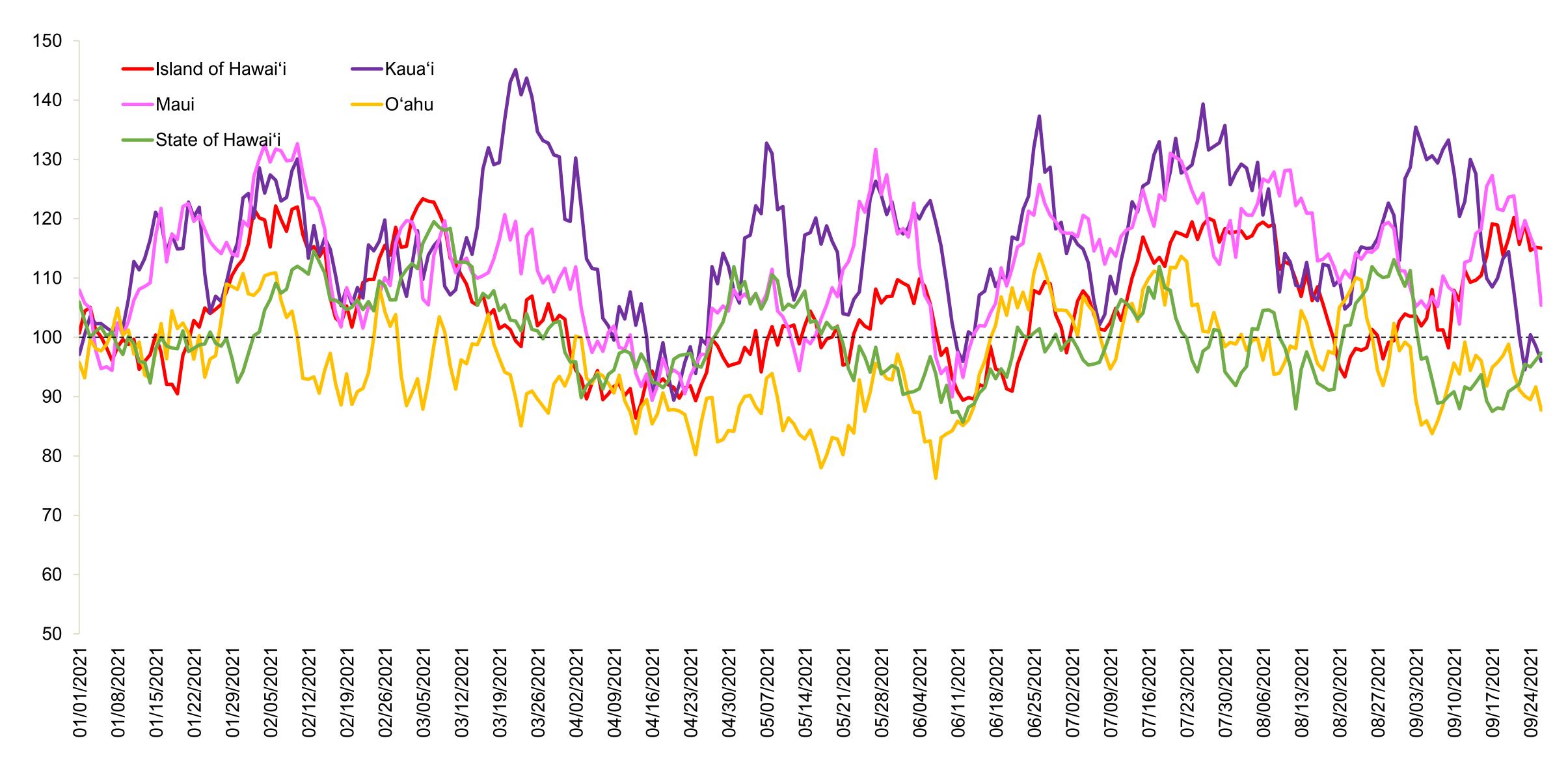


U.S. Consideration (% Yes) Two-Week Moving Average



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

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



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

YouGov Destination Index Trends Responsible Travelers Segment

September 27, 2021



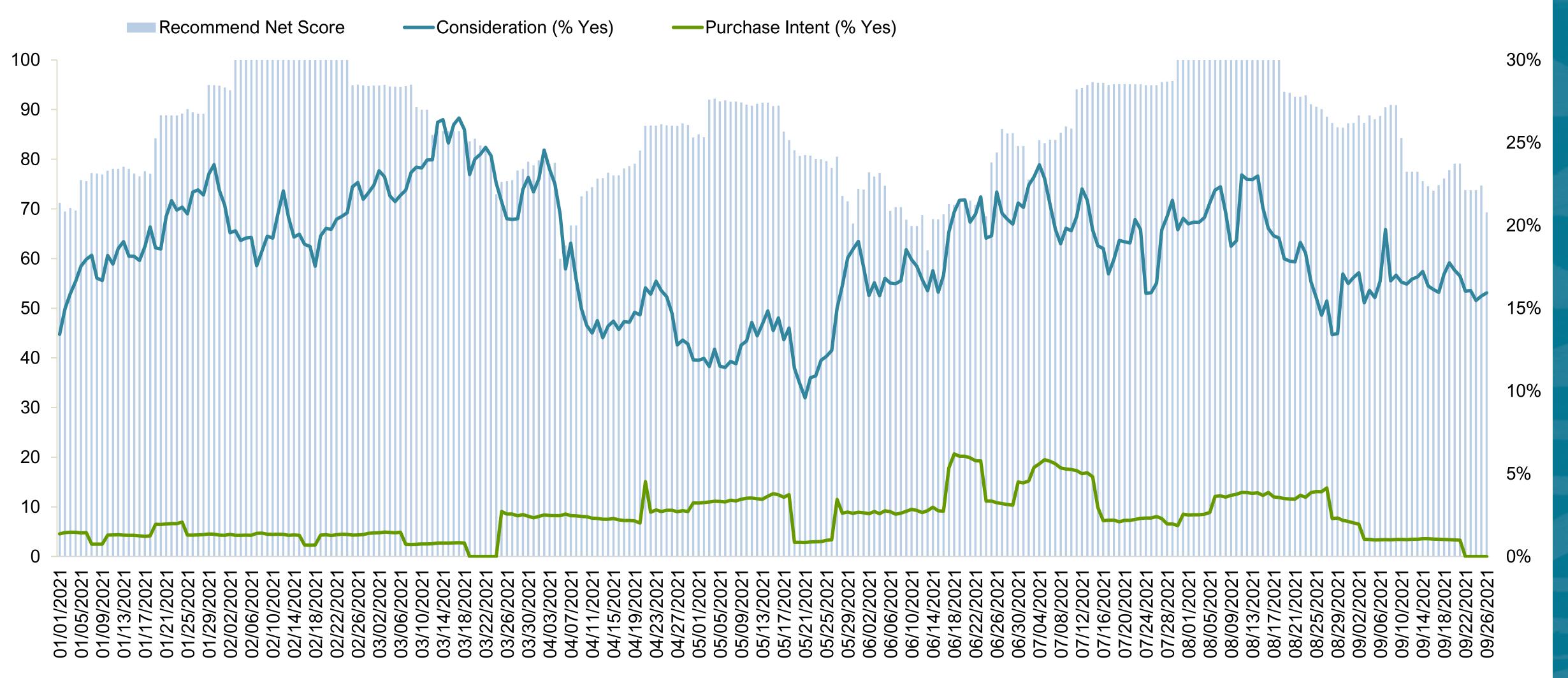


U.S. Destination Index Trends Responsible Travelers Segment O'ahu





O'ahu – Recommend Net Score, Consideration (% Yes), Purchase Intent (% Yes) U.S. Four-Week Moving Average



Recommend Question: (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID? **Consideration Question**: (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider? **Purchase Intent Question**: (Net) Of the destinations considered, which are you most likely to visit?

COVID-19 Impact on U.S. Avid Travelers

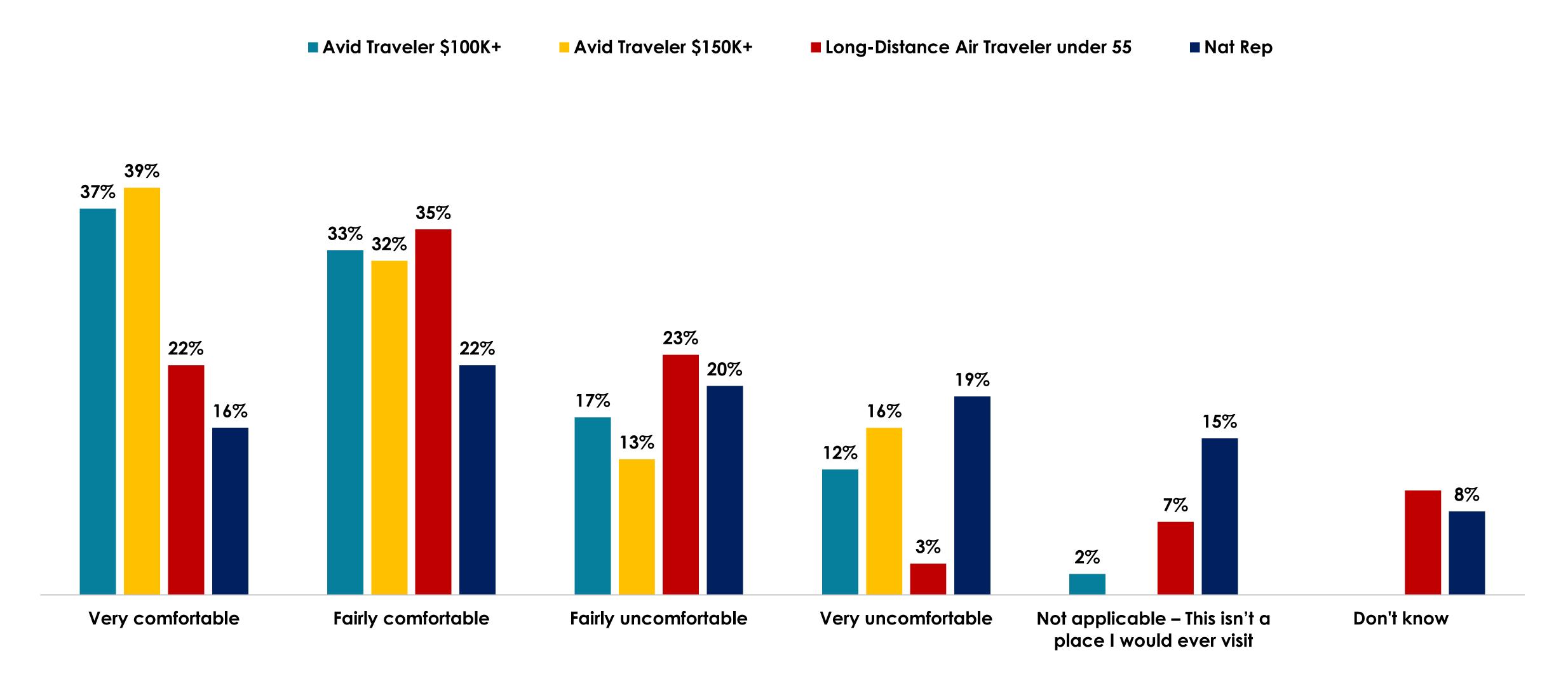
An HVCB analysis of YouGov data provided by HTA as of September 12, 2021





Travelers' Pandemic Outlook

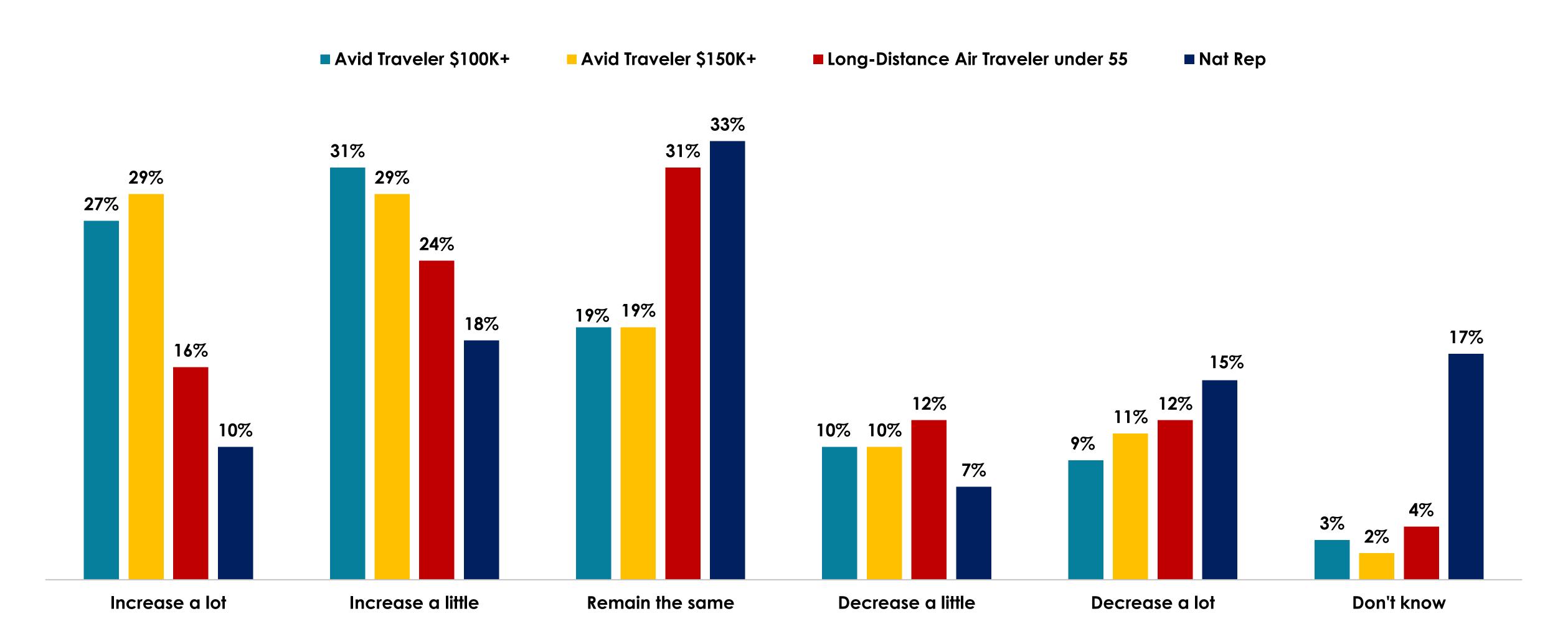
Level of comfort visiting an airport right now





Future Travel Plans

Future Travel – Expected change to air travel in the next 12 months



YouGov Global Travel Profiles

TRAVEL & TOURISM INSIGHTS



What the world thinks about travel





Panel Size by Market



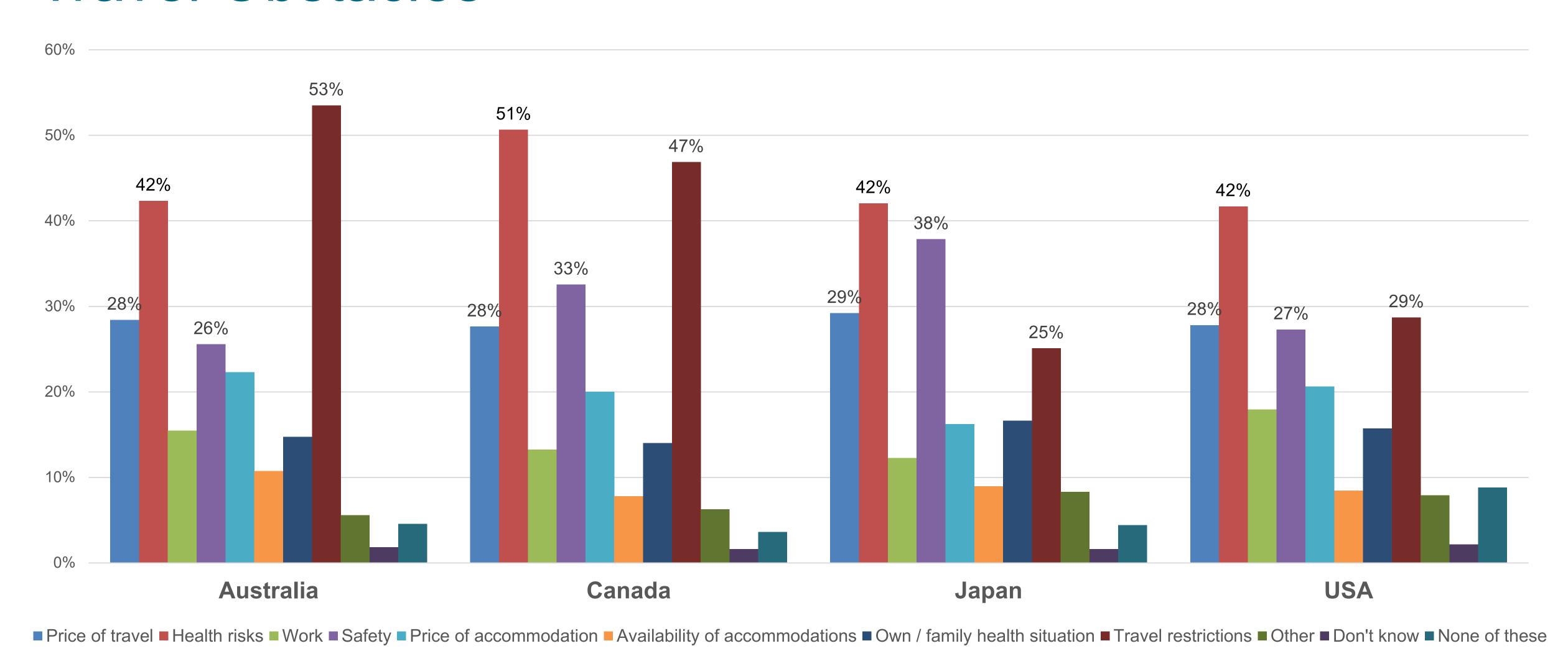
Country	Panel Size
United States	4,989,632
Japan	2,200,000
United Kingdom	2,502,438
Canada	377,453
Brazil	403,323
Germany	776,778
Indonesia	701,981
France	711,796
Egypt	387,267
China	359,422
Thailand	460,742
India	604,026

Country	Panel Size
Denmark	234,455
Sweden	241,619
Philippines	339,047
Malaysia	286,239
Saudi Arabia	238,117
Australia	308,499
United Arab Emirates	148,615
Norway	163,394
Singapore	119,602
Mexico	257,403
Finland	94,802
Spain	285,904
Italy	209,939





Travel Obstacles

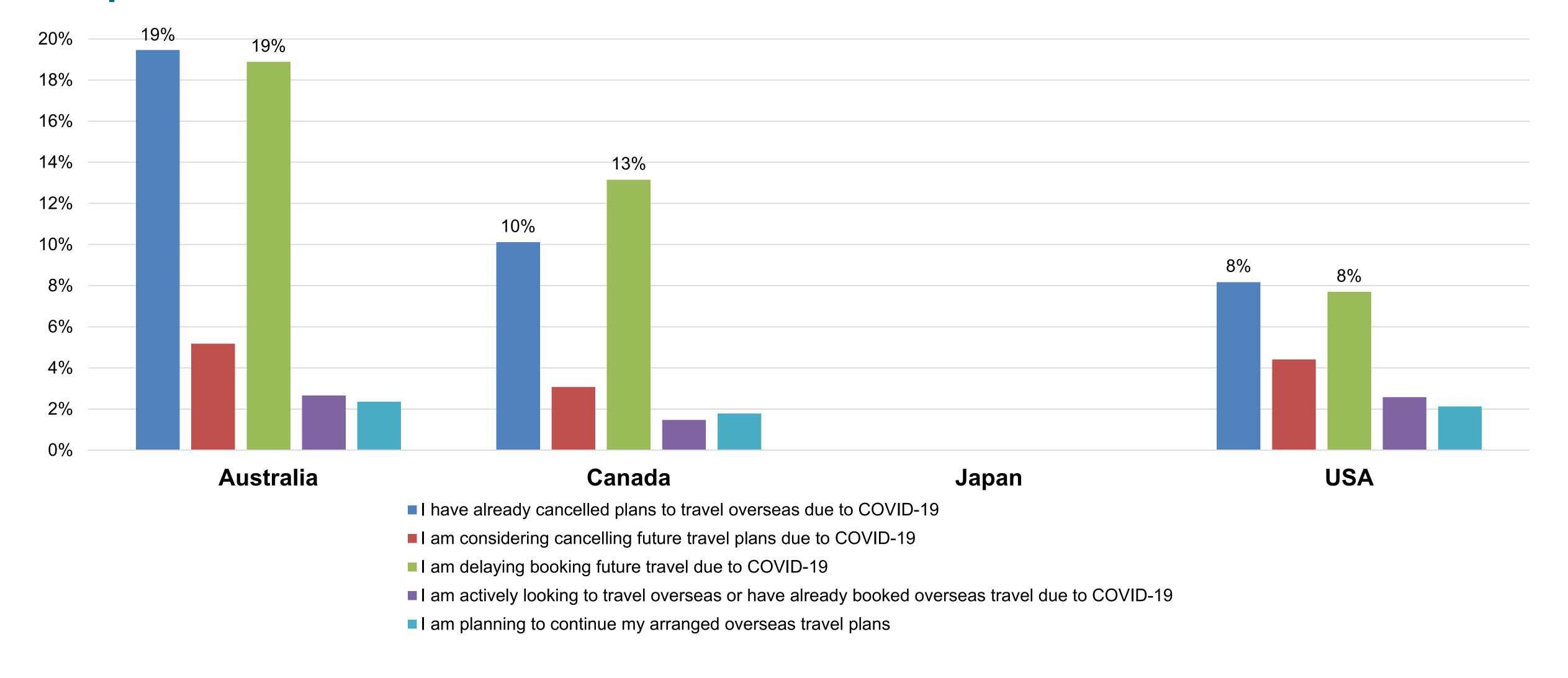


Source: YouGov Global Travel Profiles as of 9/29





Impact of COVID-19 on Overseas Travel Plans



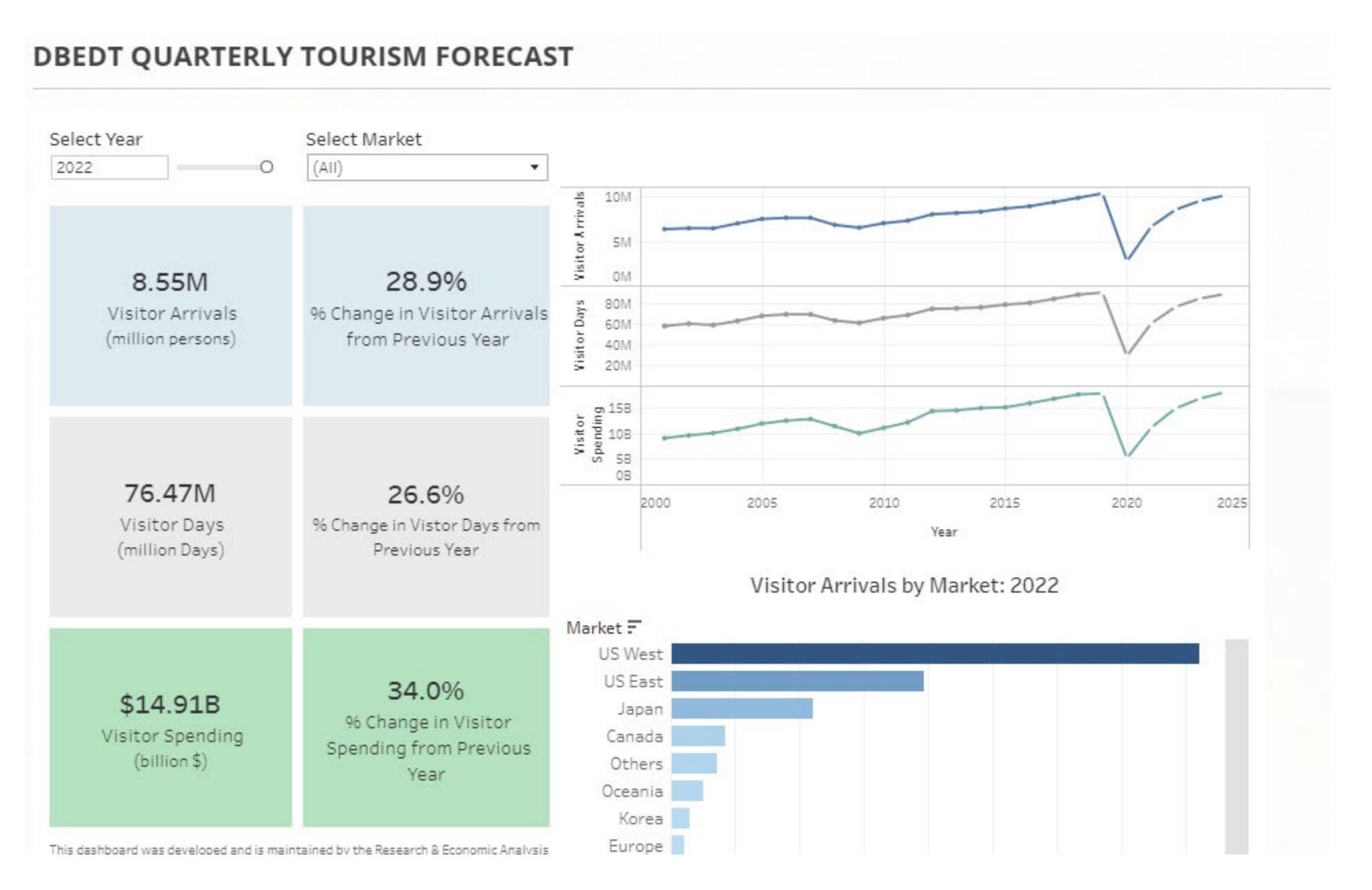
Source: YouGov Global Travel Profiles as of 9/29





DBEDT TOOLS & RESOURCES

DBEDT Tourism Forecast



http://dbedt.hawaii.gov/visitor/tourism-forecast/





DBEDT Daily Pax Dashboard

Daily Passenger Counts

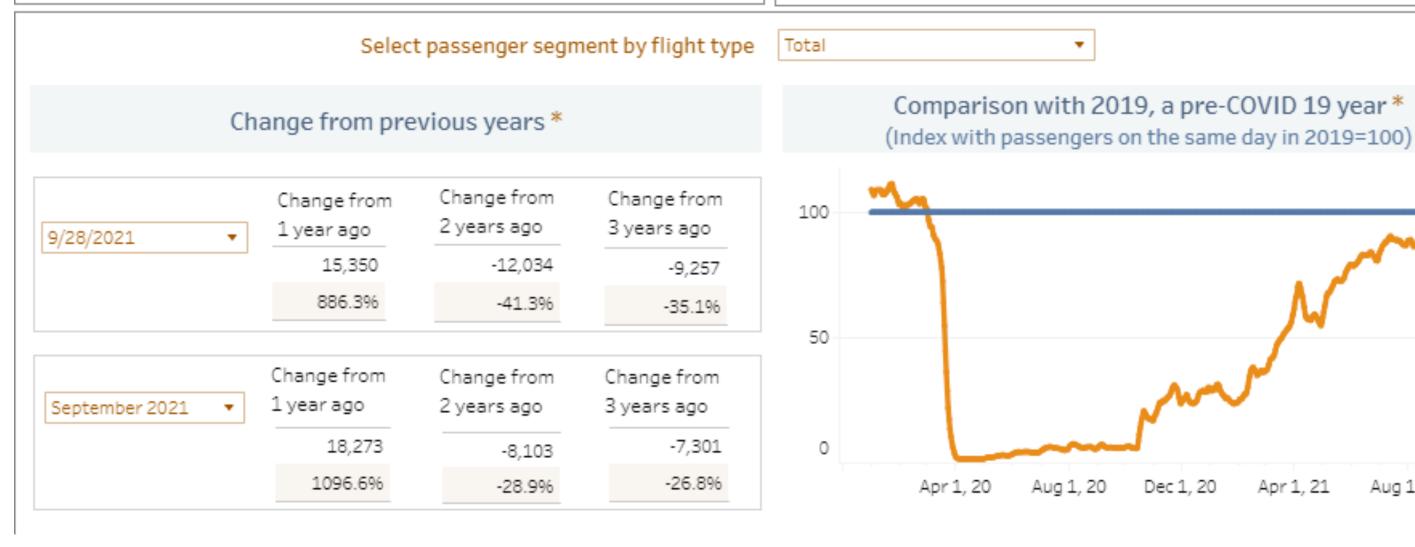


Data 🖨

- Daily passenger counts are estimates by DBEDT Research Division based on daily information from Dep. of Agriculture and Dep. of Transportation.
- Estimates are preliminary and subject to change when more information becomes available later.
- Passenger counts include returning residents, intended residents as well as visitors.
- Passengers via inter-island flights and flights from Canada were not included in the counts.
- When desired, dates for the past years were adjusted to the closest comparable weekday of current year (in tables and charts with *)

September 28 (Tue)*										
		On domestic flights to						On int'l flights from		
	Total	State	Oahu	Maui	Big isl	Kauai	All	Japan	Others	
2021	17,082	16,437	9,058	4,351	1,773	1,255	645	124	521	
2020	1,732	1,549	1,341	140	68	0	183	88	95	
2019	29,116	21,639	12,198	5,731	2,072	1,638	7,477	4,969	2,508	
2018	26,339	19,730	11,194	5,010	1,911	1,615	6,609	4,076	2,533	

September (daily avg.) *									
	On domestic flights to						On int'l flights from		
	Total	State	Oahu	Maui	Big isl	Kauai	AII	Japan	Others
2021	19,939	19,508	10,391	5,065	2,175	1,878	431	86	344
2020	1,666	1,528	1,238	134	122	34	138	7	131
2019	28,042	20,162	11,206	5,299	1,885	1,772	7,880	5,276	2,604
2018	27,240	19,576	10,871	4,979	1,831	1,896	7,664	4,828	2,836

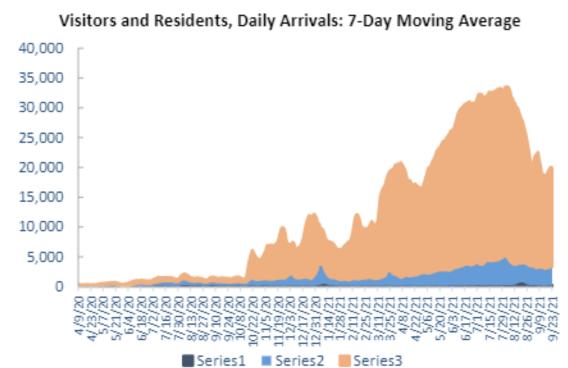


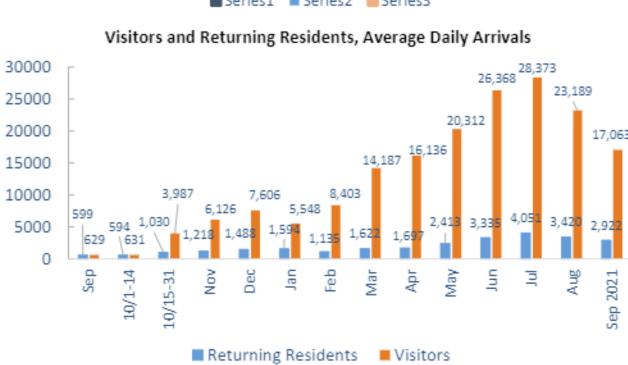
DBEDT



DBEDT COVID-19 & Hawaii's Economy

Travel to Hawaii: Visitors and Residents





Visitors and Residents, Daily Arrivals 7-Day Average as of September 23

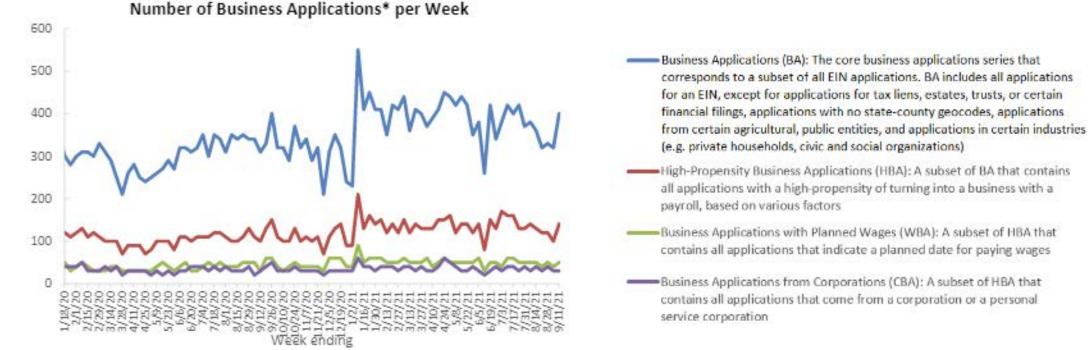
State/ County	Returning Residents	Intended Residents	Visitors
State	3,109	215	16,462
Honolulu	2,262	159	7,670
Hawaii	276	27	1,933
Maui	419	20	4,983
Kauai	123	7	1,843
Hilo	28	3	32

Visitors and Residents, Average Daily Arrivals as of September 23

State/ County	Returning Residents	Visitors
State*	2,922	17,063
Honolulu	2,124	8,146
Hawaii	253	1,944
Maui	393	5,052
Kauai	120	1,877
Hilo	33	44

Source: Hawaii Tourism Authority, Hawai'i Passenger Arrivals By Air

Effects on Businesses



(e.g. private households, civic and social organizations) ·High-Propensity Business Applications (HBA): A subset of BA that contains all applications with a high-propensity of turning into a business with a payroll, based on various factors

Business Applications with Planned Wages (WBA): A subset of HBA that contains all applications that indicate a planned date for paying wages

 Business Applications from Corporations (CBA): A subset of HBA that contains all applications that come from a corporation or a personal service corporation

Change in Workplace Visits

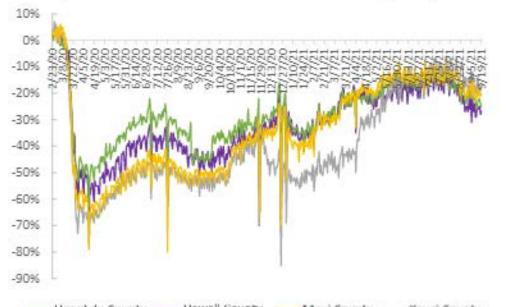
Source: Census Bureau, Business Formation Statistics

(Relative to median value from Jan 3- Feb 6, 2020)

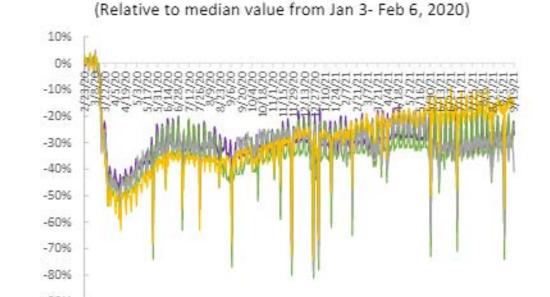
*Business applications can include government, business, non-profit

organizations, and proprietors

Change in Retail and Recreation Visits



esearch economic



Source: Google, COVID-19 Mobility Report



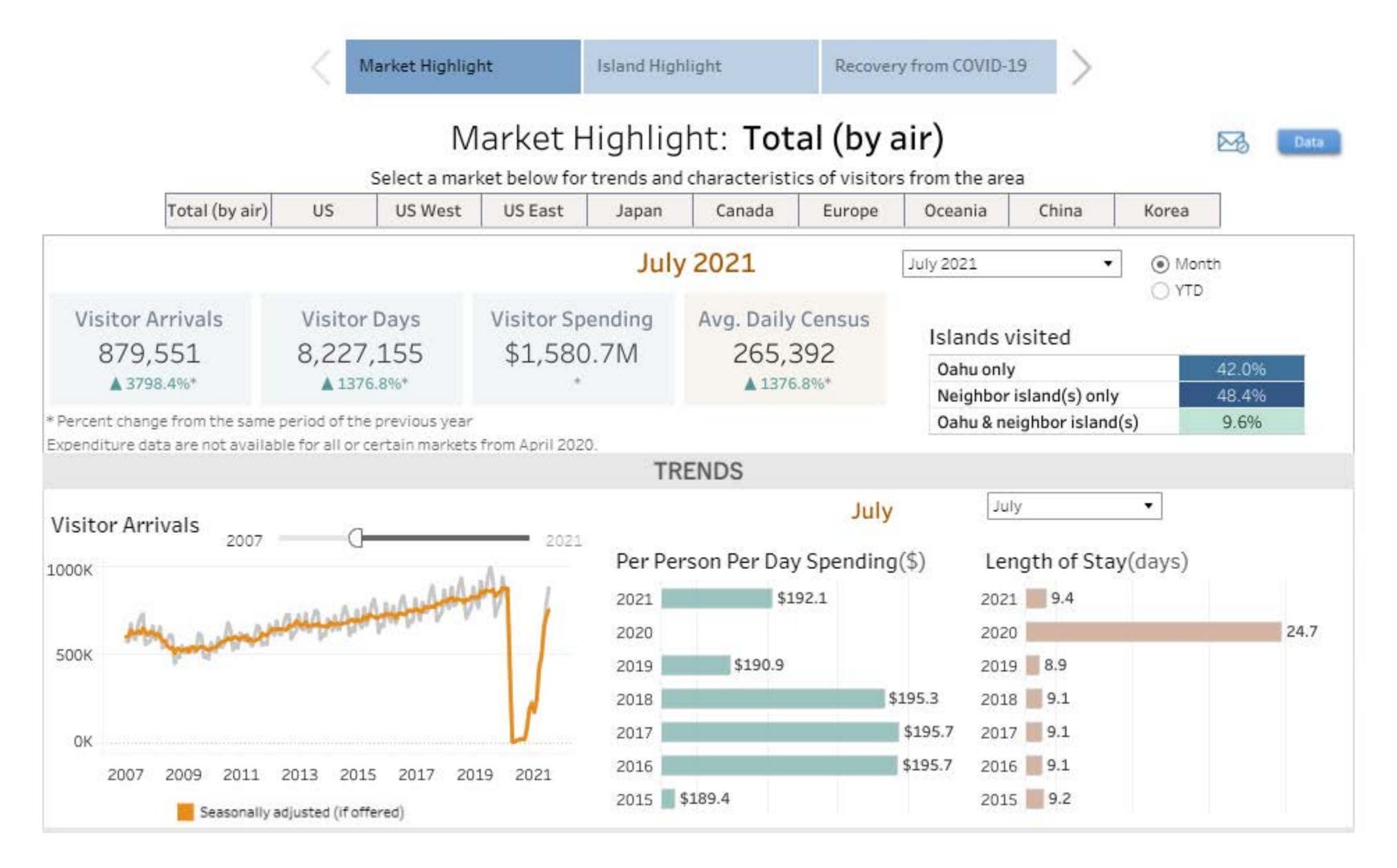




conomic

analysis

DBEDT Tourism Dashboard



http://dbedt.hawaii.gov/visitor/tourism-dashboard/



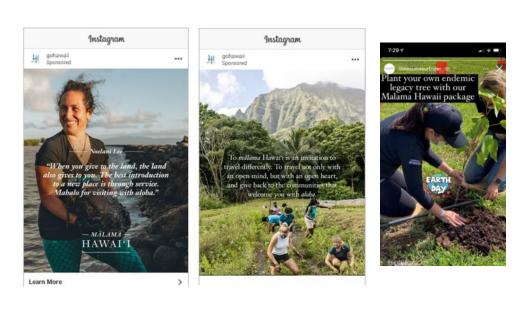


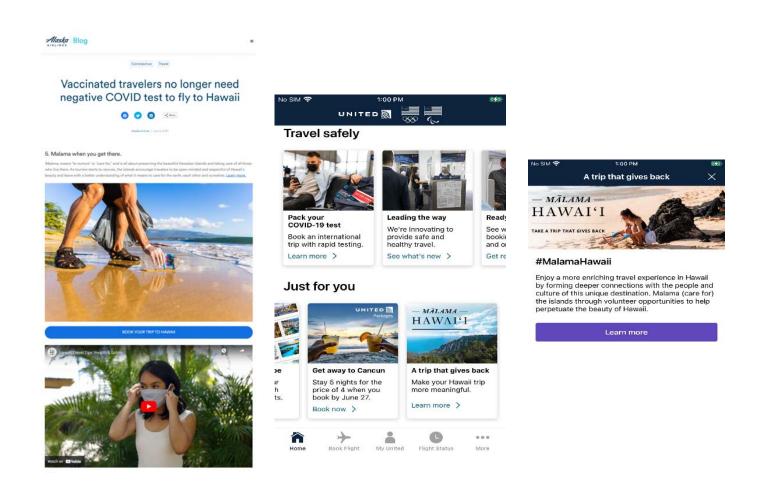


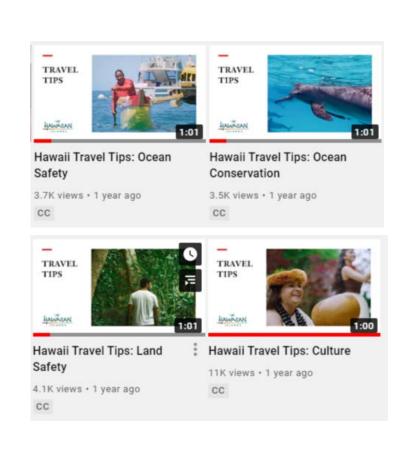
DEFINITION OF MARKETING



COMMUNICATIONS PROGRAMS







Mālama Hawai'i Kuleana / Safety Tips

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 & KULEANA MEDIA

Pre-Destination

- Advanced TV: May June, August –
 October 2021 Roku, Amazon, Hulu
- Custom Content: August October
 2021 Conde Nast Traveler, Matador
- Distribution: May June, August –
 October 2021 Complex, BuzzFeed,
 Tremor, AdTheorent, OMDp, Ogury

- •Search: March October 2021 Google
- •Social: May November 2021 Facebook, Instagram, YouTube, Pinterest

On Island

•Social: January – April, June – December 2021 – *Facebook, Instagram*



COMM. TOUCH POINTS | PRE-DESTINATION DECISION | VIDEO CREATIVE



Aquaculture Noelani Lee



Reforestation
Sam 'Ohu Gon III



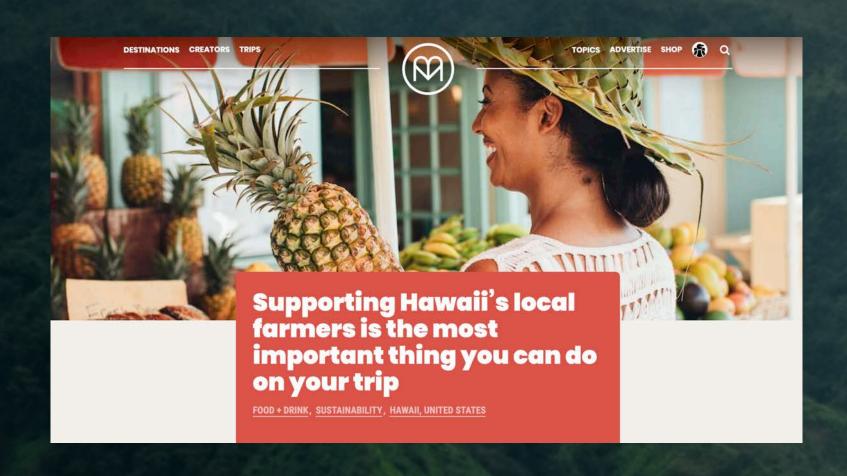
Habitat
Stewardship
Kia'i Collier



Sustainable Farming Rick Barboza



COMM. TOUCH POINTS | PRE-DESTINATION DECISION | DIGITAL MEDIA







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(M)

MATADOR

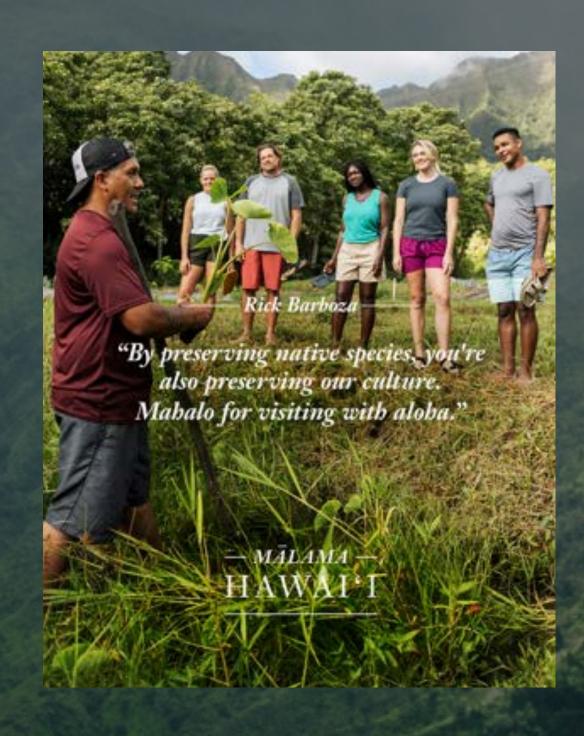
network



COMM. TOUCH POINTS | PRE-DESTINATION DECISION | SOCIAL MEDIA











HAWAII TOURISM

AUTHORITY

COMM. TOUCH POINTS | PRE-DESTINATION DECISION | EARNED MEDIA













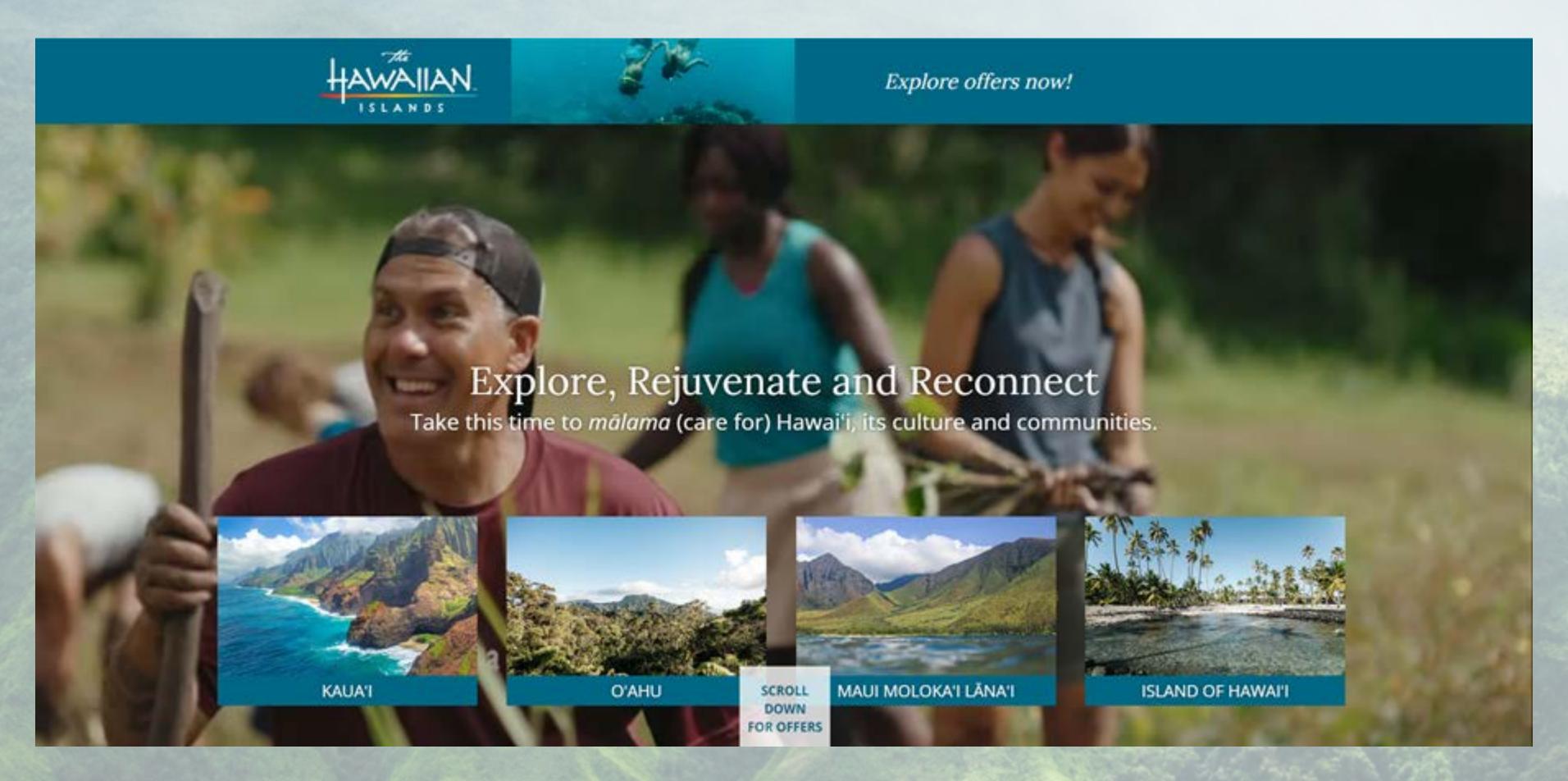




HAWAII TOURISM

AUTHORITY

COMM. TOUCH POINTS | PRE-DESTINATION DECISION | CO-OP PROGRAM





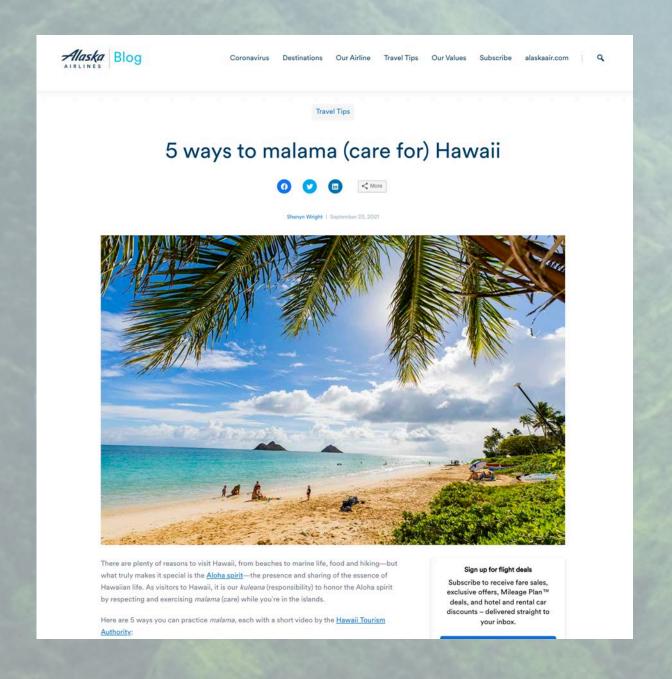
COMMUNICATION TOUCH POINTS | BOOKING / EN ROUTE / ARRIVAL

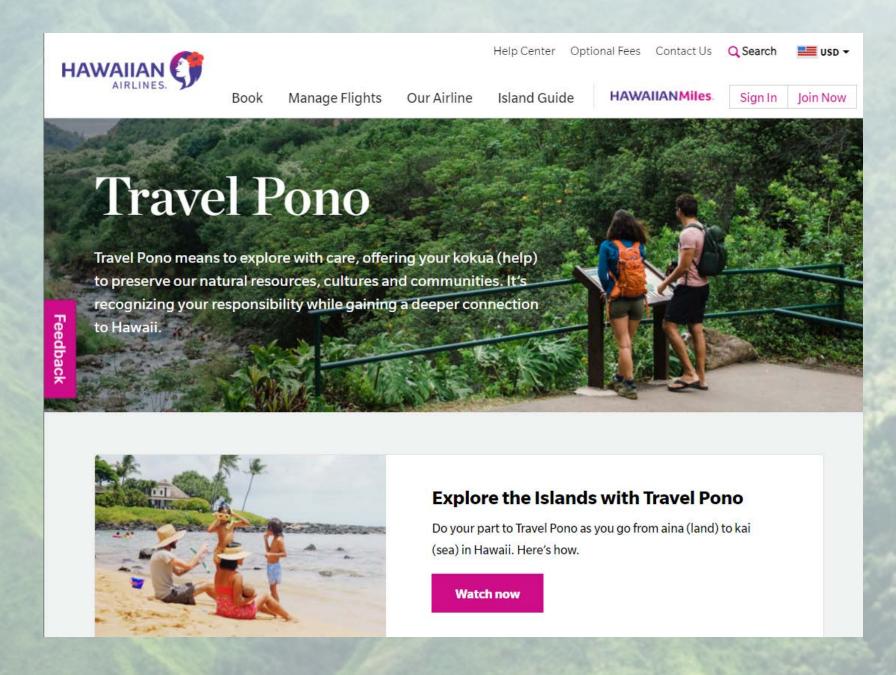


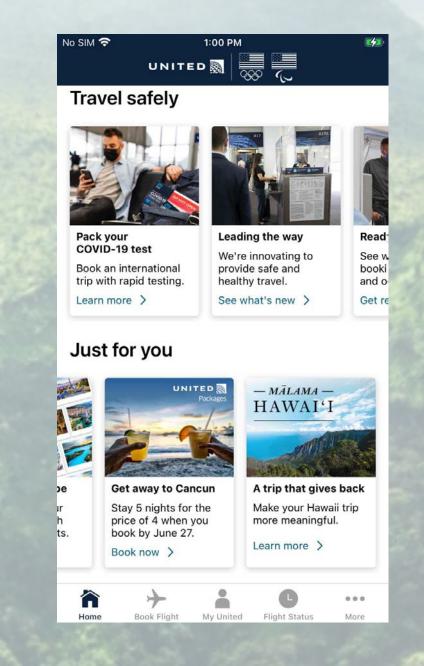








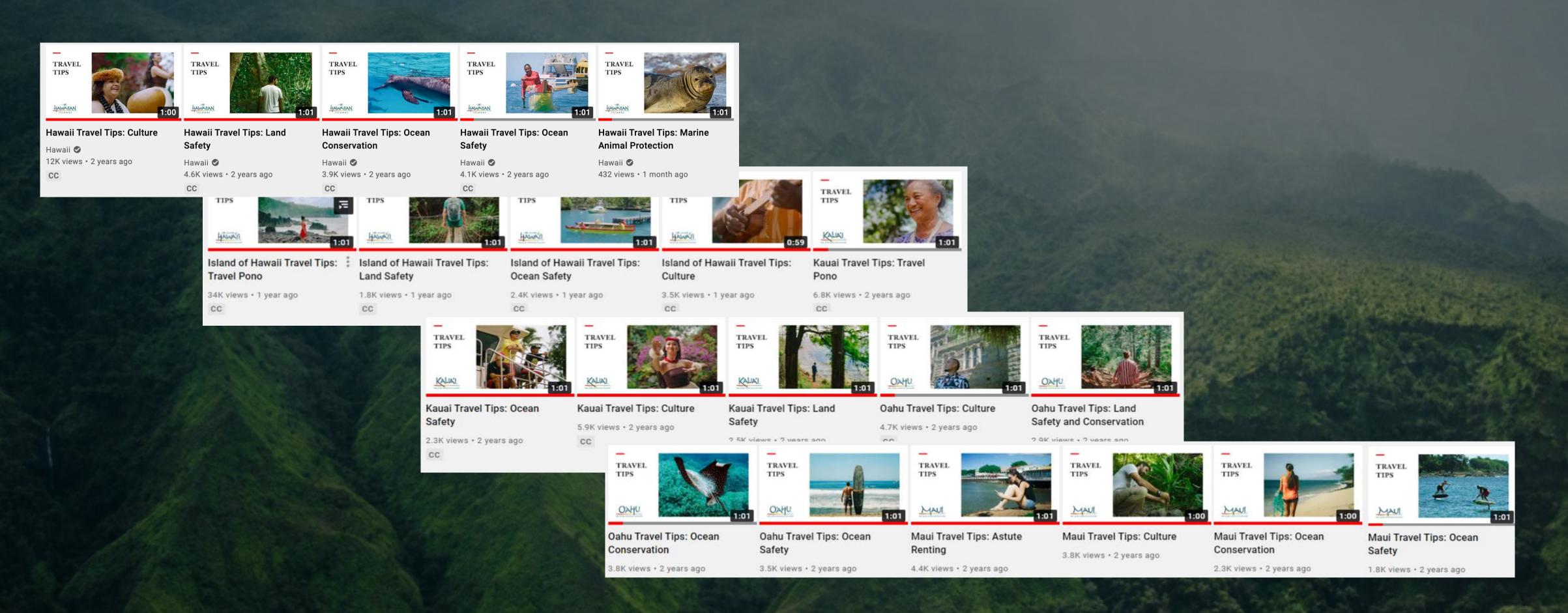






KULEANA

COMMUNICATION TOUCH POINTS | ON-ISLAND





COMMUNICATING COVID SAFETY REQUIREMENTS

Vaccination Exception Outreach

- 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







COMMUNICATING COVID SAFETY REQUIREMENTS

Safe Travels Program Support

HVCB has kept the gohawaii.com COVID-19 alert page up-to-date and contributed regular updates to DOH's hawaiicovid19.com/travel site.

GoHawaii call center and HVCB staff have answered questions about Safe Travels pretravel testing and the new vaccination exception.

Since October 15, 2020, the team has handled:

- 225,000+ calls
- 105,000+ emails





BRAND MANAGEMENT UPDATES

RFP Updates

- Kūkulu Ola
- Aloha 'Āina
- Community Enrichment
- USA
- Global MCI
- Support Services

•2021 Partner Opportunities

 hawaiitourismauthority.org/whatwe-do/partnership-opportunities

•2022 Markets

- USA
- Japan
- Canada
- Korea
- Oceania
- China
- •2022 Brand Marketing and Management Plans will be presented at the Winter Tourism Update



malama KU'UHOME

Caring for My Beloved Home





Google^[X]



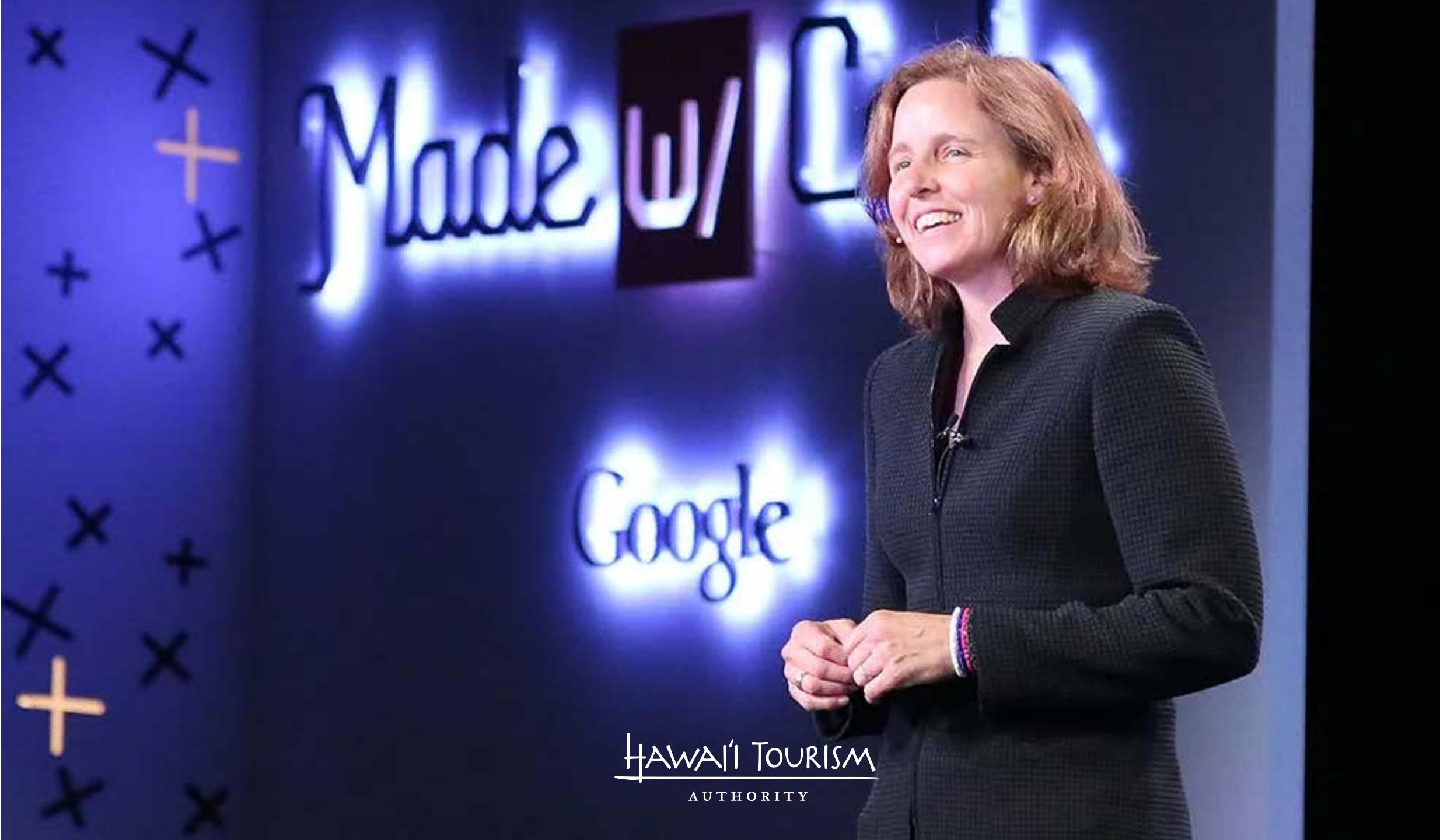
OLD NEW











The Future Belongs To A

Artificial Intelligence



The Future Belongs To





Moonshot thinking aims to achieve something that is generally believed to be impossible. It motivates teams to think big by framing problems as solvable and encouraging "anything is possible" dialogues around how to solve the challenge.





What are the malama moonshots?



malama kekahi i kekahi



malama KU'UHOME

Caring for My Beloved Home

