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December 26, 2024

The Honorable Ronald D. Kouchi,
President and Members
of the Senate
Thirty-Third State Legislature
State Capitol, Room 409
Honolulu, Hawai'i 96813

The Honorable Nadine K. Nakamura,
Speaker and Members of the
House of Representatives
Thirty-Third State Legislature
State Capitol, Room 431
Honolulu, Hawai'i 96813

Dear President Kouchi, Speaker Nakamura, and Members of the Legislature:

For your information and consideration, I am transmitting a copy of the Hawai'i Tourism Authority's (HTA) 2024 Annual Report, as required by Section 201B-16, Hawai'i Revised Statutes.

In accordance with Section 93-16, Hawai'i Revised Statutes, I am also informing you that the report may be viewed electronically at:

<http://dbedt.hawaii.gov/overview/annual-reports-reports-to-the-legislature/>.

Sincerely,

Daniel Nahoopii
Interim HTA President & CEO

Enclosure

c: Legislative Reference Bureau



Hawaii Tourism Authority (HTA) / Ben Ono

2024 Annual Report to the Hawai'i State Legislature Regular Session of 2025

Prepared by Hawai'i Tourism Authority
Department of Business, Economic Development &
Tourism
State of Hawai'i

December 2024



This report satisfies Hawai'i Revised Statutes Section 201B-16.

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FROM THE INTERIM PRESIDENT & CEO

STABILIZING TRAVEL TO HAWAI‘I: ENHANCING EXPERIENCES AND COMMUNITY BENEFITS

Aloha kākou,

On behalf of the Hawai‘i Tourism Authority, we’re excited to share our annual report for 2024. This report includes the work we have done to ensure that tourism is managed in a sustainable way that respects our cultural values, protects our natural resources, and meets the needs of both our community and visitors.

We continue to work to stabilize travel demand to the Hawaiian Islands from our key source markets, optimize the experience of residents and visitors through destination stewardship, and help families and communities realize tourism’s benefits.

In August 2024, Hawai‘i paused to commemorate the one-year anniversary of the devastating wildfires that devastated Lahaina and changed life on the island of Maui forever. The people of Lahaina and Kula showed incredible resilience and resolve for the long road ahead.

In the immediate aftermath of the fires, HTA worked closely with fellow government agencies and visitor industry partners to address the community’s immediate needs, and to plan for tourism’s contribution to Maui’s recovery. HTA continues to support Maui’s recovery by letting prospective visitors in our key source markets know that they are welcome, that coming is caring, and that their visit is supporting recovery. As you will see in this report, the early results are encouraging but show clearly that continued effort is needed.

HTA’s goal is to encourage tourism that makes Hawai‘i better for everyone: visitors, residents, and our environment. We call this model regenerative tourism.

Our key performance indicators address three simple questions:

- How do residents feel about tourism and the way tourism is being managed?
- How do visitors feel about their visit to Hawai‘i?
- Is tourism delivering economic benefits to the people of Hawai‘i?

Put simply, the data shows that our trajectory is positive.

- A majority of kama‘āina feel that tourism should be actively encouraged.
- A majority of visitors say their trip was excellent and would return.
- Tourism’s economic benefits continue to grow, powering spending in small local businesses and state and local tax collection.

We’ll continue working with the Legislature and our fellow state agencies to support initiatives that advance regenerative tourism. By working together, we can ensure that tourism is a net positive for the visitors who come, our community who hosts them, and our beloved island home.

On behalf of our entire team, mahalo for the opportunity to serve the people of Hawai‘i.

Mālama pono.



Daniel Nāho‘opī‘i
Daniel Nāho‘opī‘i
Interim President & Chief Executive Officer

GUIDED BY BOARD OF DIRECTORS



HTA's Board of Directors is a policy-making entity comprised of 12 members, appointed by the Governor of Hawai'i, who serve as volunteers and meet monthly to guide the agency's work on behalf of the State of Hawai'i. Board approval is required for key HTA functions and initiatives, including its annual budget and annual marketing plan, which includes funding support of community programs. Board committees and permitted investigative group (PIG).

The Administrative & Audit Standing Committee reviews and recommends modifications to policies related to the Authority's administration and evaluating the President & CEO. It establishes and oversees internal audit controls by consulting with external auditors, ensuring timely and accurate financial statements, and enforcing a code of conduct for financial integrity. Additionally, handles matters related to legislative and governmental affairs.

BOARD OF DIRECTORS (CONT.)

The Branding Standing Committee reviews, evaluates, and recommends HTA’s branding and marketing initiatives, programs, and/or activities which support the Authority’s vision, mission, goals and objectives including meetings, conventions, and incentive business.

The Budget, Finance, and Convention Center Standing Committee reviews the Authority’s financial reports, investments, and annual budget, including matters related to the Hawai’i Convention Center (HCC). It develops and monitors the annual budget, review financial reports, and recommends actions to the Board. Additionally, it is responsible for the long-term strategic planning of the HCC, including capital improvements, modernization efforts, and facility management.

Ho’okahua Hawai’i Standing Committee develops, reviews, evaluates, monitors, reports, and provides recommendations on issues relating to natural resources, Hawaiian culture, and community.

Governance Study Investigative Group develops the governance, strategic organization, and Business Review Process Study for the HTA.

Legislative and Governmental Affairs Investigative Group develops policy positions and legislation for the 2024 Legislative Session.

IMPLEMENTED BY STAFF



LEADERSHIP

Daniel Nāhoopi’i,
Interim President
& CEO, Chief
Administrative
Officer

Caroline Anderson,
Director of Planning

Isaac W. Choy,
VP of Finance

T. Ilihia Gionson,
Public Affairs
Officer

Kalani Ka’anā’anā,
Chief Stewardship
Officer

STAFF

Jennifer Bastiaanse, Brand
Manager, Branding & Marketing

Jadie Goo, Senior Brand Manager,
Branding & Marketing

Talon Kishi, Budget & Fiscal
Officer

Mei-Lin Bruhn, Administrative
Assistant, Destination Stewardship

Carole Hagihara-Loo, Executive
Assistant & Board Liaison

Trishia Mendoza, Administrative
Assistant, Branding & Marketing

Maile Carvalho, Account
Specialist

Dede Howa, Brand Manager,
Destination Stewardship

Patricia Ornellas,
Destination Manager, Kaua’i

Kristen Colburn, Procurement
Specialist

Iwalani Kūali’i Kaho’ohanohano,
Senior Brand Manager,
Branding & Marketing

Lindsay Sanborn, Brand Manager,
Destination Stewardship

Meagan DeGaia,
Destination Manager, Maui

Amalia Kartika, Contracts &
Administrative Manager

Michele Shiowaki, Administrative
Assistant, Planning

Tracey Fermahin, Procurement
Manager



ABOUT HTA

The Hawai'i Tourism Authority (HTA) serves as the official tourism agency for the State of Hawai'i, tasked with managing the Hawaiian Islands' iconic brand responsibly. HTA's role spans marketing the Islands, preserving Hawaiian culture, protecting the natural environment, and strengthening local communities. Through its stewardship of tourism, HTA aims to improve both the visitor experience and the quality of life for Hawai'i's residents. Central to this mission is the development of sustainable and regenerative tourism practices, guided by HTA's 2020-2025 Strategic Plan.

OUR VISION

“By 2025, tourism in Hawai'i will: Ho'oulu (Grow) the uniqueness and integrity of the Native Hawaiian culture and community; Provide a unique, memorable, and enriching visitor experience; Generate clear community benefits and responsibly manage tourism-related impacts and issues; Support a vital and sustainable economy.”

OUR MISSION

“To strategically manage Hawai'i tourism in a sustainable manner consistent with economic goals, cultural values, preservation of natural resources, community desires and visitor industry needs.”

OUR KULEANA

- Address broad tourism issues by shifting resources into destination management.
- Lead the visitor industry in supporting a strong Hawai'i economy.
- Protect and market the Hawai'i “brand” while managing the destination.
- Place residents' interests and benefits first.

OUR NEXT STEPS

In 2024, a Governance Study was completed by Better Destinations LLC. This study identified an effective structure to govern Hawai'i tourism. It provided recommendations for changes in policy and Hawai'i statutes in addition to describing an organizational structure capable of supporting the recommended approach.

As the board contemplates a new organizational and governance structure, our goal for FY25 is to recover domestic demand and rebuild international travel. The two-year goal FY 26-27 is to manage tourism through the destination management action plans and destination managers.

MOVING TOWARDS A REGENERATIVE TOURISM MODEL

In 2024, the State Legislature expanded the HTA’s responsibilities to include destination management, regenerative tourism, and updating Hawai‘i’s Tourism Functional Plan in accordance with the State Planning Act. These legislative actions aligned HTA’s statute with the ongoing efforts outlined in our 2020-2025 Strategic Plan, as well as with community requests for these changes. These new responsibilities mark a significant shift in Hawai‘i’s tourism approach, emphasizing a regenerative tourism model that prioritizes the sustainability of natural, cultural, and community resources.

Regenerative tourism recognizes the interconnectedness of environmental, social, and economic factors. This tourism approach emphasizes designing and managing tourism to provide net benefits for local communities and destinations. By fostering collaboration, it enables communities to thrive, offering visitors genuine and meaningful experiences while improving the well-being of the environment, residents, and indigenous communities for future generations. The figure below illustrates the key principles of regenerative tourism.

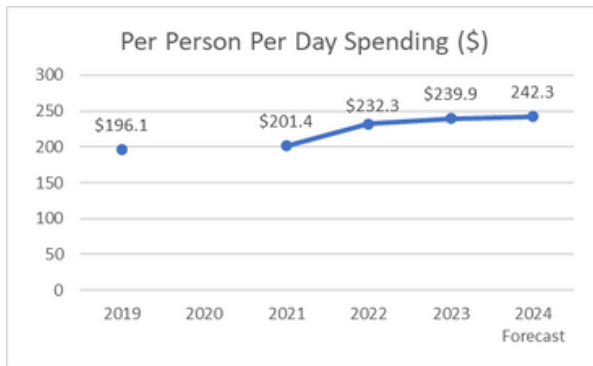


KEY PERFORMANCE INDICATORS (KPIs)

There are four Key Performance Indicators (KPIs) that are continuously monitored by HTA: Resident Satisfaction, Visitor Satisfaction, Average Daily Spending, and Total Spending. Per the strategic plan, we seek to maintain or increase from the base year of 2019.

Economic Indicators – Total Visitor Expenditures and Per Person Per Day Spending

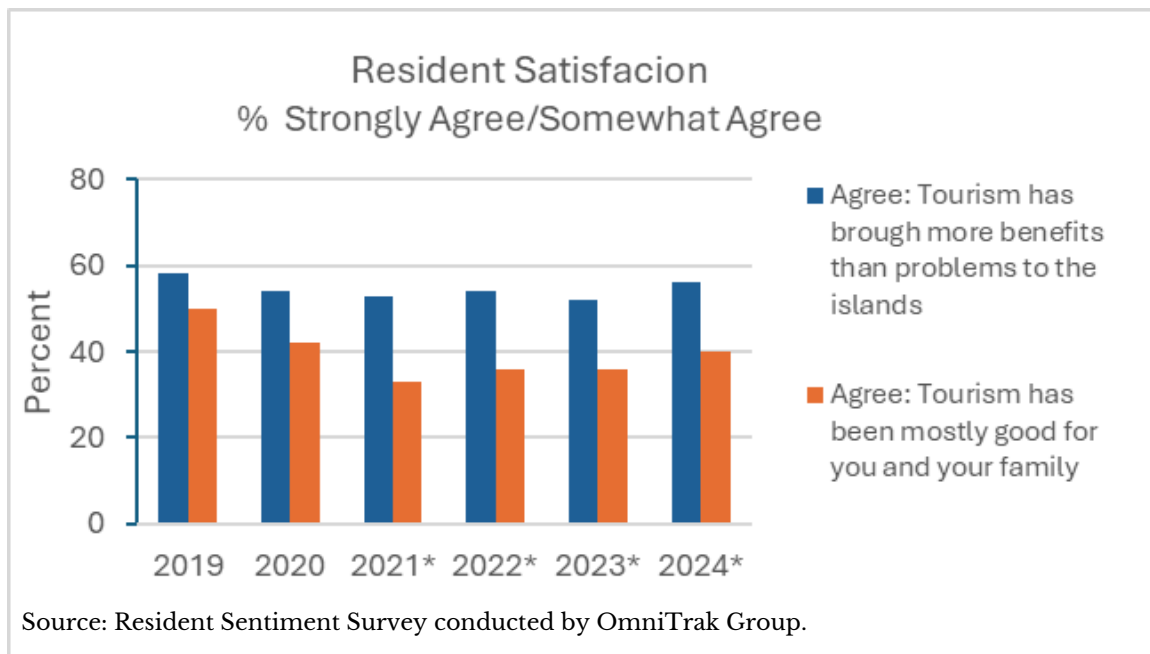
Total visitor expenditures (+5.3%) and per person per day spending (+3.8%) continued to grow in 2023. For the first 10 months of 2024, the average daily visitor spending was \$245.70, compared to \$239.90 for the first 10 months of 2023. While 2024 visitor expenditures is forecasted to decline -1.4%, and per person per day spending will be up +1.0% over 2023. As a result, gains in average daily visitor spending has nearly offset lower visitor arrivals.



N/A = Due to COVID-19 restrictions, fielding for visitor spending was limited for 2020. Annual 2020 visitor spending statistics were not available. 2024 Forecast: DBEDT 4th Quarter 2024 forecast dated December 4, 2024.

Quality of Life Indicator – Resident Satisfaction

The most notable performance results are how residents care about their quality of life and their feelings about tourism. A majority of Hawai'i's residents continue to feel that "tourism has brought more benefits than problems to the islands."

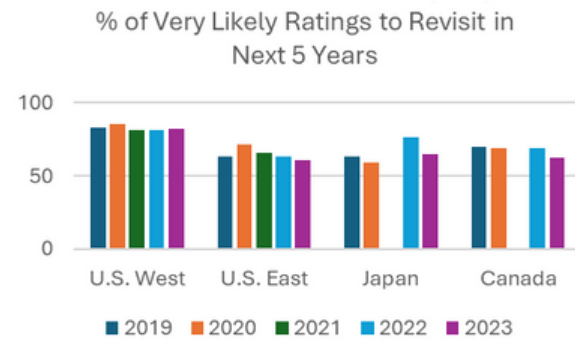
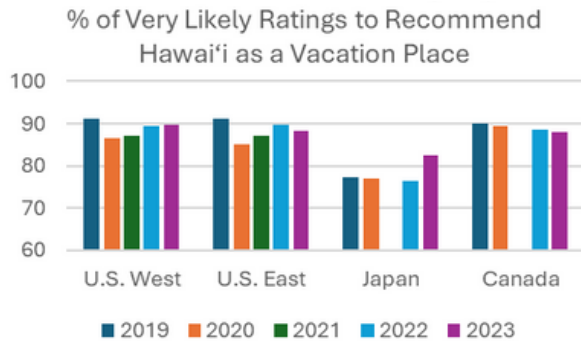
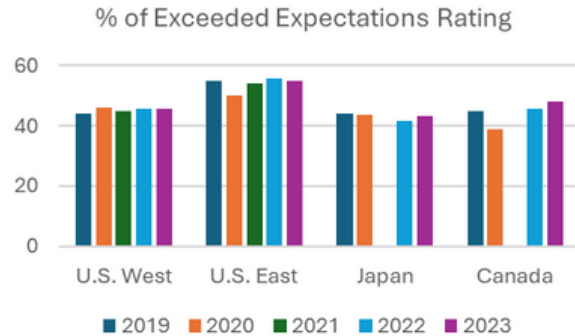
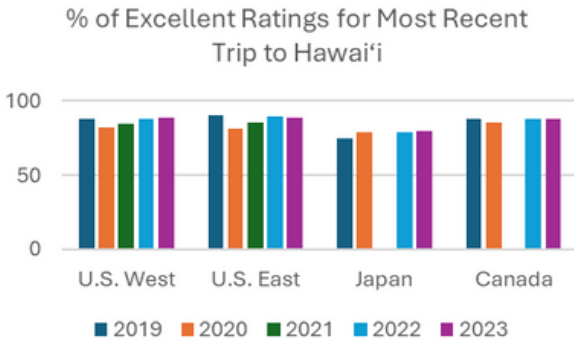


* Beginning 2021, the Resident Sentiment Survey was fielded twice a year. This represents Spring data.

KEY PERFORMANCE INDICATORS (CONT.)

Experience Indicator – Visitor Satisfaction

Visitor satisfaction continues to remain steady post-pandemic. Majority of visitors want to return and are “very likely” to recommend Hawai‘i as a place to vacation.



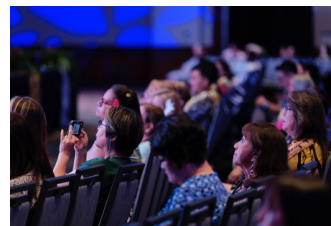
Source: Department of Business, Economic Development & Tourism, Visitor Satisfaction & Activity Report

PUBLIC AFFAIRS



920

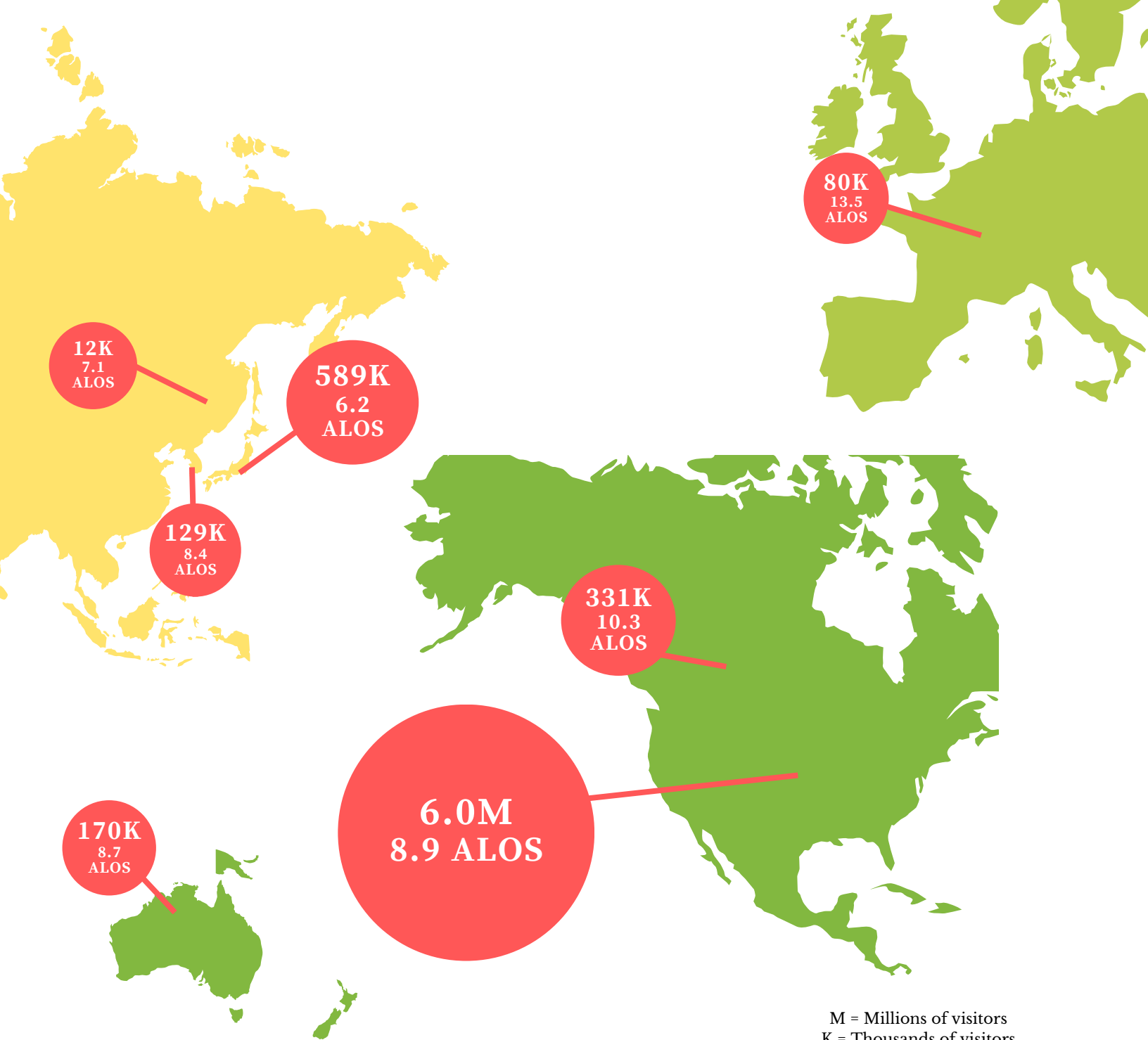
HTA Social Media Posts



650

Attendees
2024 Hawai'i Tourism Conference

* No data available for Number Of HTA News Stories In Hawai'i Media and HTA website views as of the published date.



M = Millions of visitors
 K = Thousands of visitors
 ALOS= Average Length of Stay (Days)

Source: Department of Business, Economic Development & Tourism

A GLOBAL VIEW

Visitor arrivals and average length of stay (ALOS) are also monitored as these are components to total visitor spending. Depicted are the seven major market areas that HTA’s brand marketing efforts are targeted -- U.S., Canada, Japan, Oceania, Korea, Europe and China. Year-to-date October 2024, overall arrivals and average length of stay are down for the state.

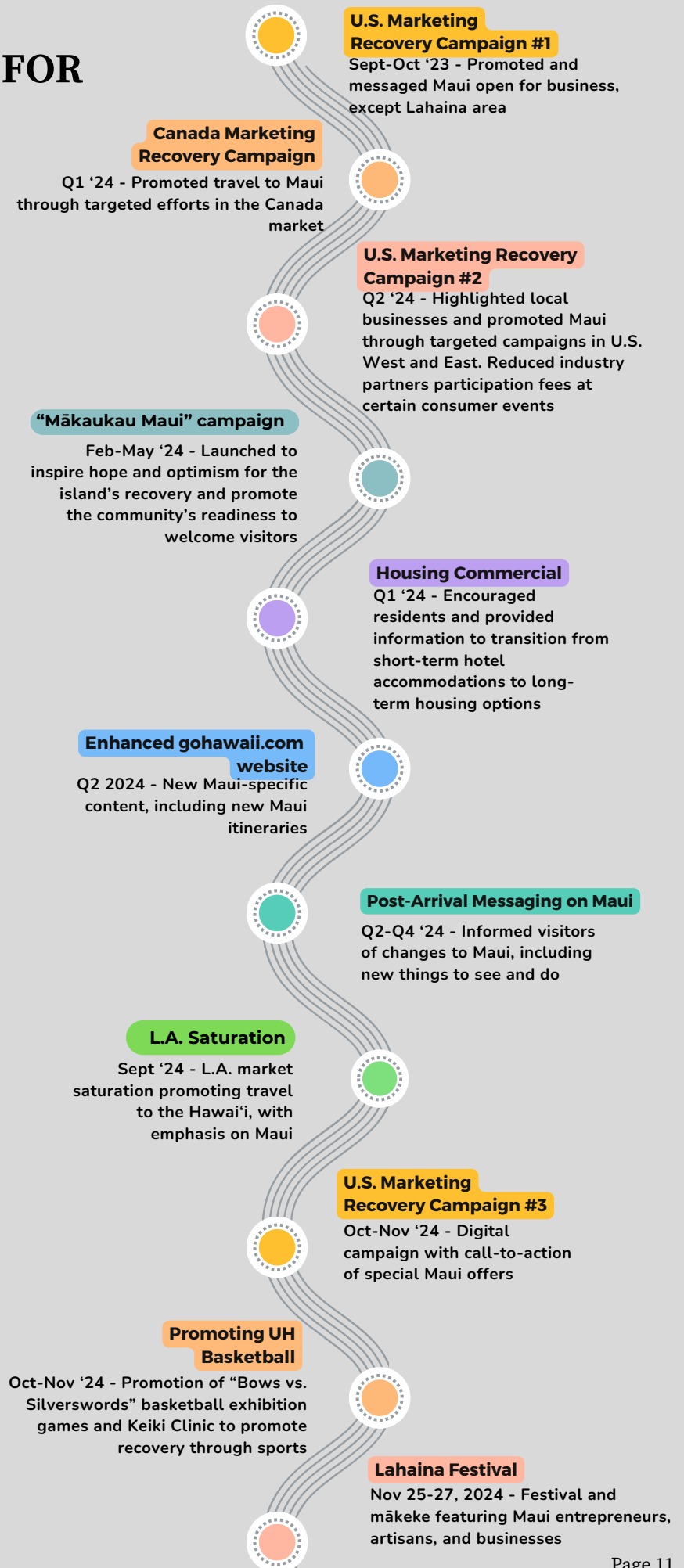
TOURISM EFFORTS FOR MAUI'S RECOVERY

HTA continued to focus on tourism's support for Maui's overall recovery following the August 8, 2023 brushfires. Governor Green declared a state of tourism emergency through his sixth emergency proclamation, and authorized HTA to utilize the \$5 million dollar Tourism Emergency Special Fund (TESF) to respond and provide relief under Hawai'i Revised Statutes 201B-10.

In 2023, \$2.85 million from the TESF was used for the first Marketing Recovery Campaign from September through October 2023 targeted at U.S. visitors, and to cover shelter and luggage expenses for stranded visitors.

HTA's board approved a Maui Recovery Plan in December 2023.

In 2024, \$2.125 million from the TESF funded various recovery initiatives identified in the Recovery Plan to bring visitors to Maui and support Maui's businesses and residents.



MAJOR MARKET DESTINATION BRAND MANAGEMENT

HTA seeks to strengthen tourism’s overall contribution to Hawai‘i by taking the lead in protecting and enhancing Hawai‘i’s globally competitive brand in a way that is coordinated, authentic, and market-appropriate; is focused on Hawai‘i’s unique host and local cultures and natural environment; and supports Hawai‘i’s economy through catalytic programs and projects. Our focus is on educating and attracting mindful visitors with emphasis on lifetime value and positive impact.

Destination brand management and marketing for leisure travel targets seven major market areas (MMAs) with pre-arrival communications to educate visitors with information about safe, respectful, and mindful travel within the Hawaiian Islands that will be coordinated with the HTA’s on-island programs to provide a seamless message throughout the entire visitor journey.

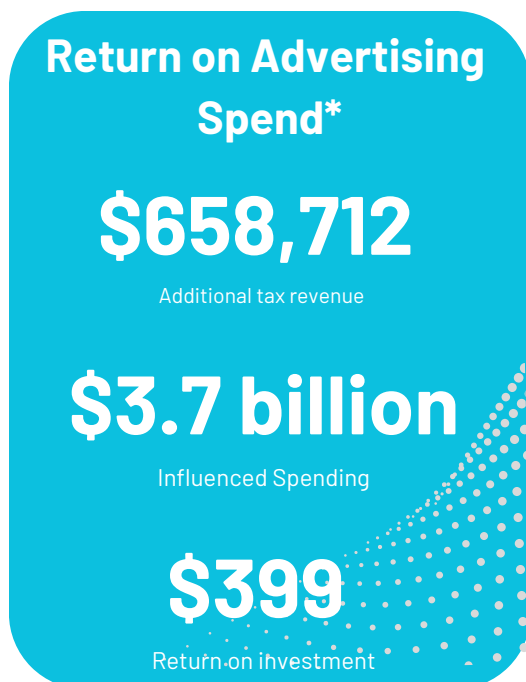
Another key emphasis of the initiative is to drive visitor spending into Hawai‘i-based businesses as a means to support a healthy economy, including supporting local businesses, purchasing Hawai‘i-grown agricultural products, and promoting Hawai‘i-

made products in-market in partnership with the Department of Business, Economic Development & Tourism and the private sector.

Additionally, HTA deploys the marketing opportunity funds when new opportunities arise to drive incremental high value to the State or impact short-term needs due to unexpected circumstances.

In 2024, Hawai‘i faced a decline in visitor arrivals due to several factors, including the aftermath of the Maui wildfires, strong competition from other destinations, and a weak yen, which particularly affected demand from key markets like the U.S. and Japan. To address these challenges, HTA focused on quick-return marketing strategies, such as market saturation activations and co-op programs. These efforts are essential for stabilizing the domestic market and rebuilding international interest.

Despite these challenges, HTA and its Global Market Team (GMT) remains committed to maintaining Hawai‘i’s visibility as a world-class destination and regaining momentum in key markets.



*For U.S. and Japan markets only
Source: SMARI Advertising Effectiveness Study - 2023

U.S. MMA HIGHLIGHTS



Launched in May 2024, “The People. The Place. The Hawaiian Islands” campaign highlights Hawai‘i’s musicians, chefs, and culturalists, focusing on supporting Maui while enhancing each island’s brand. The integrated marketing effort, utilizing earned, digital, and social media, reached nearly 50% of target households in the first half of 2024. The campaign received high communication ratings, with scores of 4.39 and 4.36 for positive feelings about visiting Hawai‘i and Maui, respectively, exceeding the “excellent” rating threshold of 4.2.



**VIEW THE PEOPLE.
THE PLACE. THE
HAWAIIAN ISLANDS
VIDEOS**



204

Travel Trade Education Sessions - U.S.*

*FY 2024



40%

Consider Hawai‘i As Their Next Vacation Destination - U.S.*



In September, HTUSA launched a successful market saturation campaign in Los Angeles, starting paid media on September 1, 2024. Social media exceeded expectations, with Facebook at 5.8 million impressions, Instagram at 4.9 million, and TikTok at 4.6 million. A media blitz from September 17 to 19 generated 36.5 million impressions, and travel education sessions attracted nearly 2,000 advisors. The Aloha Market LA event had 9,328 attendees, leading to several sold-out businesses.



In 2024, the PR team organized the Maui Pavilion at the Healdsburg Wine & Food Experience, attracting over 2,200 attendees. More than 15 ambassadors and 20 local artisans showcased Maui’s offerings, while a fundraising dinner raised over \$75,000 for the Maui Strong Fund. Additionally, the Mana Up Aloha Market in New York featured 40 Hawai‘i-based entrepreneurs from April 25-28, 2024, attracting 9,328 consumers and generating 36,513,073 earned media impressions.

JAPAN MMA HIGHLIGHTS



Launched the “Yappari Hawai’i” campaign to boost travel to Hawai’i, featuring a dedicated website and three themed videos targeting mindful travelers, families, and couples. The campaign used various advertising channels, including social media and print media, achieving over 5.4 million views and 554 million impressions. It also garnered support from 29 Hawai’i businesses to offer value-added incentives for visitors from Japan.



Implemented educational programs to inform travel trade and media professionals through FAM trips, webinars, and seminars. FAM tours offered travel agents, writers, and educators firsthand experiences of the Hawaiian Islands. Online platforms shared updates on Hawai’i’s culture and history. In collaboration with the Hawai’i Promotions Committee Japan and Japan Outbound Tourism Council, HTJ engaged over 4,400 participants in seminars and workshops across Japan.



Partnered with 91 events in Japan, attracting over 1.4 million attendees to promote the Hawaiian Islands. They strengthened relationships with event organizers and distributed promotional materials to boost awareness and bookings. HTJ also participated in two major travel shows: JATA Tourism Expo in October 2023, which drew 156,987 attendees, and Hawai’i EXPO in June 2024 with 11,000 virtual attendees, showcasing campaigns, Hawaiian culture, and made in Hawai’i products.



7%

Consider Hawai’i As Their Next Vacation Destination - Japan*



204

Travel Trade Education Sessions - Japan*

*FY 2024

CANADA MMA HIGHLIGHTS



Collaborated with the Maui Visitors & Convention Bureau and conducted a media mission in Vancouver, featuring a television interview on Global News and a media event for 20 journalists. These efforts effectively communicated Maui's readiness for visitors following recent challenges



Hosted 2023 Aloha Canada, a key event for travel advisors and journalists focused on Hawai'i. It featured successful media interviews in Toronto and Vancouver, travel agent events in multiple cities, and a trade show with over 200 advisors and 14 partners from Hawai'i. Cultural practitioners educated and entertained attendees, while travel media coverage enhanced the event's visibility.



Conducted a Travel Media FAM on Kaua'i & Maui to bring Canadian media attention to Maui's recovery efforts. The event attracted top journalists from digital media and Canadian travel publications, helping convey the message of Maui being open and safe for travel. The group also visited Kaua'i to explore agritourism and culinary experiences.

OCEANIA MMA HIGHLIGHTS



Partnered with We Are Explorers, an award-winning content creation company that connects brands with Australians and New Zealanders through adventure, travel, and conservation. This initiative reached over 3 million "modern-day explorers" monthly, promoting outdoor accessibility and appreciation for nature.



Partnered with Tagata Pasifika, New Zealand pacific focussed TV show, to cover the Festival of the Pacific, including a focus on recovery efforts in Maui. Their coverage reached an audience of 60,000 via broadcast and 300,000 online, including a 30-minute FestPAC special.



Collaborated with International Traveller Magazine featured the 50 best experiences across the Hawaiian Islands in a special 20-page edition, reaching 150,000 readers.

KOREA MMA HIGHLIGHTS



Launched a digital campaign for Air Premia’s seasonal route from ICN to HNL (Dec 2023 - Mar 2024) to promote services and boost ticket sales. This included promotions on Facebook, Instagram, KakaoTalk, and Google Display, resulting in 90 new content pieces, 2,250 flight bookings, 13.75 million impressions, and a reach of 62,566 people.

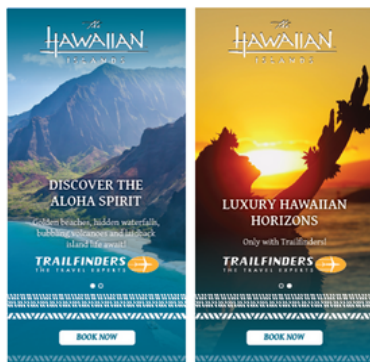


Implemented the “My True Aloha” campaign with airlines and travel agencies to showcase Hawai’i’s authentic culture and beauty. This featured a training program and a Fam tour, leading to seven certified travel agents and six new tour products. The campaign generated 1.5 million impressions, reached 648,000 unique viewers, and resulted in 3,460 bookings.



Collaborated with Magazine F, celebrity Sung Si-kyung, and Chef Park Joon-woo to promote Hawai’i’s culinary culture at the Hawai’i Food and Wine Festival, followed by a pop-up event. This garnered a print article in Magazine F (10,000 copies), 503,400 YouTube views, and 30,000 impressions on Instagram.

EUROPE MMA HIGHLIGHTS - BACK IN MARKET



Launched the Discover Hawai’i cross-platform digital campaign in March, boosting brand awareness and engagement among affluent travelers in UK, Germany, and Switzerland, with key partners including Trailfinders, DER Suisse (Kuoni), and CANUSA. By end of June, 8 million were reached, 17.7 million impressions delivered, and 22,842 click-throughs to tour operator sites and gohawaii.com.



Organized three FAM trips in the first half of 2024: A product manager trip from the UK, Germany, and Switzerland in June, visiting Maui and Kaua’i and two individual press trips in May.



Executed a tactical, multi-channel co-op campaign in Germany with Condor from May to July, achieving 3.5 million impressions and reaching 2 million users. The video component garnered 1.07 million views. Overall, this campaign contributed to an increase in passenger bookings, reaching the target of 4,426 by September 2024.

CHINA MMA HIGHLIGHTS

Unlike the other markets, representation in China is through a general sales agent versus full representation office.

- Conducted its first post-pandemic China Travel Mission from May 27 to May 31 at Shanghai ITB, followed by a networking event at the U.S. Embassy in Beijing. The mission engaged over 150 travel agencies and facilitated 200 meetings with 13 local stakeholders.
- Executed a social media strategy, publishing over 190 posts on platforms like WeChat and Douyin, generating 5.5 million impressions.
- Continued to educate the travel trade and media through partnerships, participated in 11 tourism roadshows and conducted 10 travel trade seminars, that reached 10,000 attendees across China. In November 2023, HTC partnered with Japan Airlines for a FAM trip with 27 participants from key travel companies, exploring O’ahu and Hawai’i Island.



SUPPORTING THE BRAND

HTA contracts with the Hawai’i Visitors and Convention Bureau to manage and support the brand. This includes social media content management, distribution, and monitoring across markets; gohawaii.com website optimization and maintenance; developing assets and maintenance of the digital assets library (Knowledge Bank); and managing and updating shared resources for our GMT. The island visitors bureaus work closely with HTA, the Global Marketing Team members and visitor industry partners and community members to bring awareness to each island’s unique concerns, and tourism products such as accommodations, activities, and tours.



Source: Kanu Hawai’i
March-Sep 2024

1,273 Guests
5,279 hours of service

482
Volunteer opportunities
participated in
through gohawaii.com

Island Visitors Bureaus Support

30

Promotions, Trade Shows, and Missions

71

Destination Trainings and Educational Sessions

91

Destination Consultation Services

Jan-June 2024

Knowledge Bank



436

New images

IPW 2024



214

Trade Appointments

195

Media Appointments

GLOBAL MEETINGS, CONVENTIONS AND INCENTIVES (MCI)

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

The Meet Hawai'i team engages with meeting planners and media throughout the year emphasizing mindful tourism, providing Hawai'i updates, and booking MCI business across the Hawaiian Islands.



35
TRADESHOWS

584
TRADESHOW APPOINTMENTS

16,028
TRADESHOW ATTENDANCE

1,246
MCI SALES CALLS

211
MCI EDUCATION SESSIONS

8,366
MCI EDUCATION PARTICIPANTS



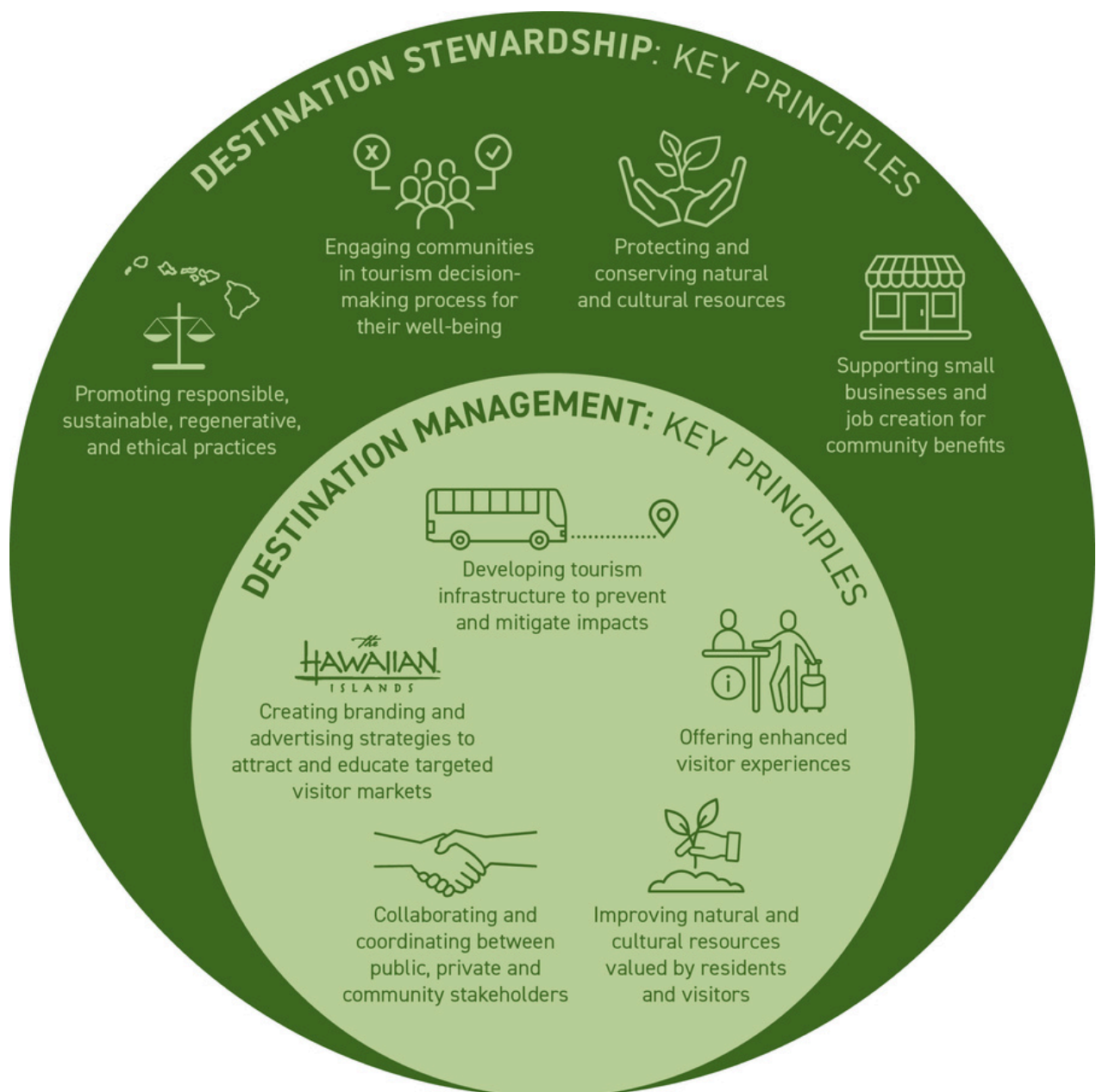
| | Room Nights | % to YTD Goal |
|---------------------------------|-------------|---------------|
| Total Citywide Tentative | 291,385 | +96% |
| Total Citywide Definite | 97,765 | +87% |
| Total Single-Property Tentative | 421,279 | +99% |
| Total Single-Property Definite | 94,372 | +69% |

Data as from Jan-Sep 2024

DESTINATION STEWARDSHIP

The 2024 State Legislature Session codified Destination Management (Act 225, SLH 2024). The Hawai'i State Legislature also appropriated funding for five new island-based destination managers, strengthening the HTA's Destination Management program. This program focuses on balancing the economic, environmental, and cultural impacts of tourism through strategic planning and community engagement.

The figure below illustrates the relationship between destination stewardship and management. Destination stewardship in Hawai'i emphasizes a regenerative tourism approach, ensuring the islands' stunning natural beauty, rich cultural heritage, and vibrant communities thrive for generations to come. By balancing the needs of residents, visitors, and businesses, we create a flourishing economic future. Key to this is destination management, which focuses on elevating visitor experiences and generating revenue while safeguarding Hawai'i's unique identity. Collaboration among all levels of government, industry stakeholders, and the community is essential for both stewardship and management.



DESTINATION MANAGEMENT ACTION PLANS

The first iteration of Destination Management Action Plans (DMAPs) were developed in 2020/2021 and concluded in 2024. HTA hired a 3rd party contractor, Pacific Research & Evaluation, to review and evaluate the overall progress of each plan and provide recommendations as HTA starts the planning for the next round of DMAPs.







With the 2024 Legislature recently granting HTA five new island-based destination managers, the Destination Management program is tasked with balancing the economic, environmental, and cultural needs of Hawai'i's tourism industry through strategic planning and community engagement. Working closely with residents and industry stakeholders, HTA will update the island-specific destination management action plans to guide sustainable tourism growth.

The next six pages provide a snapshot of the completion rate of each island's DMAP as of July 2024 in addition to highlighting some of the key projects over the last three years that helped move the actions forward. Also identified are hotspots (areas/sites of concern) that were addressed through DMAP activities.

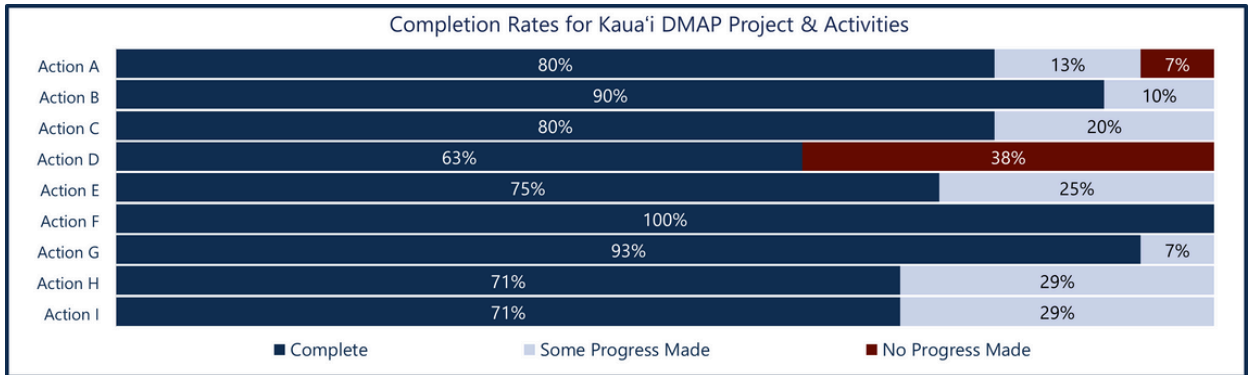


KEY PERFORMANCE INDICATORS

-  Across all markets, survey results indicated high levels of satisfaction in visitors to Hawai'i. Visitor satisfaction was maintained or improved between 2019-2023.
-  Total visitor spending increased between 2019-2023.
-  Resident favorability ratings of tourism as an industry in Hawai'i have increased from 2021 to 2024.
-  Residents that are aware of HTA's destination stewardship initiatives have more positive perceptions of tourism and tourism management.

DESTINATION MANAGEMENT ACTION PLANS

KAUAI: DMAP ACTIONS

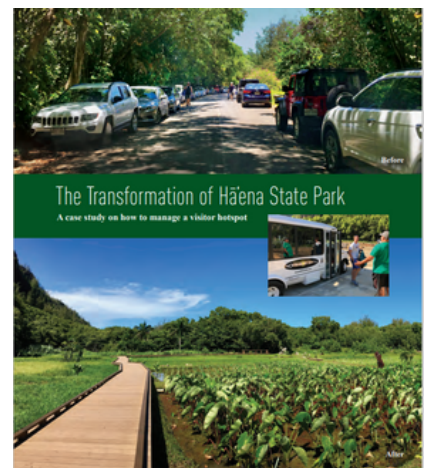


Selected key initiatives for the Kauai DMAP that were funded by HTA:

- Alakoko Storefront opened in January 2022. Provides a physical and online shop for locally designed and handcrafted products.
- Five Mālama Kauai videos
- Airport campaign providing messaging about being a responsible visitor being rolled out in April 2022.
- A Makali'i List developed, which is a master list of organizations and cultural practitioners who help build a program to educate visitors, new residents, and local community on our cultural values.
- Mobile Mele Series which includes County of Kauai's Kauai Made Program held on June 22, 2024 at Outrigger Kauai Beach Resort and June 29, 2024 at Grand Hyatt Kauai.
- Printing of "The Transformation of Ha'ena State Park: A Case Study on How to Manage a Visitor Hotspot"

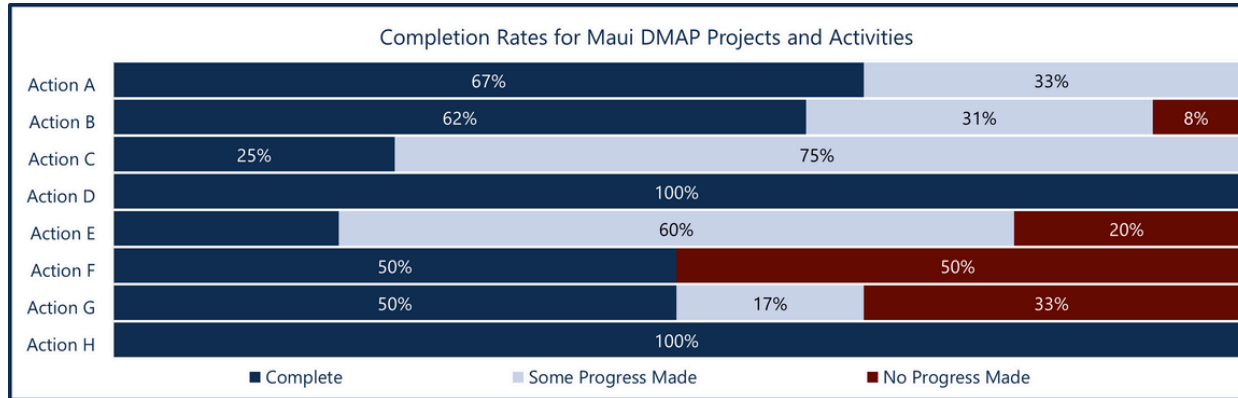
Selected Kauai hotspots that HTA put resources behind:

- Kalalau Trail, Ke'e Beach Park, Ha'ena State Park, and Hanakapi'ai Falls: Visitor education and promotion of the shuttle and reservation system.
- Po'ipu Beach: Visitor messaging.
- Ho'opi'i Falls: Visitor messaging.
- Lumaha'i Beach: Visitor messaging.
- Queen's Bath: Not promoted to visitors.



DESTINATION MANAGEMENT ACTION PLANS

MAUI: DMAP ACTIONS



Selected key initiatives for the Maui DMAP that were funded by HTA:

- East Maui Tourism Management Pilot Program at various hotspots along Hāna Highway, including Waioka and Ke‘ānae. Worked with the East Maui Advisory Group to develop the program. The organizations gathered visitor data, conduct resident satisfaction surveys and in depth ‘ohana surveys, determine site access and carrying capacity and create community-supported messaging for visitors pre and post arrival.
- 75+ Cultural and Education Training Sessions held via Native Hawaiian Hospitality Association.
- Maui Aloha Shuttle pilot program between airport and resort areas in Summer 2021. Program did not resume due to low ridership
- 20 Mineral-Only Sunscreen Dispensers installed for free public use on popular beaches (e.g., Wai‘ānapanapa State Park & Whalers Village).
- HTA convened meetings with the County, Maui Police Department, Department of Land and Natural Resources, DOT-Highways, the National Park Service, Maui Visitors and Convention Bureau, and Maui Hotel and Lodging Association to address Visitor Impacts on Hāna Highway. DOT-Highways installed No Parking signs warning of the fines. MPD increased its presence and ticket citations in June/July 2021. Developed communications piece for visitor industry amplification.

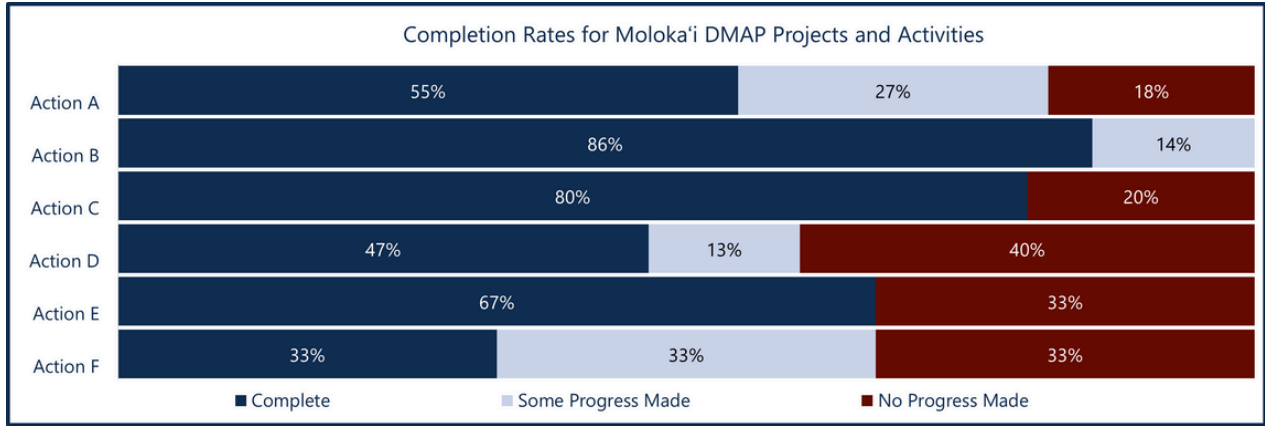
- Five properties recruited and supported to join the Rise Above Plastics on Vacation Program through partnership with Surfrider Foundation.
- The Reef-friendly Landscaping Pilot Program, in which resorts stop the usage of chemical landscaping on a portion of their property. A total of 14 partners were brought on.

Selected Maui hotspots that HTA put resources behind:

- Hwy 360, Mile Marker 6.5 Bamboo Forest: Included as a site in East Maui Tourism Management Pilot Program (7/2023).
- Waioka (Venus Ponds): Included as a site in East Maui Tourism Management Pilot Program (7/2023).
- Highway 30: Honolua Bay to Kahakuloa Bay: Sunscreen dispenser. Not promoted to visitors.
- Nākālele Blowhole: Safety messaging; not promoted to visitors.
- Kaihalulu Bay (Red Sand Beach): Messaging; not promoted to visitors.
- Highway 330: Kukui Bay to Huakini Bay, Haleakalā, ‘Ohe‘o Gulch/Seven Sacred Pools, Pu‘u Keka‘a (Black Rock): Messaging.
- Helele‘ike‘oha Falls, Puka Maui coastline, Honomanu Waterfall, Waikani Waterfall, Wailuaiki Pool: Not promoted to visitors.

DESTINATION MANAGEMENT ACTION PLANS

MOLOKA'I: DMAP ACTIONS



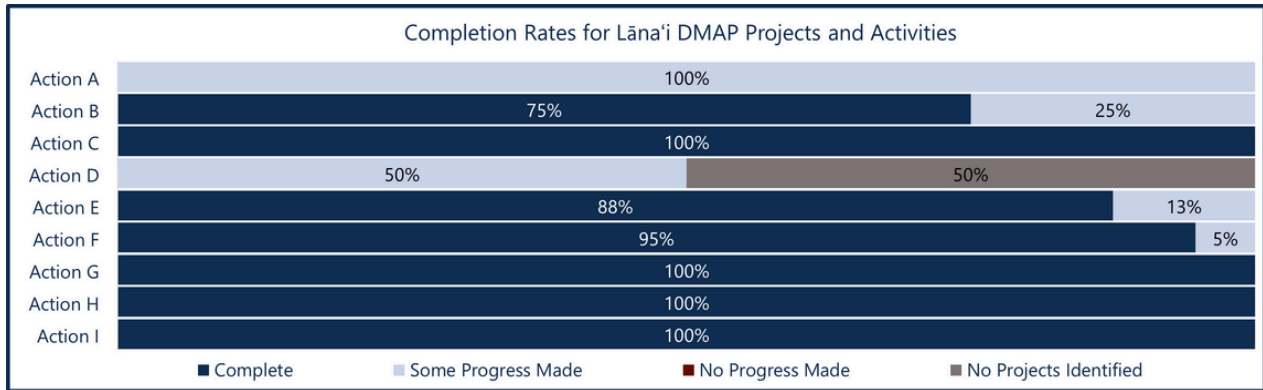
Selected key initiatives for the Moloka'i DMAP that were funded by HTA:

- Moloka'i Task Force resulted from merging of Moloka'i Advisory Group and Steering Committee. Prioritized four DMAP actions to work on.
- Developed a Moloka'i Educational Pamphlet for visitors.
- Needs Assessment Studies completed in Q1 2023 for nonprofits and business entities who desire to get into the visitor industry.
- County of Maui's Office of Economic Development held Business/Organizational Capacity Webinars through the Kuha'o Business Center on Moloka'i (2021).



DESTINATION MANAGEMENT ACTION PLANS

LANA'I: DMAP ACTIONS

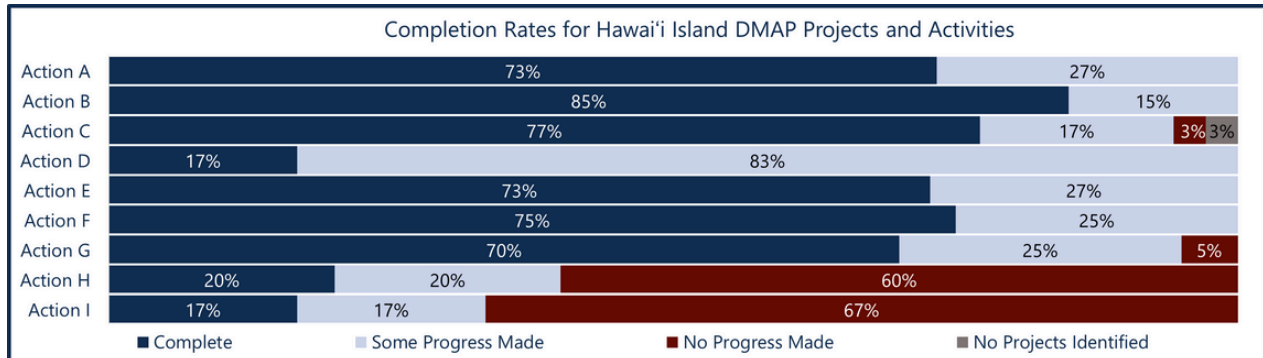


Selected key initiatives for the Lāna'i DMAP that were funded by HTA:

- The enhanced Lāna'i Guide App has been updated and is promoted by HTA's Global Marketing Team.
- Lāna'i Advisory Group formed to guide messaging of Lāna'i City and suggest regenerative tourism activity ideas. As a result, online and social media content developed by MVCB and new day-trip itineraries developed.
- New community-created Lāna'i Brochure featuring newly procured photos, community-supported messaging, a map of Lāna'i City, a day-trip itinerary and a QR code for the Lāna'i Guide App.
- One Malama Maui County Pledge Video played on expeditions ferry and on their website, and in-room at Four Seasons Resort Lāna'i.
- Updated Expeditions Ferry website to include a day-trip itinerary, map of Lāna'i City, and information on multiple ways to book transportation.
- Malama Lāna'i Service Day-Trip Program organized through partnership with Sail Trilogy, Pūlama Lāna'i and Expeditions Ferry in May 2022.

DESTINATION MANAGEMENT ACTION PLANS

HAWAI'I ISLAND: DMAP ACTIONS



Selected key initiatives for the Hawai'i Island DMAP that were funded by HTA:

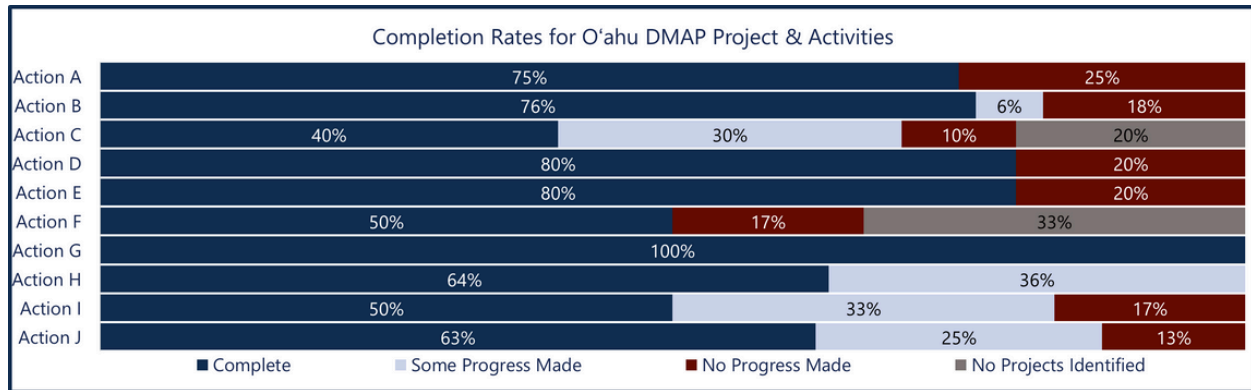
- Hawai'i Island Community-Based Action Stewardship Program which supported two stewardship contracts to mitigate impacts at Kealakekua and Punalu'u. 'Āina Based Stewardship Program at Kealakekua (Ho'ala Kealakekua Nui, Inc.) includes the development of a web site to educate visitors, residents, and commercial tour operators about proper code of conduct to respectfully interact with Kealakekua Bay and training citizen scientists to monitor the health of the area.
- Ka'ū Hō'ā Pii 'Āina Training program in Punalu'u ('Ohana O Honu'apo) includes recruiting, hiring, and developing a training program for ten volunteer stewards on how to best serve the 'āina in Ka'ū Moku through a place-based perspective, focusing on culturally and ecologically sound practices in addition to how to best interact with residents and visitors in sensitive places.
- Communications Plan and Campaign targeted at residents about the benefits of tourism to communities.

Selected Hawai'i Island hotspots that HTA put resources behind:

- Waipi'o Valley: Island of Hawai'i Visitors Bureau organized facilitated community meetings/Action Plan in Spring/Summer 2022. New signage up in May 2023.
- Pololū Valley: Piloted stewardship program to May 2022-Jan 2023.
- Kealakekua Bay State Historical Park and Punalu'u: IHVB issued RFP to assist with stewardship.
- Ka'ū – Papakōlea/Green Sands Beach: HTA provided letter of support in Spring 2022 for a proposal submitted by a nonprofit organization. IHVB issued RFP to assist with stewardship.
- Kahalu'u Bay: IHVB communicated training videos. HTA supported nonprofit organization with funding from Aloha 'Āina program.
- Kumukahi: Site visit in May 2023 by County, HTA and IHVB with community members. HTA followed up with DLNR on next steps.
- Keaukaha: Supported Stewardship Pilot Program/County's Resiliency Corp. IHVB worked with County; issued and awarded RFP to assist in educational training and program development.
- Pohoiki: HTA/County Community Tourism Collaborative – Community events/stewardship action plan in Q3 2022-Q1 2023.
- Hawai'i Volcanoes National Park: Provided communications.

DESTINATION MANAGEMENT ACTION PLANS

O'AHU: DMAP ACTIONS



Selected key initiatives for the O’ahu DMAP that were funded by HTA:

- New content development and augmented reality to enhance the Waikīki Historic Trail.
- Support for Honolulu City Council passed Bill 41 which regulates short-term vacation rentals, including improved enforcement; County ordinance No. 22-7 went into effect in October 2022.
- More than 76 cultural and educational training sessions conducted by Native Hawaiian Hospitality Association (NaHHA)
- Post-arrival behavioral messaging on Waze driving app
- HTA’s Pono Travel Education Program at Daniel K. Inouye International Airport and all major airports statewide includes kuleana and mālama messaging, as well as ocean safety videos at available prime locations to reach most of the traveling public.
- Support for the City and County of Honolulu’s launch of the O’ahu Good Food Program along with the visitor industry.
- Reservation systems at Hanauma Bay Nature Preserve and Diamond Head (Lē’Ahi) state monument implemented. HTA promotes these to visitors.
- OVB and the City and County of Honolulu Office of Economic Revitalization worked together on a tour of cacao and honey producers that may be ready to promote as an agritourism trail.
- Supported the Waikīki Hula Mound Hula Show.
- Get Around O’ahu website content migrated to be included in gohawaii.com

Selected O’ahu hotspots that HTA put resources behind:

- Koko Head Crater: Supported City with a timed lock to open gate earlier for early hikers.
- Kailua Town and Beach: Education; limited promotion
- Stairway to Heaven: Not promoted to visitors
- Hālonā Blowhole: Continued safety messaging.
- Hanauma Bay Nature Preserve: Messaging about the City’s reservation system.
- Diamond Head State Monument: Messaging about DLNR’s reservation system.
- Lulumahu Falls: Messaging to not visit this hotspot, which is on private land.
- Ma’eli’eli Trail and He’eia State Park: Continued messaging; not promoted to visitors.
- Waikīki Beach: Messaging.

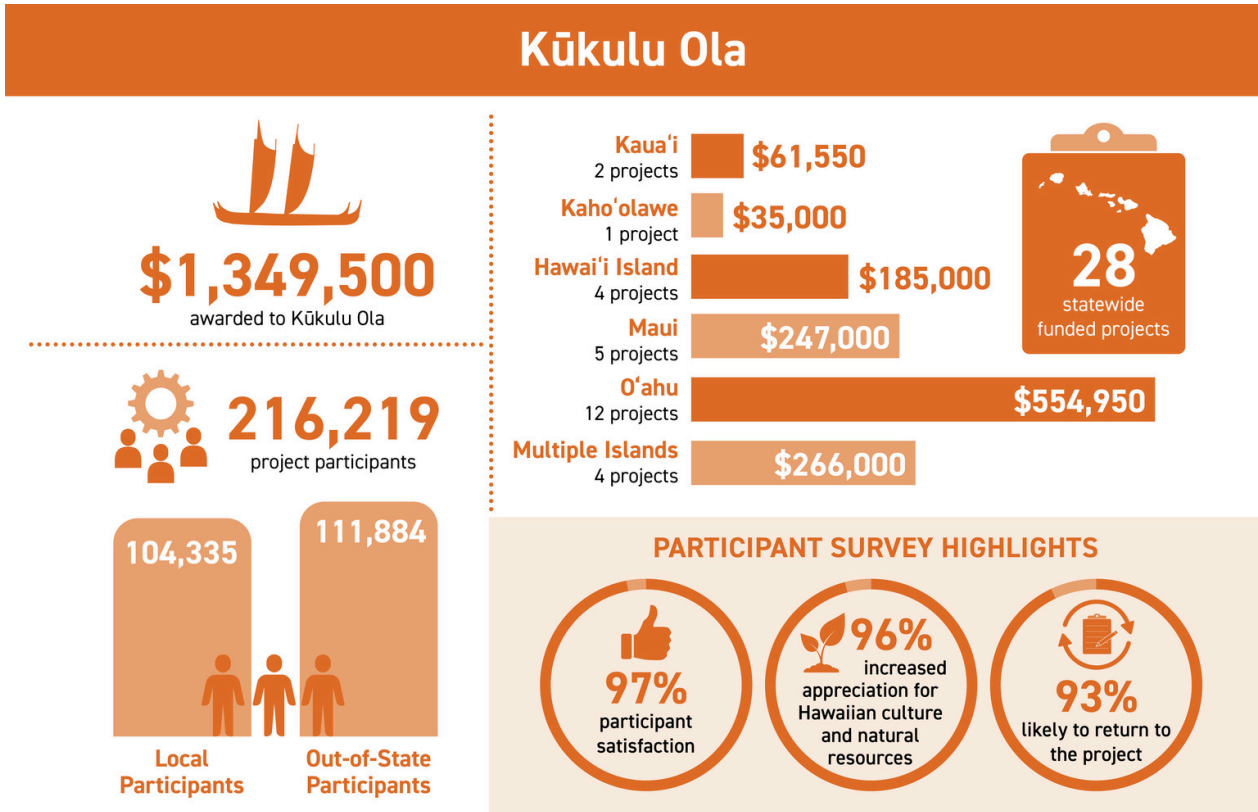
HAWAIIAN CULTURE INITIATIVE

A Hawaiian proverb “Ho’okahi wale nō lā o ka malihini,” or “A guest for only a day,” implies that guests become contributing members of the community with shared kuleana of protecting all that is Hawai’i. This is fulfilled with aloha - feelings of affection, compassion, mercy, sympathy, kindness, grace, and charity – a sense of mālama.

HTA’s strategy under this initiative is to enhance the authenticity of Hawai’i in the tourism industry by reinforcing the values embedded in its host culture and supporting Hawaiian programs and cultural practitioners, craftsmen, musicians, linguists, and artists, preserving and perpetuating Hawaiian culture.

In Fiscal Year 2024, HTA supported the perpetuation of the Hawaiian culture through:

- The Kūkulu Ola Program which supports community-initiated projects that preserve the Native Hawaiian culture into the future. Funding was used to support community projects to encourage long-term cultural preservation efforts that enhance, strengthen, and perpetuate Hawaiian culture.
- The 13th Festival of Pacific Arts and Culture (FestPAC), the world’s largest celebration of indigenous Pacific Islanders, convened in Honolulu, Hawai’i from June 6-16. HTA’s Chief Stewardship Officer served as the Chair for the FestPAC Commission.



*results from 2023/2024 Kūkulu Ola projects

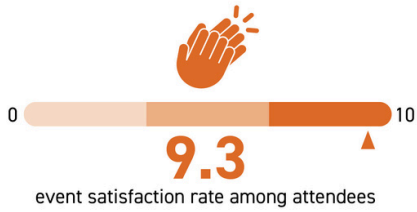
2024 FestPAC
RESULTS

\$1.2 MILLION
HTA cash and in kind contribution since 2016

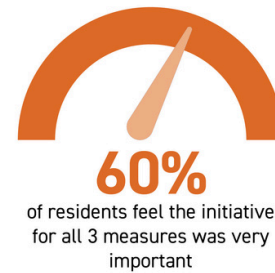
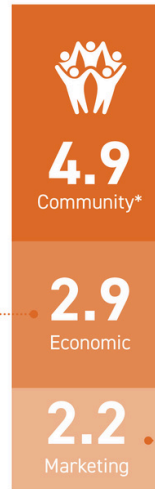
Festival of Pacific Arts and Culture (FestPAC)



ATTENDEE SURVEY HIGHLIGHTS



RESIDENT SURVEY HIGHLIGHTS



*Respondents distributed 10 points among the three measures to reflect their perceived importance



VISITOR SURVEY HIGHLIGHTS



30% of visiting attendees traveled to Hawai'i for other reasons



NATURAL RESOURCES INITIATIVE

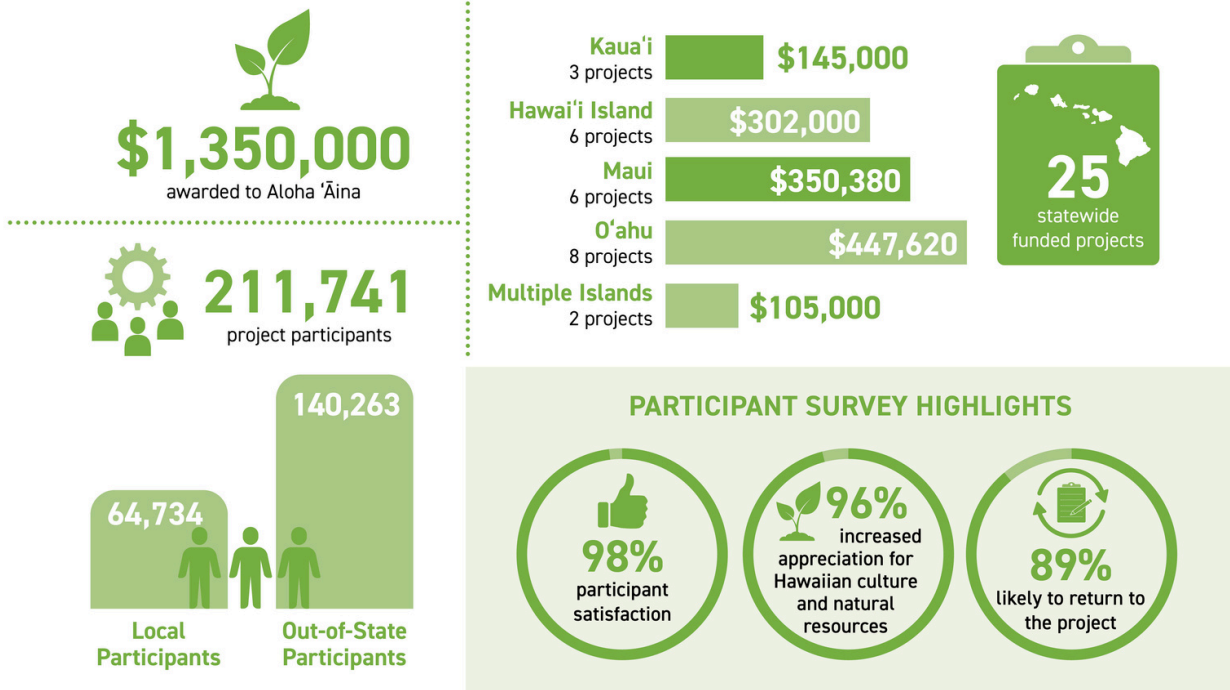
HTA supports programs that protect, maintain, and enhance Hawai'i's natural resources and cultural sites, improving the quality of life for all residents and the visitor experience.

HTA's Kahu 'Āina program, formerly known as Aloha 'Āina, supports community-initiated projects focused on managing, improving, and protecting Hawai'i's natural environment.

Staff managed the Hawai'i Community Foundation, which administered projects from July 1, 2023, to June 30, 2024, using FY 2023 funds. In FY 2024, staff oversaw the Council for Native Hawaiian Advancement's Kilohana Collective, responsible for administering the Kahu 'Āina program on behalf of HTA.

HTA also worked DBEDT's Hawai'i Green Business Program to make the program more accessible to smaller businesses and events in communities statewide. During the FY24, the Hawai'i Green Business Program recognized 40 additional businesses who demonstrated their commitment to conserving energy and water reducing waste, and protecting Hawai'i's environment.

Aloha 'Āina



*results from 2023/2024 Aloha 'Āina projects

VISITOR EXPERIENCES INITIATIVE

The primary objective of HTA’s Visitor Experience Initiative is to enhance the visitor experience while also preserving and promoting Native Hawaiian culture in addition to Hawai‘i’s multi-ethnic cultures and communities. This is achieved by fostering genuine, respectful, and accurate visitor activities and programs that connect tourists with the rich heritage of Hawai‘i, all while supporting local cultural practitioners, artists, and craftsmen to ensure the preservation and perpetuation of Hawaiian culture and the local culture of Hawai‘i.

There are six programs under this area:

- The Signature Events Program
- Resort Area Hawaiian Cultural Initiative (RAHCI)
- Visitor Assistance Program (VAP)
- Community Enrichment Program
- Kāhea Greetings Program (Airports and Harbors)
- The Visitor Education Post-Arrival Marketing Program

The Signature Events Program in Hawai‘i supports major events that promote the state’s image and attract attendees from outside. These world-class events enhance competitiveness, generate media exposure, and provide economic benefits.

Signature Festivals & Events



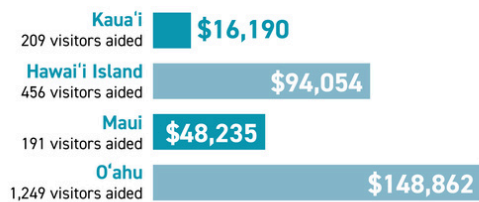
The RAHCI program brings cultural practitioners, craftsmen, musicians, linguists, and/or other artists to help preserve and perpetuate Hawaiian culture in a way that is respectful and accurate to resort areas across the islands to residents and visitors alike. This program also helps to connect people to place while educating them about the places they’re visiting.

Resort Area Hawaiian Cultural Initiative



The Visitor Assistance Program provides support, resources, and guidance to visitors who are victims of crime and other adversities while traveling in Hawai‘i. Services include providing phone cards, transportation, meals, hospital visits and moral support, replacing lost IDs, assisting with hotel and airline bookings, and more.

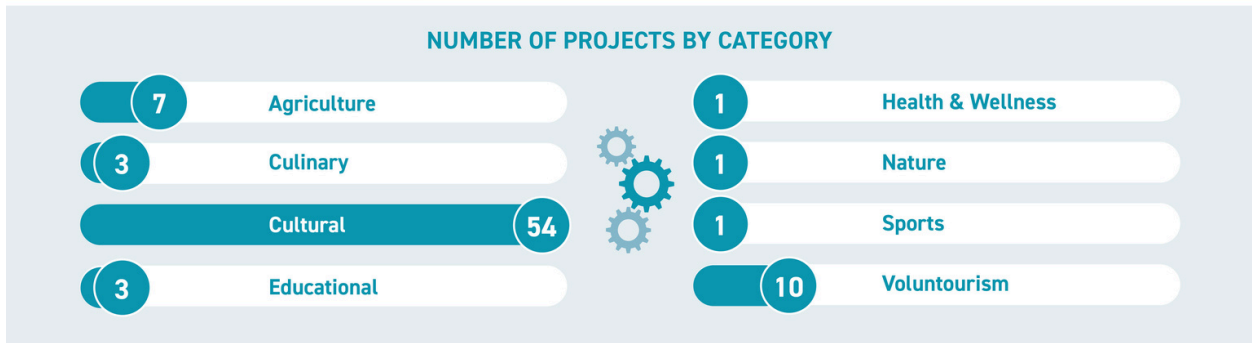
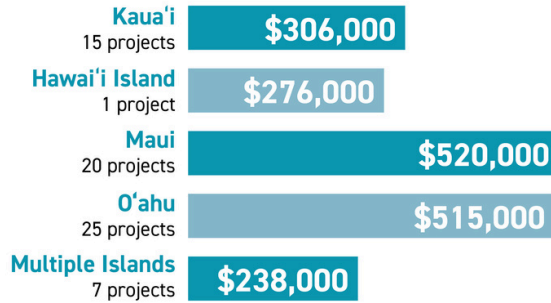
Visitor Assistance Program



VISITOR EXPERIENCES INITIATIVE (CONT.)

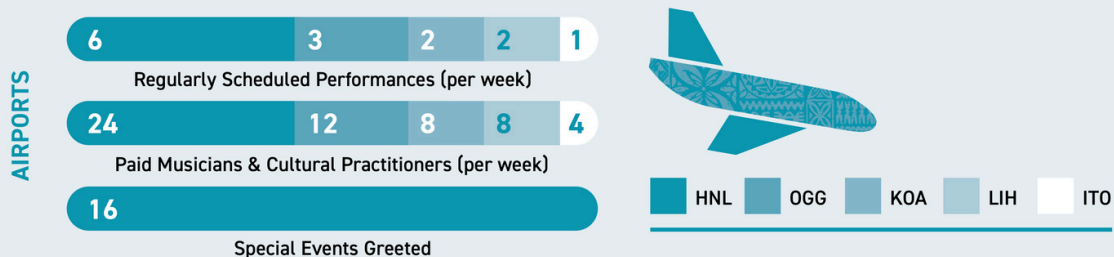
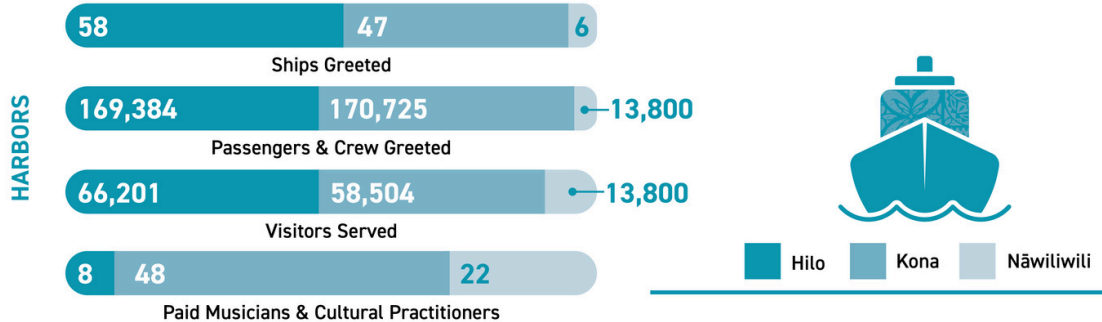
Community Enrichment Program fosters community-based tourism projects that provide unique, authentic, and highly-valued visitor experiences and represent activities that are developed by our community, for our community, and are things the community wants to share with our visitors.

Community Enrichment Program



The Kāhea Greetings Program at airports and harbors offers free, year-round Hawaiian entertainment and visitor education across the state, fostering a Hawaiian sense of place.

Kāhea Greetings Program



VISITOR EXPERIENCES INITIATIVE (CONT.)

VEPAM aims to educate visitors about how to travel responsibly, respectfully, and safely during their stay in the Hawaiian Islands. Current platforms include prime locations located in airports and static and digital platforms. Other opportunities include hotel room messaging, TV, and geo-targeting capabilities to reach our visitors throughout their stay on the islands.



| | |
|-------------|---------------|
| Goal | Actual |
| 71.2 | 86.0 |
| impressions | impressions |

SPORTS

HTA is committed to supporting amateur, collegiate, and professional sports programs and events seeking to hold tournaments, exhibitions, and other activities in Hawai'i. Such events and programs extend the brand image of and attract visitors to our islands. These visitors will travel to support these events and programs while concurrently stimulating our state and local economies. As part of this program, HTA requires all its sports events and programs to include a community engagement and benefit component as part of their proposal.

In FY 2024, HTA maintained partnerships with prominent events, including the PGA Tour's Aloha Swing, LPGA LOTTE, Los Angeles Clippers, World Surf League, and the UH Athletics Branding Partnership, ensuring that each event benefits local communities through youth clinics, donations to schools, and other community initiatives.



| THE ALOHA SWING | |
|--|---|
| \$30,000 mill direct economic impact | \$10 mill + estimated value of all marketing assets received |
| \$1.5 million charitable donations | 12,000 visitors |

TECHNICAL ASSISTANCE AND CAPACITY BUILDING

In partnership with the Kilohana Collective, HTA conducted a comprehensive study exploring the needs and opportunities for businesses and community organizations involved in Hawai'i's visitor industry. The findings of the study, outlined in the "Turning the Tide" report, form the foundation for HTA's Foundational Technical Assistance (FTA) program and the Community Tourism Collaboratives (CTC) Program, both launched in 2024.

The FTA program offered workshops on island-specific tourism topics such as market

understanding, cultural program development, and marketing. These workshops held across the Kauai, Oahu, Maui, and Hawaii Island were designed to help businesses better align with sustainable and regenerative tourism practices.

The Stewardship CTC provided technical assistance and funding to support stewardship at sacred places and cultural sites. The Regenerative Tourism CTC helped to develop market-ready visitor activities that are deeply rooted in the principles of regenerative tourism.



TOURISM WORKFORCE DEVELOPMENT

In 2024, HTA made significant progress in addressing workforce development within the visitor industry. In line with HRS 201B-3(a)(22), HTA is focused on meeting the industry's evolving needs by collaborating with educational institutions to provide training opportunities for the workforce. This initiative aims to enhance overall skills and improve the quality of service.

Through the newly established Tourism Workforce Development Plan, HTA has identified strategies to foster the growth of a diverse and skilled tourism workforce.

HTA supported the LEI (Lead. Inspire. Expose.) Program, which provides high school and college students with opportunities to explore careers in the visitor industry. In partnership with ClimbHI, HTA also launched the HTA Work Wise program, offering seasonal and part-time employment opportunities for recent high school graduates.

Additionally, the second Hawai'i Tourism Ho'oilina Scholarship Program cohort graduated from the University of Hawai'i School of Travel Industry Management in Spring 2024. This program targets public high school seniors pursuing hospitality, tourism, and culinary arts careers and provides seven 4-year scholarships.

HTA also supported scholarships for aspiring chefs at Kapi'olani Community College's Culinary Institute of the Pacific (CIP). CIP partnered with the Culinary Institute of America (CIA) to develop a workforce development program that enables local chefs to further their education and skills and earn certificates from both these renowned institutions.

HTA is working to develop new curriculum for a Tour Guide Certification program to be completed at the end of December 2024.



920

high school and college students participated in LEI program

100

businesses



53

O'ahu and Maui high school students participated in HTA Work Wise Program

30

businesses



7

Hawai'i Tourism Ho'oilina Scholarship graduates from the University of Hawai'i School of Travel Industry Management



32

Scholarships provided to CIP/CIA Certificate Program

HAWAI‘I CONVENTION CENTER

Change is in the air at HCC. Described as “a tired old facility” by one outside tourism consultant, a sense of urgency has permeated HCC. Starting with a record-breaking revenue year, which resulted in a breakeven financial result for fiscal year 2024, to a very innovative roof remodeling project that will enhance the experience and revenues of HCC is in the works. HCC will no longer be a mere accommodation for the convention industry, but the center will organize more local events to benefit our community.

Volleyball, basketball, and pickleball are not the only changes in events you will see at HCC. Craft fairs, graduations, and entertainment events will fill our calendar to realize our state assets’ potential. As you pass through HCC, you will see many of the new renovations and exciting events that fill the center to better serve Hawai‘i’s people.

Examples of 2024 conventions at HCC include the Hawai‘i include Daito and Pokemon World Championships.



\$380.9 MILLION

Visitor Spending from offshore events

\$45.7 MILLION

Tax Revenue from offshore events

\$15.7 RETURN TO STATE

For every dollar invested

FINANCIAL HIGHLIGHTS

The HTA’s Fiscal Department comprises our Procurement, Budget, and Fiscal Departments. Simply put, our mission is to assist our creative partners at HTA in fulfilling their objectives by writing procurement contracts, ensuring that we have the funds to pay for those contracts, and monitoring and inspecting contracts from a budgetary and fiscal perspective to ensure they are fully executed. In addition to the internal functions of the department, we interface with our external government partners to fulfill the obligations of the state government.

Over the past year, we have been involved with two fiscal audits and a year-long performance audit by our Legislative State Auditor. This constant oversight has led to a more robust Fiscal Department that implements and constantly changes our procedures to accommodate the demands of our constituents.

With adequate staffing and funding, we plan to become a more substantial internal accounting and audit organization in the future to ensure that HTA provides the maximum value for taxpayers’ dollars.

FINANCIAL HIGHLIGHTS (CONT.)

HAWAI'I TOURISM AUTHORITY

Revenues

| | |
|--------------------------------|----------------------|
| Appropriation Transfer | 60,000,000.00 |
| Federal Drawdowns | - |
| Interest and Investment Income | <u>904,720.00</u> |
| Total Revenues | <u>60,904,720.00</u> |

Expenditures

| | |
|--------------------------------------|-------------------|
| Branding | 34,484,881.00 |
| Destination Management | 8,558,902.00 |
| Perpetuating Hawaiian Culture | 8,007,534.00 |
| Emergency Response | 4,615,998.00 |
| Sports | 2,613,500.00 |
| Salaries | 2,134,464.00 |
| Planning and Evaluation | 721,943.00 |
| Resident and Industry Communications | 530,340.00 |
| Safety and Security | 520,000.00 |
| Governance | 350,900.00 |
| Administration | 338,706.00 |
| Workforce | <u>172,480.00</u> |
| Total Expenditures | 63,049,648.00 |

HAWAI'I CONVENTION CENTER

OPERATING REVENUES

| | |
|-------------------|----------------------|
| Facility Expenses | 11,039,086.00 |
| Food and Beverage | <u>17,855,872.00</u> |
| TOTAL REVENUES | <u>28,894,958.00</u> |

OPERATING EXPENDITURES

| | |
|--------------------|---------------------|
| Facility Expenses | 16,712,399.00 |
| Food and Beverage | <u>9,624,383.00</u> |
| TOTAL EXPENDITURES | 26,336,782.00 |

NET INCOME (LOSS) FROM OPERATIONS 2,558,176.00

FIXED ASSET PURCHASES (214,728.00)

OPERATING NET INCOME 2,343,448.00

CONTRACTS OVER \$1 MILLION FOR THE LIFE OF THE CONTRACT

AEG Management HCC, LLC dba Hawai'i Convention Center – CON 14002: Hawai'i Convention Center

AviaReps – CON 20007: Korea MMA

Anthology Marketing Group, Inc. – CON 20010: Public Relations, Communications, and Outreach Services

The Walshe Group Pty Ltd dba Hawai'i Tourism Oceania – CON 21019: Oceania MMA

Hawai'i Community Foundation – CON 21033: HTA X HCF Implementation of Kūkulu Ola & Aloha 'Āina

Hawai'i Visitors and Convention Bureau – CON 21038: CEP DMAP Community & Hawaiian Culture Events

Department of Transportation, Airports Division – MOA 21039: Kāhea Program Airport Greetings

Hawai'i Visitors and Convention Bureau – CON 22003: Global MCI Marketing Services of the Hawaiian Islands

Hawai'i Visitors and Convention Bureau – CON 23003: U.S. MMA

A.LINK LLC – CON 23004: Japan MMA

CNHA – CON 23008: Support Services for Destination Stewardship

Department of Land and Natural Resources – CON 23013: Sub-Grantee Agreement from the American Rescue Plan Act State Travel, Tourism, and Outdoor Recreation Grants (State Tourism Grants)

VoX International – CON 23016: Canada MMA

Rider Levett Bucknall Ltd. – CON 24001: PMCM Service for HCC Rooftop

Emotive Travel Marketing Ltd – CON 24004: Europe MMA

Hawai'i Visitors & Convention Bureau – CON 24006: US Marketing Maui Recovery Plan

PGA Tour, Inc. – CON 24008: PGA TOUR 2024 Events (Sentry Tournament of Champions, The Sony Open, and the Mitsubishi Electric Championship)

Hawai'i Visitors and Convention Bureau – CON 24009: Island Destination Brand Management & Marketing Services

Hawai'i Visitors & Convention Bureau – CON 24017: U.S. Marketing Maui Recovery Plan 2

Hawai'i Visitors & Convention Bureau – CON 24018: Hawai'i Tourism Global Support Services for Brand Management & Marketing

PROCUREMENTS OVER \$100,000 IN FISCAL YEAR 2024

HVCB – CON 23003: US MMA

A.LINK LLC – CON 23004: Japan MMA

CNHA – CON 23008: Support Services for Destination Stewardship

VoX International – CON 23016: Canada MMA

Hawai'i Visitors and Convention Bureau – CON 24009: Island Destination Brand Management & Marketing Services

Better Destinations, LLC – CON 24010: HTA Governance Study

Allana Buick & Bers, Inc. – CON 24012: Professional Architectural/Engineering Services for Rooftop Repair Project at the Hawai'i Convention Center

Hawai'i Visitors & Convention Bureau – CON 24018: Hawai'i Tourism Global Support Services for Brand Management & Marketing

Hawai'i Visitors and Convention Bureau – CON 25014: U.S. Marketing Maui Recovery Plan 3

HTA STRATEGIC PLAN ASSOCIATED MEASURES - NATURAL RESOURCES PILLAR

| | 2023 | 2024 |
|--|--|--------------------|
| OBJECTIVE 1: Encourage and support sustainable and responsible tourism. | | |
| Increasing number of training sessions provided for visitor industry partners. | 7-on-line sessions 6 - modules on demand | Data Not Available |
| Increasing number of management level trainings. | 20 coaching sessions for individual companies | Data Not Available |
| OBJECTIVE 2: Engage and encourage active natural and cultural resource management strategies in areas frequented by visitors. | | |
| Maintained or increased funding by HTA to other agencies for improving and managing tourism impacted natural and cultural sites in proportion to overall budget. | TOTAL: \$7,240,000.00 DLNR - Various Projects \$7,200,000 (EDA Funds) UH: Traveling Educational and Outreach Programs to Reach a Wider Audience on Kaua'i - \$40,000.00 | Data Not Available |
| Identification of high impact areas by mobile location data tracking. | 710 | 740 |
| OBJECTIVE 3: Promote visitor industry alignment with the Aloha+ Challenge, Hawai'i's recognized model to achieve the United Nations Sustainable Development Goals, especially for energy and water. | | |
| Increased number of partners/organizations joining the Hawai'i Green Business (HGB) Program. | 40 | Data Not Available |
| Initiation of efforts to track sustainable efforts of the visitor industry, possibly in these key areas: | | |
| - Increased number of kilowatt hours saved | 1, 150,949 kWh | Data Not Available |
| - Reduced amount of water consumed | 11,013,118 kgal | Data Not Available |
| - Increased number of renewable energy installations | 2,617.01 (MTCO2e) | Data Not Available |
| - Reduced amount of petroleum used | 317,119.06 therms | Data Not Available |
| - Reduced amount of plastic waste | 37.42 tons | Data Not Available |

HTA STRATEGIC PLAN ASSOCIATED MEASURES - HAWAIIAN CULTURE PILLAR

| | 2023 | 2024 |
|---|---|---|
| OBJECTIVE 1: Support the everyday use of the Hawaiian language. | | |
| Maintained or increased proportion of total budget for HTA cultural programs each year, specifically those focused on 'ōlelo preservation or education. | <p>TOTAL: \$560,000</p> <p>Bishop Museum - CON20195 - He Aupuni Palapala, Phase III: Preserving & Digitizing the Hawaiian Language Newspapers - \$500,000.00</p> <p>Ma Ka Hana Ka 'Ike Building Program: Ma Ka Hana Ka 'Ōlelo Hawai'i - \$60,000.00</p> | TOTAL: \$0 |
| Increased annual number of visits and unique visitors to the Ma'ema'e toolkit on the HTA website. | 100 views | Data Not Available |
| OBJECTIVE 2: Ensure the accurate portrayal of Hawaiian culture by HTA's marketing contractors. | | |
| Establishment of criteria for cultural content of marketing materials. | Ma'ema'e Toolkit was updated on in March 2023. The Hawaiian Islands Brand Guidelines, as of the end of October has not been updated for 2023 | The Hawaiian Islands Brand Guidelines were updated. |
| Assurance, through annual marketing contractor performance review of marketing and promotional materials and activities, that these materials and activities meet the standards of the cultural and language content criteria. | Chief Brand Officer and Brand Team reviewed through 6-month process and used Ma'ema'e toolkit and Brand guidelines | Data Not Available |
| OBJECTIVE 3: Encourage accurate portrayal of Hawaiian culture in visitor industry marketing and experiences for visitors. | | |
| Sponsorship or co-sponsorship of a statewide conference bringing together industry decision makers, cultural practitioners active in the industry, and various Native Hawaiian cultural groups to review best practices in marketing and visitor experiences. | Ka Huina 2023 Hawai'i Tourism Conference | Ka Huina 2024; Hawai'i Tourism Conference 2024 |
| Publication of recommendations from the conference, along with participants' comments about the feasibility of carrying out the recommendations. | Feedback was captured and incorporated into annual updates to the Brand Guidelines and Ma'ema'e Toolkit. | Data Not Available |

HTA STRATEGIC PLAN ASSOCIATED MEASURES - HAWAIIAN CULTURE PILLAR (CONT.)

| OBJECTIVE 4: Increase understanding and respect for cultural practitioners, cultural sites, and cultural resources. | | |
|---|---|--|
| Establishment of a system for measuring and reporting the number of lodging industry entities with on-site cultural practice programs and practitioners, results to be tracked/reported annually. | No activity done | On June 4, 2024, the Native Hawaiian Hospitality Association (NaHHA) was awarded by the Hawaii Tourism Authority (HTA) to develop and maintain a statewide database. This database will include information on Native Hawaiian cultural practitioners, organizations, and visitor industry partners. NaHHA is expected to complete this project by the end of CY 2024. |
| Numerical results of a survey (at least once during the next five years) of HTA's cultural training program graduates to determine extent of their activities. | Data not available | Data not available |
| Development of a partnership with recognized Hawaiian cultural organizations to identify sites that are being used appropriately or inappropriately for touristic purposes. | Data not available | Data not available |
| OBJECTIVE 5: Provide the visitor industry with opportunities for Native Hawaiian cultural education and training for its workforce. | | |
| Establishment of a requirement in workforce cultural training contracts to assess and report on program effectiveness. | HTA did not establish a requirement in workforce cultural training contracts to assess and report on program effectiveness. HTA did offer voluntary Hawaiian Culture Training - 16 Trainings | No workforce cultural training contract in FY 2024 |
| Annual reporting data that indicate increased numbers of organizations offering products and services certified as meeting HTA standards. | See above. | See above. |

HTA STRATEGIC PLAN ASSOCIATED MEASURES - COMMUNITY PILLAR

| | 2023 | 2024 |
|---|---|------------------------|
| OBJECTIVE 1 (Community Enrichment): Generate and/or invest in initiatives and projects that provide for positive resident-visitor interaction, celebrate Hawai'i's multicultural heritage, and support better relations between communities and the tourism industry | | |
| Targeted attendee satisfaction is at least 85%. | Data not available | Data not available |
| Targeted percentages of attendees/participants are at least 25% residents and at least 25% visitors. | Data not available | Data not available |
| Number of new or improved projects funded. | TOTAL: 76 projects New Projects: 18; Established projects: 58 | Data not available |
| Improved Resident Sentiment Survey measure on "Tourism is good for me and my family." | Spring - 36% | Spring - 40% |
| OBJECTIVE 2 (Workforce Development): Help build a globally competitive visitor industry workforce with programs for residents starting from school age, to college students, and to those already in the visitor industry. | | |
| Successful initiation of a schedule bringing together industry and education partners in a workforce committee to meet at least twice a year, beginning in the second half of 2020. | No Committee Stood Up. | No Committee Stood Up. |
| HTA invests in at least three new programs as a result of the workforce committee. | N/A | N/A |
| OBJECTIVE 3 (Communications): Generate effective messages to enhance residents' understanding of how Hawai'i tourism helps perpetuate Hawaiian culture, preserve the environment, and support communities. | | |
| Growing reach and engagement on all HTA social media platforms. | Data not available | Data not available |
| Increased numbers of news stories about HTA-sponsored events and programs. | Data not available | Data not available |

HTA STRATEGIC PLAN ASSOCIATED MEASURES - COMMUNITY PILLAR (CONT.)

| OBJECTIVE 4 (Safety & Security): Support education and prevention programs to improve safety among visitors and residents and to maintain Hawai'i's reputation as a safe destination. | | |
|--|---|---------------------------------|
| Improved visitor awareness of ocean and hiking safety information, as measured by increase in the percentage of surveyed visitors that recall seeing or hearing a safety-related video or message. | <p>Recall seeing Ocean and Hiking Safety - Pre-arrival U.S. West -19.1%; U.S. East - 18.5%; Japan - 29.7%; Canada -17.0%; Oceania -17.4%; China - 17.3%; Korea - 29.8%</p> <p>Recall seeing Ocean and Hiking Safety - During trip U.S. West - 12.9%; U.S. East - 14.1%; Japan - 10.5%; Canada - 13.5%; Oceania - 12.2%; China - 19.7%; Korea - 19.0%</p> <p>Recall seeing Ocean and Hiking Safety - Both Pre and During trip U.S. West - 16.4%; U.S. East - 17.2%; Japan - 33.4%; Canada -13.7%; Oceania - 9.1%; China - 17.7%; Korea - 10.6%</p> | Data not available. |
| Annual Marketing Effectiveness Study (MES) results for selecting Hawai'i as "It is a safe and secure place" and reason to return to Hawai'i as "It is safe." | Contract for MES ended in 2022. | Contract for MES ended in 2022. |
| Annual Visitor Satisfaction Survey (VSAT) results for item "Based on your most recent trip to Hawai'i, how would you rate the state of Hawai'i on being a safe and secure destination?" | <p><u>"Excellent" rating of "it is a safe and secure place."</u></p> <p>US West - 82.5% US East - 84.9% Japan - 58.5% Canada - 87.0% Oceania - 84.6% China - 80.3% Korea - 72.4%</p> | Data not available. |

HTA STRATEGIC PLAN ASSOCIATED MEASURES - COMMUNITY PILLAR (CONT.)

| | | |
|--|--|--------------------|
| OBJECTIVE 5 (Safety & Security): Actively participate in Hawai'i Emergency Management Agency's (HI-EMA's) preparedness exercises and serve as a communications link to assist Hawai'i's visitor industry and visitors during times of crisis. | | |
| Number of channels/tools available (and if needed, used) to inform and educate visitor industry businesses and visitors about various foreseeable types of emergencies. | Data not available | Data not available |
| Maintained or improved exercise measurements as established by HI-EMA. | Data not available | Data not available |
| OBJECTIVE 6 (Mitigation): Identify, mitigate, and address key issues threatening community support for tourism and the integrity of Hawai'i's tourism industry by working with public agencies and private organizations. | | |
| Number of issues identified by island. | Hotspots identified on each island via the DMAP - priority: Kaua'i: 1 O'ahu: 4 Maui: 5 Hawai'i Island: 5 Moloka'i: 0 Lāna'i: 0 | Data not available |
| Number of issues addressed via stakeholder meetings by island. | Kaua'i: 1 O'ahu: 2 Maui: 5 Hawai'i Island: 7 Moloka'i: 0 Lāna'i: 0 | Data not available |
| OBJECTIVE 7 (Sports): Support sports programs that create community engagement, have marketing value, provide economic benefits, support Hawai'i's youth, and are aligned with Hawai'i's brand. | | |
| Economic impact from high-profile sporting events. | \$132,000,000+ | Data not available |
| Number of communities reached/served through the sports programs. | Communities across all islands were reached through one or more high-profile events supported by HTA. | Data not available |
| Number of youth participation through the sports programs. | 11,000+ | Data not available |

HTA STRATEGIC PLAN ASSOCIATED MEASURES - BRAND MARKETING PILLAR

| | 2023 | 2024 |
|---|---|---|
| OBJECTIVE 1: Ensure that Hawai'i's brand image is globally aligned and consistent with marketing principles of authenticity, uniqueness, and Responsible Tourism. | | |
| Prospective visitors surveyed in the Marketing Effectiveness Survey (MES) who were aware of Hawai'i marketing materials but had never been to Hawai'i scoring statistically higher in perceptions of uniqueness of the destination than those who were unaware. | No longer doing MES. Using SMARI. | No longer doing MES. Using SMARI. |
| SMARI -Communications ratings - 1) Deepen my understanding that Hawai'i is a place that cares about its nature and culture | USA: 4.42 Japan: 4.20 | USA Jan-Jun: 4.45 Japan Jan-Jun: 4.15 |
| SMARI -Communications ratings - 2) Deepen my understanding that Hawai'i is a place that cares about its community and residents | USA: 4.39 Japan: 3.91 | USA Jan-Jun: 4.38 Japan Jan-Jun: 3.89 |
| SMARI -Communications ratings - 3) Deepen my understanding that Hawai'i is a place that cares about visitor safety and informs about responsible travel. | USA: 4.26 Japan: 3.82 | USA Jan-Jun: 4.33 Japan Jan-Jun: 3.84 |
| Assurance, through annual contractor performance review and HTA oversight checklists, that marketing materials in each major market area have consistent branding, are aligned with core values, and are appropriately adapted for nuances in each market. | The Hawaiian Islands brand and values were carefully monitored and its integrity maintained through consistent review of marketing materials using the Hawaiian Island Brand Guidelines and Ma'ema'e Toolkit. The latter was updated this year. | The GMT brand content guidelines have been developed in May 2024 to better help the GMT to meet basic brand needs before it gets to Brand Managers at HTA. The Hawaiian Islands brand and values continued to be carefully monitored, and its integrity maintained through consistent review of marketing materials using the Hawaiian Islands Brand Guidelines and Ma'ema'e Toolkit. |

HTA STRATEGIC PLAN ASSOCIATED MEASURES - BRAND MARKETING PILLAR (CONT.)

| OBJECTIVE 2: Ensure marketing is focused on higher-spending, lower-impact market segments in each market area. | | |
|--|--|--|
| Development of an expanded target list of higher spending, lower-impact market segments by each Global Marketing Contractor. | Target: High-spending, positive-impact/giving back; mindful travel; life-time value | Target: High-spending, positive-impact/regenerative; mindful travel; life-time value |
| Increased percentages of the marketing budget devoted to high-spending market segments, along with increased MCI arrivals. | <p>Within each market, 100% of the budget devoted to target high-spending market segments.</p> <p>MCI Budget: \$4,700,000 + \$600,000 for US Marketing Maui Recovery Program 1 = \$5,300,000 MCI Arrivals: 401,207</p> | <p>Within each market, 100% of the budget devoted to target high-spending market segments.</p> <p>MCI Budget: \$5,350,000 (\$5,200,000 with 10% reduction for remainder CY24) MCI Arrivals (Jan-Sept): 191,137</p> |
| Annual results of a new Visitor Satisfaction survey question asking if visitors recall hearing or seeing information about safe and responsible travel (Pre-Arrival) | <p>Q4 2023 (%):</p> <p>US West: 19.8 US East: 16.8 Japan: 30.2 Canada: 17.3 Oceania: 17.5 China: 14.5 Korea: 29.7</p> | <p>Q2 2024 (%):</p> <p>US West: 17.6 US East: 13.2 Japan: 26.6 Canada: 18.9 Oceania: 17.8 China: 26.5 Korea: 25.1 Europe: 17.3</p> |
| OBJECTIVE 3: Maintain or improve the strength of Hawai'i's brand relative to its competitors. | | |
| Improved Hawai'i's ratings in the MES for "value" and "unique experiences." | No longer doing MES. Using SMARI. | No longer doing MES. Using SMARI. |
| Improved Hawai'i's rating in SMARI study - Image Lift for "value for the money" between Aware & Unaware of Campaign | USA Q4: +0.4 Japan Q4: +0.28 | USA Jan-Jun: +0.55 Japan Jan-Jun: +0.32 |
| Improved Hawai'i's rating in SMARI study - Image Lift for "unique" between Aware & Unaware of Campaign | USA Q4: n/a (this attribute wasn't included in 2023 study) Japan Q4: +0.37 | USA Jan-Jun: +0.07 Japan Jan-Jun: +0.37 |



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