



Legislative Briefing to the
House Tourism, Culture &
International Affairs Committee
and
Senate Tourism Committee

January 30, 2009

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Agenda

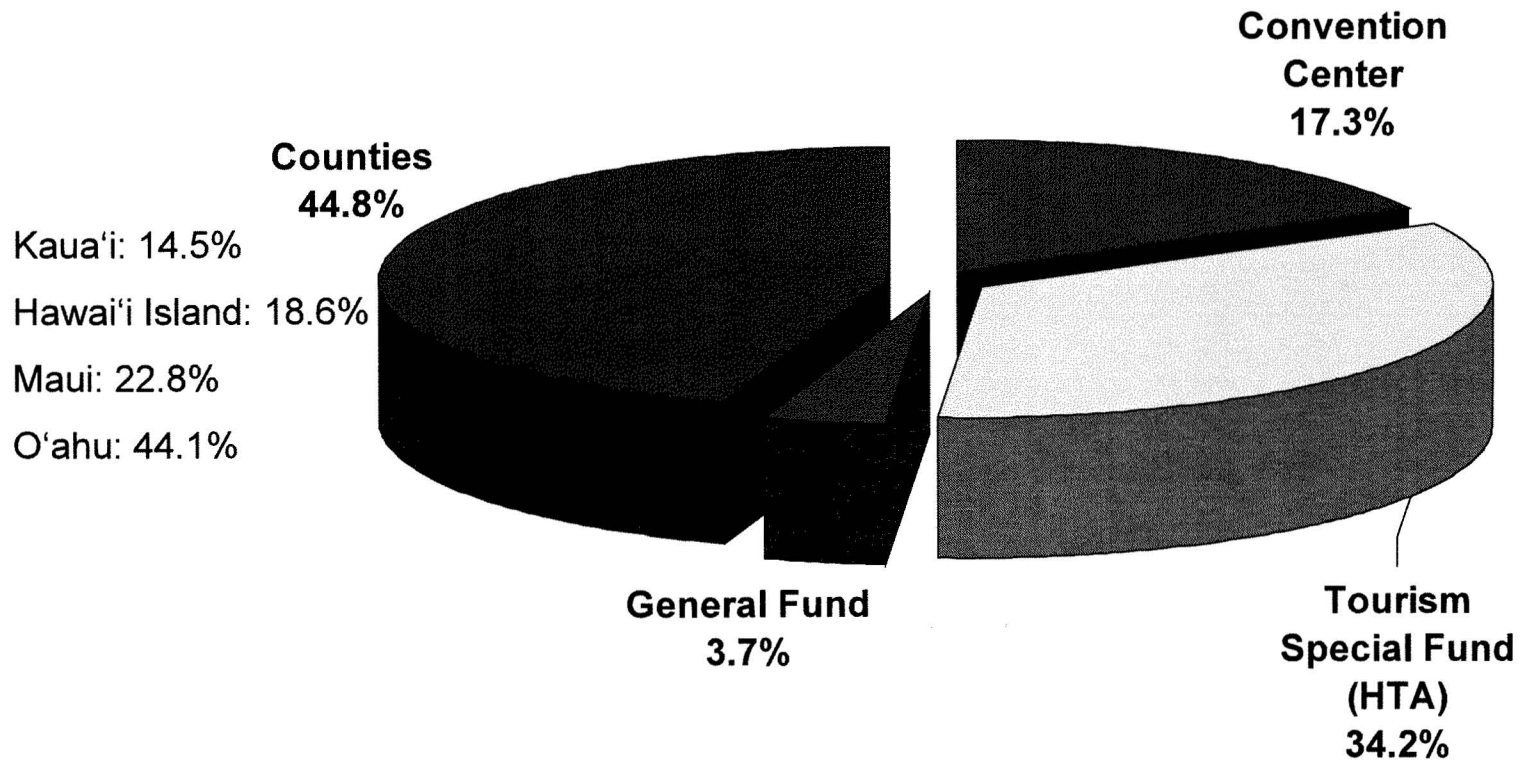
- HTA Overview
- Hawai'i Tourism Strategic Plan (TSP)
- Hawai'i Visitor Industry and Marketing
- Market Updates – Leisure and Business
- Wrap up



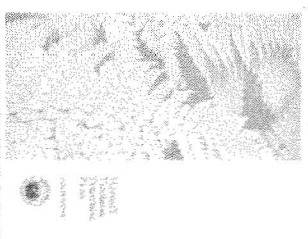
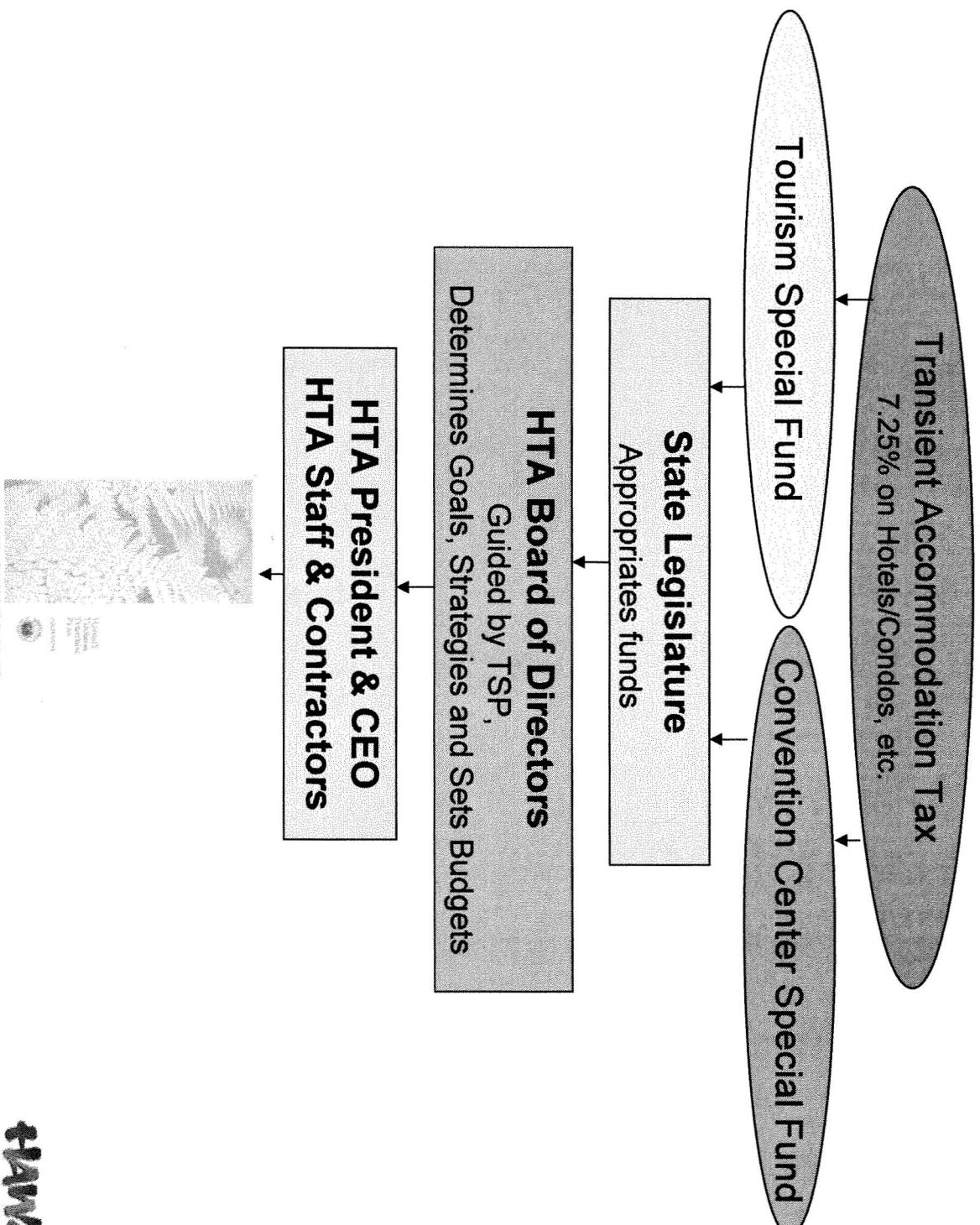
ACT 156, SLH 1998

- **Government Agency**
 - Established in 1998
 - Responsible for tourism policy and direction from statewide perspective
 - Tourism Special Fund derived from hotel room tax collections called *transient accommodations tax (TAT)*

TAT Distribution and Funding Source



HOW HTA WORKS





Major Components

- **Vision**
 - What stakeholders want industry to look like in 2015
- **Guiding Principles and Values**
 - Key areas of focus in developing the plan
- **Performance Indicators**
 - Ways to measure progress
- **9 Key Initiatives**
 - Goals, objectives, lead and support parties, and measures

rb1

Vision Statement

By 2015, tourism in Hawai'i will:

- honor Hawai'i's people and heritage;
- value and perpetuate Hawai'i's natural and cultural resources;
- engender mutual respect among all stakeholders;
- support a vital and sustainable economy; and
- provide a unique, memorable and enriching visitor experience.

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Measures of Success

- Resident Sentiment Surveys
- State and County Tax Receipts
- Visitor Spending
- Visitor Satisfaction



Strategic Initiatives

- Access
- Communications and Outreach
- Hawaiian Culture
- Marketing
- Natural Resources
- Research and Planning
- Safety and Security
- Tourism Product Development
- Workforce Development

HTA FY 2009 Budget

1/22/09

Strategic Initiative	Budget
Access	\$ 4,500,000
Communications & Outreach	1,120,000
Hawaiian Culture	1,425,000
Marketing	53,797,000
Natural Resources	2,000,000
Research & Planning	1,598,000
Safety & Security	575,000
Tourism Product Development	2,725,000
Workforce Development	250,000
Administrative	2,635,000
Reserve	425,000
Total	\$71,000,000

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Management & Financial Audit of HTA's Major Contractors

- Background of audit
- Auditor Findings
- HTA's response



HTA Marketing

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Leisure Marketing Contractors

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TOURISM AUTHORITY

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Hawaii Tourism Japan Hawaii Tourism Asia

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Hawaii Tourism Oceania

HAWAII
Hawaii Tourism Europe

KAUAI
HAWAII'S ISLAND OF DISCOVERY

The Island of
Oahu
The Heart of Hawaii

MAUI
The Magic Isles.
MAUI • MOLOKAI • LANAI

Hawaii's
Big Island
Aloha Spoken Here

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Business Marketing Contractors

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TOURISM AUTHORITY



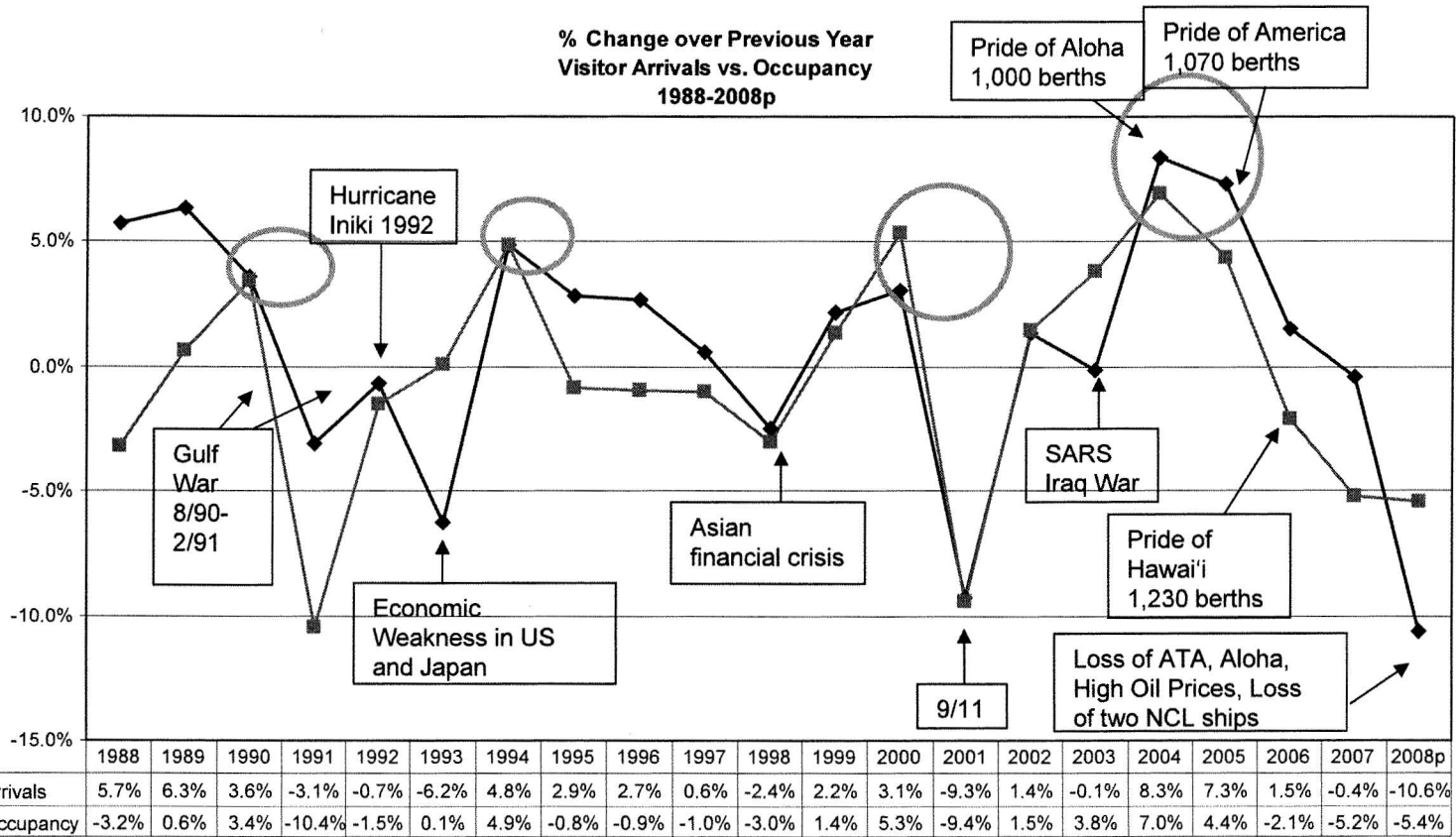
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WHERE BUSINESS AND ALOHA MEET.™
SMG

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**% Change over Previous Year
Visitor Arrivals vs. Occupancy
1988-2008p**





Uncontrollables

- Economic Variables (mortgage crisis, stock market, international economies, fuel prices)
- Fuel Surcharge
- Airlift
- Fuel Cost
- Competitive Product Offerings
- Time value
- Adoption of a staycation
- Changing Workforce
- Refreshing our destination
- Maturing Destination
- Foreign Currency Strength

Visitor Arrivals & Expenditures

Y-T-D 2008	Visitor Arrivals		Per Person Per Day Spending (\$)		Total Expenditures (\$ mil.)		Average Length of Stay		Visitor Days	
	2008e	% Chge	2008e	% Chge	2008e	% Chge	2008e	% Chge	2008e	% Chge
Total	6,699,424	-10.6%	\$180.2	-1.0%	\$11,335.9	-9.9%	9.4	1.8%	62,905,608	-9.0%
U.S. West	2,768,923	-14.7%	\$149.7	-4.0%	\$3,987.9	-16.2%	9.6	2.3%	26,645,868	-12.7%
U.S. East	1,682,673	-11.5%	\$182.1	-5.5%	\$3,202.5	-15.2%	10.5	1.4%	17,588,739	-10.2%
Japan	1,160,732	-10.5%	\$288.4	7.3%	\$1,920.8	-3.1%	5.7	0.9%	6,661,137	-9.7%
Canada	344,457	3.3%	\$151.6	0.5%	\$671.1	5.8%	12.9	1.9%	4,428,127	5.3%
All Others	742,639	3.0%	\$204.9	6.7%	\$1,553.7	9.0%	10.2	-0.9%	7,581,737	2.1%

Source: DBEDT
YTD December 2008 Visitors By Air

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Market Indicators/Gauges

- Arrivals
- Average Per Person Per Day Spending
- Length of Stay
- Total Expenditure
- Average Daily Rates
- Occupancy



Hotel Stats – YTD Average Daily Rate

	2008	2007	Percentage Pt. Change
State	\$200.77	\$197.91	+1.45%
O'ahu	\$169.84	\$166.87	+1.78%
Maui	\$266.57	\$258.88	+2.97%
Hawai'i	\$200.90	\$199.05	+0.93%
Kaua'i	\$206.10	\$204.35	+0.86%

YTD November

Source: Smith Travel Research

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Hotel Stats – YTD Occupancy

	2008	2007	Percentage Pt. Change
State	71.3%	75.4%	-4.1%
O'ahu	75.5%	77.1%	-1.6%
Maui	68.9%	75.9%	-7.0%
Hawai'i	60.9%	68.1%	-7.2%
Kaua'i	72.0%	76.6%	-4.6%

YTD November

Source: Smith Travel Research

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Market Indicators/Gauges

- Arrivals
- Average Per Person Per Day Spending
- Length of Stay
- Total Expenditure
- Average Daily Rates
- Occupancy
- Cost Per Arrival



Investment to Arrival

	2005	2006	2007	2008e
North America	\$ 2.40	\$ 2.35	\$ 2.51	\$ 3.24
Japan	\$ 4.99	\$ 5.93	\$ 6.55	\$ 7.39
Other Asia	\$ 9.30	\$ 9.80	\$ 10.49	\$ 15.38
Oceania	\$ 5.17	\$ 6.61	\$ 6.60	\$ 7.47
Europe	\$ 7.93	\$ 8.83	\$ 8.71	\$ 8.62
Latin America	\$ 1.23	\$ 0.95	\$ 0.90	\$ 0.95

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Market Indicators/Gauges

- Arrivals
- Average Per Person Per Day Spending
- Length of Stay
- Total Expenditure
- Average Daily Rates
- Occupancy
- Cost Per Arrival
- Industry forecast, booking pace
- Load factors
- Seat inventory

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2009 Q1 through Q3 Scheduled Nonstop Seats to Hawai'i (Statewide)

	FIRST QUARTER			SECOND QUARTER			THIRD QUARTER			YTD THROUGH 3RD QTR		
	2009	2008	%Chge	2009	2008	%Chge	2009	2008	%Chge	2009	2008	%Chge
Total US	1,446,732	1,849,975	-21.8%	1,539,818	1,570,262	-1.9%	1,589,311	1,650,633	-3.7%	4,575,861	5,070,870	-9.8%
US West	1,254,119	1,586,083	-20.9%	1,328,509	1,307,312	1.6%	1,368,058	1,395,713	-2.0%	3,950,686	4,289,108	-7.9%
US East	192,613	263,892	-27.0%	211,309	262,950	-19.6%	221,253	254,920	-13.2%	625,175	781,762	-20.0%
Total International	619,857	654,408	-5.3%	592,906	607,663	-2.4%	582,552	613,076	-5.0%	1,795,315	1,875,147	-4.3%
Canada	91,698	104,595	-12.3%	49,106	60,234	-18.5%	29,000	41,318	-29.8%	169,804	206,147	-17.6%
Japan	386,566	417,189	-7.3%	404,365	401,773	0.6%	408,898	418,596	-2.3%	1,199,829	1,237,558	-3.0%
Other Asia	36,082	34,371	5.0%	33,969	34,099	-0.4%	34,264	33,196	3.2%	104,315	101,666	2.6%
Australia/New Zealand	41,654	43,928	-5.2%	41,184	47,853	-13.9%	44,962	50,742	-11.4%	127,800	142,523	-10.3%
Other	63,857	54,325	17.5%	64,282	63,704	0.9%	65,428	69,224	-5.5%	193,567	187,253	3.4%
TOTAL	2,066,589	2,504,383	-17.5%	2,132,724	2,177,925	-2.1%	2,171,863	2,263,709	-4.1%	6,371,176	6,946,017	-8.3%

Source: Sabre ADI database data as of January 15, 2009



HTA's Marketing Contractors' Measurements of Success

- Marketing Effectiveness Study
- Access – Return on Investment
- Advertising Value Equivalency



Marketing Effectiveness Study

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Future Travel Intentions are Steady

Total Long Distance Travelers - US East	2006	2007	2008 Q1	2008 Q2	2008 Q3
Consider Hawai'i	18%	18%	21%	16%	19%
Likely to Visit (next 2 years)	20%	17%	18%	16%	18%
Total Long Distance Travelers - US West	2006	2007	2008 Q1	2008 Q2	2008 Q3
Consider Hawai'i	37%	36%	38%	36%	35%
Likely to Visit (next 2 years)	43%	39%	37%	37%	41%
Total Long Distance Travelers - Japan	2006	2007	2008 Q1	2008 Q2	2008 Q3
Consider Hawai'i	39%	38%	38%	39%	32%
Likely to Visit (next 2 years)	35%	31%	33%	32%	26%

Source: TNS

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What's Important to US Long-Distance Travelers?

Eastern US Market (Attributes Rated 3.4+):

- Safe/Secure (4.42)
- Good Value for the Money (4.29)
- Clean Environment (4.19)
- Great Place to Get Away From It All (4.19)
- Local People Are Friendly (4.12)
- Easy to Get Around (4.10)
- Variety of Types/Prices of Accommodations (3.94)
- Variety of Unique Activities & Experiences (3.93)
- Easy to Get There (3.90)
- Always More to Keep Coming Back (3.87)
- Variety of Cuisine/Dining Options (3.83)
- Different Experience Than Other Places (3.81)
- Unique Scenery Unlike Anywhere Else (3.80)
- Always New Experiences for the Visitor (3.75)
- Intriguing History and Culture (3.74)
- Opportunities for New Discoveries (3.73)
- Variety of Cultural Activities (3.58)
- Wide Variety of Recreational Choices (3.55)

Western US Market (Same Top Attributes As East):

- Safe/Secure (4.31)
- Good Value for the Money (4.24)
- Great Place to Get Away From It All (4.09)
- Local People Are Friendly (4.07)
- Clean Environment (4.06)
- Easy to Get Around (4.03)
- Variety of Unique Activities & Experiences (3.92)
- Variety of Types/Prices of Accommodations (3.89)
- Different Experience Than Other Places (3.87)
- Unique Scenery Unlike Anywhere Else (3.87)
- Always More to Keep Coming Back (3.85)
- Intriguing History and Culture (3.80)
- Easy to Get There (3.78)
- Variety of Cuisine/Dining Options (3.77)
- Opportunities for New Discoveries (3.74)
- Always New Experiences For the Visitor (3.69)
- Variety of Cultural Activities (3.57)
- Wide Variety of Recreational Choices (3.44)

Japanese Market (Attributes Rated 3.4+):

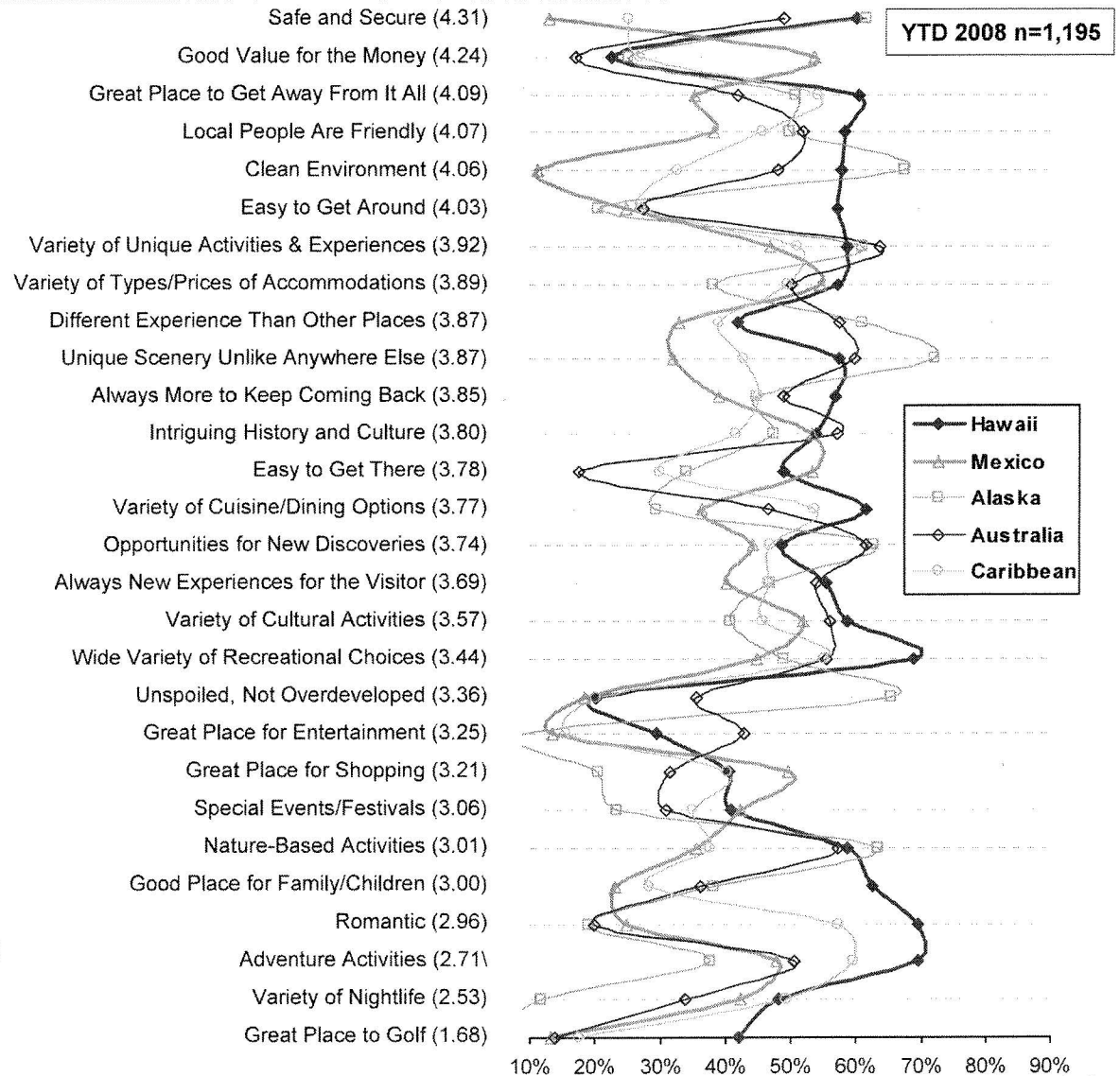
- Safe/Secure (4.41)
- Good Value for the Money (4.27)
- Always More to Keep Coming Back (4.19)
- Great Place to Get Away From It All (4.18)
- Unique Scenery Unlike Anywhere Else (4.16)
- Intriguing History and Culture (4.08)
- Variety of Unique Activities & Experiences (4.00)
- Different Experience Than Other Places (3.99)
- Clean Environment (3.98)
- Opportunities for New Discoveries (3.92)
- Variety of Types/Prices of Accommodations (3.88)
- Local People Are Friendly (3.84)
- Easy to Get Around (3.83)
- Variety of Cuisine/Dining Options (3.66)
- Easy to Get There (3.64)
- Unspoiled, Not Overdeveloped (3.58)
- Always New Experiences For the Visitor (3.47)
- Many Things To Do For Active Lifestyles (3.44)
- Good Place for Family/Children (3.41)

Prefer Hawaii by YTD (Q5)

Western Market

Competitively, each of these destinations have strengths and opportunities. Hawaii's position on each attribute is shown more clearly on the following two charts.

Prefer Destination (% for Each Attribute)
Ranked by Average Importance (2007 YTD) for Western Market Noted in Labels



Q5. For each attribute listed below, please select the destination(s) you prefer, whether you have been to the destination or not. (Hawaii, Alaska, Caribbean, Australia, Mexico, or None). Base noted in legend

HTJ Co-op: Hula Week 2008



Co-op Partner: Japan Airlines

Dates: June 20 – July 20, 2008 & November 2008 (2-stage program)

Background: With approximately 400,000 hula enthusiasts in Japan, there is a large market to target and promote Hawai'i's authentic hula events and resources.

Program: Three components

- 1) Watch – Invitation to traditional hula events.
- 2) Touch & Feel – Participate in cultural programs including hula workshops, ipu making workshops, etc.
- 3) Dance – Nightly Ho'olaule'a performances at Waikīkī Beach Walk.

Cost: \$145,550 (HTA) and \$480,000 (JAL) = \$625,550

Target: Approximately 4,000 hula enthusiasts from Japan during each stage

Outcome: Attendance - 10,253 bookings

Media Coverage (Stage 1) – 6 major features with a total ad value of \$668,335. Additional coverage in 40 media outlets including websites, newspapers, magazines, TV and radio programs.

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Advertising Value Equivalency North America

Total 2008 AVE: \$80,597,850

(includes HVCB firm wide generated – produced – and non-generated clips for 2008)



Los Angeles Times Business

Hawaii hotels offer up good deals
Stimulus on airfare and flights can lead to better deals, but flexibility and early cancellation are important.

HERE FOR YOUR MONEY
Hawaii hotels offer up good deals
 Stimulus on airfare and flights can lead to better deals, but flexibility and early cancellation are important.

75% off Hotel Deals
 Some up to 75% on hotel stays. Best price & return guarantee.

Hotel Flight Deals
 Stimulus on airfare and flights can lead to better deals, but flexibility and early cancellation are important.

Hotel Flight Deals
 Stimulus on airfare and flights can lead to better deals, but flexibility and early cancellation are important.

**Los Angeles Times:
"Hawaii hotels offer up good deals"**

Circ.: 1,055,076

**Impressions:
2,004,644**

AVE: \$7,519

Oahu

hawaiian harmonies

Hemispheres Magazine: Three Perfect Days Oahu & Hawaiian Harmonies

Circ.: 399,333

Impressions: 758,733

AVE: \$21,869

Hemispheres Magazine: Three Perfect Days Oahu & Hawaiian Harmonies

Circ.: 399,333

Impressions: 758,733

AVE: \$21,869

THE WALL STREET JOURNAL TRAVEL

In Hawaii, Paradise Goes on Sale

Reserved hotels, airlines post lowest deals, there's hardly anybody else

Articles | **Subscribe** | **Destinations**

BY DANIELA JACOBSON

HAWAII — On a warm night in the tropical paradise of the Hawaiian Islands, the sun is low on the horizon, and the air is thick with the scent of tropical flowers. The island is quiet, and the only sound is the gentle lapping of waves against the shore. It's a perfect scene, and it's exactly what you need to escape the stress of the city and enjoy the beauty of nature.

Wall Street Journal.com: In Hawaii, Paradise Goes on Sale

Circ.: 4,059,093 (Publication appeared in print and online. AVE could only be found for online portion for this quick turnaround.)

AVE: \$4,540

New York Times - Early

Season's Greetings

With the holiday season upon us, it's time to start thinking about the perfect gift. Whether you're looking for a unique, handmade item or a classic, timeless piece, there's something for everyone. The holiday season is a time of joy and celebration, and it's a great opportunity to show your love for the ones you care about.

New York Times: Season's Greetings

Circ.: 1,037,828

AVE: \$52,093

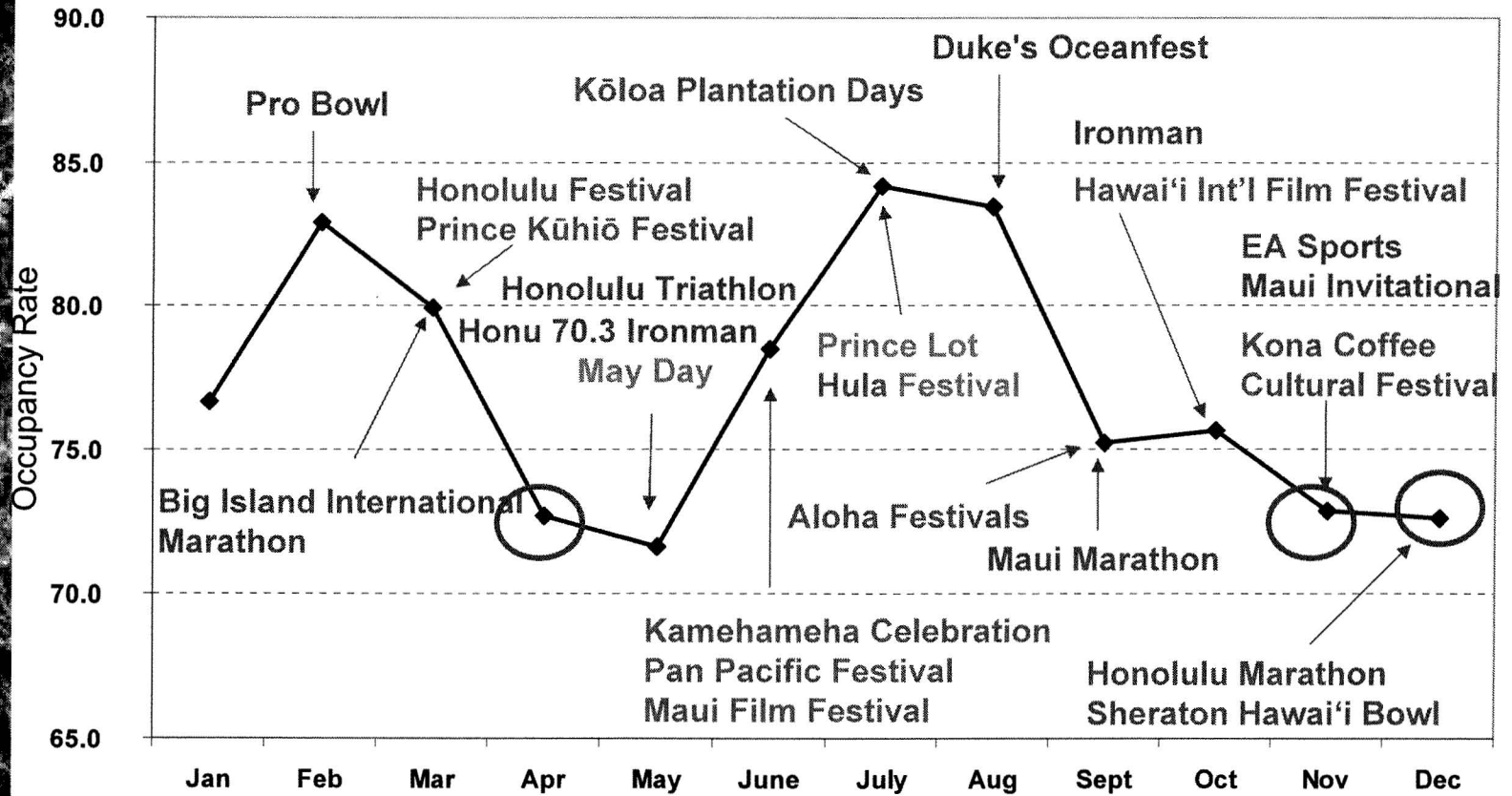
New York Times: Season's Greetings

Circ.: 1,037,828

AVE: \$52,093



Shoulder Period Opportunities



○ Opportunities for New Events

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Our Target: High Yielding vs. Mass Tourism

- Mass Tourism - covers low end packages, student group travel and the like
- High Yielding Tourism - consumer buying in for a mid to high end experience tendency to want to be exposed to a variety of experiences, will tend to stay longer and venture to more than one island
- Luxury Tourism - Investment made on their accommodations based on overall experience within that resort with a select few items outside of the resort

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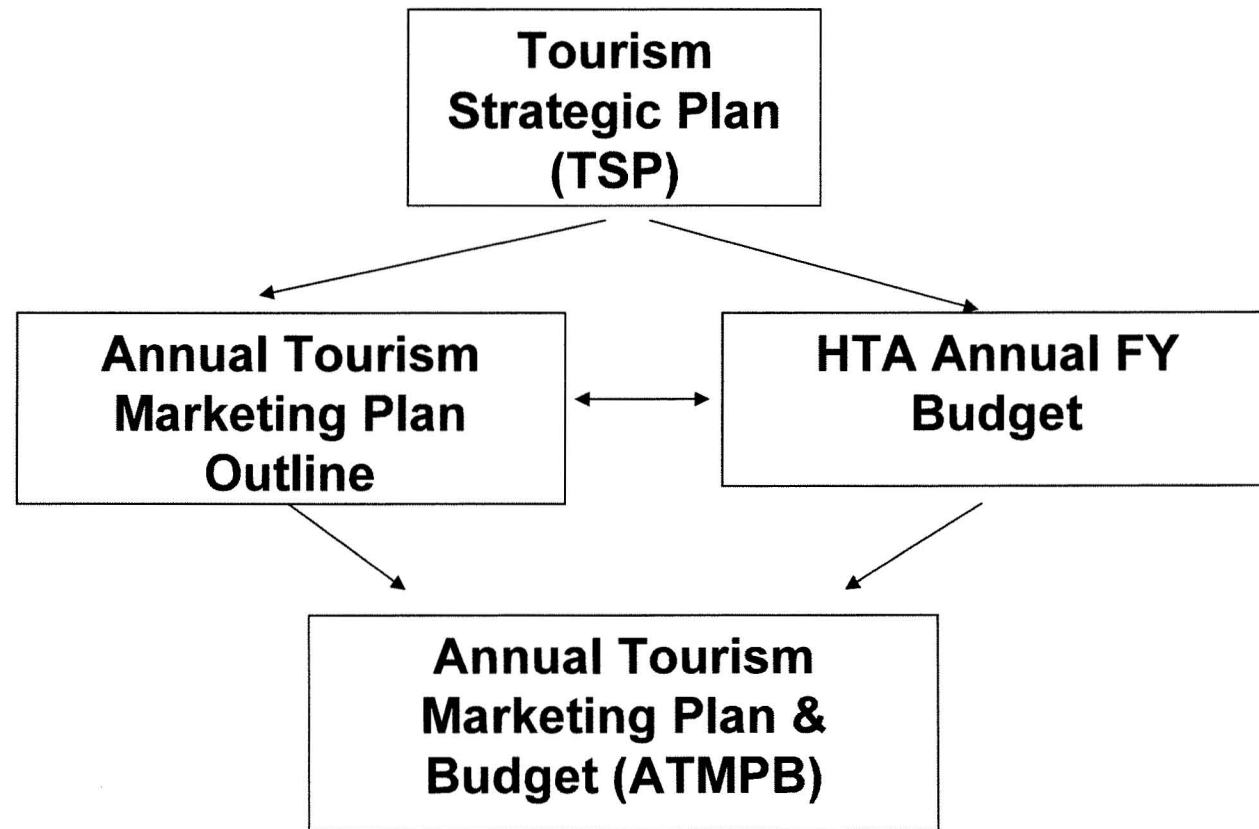


Destination Marketing vs. Industry Marketing

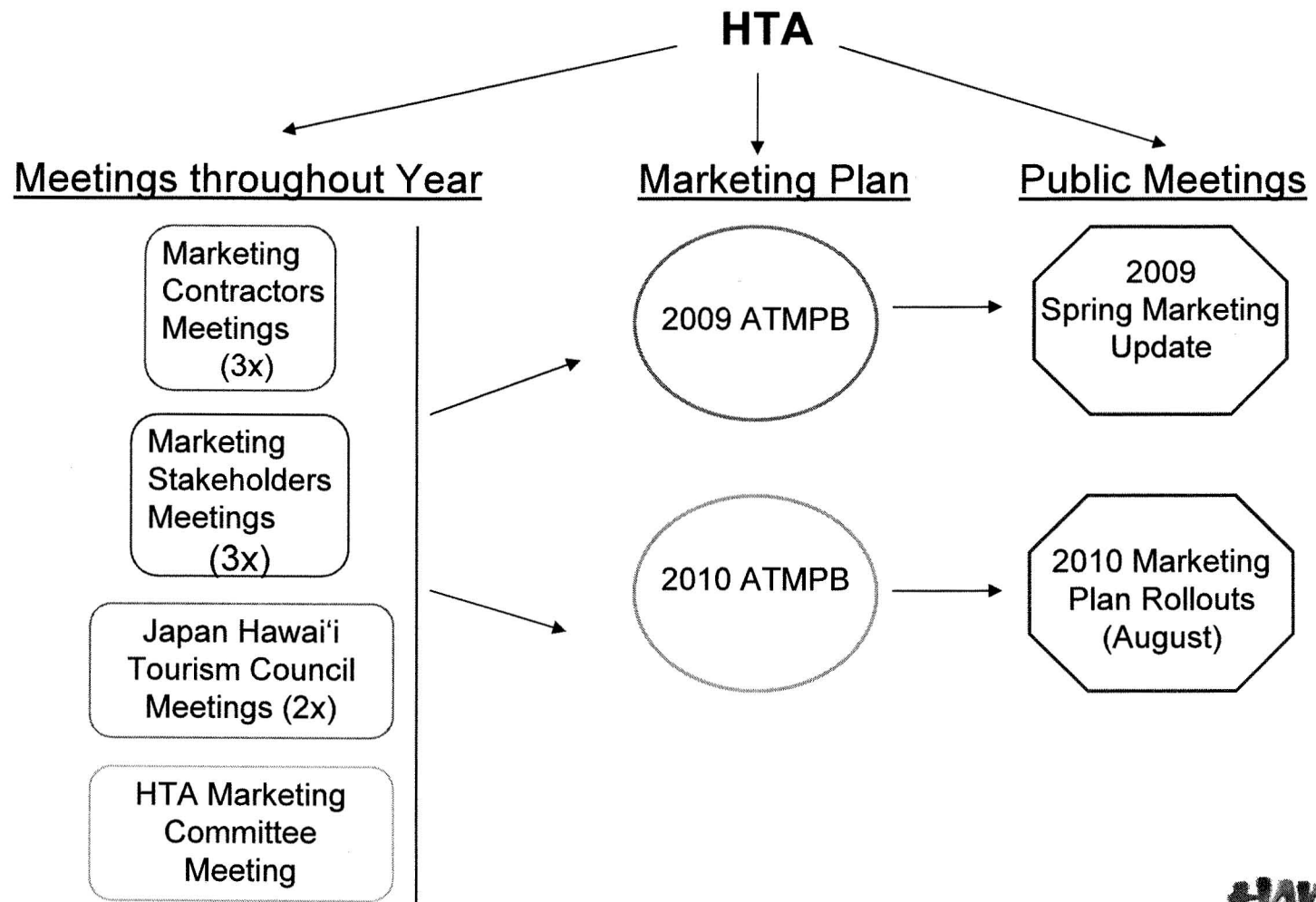
- **Destination marketing** responsibilities are focused on positioning the destination image and allure, and ensures that the key attributes of the destination are aligned with the target audience that potential visitors value!
- **Industry** shares this responsibility as well placing further emphasis on their product and its features and values lending them to the conversion.
- Both set the stage for demand for the destination and its experience as well as the product offering.

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Marketing Planning Process



Development & Monitoring of the Annual Tourism Marketing Plan



Marketing Efforts

2008 Base	2008								2009			Subtotals
	Jan-May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	
Sports Events						LPGA Vans Maui Invtl	PGA Triple	SHB Skins Marathon Hualalai	Mercedes Sony	SBS Pro Bowl	HNL Fest	
HVCB \$24.9M		Emergency \$3M (FY08) \$2M (FY08)		Fall 2008 Access \$1M (FY09) \$3M (FY09)		Supplemental \$1.5M (FY09) \$1.6M (FY09) \$1.4M (FY09)			Winter/Spring 2009 \$2M (FY09) \$2M (FY09)			HTA: \$ 7,500,000 Industry: \$ 8,600,000 Other: \$ 1,400,000 TOT: \$17,500,000
HTJ \$7.8M				Fall 2008 Access \$370K (FY09) \$1.66M (FY09)								HTA: \$ 370,000 Industry: \$ 1,660,000 TOT: \$ 2,030,000
HTAsia \$1.1M				Fall 2008 Access \$175K (FY09) \$1.063M (FY09)								HTA: \$ 175,000 Industry: \$1,063,000 TOT: \$1,238,000
HTO \$.900M				Fall 2008 Access \$105K (FY09) \$250K (FY09)								HTA: \$ 105,000 Industry: \$ 250,000 TOT: \$ 355,000
HTE \$.883M				Fall 2008 Access \$115K (FY09) \$350K (FY09)								HTA: \$ 115,000 Industry: \$ 350,000 TOT: \$ 465,000
SMG \$6.5M												

HTA Contributions
Industry Contributions
Other (HVCB) Contributions

TOTALS
HTA: \$ 8,265,000
Industry: \$ 11,923,000
Other: \$ 1,400,000
TOT: \$21,588,000

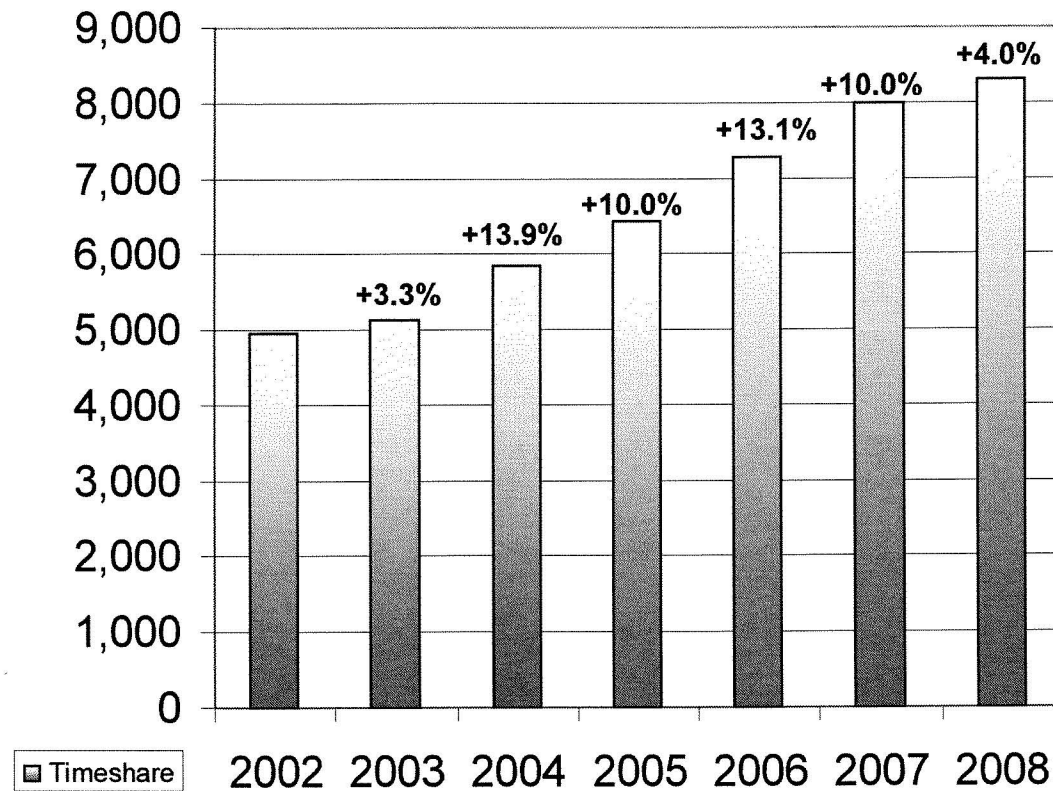




Timeshare/Vacation Ownership

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Timeshare Inventory & Growth



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Timeshare vs. Hotel Occupancy Rates

	Q2 2008		Q3 2008	
	Timeshare	Hotel	Timeshare	Hotel
Statewide	88.6%	68.9%	91.9%	70.6 %
O'ahu	94.4%	72.9%	91.0%	77.2 %
Maui	84.7%	66.9%	93.9%	64.5 %
Kaua'i	92.8%	70.6%	93.0%	72.8 %
Hawai'i Island	86.6%	58.1%	82.1%	57.3 %

Source: ARDA & Hospitality Advisors

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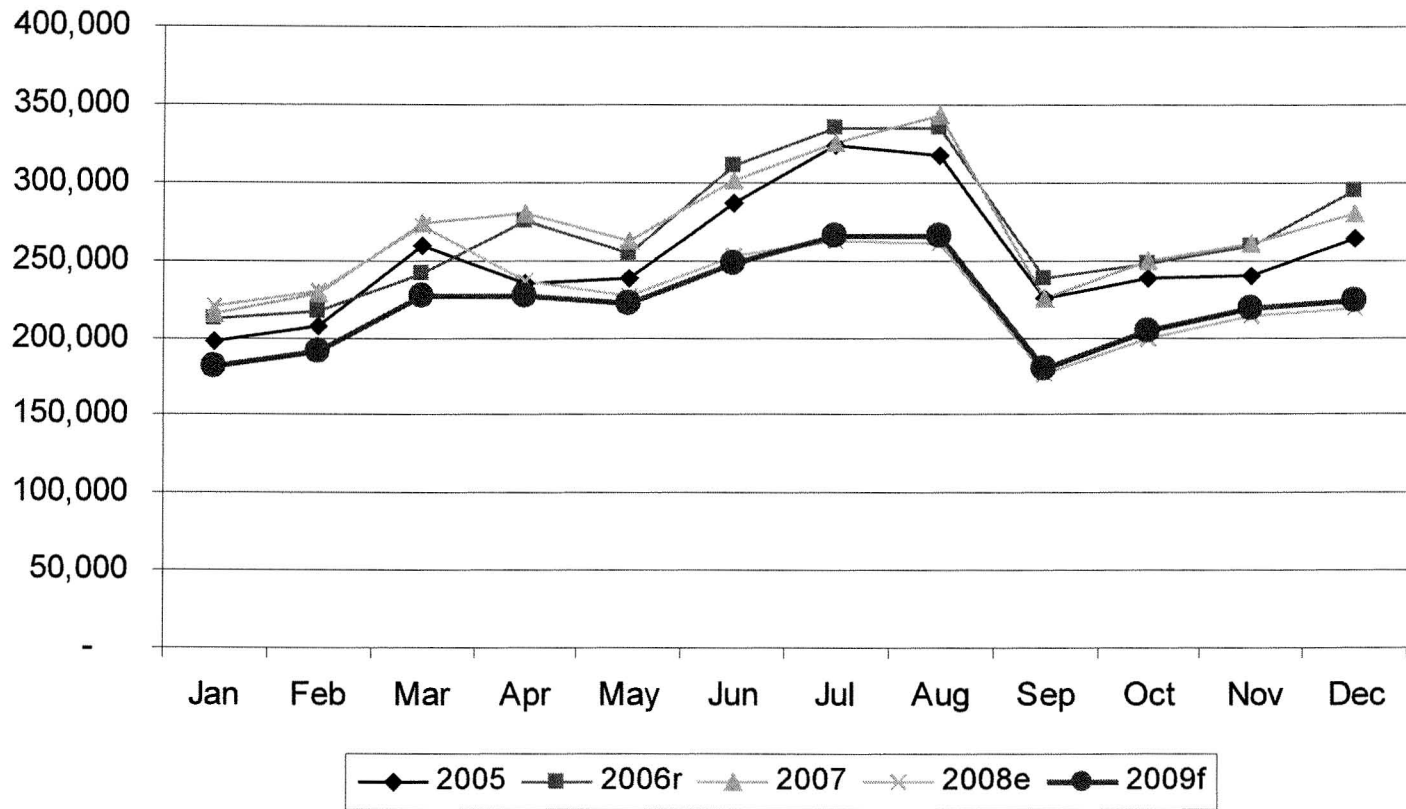


HTA Forecast Methodology (Arrivals)

- Reviewed forecasts by DBEDT, UHERO, BOH
- Developed assumptions for overall economic climate and then by MMA
- Looked at each MMA by quarters and historic arrivals, taking into account promotional activities, airlift, meetings and conventions



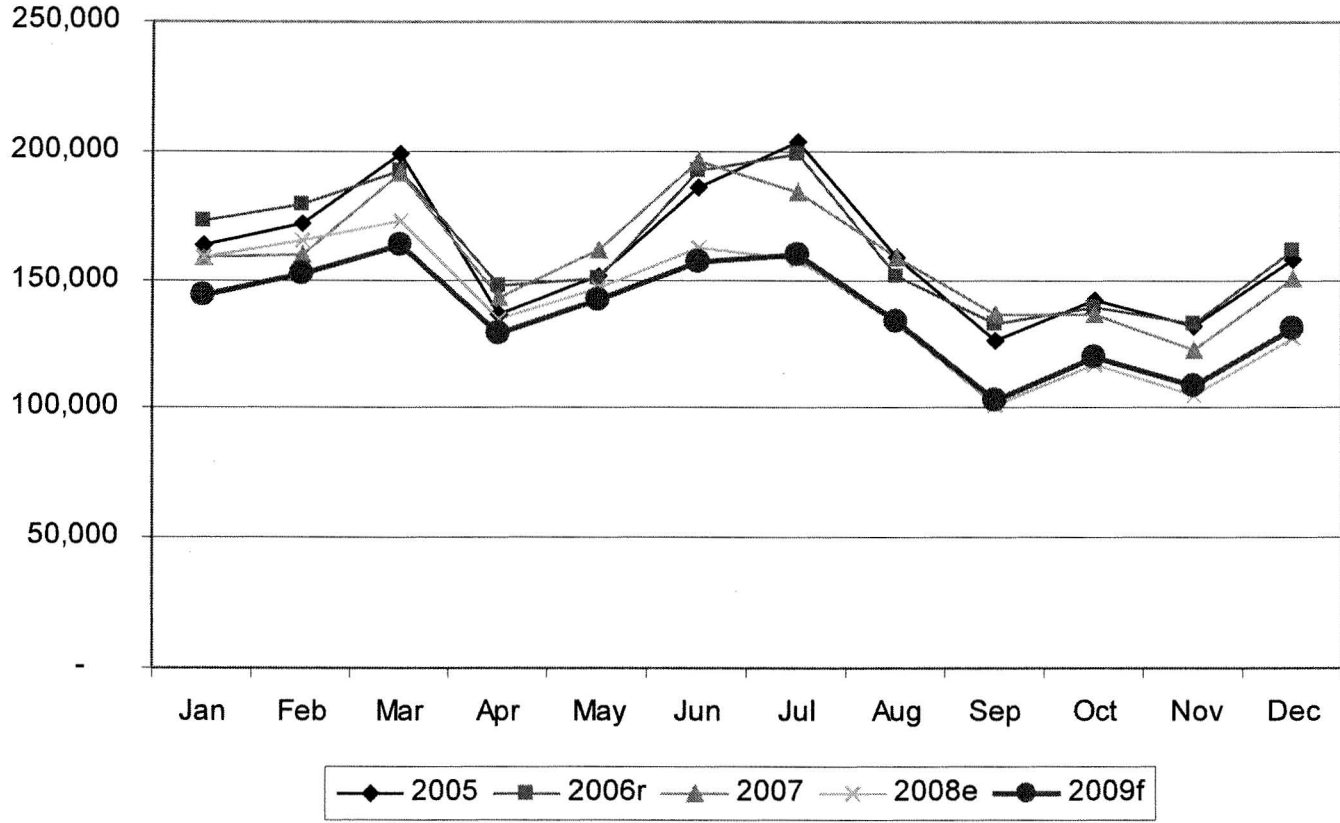
US West Arrivals 2005-2009F



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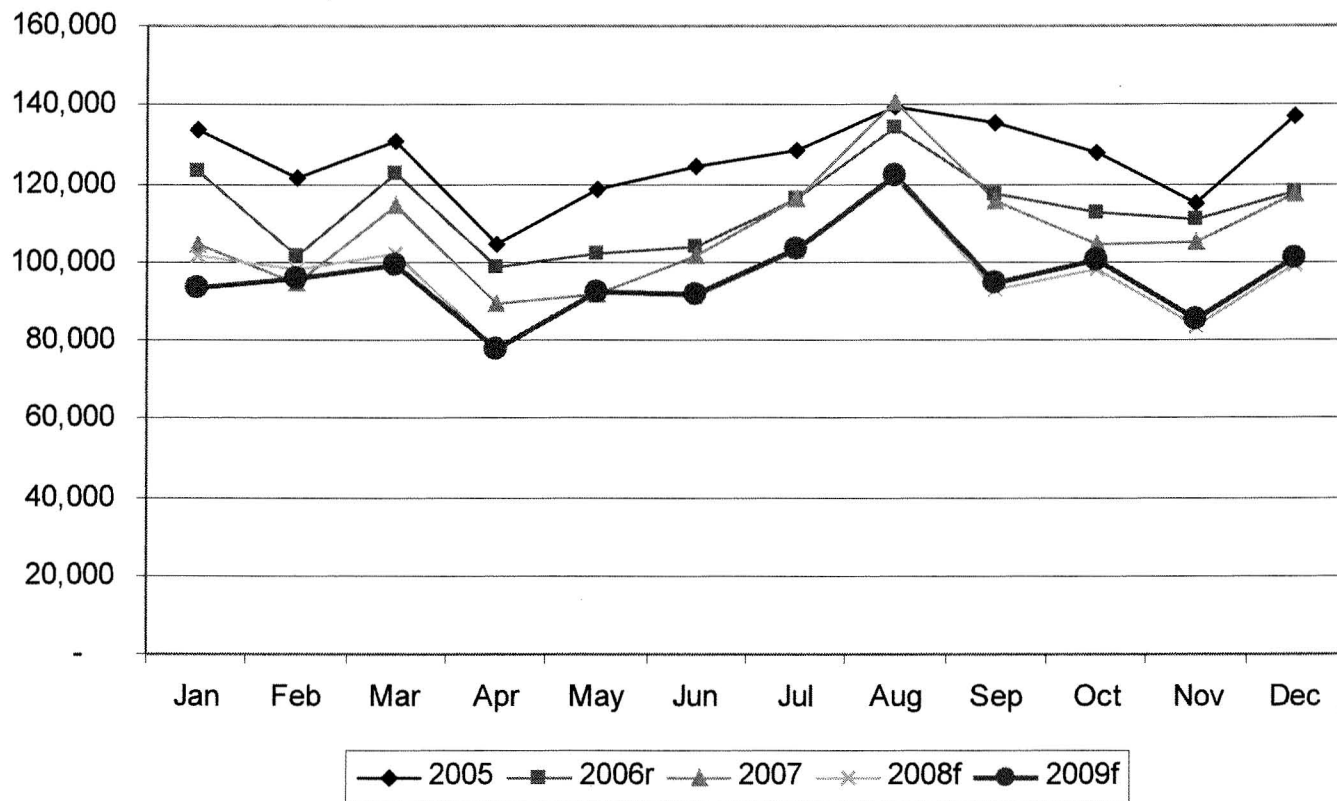


US East Arrivals 2005-2009F

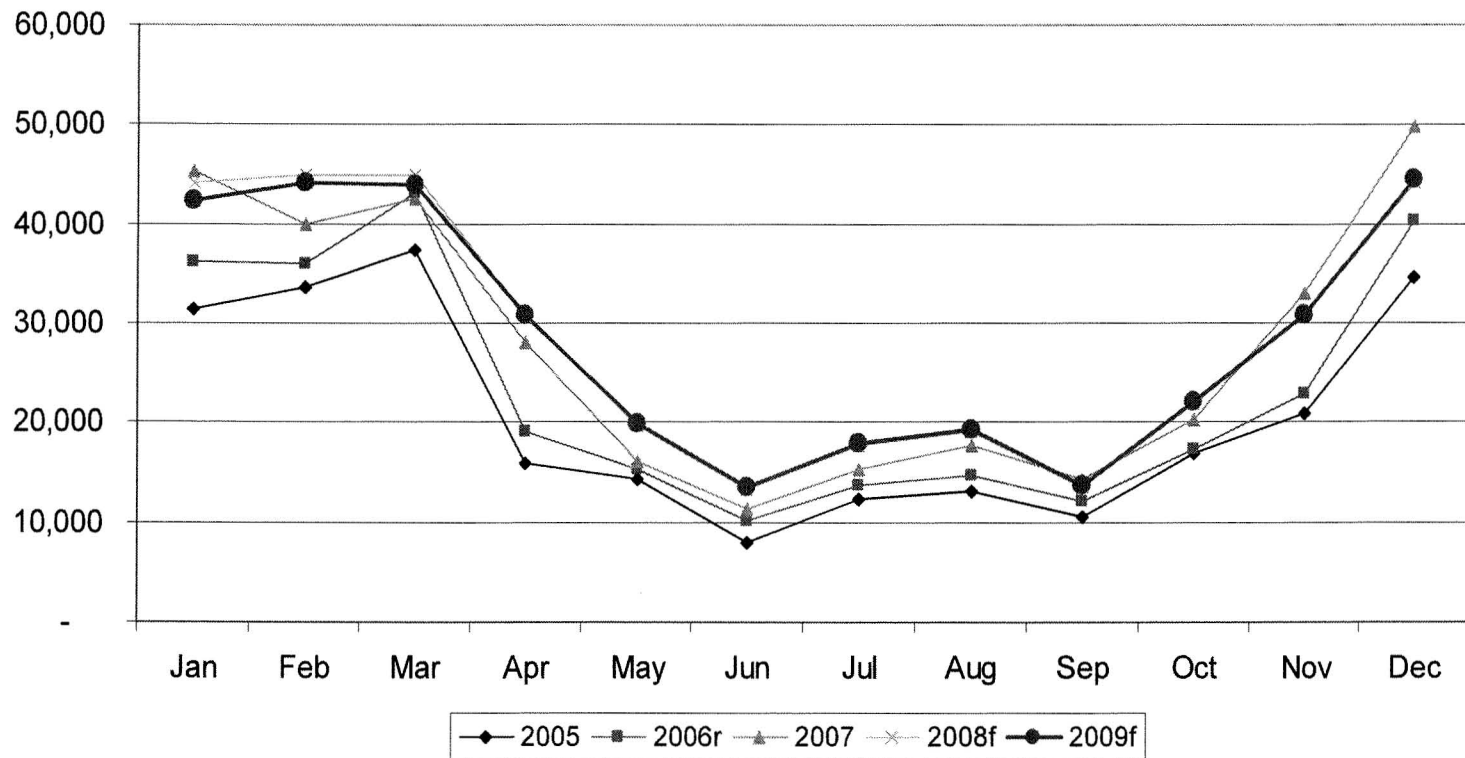




Japan Arrivals 2005-2009F



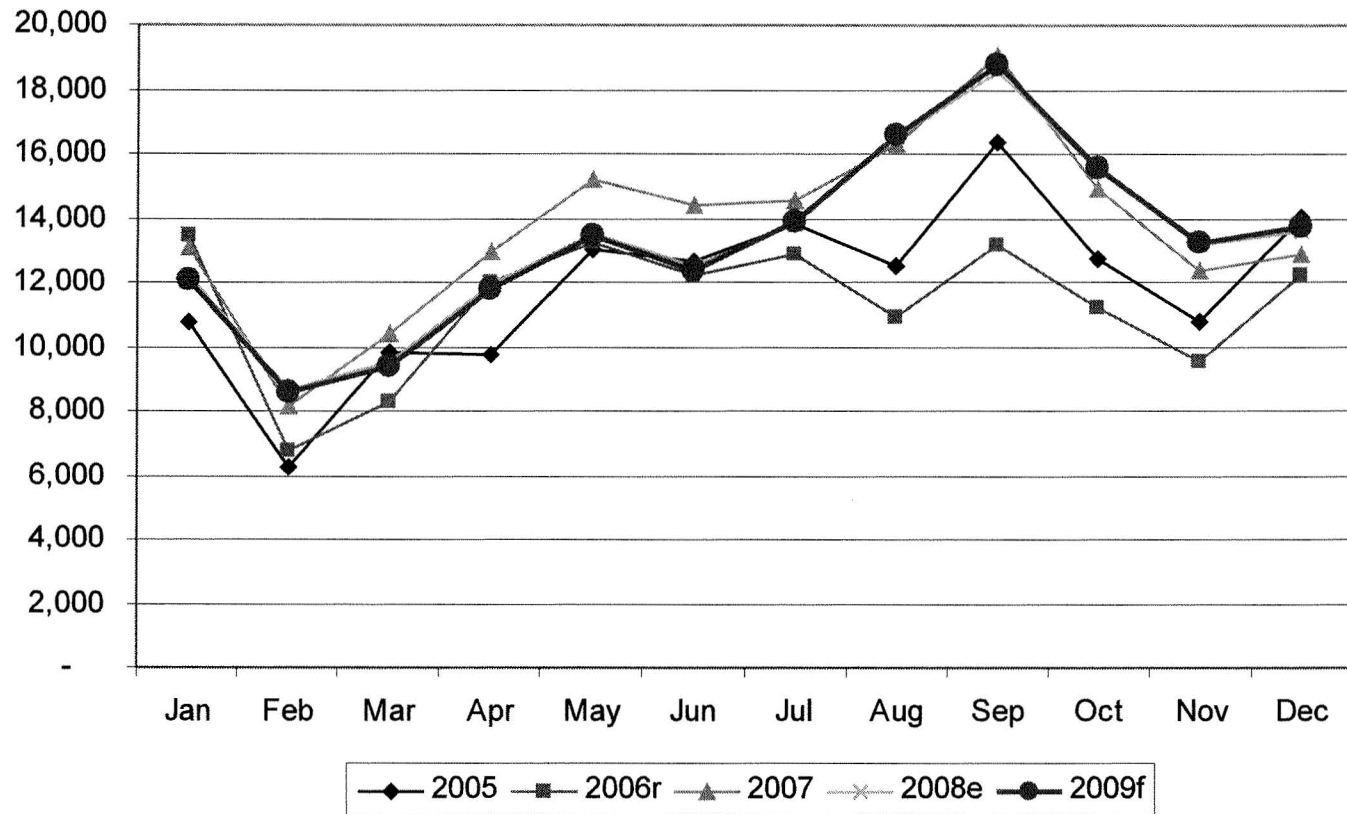
Canada Arrivals 2005-2009F



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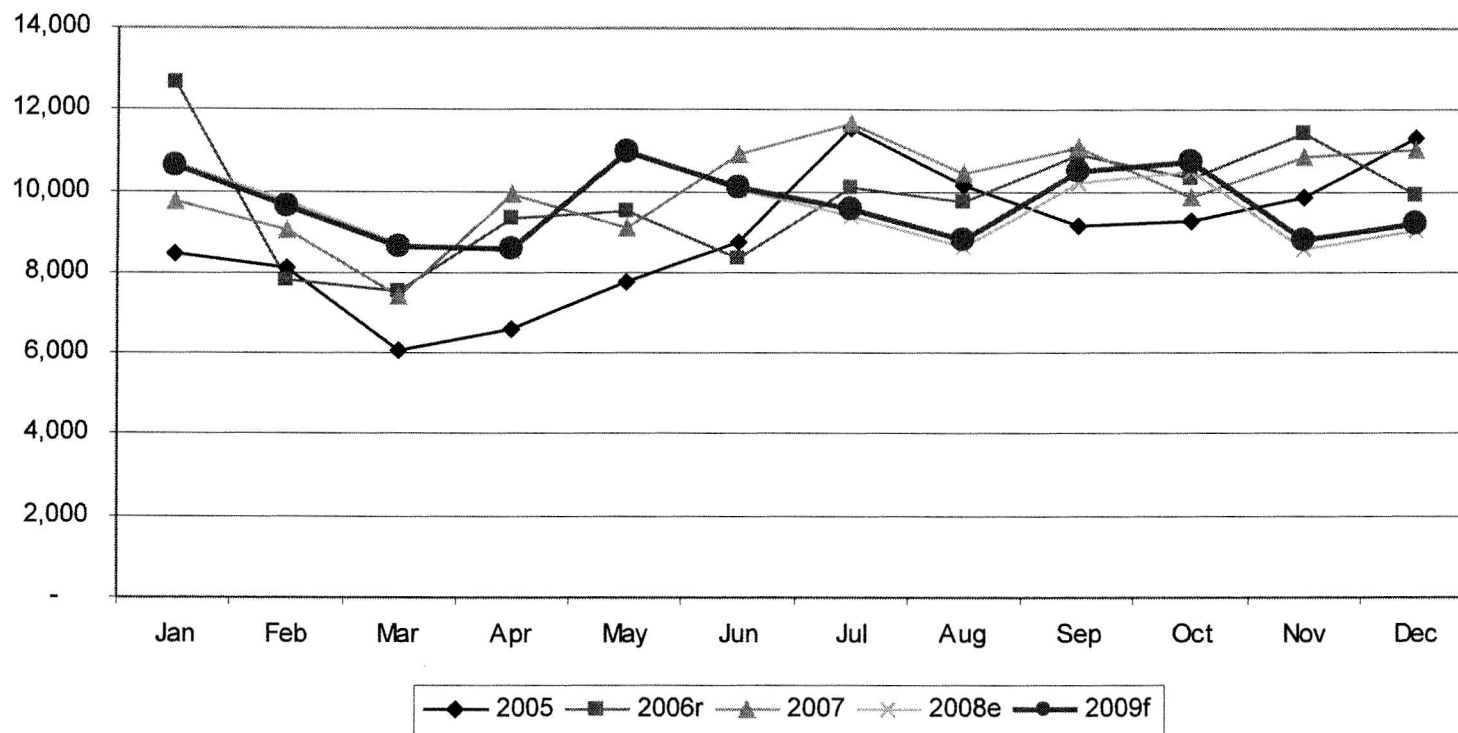


Oceania Arrivals 2005-2009F



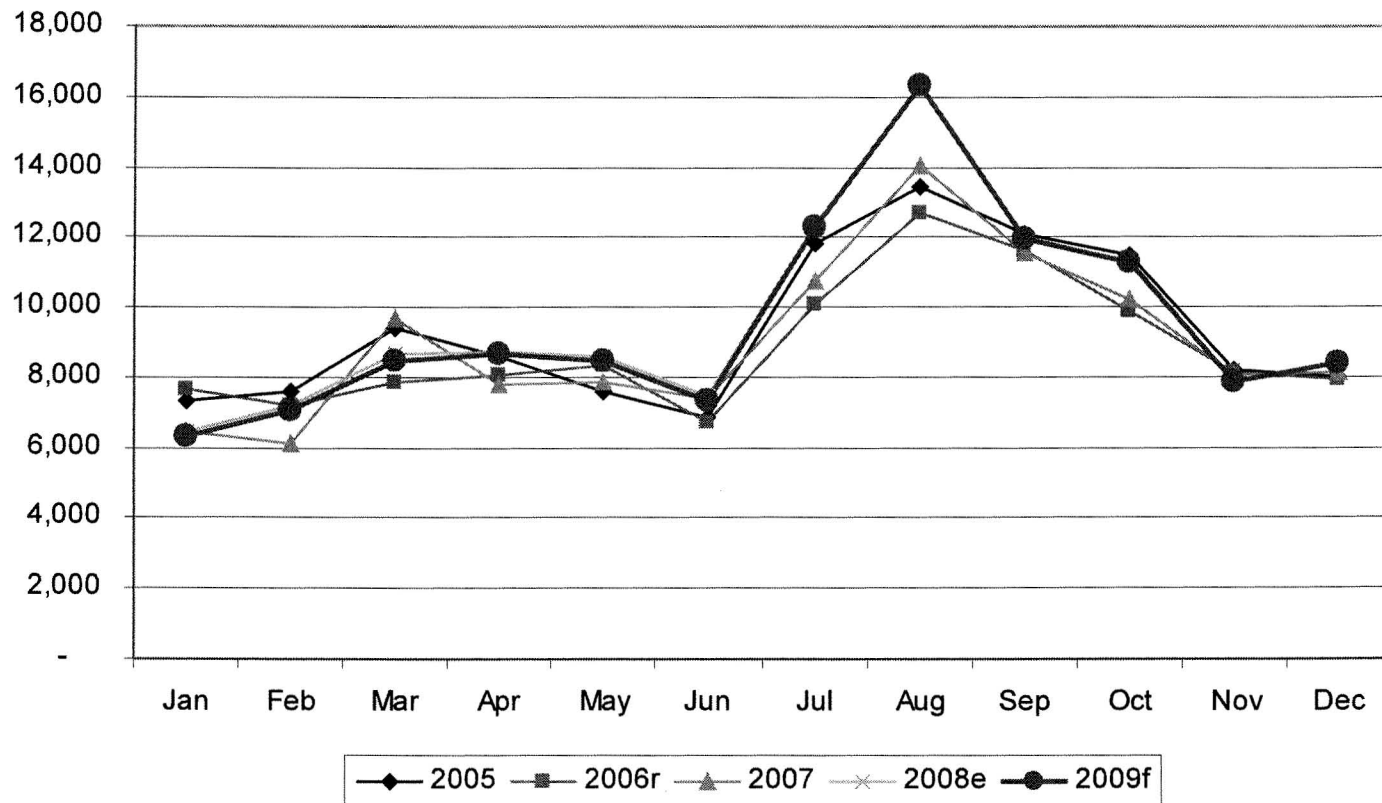


Asia Arrivals 2005-2009F





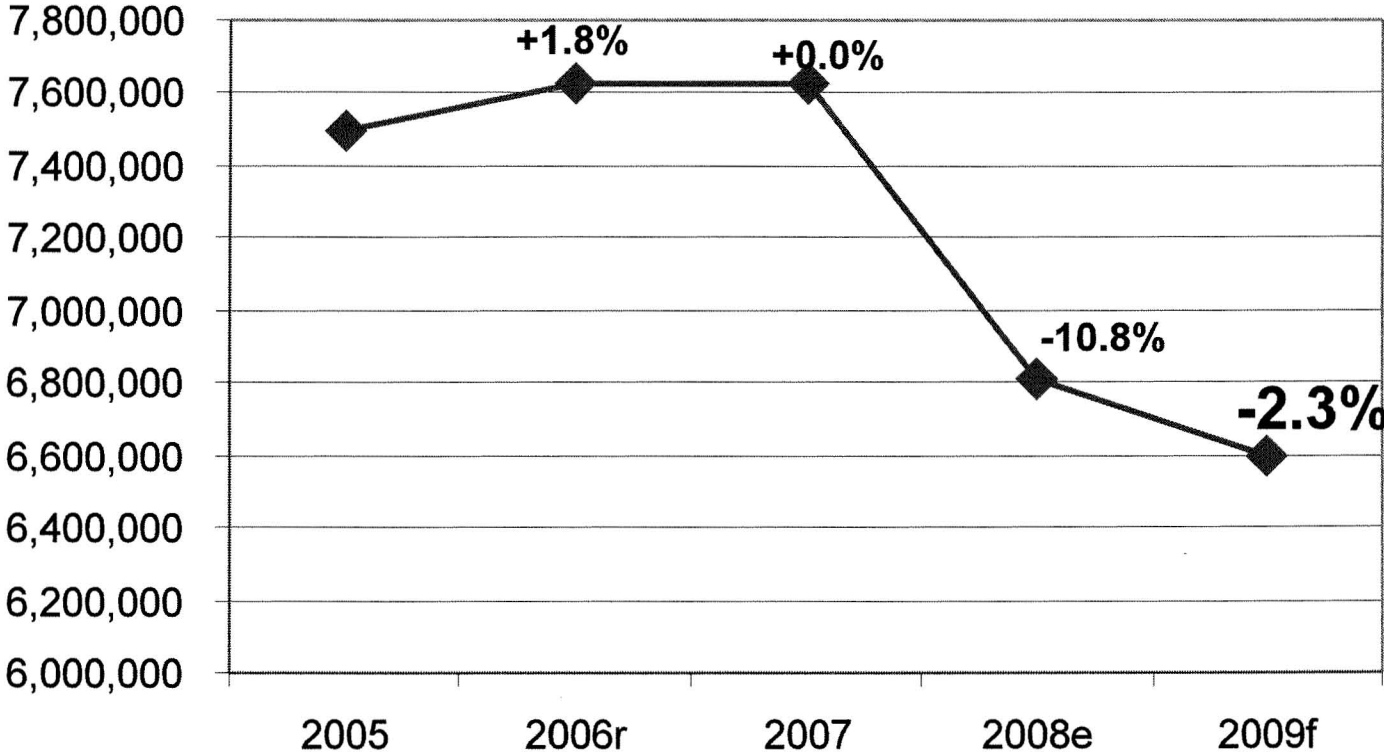
Europe Arrivals 2005-2009F



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Total Visitor Arrivals 2005-2009F



HTA's preliminary forecast.





Key Takeaways

- HTA is aligned with the State Tourism Strategic Plan which frames the marketing contractors activities within the Strategic Marketing Outline and Industry Stakeholders meetings
- HTA is constantly monitoring key industry indicators/gauges as well as tangible measurements
 - Marketing Effectiveness Study
 - Access – Return on Investment
 - Advertising Value Equivalency



Key Takeaways (cont.)

- HTA recognizes the significance of the culture, events, and festivals and their strategic alignment with the marketing of the destination.
- Access to our islands is a key denominator to the success of tourism and to the overall economy of Hawai'i.
- Our sensitivity to the balance for our islands with regards to arrivals and expenditures and the optimum customer profile that we market towards.

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North America

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Hawaii Visitors & Convention Bureau

January 30, 2009

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Annual Brand Program

Awareness

**Awareness of
Hawaii'i as a
wonderful place
to take a trip to**

Desire

**Desire to travel
to Hawaii'i
for a
vacation**

Intent

**Intend to visit
Hawaii'i within
the next
24 months**

Conversion

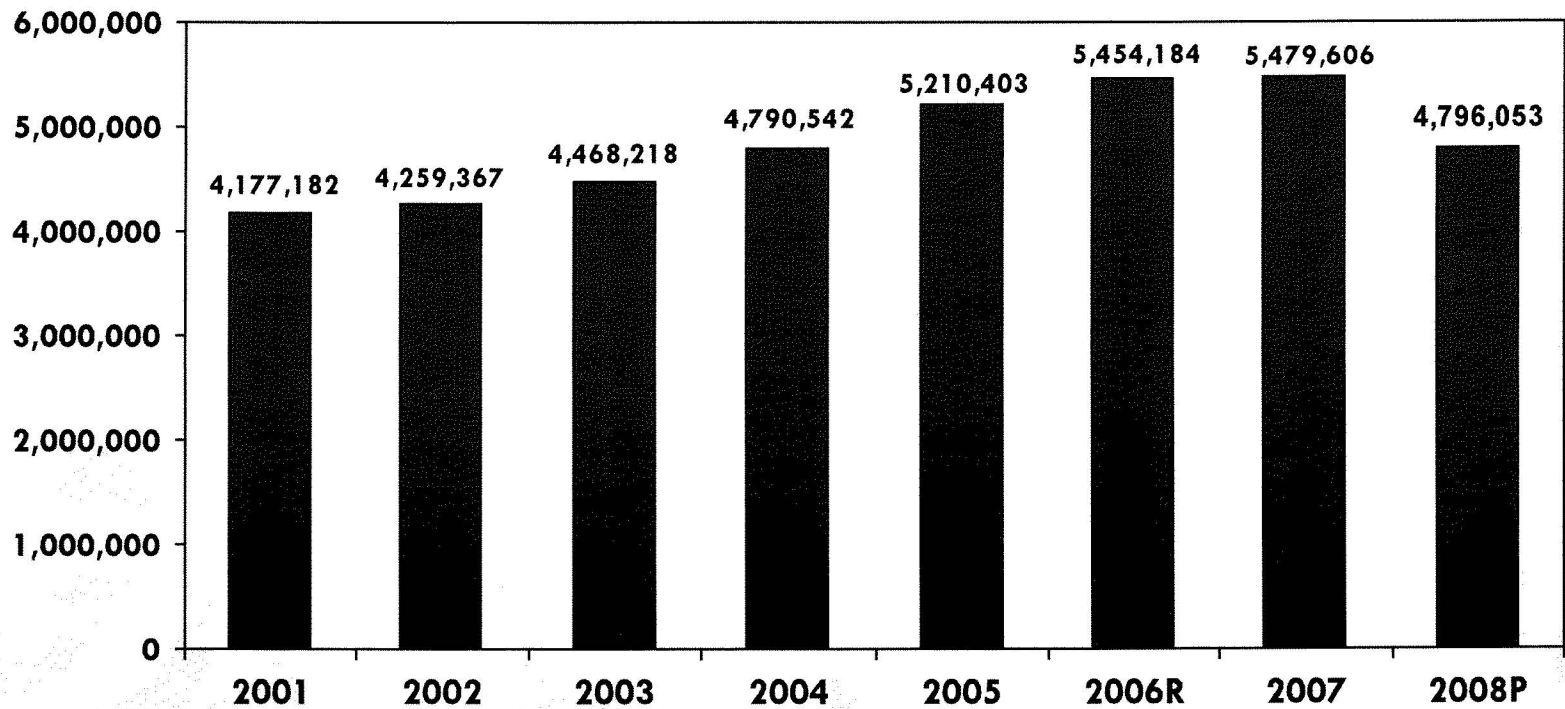
**Book a
vacation to
Hawaii'i**

HVCB RESPONSIBILITY

SUPPLIERS

Historical North America Arrivals to Hawai'i

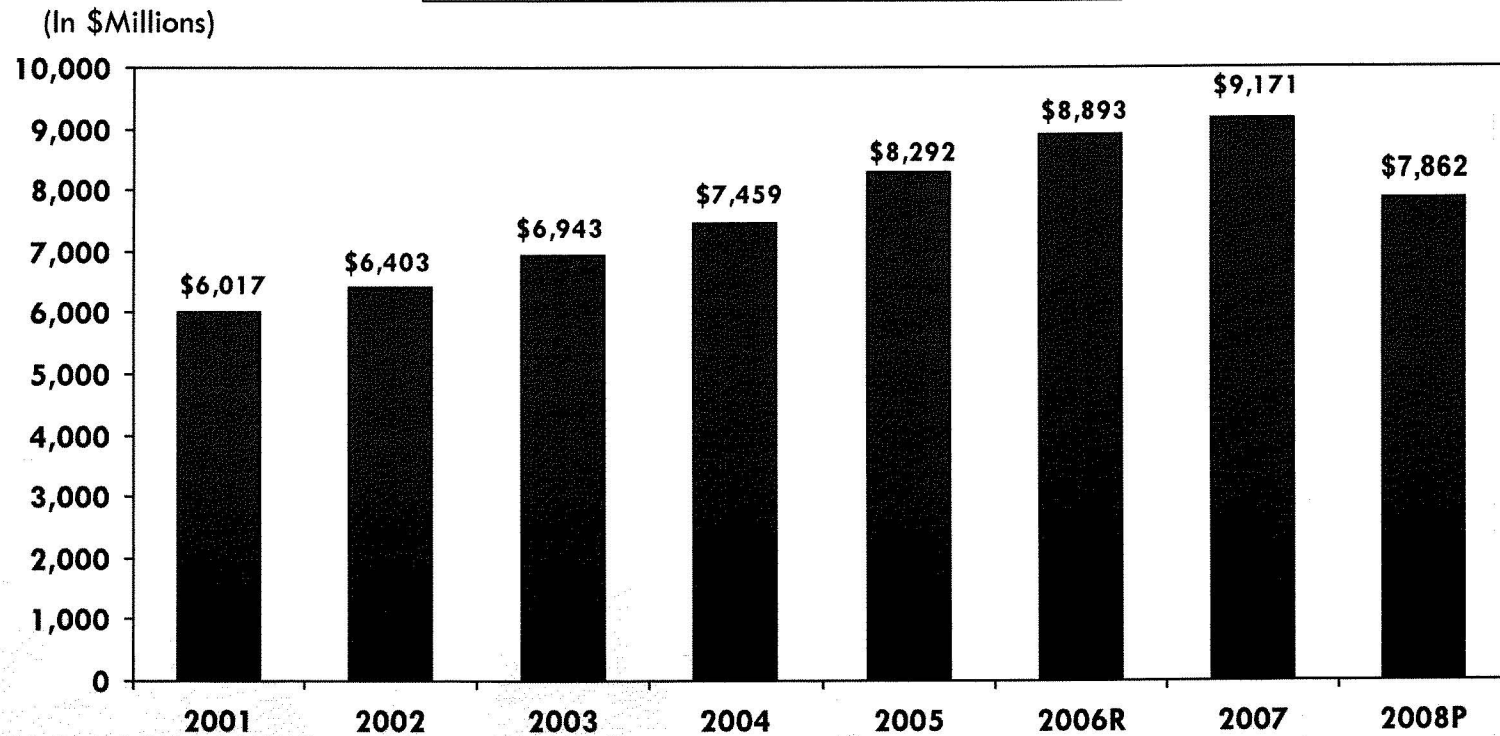
2007 vs. 2001 Growth: +31.2%
2008P vs. 2001 Growth +14.8%



Source: HVCB Market Trends analysis based on historic DBEDT data

Historical North America Visitor Expenditures

2007 vs. 2001 Growth: +52.4%
2008P vs. 2001 Growth: +30.6%



Source: HVCB Market Trends analysis based on historic DBEDT data

The Perfect Storm – First Wave

- **Summer 2007**
 - Sub-prime Crisis begins, Stock Market volatility
 - Softening National Economy
 - Slowing First Quarter Bookings

- **HVCB Action**
 - Moved up Marketing Programs to impact First Quarter 2008

2008 First Quarter Hawai'i Industry Indicators

	Visitor Arrivals			Visitor Spending (\$mil)		
	2008P	2007	%Chge	2008P	2007	%Chge
Total North America	1,353,976	1,355,177	-0.1%	\$2,324	\$2,343	-0.8%

Source: State Department of Business, Economic Development and Tourism

The Perfect Storm – Second Wave

- **April/May 2008**
 - **Skyrocketing Oil Prices**
 - **Impact on Low Fare Carriers**
 - **Legacy Carriers Evolve Strategy**
 - **From Market Share to Maximizing Yield**
 - **Aloha/ATA failures**
 - **Loss of 15% of Hawaii airlift**
- **HVCB Action**
 - **Need to drive demand to maintain airlift beyond Aloha/ATA loss**

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AP Associated Press

ATA, Aloha Woes Likely Mean Higher Fares

By SUDHIN THANAWALA, Associated Press Writer
Friday, April 4, 2008

PRINT E-MAIL SHARE COMMENTS (7) FONT SIZE: TOOLS SPONSOR: veri on

(04-04) 03:31 PDT Honolulu (AP) --

The abrupt shutdowns of ATA Airlines and Aloha Airlines won't keep travelers off Hawaii's shores altogether, but they could make an already expensive vacation destination even pricier and potentially put the leis and luaus out of reach for many.

Flights to and from Hawaii had been a key part of ATA's business ever since the Indianapolis-based carrier scaled back its route network following a previous trip through

Travel Woes

- ATA returns to bankruptcy (4/3)
- ATA, Aloha woes likely mean higher fares (4/3)
- Aloha, Molokai shutdowns tough on travelers (4/3)
- United grounds planes for safety inspections (4/3)
- American, Delta cancel more flights (3/28)
- Southwest grounds 43 planes (3/13)

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Scouting the best airfares, hotels, cruises and vacation packages

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Will summer airfares from LAX to Hawaii soar?



Given the recent vanishing acts by Aloha Airlines and ATA (among others), I'm expecting to see flight prices to Hawaii skyrocket soon. It's a no-brainer, isn't it? Fewer seats + summer season demand = increased rates.

Doing some online poking around, I tested out potential trip costs for May 12-16, 2008. Via Kayak, I found a \$623 fare (including taxes) nonstop on Continental Airlines, from Los Angeles (LAX) to Honolulu, Hawaii (HNL). On Orbitz, I tried July 17-22, 2008, and found a Delta Air Lines flight for \$632 (including taxes) from LAX to Kona, Hawaii; at time of checking, only two seats were left at this price, and the next available fare was \$679 on Alaska Airlines.

So, it looks like nothing too drastic has yet occurred with summer rates.

These prices, available now, are not all that different than the price tags on last summer's Hawaii airfares.

The question then becomes, *will* prices increase? Most of the experts believe so, including SmarterTravel's Ed Perkins who, in a recent column, predicted that "Hawaiian airfares and total travel costs will go up

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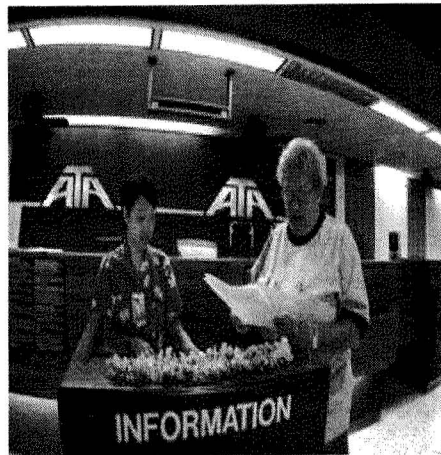
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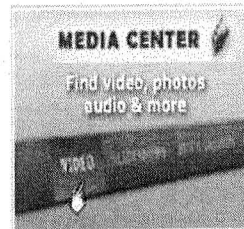


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ATA ticket holder Terry Rudolph of Colorado Springs, Colo., speaks with State of Hawaii information agent, Lisa Young, while she tries to rebook her flight out of Honolulu International Airport.

Associated Press



ORDER PHOTO REPRINTS

Hawaii air fares expected to take off

Associated Press

PRINT E-MAIL STORY

Published: 4/6/2008 1:30 AM

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A HEAVY TOLL

HAWAII
Visitors & Convention Bureau




Eastern Canada

Visiting Hawaii gets even pricier

Published Saturday April 12th, 2008

Bankruptcies at ATA Airlines, Aloha Airlines, likely mean higher Hawaii fares

G4 By Adam Schreck
THE ASSOCIATED PRESS

 SPEAKUP  EMAIL  PRINT  FACEBOOK  DIGG  DELICIOUS  STUMBLE UPON

The abrupt shutdowns of ATA Airlines and Aloha Airlines won't keep travellers off Hawaii's shores altogether, but they could make an already expensive vacation destination even pricier and potentially put the leis and luaus out of reach for many.

Flights to and from Hawaii had been a key part of ATA's business ever since the Indianapolis-based carrier scaled back its route network following a previous trip through bankruptcy in 2006.

On April 10, the airline suddenly quit flying, leaving passengers on the islands and elsewhere stranded as it again headed for bankruptcy court.

Virtually all the carrier's more than 2,200 employees were laid off.

"It'll hurt," said Minneapolis-based airline expert Terry Tripler. "They did a lot of business to and from Hawaii at fairly reasonable prices."



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Panic in paradise: Are high fares the new reality for Hawaii?

Updated 11:45h ago | Comments 9 | Recommend 4

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By Molly Feltner, Smarter Travel.com

Earlier this month there was panic in paradise. On March 31, Aloha Airlines, a 60-year veteran of Hawaii aviation, abruptly shut down, followed two days later by ATA, an airline known for cheap flights to four of Hawaii's islands. With those shutdowns, Hawaii lost 15% of its service from the mainland, or about 1.1 million seats annually.

Price gouging for travelers flying to or from the West Coast cities served by the airlines set in immediately, with stranded passengers quoted prices up to \$1,000 for one-way flights out of Honolulu on other airlines. While ticket prices remain exorbitant for this week, as travelers stuck with worthless Aloha and ATA tickets scramble to get to or from Hawaii, looking forward, increases seem a lot less daunting.

The lowest average round-trip fares between the major cities affected—Los Angeles, Oakland, San Diego, San Francisco, and Honolulu—drop considerably for travel later this month. The bad news is those fares are about \$60 to \$100 higher than pre-April prices, and they don't appear to drop any further for travel during the remainder of the year. You can expect those fares to spike by \$200 to \$400 for the usual summer high season between late May and late August, and by \$200 for the December holidays.

Today's top travel deals

What's this?

Up to 25% off: Upscale Tahoe resort from \$99/night • BookIt.com

\$91/nt+: 11-night deluxe Hawaii sailing to Lahaina & Oahu • Celebrity

\$363+: Vegas 2-nt trip at palatial resort w/airfare • The Venetian

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2008 Summer Promotion

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Newspaper – Sunday Travel Sections

- Los Angeles Times
- Orange County Register
- San Diego Union-Tribune
- San Francisco Chronicle
- Sacramento Bee
- Oakland Tribune
- Marin Independent Journal
- San Jose Mercury News
- Contra Costa Times
- San Mateo County Times

This summer,
Hawai'i has lots to offer.

Save \$200 off your trip
to the Islands right now.

Book now at gohawaii.com/summer

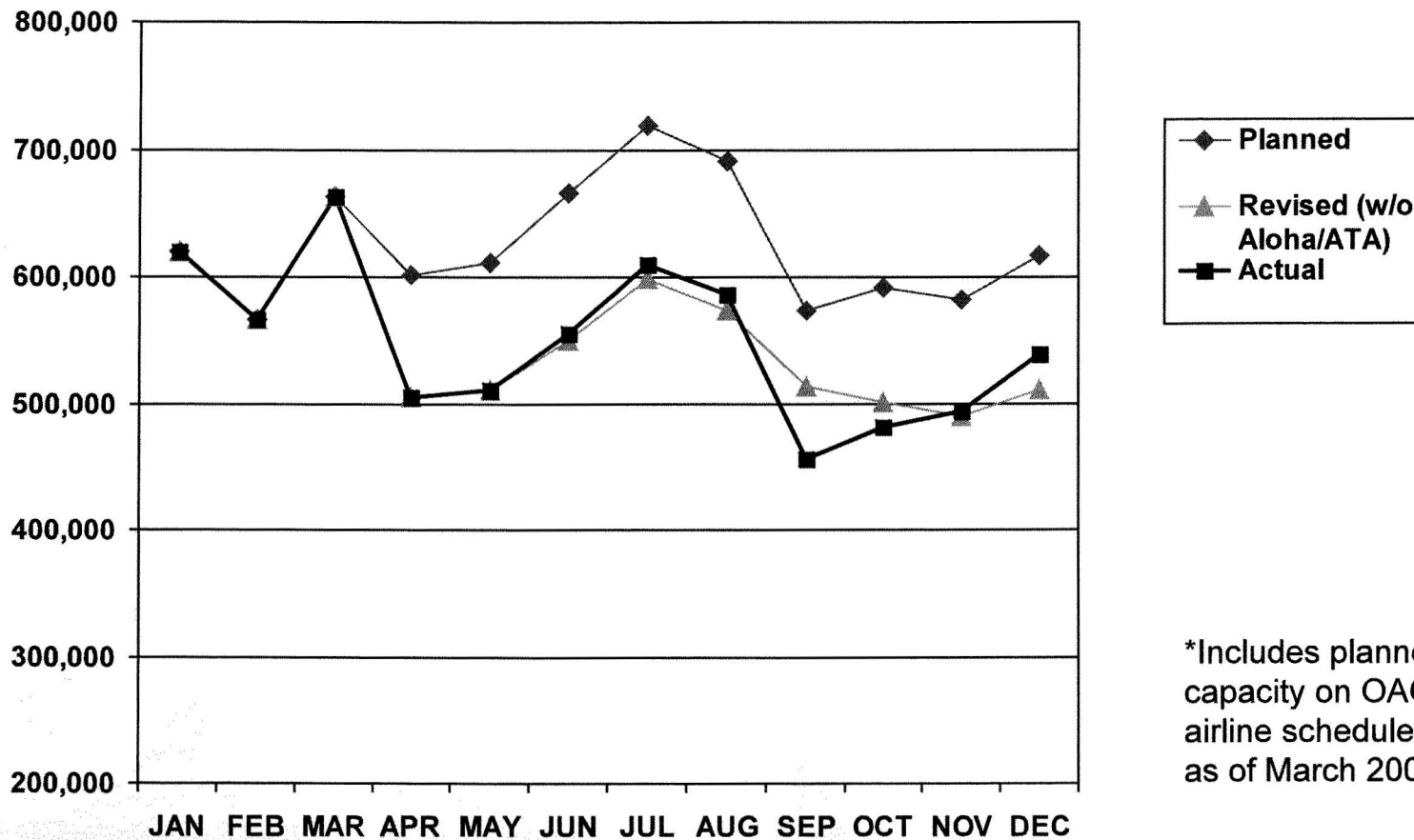
HAWAII
THE ISLANDS BY ALoha

2008 Summer Promotion

Consumer – Public Relations

- **Promoted Summer Campaign via news release distribution to local, trade, online, and national media**
- **Leveraged CMMP partnerships with ABC TV stations**
 - **In-market promotional sweepstakes and on-air exposure through morning shows**

2008 Planned* vs. Actual Scheduled Nonstop Domestic Air Seats to Hawai'i



Source: Sabre ADI database

*Includes planned capacity on OAG airline schedules as of March 2008

The Perfect Storm – Third Wave

- **Summer/Fall 2008**
 - Air Fares climb as Legacy Carriers drastically cut back flights across their systems
 - Hawaii perceived as high-priced and out-of-reach
 - Global Stock Market meltdown in October
- **HVCB Action**
 - Analyzed marketplace, mounted a direct attack
 - Discovered 2008 Package prices (air, hotel, car, etc.) actually less expensive than 2007
 - Nationwide multi-media campaign


High Price Perception

10 most expensive states for travelers - latimes.com - Microsoft Internet Explorer

latimes.com
10 most expensive states for travelers

Los Angeles Times

PREVIOUS 1 2 3 4 5 6 7 8 9 10 NEXT ▶



The AAA 2008 Vacation Costs Survey, which culls published rates for more than 60,000 restaurants and lodgings, recommends a budget of \$244 per day for two while traveling in North America.


Here are the states found to be the most expensive vacation spots. (Costs are based on average published prices for meals and lodgings for two people.)

1. Hawaii

Lodging: \$675.30
Meals: \$117.40
Total average daily cost: \$792.76

*Photo: Muluopoe Beach near the hotel at Manele Bay.
(Beverly Beyette / Los Angeles Times)*

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UNITED VACATIONS

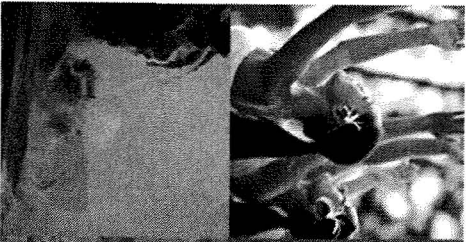
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2008 Winter Promotion

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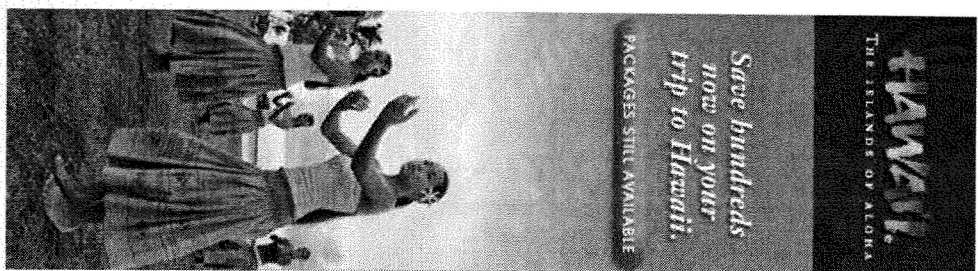
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Some conditions and restrictions apply. Please see go.hawaii.com/deals for details.

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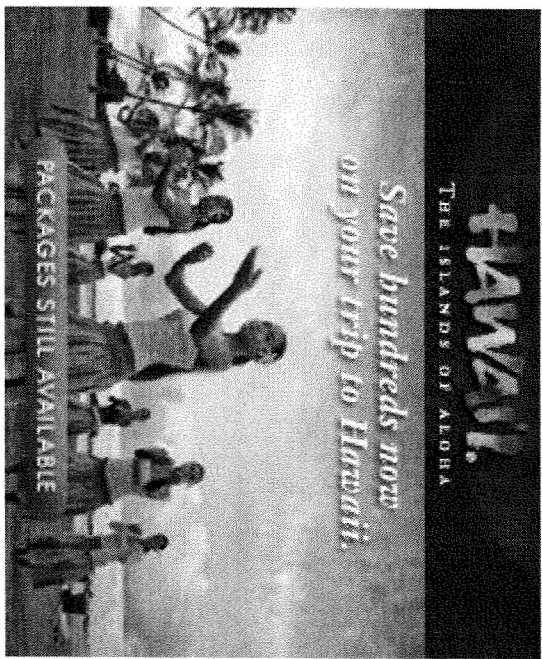
Consumer – Online



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Save hundreds now on your trip to Hawaii.

PACKAGES STILL AVAILABLE



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Visitors & Convention Bureau

2008 Winter Promotion

Consumer – Public Relations

- Return On Vacation
 - News Release
 - Media Blitz

HAWAII VISITORS & CONVENTION BUREAU
3370 Kalanianaʻolu Avenue, Suite 604
Honolulu, Hawaii 96813
TELEPHONE: (808) 933-0811
FAX: (808) 934-0190
EMAIL: info@hvcb.org
WEBSITE: gohawaii.com

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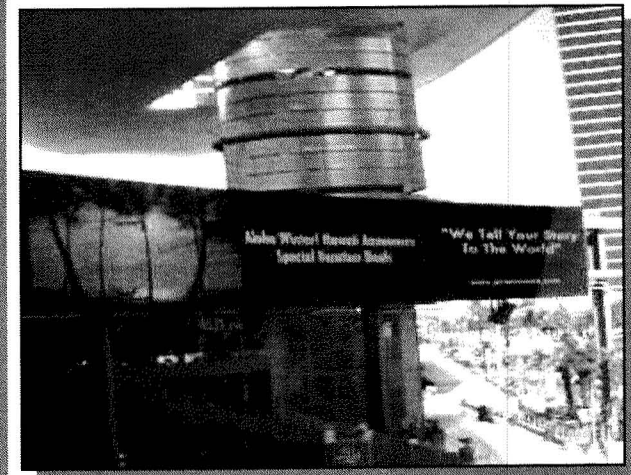
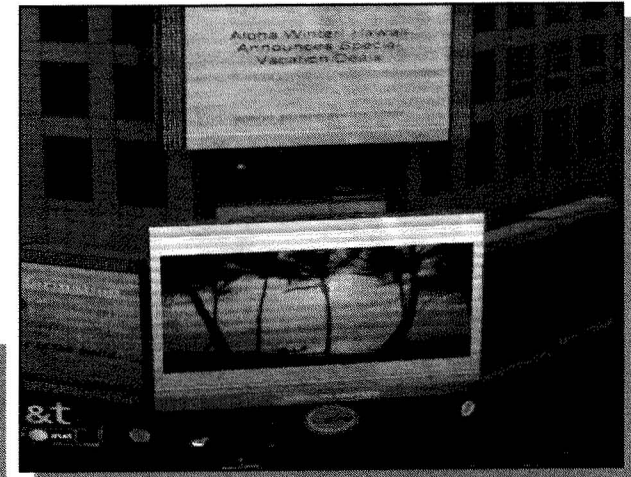
FOR IMMEDIATE RELEASE
October 14, 2008

ALOHA WINTER! HAWAII ANNOUNCES SPECIAL VACATION DEALS

HONOLULU – Under the theme *Discover More Of Hawaii For Less Than You Imagined*, the Hawaii Visitors and Convention Bureau (HVCB) has launched a winter vacation campaign offering travel packages to the Hawaiian Islands at deeply discounted savings.

“These packages are good news for travelers who may have been deferring a Hawaii vacation over cost concerns,” said John Monahan, HVCB president and CEO. “The savings being offered mean the cost of a Hawaii vacation can now be less than a year ago.”

Recognizing that travelers in this economic environment are seeking incredible experiences unique to a destination, but at a great value, HVCB has introduced a new website – GoHawaii.com/Value – listing the Hawaii vacation deals. Visitors are encouraged to check back frequently to view updates and new offers as they become available.



HAWAII!
Visitors & Convention Bureau

2008 Winter Promotion

Website Offers Page

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[BOOK NOW >](#)

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Hawaii Up to 50% Off on Expedia

Increase your fall vacation savings with our amazing Expedia offer. Book a last-minute Hawaii escape on Expedia and save up to 50% on your flight.

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SAVE TO HAWAII!

Save \$150 off vacation packages and more on your trip to Hawaii. Starting now through 2011.

[BOOK NOW >](#)

HAWAII VACATIONS
Save Up to \$200 on 5+ Night Escapes

Get the best rates on hotels with Travelocity. Book a flight + hotel package of two nights or more, and you'll get up to \$200 off on your hotel's benefits and more.

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Save up to \$500 off your airfare when you book your travel to Hawaii with Classic Vacations. Let Classic customers enjoy perfect vacation with 35 luxury hotels.

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FEATURED VIDEOS

See how an Aloha shirt can tell a story in 1:16.

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Go on a whale watching tour off of Lohaina, Maui.

[WATCH THE VIDEO >](#)

See authentic hula on the south shore of Kauai.

[WATCH THE VIDEO >](#)

FEATURED EVENTS CALENDAR

27th Annual Honolulu Century Ride
September 24, 2008, Oahu

Check on the events of fall in Hawaii's oldest and largest cycling event.

[LEARN MORE >](#)

Annual Ha Waikoa O Ke Kai Canoe Race
September 24, 2008, Oahu

Be the first to witness the world's top kanoa paddlers compete for the \$100,000 prize.

[LEARN MORE >](#)

7th Annual Kaula Powwow
September 24-25, 2008, Kaula

Make it an event and take a Hawaiian culture come together in the food and fun-filled powwow.

[LEARN MORE >](#)

26th Queen Liliuokalani Festival
September 24, 2008, Hawaii's Big Island

Enjoy the fun and festivities of 50th's longest play tribute to Hawaii's last monarch.

[LEARN MORE >](#)

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HAWAII NEWS

HAWAII
Visitors & Convention Bureau

Winter Program Elements

Consumer – Public Relations



AP Associated Press



Hawaii promotes its 'value'



Shutdown of Aloha, ATA airlines results in fewer visitors

HONOLULU (AP) — Hawaii's tourism industry is offering new deals, incentives and packages as it grapples with turbulent airline industry and Americans holding tight to their wallets.

Officials on Wednesday unveiled a \$4.5 million campaign to lure visitors for the remainder of the year. The effort is part of the more than \$12.5 million in emergency funding that has been devoted by the state and businesses to combat a slump in tourism.

One component is promoting Hawaii as a destination, which is intended to dispel the perception that the islands have become too expensive to visit. It's cheaper to go to Vietnam, Bali and some of these other places like Mexico, but at the end of the day, there's nothing like Hawaii.

experience." Officials said despite rising airfares, a Hawaiian vacation prices less this year by hundreds compared with last year. Officials are offering a complimentary night or breakfast and more business. Officials are offering 2-for-1 deals on activities.

As part of the Hawaii Visitors and Convention Bureau's new winter campaign, advertisements featuring humpback whales, hula dancers and breathtaking scenery will start appearing in newspapers this Sunday. Targeted banner ads will also appear on Web sites.

Over the past decade, officials have faced many challenges that have taken a toll on the industry.

Seattle Post-Intelligencer

"This is the classic perfect storm," said John Monahan, the bureau's top editor.

San Jose Mercury News

two major carriers serving the islands

The Reporter

VACAVILLE, CALIFORNIA

Coast, according to the latest state figures.

San Diego Daily Transcript

INTERNATIONAL Herald Tribune

THE GLOBAL EDITION OF THE NEW YORK TIMES

YAHOO! FINANCE



2008 Winter Promotion

Consumer – Public Relations

THE WALL STREET JOURNAL.

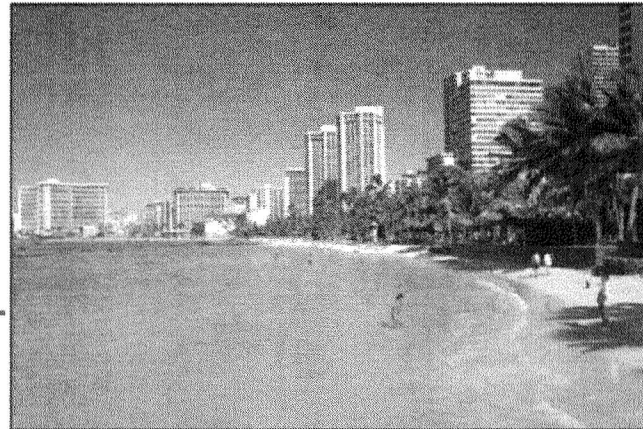
TRAVEL TO HAWAI‘I The World’s Best Return-On-Vacation

If you work hard for a living, you know that getting away from it all isn't an indulgence. It's a necessity. But before you make your escape, it's also necessary to know you're getting the best possible value for your travel dollar. So while you're debating when and where to go this year, it helps to know that Hawai'i offers a greater "Return-On-Vacation" than any other destination.

A Hawai'i vacation gives you the all-too-rare opportunity to truly relax, to replenish your spirit, reunite with family and friends, renew your sense of adventure, and explore the natural wonders of our planet.

Hawai'i's six major islands are green-capped mountains lifted from the bottom of the sea, decorated with rainbows, surrounded by blissfully clear waters, and rimmed by sun-swept, sugary-sand beaches.

The "Big Island" of Hawai'i is known for its two active volcanoes but it also boasts a royal palace, a festival devoted to ancient hula, and countless other reminders of Hawai'i's rich cultural heritage.



Waikiki, the world's most celebrated stretch of beach

HAWAI'I.
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Obama Microsite and Promotion

Publicity Campaign directed to print and broadcast media, online media outlets, and blogs.

Obama's Hawaii

Learn about President Barack Obama's childhood in Hawaii and the places he visits when he returns.



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THE ISLANDS OF ALoha

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FIND VACATION IDEAS

ISLAND:

WATCH THE LATEST STORIES OF HAWAII VIDEO

CREATE A LOT OF

BARACK OBAMA'S HAWAII

KAMA'OA: LEGAL AT HEART

The Hawaiian word kama'oa means someone who is native



HAWAII
Visitors & Convention Bureau

Obama Microsite and Promotion

gohawaii.com/obama



gohawaii.com/obama

FOR IMMEDIATE RELEASE
November 26, 2008

TRAVELERS CAN EXPERIENCE BARACK OBAMA'S HAWAII President-Elect Was Born and Raised in Honolulu

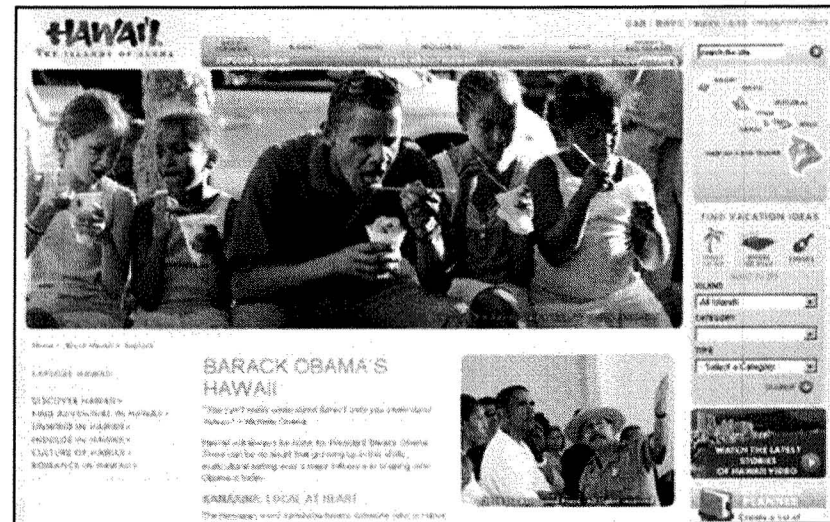
HONOLULU – Honolulu is proud to be the birthplace and boyhood home of President-elect Barack Obama and visitors to Hawai'i can easily explore the sites and favorite places that shaped the foundation of his life and rise to becoming the leader of the free world.

The young Obama flourished in the Islands, where local values foster tolerance, compromise and mutual respect – and where diversity defines people rather than divides them. The social mores of the Aloha State and the experience of growing had a deep and lasting influence on the President-elect.

Fans of Hawai'i's native son can visit more than two dozen O'ahu including:

Obama's Hawaii

Learn about President Barack Obama's childhood in Hawaii and the places he visits when he returns.



The New York Times

YAHOO!

USA TODAY

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The Honolulu Advertiser

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2009 Plan

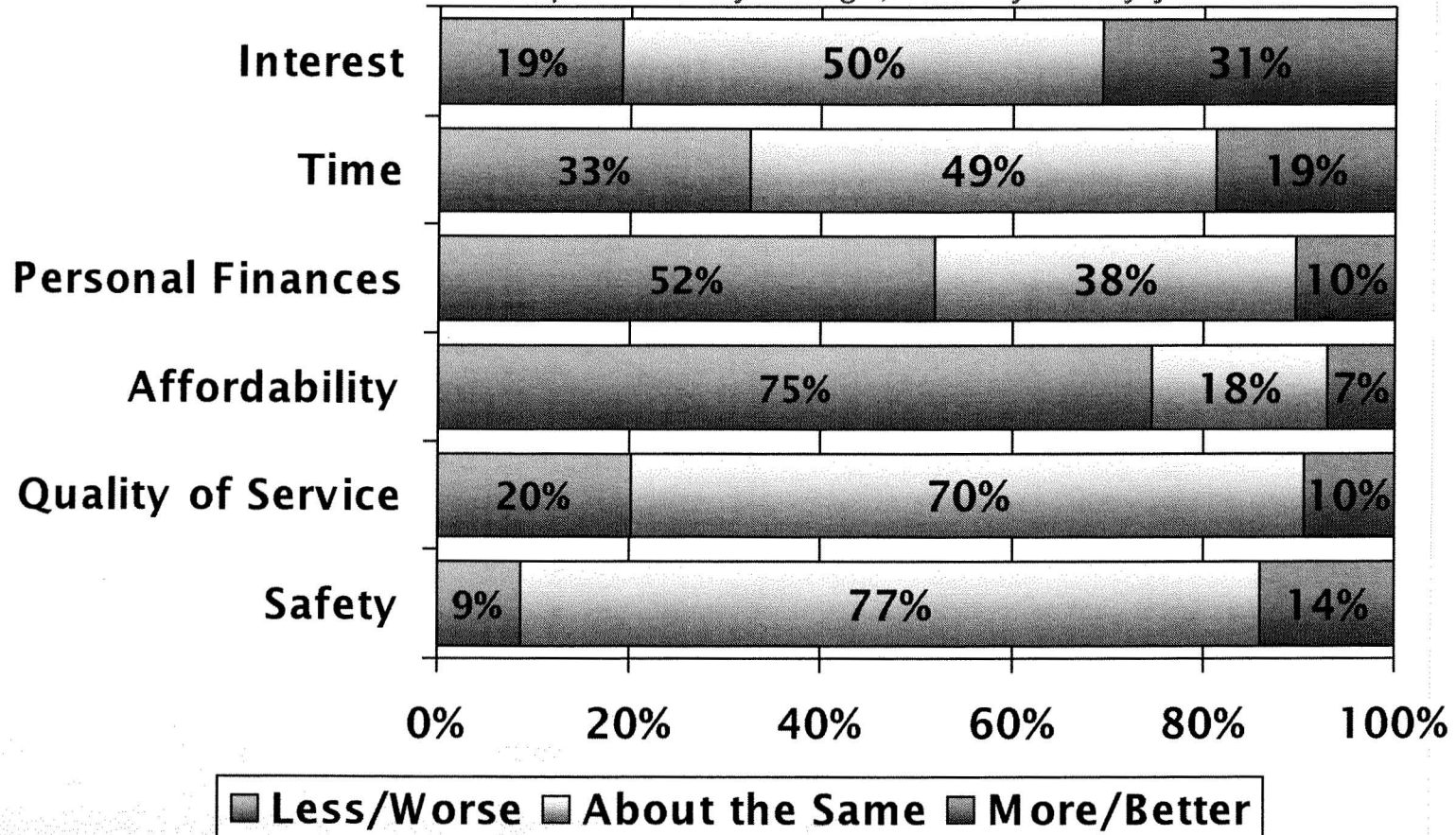


North America Leisure

Visitor Sentiment Q'4 2008

TIA Travel Sentiment: Air Leisure Travelers

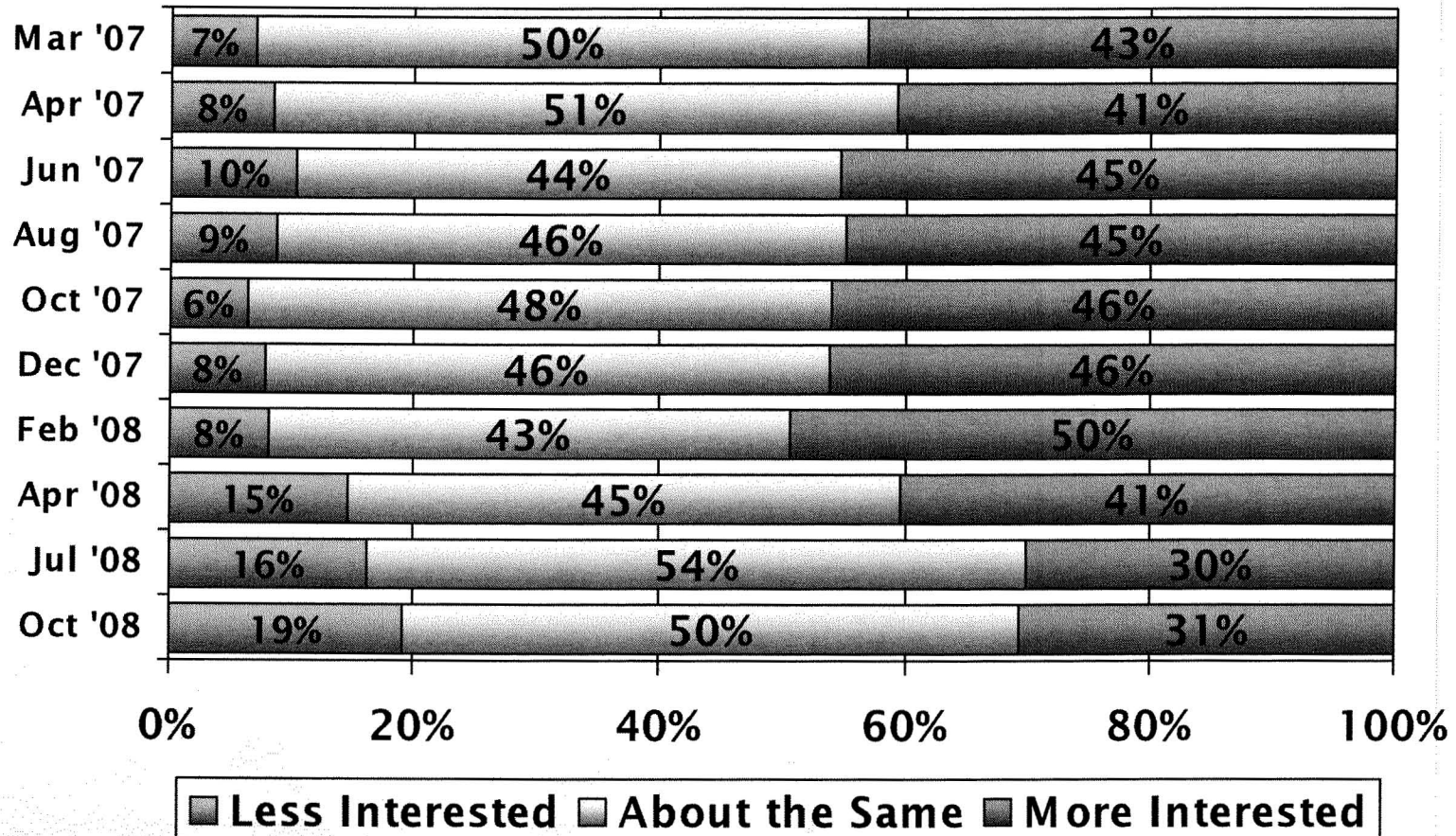
"Compared to a year ago, would you say you..."



Base: Air Leisure travelers

Source: Travel Industry Association, travelhorizons Survey – October 2008

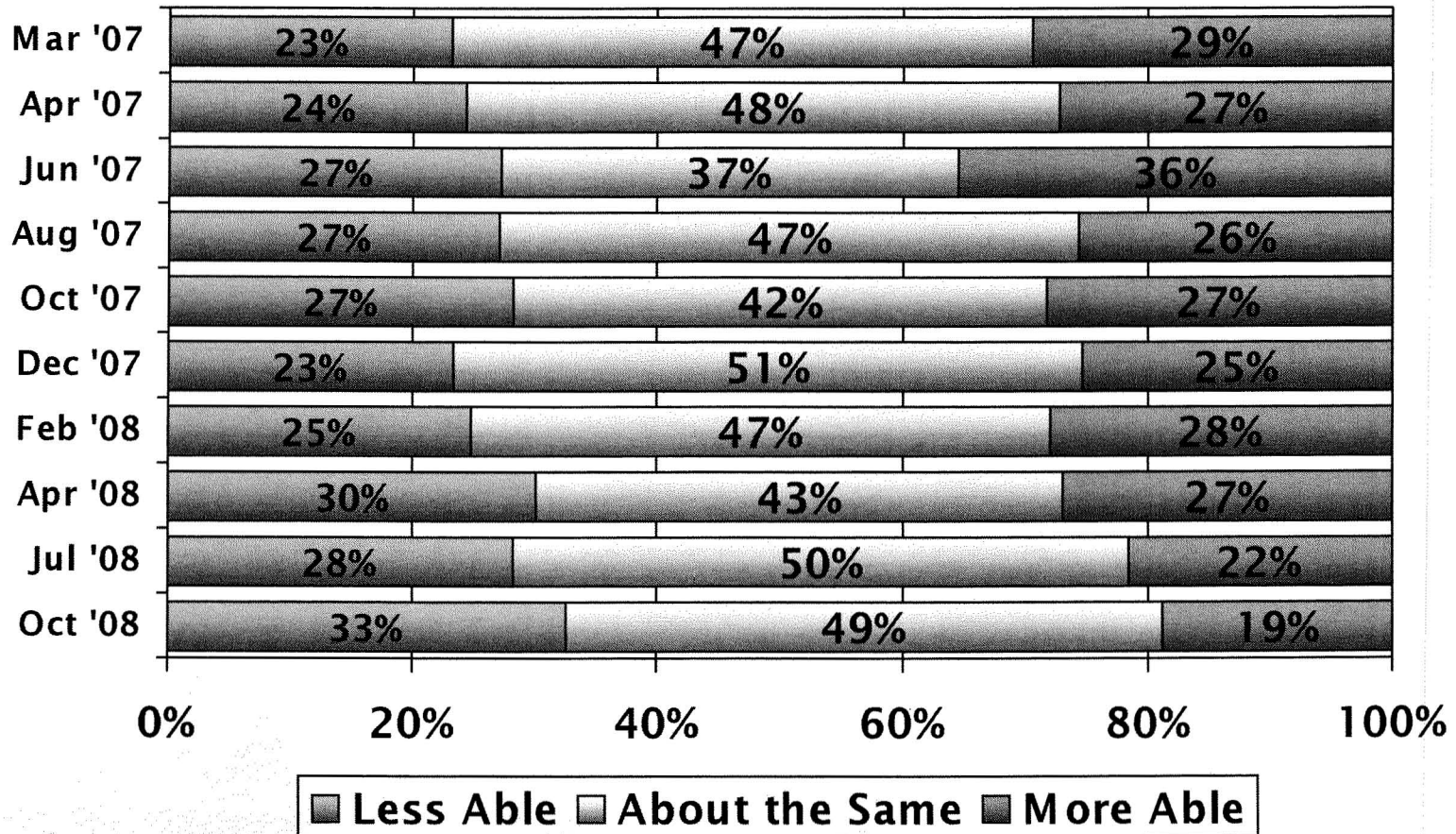
Air Travelers Travel Sentiment: Interest



Base: Air Leisure travelers

Source: Travel Industry Association, travelhorizons Survey – October 2008

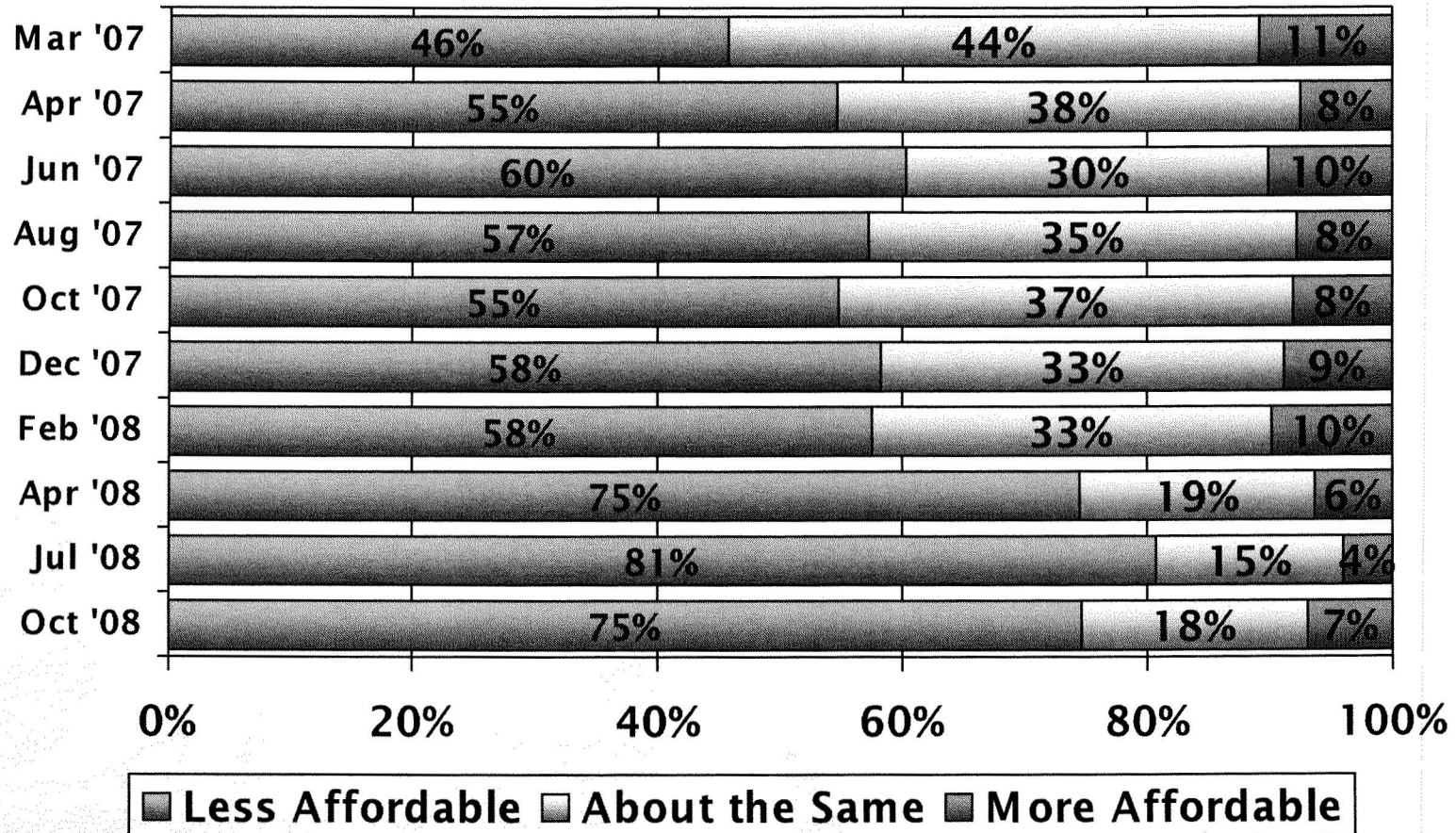
Air Travelers Travel Sentiment: Time



Base: Air Leisure travelers

Source: Travel Industry Association, travelhorizons Survey – October 2008

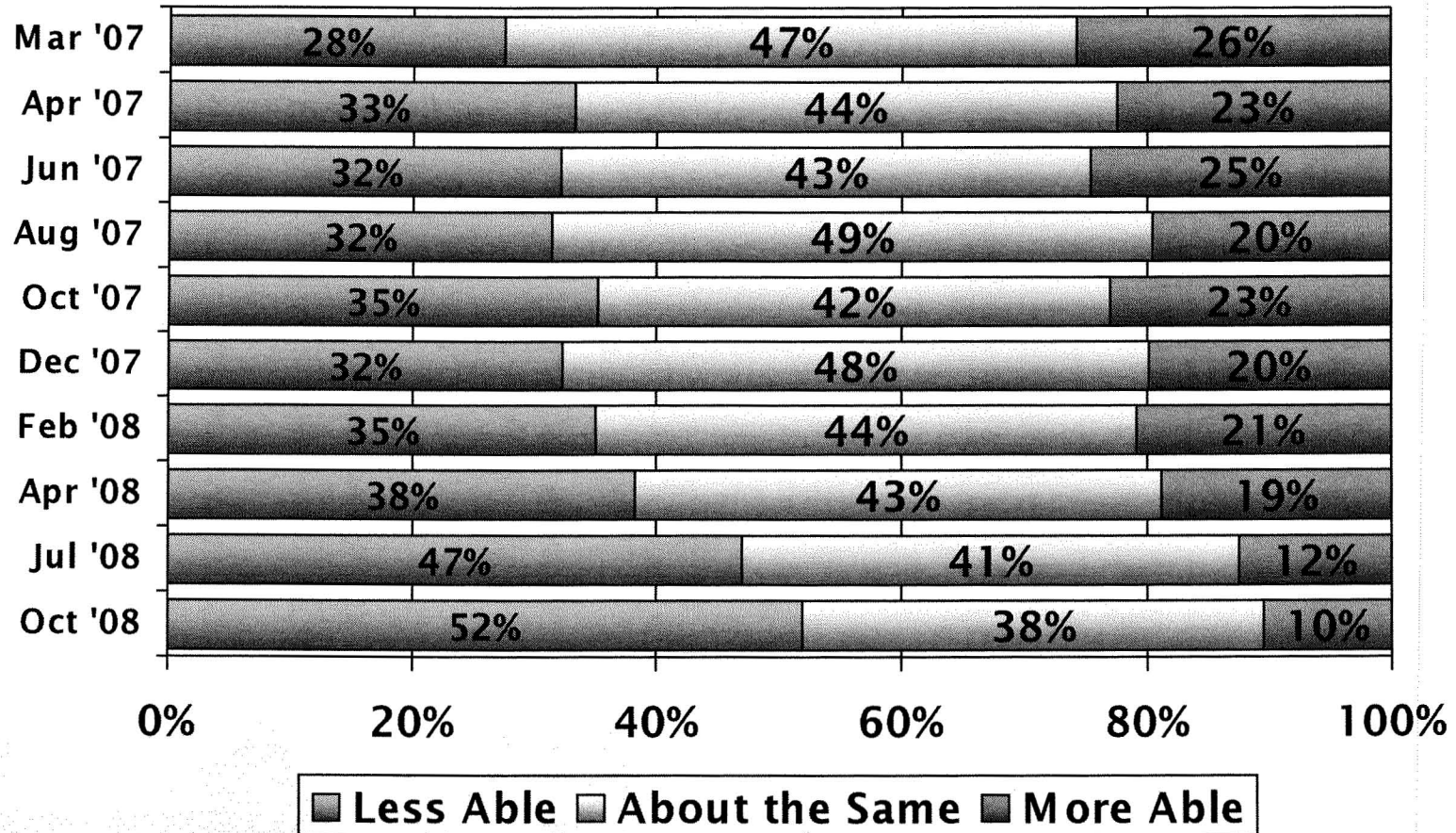
Air Travelers Travel Sentiment: Affordability



Base: Air Leisure travelers

Source: Travel Industry Association, travelhorizons Survey – October 2008

Air Travelers Travel Sentiment: Personal Finances



Base: Air Leisure travelers

Source: Travel Industry Association, travelhorizons Survey – October 2008

2009 Plan Adjustments

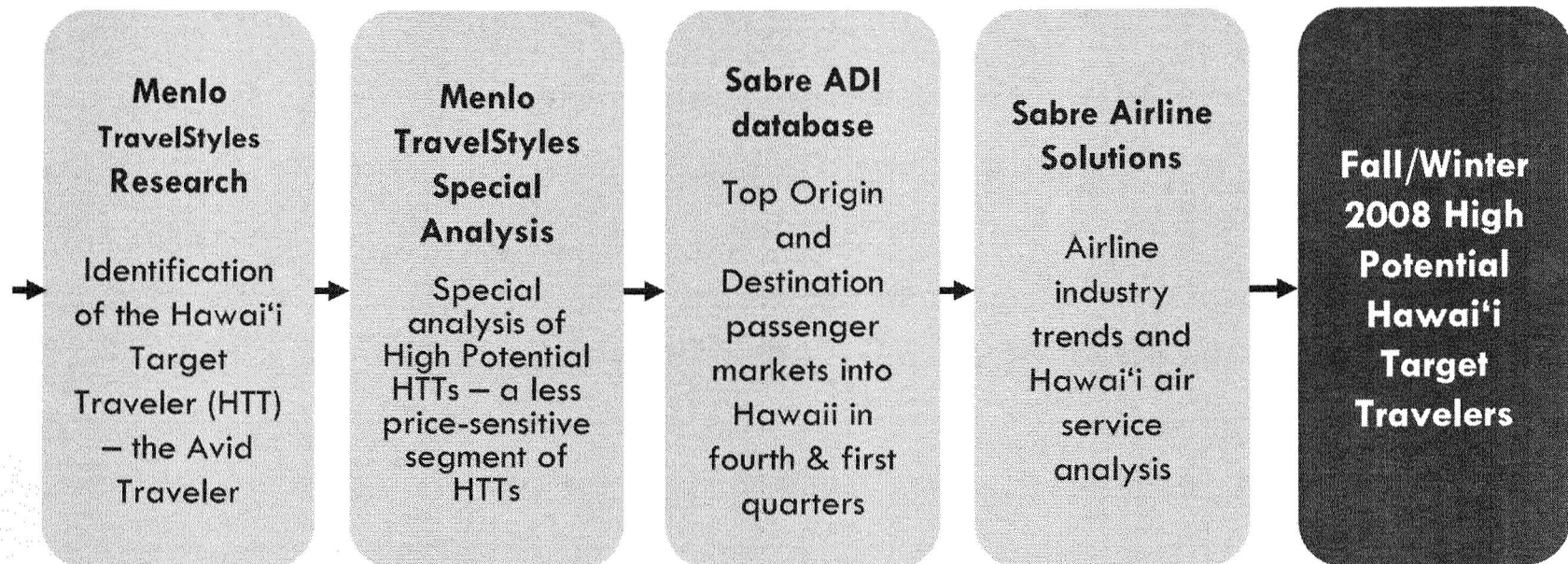
2009 Plan Adjustments

- **Focus**
 - HPHTT
- **Coordinate**
 - Further align marketing programs
- **Leverage**
 - Continue to leverage HTA assets with industry partners

2009 Plan Adjustments - Focus

High Potential Hawai'i Target Traveler (HPHTT) Audience

Target Audience: Research Overview



Special analysis of avid Hawai'i Target Traveler data to identify a less-price sensitive, higher-income segment of HTT's

Analysis of airline O&D passenger traffic, future booking pace, future capacity plans and airline industry insights

Optimal geographic target markets & traveler profiles

Target Markets

Air Service - Hub Source Markets:

- Finally, given airlines' expected renewed focus on hub routes, a final "filter" was added to identify which of the target markets were air carrier hubs (where efforts to stimulate traffic would therefore have the greatest likelihood of near-term success).
- Based on the preceding, the top target markets have been identified as:
 - Los Angeles
 - San Francisco
 - Seattle
 - Phoenix
 - Chicago
 - Denver
 - Dallas
 - New York

High Potential Hawai'i Target Traveler

2009 Plan Updates

Evaluation of Marketing Programs

- Magazine Advertising
- Online Media
- ABC/Disney CMMP

ABC Multi-Platform Components

Spot TV



ABC O&O
Affiliate Stations

New York
Los Angeles
Chicago
San Francisco
Dallas
Washington DC
Phoenix

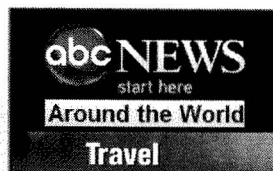
Online



ABC Full Episode
Player
(details follow)

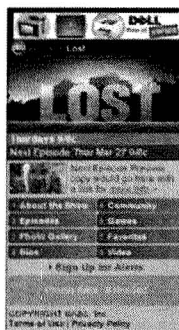


Local ABC Station
Sites

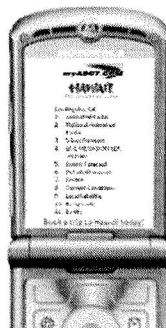


National
ABCNews.com

Mobile



National WAP
AT&T / Sprint
(details follow)



Local WAP
ABC O&O
Stations

Emerging



Hawaii Widget
(LOST sample
widget shown)

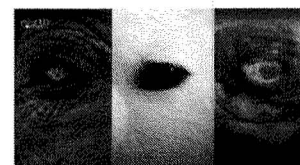
Brand
Integration



View From the Bay
San Francisco



190 North
Chicago



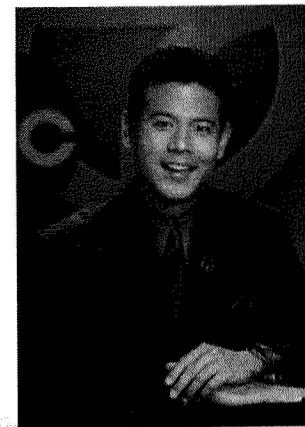
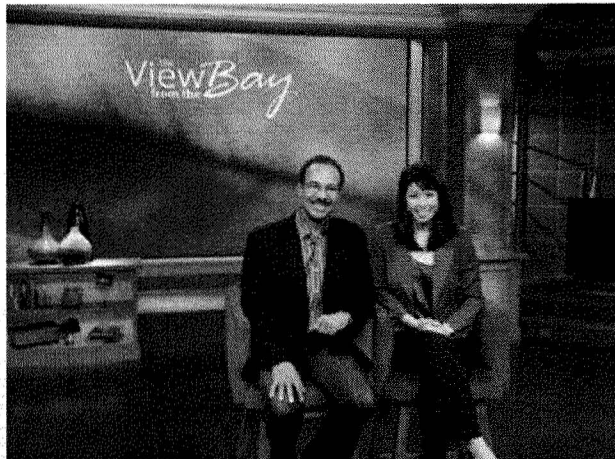
DisneyNature Films
Earth

HAWAII!
Visitors & Convention Bureau

High Potential Hawai'i Target Traveler

2009 Plan Updates

- **Celebrity-Led Media Tour**
 - Key Markets
- **Regional ABC Show Integration**
 - San Francisco – KGO-TV “View from the Bay”
 - Chicago – WLS-TV “190 North”



HAWAII
Visitors & Convention Bureau

High Potential Hawai'i Target Traveler

2009 Plan Updates

Wholesaler Co-op Programs:

- **Traditional Wholesalers**
- **Online Travel Agencies**
- **Airline Wholesalers**
- **Un-traditional**

High Potential Hawai'i Target Traveler

2009 Plan Updates

Wholesaler Co-op Programs:

- **Traditional Wholesaler**
 - **Developed cooperative marketing agreements**
 - **Increased focus on training**
 - **Increased island chapter coordination**

High Potential Hawai'i Target Traveler

2009 Plan Updates

Wholesaler Co-op Programs:

- **OTA's**
 - **Developed cooperative marketing agreements**
 - **Increased focus on training**
 - **Increased island chapter coordination**
 - **Developing coordinated consumer marketing**
 - **Travelocity**

High Potential Hawai'i Target Traveler

2009 Plan Updates

Wholesaler Co-op Programs:

- **Airline Wholesaler**
 - **Developed cooperative marketing agreements**
 - **Increased focus on e-marketing to their databases**

High Potential Hawai'i Target Traveler

2009 Plan Updates

Wholesaler Co-op Programs:

- **Un-traditional**
 - **Develop further leverage with existing and new partners**

High Potential Hawai'i Target Traveler

2009 Plan Updates

Partnerships:

- **American Express Corporate Partnership**
 - Travel Agency Network
 - Magazine Publishing Group
 - Credit Card Division

High Potential Hawai'i Target Traveler

2009 Plan Updates

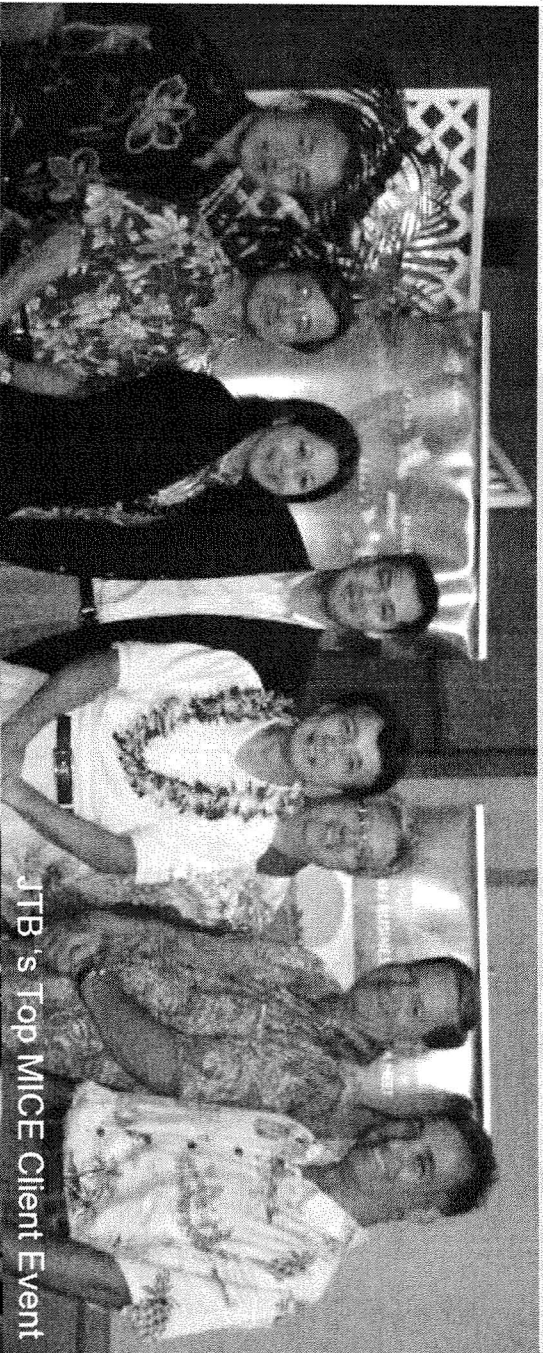
Partnerships:

- **Gateway Market Blitz**
 - Industry-wide effort

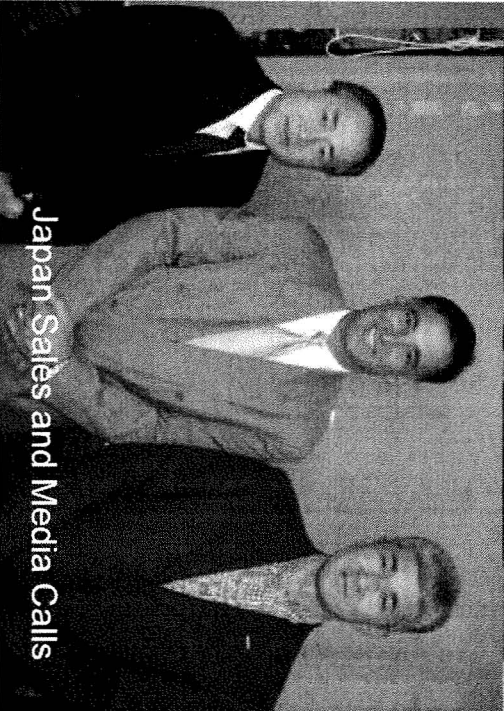
What's New for 2009

- **Incentive Market Emphasis**
 - Japan and Canada
- **Asia Business Expansion**
 - China
 - Korea
- **Activities/Attractions Added-Value Program**
 - Partnership with Retail Merchants of Hawaii and A3H Attraction Association
 - Hot Dates, Hot Rates 2009-2010 Program
 - Increased On-Line Marketing

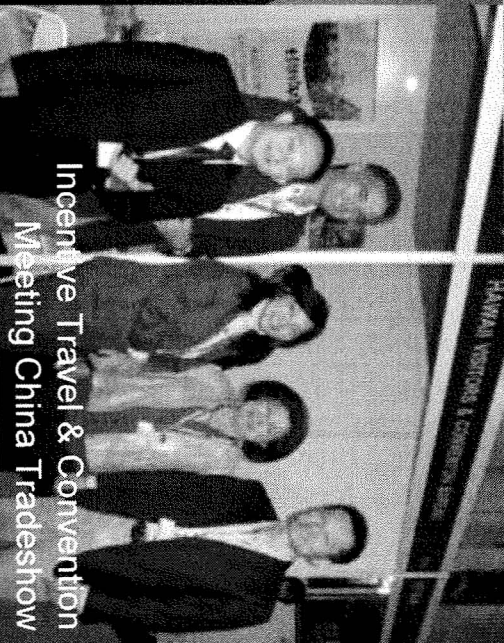
International Partnerships



JTB's Top MICE Client Event



Japan Sales and Media Calls



Incentive Travel & Convention Meeting China Tradeshow

International Partnerships



Asia Pacific Incentives and Meetings Expo

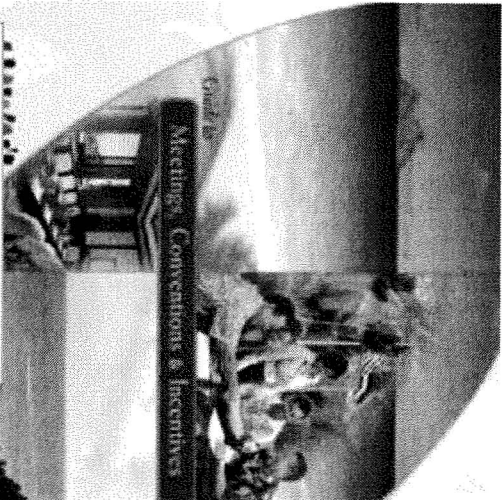


Corporate Education Philippines



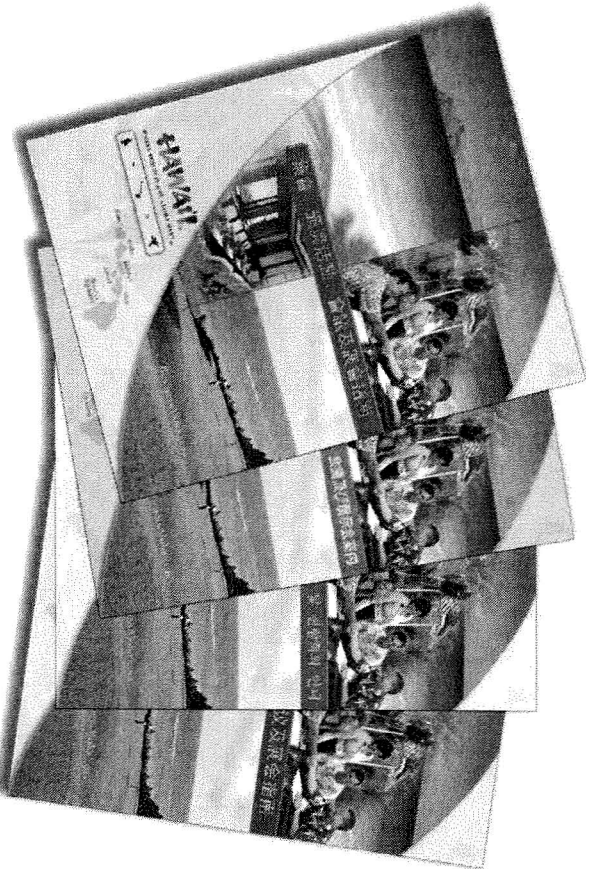
December 2008 Taipei Media Blitz

Business Marketing



Meetings, Conventions & Incentives

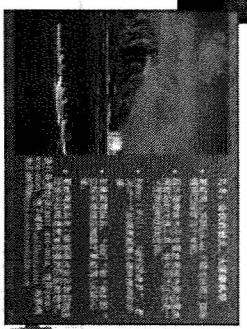
Let's face it, your potential meeting, trade show, incentive, or other business-related event is your most powerful marketing tool. It's a chance to meet face-to-face with your target audience, build relationships, and generate leads. At Hawaii Meetings, Conventions & Incentives, we help you plan and execute your event with confidence. Our experienced team provides expert advice on everything from venue selection to catering and transportation. Contact us today to learn more about our services and how we can help you make the most of your next business event.



Multi Language Meeting Planner Guides



Multi Language E-Initiatives

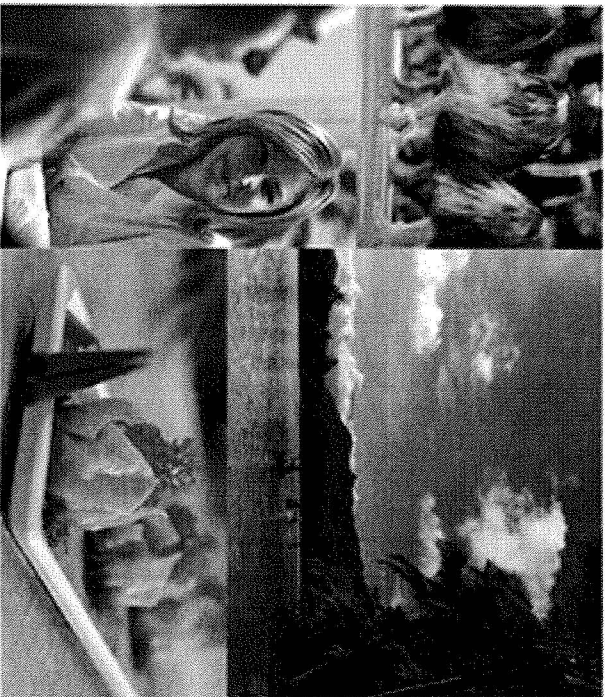


HAWAII.
Visitors & Convention Bureau

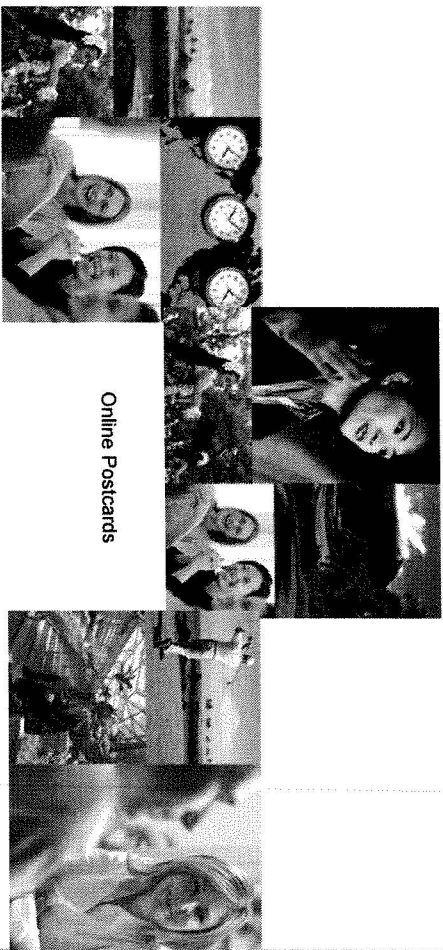
Business Marketing

Virtue is its own reward. But a trip to Hawaii is a better incentive.

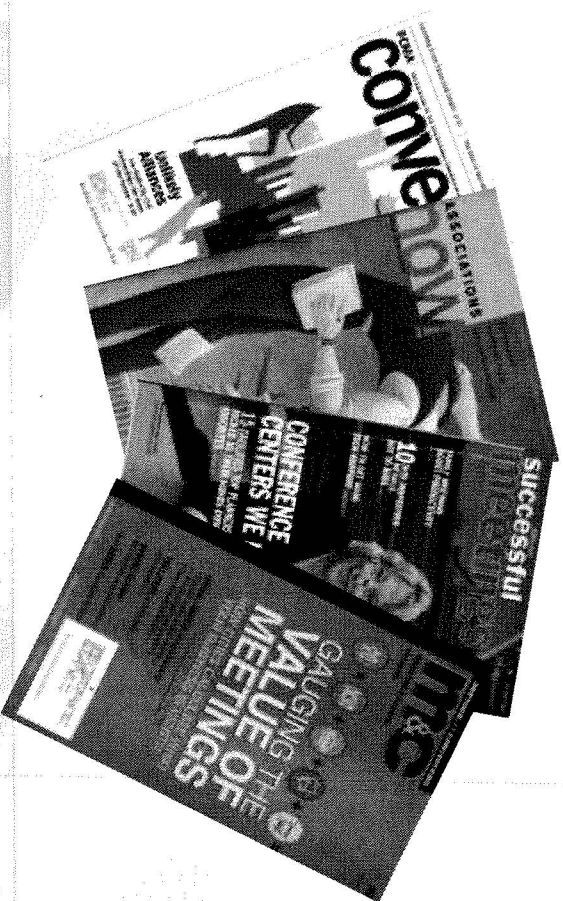
There's no better incentive than the prospect of a trip to the islands of Aiea. Why? Because no other place on earth inspires the imagination like Hawaii. For more information, visit BusinessAiea.com or call toll-free, 1-888-424-0554.



Print Ad



Online Postcards



Key CMI Trade Partners



Mahalo!

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VISITORS & CONVENTION BUREAU



SMG

HAWAII.



Hawai'i Convention Center
Presentation to the Legislature
January 30, 2009





Current Challenges

- Economy
- Air – Diminishing Seat Capacity
- Decrease in Meeting Attendance
- Increased Cost Competition
- Distance
- Boondoggle Perception





Hawaii Convention Center/SMG Sales and Marketing Team

North America

- East Coast
- Midwest
- North East
- West Coast

International

- Japan
- China





North America

- Direct Sales – Associations
- New Initiatives
 - Meeting Space Program
 - Developing Market – Tradeshow
- Business Ambassador Roundtables
- Key Industry Collaboration – PCMA





North America

Target Markets

- Trade, medical and professional organizations with emphasis on education
- National and International Industry conventions, trade shows and events.
- National and International Trade Show Production Companies with interests in the Pacific Rim



50th Promotion

50
HAS JUST BECOME
your LUCKY NUMBER

WE'RE CELEBRATING
50 YEARS OF STATEHOOD,
AND *you* GET TO PARTY
WITH AWESOME INCENTIVES!

GET AT LEAST:

- ◆ 50% Off of HCC Rental
(Maximum of \$100,000)
- ◆ 50 Roundtrip Airline Tickets
(Maximum of \$1,000 per ticket)
- ◆ \$50,000 in Destination Support
- ◆ \$50,000 in Promotional Support
(Global Outreach Program and Attendance Marketing)

HERE'S ALL YOU HAVE TO DO:

- There must be a signed agreement by December 31, 2009. Bring a minimum 3,000 attendees and have 1,200 peak room nights using at least two hotels.
- Must be held in calendar years 2011, 2012, 2016 or 2017
- Cannot be used together with any other offer

HAWAII
CONVENTION CENTER
Where BUSINESS and Aloha meet

Tel: Fax: 1-808-291-5403 • HCC Main Line: (808) 941-3530
email: info@hcc.hawaii.gov • hcc.hawaii.gov

NORTH AMERICA

Launched at PCMA Annual Meeting – January 2009

“Faced with a tough global market... [meeting] planners’ operational decision will be driven overwhelmingly by cost...”

Future Watch 2009



HTA Strategic Initiatives

- Create a “dual brand” for Hawai`i – a compelling business image coexists with Hawai`i’s successful leisure travel brand.
- Develop a brand image that portrays Hawai`i as a one-of-a-kind destination with a unique culture and a variety of experiences.
- Developing marketing programs that continue to attract first time visitors to Hawai`i.





Positioning Hawai`i

"The opportunity that Hawaii offered - to experience a variety of cultures in a climate of mutual respect - became an integral part of my world view, and a basis for the values that I hold most dear."

- Barack Obama





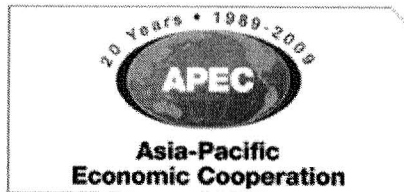
Hawai`i Represents...

*Diversity, inclusive host culture,
multi-cultures, life-balance,
rejuvenation...*

- Capitalize on Hawai`i's "**Global Advantage**"
– Crossroads of the Pacific
- Encourage development of first-time joint meetings between US & Asia organizations
- Focus on medical and professional meetings with global outreach needs



International Conferences



Asia Pacific Economic Cooperation
(20,000 delegates) – Potential for 2011



International Union for Conservation of Nature
(10,000 – 15,000 delegates) – Potential for 2012



Pacifichem 2010
(10,000+ delegates) – Definite for 2010



BUSINESS INITIATIVES



United States Department of Energy
Office of Public Affairs
Washington, DC 20585

NEWS MEDIA CONTACT:
Julie Ruggiero, (202) 586-4940

FOR IMMEDIATE RELEASE
Monday, January 28, 2008

U.S. Department of Energy and State of Hawaii Sign Agreement to Increase Clean Energy Technologies in Hawaii

DOE to support transformation of Hawaii's energy supply through Hawaii Clean Energy initiative

HONOLULU, HI –The U.S. Department of Energy (DOE) and the State of Hawaii today strengthened cooperation to implement clean energy technologies that will increase energy efficiency and maximize use of the State's vast and abundant renewable resources. DOE Assistant Secretary for Energy Efficiency and Renewable Energy Alexander Karsner and Hawaii Governor Linda Lingle signed a Memorandum of Understanding (MOU) establishing the Hawaii Clean Energy Initiative (HCEI), a long-term partnership designed to transform Hawaii's energy system to one that utilizes renewable energy and energy efficient technologies for a significant portion of its energy needs. The partnership aims to put Hawaii on a path to supply 70% of its energy needs using clean energy by 2030, which could reduce 72% of Hawaii's current crude oil consumption. This type of clean energy transformation will continue to help sharply reduce greenhouse gas emissions.

"Through this unique initiative, DOE is pleased to commit its technical and policy expertise and capabilities to help demonstrate reliable, affordable and clean energy technologies in Hawaii. With an abundance of natural resources and environmental treasures, Hawaii is the ideal location to showcase the broad benefits of renewable energy at work on an unprecedented scale," Assistant Secretary Karsner said. "Hawaii's success will serve as an integrated model and demonstration test bed for the United States and other island communities globally, many of which are just beginning the transition to a clean energy economy."

"This innovative, unprecedented partnership builds on the progress the state has made to increase energy independence by decreasing Hawaii's reliance on imported oil," said Governor Lingle, who previewed the historic agreement last week in her State of the State Address. "Our Islands' abundant natural sources of energy, combined with the considerable capabilities of the Department of Energy will help Hawaii lead America in utilizing clean, renewable energy technologies."

As a leader in clean energy technologies, DOE will work with Hawaii to further the potential of its natural resources, including wind, sun and bioenergy resources. DOE will immediately engage experts in clean energy technology development to help Hawaii to launch several projects with public and private sector partners that target early opportunities and critical needs for Hawaii's transition to a clean energy economy, including:

- Designing cost-effective approaches for the exclusive use of renewable energy on smaller islands;
- Designing systems to improve stability of electric grids operating with variable generating sources, such as wind power plants on the islands of Hawaii and Maui;
- Minimizing energy use while maximizing energy efficiency and renewable energy technologies at new large military housing developments;
- Expanding Hawaii's capability to use locally grown crops and byproducts for producing fuel and electricity; and
- Assisting in the development of comprehensive energy regulatory and policy frameworks for promoting clean energy technology use.

This cooperation between DOE and the State of Hawaii continues the work of President Bush's Advanced Energy Initiative, which aims to identify clean energy solutions for the entire nation, set the U.S. on the path to greater energy security and reduce our dependence on foreign oil.

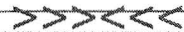
- US Department of Energy Letter
- HCC building highlights
- Attract programs like: US-China Green Business Exchange
- China and India – Growth - Working with other SMG properties
- Going forward – Highlight Green





Attendance Building

- Impact the short-term numbers for 2009
- Maintain number of delegates from the US
- Develop or increase delegates from new global markets





Key Market - North America

Global Outreach Program is designed to:

- Attract the US medical, dental and technology conventions to Hawai`i
 - Designed to overcome objections of boondoggle
 - Offset objection of distance – center of the Pacific





Global Outreach

Meeting Globalization Trends

- 22.9% increase of international attendance at US medical conventions – (*Healthcare Conventions & Exhibitors Association 2008*)
- 38% say the increase in their medical specialty area is growing faster outside the US - (*Healthcare Conventions & Exhibitors Association 2008*)
- 20% of *MPI/American Express Future Watch* Respondents expect to extend their global reach in 2008.





Global Outreach

Top Five International Growth Markets for US Medical Meetings

- 1) China
- 2) Canada/Japan (tie)
- 3) United Kingdom
- 4) United Kingdom
- 5) South Korea






2009 – Year of the Dentists

- Attendance Building
 - ADA – San Antonio – Record pre-registration
 - Japan Dental Show – 60,000 delegates/ 1 every 4 years
 - South China Dental Show – Guangzhou – 50,000 delegates
 - Dentech Expo (China) – Beijing – 50,000 delegates
 - Assisted in Europe
 - Denmark
 - Germany – Largest European Dental Show
 - Brazil – Sao Paulo – 60,000 delegates
 - Mexico



AACD – American Academy of Cosmetic Dentistry



AMERICAN ACADEMY OF COSMETIC DENTISTRY
EXCELLENCE IN COSMETIC DENTISTRY 2009






開催日: 2009年4月27日～5月1日
主催: アメリカ美容歯科学院

2009年4月27日～5月1日にハワイのホノルルで開催される米美容歯科学院 (AACD) 25周年記念セッション「EXCELLENCE IN COSMETIC DENTISTRY 2009 (2009年 美容歯科学院の卓越)」の開催を喜ばれることを光栄に存じます。美容歯科学院は25年を振り返るなか、歯科医や歯技師にとって、国際的な先進的な歯科教育を追求することはますます不可欠です。世界各所の歯科医が一堂に集ってライブセミナーセッションを共有し、世界中からのお客様が最新の美容歯科の最新トレンドをAACDの目標です。全世界のAACDメンバーが揃って25周年を祝うにあたり、ホノルルは申し分ない舞台といえるでしょう。

カンファレンスの開催受付は2009年5月18日、コース開始は2009年12月8日に始まります。グローバルを体験するための、25周年記念セッションの会から2日間の特別なグローバルフォーラムを開催いたします。このフォーラムには、美容歯科学院および美容歯科学院の会費で名高い講師の方々が参加しております。またこの期間セッションに登場する講師と、歯科医に接する経験・友人としてお互いに関係を築かなくてはならないと考えております。

Wishing
25周年AACD会費
Mickey Demaria, DDS

主催講師陣

Darin Adair, DDS Naoki Aiba, CDT Galip Goral, DDS John Kels, DMD Wynn Okuda, DMD

その他の講師陣
Barry Polansky, DMD • Stephen Chu, DMD • Richard Simonson, DDS • William Strupp, DDS
各講師のスケジュールはこちらをご覧ください

グローバルフォーラム-2日間の教育プログラム

参加費および受講料 受講料: \$75米ドル
受講料に含まれるもの

- ・ 朝食2回
- ・ 昼食1回
- ・ 講演会参加費および昼食券
- ・ インターナショナルセミナーへの登録

ホテルについて

ヒルトンハワイアンビレッジ
料金は1泊210米ドルより
(必要に応じて追加されます)
学期セッション期間に関する詳細は
www.aacd.comをご覧ください

新刊誌
AACD学術セッションでは毎年、新刊誌をインターネットセッションにご提供いたします。世界各所の講師やセミナーメンバースと交流する、AACD新刊誌の会費、全世界のAACDメンバーとの関係構築の場としてください。

ご依頼・お問い合せはハワイ、カンパニオン・センター日本語事務局まで
担当 久美
電話: 03-9404-2988 ファックス: 03-9904-2990 メールアドレス: j3@nda@nccomg.com

25周年を祝して * www.aacd.com * +1.608.222.8583

お客様の向上 ビジネスの発展 視野の拡大



Where Business and Aloha Meet

EXCELLENCE IN COSMETIC DENTISTRY 2009

CELEBRATING 25 YEARS OF EXCELLENCE

27 - ANNUAL AACD SYMPOSIUM • HONOLULU, HAWAII, APRIL 27 - FRIDAY, MAY 1, 2009

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Scientific Program

Exhibits

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Request a Letter of invitation

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日本語
한국어
中文简体

Welcome

Aloha and welcome to the 25th Anniversary American Academy of Cosmetic Dentistry (AACD) Scientific Session, Excellence in Cosmetic Dentistry 2009, taking place in Honolulu, Hawaii, from Monday, April 27 - Friday, May 1, 2009.

As cosmetic dentistry continues to evolve at a rapid pace it is more essential than ever for dentists and laboratory technicians to seek out progressive dental education on an international level. For 25 years, the AACD has been fine-tuning its scientific session in order to provide dental professionals with the quality AACD education they have come to expect.

Hawaii Highlights

Music

Hawaii's music roots are in Hawaiian folk music such as mele (chant or song) meant for the highly ritualized hula. Chanting was often accompanied by heavy rhythmic sounds of the ipu heke (double gourd drum) or ulu'ulu (feathered gourd rattles). The mainstream sounds of slack-key guitar and faiso to singing immigrated to Hawaii with Mexican and Spanish cowboys called paniolos. Portuguese sailors brought the ukulele (jumping flea), named for the quick finger techniques used to play it. A little known fact is that Hawaii made a major contribution to Nashville with the

Back Next

Contact Us

phone: +1.608.222.8583
fax: +1.608.222.9540
email: info@aacd.com
address: 5401 World Dairy Drive
Madison, Wisconsin 53718
USA

FLYER FOR DENTTECH 2008~SHANGHAI, CHINA

美国美容牙科科学会第25届科学会议——
“卓越的牙科美容2009”

2009年4月27日—5月1日，预计参会人数：3200人



aacd.hawaiiiconvention.com

会议主要内容包括世界知名的专家进行教学演讲，通过课程和深入的动手实践，介绍美容牙科最新的临床技术。同时还有行业内最新、最大的产品、服务展览。

美国美容牙科科学会 (American Academy of Cosmetic Dentistry, AACD) 成立于1984年，是世界最大的专业美容牙科组织，拥有来自70个国家和地区8000多名会员。AACD的目标是提高美容牙科的技术和科研水平，促进提升医疗水平和责任感。

参会费用：975美元
费用包括：两天大陆式早餐，两天展厅内午餐，参观展览，开放式临床演讲和实践培训，参加国际招待会

美国儿童牙科科学会第62届年会

2009年5月21日—5月24日，预计参会人数：2500人

aaapl.hawaiiiconvention.com



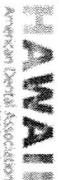
会议内容包括专业课程，世界知名的专家演讲以及行业展览。

美国儿童牙科科学会 (American Academy of Pediatric Dentistry, AAPD) 成立于1947年，是一个儿童牙科领域的，非盈利性的组织。它拥有7300名会员，主要是口腔医护人员，为婴儿、儿童、青少年和其它人群提供各种专业的口腔医疗服务。AAPD制定和推广有实际根据的法规和指导意见，鼓励研发，帮助儿童口腔健康相关的学术研究，培训和教育医护人员、法规制定者和普通大众来促进儿童的口腔健康。

美国牙科协会第50届年会

2009年10月11日—10月14日

ada.hawaiiiconvention.com



会议内容包括临床、研究、学术和产业知名人士主持的教育课程和演讲，现场治疗技术展示，最新的牙科产品和服务展览。

美国牙科协会 (American Dental Association, ADA) 成立于1859年，历任主席有143位，每位都代表着行业内某方面的翘楚。如今ADA拥有世界各地的会员15.6万人，它致力于通过倡导、教育、科研和制定标准，来提高大众的口腔健康和专业的医疗水平。



如果您需要关于这三次会议的信息，
可以访问其网站。
您也可以向本宣传页背面标明的夏威夷
会展中心中国办事处联系。

特别声明

夏威夷会展中心是夏威夷州政府的下属机构，
我们并不从您的参会费用中收取任何佣金或
其它利益。我们尽量提供准确的会展信息，
但是我们不能保证所有的信息完全精确。
请巴士主办方发布的官方网站。

夏威夷会展中心 您举办会议和公司活动的理想所在！

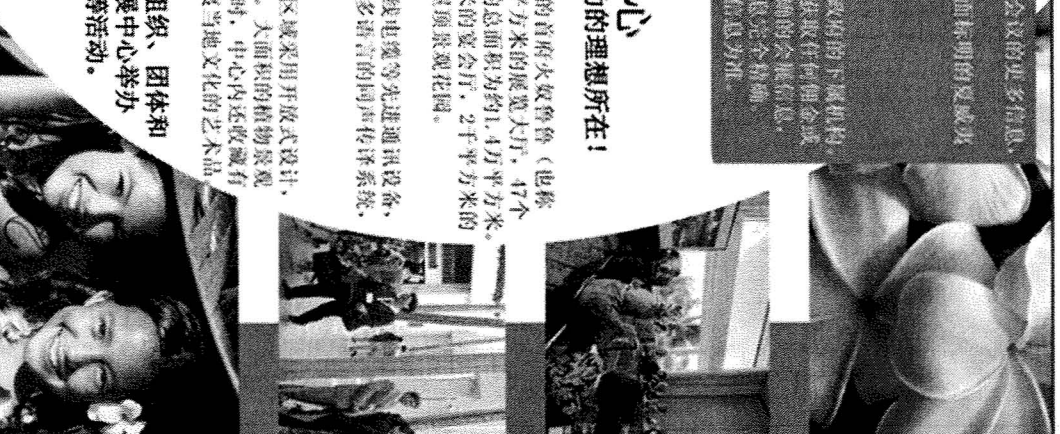
中心位于美国夏威夷州的首府火奴鲁鲁 (也称檀香山)，拥有超过8.5万平方米的展览大厅，47个会议室和2个剧场。会议室的总面积为约1.4万平方米。此外，中心还拥有3千平方米的宴会厅，2千平方米的专业厨房，和1万平方米的绿草景观花园。

中心内铺设有光纤和有线电缆等先进通讯设备，在所有主要会议室均配有多种语言的同声传译系统，并可以连接互联网。

中心的功能空间相同地区域采用开放式设计，充分利用自然风来调节温度。大面积的植物景观成为建筑整体的一部分。同时，中心内还收藏有价值2百万美元，反应夏威夷当地文化的艺术品。

众多世界知名的协会、组织、团体和企业都选择在夏威夷会展中心举办会议、奖励旅游、宴会等活动。

我们也欢迎您的到来！





2009 Year of the Dentists

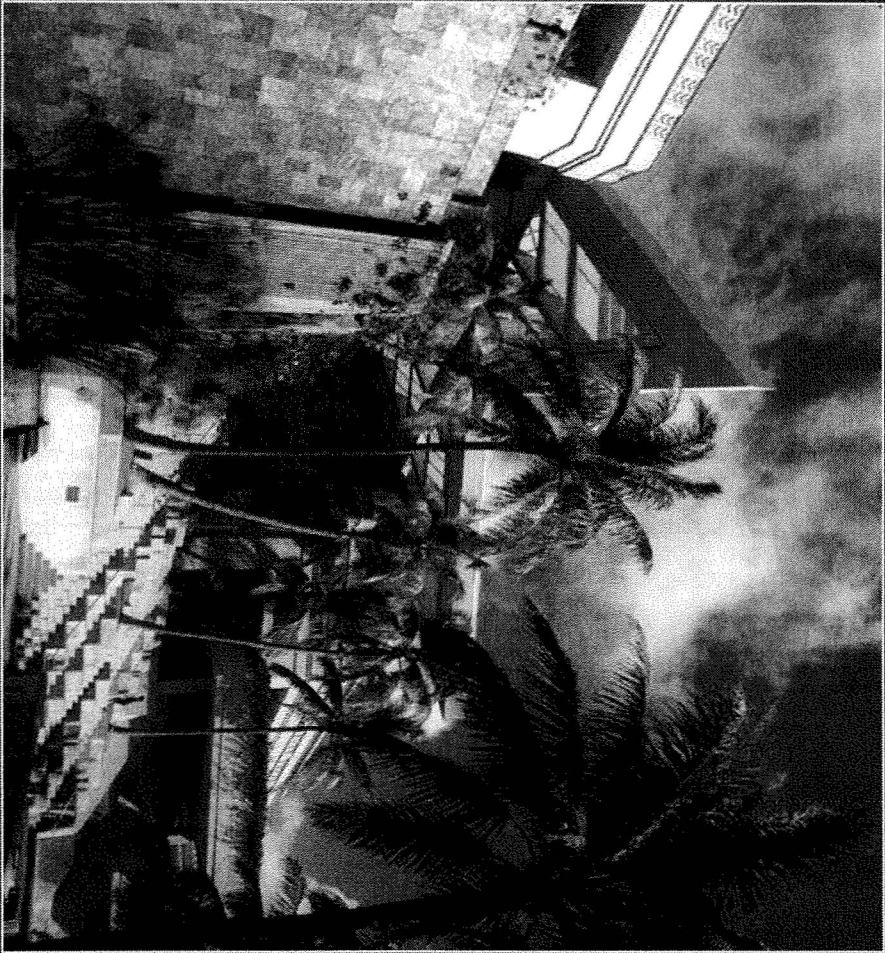
Goal –

- To maintain attendance at projected levels
- no decrease
- 10% of the total attendance from
international markets



Hawai`i Convention Center – 2009 Bookings

<u>Event Name</u>	<u>Event Type</u>	<u>Start</u>	<u>End</u>	<u>Delegate</u>	<u>Rm. Nights</u> <u>x 8.04</u> <u>Oahu</u>
Total Definite Bookings for 2008:			40	77,968	428,753
International Group 2009	Banquet III	1/15/09	1/15/09	1,000	1,500
International Group 2009	Meeting I	1/18/09	1/18/09	300	450
2009 CCME Annual Conference	Meeting II	1/26/09	1/28/09	680	5,467
International Group 2009	Banquet III	1/31/09	1/31/09	1,500	2,250
ABC 2009 National Craft Championships	Convention	2/25/09	2/27/09	2,000	16,080
AAGP 2009 Annual Meeting	Convention	3/1/09	3/10/09	1,500	12,060
International Group 2009	Public/Gated	3/11/09	3/16/09	3,500	5,250
International Group 2009	Convention	3/12/09	3/14/09	1,500	1,250
International Group 2009	Meeting I	4/5/09	4/3/09	500	750
ISMRM Seventeenth Scientific Meeting and Exhibition	Convention	4/17/09	4/23/09	4,500	36,180
AACD 2009 Scientific Session	Convention	4/25/09	5/3/09	3,205	25,768
MLA 2009 Annual Meeting & Exhibits	Meeting II	5/14/09	5/20/09	2,300	18,492
62nd AAPD Annual Session	Meeting II	5/19/09	5/25/09	2,500	20,100
International Group 2009	Meeting II	5/23/09	5/23/09	4,000	6,000
Civil, Mechanical, & Manufacturing Innovation Grantees & Research Conference	Meeting II	6/22/09	6/27/09	2,500	20,100
ASPB 2009 Convention	Convention	7/18/09	7/22/09	2,000	16,080
150th ADA Annual Session	Convention	9/30/09	10/3/09	40,000	321,600
IREM-CCIM Success Series 2009	Meeting II	10/9/09	10/18/09	1,400	11,256
ASHG 2009 Annual Meeting	Convention	10/20/09	10/24/09	6,000	48,240
NACAS 41st Annual Conference	Convention	11/7/09	11/11/09	1,100	8,844
Jehovah's Witnesses 2009 International Convention-Group 1	Convention	11/17/09	11/23/09	9,500	76,380
Jehovah's Witnesses 2009 International Convention-Group 1 NI	Convention	11/17/09	11/23/09	1,100	4,400
Jehovah's Witnesses 2009 International Convention-Group 2	Convention	11/24/09	11/30/09	9,500	76,380
Jehovah's Witnesses 2009 International Convention-Group 2 NI	Convention	11/24/09	11/30/09	1,100	4,400
NAIC 2009 National Winter Meeting	Convention	12/2/09	12/8/09	2,100	16,884
Total Definite Bookings for 2009:			23	105,285	756,161



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HAWAII CONVENTION CENTER
Where BUSINESS and ALOHA Meet





Japan

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Key Factors Affecting Japan Marketplace

- Strength of the Yen
- Decrease in fuel prices
- Two, 5-day holidays in Spring and Autumn



Japan Market Standing

Hawai'i: Most Desirable Overseas Destination

<u>2002</u>		<u>2004</u>		<u>2006</u>	
1.	Hokkaido	1.	Hokkaido	1.	Hokkaido 13.16%
2.	Chiba	2.	Okinawa	2.	Hawai'i 5.51%
3.	Kyoto	3.	Hawai'i	3.	Okinawa 5.20%
4.	Hawai'i	4.	Kyoto	4.	Kyoto 5.07%
5.	Nagano	5.	Nagano	5.	Nagano 3.96%
11.	U.S.A.	8.	U.S.A.	9.	U.S.A. 2.88%
14.	Canada	10.	Italy	10.	Italy 2.51%
15.	Italy	14.	Canada	13.	China 1.56%
16.	Australia	16.	France	16.	France 1.48%
20.	Europe	18.	China	18.	Europe 1.43%
23.	China	20.	Europe	21.	Korea 1.28%
24.	Switzerland	21.	Switzerland	22.	Canada 1.26%
25.	France	24.	Korea	23.	Australia 1.24%
28.	Guam	25.	Guam	27.	Egypt 1.00%
		26.	Australia	30.	Guam 0.84%

JTB "Most Desirable Overseas Destinations" surveyed every two years.

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Japan Market Standing

Hawai'i: Most Preferred Overseas Destination

Preferred Destinations (multiple answer survey)

Hawai'i maintained its #1 ranking from 2005-2008

	<u>2007</u>		<u>2008</u>
➤ No. 1 Hawai'i	49.8%	↑	58.6%
➤ No. 2 Australia	48.9%	↑	51.8%
➤ No. 3 Italy	43.8%	↓	43.4%

Most Desired Destinations (single answer survey)

Hawai'i has been the most preferred destination for 11 consecutive years with a widening gap between #2 Australia

	<u>2007</u>		<u>2008</u>
➤ No. 1 Hawai'i	18.0%	↑	19.6%
➤ No. 2 Australia	9.5%	↓	8.5%
➤ No. 3 France	7.2%	↓	6.7%



Japan Market Trends Travel Preferences

Special Interest Tours (SIT)

- 67.7% UNESCO World Heritage
- 55.7% Eco-tour
- 52.0% Relaxation tour
- 45.7% Long-stay tour
- 42.4% Healthcare tour

Golf Tours

- 30.4% Hawai'i
- 21.7% Hokkaido
- 6.5% Miyazaki
- 3.3% Okinawa
- 3.3% Guam

* JTB Travel Trend 2007

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2005-2008 Marketing Taglines

Discover Aloha & So Much More Hawai'i

Discover Aloha

+



からだで、こころで、もっと感じるハワイ。

So Much More Hawai'i

www.gohawaii.jp



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2009 Marketing Tagline **My Anniversary Hawai'i**

Hawai'i In My Life
My Anniversary Hawai'i

Hawai'i Statehood
50th Anniversary



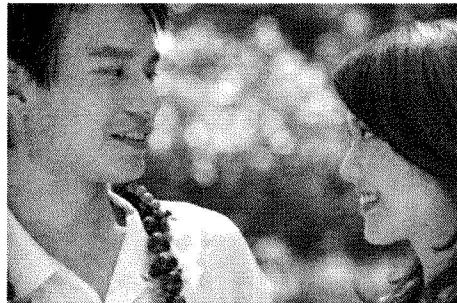
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Target Markets High-End Experiential Travelers

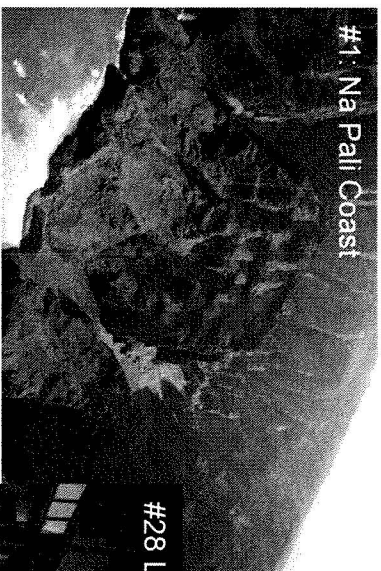
- **Romance:** Weddings, Honeymoons, Vow Renewals
- **Multigenerational Families:** Baby's First Trip, Reunions
- **Active Seniors:** Retirement, Birthdays, Anniversaries





Consumer Marketing
Hawai'i 50 Select Campaign

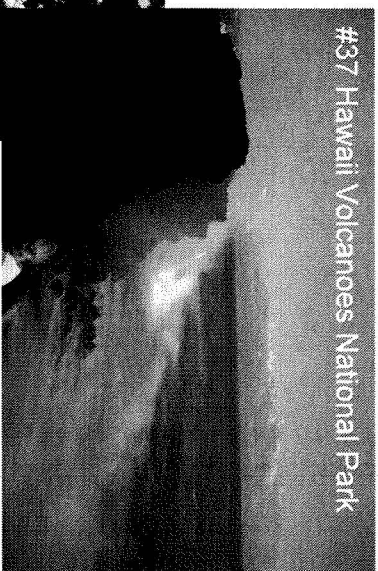
ハワイ
Hawai'i 50 選



#1: Na Pali Coast



#28 Lahaina

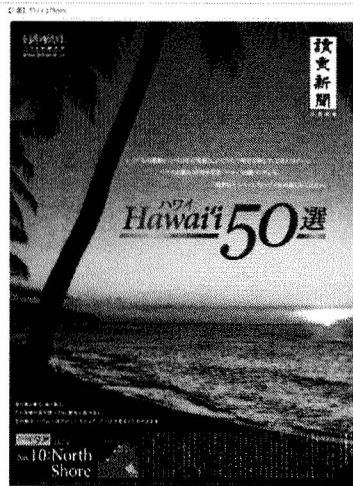


#37 Hawaii Volcanoes National Park

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Consumer Marketing Panorama Ad Campaign

- Date: Nov. 29, 2008 (Sat)
- Newspaper: Asahi Shimbun & Yomiuri Shimbun
- Circulation: 550,000 select households
- Demographic: High-income families in the Tokyo & Osaka areas
- Feature: Hawai'i 50 Select, Mahalo Campaign, Governor's message, four travel partner ads



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Consumer Marketing **Promotional Events**

Universal Studios Japan Discover Aloha Festival

- Dates: July 28 – August 2, 2009 (school break)
- Location: Osaka, Japan
- Target: 30,000 pax / weekday
50,000 pax / weekend
- Event: Hawaiian Festival to include (tentative):
 - Hawai'i travel promotions via marketing partners
 - Hawaiian entertainment & parade
 - Hawaiian food booths

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Trade Marketing Promotional Campaigns

Hawai'i Wedding 2009 Campaign

- Dates: Fall 2009
- Target: Wedding Couples & Families
- Reach: Total: 10,000 Incremental Visitors
1,000 wedding couples x 10 wedding party members
- Program: Provide travel wedding service, shopping and other incentives to wedding couples
- Purpose: Encourage couples to select Hawai'i over competing destinations for their wedding destination

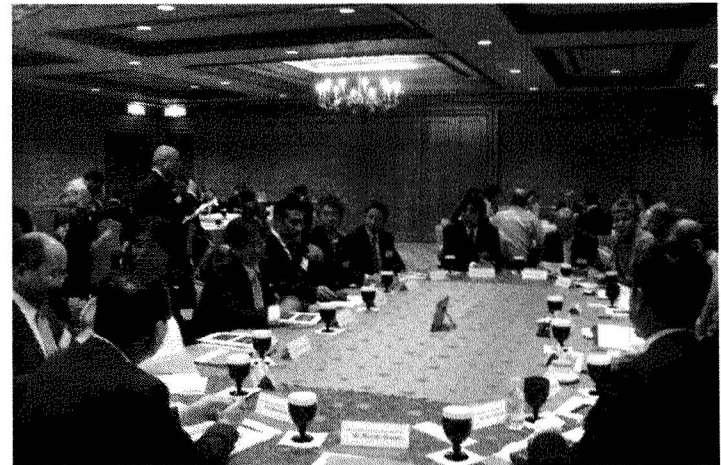


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Trade Marketing Japan-Hawai'i Tourism Council

- Members: 60 Travel Trade Partners from Japan & Hawai'i
- Committees: Airlift
Hospitality
Marketing
MICE
- Meetings: May 2009 (Hawai'i)
September 2009 (Japan)



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Developing International Markets

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Key Factors Affecting Asia Marketplace

- Visa Waiver Program
- U.S. – China Tourism MOU

Examples of Asia Marketing Initiatives

Korea

- Romance / Honeymoon
- Educational Seminar
- Online Marketing
- Webinar

China

- Training Programs
- Group Travel Market
- MICE Travel Market
- Chinese Style Wedding/Honeymoon Group to Hawai'i



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Key Factors Affecting Oceania Marketplace

- Low interest rates
- Airlines are adjusting to market factors
- Consumer Optimism



Examples of Oceania Marketing Initiatives

- VIVA Holidays Big Bang Sale
- Flight Center Coop campaign
- Aloha Down Under
- 50 Unique Experiences



Key Factors Affecting the European Marketplace

- Strength of the Euro
- Demand remains strong in Germany
- Demand is starting to slow in the UK
- Airlines may come up with competitive priced rates



Examples of Europe Marketing Initiatives

- Aloha Up N Over
- Agent & Media FAM
- Securing media coverage and keeping the press updated about the islands

