

LATE TESTIMONY

FINTestimony

From: mailinglist@capitol.hawaii.gov
Sent: Wednesday, March 09, 2011 9:11 AM
To: FINTestimony
Cc: kaukamau@yahoo.com
Subject: Testimony for HB200 on 3/9/2011 10:00:00 AM

Testimony for FIN 3/9/2011 10:00:00 AM HB200

Conference room: 308
Testifier position: support
Testifier will be present: No
Submitted by: Marjorie Mau
Organization: Individual
Address:
Phone:
E-mail: kaukamau@yahoo.com
Submitted on: 3/9/2011

Comments:

I strongly support HB200 - because I believe it provides opportunities for education - especially for Native Hawaiians. As the first tenured professor of Native Hawaiian Health at JABSOM - I know how important it is to grow our own - and to prepare for the next generation. Our efforts at the Dept of Native Hawaiian Health - the first of its kind in ANY US accredited medical school system dedicated to indigenous health --- is living proof that when you provide us with opportunity we make good on our promises. All leadership positions in our DNHH are kanaka maoli. Ee! Please support this bill and build a brighter future for our homeland. Aloha ke akua,



UNIVERSITY
of HAWAII®
MĀNOA

March 9, 2011

LATE TESTIMONY

To Whom It May Concern:

This is a letter of support for HB200. As the Director of the Imi Ho'ola Post-Baccalaureate Program and the Native Hawaiian Center of Excellence at the John A. Burns School of Medicine (JABSOM), I fully support this funding that would provide sustainability to these 2 key diversity and healthcare workforce building programs.

Imi Ho'ola has over 30 years of history producing physicians from disadvantaged backgrounds that go on to serve in underserved, rural communities. To date, the program has graduated 213 individuals who are currently enrolled or have graduated from JABSOM. Of our graduates, 79% choose primary care as their practice specialty and 40% are Native Hawaiian (NH).

The Native Hawaiian Center of Excellence's mission is to improve the health of Native Hawaiians (NH) by increasing under-represented minorities, specifically Native Hawaiians in medicine. COE has been in existence for 15 years and was recently refunded by HRSA in 2009. We work hand in hand with the Imi Ho'ola Program as a pipeline program to diversify the healthcare workforce. Our activities include increasing the competitiveness of our NH students applying to medical school, NH medical student retention, student and faculty health disparities research, cultural competency development, and Native Hawaiian and JABSOM faculty development.

To advocate for our program faculty, staff, and students who are served in our programs, I submit this letter of support.

Sincerely,

Winona K. Lee, MD
Director
Imi Ho'ola Post-Baccalaureate Program
Native Hawaiian Center of Excellence

677 Ala Moana Boulevard, Suite 1016B
Honolulu, Hawaii 96813
Telephone: (808) 587-8570
Fax: (808) 587-8565

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FINTestimony

From: mailinglist@capitol.hawaii.gov
Sent: Wednesday, March 09, 2011 9:17 AM
To: FINTestimony
Cc: rcuizon@hawaii.edu
Subject: Testimony for HB200 on 3/9/2011 10:00:00 AM

Testimony for FIN 3/9/2011 10:00:00 AM HB200

Conference room: 308
Testifier position: support
Testifier will be present: No
Submitted by: RENA CUIZON-GARCIA
Organization: Individual
Address:
Phone:
E-mail: rcuizon@hawaii.edu
Submitted on: 3/9/2011

LATE TESTIMONY

Comments:

FINTestimony

From: mailinglist@capitol.hawaii.gov
Sent: Wednesday, March 09, 2011 9:24 AM
To: FINTestimony
Cc: kataoka@hawaii.edu
Subject: Testimony for HB200 on 3/9/2011 10:00:00 AM

LATE TESTIMONY

Testimony for FIN 3/9/2011 10:00:00 AM HB200

Conference room: 308
Testifier position: support
Testifier will be present: No
Submitted by: Sheri Koike
Organization: Individual
Address:
Phone:
E-mail: kataoka@hawaii.edu
Submitted on: 3/9/2011

Comments:

FINTestimony

From: mailinglist@capitol.hawaii.gov
Sent: Wednesday, March 09, 2011 9:25 AM
To: FINTestimony
Cc: kliumd@gmail.com
Subject: Testimony for HB200 on 3/9/2011 10:00:00 AM

Testimony for FIN 3/9/2011 10:00:00 AM HB200

Conference room: 308
Testifier position: support
Testifier will be present: No
Submitted by: Kawika Liu
Organization: Individual
Address:
Phone:
E-mail: kliumd@gmail.com
Submitted on: 3/9/2011

LATE TESTIMONY

Comments:

FINTestimony

From: mailinglist@capitol.hawaii.gov
Sent: Wednesday, March 09, 2011 8:50 AM
To: FINTestimony
Cc: wizner@hawaii.edu
Subject: Testimony for HB200 on 3/9/2011 10:00:00 AM

LATE TESTIMONY

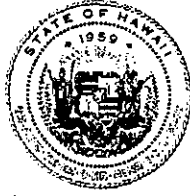
Testimony for FIN 3/9/2011 10:00:00 AM HB200

Conference room: 308
Testifier position: support
Testifier will be present: No
Submitted by: Kerri Wizner
Organization: Individual
Address:
Phone:
E-mail: wizner@hawaii.edu
Submitted on: 3/9/2011

Comments:

LATE TESTIMONY

NEIL ABERCROMBIE
GOVERNOR OF HAWAII



LORETTA J. FUDDY, A.C.S.W., M.P.H.
INTERIM DIRECTOR OF HEALTH

STATE OF HAWAII
DEPARTMENT OF HEALTH
P.O. Box 3378
HONOLULU, HAWAII 96801-3378

In reply, please refer to:
File:

**House Committee on Finance
HB 200, Relating to the State Budget
Testimony of Loretta J. Fuddy, A.C.S.W., M.P.H.
Interim Director of Health**

March 9, 2011

1 **Department's Position:** The department strongly supports this measure.

2 **Fiscal Implications:** The Department continues to struggle with the repercussions from the State's
3 economic downturn which is one of the biggest challenges that the Department has faced in over a
4 decade. In the recent Reduction in Force (RIF) the DOH lost 315 positions and therefore lost a critical
5 mass of the health workforce that made our mission possible. The Department and its programs and their
6 contracted service providers have had to make many difficult decisions in order to operate with
7 significantly less human and financial resources.

8
9 We continue to focus our efforts on maintaining and sustaining the overall health of our state in the most
10 efficient and cost-effective manner given the limited resources that we have. Programs and their staff
11 have been asked to do more with less and to look at ways of meeting objectives by refining existing
12 procedures and operations as well as seeking new and innovative ways of doing business to achieve
13 more efficient and effective outcomes.

14

15 **Purpose and Justification:**

16 The Department's Executive Biennium Budget for FB 2011-13 reflects mostly housekeeping actions:

- Numerous trade-off/transfers from Other Current Expenses and Equipment to Personal Services within the base allocation to cover payroll costs;
- Deletion of unfunded positions, including those RIF positions whose permanent counts and temporary FTEs were restored by Act 180/SLH 2010 with no funding attached;
- Adjustments in federal fund ceilings to reflect new grant awards or terminations of grant awards.

In addition, the Department is requesting additional general funds to restore funds due to the decrease in the Federal Medical Assistance Percentage (FMAP) for various DOH Divisions, additional funds for the Early Intervention Services (EIS) program, restoration of funding for two Deputy Directors through internal trade-off/transfer actions, and funding for the implementation of the civil unions law.

The Department is requesting \$15,672,621 for FY 12 and \$17,079,692 for FY 13 in additional general funds to restore funds due to the decrease in the Federal Medical Assistance Percentage (FMAP) for the Adult Mental Health, Developmental Disabilities and the Child and Adolescent Mental Health Divisions.

Effective July 1, 2011 the FMAP will decrease to 51.79%, thereby increasing the State's required match for the various services provided by these divisions. The FMAP is currently 67.35% and will decrease to 64.35% for the period January to March 2011, and 62.35% for the period April to June 2011.

The Department is also requesting an additional \$2,124,192 in general funds for each year of the FY 11-13 for the EIS program due to the delayed implementation of the amended eligibility requirements for

1 IDEA, Part C. These amendments may result in a decreased number of infants and toddlers with
2 developmental delay who will be eligible to receive early intervention services.

3
4 Further, the Department is requesting to restore \$323,503 in funding for two deputy directors and their
5 private secretaries through general-funded trade-off/transfers since these positions are critical to ensure
6 the continued efficient operations of a department as large as the DOH. Act 180, SLH 2010 deleted
7 funding for two deputy directors, namely the Deputy Director of Health and the Deputy Director for
8 Health Resources Administration, as well as the funding for their private secretaries. Also, the
9 Department is requesting two permanent position counts through trade-off/transfers for the HRA Deputy
10 Director and private secretary since the budget act also deleted those position counts.

11
12 With the enactment of Act 1/SLH 2011, the Office of Health Status Monitoring is responsible for the
13 administration and issuance of civil union licenses for the state. The DOH is requesting three permanent
14 general-funded positions and \$192,121 for FY 12 and \$181,121 for FY 13 to address the workload
15 requirements for this new program.

16
17 Lastly, the Department requests five special-funded Sanitarian positions and \$310,842 for FY 12 and
18 \$305,842 for FY 13 to help inspect Hawaii's food establishments in a more timely manner in order to
19 ensure the health and safety of Hawaii's residents and tourists. These positions will be funded by the
20 Sanitation and Environmental Health Special Fund.

21
22 Thank you for the opportunity to testify.

FINTestimony

From: mailinglist@capitol.hawaii.gov
Sent: Wednesday, March 09, 2011 8:51 AM
To: FINTestimony
Cc: monaann@hawaii.edu
Subject: Testimony for HB200 on 3/9/2011 10:00:00 AM

LATE TESTIMONY

Testimony for FIN 3/9/2011 10:00:00 AM HB200

Conference room: 308
Testifier position: support
Testifier will be present: No
Submitted by: Mona Cardejon
Organization: Dept. of Native Hawaiian Health
Address:
Phone:
E-mail: monaann@hawaii.edu
Submitted on: 3/9/2011

Comments:



Papa Ola Lokahi
Nana I Ka Pono Na Ma

Papa Ola Lokahi
894 Queen Street
Honolulu, Hawaii 96813

Phone: 808.597.6550 • Facsimile: 808.597.6551

LATE TESTIMONY

Papa Ola Lokahi

is a non-profit Native Hawaiian organization founded in 1988 for the purpose of improving the health and well-being of Native Hawaiians and other native peoples of the Pacific and continental United States.

Board of Directors

Member Organizations

Hoola Lahui Hawaii

Hui No Ke Ola Pono

Hui Malama Ola Na OIwi

ALU LIKE

Ke Ola Mamo

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University of Hawaii

Hawaii State Department of Health

Na Puuwa'i

Office of Hawaiian Affairs

Ex-Officio Members

Hawaii Primary Care Association

Ke Alaula

Executive Director

Hardy Spoehr

TESTIMONY: HB 200, Relating to the state Budget

HOUSE COMMITTEE ON FINANCE

Rep. Marcus R. Oshiro, Chair

Rep. Marilyn B. Lee, Vice Chair

Hardy Spoehr, Executive Director

Wednesday, March 9, 2011

10:00am

Conference Room 308

State Capitol

Aloha Chair Oshiro, Vice Chair Lee and Members of the House Committees on Finance. Papa Ola Lokahi (POL) strongly supports this measure.

The measure supports numerous programs focusing on improving and health, sciences, and education of Native Hawaiians and all who call Hawai'i home. State support is critical to the work that is being done in medicine, nursing, social work, education, and language at the University of Hawai'i at Manoa and at Hilo.

We ask that you provide the administration your support, particularly as all Native Hawaiian federal resources are threatened with complete elimination.

Thank you for the opportunity to provide testimony on this important measure.

LATE TESTIMONY

FINTestimony

From: mailinglist@capitol.hawaii.gov
Sent: Wednesday, March 09, 2011 9:51 AM
To: FINTestimony
Cc: martinak@hawaii.rr.com
Subject: Testimony for HB200 on 3/9/2011 10:00:00 AM

Testimony for FIN 3/9/2011 10:00:00 AM HB200

Conference room: 308
Testifier position: support
Testifier will be present: No
Submitted by: Martina Kamaka
Organization: Individual
Address:
Phone:
E-mail: martinak@hawaii.rr.com
Submitted on: 3/9/2011

Comments:

FINTestimony

From: mailinglist@capitol.hawaii.gov
Sent: Wednesday, March 09, 2011 9:48 AM
To: FINTestimony
Cc: kimnb99@hotmail.com
Subject: Testimony for HB200 on 3/9/2011 10:00:00 AM

Testimony for FIN 3/9/2011 10:00:00 AM HB200

Conference room: 308
Testifier position: support
Testifier will be present: No
Submitted by: Kim Yamauchi
Organization: Individual
Address:
Phone:
E-mail: kimnb99@hotmail.com
Submitted on: 3/9/2011

LATE TESTIMONY

Comments:

FINTestimony

From: mailinglist@capitol.hawaii.gov
Sent: Wednesday, March 09, 2011 9:46 AM
To: FINTestimony
Cc: amolina@hawaii.edu
Subject: Testimony for HB200 on 3/9/2011 10:00:00 AM

Testimony for FIN 3/9/2011 10:00:00 AM HB200

Conference room: 308
Testifier position: support
Testifier will be present: No
Submitted by: ANNA MOLINA ACEBO
Organization: Individual
Address:
Phone:
E-mail: amolina@hawaii.edu
Submitted on: 3/9/2011

Comments:

LATE TESTIMONY

The Honorable Marcus R. Oshiro
House Committee on Finance
Twenty-Sixth Legislature
State Capitol
State of Hawaii
Honolulu, Hawaii 96813

LATE TESTIMONY

Dear Representative Oshiro Members of the Committee:

SUBJECT: HB 200-RELATING TO THE STATE THE BUDGET

My name is Louise Lar Emery. Thank you for the opportunity to tell you that I am in strong support of HB 200 specifically under Program ID HTH 501-Developmental Disabilities (DD). I am also in strong support of DD Division's request for additional funds of \$9.9 million for FY 2012 and an additional \$11.2 million for FY 2013 which will restore general funds to the DD Home and Community Based Services Medicaid Waiver Program budget. These additional amounts are necessary to cover the decrease in the Federal Medical Assistance Percentage (FMAP) and are the minimum amounts to maintain the current level of services being provided under the program.

I can testify how the Department of Developmental Disabilities has serviced my severely mentally challenged brother through THE ARC IN HAWAII (The Association for Retarded Citizens).

Department of Developmental Disabilities Division's support for ARC enabled outstanding services for individuals like my brother.

I, myself, have witnessed how Paul William Lar developed from a "vegetated" passive individual to an individual of his own right. THE ARC IN HAWAII made it possible for Paul and other "Special People" like himself to become communicative to the "normal" world and to educate the public to accept and to become aware of individuals with their disabilities.. How impressive it is how many of our "Special People" are out in the work world being productive citizens in our community.

THE ARC IN HAWAII is a shining example of how our society cares for the individual, especially those who are profoundly handicapped and disabled.

The society we live in shows care and concern for the individual.
Doesn't that reflect how our American Society is superior over other societies?

I wish to thank the House Committee on Finance for hearing the bill and request to please support it.

Sincerely,
Louise Lar Emery

FINTestimony

From: mailinglist@capitol.hawaii.gov
Sent: Wednesday, March 09, 2011 10:31 AM
To: FINTestimony
Cc: dr.sasha.fernandes@gmail.com
Subject: Testimony for HB200 on 3/9/2011 10:00:00 AM

Testimony for FIN 3/9/2011 10:00:00 AM HB200

LATE TESTIMONY

Conference room: 308
Testifier position: support
Testifier will be present: No
Submitted by: Dr Sasha Fernandes
Organization: Individual
Address:
Phone:
E-mail: dr.sasha.fernandes@gmail.com
Submitted on: 3/9/2011

Comments:

To our Hawaii government and US government officials:

Please show your strong support for HB200 to fund programs that serve Native Hawaiians. Native Hawaiians have higher rates of Diabetes and other illnesses than other ethnic groups. We need program like Imi Ho'ola and Native Hawaiian Center of Excellence at Dept NH Health at JABSOM and other programs for Native Hawaiians to address these health inequalities. We need more NH health professionals and others to work in medically underserved areas like Waianae, North Shore, and the Neighbor Islands.

Without these NH programs, the health inequalities will deepen and NH will have increased illnesses. Our NH programs cut down on healthcare costs by addressing the health needs of the NH community.

Thank you,
Sasha Fernandes, MD

FINTestimony

From: mailinglist@capitol.hawaii.gov
Sent: Wednesday, March 09, 2011 10:39 AM
To: FINTestimony
Cc: Eurosports63@yahoo.com
Subject: Testimony for HB200 on 3/9/2011 10:00:00 AM

Testimony for FIN 3/9/2011 10:00:00 AM HB200

Conference room: 308
Testifier position: support
Testifier will be present: No
Submitted by: Eugene Caputo Jr
Organization: Individual
Address:
Phone:
E-mail: Eurosports63@yahoo.com
Submitted on: 3/9/2011

LATE TESTIMONY

Comments:

Please vote to support HB200 to fund Programs that serve Native Hawaiians. Thank you.

LATE TESTIMONY

FINTestimony

From: mailinglist@capitol.hawaii.gov
Sent: Wednesday, March 09, 2011 10:43 AM
To: FINTestimony
Cc: kelyt@aol.com
Subject: Testimony for HB200 on 3/9/2011 10:00:00 AM

Testimony for FIN 3/9/2011 10:00:00 AM HB200

Conference room: 308
Testifier position: support
Testifier will be present: No
Submitted by: Lorayne Treschuk
Organization: Individual
Address:
Phone:
E-mail: kelyt@aol.com
Submitted on: 3/9/2011

Comments:
Please vote to support funding for Native Hawaiian programs.

Thank you.

LATE TESTIMONY

FINTestimony

From: mailinglist@capitol.hawaii.gov
Sent: Wednesday, March 09, 2011 10:47 AM
To: FINTestimony
Cc: move2thegroove@yahoo.com
Subject: Testimony for HB200 on 3/9/2011 10:00:00 AM

Testimony for FIN 3/9/2011 10:00:00 AM HB200

Conference room: 308
Testifier position: support
Testifier will be present: No
Submitted by: Chiyoko Miyabara
Organization: Individual
Address:
Phone:
E-mail: move2thegroove@yahoo.com
Submitted on: 3/9/2011

Comments:

Please vote to support funding for Native Hawaiian Programs. Mahalo.

FINTestimony

From: mailinglist@capitol.hawaii.gov
Sent: Wednesday, March 09, 2011 11:04 AM
To: FINTestimony
Cc: rtyama9@yahoo.com
Subject: Testimony for HB200 on 3/9/2011 10:00:00 AM

Testimony for FIN 3/9/2011 10:00:00 AM HB200

Conference room: 308
Testifier position: support
Testifier will be present: No
Submitted by: Ryan Yamauchi
Organization: Individual
Address:
Phone:
E-mail: rtyama9@yahoo.com
Submitted on: 3/9/2011

LATE TESTIMONY

Comments:

To Fin member
From Mike

SPRING MARKETING UPDATE

Presented by:
David Uchiyama
Vice President, Brand Management
Hawai'i Tourism Authority



HTA 2011 REVISED TARGETS: Visitor Arrivals

Arrivals	2009 Final		2010 Target Original		2010 Preliminary		2011 Target (Revised 1/21/2011)		Difference from 2011 Target to 2010 Preliminary
		% Change		% Change from 2009 Final		% Change from 2009 Final		% Change from 2010 Preliminary	
TOTAL	6,517,054	-4.5%	6,717,280	3.1%	7,084,528	8.7%	7,289,897	2.9%	206,171
US West	2,718,818	-1.8%	2,800,000	3.0%	2,959,116	8.8%	3,010,434	1.7%	51,318
US East	1,581,488	-7.2%	1,505,000	-3.8%	1,630,857	4.4%	1,654,594	1.5%	23,737
Japan	1,188,080	-0.6%	1,175,000	-0.6%	1,229,762	5.3%	1,255,605	2.1%	25,843
Canada	346,583	-3.8%	343,000	-1.0%	398,002	14.5%	406,029	2.3%	9,127
Asia	110,380	-1.9%	151,104	48.0%	181,721	64.8%	226,168	24.5%	44,447
China	41,924	-22.7%	73,404	75.1%	88,047	57.5%	82,140	-24.4%	18,099
Korea	51,353	34.7%	66,000	28.5%	88,860	69.1%	115,225	32.7%	28,365
Other Asia*	17,101	-15.4%	21,700	26.9%	28,814	68.5%	28,797	-0.1%	(17)
Oceania	136,717	-12.1%	165,215	20.8%	172,962	26.5%	188,000	8.7%	15,038
Europe	104,403	-9.4%	110,000	5.4%	109,245	-4.6%	110,802	1.4%	1,557
Other	274,000	-20.1%	342,981	25.2%	302,008	10.2%	319,035	5.8%	17,027
TOTAL (AIR)	6,426,448	-4.4%	6,602,280	2.8%	6,982,573	8.8%	7,170,668	2.7%	188,095
Cruise	96,808	-11.8%	115,000	19.0%	101,955	5.5%	119,028	18.7%	17,078

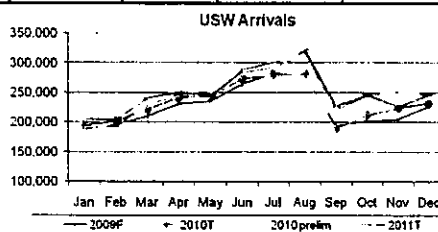


MARKET OUTLOOK: US WEST

	2010 Target		2010 Preliminary		2011 Target	
		% Change		% Change		% Change
Arrivals	2,800,000	3.0%	2,959,116	8.8%	3,010,434	1.7%
PPPD\$	\$ 138.0	3.5%	\$ 142.3	6.8%	\$ 146.4	2.9%
Length of Stay	9.60	0.7%	9.56	-0.1%	9.55	-0.2%
Expenditures (In Millions)	\$ 3,724.9	7.4%	\$ 4,024.8	16.0%	\$ 4,207.0	4.5%
Days	26,992,000	3.7%	28,292,137	8.7%	28,739,615	1.6%
Cost Per Arrival	n/a	-	\$ 5.06	-	n/a	-
Expenditure per Marketing \$	n/a	-	\$ 268.78	-	n/a	-

Assumptions:

- Growth in arrivals in 1Q2011.
- Increase in new service LAX and SFO to Hilo.
- Consumer spending is limited.
- Marketing blitzes drive interest and conversion.
- Mexico, Gulf and Caribbean will be aggressive in market.



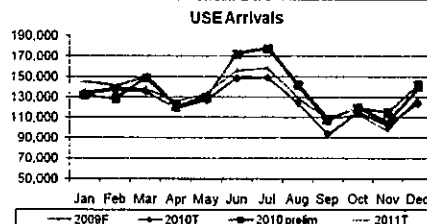
HAWAIIAN
ISLANDS

MARKET OUTLOOK: US EAST

	2010 Target		2010 Preliminary		2011 Target	
		% Change		% Change		% Change
Arrivals	1,505,000	-3.6%	1,630,857	4.4%	1,654,594	1.5%
PPPD\$	\$ 167.3	1.0%	\$ 172.4	4.1%	\$ 177.1	2.7%
Length of Stay	10.10	-2.8%	10.44	0.2%	10.44	0.0%
Expenditures (In Millions)	\$ 2,550.0	-5.4%	\$ 2,935.9	9.0%	\$ 3,059.0	4.2%
Days	15,245,650	-6.3%	17,029,420	4.7%	17,277,283	1.5%
Cost Per Arrival	n/a	-	\$ 5.98	-	n/a	-
Expenditure Per Marketing \$	n/a	-	\$ 300.91	-	n/a	-

Assumptions:

- US economy continues to stabilize - better in US East.
- Unemployment improves.
- Loss of some nonstop flights and decrease in frequency.
- Marketing blitz helps to stimulate market's pent up demand.
- Strong marketing by Caribbean.



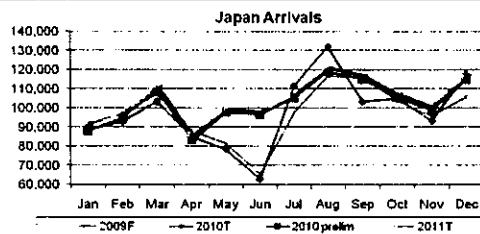
HAWAIIAN
ISLANDS

MARKET OUTLOOK: JAPAN

	2010 Target		2010 Preliminary		2011 Target	
		% Change		% Change		% Change
Arrivals	1,175,000	0.6%	1,229,762	5.3%	1,255,605	2.1%
PPPD\$	\$ 300.0	11.8%	\$ 267.8	-0.2%	\$ 274.5	2.5%
Length of Stay	6.00	2.9%	5.86	0.6%	5.85	-0.2%
Expenditures (In Millions)	\$ 2,115.0	15.8%	\$ 1,931.2	5.7%	\$ 2,017.1	4.4%
Days	7,050,000	3.6%	7,211,577	6.0%	7,348,400	1.9%
Cost Per Arrival	n/a	-	\$ 6.14	-	n/a	-
Expenditure Per Marketing \$	n/a	-	\$ 255.74	-	n/a	-

Assumptions:

- Yen remains strong.
 - Airlift will increase.
 - Consumer spending is limited.
 - Consumer confidence down from previous spending trend.
- (Conference Board December 7, 2010).



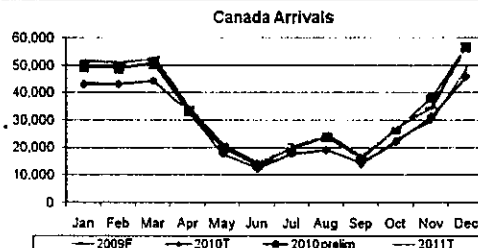
HAWAIIAN ISLANDS

MARKET OUTLOOK: CANADA

	2010 Target		2010 Preliminary		2011 Target	
		% Change		% Change		% Change
Arrivals	343,000	-1.0%	396,902	14.5%	406,029	2.3%
PPPD\$	\$ 136.0	-4.9%	\$ 146.8	2.7%	\$ 148.3	1.0%
Length of Stay	12.70	-0.2%	12.69	0.0%	12.67	-0.1%
Expenditures (In Millions)	\$ 590.6	-6.1%	\$ 739.5	17.6%	\$ 762.9	3.2%
Days	4,342,380	-1.2%	5,036,445	14.6%	5,144,542	2.1%
Cost Per Arrival	n/a	-	\$ 2.43	-	n/a	-
Expenditure Per Marketing \$	n/a	-	\$ 765.81	-	n/a	-

Assumptions:

- Economy remains stable.
- Western Canada's housing market strong.
- Unemployment is improving.
- Currency exchange rate favorable.
- Expansion of season flights from Calgary and Edmonton in Q2.
- New service from Bellingham, Washington.



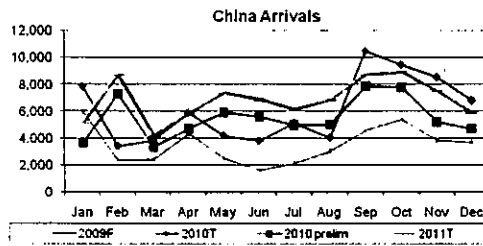
HAWAIIAN ISLANDS

MARKET OUTLOOK: CHINA

	2010 Target		2010 Preliminary		2011 Target	
		% Change		% Change		% Change
Arrivals	73,404	75.1%	66,047	57.5%	82,146	24.4%
PPPD\$	\$ 441.0	41.3%	\$ 357.0	25.0%	\$ 367.7	3.0%
Length of Stay	5.00	-23.2%	6.10	-12.9%	6.04	-1.0%
Expenditures (In Millions)	\$ 161.9	76.7%	\$ 143.8	71.5%	\$ 182.4	26.8%
Days	367,020	25.0%	402,885	37.3%	496,080	23.1%
Cost Per Arrival	n/a	-	\$ 15.31		n/a	-
Expenditure Per Marketing \$	n/a	-	\$ 142.20		n/a	-

Assumptions:

- Economy continues to flourish.
- Additional air service from Korea and Japan.
- Hawai'i-only packages are becoming the norm.
- U.S. Visa policies hampers Chinese visitors.
- PPPD\$ continues to grow but at a slower rate with change of type of visitor.

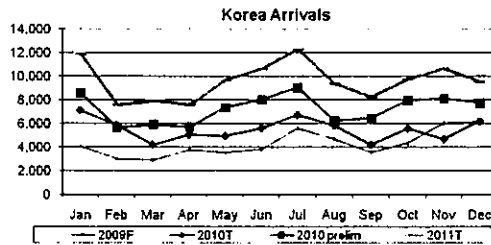


MARKET OUTLOOK: KOREA

	2010 Target		2010 Preliminary		2011 Target	
		% Change		% Change		% Change
Arrivals	66,000	28.5%	86,860	69.1%	115,225	32.7%
PPPD\$	\$ 303.0	57.0%	\$ 225.0	16.0%	\$ 247.5	10.0%
Length of Stay	5.00	-36.7%	8.01	1.4%	8.01	0.0%
Expenditures (In Millions)	\$ 100.0	27.7%	\$ 156.5	98.9%	\$ 228.4	45.9%
Days	330,000	-18.7%	695,753	71.5%	922,952	32.7%
Cost Per Arrival	n/a	-	\$ 7.72		n/a	-
Expenditure Per Marketing \$	n/a	-	\$ 233.54		n/a	-

Assumptions:

- Economy remains stable.
- Won remains favorable.
- Additional air capacity.
- FIT & Family visitors on the rise.
- Expect 50% growth in MICE visitors.

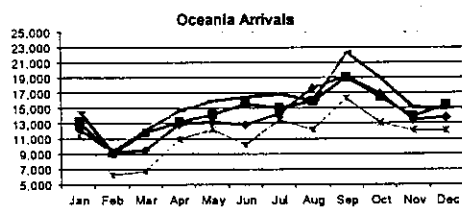


MARKET OUTLOOK: OCEANIA

	2010 Target		2010 Preliminary		2011 Target	
		% Change		% Change		% Change
Arrivals	165,215	20.8%	172,962	26.5%	188,000	8.7%
PPPD\$	\$ 235.0	15.8%	\$ 204.0	0.5%	\$ 206.0	1.0%
Length of Stay	8.80	-4.8%	9.93	7.5%	9.93	0.0%
Expenditures (In Millions)	\$ 341.7	33.4%	\$ 350.3	36.7%	\$ 384.6	9.8%
Days	1,453,892	15.2%	1,717,119	36.0%	1,866,414	8.7%
Cost Per Arrival	n/a	-	\$ 6.21	-	n/a	-
Expenditure Per Marketing \$	n/a	-	\$ 326.25	-	n/a	-

Assumptions:

- Economy remains stable.
- Strength of Australian dollar fosters growth in overseas vacation.
- Low unemployment rate and resurgence in commodity exports.
- Increase seats in market from Hawaiian Airlines and Air New Zealand.



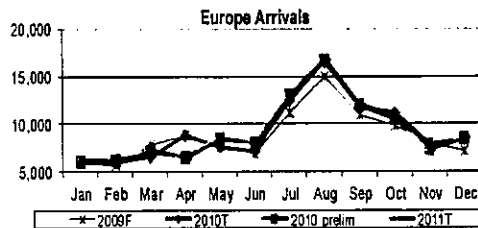
HAWAIIAN ISLANDS

MARKET OUTLOOK: EUROPE

	2010 Target		2010 Preliminary		2011 Target	
		% Change		% Change		% Change
Arrivals	110,000	5.4%	109,245	-4.6%	110,802	1.4%
PPPD\$	\$ 180.0	24.7%	\$ 176.0	22.0%	\$ 177.8	1.0%
Length of Stay	12.00	-8.3%	13.09	0.0%	13.16	0.5%
Expenditures (In Millions)	\$ 237.6	20.5%	\$ 251.7	27.6%	\$ 259.1	3.0%
Days	1,320,000	-3.4%	1,430,058	4.6%	1,457,690	2.0%
Cost Per Arrival	n/a	-	\$ 3.01	-	n/a	-
Expenditure Per Marketing \$	n/a	-	\$ 764.77	-	n/a	-

Assumptions:

- European economy uncertain; however, UK and Germany are fairing better than the others.
- Euro exchange rate forecasted to be slightly weaker, while pound remains stable.
- Traveling closer to home.
- Strong marketing by Caribbean.



HAWAIIAN ISLANDS

AIRLIFT OVERVIEW

• Seat Inventory Overview

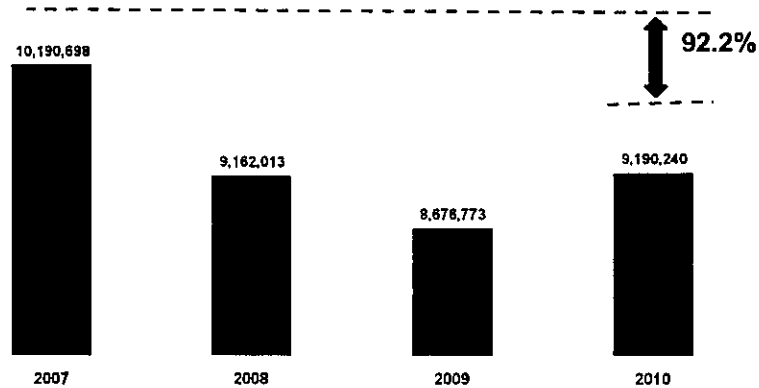
Scheduled Air Seats									
2002 - 2010									
	2002	2003	2004	2005	2006	2007	2008	2009	2010
TOTAL	8,252,306	8,557,770	9,317,245	10,023,606	10,360,886	10,190,698	9,162,013	8,676,773	9,190,240
US West	4,640,094	4,987,951	5,295,351	5,756,866	6,323,008	6,301,206	5,622,071	5,346,752	5,745,356
US East	821,464	963,693	1,281,642	1,415,379	1,243,016	1,098,866	1,048,333	894,638	923,036
Japan	1,961,733	1,785,277	1,857,465	1,970,365	1,816,797	1,851,850	1,605,128	1,597,326	1,627,513
Canada	313,773	299,419	290,725	300,182	369,886	304,393	280,375	228,838	286,492
Other Asia	78,176	94,407	103,809	126,751	130,320	140,551	137,038	164,965	154,089
Oceania	211,129	189,564	228,608	227,268	244,173	259,968	193,287	168,524	172,496
Other	225,937	237,459	259,645	226,795	233,686	233,864	275,781	275,730	281,258

Source: HTA Scheduled Airseats
2010 - as of December 2010 OAG



AIR SERVICE TO HAWAI'I

Total Scheduled Nonstop Air Seats



Source: OAG database. Estimate based on flights on 2010 airline schedules as of December 2010.





AIR SERVICE MARKET SITUATION



- Passenger demand returns in higher yielding segments



- International Travel



- Business Travel



- Hawai'i competes with other long-haul markets for aircraft time



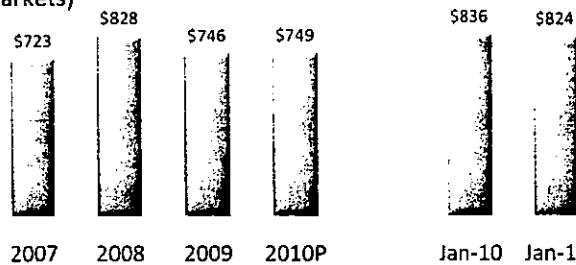
- "Hassle factor" (TSA, ancillary fees, crowded planes)



OIL PRICES, AIRFARES ON THE RISE



Average Roundtrip Base Airfare* to Hawai'i (All Markets)



Domestic	\$603	\$687	\$640	\$617	\$720	\$631
Int'l	\$1,032	\$1,052	\$963	\$1,074	\$1,107	\$1,196



*Note: Base airfares exclude taxes, fees, fuel surcharges, ancillary charges.
Source: Sabre ADI, 2010 and 2011 data are preliminary





PRELIMINARY 2011 FORECAST



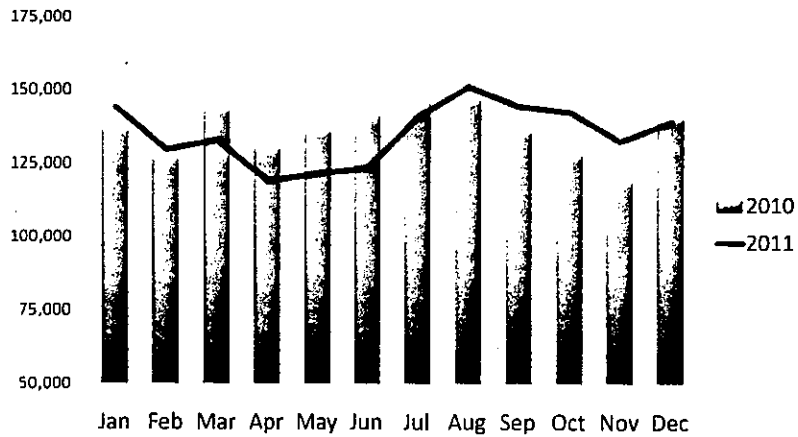
	2010	2011	% Change
US West	5,974,212	5,745,356	+4.0%
US East	768,560	923,036	-16.7%
Canada	307,811	286,492	+7.4%
Japan	1,619,204	1,627,513	-0.5%
Other Asia	263,813	154,089	+71.2%
Oceania	203,555	172,496	+18.0%
Other	275,096	281,258	-2.2%
Total	9,412,251	9,190,240	+2.4%

Source: HTA forecast based on OAG and Sabre
airline schedules as of February 2011



SCHEDULED NONSTOP SEATS FROM JAPAN

2011 vs. 2010



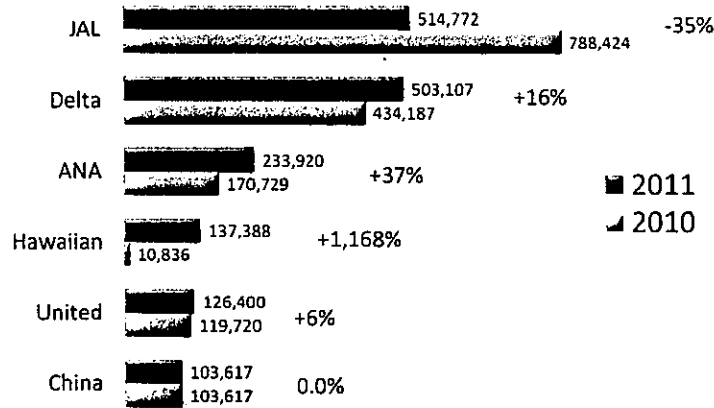
Note: Forecast includes announced Hawaiian Osaka flights as of July 2011, but does not include 8,460 additional charter seats expected in 2011.
Source: HTA forecast based on OAG schedules





SCHEDULE NONSTOP SEATS FROM JAPAN

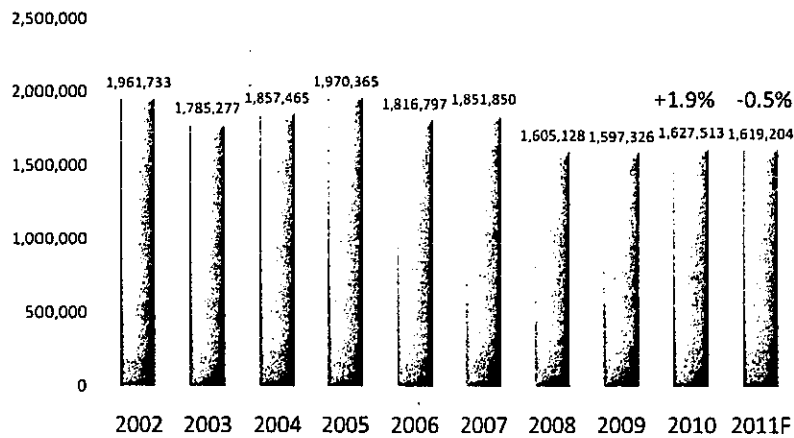
2010 vs. 2011 (Forecast) BY CARRIER



Note: Forecast includes announced Hawaiian Osaka flights as of July 2011, but does not include 8,460 additional charter seats expected in 2011.
Source: HTA forecast based on OAG schedules



SCHEDULED SEATS FROM JAPAN 2002 THRU 2011 (Forecast)



Note: Forecast includes announced Hawaiian Osaka flights as of July 2011, but does not include 8,460 additional charter seats expected in 2011.
Source: HTA forecast based on OAG schedules

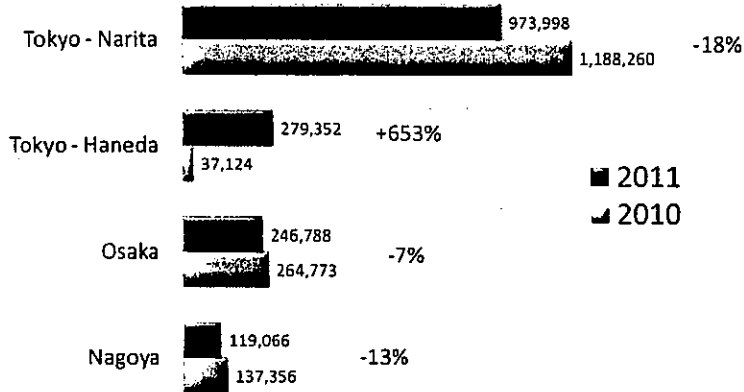




SCHEDULED NONSTOP SEATS FROM JAPAN



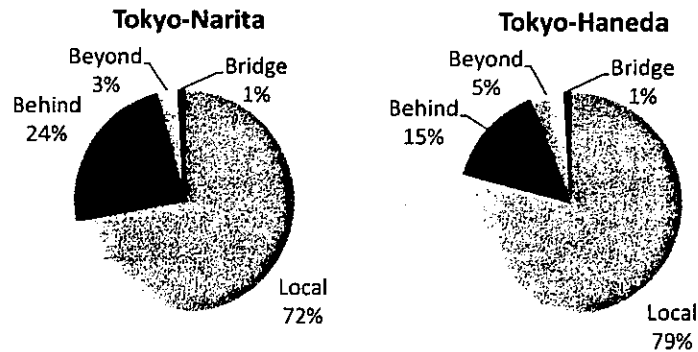
2010 vs. 2011 (Forecast) BY GATEWAY



Note: Forecast includes announced Hawaiian Osaka flights as of July 2011, but does not include 8,460 additional charter seats expected in 2011.
Source: HTA forecast based on OAG schedules



TOKYO-HONOLULU PASSENGER FLOWS LOCAL vs. CONNECTING TRAFFIC



Source: Sabre ADI, November 2010 through January 2011 data.





TOP CONNECTING MARKETS VIA TOKYO - NARITA & TOKYO-HANEDA



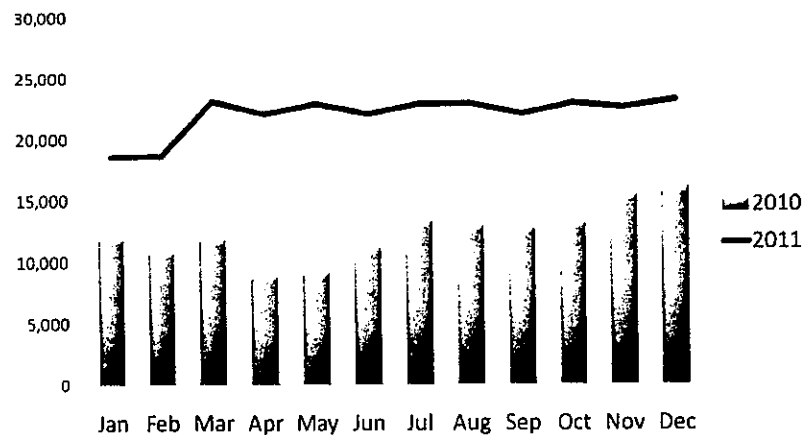
	Origin	% of Total	Origin	% of Total
1	Taipei (TPE)	19%	Fukuoka	16%
2	Seoul (ICN)	15%	Osaka (ITM)	10%
3	Beijing	7%	Hiroshima	6%
4	Hong Kong	6%	Seoul (GMP)	5%
5	Shanghai	6%	Sapporo	5%
6	Okinawa	5%	Matsuyama	4%
7	Bangkok	5%	Toyama	3%
8	Sapporo	4%	Kumamoto	3%
9	Fukuoka	4%	Akita	3%
10	Nagoya	4%	Taipei (TSA)	3%



Source: Sabre ADI passenger data, November 2010 thru January 2011



SCHEDULED SEATS FROM SOUTH KOREA 2011 Vs. 2010



Source: HTA forecast based on OAG schedules

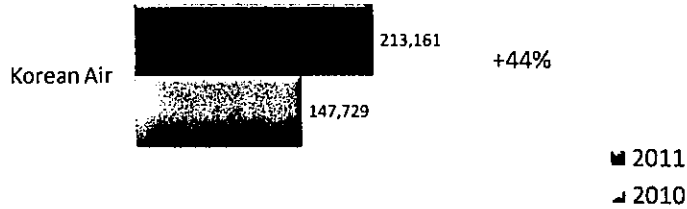




SCHEDULED SEATS FROM SOUTH KOREA



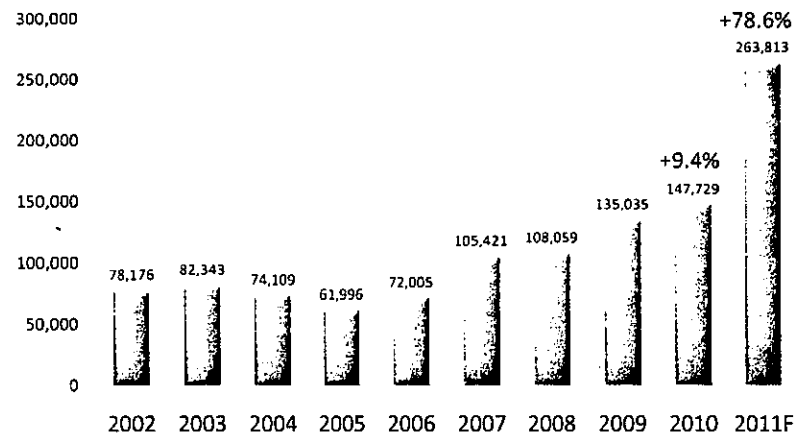
2010 vs. 2011 (Forecast) BY CARRIER



Source: HTA forecast based on OAG schedules



SCHEDULED SEATS FROM SOUTH KOREA 2002 THRU 2011 (Forecast)

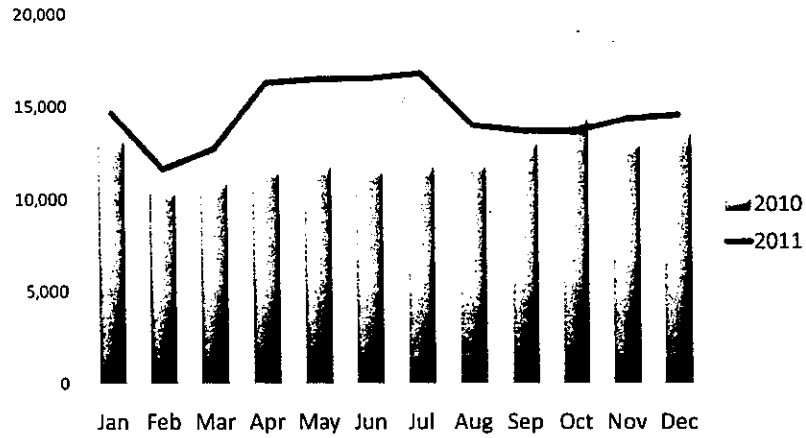


Source: HTA forecast based on OAG schedules





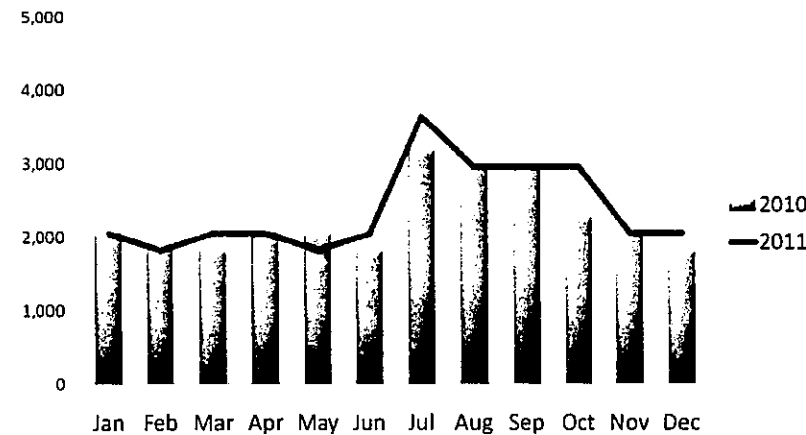
SCHEDULED SEATS FROM AUSTRALIA 2011 (Forecast) vs. 2010



Source: HTA forecast based on OAG schedules



SCHEDULED SEATS FROM NEW ZEALAND 2011 (Forecast) vs. 2010

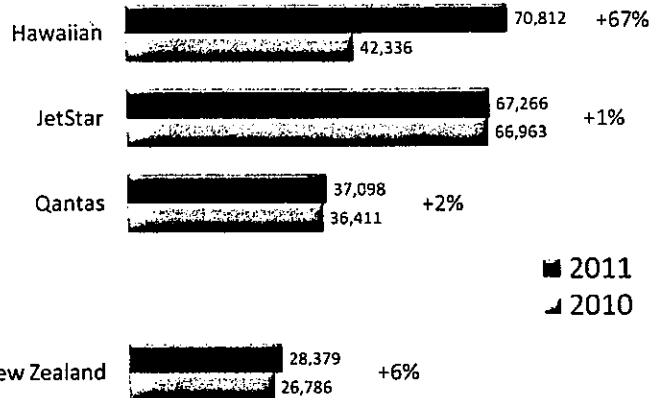


Source: HTA forecast based on OAG schedules





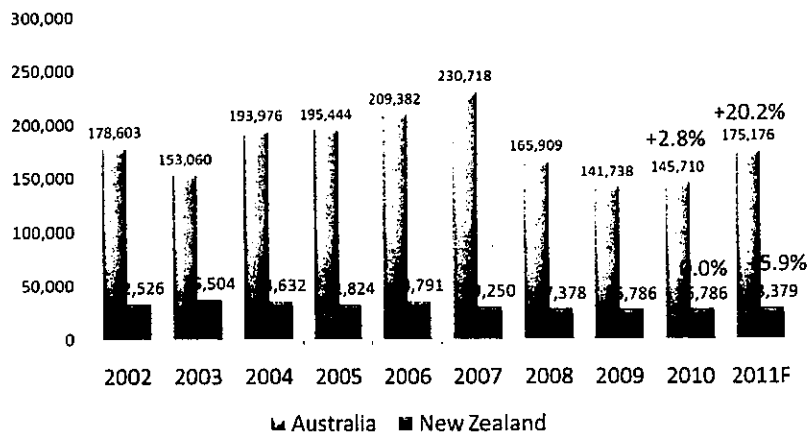
SCHEDULED SEATS FROM OCEANIA 2010 vs. 2011 (Forecast) BY CARRIER



Source: HTA forecast based on OAG schedules



SCHEDULED SEATS FROM OCEANIA 2002 THRU 2011 (Forecast)



Note: Australia service included nonstop Melbourne flights in 2002 and 2007.
Source: HTA forecast based on OAG schedules



CONVENTION CENTER BACKLOG

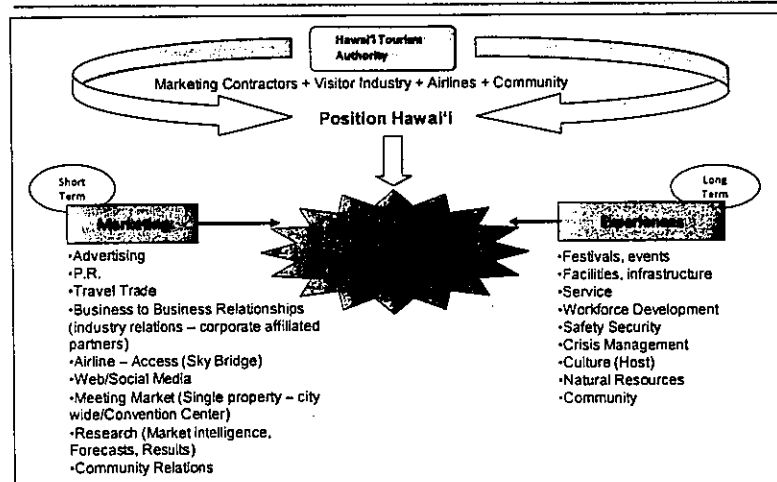


Year	Events	Delegates	Room Nights
2002	28	69,200	438,280
2003	40	112,198	654,683
2004	39	152,015	579,731
2005	46	176,130	706,489
2006	37	97,170	568,433
2007	39	91,765	545,208
2008	40	77,968	428,753
2009	31	94,800	628,020
2010	27	84,450	517,917
2011	20	77,278	514,598
2012	10	47,100	314,804
2013	9	47,831	323,721
2014	14	63,253	442,848
2015	6	44,000	354,920
2016	2	9,200	73,968
2017	5	30,860	248,114
2018	1	3,000	24,120
2019	3	23,860	181,338
2020	2	18,500	148,740
2021	2	9,200	73,968
2022	1	6,500	52,260
TOTAL 2011-2022	75	380,382	2,753,397

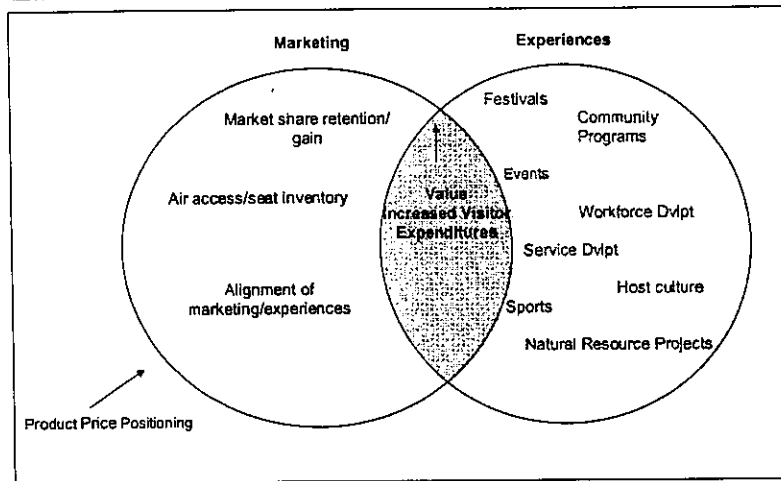
As of February 21, 2011



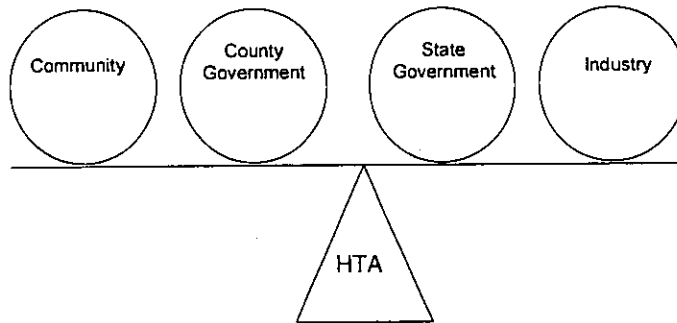
RENAISSANCE OF ALOHA INITIATIVE



RENAISSANCE OF ALOHA INITIATIVE



RENAISSANCE OF ALOHA INITIATIVE



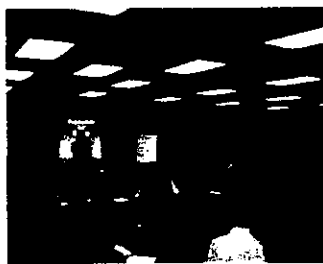
COMMUNICATIONS



- Campaign strategy in communicating the good of the industry to the community
- Multiple vehicles and channels to deliver the message
- Must elevate the appreciation and respect for the industry's values and contributions

The
HAWAIIAN
ISLANDS

WORKFORCE DEVELOPMENT



- Elevate the industry's culture and service with programs to recognize attentiveness and devotion to culture and service awareness.
- Develop curriculum that has continuity between the AOHT high school programs, community colleges, and the University of Hawai'i TIM School.
- Cultivate the stewards/caretakers of the culture and the industry.

The
HAWAIIAN
ISLANDS

ARRIVAL AND DEPARTURE EXPERIENCE



- Hawai'i's airports are not just an integral transportation system, but part of the hospitality industry.



- Majority of our visitor's first and last experiences in Hawai'i happen at the airport.



- Small changes can have a significant impact

- PA announcements at Hawai'i's airports
- New arrival and departure announcements
- Currently played two times every hour



- Our commitment to the host culture is not rhetoric!



HAWAIIAN
ISLANDS

SPORTS



- Further diversification of sporting events needed
- Participation (spectator or participatory) needs to be pursued on all islands
- Year-round optimum climate
- Central location for international competition
- Multiple facilities on all islands

HAWAIIAN
ISLANDS

CPEP – COUNTRY PRODUCT ENRICHMENT PROGRAMS



- Positioning of events during the shoulder periods
- Alignment and integration with the industry partners
- Umbrella marketing strategy; grouping, positioning of events; and, shared resources.
- Support in funding to lead to sustainability in the future

HAWAIIAN
ISLANDS

CULTURE & ARTS



- Language – Music – Hula – Surfing – Cuisine
- Complements the Brand Experience
- Expand the experiences that visitors and residents engage in
- Connection to the community



HAWAIIAN
ISLANDS

NATURAL RESOURCES



- Authentic experiences broadening the use of our Natural Resources
- Engage and educate both the residents and industry on the proper use and care of the natural resources.
- Improved coordination and collaboration needed to leverage resources.
- "Greening of the Industry"



The
HAWAIIAN
ISLANDS

HAWAIIAN CULTURE



- The variable that differentiates Hawai'i from the rest of the world.
- Must be integrated throughout the *Brand Experience*.
- Expansion of cultural festivals that pay tribute to the host culture.
- Connect these experiences to the visitor industry and communities

The
HAWAIIAN
ISLANDS

BUILDING VALUE, EXPERIENTIAL VALUE



- Community connectivity with the travel industry



- Growing our experiences for communities and visitors



- New programs



- Current programs that need to be cultivated further



IN A CONCH SHELL.....



- Continue to cultivate and grow air access
- Being sensitive to the airline's business models as well as your own



- Grow ADR, RevPar, airfares and ancillary spending while building experiential value



- Convention, meetings, and incentive business remains a concern and focus



- Build the sustainability of our community with the support of our tourism industry



- Cultivate home grown youth to find their way into our industry

- Continuing to elevate service deliveries while remaining mindful of the representation of our host culture



HAWAIIAN
ISLANDS



MAHALO !!!!

COMPETITION EDGE AGAINST OTHER DESTINATIONS

Visitor Research
Spring Marketing Update
March 2, 2011
Daniel Nahoopii



WHERE DID OUR SOURCE MARKETS GO?

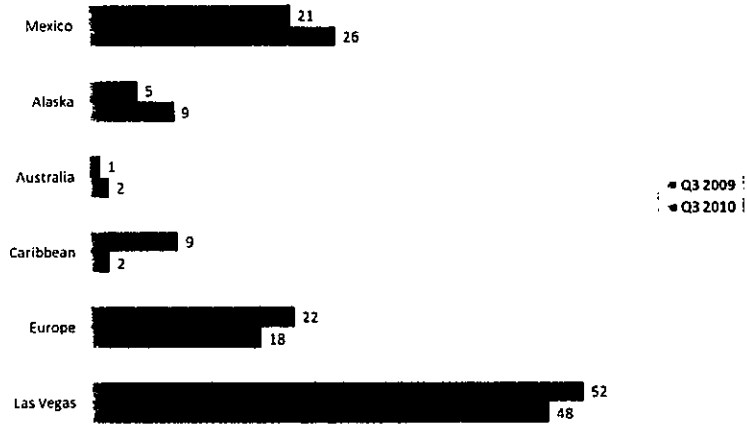




U.S. West: Las Vegas Steady Growth in Mexico and Alaska



Q: Please indicate whether you have visited each of the following leisure destinations in the past 12 months.



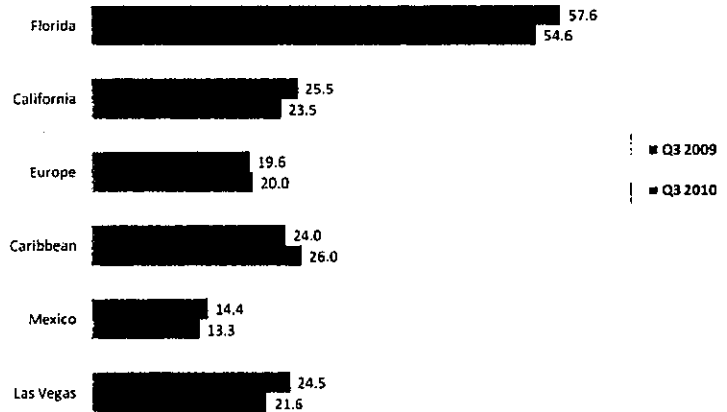
HTA 3rd Qtr 2010 Marketing Effectiveness Study



U.S. East: Still Heavily Florida Increase in Caribbean



Q: Please indicate whether you have visited each of the following leisure destinations in the past 12 months.

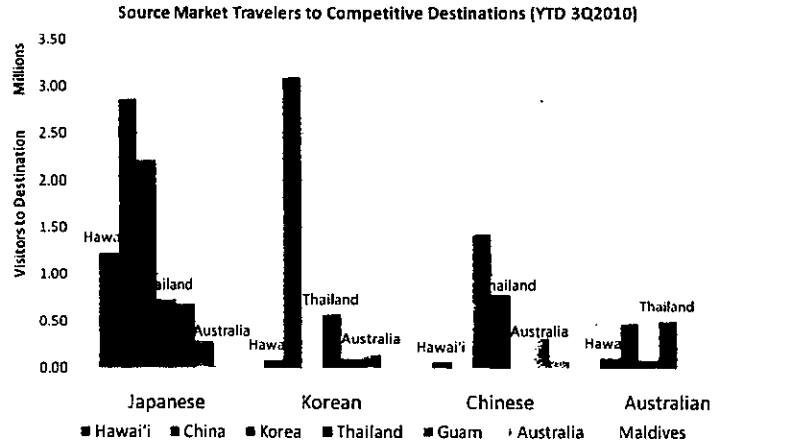


HTA 3rd Qtr 2010 Marketing Effectiveness Study





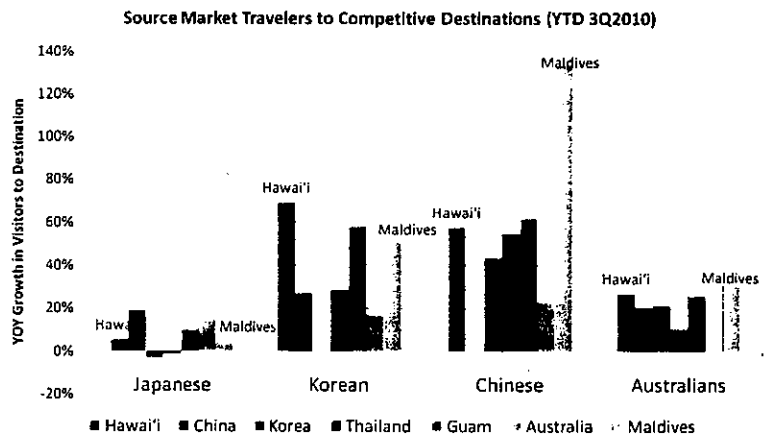
Competition includes China, Korea, Also Thailand and Australia



PATA 3rd Qtr 2010



Hawai'i Maintaining Its Share of Visitors From All Markets



PATA 3rd Qtr 2010





Plan to Visit in Next Two Years (for US & Japan only)



- U.S. West Increased Interest in Hawai'i, Vegas



Waning Interest for Europe



- U.S. East: Increased interest in Caribbean



- Japan: Interest in visiting Hawai'i is strong

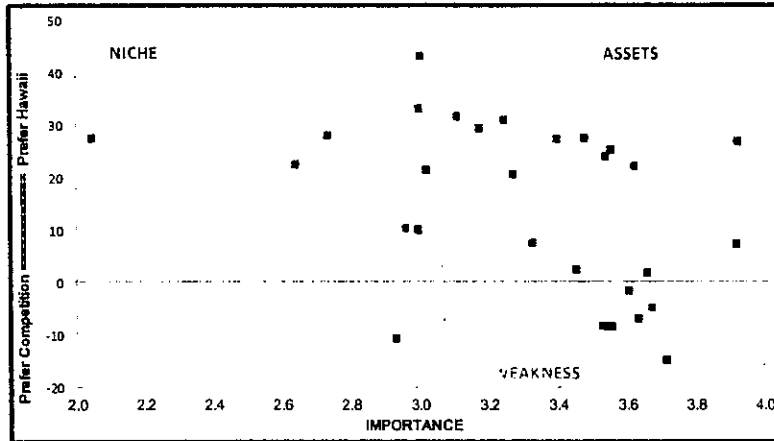


DRIVING DEMAND

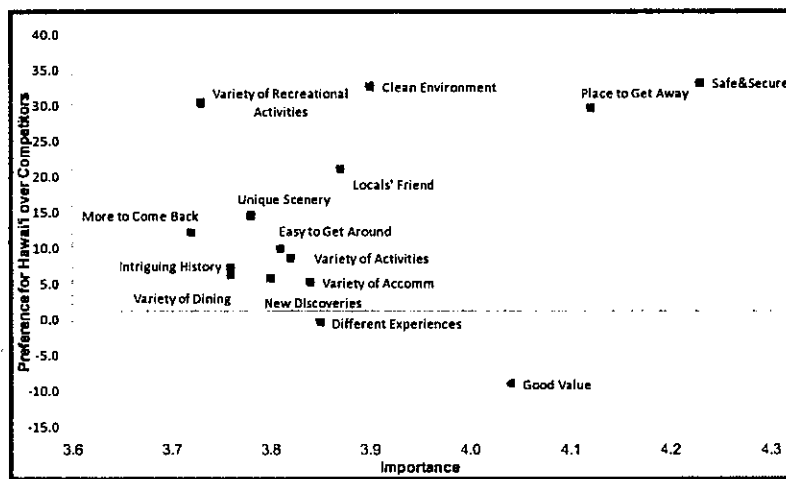




Hawai'i has Strong Assets but also Less Competitive Attributes



US West Assets and Weaknesses

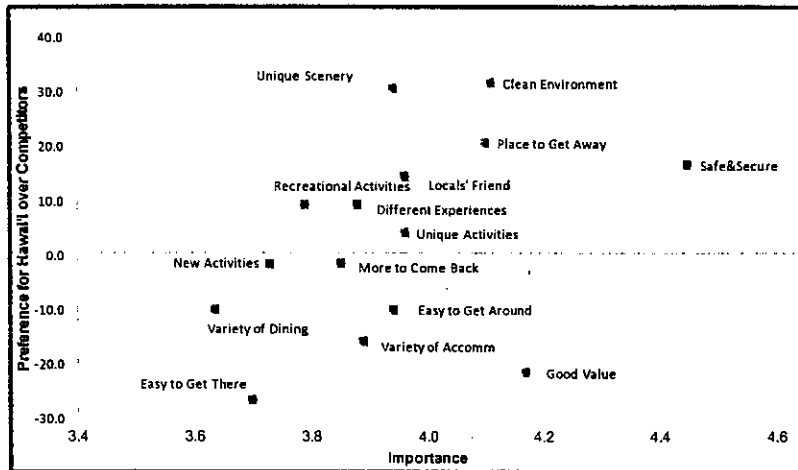


HTA 3rd Qtr 2010 Marketing Effectiveness Study





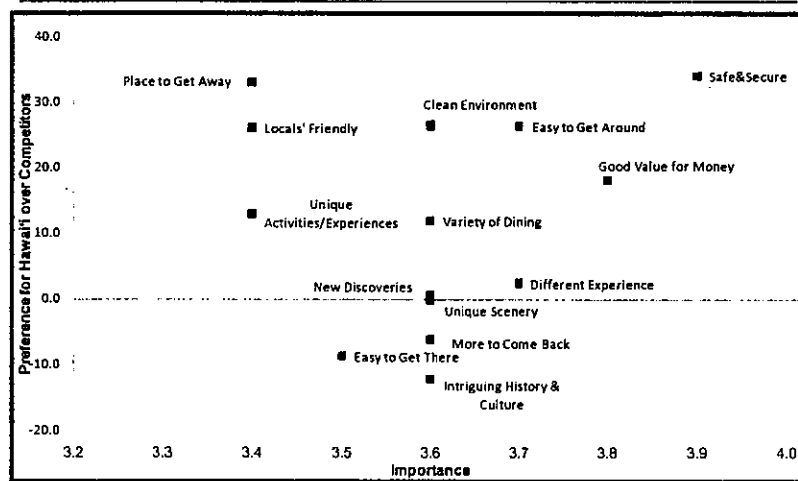
US East Assets & Weaknesses



HTA 3rd Qtr 2010 Marketing Effectiveness Study



Japan Assets & Weaknesses



HTA 3rd Qtr 2010 Marketing Effectiveness Study





Next Steps



- Promote assets – competitive advantage



- Increase awareness of lesser known attributes



- Develop products/programs to address weaker attributes



- Niche markets

- hawaiiitourismauthority.org/research

