



HAWAII TOURISM
AUTHORITY

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David Y. Ige
Governor

George D. Szigeti
President and Chief Executive Officer

December 29, 2016

DEPT. COMM. NO. 202

Aloha!

On behalf of the Hawai'i Tourism Authority's board of directors and staff, please find enclosed for your review our 2016 Annual Report.

We deeply appreciate the legislature's collaborative support of our marketing efforts to benefit the businesses and residents statewide who rely on a thriving tourism industry. Hawai'i will set new annual records for visitor arrivals, visitor spending and generated state tax revenue in 2016, and we are confident this positive momentum can be maintained going into 2017.

As we celebrate the holidays, mahalo for the aloha and support you have extended to Hawai'i's tourism industry and HTA. Our best wishes go to you and your family for a healthy and happy 2017.

Warmest Aloha,

George D. Szigeti
President & CEO



2016
ANNUAL REPORT
TO THE
HAWAII STATE
LEGISLATURE

HAWAII TOURISM
AUTHORITY

E kaupē aku nō i ka hoe a kō mai.
Put forward the paddle and draw it back.

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Aloha kākou,

When we accepted our respective positions as President/CEO and Board Chair of the Hawai'i Tourism Authority in mid-2015, we were advised Hawai'i tourism could be facing a downturn in 2016.

This outlook was especially sobering considering the record run of success that Hawai'i's tourism industry had enjoyed since 2012.

Thankfully, Hawai'i tourism has continued to thrive. In fact, 2016 is on pace to become the State of Hawai'i's best year ever for visitor arrivals, visitor spending and tourism-generated state tax revenue.

This is an achievement all of Hawai'i shares in, as the cumulative impact of tourism's success is realized in some form of daily life by every resident, business, charitable organization and community throughout the state.

As 2016 began, HTA had established a solid foundation to advance Hawai'i's marketing of tourism. HTA's new leadership streamlined its operations, created a precise budget, improved its measures of accountability for marketing contractors, and finalized a strategic plan to guide HTA's direction for the next five years.

Throughout 2016, HTA implemented a vision to expand Hawai'i's reach to a broader base of global travelers, both to maintain the momentum of tourism's success and to more effectively engage the younger generation of travelers known as millennials, the nation's largest population segment.

Greater usage of technology to market Hawai'i tourism is essential to the industry's success. HTA introduced key initiatives utilizing cutting-edge technology to increase awareness of Hawai'i's brand appeal, notably:

- GoHawai'i mobile app, the State of Hawai'i's first travel destination app.
- Hawai'i VR, the State of Hawai'i's first virtual reality program showcasing the Hawaiian Islands.
- Discover Your Aloha, a groundbreaking facial recognition software program marketing Hawai'i travel in partnership with Expedia.

In addition, development was initiated on a new, more interactive GoHawai'i website that will debut in 2017.

A special accomplishment of 2016 was the Hawai'i Convention Center recording an annual profit for the first time since opening in 1998. We appreciate the strategies and diligence that AEG Facilities has employed to turn around Hawai'i's premier meeting facility.

Competition to entice travelers from well-funded destinations worldwide is constant and intense. HTA needs to always push forward with innovative strategies to promote Hawai'i's unmatched allure and authenticity.

HTA will continue to balance its marketing of tourism with support of events, programs and initiatives to help perpetuate the Hawaiian culture and preserve Hawai'i's natural resources. These two qualities, more than any other, elevate Hawai'i as a destination to treasure and remember.

In closing, 2016 was a superb year for Hawai'i tourism and the support of our government leaders, industry stakeholders and marketing partners was instrumental to the economic benefits enjoyed by residents and businesses statewide. We look forward to a continued collaboration on their behalf in 2017.

Mahalo nui,



George D. Szigeti, HTA President & CEO
and L. Richard Fried, Jr., HTA Board Chair

George D. Szigeti
HTA President & CEO

L. Richard Fried, Jr.
HTA Board Chair

HAWAI'I TOURISM AUTHORITY BOARD OF DIRECTORS

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Hyatt Regency Waikiki Beach Resort and Spa
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President & CEO, Denise Hayashi Consulting LLC
At-Large

2016: A YEAR OF STRENGTHENING TOURISM'S FUTURE

The following are noteworthy events and news from 2016 that convey the commitment of the Hawai'i Tourism Authority to strengthen the future of Hawai'i tourism — the state's leading industry for jobs and economic growth — while supporting the preservation of our Islands' culture, natural resources and community spirit.



5 HTA appoints Leslie Dance as vice president of marketing and product development, Charlene Chan as director of communications, and Chris Sadayasu as tourism brand manager.

27 HTA awards \$3.3 million to support 162 nonprofit groups perpetuating Hawaiian culture, the environment and community events.

28 HTA releases Hawai'i visitor statistics for 2015, revealing new records in annual visitor arrivals (8.7 million), visitor spending (\$15.1 billion), and state tax revenue (\$1.6 billion).

4 HTA introduces the Tourism is a Family Business online campaign to emphasize the impact of tourism's success on families statewide.

23 HTA supports the restoration of Mālolo, the revered koa wood canoe built in the 1920s. The Miloli'i Canoe Club will use Mālolo during the 2017 racing season.

2 HTA provides \$200,000 to fund the 2016 Junior Lifeguard Program, offered to youths ages 12-17 on O'ahu, Maui, Kaua'i and the island of Hawai'i.

6 HTA appoints Kalani Ka'anā'anā as director of Hawaiian cultural affairs.

4 HTA retains Ascendent Sports Group of New York to provide sports marketing services benefiting the State of Hawai'i.

8 HTA launches the GoHawai'i mobile app, the first travel app produced by the State of Hawai'i. More than 20,000 people in 16 countries download the app in its first month.

10 HTA provides \$150,000 to support the Hawai'i Surfing Association and the 25 community surf competitions it holds statewide.

26 HTA announces the Fed Cup will return to Maui on Feb. 11-12, 2017, for a match between the U.S. and Germany. Hawai'i is the first state to host the Fed Cup in consecutive years.

27 HTA is informed by AEG Facilities, its contractor for the Hawai'i Convention Center, that the center will earn an annual profit for the first time since opening in 1998.

1-11 The 75th Pearl Harbor Commemoration hosts a series of special events generating worldwide attention. HTA provided initial financial support toward marketing of the commemoration.

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

6-7 The U.S. plays Poland in a Fed Cup tennis match in Kailua-Kona, an event supported by HTA. The Fed Cup is the world's foremost international women's team tennis competition.

12 HTA supports a multimonth public outreach campaign to help educate tourism stakeholders on preventing the spread of mosquito-borne diseases.

29 Ku'uipo Kumukahi is confirmed by the Hawai'i State Senate to serve on HTA's board of directors.



16 HTA receives its first-ever President's "E" Award from the U.S. Department of Commerce recognizing its excellence at exporting tourism.

24 HTA expands its reach to Asia travel consumers with marketing representation in Hong Kong.



1-10 Hawai'i hosts the IUCN World Conservation Congress, marking the first time the U.S. has hosted the international convention. HTA provides major financial support.

26-30 HTA expands the Hawai'i Tourism Conference to a week and welcomes a record 2,100 participants from 18 countries.

27 HTA debuts Hawai'i VR, a cutting-edge virtual reality tour experience promoting travel to the Hawaiian Islands, downloadable by users worldwide.

28 HTA and Expedia launch facial recognition software to market the Hawaiian Islands. The groundbreaking technology is a first for promoting travel.

11 HTA partners with ESPN on the State Farm Armed Forces Classic in Honolulu, tipping off the college basketball season with a doubleheader featuring Michigan State vs. Arizona, and Kansas vs. Indiana.

20-27 HTA is presenting sponsor of the Hawai'i Open, the first-ever Women's Tennis Association tournament in Hawai'i. It features 32 world-ranked tennis players competing at the Patsy T. Mink Central O'ahu Regional Park.



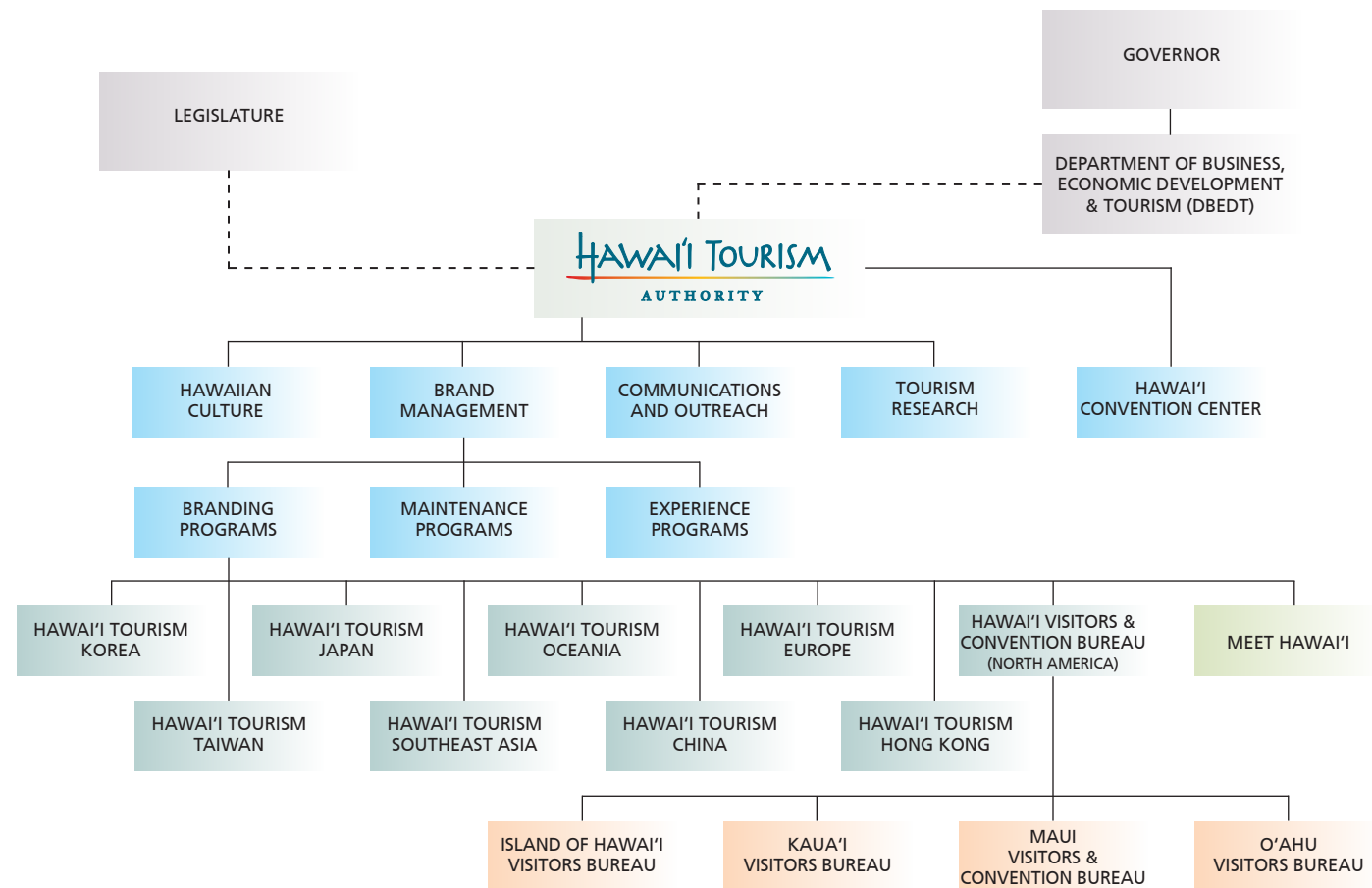
OVERVIEW OF THE HAWAI'I TOURISM AUTHORITY

The Hawai'i Tourism Authority was established in 1998 through a legislative act as the lead state agency for Hawai'i's tourism industry. This same act also established the Tourism Special Fund – a set percentage of the Transient Accommodations Tax (TAT) collections that is assessed on hotels, vacation rentals and other accommodations to be used by HTA to market, develop and support Hawai'i's tourism economy. Among its responsibilities, HTA is charged with:

- Setting tourism policy and direction from a statewide perspective.
- Developing and implementing the state's tourism marketing plan and efforts.
- Supporting programs and initiatives perpetuating the Hawaiian culture, Hawai'i's natural resources, and community festivals and events statewide.
- Sustaining the goals in the HTA Five-Year Strategic Plan: 2016.
- Managing programs and activities to sustain a healthy tourism industry for the state.
- Coordinating tourism-related research, planning, promotional and outreach activities with the public and private sectors.
- Encouraging distribution of visitors across all of the Hawaiian Islands to balance capacity.
- Fostering greater collaboration with other state agencies.

OPERATIONS

HTA is administratively attached to the Hawai'i State Department of Business, Economic Development and Tourism (DBEDT). HTA's president and chief executive officer reports directly to the HTA board of directors and is responsible for assisting the board in its responsibility to execute the mandates of Chapter 201B of the Hawai'i Revised Statutes.



As 2015 came to a close, the Hawai'i Tourism Authority completed a Five-Year Strategic Plan to guide the vision, planning, work product, objectives and goals for its support of tourism on behalf of the Hawaiian Islands.

HTA established four goals in the Strategic Plan that it constantly strives to achieve in the fulfillment of its service for Hawai'i's tourism industry.

GOAL 1: Improve the Integrity of the Destination

GOAL 2: Ensure Stable Economic Benefits

GOAL 3: Elevate Hawai'i's Value Perception

GOAL 4: Strengthen HTA's Reputation

The contents of the 2016 Annual Report are presented for review under the same guidelines of the four goals.

MEASURES OF SUCCESS

The Hawai'i Tourism Authority Five-Year Strategic Plan serves as the road map for addressing short- and long-term goals to achieve measures of success based on research data, market intelligence, input from stakeholders, and collaboration with industry associations. Targets have been established as a means to measure the success of attaining the strategic plan goals.

GOAL	MEASURE OF SUCCESS	RECENT VALUE(S)	PROPOSED 1-YEAR TARGET (2016)	PROPOSED 3-YEAR TARGET (2018)	PROPOSED 5-YEAR TARGET (2020)
Improve the Integrity of the Destination	Percentage of residents who agree that tourism has brought more benefits than problems <i>Source:</i> <i>HTA Resident Sentiment Survey</i>	2002: 77% 2005: 71% 2006: 74% 2007: 71% 2009: 78% 2010: 80% 2012: 67% 2014: 64% 2015: 66%	64%	75% <i>(average of 2002-2010 results)</i>	80%
Ensure Stable Economic Benefits	Real (inflation-adjusted) Gross Domestic Product generated by visitor-related expenditures <i>Source:</i> <i>DBEDT/READ (2009 = 100)</i>	2005: \$11,823 mil. 2006: \$12,133 2007: \$11,895 2008: \$10,857 2009: \$8,898 2010: \$9,567 2011: \$10,236 2012: \$11,860 2013: \$11,855 2014: \$11,941 2015: \$11,796 <i>2012-2015 revised from previous data book</i>	\$12,170 mil.	\$12,750 mil.	\$13,280 mil.
Elevate Hawai'i's Value Perception	Percentage of potential visitors considering a trip to Hawai'i <i>Source:</i> <i>HTA Marketing Effectiveness Study</i>	LATE 2015 U.S. West: 50% U.S. East: 19% Canada: 45% Japan: 47% EARLY 2016 U.S. West: 46% U.S. East: 32% Canada: 46% Japan: 41%	U.S. West: 45% U.S. East: 21% Canada: 36% Japan: 31%	U.S. West: 50% U.S. East: 24% Canada: 38% Japan: 34%	U.S. West: 52% U.S. East: 26% Canada: 40% Japan: 34%
Strengthen HTA's Reputation	Percentage of organizations in the tourism industry that recognize HTA as a leader <i>Source:</i> <i>Survey under development</i>	Measure does not exist yet	Baseline: Identify core question or index	Baseline + 10% of difference between baseline and 100% <i>(Example: If baseline is 50%, target is 55%)</i>	Baseline + 25% of difference between baseline and 100% <i>(Example: If baseline is 50%, target is 62.5%)</i>

BRAND MANAGEMENT PLAN

The Hawai'i Tourism Authority Brand Management Plan describes the objectives, strategies, actions and evaluation approach that HTA will undertake to achieve the goals within the HTA Five-Year Strategic Plan. Initially, Hawai'i Revised Statutes Section HRS 201B-6 required HTA to prepare a tourism marketing plan as a single comprehensive document, to include its brand management efforts, targeted markets, performance goals and targets, and guidelines for programs implemented through contracts with destination marketing organizations. During the 2014 Legislative Session, amendments were made to the statute for clarity and organization of the chapter, calling for replacing "marketing and promotion" with "brand management" where appropriate. HTA therefore prepares a brand management plan rather than a marketing plan.

The plan includes detailed execution strategies for brand marketing – including the individual brand management plans by major market area – as well as execution plans for HTA's brand maintenance, brand experience, communications and research programs. It also presents an operational plan that organizes HTA for success. This document frames HTA's 2016 efforts to address the needs of Hawai'i's tourism industry and improve the continuity of business to maintain its standing as the foundational economic driver for the state. These plans will also guide HTA into the future, aligning its strategic vision through the next five years, bringing structure to its initiatives, and identifying and prioritizing the most pertinent issues.

HTA's programs in this plan are aligned under the areas outlined below:

- 1) Awareness, conviction and access
- 2) Unique and memorable experiences (competitive advantage and experience quality)
- 3) Knowledge and collaboration
- 4) Strategic oversight and governance

The purpose of this structure is to enhance the efficiencies in HTA management, create stronger emphasis on the core areas by grouping related programs, ensure that communications and tourism research are incorporated into all program areas, and integrate the Hawaiian culture into all HTA initiatives.



IMPROVE THE INTEGRITY OF THE DESTINATION

Hō'i hou i ka mole.
Return to the taproot.

Just as the taproot is the source of life for the healthy tree with strong branches that spread wide, so, too, is Hawaiian culture and the natural environment the source of life for Hawai'i's tourism future. They must always be nurtured to flourish.

MAINTAINING THE BRAND

This section illustrates programs that have been developed to sustain and enhance Hawai'i's brand promise. These programs address the long-term sustainability of the destination as it relates to the fundamental elements that define the Hawaiian Islands: people, place and culture.

PROGRAMS

Hawaiian Culture

Efforts to perpetuate Hawaiian culture and maintain Hawai'i's unique identity in an authentic and sustainable manner.

Natural Resources

Efforts to safeguard and preserve Hawai'i's environment to perpetuate its existence for generations to come.

Product Development

Efforts to create unique travel experiences for visitors by showcasing a variety of community festivals, events and programs.



HAWAIIAN CULTURE

The Hawai'i Tourism Authority supports a broad range of community programs and public information initiatives to perpetuate a greater understanding among residents and visitors about the significance of the Hawaiian culture and how integral it is to the uniqueness of Hawai'i's identity compared to destinations worldwide.

2016 HIGHLIGHTS

- Funded 35 community-based Hawaiian culture programs statewide through the Kūkulu Ola: Living Hawaiian Culture Program.
- Continued HTA's longstanding relationship with the Native Hawaiian Hospitality Association to bridge the Hawaiian community and the tourism industry through training, education and outreach.
- Honored Hawai'i surf legends Richard "Buffalo" Keaulana and George Downing, and their 'ohana, with Tourism Legacy Awards for their lifetime contributions to perpetuating the Hawaiian culture.
- Initiated a program to send Hawai'i cultural representatives, entertainers and practitioners to participate in trade shows and missions in countries worldwide, including Taiwan, China, Malaysia, Hong Kong, the United Kingdom, Switzerland and Germany.
- Conducted Ma'ema'e Program training in international markets to foster a deeper understanding and appreciation of Hawai'i's rich heritage and history.
- Continued to support the status of 'Ōlelo Hawai'i (Hawaiian language) as an official state language by integrating it into HTA's daily business activities, including the posting of agendas for monthly board meetings in both Hawaiian and English.

2017 FOCUS

- Expanding and improving integration of the Ma'ema'e toolkit to a web- and mobile-friendly platform. The Ma'ema'e toolkit helps educate industry partners, media and stakeholders about Hawai'i through guidance in proper usage of the Hawaiian language and images. It also contains additional information for promoting the Hawaiian Islands authentically and accurately.
- Establishing a partnership with Hawai'i Investment Ready to facilitate and enhance the capacity of Hawai'i's social enterprises.



NATURAL RESOURCES

HTA's Natural Resources Community Program (NRCP) was established to help preserve the open areas from mauka (inland) to makai (seaward). HTA plays an important role in supporting community-led programs and special initiatives that directly benefit the natural environment across the Hawaiian Islands.

2016 HIGHLIGHTS

- Funded 33 programs statewide focused on supporting community-initiated programs that help maintain and care for Hawai'i's environment.
- Partnered with the Hawai'i State Department of Land and Natural Resources (DLNR) to educate visitors and residents about the importance of preserving Hawai'i's natural resources by sponsoring television documentaries, environmental guide map displays, and in-room and airline videos.
- Sponsored the North Shore Shuttle pilot program on Kaua'i to reduce the number of vehicles traveling to and parking in the Hanalei and Hā'ena-Kē'ē Beach areas.
- Funded and improved the implementation of the Hawai'i Ecotourism Association's statewide Sustainable Tourism Certification Program.

2017 FOCUS

- Expanding HTA's partnership with DLNR to provide insight on specific areas needing attention, and amplifying messaging around safety and responsible visitations.
- Supporting innovative community-based projects that mitigate human impact on Hawai'i's natural resources.
- Seeking opportunities to collaborate with conservation-based organizations on promoting the protection of natural resources for the benefit of future generations.



PRODUCT DEVELOPMENT

HTA conceptualizes, builds and cultivates programs and projects that provide a range of offerings to visitors in an effort to create distinct and memorable travel experiences. HTA provides support to select projects with a goal of each becoming self-sustaining after a few years of initial operation.

2016 HIGHLIGHTS

- The annual Duke's OceanFest, which offered nine days of ocean sports events and competitions along Waikiki Beach in August to honor pioneering Hawai'i waterman and Olympian Duke Kahanamoku.
- The Mele Mei Celebration and Nā Hōkū Music Festival, which celebrated Hawai'i's music, hula and culture throughout the month of May.
- The 75th Pearl Harbor Commemoration, from December 1-11, which featured a series of special tributes, programs, tours, concerts, events and activities honoring the service, sacrifice and memories of Armed Forces members and civilians 75 years after the attack that launched the U.S. into World War II.

CHANGES IMPLEMENTED

- Additional marketing support for festivals and events to build awareness and attendance. Support included capacity, building workshops, global marketing and outreach through HTA's Global Marketing Team.
- An increase in support of community-based projects to further build on Hawai'i's already diverse and impressive statewide offerings.

2017 FOCUS

- Enhancing current travel products and experiences, and cultivating new ones.
- Offering stronger marketing, product development opportunities and resources to the tourism industry and community stakeholders.
- Developing more quality events, program collaborations and experiential opportunities.



COMMUNICATIONS

HTA is committed to keeping the general public, tourism stakeholders and media informed about its initiatives to support the state's tourism industry. This is achieved through a consistent program of communication outreach, which includes distribution of news releases, interaction with media, public presentations and tourism industry briefings.

2016 HIGHLIGHTS

- Developed and issued 64 news releases from January through November on a variety of topics, including HTA's marketing programs, important events, positions on key issues, and vital information during crisis situations, along with Hawai'i's monthly visitor industry statistics. The news releases are available online at www.HawaiiTourismAuthority.org.
- Accommodated 237 media requests with interviews, statements and/or background information to support news coverage by local and national media.
- Managed HTA's international news bureau by providing resource information, guidance and itinerary planning assistance for 352 international media requests.
- Assisted Gov. David Ige and the Hawai'i State Department of Health with informing tourism industry stakeholders and visitors about the importance of preventing the spread of mosquito-borne diseases, including the Zika virus, dengue fever and chikungunya.
- Provided updated information on a daily basis alerting tourism industry stakeholders about the status of Tropical Storm Darby, Hurricane Madeline and Hurricane Lester.

2017 FOCUS

- Reinforcing the direction of the HTA Five-Year Strategic Plan and the messaging of the plan's four goals in HTA's public outreach.
- Communicating the benefits of tourism to the state's economic future and Hawai'i's way of life.
- Emphasizing the obligation to perpetuate Hawaiian culture and preserve Hawai'i's natural resources, while supporting the economic interests of the tourism industry.



BRAND EXPERIENCE PROGRAM LISTINGS

2016 COUNTY PRODUCT ENRICHMENT PROGRAM (CPEP)

O'AHU

Sharing the Plantation Experience
 Hale'iwa Interpretative Signage Project
 New Year's 'Ohana Festival
 City and County of Honolulu Lei Day Celebration
 Duke Kahanamoku Beach Challenge Contact 2016
 2016 Biggest Little Airshow
 35th annual Hawaiian Scottish Festival and Highland Games
 Hawai'i Book and Music Festival
 Waimea Valley May Day Music Festival
 We Are Samoa Festival
 Parade of Farms: Celebrating O'ahu's Agricultural Abundance
 24th annual Filipino Fiesta and Parade
 2016 International Maui Festival
 Hawaiian Mission Children's Society History Theatre
 First Hawaiian Slack Key Guitar Festival: "North Shore Style"
 15th annual Korean Festival
 46th annual 'Ukulele Festival
 2016 Dragon Boat Festival Competition
 Moloka'i to O'ahu Paddleboard World Championships
 Reebok Spartan Race Hawai'i Trifecta Weekend
 First Hawaiian Slack Key Guitar Festival: "Waikiki Style"
 Hapa Haole Hula Festival and Competition
 Hawai'i Chocolate Festival Road Show
 16th annual Windward Ho'olaule'a
 Japanese Cultural Center Aki Matsuri
 Honolulu Culture and Arts District Art and Cultural Festivals

MAUI COUNTY

Art With Aloha
 Hui No'euau Art Exhibitions at Kaluanui 2016
 Maui Arts and Cultural Center 2016 Visual Arts Exhibition Program
 Maui Community Theatre "Theatre on the Isle"
 Lahaina Restoration Foundation Hawaiian Music Series

Maui Pops Orchestra
 The Tennis Championships of Maui
 Wailuku First Friday
 Maui Open Studios
 24th annual Celebration of the Arts
 8th annual Maui Hawaiian Steel Guitar Festival
 Lahaina Restoration Foundation Three Chinese Festivals
 16th annual Maui Matsuri, A Japanese Festival
 Maui Classical Music Festival 2016
 Jazz Maui
 25th annual Hawaiian Slack Key Guitar Festival: "Maui Style"
 Maui 2 Moloka'i Challenge
 Moloka'i 4 Moloka'i Challenge
 Kū Mai Ka Hula 2016
 46th annual Maui Marathon and Half Marathon
 10th annual Pailolo Challenge Maui to Molokai Canoe Race
 Maui 'Ukulele Festival 2016

KAUA'I

Festival of Lights
 Tasting Kaua'i Food Tours
 E Kanikapila Kākou 2016
 Kaua'i Steel Guitar Festival
 Kaua'i Museum Cultural Festivals
 2016 Waimea Town Celebration
 Prince Kūhiō Celebration Kaua'i
 2016 Kaua'i Orchid and Art Festival
 'Aha Hui E Kala – Lāwa'i International Center Cultural Awareness Events 2016
 Mālama Kaua'i Community Farm
 Maile Foundation 2016 Cultural Events - Mokihana Festivals
 May Day by the Bay
 Kaua'i Museum Association/Prince Kūhiō Royal Band Annual Celebration of Prince Kūhiō
 Kōloa Plantation Days Rodeo
 Soto Zen Bon Festival
 Red Clay Jazz Festival
 Heiva i Kaua'i 2016
 Po'ipū Food and Wine Festival
 Kaua'i Pow Wow 2016
 The Coconut Festival

28th annual Eō e 'Emalani i Alaka'i
 Matsuri Kaua'i 2016
 2016 Kaua'i Chocolate & Coffee Festival
 24th annual Hawaiian Slack Key Guitar Festival: "Kaua'i Style"
 Po'ipū Beach Foundation New Year's Eve Music Festival and Fireworks Celebration

ISLAND OF HAWAII

Hawai'i Volcanoes Institute Inspirational Experiences in the Great Outdoors
 Centennial BioBlitz and Cultural Festival: "Where Science & Culture Meet"
 Kahilu Theatre Foundation second half of 35th presenting season and first half of 36th presenting season
 Hands on History at the Kona Coffee Living History Farm
 The Hula Arts at Kīlauea in Hawai'i Volcanoes National Park
 2016 Historic Kailua Village Special Events and Festivities Series
 Hilo Hula Tuesdays and Hawaiian Culture Program
 Pana'ewa Stampede Rodeo
 Kona Town Night Market
 Ka'ū Coffee Festival
 2016 Big Island Film Festival
 Hawai'i Poke Festival
 2016 Haari Boat Festival
 HawaiiCon 2016
 Hawai'i Island Birding Festival: Ho'okula Manu
 Hawai'i Yoga Festival
 Monthly Kailua Village Marketplace

NATURAL RESOURCES COMMUNITY PROGRAM (NRCP)

O'AHU

Honolulu Zoo Children's Discovery Forest Demonstration and Education Program
 "Getting to Know the Ko'olaus" Community Conservation Project
 Mālama Nā Honu Education and Outreach Project
 "Spot the Ant, Stop the Ant" outreach and early detection for little fire ants on O'ahu
 O'ahu Offshore Island Wildlife Sanctuaries Program
 Solutions to Rising Storm Water Impact: Ocean Friendly Gardens and Surfblitz

Mana'o Mobile education station: Interactive mobile classroom for educating O'ahu

MAUI COUNTY

Mālama Auwahi community-based stewardship of Maui wahi pana forest
 East Maui Watershed Partnership – Pu'u Pahu Reserve protection and view-corridor enhancement, Phase II
 Ho'okuleana: Ho'okipa Honu
 Lāna'i Cat Sanctuary protection and promotion of Lāna'i's natural resources
 Leeward Haleakalā Watershed Restoration Partnership remotely based outreach program to implement innovative reforestation and invasive species control
 Maui Nui Botanical Gardens seed storage of and increased community access to rare native Hawaiian coastal plant species
 Moloka'i Land Trust habitat improvements for Laysan albatross at Moku Preserve, Phase II
 Project S.E.A.-Link advancing of mauka-to-makai environmental stewardship and ocean safety on Maui
 Mālama Honolulu
 'Ahihi-Kina'u Information Education and Volunteer Program
 Pahana Ho'ala Seeds of Hope 2016
 The Nature Conservancy of Hawai'i visitor engagement and invasive weed removal in Waikamoi Preserve, Maui

KAUA'I

Hui Maka'ainana O Makana community co-management approaches for Hā'ena
 Hui O Laka Kōke'e State Park Interpretive Program 2016
 Lehua Island Restoration
 Kōke'e Resource Conservation Program Volunteers for Biodiversity
 Makauwahi Cave Reserve preparation for increased visitation

ISLAND OF HAWAII

Big Island Invasive Species Committee community-led control of little fire ants near island of Hawai'i conservation areas
 Conservation International Foundation sustainability building of near-shore fisheries and marine resources in South Kona
 Kekaha Kai State Park Anchialine Pools Restoration Project

Implementation of 'Ōuli Park Community-Based Management Plan
 Ka'ū Scenic Byway Lava Flow Signs
 'O Ka'ū Kākou Ka'ū Sanitation Program
 Kahalu'u Bay Education Center
 University of Hawai'i at Mānoa CTAHR outreach and research to prevent the spread of rapid 'ōhi'a death

STATEWIDE

Hawai'i Pacific University continuing whale and dolphin stranding response

KŪKULU OLA: LIVING HAWAIIAN CULTURE PROGRAM (LHCP)

O'AHU

Bishop Museum Nā Hulu Ali'i: Royal Hawaiian Featherwork
 Hawai'i Academy of Performing Arts New Maoli ARTS Series Exhibition Project at The ARTS at Marks Garage
 Hawai'i Theatre Hawaiian Music Series
 Nā Mele Aloha
 Ho'okua'aina Lo'i Kalo Internship Program and Poi Production
 Waiwai O Wai'anae
 41st Annual Queen Lili'uokalani Keiki Hula Competition
 Pāhola Ke Aloha
 Kumu Kahua Theatre 45th season
 Mana Maoli Ho'okele I Ka 'Āina Tour: Navigating the Land with Mana Mele
 Mānoa Heritage Center enhancement of Hawai'i's cultural and historical education
 Hawaiian Music Masters Youth Outreach and Community Reinvestment
 Hawaiian Media Makers Series 2016: The second Hawaiian Media Makers Conference and Brown Book Creation
 Hakipu'u Lo'i Kalo
 Ulu A'e After-school Program

MAUI COUNTY

Maui Nei Cultural Education Program
 Holani Hana "Ho'omau I Ka Hale Kahiko": Training a New Generation of Master Hale Builders
 Hui o Wa'a Kaulua "Sharing a Living Cultural Treasure": Expanding our Voyaging, Education and Outreach Programs
 Lāna'i Culture and Heritage Center "E 'Ike Hou Lāna'i": Embracing Lāna'i's History Through Language and Literacy Program

Maui Arts and Cultural Center "Celebrate Hawai'i"
 Maui Historical Society "E Ho'oulu 'Ike": Cultural Enrichment Mornings at the Museum
 Maui Nui Botanical Gardens promotion of visitor and community connection to traditional Hawaiian crops

KAUA'I

Makaweli Mahi'ai Experience
 Nāmāhoe Kaua'i Project

ISLAND OF HAWAII

Edith Kanaka'ole Foundation "Īmaka" (To Oversee)
 Ka Pilina Poina 'Ole "Connections Not Forgotten"
 Mālamalama Kīholo
 The Mālolo Project
 Kahuli

STATEWIDE

Hale Mua Project
 Ka Pā o Lonopūhā
 The KIRC Virtual Museum
 MAMo (Maoli Arts Movement) 2016
 2016 Mele Murals Program
 Huli'ia: A traditional tool to support mālama 'āina

Natural Resources Advisory Group

Mark Fox, *The Nature Conservancy of Hawai'i*
 Curt Cottrell, *Division of State Parks, DLNR*
 Annette Ka'ohelau'i, *Hawai'i Ecotourism Association*
 Vincent Shigekuni, *PBR Hawai'i*
 T. 'Aulani Wilhelm, *Papahānaumokuākea Marine National Monument*
 Marti Townsend, *The Sierra Club Hawai'i Chapter*

Hawai'i Cultural Program Advisory Council

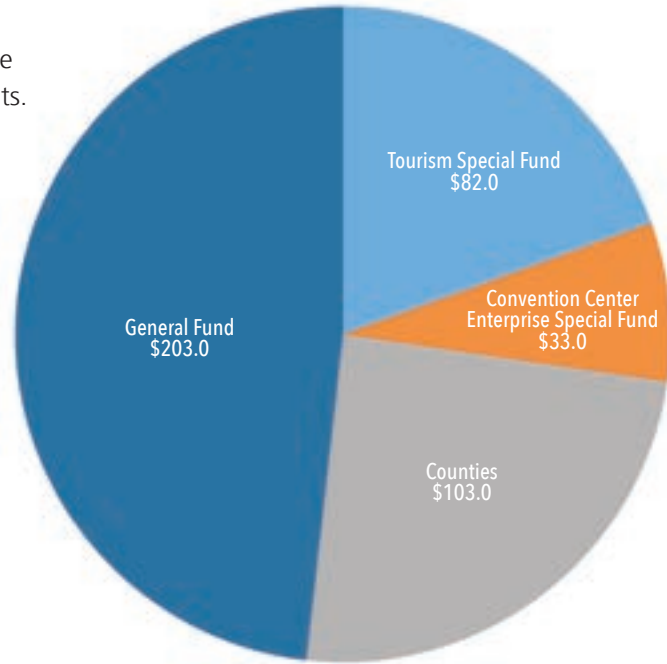
Nā'ālehu Anthony, *Palikū Documentary Films*
 Kainoa Daines, *O'ahu Visitors Bureau*
 Leona Māpuana Kalima, *Hawaiian Cultural Consultant*
 Cheryl L. Ka'uhane-Lupenui, *Board of Education*
 Debbie Nākanelua-Richards, *Hawaiian Airlines*

TRANSIENT ACCOMMODATIONS TAX COLLECTIONS

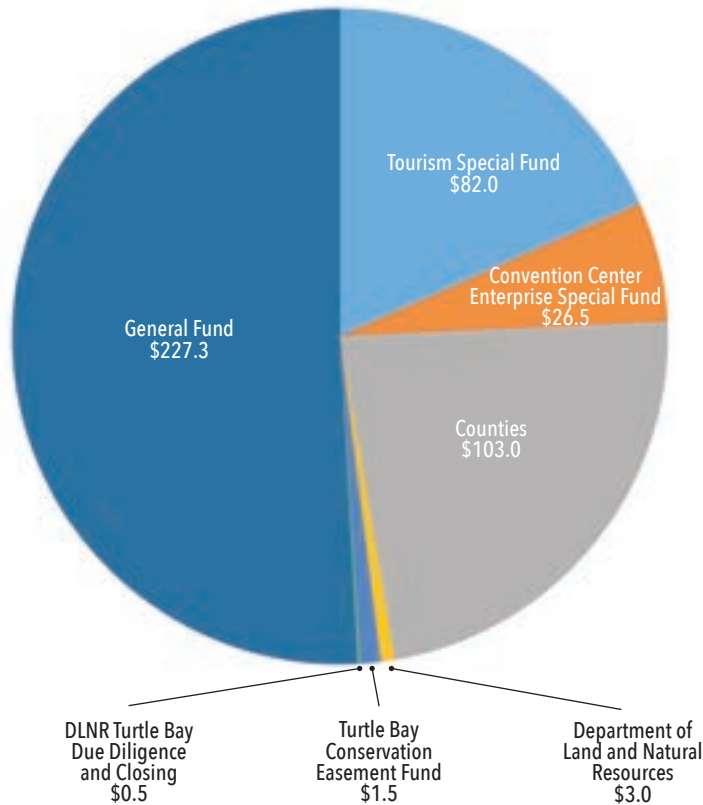
The collection of the Transient Accommodations Tax (TAT) benefits Hawai'i as a whole and, ultimately, individual counties and state residents. Importantly, the revenue makes it into local communities on each island to support schools, police, infrastructure and parks, and contributes to an improved quality of life for residents. In FY 2016, Hawai'i collected a total of \$446.8 million in TAT, marking a 6.2 percent increase over FY 2015's total collection of \$420.9 million. In FY 2016, the state's General Fund received \$227.3 million in TAT.

The annual allocation of TAT to the Tourism Special Fund and Convention Center Enterprise Special Fund is \$82 million and \$26.5 million, respectively. The allocation of TAT to the Convention Center Enterprise Special Fund remains the same at \$26.5 million. Additionally, \$103 million of TAT is allocated to the counties and \$3.5 million is allocated to the DLNR, including \$500,000 for due diligence and closing costs related to the Turtle Bay conservation easement purchase. An allocation of \$1.5 million is made to the Turtle Bay Conservation Easement Special Fund.

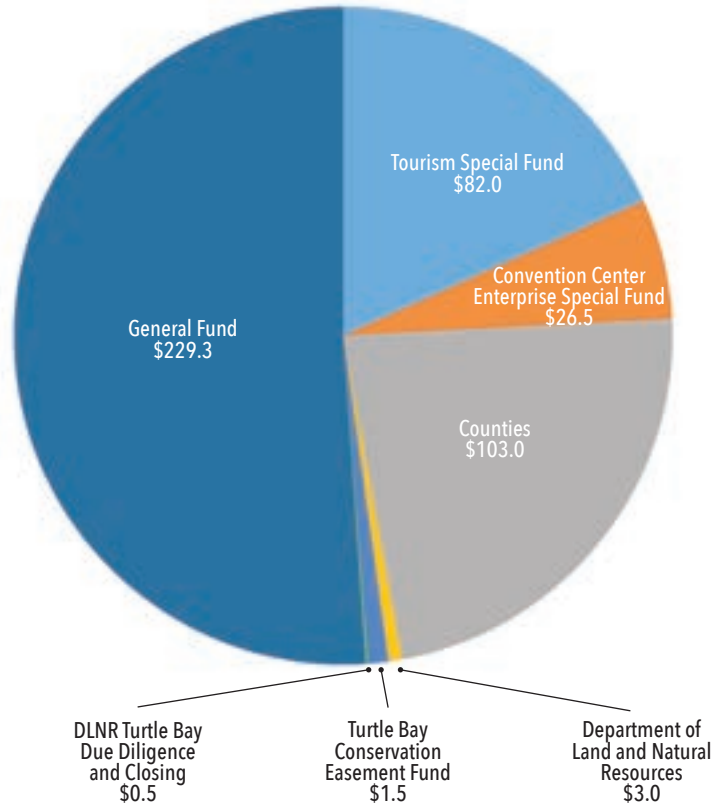
FY 2015
TAT DISTRIBUTION (\$ MIL.)



FY 2016
TAT DISTRIBUTION (\$ MIL.)



FY 2017
PROJECTED TAT DISTRIBUTION (\$ MIL.)



ENSURE STABLE ECONOMIC BENEFITS

‘A‘ohe ‘auwa‘a pa‘a i ka hālau i ka mālie.

No canoes remain in the sheds in calm weather.

Hawai'i tourism is most successful when all stakeholders collaborate, partner and collectively work for the common purpose of feeding the community. Everyone fishes together.

BRAND MANAGEMENT

The purpose of the Hawai'i Tourism Authority's Brand Management efforts is to attract global travelers to the Hawaiian Islands through strategic, integrated and impactful destination marketing initiatives that tie in closely with access and business development. HTA's detailed implementation plans with specified indicators demonstrate its focus on meeting its goals and objectives in this area.



MAJOR MARKET MANAGEMENT

A fifth consecutive year of record-breaking growth in both visitor arrivals and spending put an exclamation mark on Hawai'i's tourism story in 2016, with the industry remaining the state's lead economic driver. HTA's Global Marketing Team has worked diligently to keep the state's level of growth on a positive trajectory to ensure economic stability for the Hawaiian Islands and sustainability for the tourism industry.

In 2016, HTA's Global Marketing Team included representation in nine major marketing areas (MMAs), provided by the Hawai'i Visitors and Convention Bureau (North America), Hawai'i Tourism Japan, Hawai'i Tourism Oceania (Australia and New Zealand), Hawai'i Tourism Korea, Hawai'i Tourism China, Hawai'i Tourism Taiwan, Hawai'i Tourism Southeast Asia, Hawai'i Tourism Hong Kong, and Hawai'i Tourism Europe (United Kingdom, Germany Switzerland, France and Italy).

HTA's Global Marketing Team is in charge of developing strategic plans and cooperative programs to promote travel to Hawai'i in their respective regions. These plans and programs include public relations, advertising, promotions, travel trade and MCI (meetings, conventions and incentives) marketing, education and training, and stakeholder communications and relations.

NORTH AMERICA

North America is Hawai'i's largest source market for visitors, with domestic air seats accounting for 69 percent of total seats to the state. With the U.S. dollar strengthening and foreign currencies falling, competition from other destinations remains an obstacle. In 2016, HTA worked with the Hawai'i Visitors and Convention Bureau (HVCB) as its marketing contractor for North America.

2016 HIGHLIGHTS

- Recognized as the "Destination with the Highest Client Satisfaction, USA" and "U.S. Tourism Board Providing the Best Travel Agent Support" in *TravelAge West* magazine's 2016 WAVE Awards.
- Unveiled a new #LetHawaiiHappen social video series, *A Day with a Local*, pairing a visiting influencer with a local ambassador to experience destinations on several islands.
- Produced an integrated program for cable television channel HGTV that included TV, print, digital, social and public relations elements through the *HGTV Magazine Blogger Block Party* in New York City.
- Targeted story pitches with the Top 100 media contacts and outlets, resulting in published features in *The Wall Street Journal*, *USA Today*, *The Dallas Morning News*, *San Francisco Chronicle*, *AFAR*, *The Philadelphia Inquirer*, *Coastal Living*, *W*, *Vancouver*, *Toronto Star*, *WestJet Magazine*, *The Globe and Mail*, *Montreal Gazette* and *Edmonton Journal*.
- Increased Meet Hawai'i's presence at IMEX America with a record number of appointments with meeting planners.

2017 FOCUS

- Intensifying focus on content by aggregating images and videos from visitors, influencers and residents, and developing programs with Hawai'i celebrities, personalities and ambassadors.
- Building upon current media strategy and utilizing new channels, including virtual reality.
- Launching a multiyear brand building program focused on metro New York City, which has the largest concentration of Hawai'i target travelers in the U.S.



VISITOR STATISTICS

U.S. WEST	2015 Final	2016 Forecast	% Change*	2016 YTD**	% Change
Visitor Expend.* (\$ mil.)	5,275.7	5,504.2	4.3%	4,137.7	5.4%
Arrivals	3,507,652	3,619,369	3.2%	2,741,331	4.1%
PPPD Spending (\$)	162.0	165.2	2.0%	165.6	2.5%
Air Seats***	7,217,348	7,221,233	0.1%	5,569,973	2.0%
U.S. EAST	2015 Final	2016 Forecast	% Change*	2016 YTD**	% Change
Visitor Expend.* (\$ mil.)	3,674.6	3,814.0	3.8%	2,924.4	5.7%
Arrivals	1,803,670	1,839,913	2.0%	1,432,534	3.5%
PPPD Spending (\$)	197.8	201.0	1.6%	199.0	2.6%
Air Seats***	928,088	922,744	-0.6%	687,291	-1.9%
CANADA	2015 Final	2016 Forecast	% Change*	2016 YTD**	% Change
Visitor Expend.* (\$ mil.)	1,053.2	942.8	-10.5%	689.7	-13.2%
Arrivals	512,323	472,395	-7.8%	343,211	-8.9%
PPPD Spending (\$)	161.5	156.2	-3.3%	158.3	-4.6%
Air Seats***	459,636	464,709	1.1%	347,415	1.5%

* Year-over-year growth
 ** January-September 2016
 *** Source: Scheduled seats from Diio schedule



JAPAN

Japan is Hawai'i's largest international visitor market, comprising 17 percent of total arrivals to the Hawaiian Islands in 2015. Visitor arrivals showed a modest positive growth throughout 2016, while a weakening U.S. dollar against the yen resulted in a recovery of Japan market spending. In 2016, HTA worked with Hawai'i Tourism Japan (HTJ) as its marketing partner for Japan.

2016 HIGHLIGHTS

- Launched the Yukyu Campaign promoting Hawai'i as the best vacation destination for Japan citizens seeking a healthy and balanced work-to-leisure lifestyle.
- Hosted new initiatives, the Hawai'i Summit and Japan-U.S. International Symposium. The Hawai'i Summit provided local industry partners with opportunities to conduct business with travel agents on product development. The symposium brought prominent women leaders from Japan and Hawai'i together, including Akie Abe, wife of the Prime Minister of Japan.
- Welcomed nearly 14,000 consumers to HTJ's second annual Hawai'i Expo in Tokyo, a consumer show promoting the best of the Hawaiian Islands.
- Continued creative campaigns and partnerships with retail businesses – including McDonald's, Hawaiian Springs and Confex Confectionery – officially endorsing products exemplifying and heightening awareness of the Hawaiian Islands.
- Leveraged more than 11,400 Aloha Program specialists, in 22 satellite offices throughout Japan, to promote Hawai'i.
- Relunched the allhawaii.jp portal site with a content management system enabling effective updates by industry partners.

2017 FOCUS

- Launching of the newest all-inclusive Gohoubi campaign, inspiring travelers to reward themselves with a trip to Hawai'i to celebrate special occasions. The campaign will target seniors, couples, families and women in their late 20s and 30s.
- Expanding the Aloha Program with edu-tourism and MCI business.

VISITOR STATISTICS

JAPAN	2015 Final	2016 Forecast	% Change*	2016 YTD**	% Change
Visitor Expend.* (\$ mil.)	2,052.7	2,035.5	-0.8%	1,523.9	0.3%
Arrivals	1,482,304	1,459,873	-1.5%	1,106,491	0.3%
PPPD Spending (\$)	236.3	238.2	-0.8%	233.7	0.2%
Air Seats***	1,949,420	1,842,069	-5.5%	1,373,213	-7.0%

* Year-over-year growth
 ** January-September 2016
 *** Source: Scheduled seats from Diio schedule

KOREA

More than 1.7 million Korean citizens traveled to the U.S. in 2016, with about 11 percent of those travelers visiting the Hawaiian Islands. Hawai'i Tourism Korea (HTK), HTA's marketing partner for Korea, sees an opportunity to grow Hawai'i's share of the Korean travel market by focusing on expanding airlift, increasing visitor expenditures, and strengthening demand for travel to Hawai'i.

2016 HIGHLIGHTS

- Developed various celebrity promotions including:
 - Japanese mixed martial artist Choo Sung Hoon and his wife Shiho Yano, a Japanese fashion model, promoting Hawai'i by leveraging their social media channels. The promotion tallied more than 900,000 views and \$700,000 in publicity value.
 - A pictorial with leading Korean consumer travel magazine *The Traveller* featuring singer-actor Son Dam-bi. The pictorial generated more than \$450,000 in publicity value.
- Supported Hawai'i filming of the Korean reality TV series *Father and Me* for seven episodes, resulting in \$1.5 million of publicity value.
- Launched the #AlohaEverywhere social media campaign on Facebook, which generated more than 1,100 posts and included:
 - Promotion of the campaign hashtag with leading Korean portal site Naver, featuring singer-songwriter Sang Eun Lee. The promotion generated more than 1.2 million views.
 - Implementation of a film project with Dingo Travel featuring Korean singer-songwriter Eddie Kim, generating 6 million views and more than 120,000 Facebook likes.
- Worked with SM Entertainment and YG Entertainment to bring K-pop stars to Hawai'i for a destination promotion.
- Sponsored the Honolulu concert stop of the BIGBANG Made [V.I.P.] Tour on October 22. BigBang is one of the most popular boy bands in South Korea and Pan-Asia. More than 5,000 international fans traveled to Hawai'i to attend the concert. The PR value generated from media coverage amounted to more than \$5 million.

2017 FOCUS

- Further developing family and edu-tourism packages.
- Expanding the #AlohaEverywhere social media campaign.
- Implementing a new MCI incentive program focused on entertainment and education.

VISITOR STATISTICS

KOREA	2015 Final	2016 Forecast	% Change*	2016 YTD**	% Change
Visitor Expend.* (\$ mil.)	395.4	465.9	17.8%	330.5	22.4%
Arrivals	193,658	223,096	15.2%	159,003	19.0%
PPPD Spending (\$)	293.9	298.3	1.5%	289.2	1.5%
Air Seats***	297,964	384,292	29.0%	280,328	27.5%

* Year-over-year growth
 ** January-September 2016
 *** Source: Scheduled seats from Diio schedule





CHINA

In 2016, HTA selected BrandStory Asia as its new marketing contractor to provide destination representation services as Hawai'i Tourism China (HTC). Online and social media consumer promotions, as well as co-op programs with travel-trade partners, were increased to position Hawai'i as a premium stand-alone vacation destination and drive travel demand. Slowdown of economic growth in China did not significantly impact the rise of independent travelers from the market.

2016 HIGHLIGHTS

- Launched the 6 Travel-Spirations social media campaign in July, which promoted Hawai'i with interactive and engaging digital mobile games targeting millennials. The campaign's partners were Mafengwo, a top user-generated content travel website, and Ctrip, China's largest online travel agency. Within the campaign's first three days, page views climbed to 10.26 million. To date, more than 30,000 consumers have played the game.
- Collaborated with Jiangsu Television to bring China's top romantic television series *We Are in Love* to Hawai'i, featuring celebrity couple Shawn Yue and Zhou Dongyu. Buzz surrounding the series resulted in 7.67 billion page views on *We Are in Love*'s Weibo account and more than 5 million posts and comments.
- Conducted a Camp Aloha sales mission in Beijing, Shanghai and Chengdu with 47 stakeholders representing 23 Hawai'i businesses and more than 300 Chinese trade and media partners. More than 1,400 one-on-one meetings were conducted during the event. Ma'ema'e Program training and Hawaiian cultural performances were integral parts of the mission for 2016.

2017 FOCUS

- Executing an impactful series of consumer marketing campaigns surrounding Le Huo supporting direct air service to Hawai'i by depicting the Hawaiian Islands as a healthy and friendly place for travelers to rejuvenate and re-energize.
- Enhancing Camp Aloha as an educational immersion platform to bridge Hawai'i stakeholders with tour operators, agents and online travel agencies in emerging tier two cities in China.
- Actively engaging trade partners in Hong Kong and Southern China to create new Hawai'i offerings and stimulate travel interest from the Pearl River Delta Region to Hawai'i.

VISITOR STATISTICS

CHINA	2015 Final	2016 Forecast	% Change*	2016 YTD**	% Change
Visitor Expend.* (\$ mil.)	427.8	417.7	-2.4%	334.0	-3.0%
Arrivals	173,520	177,874	2.5%	138,141	-1.2%
PPPD Spending (\$)	392.0	368.1	-6.1%	367.4	-6.1%
Air Seats***	150,390	173,421	15.0%	125,488	10.1%

* Year-over-year growth
 ** January-September 2016
 *** Source: Scheduled seats from Diio schedule

TAIWAN

Despite a continued slowdown in GDP growth and intensified competition in the Taiwan market, Hawai'i experienced a significant 20.2 percent increase in year-over-year visitor expenditures during the first nine months of 2016. Visitor arrivals and airline seat capacity remained unchanged compared to 2015. Hawai'i Tourism Taiwan (HTT), HTA's marketing partner in Taiwan, continues to focus on collaborations with leading trade partners and implementation of integrated, creative online and offline consumer campaigns to keep Hawai'i top-of-mind among Taiwanese consumers.

2016 HIGHLIGHTS

- The second Hawai'i Crystal Run drew more than 5,100 runners in Taipei and earned event sponsorships from major consumer brands, including Swarovski, Shiseido and Roxy.
- Appointed Ruby Lin, a celebrated Taiwanese actress and entrepreneur, as HTT's brand ambassador for 2016. Images of Lin wearing fresh flower lei were incorporated into all of HTT's major consumer campaigns and promotional materials. The campaigns reached more than 18 million consumers, generating an estimated media value of \$21.6 million.
- Secured Nu Skin Greater China's incentive trip for Hawai'i in April 2017 with more than 5,000 people confirmed to attend.
- Collaborated with Hotel Fulong in New Taipei City on a six-week promotion, which incorporated Hawai'i influences on-property to enhance guest experiences, including tropical-themed lobby décor, an island-inspired dining menu, and multiple hotel activities. The hotel's staff took hula lessons and shared the dance with guests. Contests offered guests an opportunity to win prizes, including an 'ukulele and airline tickets to Hawai'i.

2017 FOCUS

- Strengthening the Share the Aloha campaign to drive incremental arrivals to Hawai'i.
- Expanding cross-industry cooperation to leverage each industry's brand assets and promotional channels to elevate Hawai'i's brand awareness and image.
- Implementing creative online campaigns targeting LGBT travelers and couples, and increasing Hawai'i's exposure as an ideal romantic getaway-vacation destination.

VISITOR STATISTICS

TAIWAN	2015 Final	2016 Forecast	% Change*	2016 YTD**	% Change
Visitor Expend.* (\$ mil.)	30.9	37.3	20.7%	29.0	20.2%
Arrivals	17,525	17,620	0.5%	13,556	0.5%
PPPD Spending (\$)	221.8	269.3	21.4%	269.2	21.4%
Air Seats***	31,308	30,626	-2.2%	23,202	-3.1%

* Year-over-year growth
 ** January-September 2016
 *** Source: Scheduled seats from Diio schedule





OCEANIA

Hawai'i Tourism Oceania (HTO), HTA's marketing partner for Australia and New Zealand, is dedicated to attracting travelers to the Hawaiian Islands by maintaining strong industry partnerships, implementing creative marketing campaigns, and investing significant resources aimed toward building awareness and desire in the region. Despite challenges resulting from the softening of the Australian and New Zealand dollars against the U.S. dollar, the visitor forecast for Oceania points to a strong 2017. HTO will continue its focus on keeping Hawai'i top-of-mind Down Under as a value-for-money destination and highlight the experiences, beauty and culture found in the Islands.

2016 HIGHLIGHTS

- The 2016 Aloha Down Under Workshops, which were the most successful to date, bringing together 28 industry partners from Hawai'i and more than 800 travel agents from throughout Australia and New Zealand for destination information training sessions.
- Having Hawai'i's natural beauty showcased on several late-season episodes of *The Bachelor New Zealand* and live weather crosses of the Australian morning show *Today*, the latter featuring Australian television presenter Livinia Nixon.
- The University of Hawai'i Rainbow Warriors and University of California Golden Bears opening their 2016 college football seasons with a special match-up at the ANZ Stadium in Sydney. HTO hosted media and travel industry events before, during and after the game, featuring Hawai'i as a premier visitor destination.
- Launched HTO's first-ever consumer brand campaign, which generated 14.8 million paid media impressions, more than 216,000 unique page views on an HTO dedicated microsite, and 57,920 competition entries for an opportunity to win a trip to Hawai'i.

2017 FOCUS

- Strengthening and elevating Hawai'i's brand image.
- Maintaining outbound market share against competitive destinations and a lower Australian and New Zealand dollar.
- Working closely with airline partners to retain direct access to Hawai'i.

VISITOR STATISTICS

OCEANIA	2015 Final	2016 Forecast	% Change*	2016 YTD**	% Change
Visitor Expend.* (\$ mil.)	1,001.3	1,054.2	5.3%	784.4	4.0%
Arrivals	399,619	407,910	2.1%	305,763	2.1%
PPPD Spending (\$)	262.8	267.3	1.7%	269.6	1.7%
Air Seats***	503,300	525,148	4.3%	393,931	5.8%

* Year-over-year growth
 ** January-September 2016
 *** Source: Scheduled seats from Diio schedule

EUROPE

Hawai'i Tourism Europe (HTE) is HTA's marketing contractor targeting visitors from the United Kingdom, Germany, France, Switzerland, Italy and Scandinavian region. In 2016, HTA selected Hills Balfour as its new destination representative for the European market. Overall, European arrivals to Hawai'i were down slightly in 2016 compared to 2015. Factors contributing to the dip included the strength of the U.S. dollar over the Euro and British pound, the impact of Brexit on United Kingdom travel, and issues relating to terrorism in Europe. Despite this, discussions with European tour operators revealed that Hawai'i sales are stronger than other U.S. destinations.

2016 HIGHLIGHTS

- Introduced the Hawai'i Challenge online game to the United Kingdom and German consumer and travel trade markets. The game challenged users to learn about Hawai'i and create a vacation itinerary. Hawai'i Challenge experienced nearly 40,000 game plays, generating 3.6 million impressions and 65,000 hub interactions with more than 26,000 United Kingdom and 12,000 German players.
- Launched a consumer promotion partnership with United Kingdom-based tour operator Virgin Holidays, which included television and online advertising, social media (Facebook and Instagram), and Hawai'i imagery on plasma screens placed in 100 of its retail stores. Maui was featured in a live Virgin Holidays advertisement during the British reality TV music competition *The X Factor*, earning 6.3 million views.
- Introduced a collaborative partnership with Germany-based Condor Airlines on out-of-home advertising, utilizing billboards and tram wraps in the Frankfurt area, and offers enticing people to visit Hawai'i.
- Conducted a productive Aloha Europe sales and media roadshow, which brought 12 Hawai'i industry partners through Paris, London, Zurich and five German cities. The program successfully trained 450 travel agents, engaged with media at four events, and met with key tour operator product and marketing managers.

2017 FOCUS

- Launching of Hawai'i Through the Lens in the first quarter, a multifaceted campaign with tour operators to create consumer and trade interaction leveraging social media, virtual reality and print/online advertising.
- Introducing a promotional partnership with popular gummy bear candy manufacturer Haribo to create a special Haribo Hawai'i Mix in September 2017. Promotions will focus on social media advertising and in-store promotions.
- Continuing trade sales incentives to drive bookings to Hawai'i by highlighting experiences on HTE's Hawai'i Top 40 List – a compilation of the best things to do in the Hawaiian Islands – and incentivizing agents with 40 special prizes.



VISITOR STATISTICS

EUROPE	2015 Final	2016 Forecast	% Change*	2016 YTD**	% Change
Visitor Expend.* (\$ mil.)	337.2	351.1	4.1%	260.2	1.2%
Arrivals	145,019	141,067	-2.7%	109,488	-2.5%
PPPD Spending (\$)	177.7	185.2	4.2%	185.2	4.2%

* Year-over-year growth
 ** January-September 2016



SOUTHEAST ASIA

HTA added Southeast Asia as a new market in 2016, acknowledging the potential for increased travel spending among the region's rapidly growing middle class. Aviareps was selected as HTA's marketing partner for Hawai'i Tourism Southeast Asia (HTSEA). Core activities for Malaysia and Indonesia – given the similarity of both markets and their heavy dependency on group travel – are focused on building a strong foundation through a series of travel trade initiatives. Conversely, the primary concentration for the Singapore and Thailand markets is to heavily encourage direct engagement with consumers and elevate brand awareness via digital and social media marketing to drive visits to Hawai'i.

2016 HIGHLIGHTS

- Conducted the first Aloha Sales Mission in Malaysia with 14 Hawai'i partners and 96 key travel agents in attendance. The mission generated more than \$11,000 in earned media and resulted in a booking from Amway, which will bring 1,000 participants to Hawai'i in 2017.
- Established an Aloha Club with 12 leading travel companies committed to increasing their marketing resources to promote Hawai'i. To date, 21 new Hawai'i itineraries have been created by Aloha Club members. Additionally, 25 Aloha Club travel professionals have completed Hawai'i's online travel agent training program.
- Participated in and showcased Hawaiian music and hula at the MATTA Fair Expo, the largest consumer travel fair in Malaysia, which annually draws more than 100,000 visitors over three days. HTSEA conducted a joint press conference with the U.S. Embassy in Malaysia and generated publicity in 14 media outlets.

2017 FOCUS

- Expanding and enhancing the Aloha Sales Mission beyond Malaysia to include Singapore.
- Executing a region-wide consumer campaign showcasing Hawai'i via a photo journey highlighting the unique attributes of the Hawaiian Islands.
- Engaging the public through events highlighting Hawaiian cultural elements – such as lei making, hula, culinary tastings and storytelling about Hawai'i's rich history – to increase destination visibility and brand awareness.

VISITOR STATISTICS

SOUTHEAST ASIA*** 2015 Final	2016 Forecast	% Change*	2016 YTD**	% Change
Visitor Expend.* (\$ mil.)	N/A	N/A	N/A	N/A
Arrivals	17,077	N/A	20,416	106.6%
PPPD Spending (\$)	N/A	N/A	N/A	N/A

* Year-over-year growth
 ** January-September 2016
 *** Malaysia, Singapore, Indonesia and Thailand

BUSINESS DESTINATION MANAGEMENT

MEET HAWAI'I

Meet Hawai'i is a collaborative effort between HTA, HVCB and the Hawai'i Convention Center/AEG Facilities to build and support the brand of the Hawaiian Islands as a premier destination for business meetings, conventions and incentive programs. Meet Hawai'i's objectives include generating new statewide business opportunities for Hawai'i's meetings industry, creating demand and ensuring growth in the convention center segment, and promoting the Hawaiian Islands as a world-class destination for hosting MCI programs.

2016 HIGHLIGHTS

- Successfully hosted the IUCN World Conservation Congress from September 1-10 at the Hawai'i Convention Center. In addition to marking the first time the quadrennial event was held in the U.S., Hawai'i's hosting of the IUCN World Conservation Congress drew more than 9,000 attendees from around the world.
- The expanded Hawai'i Tourism Conference was held at the Hawai'i Convention Center from September 26-30, drawing 2,100 attendees. The conference featured sessions hosted by world-renowned MCI panelists and opportunities to network with HTA's global MCI marketing contractors.
- Group business increased in 2016, rebounding from a forecasted downturn in meetings for the year. World events leading to rebookings in Hawai'i and an aggressive Global Marketing Team seeking new opportunities, enhanced single-property and citywide business for the year.

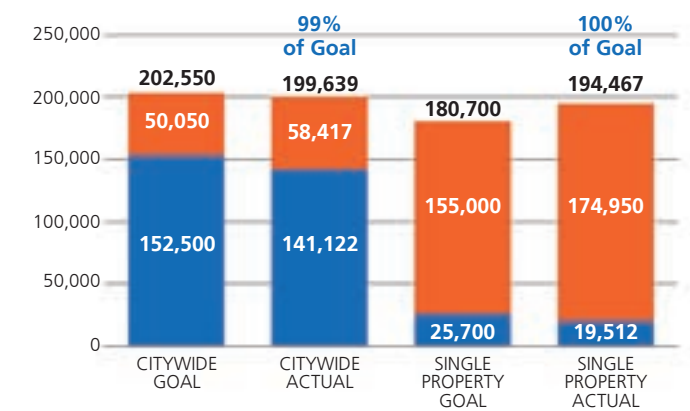
CHANGES IMPLEMENTED

- Business Events Hawai'i was awarded the contract to manage HTA's global MCI marketing contractors and citywide sales for Meet Hawai'i.
- The Hawai'i Convention Center purchased sports courts with a goal of attracting domestic and international indoor sporting events and tournaments, including indoor soccer, volleyball, basketball and badminton.

2017 FOCUS

- Enhancing collaboration and productivity under the Meet Hawai'i structure and building upon Hawai'i's brand as a meetings, incentives, conventions and exhibitions destination.
- Leveraging the Hawai'i Convention Center as a premier venue for sporting events and tournaments, and building sports bookings from around the world.
- Identifying opportunities for efficiencies and implementing changes to the current meetings and conventions structure.

2015 Meet Hawai'i Room Production



EVENT LISTING

	START	END	DELEGATES	TAX REVENUE STATEWIDE
BMT Tandem Meetings 2016	2/15/16	2/23/16	4,500	2,061,060
Honolulu 2016	3/3/16	3/5/16	600	274,808
Honolulu Festival 2016	3/11/16	3/13/16	5,000	2,290,067
Corporate Group 2016	4/15/16	4/22/16	1,000	458,013
International Group 2016	5/9/16	5/10/16	250	114,503
Honolulu Ekiden and Music Festival 2016	5/21/16	5/21/16	1,000	458,013
International Group 2016	5/23/16	5/30/16	1,000	458,013
Foursquare Connection 2016	5/28/16	6/2/16	5,000	2,290,067
AVID 2016	6/5/16	6/8/16	1,000	458,013
Global Dance + Cheer Games	6/11/16	6/12/16	1,000	458,013
Pan-Pacific Festival Workshop	6/11/16	6/11/16	150	68,702
Aloha Summer Volleyball Classic Tournament 2016	6/17/16	6/20/16	1,700	778,623
Aloha International Piano Festival 2016	6/18/16	6/25/16	300	137,404
International Coral Reef Symposium 2016	6/18/16	6/25/16	2,000	916,027
International Group 2016	6/28/16	6/28/16	1,540	705,341
International Group 2016	7/16/16	7/16/16	240	109,923
International Group 2016	8/7/16	8/9/16	4,000	1,832,054
IUCN World Conservation Congress 2016	9/1/16	9/10/16	9,000	3,664,107
CPCU Society Annual Meeting and Seminars 2016	9/17/16	9/20/16	13,500	6,183,181
CPCU Society Annual Meeting and Seminars 2016 overflow	9/17/16	9/20/16	2,460	1,126,713
CPCU Society Annual Meeting and Seminars 2016 overflow	9/17/16	9/20/16	8,300	3,801,511
PRIME 2016	10/9/16	10/14/16	3,000	1,374,040
TOTAL DEFINITE BOOKINGS FOR 2016:	20		65,540	30,018,197
SCCM 2017 Annual Congress	1/20/17	1/25/17	5,800	2,656,478
SCCM 2017 Annual Congress overflow	1/20/17	1/25/17	1,000	458,013
ASLO Meeting 2017	2/25/17	3/3/17	2,000	916,027
Honolulu 2017	3/16/17	3/18/17	600	274,808
ISMRM 25th Scientific Meeting and Exhibition	4/21/17	4/28/17	6,100	2,793,882
International Society for Laboratory Hematology 2017	5/4/17	5/6/17	1,200	549,616
IEEE MTT-S International Microwave Symposium 2017	6/3/17	6/9/17	10,000	4,580,134
NAFCU Annual Conference and Solutions Expo 2017	6/11/17	6/16/17	1,300	595,417
Plant Biology 2017	6/22/17	6/28/17	1,800	824,424
Aloha Volleyball Tournament 2017	7/1/17	7/3/17	1,700	778,623
International Group 2017	7/15/17	7/15/17	3,500	1,603,047
IEEE CVPR 2017	7/19/17	7/27/17	2,500	1,145,033
Corporate Group 2017	9/29/17	10/5/17	1,200	549,616
Corporate Group 2017	10/16/17	10/17/17	3,000	1,374,040
Art Hawai'i - 1st annual	10/28/17	11/6/17	10,000	4,580,134
AMA Interim Meeting of the House of Delegates 2017	11/6/17	11/15/17	3,000	1,374,040
Offshore Group 2017	12/2/17	12/6/17	1,400	641,219
TOTAL DEFINITE BOOKINGS FOR 2017:	16		56,100	25,694,551

ONLINE/WEBSITE PROJECTS

The way people consume digital media continues to rapidly shift. Strategies focused on page views, unique visitors and homepage entry are less relevant today and will play an even smaller role in the future. Hawai'i's target travelers are discovering and making travel decisions by researching on social networks, engaging with live videocasts, and browsing related content throughout the day.

For Hawai'i to remain competitive, a digital marketing strategy must address this fundamental shift in behavior. To accomplish this, HTA works with its Global Marketing Team to manage and maintain all of the websites promoting the Hawaiian Islands. This includes the GoHawaii.com leisure and travel trade sites, MeetHawaii.com, and the HawaiiTourismAuthority.org websites. To ensure a unified message, marketing strategy and branding, HTA also works with its global partners on marketing and social media initiatives.

2016 HIGHLIGHTS

- Launched the new GoHawai'i mobile app with a focus on visitor safety and education, and providing essential destination information designed to encourage visitors to fully enjoy the Hawaiian Islands. The app was also made available in multiple languages.
- Debuted Hawai'i VR, HTA's virtual reality marketing program, at the 2016 Hawai'i Tourism Conference.
- Introduced a facial recognition marketing program in partnership with Expedia. The groundbreaking technology is a first for promoting destination travel and is available to Expedia users in Japan, Oceania, the United States and Canada. It launched at the 2016 Hawai'i Tourism Conference.



2017 FOCUS

HTA will continue to focus on developing digital marketing campaigns supporting the efforts of the Global Marketing Team and drive destination demand for audiences worldwide. The online efforts will raise awareness of Hawai'i with a mission of guiding consumers toward the purchasing stage with conversion handled by industry partners.

- Online channels tailored to each market, such as paid search, will drive demand for audiences searching for information on Hawai'i utilizing locally relevant search engines.
- Locally relevant social media platforms will be updated and developed to create highly targeted connections to audiences intending to travel. Integrated video, where applicable, will increase engagement.

ELEVATE HAWAII'S VALUE PERCEPTION

Ke one lau'ena a Kāne.

The rich, fertile land of Kāne.

Hawaii's true beauty is discovered in its authenticity, timeless cultural legacy, traditions and a way to live life found nowhere else, and a word no other destination can claim or copy: Aloha.

CAREER DEVELOPMENT

The Hawaii Tourism Authority continues to engage Hawaii's youth, offering opportunities for them to explore, interact and enhance their knowledge and skills to pursue a future career in the tourism industry.

2016 HIGHLIGHTS

- The LEI (Leadership, Exploration and Inspiration) Program, now in its fifth year, reached more than 800 students from 29 high schools, in addition to 80 college student mentors, 75 industry and community volunteers, 22 hotels for student site visits, and more than 100 businesses who participated in the program's career fair.
- More than 150 high school students, college students and teachers participated in the inaugural global student debate at the Hawaii Tourism Conference. Eight high school teams took part, including three from Hawaii.
- Teamed up with certified lifeguards in all four Hawaii counties to support the Junior Lifeguard Program, benefiting more than 1,600 Hawaii youths between the ages of 12 and 17. The program's goals are to inspire and prepare Hawaii's next generation of watermen and waterwomen, and help improve water safety statewide.

2017 FOCUS

- Expanding the LEI Program to reach more students, especially on the neighbor islands.
- Growing the Hawaii Tourism Conference global student debate program to include more local and international teams.
- Continuing to work with industry and educational institutions to make training programs available based on industry needs.



BRAND EXPERIENCE

The purpose of HTA's brand experience effort is to create, develop and support programs and projects delivering distinctive experiences that respectfully align with the representation of Hawai'i's people, places and culture.

These programs include:

- Hawaiian cultural initiatives
- Natural resources
- Safety and security
- Brand experiences
 - Signature events
 - Sports events
 - Greetings



SAFETY AND SECURITY

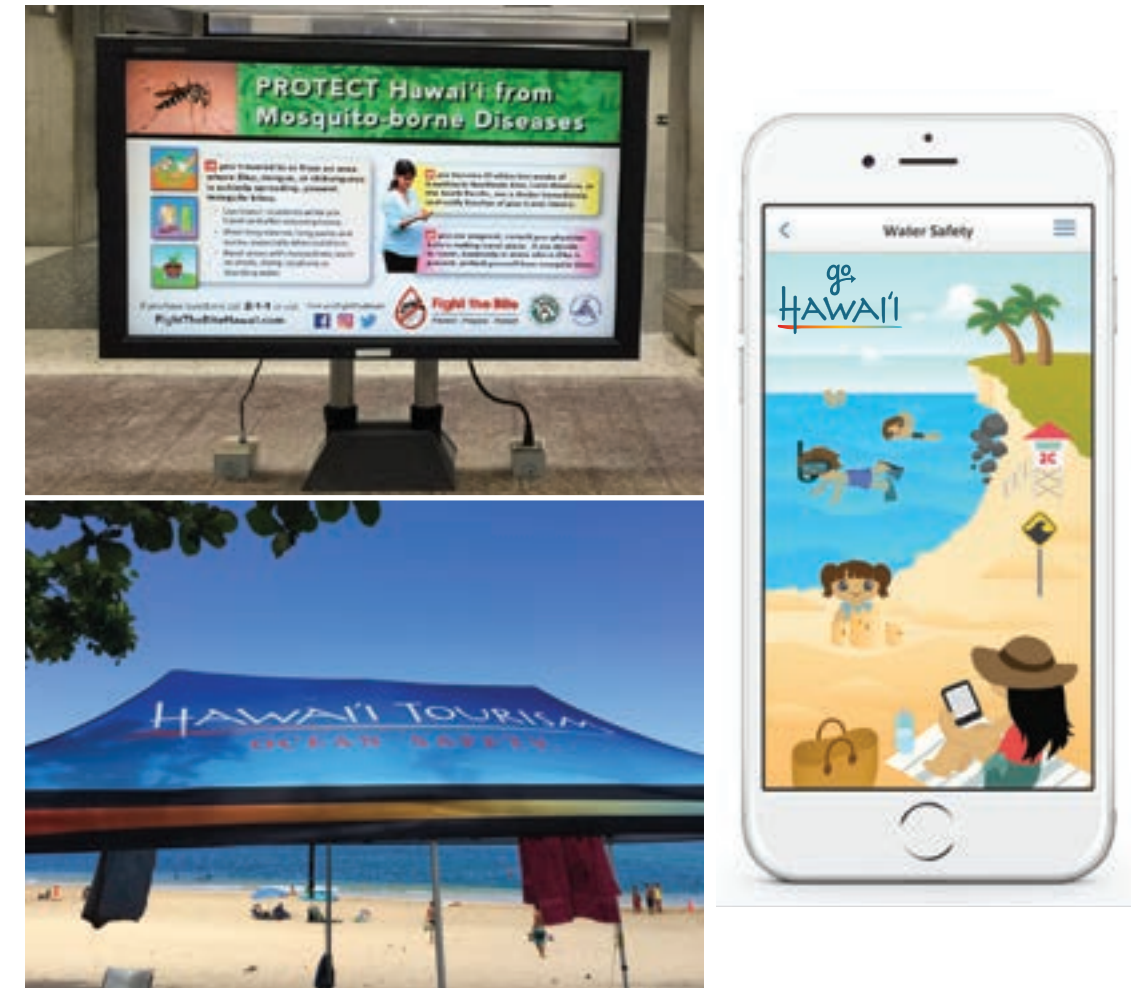
HTA continues to work closely with state and county safety and security agencies to ensure visitor safety remains a top priority. To accomplish this, HTA utilizes technology to reach and deliver safety messages directly to visitors in times of danger or potential danger. Visitor Assistance Programs (VAPs) in all four counties continue to provide assistance with aloha to visitors in need.

2016 HIGHLIGHTS

- Between January and September, VAPs responded to 1,235 cases and assisted 2,839 individuals in need.
- Developed a welcome video with safety messages in English, Chinese, Korean and Japanese, viewable on GoHawaii.com, TravelSmartHawaii.com, HTA's YouTube channel, HTA's GoHawaii'i app, and the websites of many global trade partners.
- Developed the GoHawaii'i mobile app – the State of Hawai'i's first destination app – which offers safety information available in English, Chinese, Korean, Japanese and German to educate visitors on enjoying the Hawaiian Islands safely. Additionally, the app's push notification capability enables HTA to send messages directly to users, alerting them of dangerous or hazardous situations.
- Supported the Hawai'i State Department of Health in its Fight the Bite campaign to eliminate the spread of mosquito-borne diseases in the Hawaiian Islands. Support included placing stand-up banners and electronic messages at airports statewide.

2017 FOCUS

- Continuing to support VAPs providing assistance 24/7 to visitors in need.
- Continuing to be the lead agency proactively communicating to the tourism industry during crises.
- Exploring new channels and touchpoints to deliver safety messages to visitors.



SIGNATURE EVENTS

HTA's signature events include major festivals and events exemplifying the unique attributes that make Hawai'i such a beloved place to live and visit. Events include Native Hawaiian and multicultural gatherings, sports events, and major culinary and arts festivals.

Hawai'i showcases its heritage and community pride, offering activities, festivals and events for residents and visitors that spotlight local cultural experiences. Major festivals are ideal presentations of these experiences, with activities strategically positioned during off-peak travel periods to entice visitor travel during these times of the year.

Sports events also enhance and strengthen Hawai'i's economy, image and quality of life. Recognizing the benefits of these events, HTA developed a sports marketing program designed to enhance Hawai'i's sports presence to global audiences, diversify the visitor experience, highlight the state's natural beauty, and build a sustainable sports tourism market. HTA has created an exciting portfolio of events, with partnerships that include the PGA Tour and LPGA, as well as world championship triathlons, elite collegiate sports, and multiple tennis and marathon events.

These diligently selected festivals and events are enjoyed by residents and stimulate neighbor island travel while drawing a significant number of visitors annually.

In 2016, HTA supported more than 34 signature events. They included:

Hyundai Tournament of Champions	Kaua'i Marathon
Sony Open in Hawai'i	Aloha Invitational
Mitsubishi Electric Championship at Hualālai	Ironman World Championship
NFL Pro Bowl	Hawai'i Food and Wine Festival
POW! WOW! Hawai'i	XTERRA World Championship
Prince Kūhiō Festival	Hawai'i International Film Festival
Merrie Monarch Festival	Kona Coffee Cultural Festival
LOTTE Championship	State Farm Armed Forces Classic
King Kamehameha Celebrations	Maui Jim Maui Invitational
Prince Lot Hula Festival	Hawai'i Open
'Ohana Cup	XTERRA Trail Run World Championship
Kōloa Plantation Days	Honolulu Marathon
Duke's OceanFest	Hawaiian Airlines Diamond Head Classic
Queen Lili'uokalani Long Distance Canoe Race	Hawai'i Bowl
Aloha Festivals	Spike and Serve Volleyball
Hawai'i Island Festival, 30 Days of Aloha	Honolulu Festival
Maui Film Festival	Pan-Pacific Festival



MAJOR FESTIVALS

HTA's major festivals include events that help elevate Hawai'i's cultures, people, places and heritage. The festivals, each with traditions that make them distinctive, offer residents and visitors myriad opportunities to experience the diverse ethnicities that coexist in the Hawaiian Islands.

2016 HIGHLIGHTS

- Held in Honolulu's revitalized Kaka'ako District, POW! WOW! Hawai'i brought together more than 100 local and international artists to paint giant murals in public spaces and present other art-related media. The weeklong annual event, which attracted ample resident and visitor turnout, culminated with a music concert.
- The annual Hawai'i International Film Festival brought top Asian, Pacific Rim, North American and Hawai'i-based filmmakers to O'ahu to share film screenings and insights.
- The sixth annual Hawai'i Food and Wine Festival, held over three weekends on Maui, the island of Hawai'i and O'ahu, featured a roster of more than 100 internationally distinguished master chefs, culinary personalities, and wine and spirit producers.

2017 FOCUS

- Sharing the rich blend of Asian, Pacific and Hawaiian cultures at the Honolulu Festival, which annually strengthens Hawai'i's reputation through educational programs and activities sponsored by the Honolulu Festival Foundation.
- Assisting Mele Mei 2017, a monthlong annual celebration of Hawai'i's music, hula and culture upholding the integrity of Hawai'i as a destination.
- Supporting the Pan-Pacific Festival, which annually features a variety of cultural arts, crafts and stage performances cultivating intercultural understanding and elevating Hawai'i's value perception.



NATIVE HAWAIIAN FESTIVALS

HTA supports numerous Native Hawaiian festivals through its major festivals and product development programs. In support of events highlighting Hawai'i's indigenous culture, HTA continues to be the main sponsor of 14 Native Hawaiian festivals statewide.

2016 HIGHLIGHTS

- Continued as the major sponsor of the Aloha Festivals and King Kamehameha Celebrations.
- Continued as the major sponsor of prominent Hawaiian cultural festivals statewide, including the Prince Kūhiō Celebration and Prince Lot Hula Festival on O'ahu, and Merrie Monarch Festival on the island of Hawai'i.

2017 FOCUS

- Continuing to support festivals perpetuating the Native Hawaiian culture.
- Continuing to assist organizers of Native Hawaiian festivals in building capacity, providing for education on marketing events, planning and execution, and sponsorship development.



SPORTS

With its idyllic year-round tropical weather, Hawai'i continues to be a premier destination for both spectator and participatory sports events. HTA continues to support a variety of sports events – including golf, rugby, tennis, soccer, football and surfing – popular with Hawai'i's major market areas.

2016 HIGHLIGHTS

- The XTERRA World Championship on Maui.
- The Ironman World Championship on the island of Hawai'i, which hosted more than 2,000 participating world-class triathletes.
- The State Farm Armed Forces Classic men's college basketball doubleheader on O'ahu, which featured matchups between the Indiana University Hoosiers and the University of Kansas Jayhawks, the University of Arizona Wildcats and Michigan State University Spartans, and was broadcast on ESPN.
- The first-ever Women's Tennis Association Hawai'i Open, which attracted a field of pro players to O'ahu that included Wimbledon finalist Sabine Lisicki and China's No. 1 female singles player Zhang Shuai.
- The Honolulu Marathon, which drew more than 30,000 participants.

CHANGES IMPLEMENTED

- HTA retained New York-based sports marketing agency Ascendent Sports Group to provide consultation services, evaluate proposals, and pursue new events supporting HTA's sports strategy.

2017 FOCUS

- A marketing partnership with the Los Angeles Clippers featuring in-game promotions and the hosting of a training camp in Hawai'i before the 2017 season highlighted by two pre-season games, likely against the Toronto Raptors.
- Supporting events driving visitor arrivals from all major markets during off-peak seasons.
- Developing and bringing high-visibility sports events to Hawai'i that attract visitors from target markets and engage state residents to attend.
- Positioning the Hawai'i Convention Center as a venue for sports and entertainment events.
- Generating digital assets for use across multiple major market areas.



HARBOR GREETING PROGRAM

HTA partnered with the County of Kaua'i Office of Economic Development, Lahaina Town Action Committee, Destination Hilo, and Destination Kona Coast to implement cruise greeting programs at harbors statewide enhancing each island's visitor arrival experience.

2016 HIGHLIGHTS

- Continued activities related to greeting cruise ship visitors in Lihue, Lahaina, Hilo and Kona.

2017 FOCUS

- Further developing the Harbor Greetings Program to include a Hawai'i sense of place and ensure a positive, enduring first and last impression of the Hawaiian Islands for visitors.



ACCESS (AIR AND CRUISE)

Maintaining dependable access to the Hawaiian Islands by air and cruise ship is essential for the success and sustainability of our visitor industry. HTA is focused on working with air carriers serving the Hawaiian Islands to maintain and expand the routes sustaining our tourism industry. In 2016, robust air service led to a fifth consecutive year of record visitor arrivals

2016 HIGHLIGHTS

- Hosted more than 20 aviation executives from around the world at HTA's second annual Airline Summit.
- Supported the launch of Virgin America air service from Los Angeles to Maui and O'ahu.
- Met with more than 40 airline executives to discuss opportunities for improving Hawai'i air access.

2017 FOCUS

- Continuing to develop access from key international markets in Asia and Europe.
- Continuing to diversify airlift with the addition of new long haul, low-cost airlines to the portfolio of carriers serving Hawai'i.
- Working with existing airline partners to expand marketing relationships utilizing programs that drive Hawai'i awareness and visitation.

Cruise ships offer travelers a unique way to see the Hawaiian Islands, appreciate Hawai'i's natural beauty, and take in a diversity of experiences found nowhere else in the world.

2016 HIGHLIGHTS

- Improved cruise scheduling via hawaii.portcall.com.
- Collaborated with Access Cruise Inc., HTA's cruise consultant, to maintain and develop new cruise business.
- Hosted the inaugural Cruise Executive Summit, attended by executives from Princess Cruises, Royal Caribbean International, Holland America Line and Seabourn Cruise Line.

2017 FOCUS

- Hosting the 2017 Cruise Executive Summit and seeking opportunities to expand its programming and diversify attendance.



BRAND DEVELOPMENT PROJECTS

Brand development initiatives support Hawai'i's tourism industry through programs and promotions designed to help travel consumers better understand the diverse appeal of the Hawaiian Islands. A majority of the initiatives have a connection to the travel trade and hospitality communities, and provide support and resources for the Global Marketing Team.

2016 HIGHLIGHTS

- Represented Hawai'i at the U.S. Travel Association's 2016 IPW marketplace in New Orleans with representatives from Hawai'i Tourism Europe, Hawai'i Tourism Oceania, the Island Chapter Bureaus, and Anthology Marketing Group. HTA conducted meetings with more than 150 global tour operators and media, and hosted a special evening event for international tour operators and airlines to thank them for their support.
- Enjoyed continued success with the Mahalo Month for Travel Professionals program, which gathered more than 120 offers from Hawai'i's tourism industry to engage agents in promoting the Hawaiian Islands.
- Held meetings with key industry stakeholders in April to develop greater dialogue and support between HTA's Global Marketing Team and industry stakeholders on O'ahu, Maui and the island of Hawai'i.
- Developed an edu-tourism video and informational booklet featuring Hawai'i programs for international students to further grow this niche market.
- Designed a new logo and created ads for post-arrival marketing promotions.

2017 FOCUS

- Executing a new post-arrival marketing campaign for HTA-sponsored events and programs.
- Continuing Hawai'i representation at the U.S. Travel Association's 2017 IPW marketplace set for Washington, D.C. in June, and coordinating industry stakeholder meetings in March.



TOURISM RESEARCH AND PLANNING

Sound business decisions based on visitor data and research are important for effective brand development. Hawai'i's tourism industry is in a very mature phase requiring constant research and data to increase brand awareness, improve and enhance product experiences, maintain advantages against competitive destinations, and strategically expand to new markets. HTA's Tourism Research department sustains efforts to ensure this research is available to educate and empower stakeholders to make data-driven decisions.

2016 HIGHLIGHTS

- Consistently published the Monthly Visitor Statistics Report, Airline Seat Outlook Report, 2015 Annual Visitor Research Report, 2015 Annual Visitor Plant Inventory, and 2015 Annual Visitor Satisfaction and Activities Report.
- Issued the findings of the 2015 Resident Sentiment Study.
- Completed the first LGBT visitor study for Hawai'i.
- Completed a holistic impact study on HTA's signature festivals and events.
- Completed studies on Tourism Impact on Hawai'i Housing and Shared Accommodations Impacts.
- Developed a Market Allocation Platform model to rank origin markets across comparable metrics of opportunity, cost and risk to assist in budget allocation decisions.

CHANGES IMPLEMENTED

- Developed a program evaluation process for HTA that includes program logic models aligning to the strategic plan and new measures of outputs and outcomes.
- Increased data collection, analysis and reporting to accommodate Hong Kong and Southeast Asia, HTA's newest market areas.

2017 FOCUS

- Completing a leadership and business opinion study to monitor issues in Hawai'i's tourism industry and the perception of HTA as a tourism industry leader.
- Completing additional LGBT visitor studies for the Asia and Oceania markets.
- Creating dashboards and other tools for better data visualization.

PROGRAMS

- Calculation of Visitor Characteristics and Expenditures
- Estimation of Visitor Arrivals by Country by Month
- Data Dissemination
- Infrastructure Research
- Evaluation and Performance Measures
- Marketing Research and Other Research
- Tourism Strategic Plan and Brand Management Plan

PUBLICATION	SECTION OF WEBSITE	RELEASE DATE(S)
<i>Monthly Visitor Statistics and News Release</i>	Visitor Highlights	By the last day of the following month
<i>Island Highlights</i>	Visitor Highlights	By the last day of the following month
<i>Major Market Area Highlights and Fact Sheets</i>	Major Market Areas	By the last day of the following month
<i>Daily Air Passenger Counts</i>	Visitor Highlights	By 3 p.m. each workday
<i>Monthly Air Seat Outlook</i>	Infrastructure	By the first week of each month
<i>Annual Visitor Research Report</i>	Annual Visitor Research	Annually, in August
<i>Annual Visitor Plant Inventory</i>	Visitor Plant Inventory	Annually, in December
<i>Quarterly Visitor Satisfaction Monitoring Report</i>	Visitor Satisfaction and Activity	Three months after the end of the quarter
<i>Annual Visitor Satisfaction and Activities Report</i>	Visitor Satisfaction and Activity	Annually, in September
<i>Quarterly Timeshare</i>	Infrastructure Research	One month after the end of the quarter
<i>Marketing Effectiveness Study</i>	Marketing Research	Spring and fall
<i>Survey of Resident Sentiment</i>	Evaluation and Performance Measures	December
<i>Tourism Forecast</i>	DBEDT	Feb. 25, May 15, Aug. 25, Nov. 15



O'AHU

Home to world-famous Waikīkī Beach and Hawai'i's largest collection of lodging accommodations, O'ahu continued to draw the largest total visitor arrivals and spending of all the Hawaiian Islands in 2016. Although visitor arrivals consistently stayed ahead of pace throughout the year, spending on the island lagged slightly behind.

Air seats to O'ahu expanded with the launch of nonstop service from Seoul, South Korea, by Jin Air in December 2015, and the introduction of nonstop service from San Francisco in November 2015 and Los Angeles in June 2016 by Virgin America.

HTA supported a range of nonprofit programs on O'ahu perpetuating culture, preserving the environment, and

presenting community festivals and events. HTA provided funding to 15 Kūkulu Ola: Living Hawaiian Culture programs, seven Natural Resources Community programs, 27 County Product Enrichment programs, and 18 Signature Events.

VISITOR STATISTICS

O'AHU	2015 FINAL	2016 FORECAST	% Change*	2016 YTD**	% CHANGE
Expenditures (\$ mil.)	7,366.5	7,208.5	-2.1%	5,384.0	-2.1%
Arrivals	5,339,912	5,453,970	2.1%	4,101,118	2.1%
PPPD Spending (\$)	202.3	193.7	-4.2%	192.1	-4.2%
Air Seats ***	8,135,126	8,065,993	-0.8%	6,100,233	-0.4%

Source: Hawai'i Tourism Authority

* Year-over-year growth

** January-September 2016

*** Source: Scheduled seats from Diio schedule

TRANSIENT ACCOMMODATIONS TAX (TAT) TO CITY & COUNTY OF HONOLULU

O'AHU	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	PROJECTED FY 2017
TAT (\$ mil.)	41.01	41.0	41.0	45.4	45.4	45.4

Note: City & County of Honolulu receives 44.1% of the TAT revenues distributed to the counties.

SELECTED PROGRAMS AND FUNDING

O'AHU	2015		2016		STATEWIDE	
	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT
County Product Enrichment Program	27	\$325,000	27	\$310,000	-	-
Kūkulu Ola: Hawaiian Culture Community Program	14	\$460,525	15	\$529,252	6	\$256,268
Major Festivals	4	\$701,000	4	\$468,000	1	\$300,000
Native Hawaiian Festivals	4	\$450,000	2	\$150,000	3	\$600,000
Natural Resources Community Program	13	\$385,266	7	\$167,000	-	-
Safety and Security	1	\$272,000	1	\$288,000	4	\$150,000
Sports Events	7	\$1,435,000	13*	\$7,010,000	1*	\$132,000
Other Brand Experience Programs***	-	-	4	\$666,000	2	\$810,000
Career Development	-	-	-	-	3	\$325,000
Visitor Bureau Funding and Other Direct Investments	-	\$3,279,269	-	\$3,503,167	-	-
TOTAL HTA PROGRAM FUNDING		\$7,308,060		\$13,091,419		\$2,573,268

* Doesn't include Honolulu Marathon

** O'ahu and Maui only

*** Beginning with the 2016 Annual Report, "Other Brand Experience Programs" are included



MAUI COUNTY

Maui County had the state's strongest combined increase in visitor arrivals and spending in 2016. Tourism on Lāna'i rebounded with the re-opening of the renovated Four Seasons Resort Lāna'i in early 2016. Visitor arrivals and spending for Moloka'i lagged behind the pace of 2015.

HTA supported a variety of nonprofit programs benefiting culture, the environment and communities in Maui County. HTA provided funding to seven Kūkulu Ola: Living Hawaiian Culture programs, 12 Natural Resources Community programs, 22 County Product Enrichment programs, and five Signature Events.

VISITOR STATISTICS

MAUI	2015 FINAL	2016 FORECAST	% Change*	2016 YTD**	% CHANGE
Expenditures (\$ mil.)	4,108.9	4,491.3	9.3%	3,362.2	9.3%
Arrivals	2,540,162	2,634,147	3.7%	1,992,700	3.7%
PPPD Spending (\$)	197.6	209.2	5.9%	209.5	5.9%
Air Seats ***	2,271,354	2,336,495	2.9%	1,768,347	3.0%

MOLOKA'I	2015 FINAL	2016 FORECAST	% Change*	2016 YTD**	% CHANGE
Expenditures (\$ mil.)	33.7	30.2	-10.5%	22.6	-10.5%
Arrivals	64,767	58,299	-10.0%	46,130	-10.0%
PPPD Spending (\$)	118.0	104.9	-11.1%	106.5	-11.1%

LĀNA'I	2015 FINAL	2016 FORECAST	% Change*	2016 YTD**	% CHANGE
Expenditures (\$ mil.)	42.9	82.3	91.7%	61.6	91.7%
Arrivals	58,390	58,917	0.9%	47,503	0.9%
PPPD Spending (\$)	263.3	400.4	52.0%	388.8	52.0%

Source: Hawai'i Tourism Authority

* Year-over-year growth

** January-September 2016

*** Source: Scheduled seats from Diio schedule

TRANSIENT ACCOMMODATIONS TAX (TAT) TO MAUI COUNTY

MAUI COUNTY	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	PROJECTED FY 2017
TAT (\$ mil.)	21.2	21.2	21.2	23.4	23.4	23.4

Note: Maui County receives 18.6% of the TAT revenues distributed to the counties.

SELECTED PROGRAMS AND FUNDING

MAUI COUNTY	2015		2016		STATEWIDE	
	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT
County Product Enrichment Program	23	\$322,000	22	\$324,000	-	-
Kūkulu Ola: Hawaiian Culture Community Program	6	\$155,543	7	\$189,480	6	\$256,268
Major Festivals	1	\$105,000	1	\$105,000	1	\$300,000
Native Hawaiian Festivals	2	\$60,000	-	-	3	\$600,000
Natural Resources Community Program	11	\$368,873	12	\$323,500	-	-
Safety and Security	1	\$46,000	1	\$46,000	4	\$150,000
Sports Events	3	\$565,000	4	\$625,000	1*	\$132,000
Other Brand Experience Programs**	-	-	2	\$40,000	2	\$810,000
Career Development	-	-	-	-	3	\$325,000
Visitor Bureau Funding and Other Direct Investments	-	\$2,877,071	-	\$3,088,379	-	-
Moloka'i Visitors Association	-	\$244,741	-	\$278,177	-	-
Destination Lāna'i	-	\$143,000	-	\$163,544	-	-
TOTAL HTA PROGRAM FUNDING		\$4,887,228		\$5,183,080		\$2,573,268

* O'ahu and Maui only

** Beginning with the 2016 Annual Report, "Other Brand Experience Programs" are included



KAUA'I

Visitor spending on Kaua'i continued to show strong year-over-year growth in 2016 – following excellent results in 2015 – even as visitor arrivals to the island remained flat overall. The lush, natural beauty of the Garden Island continues to be one of its major selling points.

In support of Kaua'i's cultural, environmental and community initiatives, HTA provided funding support to two Kūkulu Ola: Living Hawaiian Culture programs, five Natural Resources Community programs, 25 County Product Enrichment programs, and two Signature Events.



ISLAND OF HAWAI'I

The island of Hawai'i experienced consistent growth in visitor spending throughout 2016, and a modest increase in visitor arrivals. Eruptive activity at the island's Kīlauea volcano continues to generate public and media attention, and attract visitors from around the world.

HTA supported the island of Hawai'i's efforts to celebrate culture, environment and community festivals by funding key programs. HTA provided financial support to five Kūkulu Ola: Living Hawaiian Culture programs, eight Natural Resources Community programs, 17 County Product Enrichment programs, and eight Signature Events.

VISITOR STATISTICS

KAUA'I	2015 FINAL	2016 FORECAST	% Change*	2016 YTD**	% CHANGE
Expenditures (\$ mil.)	1,548.0	1,667.4	7.7%	1,247.3	7.7%
Arrivals	1,173,752	1,176,120	0.2%	897,087	0.2%
PPPD Spending (\$)	172.9	184.3	6.6%	181.8	6.6%
Air Seats ***	676,227	701,915	3.8%	541,243	4.5%

Source: Hawai'i Tourism Authority

* Year-over-year growth

** January-September 2016

*** Source: Scheduled seats from Diio schedule

TRANSIENT ACCOMMODATIONS TAX (TAT) TO KAUA'I COUNTY

KAUA'I	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	PROJECTED FY 2017
TAT (\$ mil.)	13.48	13.48	13.5	14.9	14.9	14.9

Note: Kaua'i receives 14.5% of the TAT revenues distributed to the counties.

SELECTED PROGRAMS AND FUNDING

KAUA'I	2015		2016		STATEWIDE	
	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT
County Product Enrichment Program	24	\$335,500	25	\$350,000	-	-
Kūkulu Ola: Hawaiian Culture Community Program	4	\$141,322	2	\$40,000	6	\$256,268
Major Festivals	1	\$63,500	1	\$63,000	1	\$300,000
Native Hawaiian Festivals	2	\$30,000	-	-	3	\$600,000
Natural Resources Community Program	3	\$80,000	5	\$105,000	-	-
Safety and Security	1	\$53,000	1	\$53,000	4	\$150,000
Sports Events	1	\$30,000	1	\$25,000	1*	\$132,000
Other Brand Experience Programs**	-	-	1	\$20,000	2	\$810,000
Career Development	-	-	-	-	3	\$325,000
Visitor Bureau Funding and Other Direct Investments		\$2,280,893		\$2,643,047		-
TOTAL HTA PROGRAM FUNDING		\$3,014,215		\$3,299,047		\$2,573,268

* O'ahu and Maui only

** Beginning with the 2016 Annual Report, "Other Brand Experience Programs" are included

VISITOR STATISTICS

ISLAND OF HAWAI'I	2015 FINAL	2016 FORECAST	% Change*	2016 YTD**	% CHANGE
Expenditures (\$ mil.)	1,838.5	2,007.6	9.2%	1,502.1	9.2%
Arrivals	1,514,973	1,534,799	1.3%	1,161,905	1.3%
PPPD Spending (\$)	160.4	173.7	8.3%	174.3	8.3%
Air Seats ***	855,019	897,342	4.9%	683,235	5.1%

Source: Hawai'i Tourism Authority

* Year-over-year growth

** January-September 2016

*** Source: Scheduled seats from Diio schedule

TRANSIENT ACCOMMODATIONS TAX (TAT) TO ISLAND OF HAWAI'I

ISLAND OF HAWAI'I	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	PROJECTED FY 2017
TAT (\$ mil.)	17.3	17.3	17.3	19.2	19.2	19.2

Note: Hawai'i County receives 18.6% of the TAT revenues distributed to the counties.

SELECTED PROGRAMS AND FUNDING

ISLAND OF HAWAI'I	2015		2016		STATEWIDE	
	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT
County Product Enrichment Program	15	\$322,000	17	\$310,000	-	-
Kūkulu Ola: Hawaiian Culture Community Program	9	\$214,200	5	\$125,000	6	\$256,268
Major Festivals	1	\$63,500	1	\$63,500	1	\$300,000
Native Hawaiian Festivals	4	\$107,500	1	\$50,000	3	\$600,000
Natural Resources Community Program	5	\$166,000	8	\$238,500	-	-
Safety and Security	1	\$120,500	1	\$138,000	4	\$150,000
Sports Events	3	\$480,000	3	\$600,000	1*	\$132,000
Other Brand Experience Programs**	-	-	2	\$50,000	2	\$810,000
Career Development	-	-	-	-	3	\$325,000
Visitor Bureau Funding and Other Direct Investments		\$2,231,356		\$2,625,488		-
TOTAL HTA PROGRAM FUNDING		\$3,705,056		\$4,200,488		\$2,573,268

* O'ahu and Maui only

** Beginning with the 2016 Annual Report, "Other Brand Experience Programs" are included

STRENGTHEN HTA'S REPUTATION

He inoa 'ala.

A fragrant name.

Integrity. Credibility. Honor.

All are qualities HTA adheres to in conducting its business and leading Hawai'i tourism forward.



HAWAI'I TOURISM CONFERENCE

September 26-30, 2016

Inspired by the theme *Transforming Tourism Together*, HTA expanded the Hawai'i Tourism Conference to a full week and concentrated its focus on providing attendees with industry insight while allowing them to voice their opinions on Hawai'i's tourism future. The change in format proved to be successful.



The 2016 Hawai'i Tourism Conference drew 2,100 attendees – a 70 percent increase over 2015 – with 18 countries represented. There were 79 sessions and special events – the most ever for the conference – including 10 sessions devoted to Hawaiian culture. Another first was the inclusion of exhibit booths at The Village Square, which featured 59 exhibitors.

2016 HIGHLIGHTS

- Redesigned the conference format to facilitate dynamic global sessions encouraging engagement and thought-provoking dialogue between panelists and the audience.
- Created more opportunities for collaboration and networking with fellow attendees through:
 - The Village Square, an exhibition area for attendees to interact with the Island Chapter Bureaus and industry partners, attend sessions, engage in networking breaks, and experience new technology.
 - Morning and evening events and activities.
 - Pre-conference tours to the neighbor islands.
- Hosted the inaugural Executive Summit, bringing together a select group of local and international CEOs and leaders of major corporations for two days of engagement on the island of Hawai'i and O'ahu. The summit offered participants an opportunity to hear from and interact with innovative industry leaders.
- Hosted the conference's second annual Airline Summit for route planners to educate them on trends and opportunities in the Hawai'i market. In addition to designing a special conference session track for planners, HTA offered the group an opportunity to visit Kaua'i on a familiarization trip.
- HTA's annual Tourism Legacy Awards recognized surfing, one of Hawai'i's gifts to the world, with a special tribute honoring Hawai'i surfing legends Richard "Buffalo" Keaulana and George Downing, and their 'ohana.

2017 FOCUS

- Making the 2017 Hawai'i Tourism Conference, set for September 19-21, an even greater success.



HAWAI'I TOURISM CONFERENCE



PROGRAM/PROJECT CONTRACT LISTING

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

The Happy Traveller LLC (dba BrandStory Inc, PTE Ltd.) – CON 16039: External marketing services for the China global marketing team.

Travelscape LLC (dba Expedia Media Solutions) – CON 16065: Watch with Aloha facial recognition application; Local Drones footage and social media integration.

Hawai'i Visitors and Convention Bureau – CON 16071: Supplemental services related to management of research, websites, online marketing and social media, intellectual property data bank, development services, and projects related to the 2016 Hawai'i Tourism Conference.

PROCUREMENT OVER \$100,000 FOR CALENDAR YEAR 2016

Aviareps Sdn Bhd – CON 16037: Services related to Southeast Asia guest services agency.

Stray Moon LLC – CON 16038: Mele Mei marketing support.

Clearpath Entertainment LLC – CON 16041: Services related to event planning for the 2016 Hawai'i Tourism Conference.

Anthology Marketing Group – CON 2015-2017: Visitors Satisfaction and Activity Survey.

Young & Rubicam, Inc. (dba LOTTE Championship) – CON 16043: Services related to the LPGA golf tournament at Ko Olina Resort.

Hawai'i State Department of Transportation – MOA 16045: Services related to the Nā Kahua Mokulele Program 2016.

Native Hawaiian Hospitality Association – CON 16048: Services related to cultural education, information, outreach and support.

Grand Pacific Events LLC – CON 16049: Services related to the 2016 'Ohana Cup Rugby League Festival.

Hawai'i Visitors and Convention Bureau – CON 16054: Services related to Island-based international marketing.

Miles Media Group LLP – CON 16057: GoHawai'i website design.

Anthology Marketing Group – Con 16062: MCI public relations services for Meet Hawai'i.

North Shore Lifeguard Association (NSLA) – CON 16066: Services related to instruction in water safety, surf rescue, first aid, CPR, ocean safety, environmental awareness, weather patterns, swell forecasting, tidal currents, surf trends and wave energy.

Aviareps Malaysia – CON 16068: Services related to Southeast Asia.

Virgin America – CON 16073: Services related to the promotion of two new air routes (LAX-HNL and LAX-OGG).

Repucom America LLC – CON 16074: Evaluation of 2016 HTA festivals and events.

First Daughter Mediaworks, Inc. – CON 16077: We Share Campaign, a digital public information campaign.

Milici Valenti Ng Pack, Inc. – CON 16079: Services related to Brand Hawai'i guidelines, videos and HTA profile-related matter.

Pacific Historic Parks – CON 16080: Services related to the Pearl Harbor 75th Commemoration.

Hawai'i Junior Surfing – CON 16082: Services related to multiple surfing events throughout the Islands.

County of Kaua'i – MOA 16083: Services related to the restoration of north Kaua'i tourist spots, including Hā'ena State Park and Ke Ahu a Laka.

Ascendent Sports Group LLC – CON 17003: Services related to sports marketing and sporting events.

Pro Tennis Group LLC – CON 17008: Services related to Hawai'i Open Tennis.

THE HTA TEAM SUPPORTING HAWAII'S TOURISM INDUSTRY



George D. Szigeti, *President and Chief Executive Officer*

Randy Baldemor, *Chief Operating Officer*

Marc Togashi, *VP, Finance*

Leslie Dance, *VP, Marketing and Product Development*

Caroline Anderson, *Tourism Brand Manager*

Maile Carvalho, *Finance Administrative Assistant*

Charlene Chan, *Director of Communications*

Jennifer Chun, *Tourism Research Manager*

Minh-Chau Chun, *Tourism Research Manager*

Jadie Goo, *Director of Marketing*

Laci Goshi, *Tourism Brand Manager*

Carole Hagihara, *Executive Assistant*

Denise Kahalekulu, *Administrative Assistant*

Kalani Ka'anā'anā, *Director of Hawaiian Cultural Affairs*

Lawrence Liu, *Tourism Research Statistician*

Chika Miyauchi, *Tourism Brand Manager*

Daniel Nāho'opi'i, *Director of Tourism Research*

Ronald Rodriguez, *Contracts Specialist*

Chris Sadayasu, *Tourism Brand Manager*

Michele Shiwaki, *Administrative Assistant*

Noriko Sloan, *Operations Manager*

Iris Takamoto, *Budget & Fiscal Officer*

Vengie Talaro, *Administrative Assistant*

HAWAII TOURISM AUTHORITY (HTA)

Fiscal Year (FY) 2016 Actuals (\$000)

REVENUES	
TAT Deposits - Tourism Special Fund	\$ 82,000
Investment Pool Interest/Miscellaneous Receipts	224
TOTAL REVENUES	\$ 82,224
APPROPRIATIONS	
FY 2016	\$ 87,252
TOTAL APPROPRIATIONS	\$ 87,252
HTA EXPENDITURES*	
Maintaining Brand	\$ 4,732
Brand Experience	13,662
Brand Management	58,597
Communications	922
Tourism Research	2,113
Strategic Oversight and Governance	3,587
TOTAL HTA EXPENDITURES	\$83,613

* Hawaiian culture is intertwined throughout all facets of HTA's marketing programs.

HAWAII CONVENTION CENTER (HCC)

Fiscal Year (FY) 2016 Actuals (\$000)

REVENUES	
TAT Deposits - Convention Center Enterprise Special Fund	\$ 26,500
Convention Center Operations	12,123
Transfer from Tourism Special Fund for Convention Center	
Sales and Marketing	3,950
Investment Pool Interest/Miscellaneous Receipts	67
TOTAL REVENUES	\$ 42,640
APPROPRIATIONS	
FY 2016	\$ 54,023
TOTAL APPROPRIATIONS	\$ 54,023
HCC EXPENDITURES	
Convention Center Operations	\$ 9,738
Convention Center Sales and Marketing	3,133
Convention Center Repair and Maintenance	4,200
Strategic Oversight and Governance (Includes Convention Center Insurance)	599
Total Expenditures Prior to Payments on Obligation to State Department of Budget and Finance	\$ 17,670
Payments on Obligation to State Department of Budget and Finance	\$ 20,000
TOTAL HCC EXPENDITURES	\$ 37,670

HAWAII TOURISM

AUTHORITY

Hawai'i Convention Center
1801 Kalākaua Avenue
Honolulu, Hawai'i 96815

kelepona tel: (808) 973-2255
kahua pa'a web: hawaiiauthority.org

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