



Ke'ena Kuleana Ho'okipa O Hawai'i
1801 Kalākaua Avenue
Honolulu, HI 96815
kelepona tel (808) 973-2255
kelepa fax (808) 973-2253
hawaii tourism authority.org

DEPT. COMM. NO. 2023-003

December 27, 2023

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

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

Aloha President Kouchi, Speaker Saiki, and Members of the Legislature:

For your information and consideration, I am transmitting a copy of the Hawai'i Tourism Authority's (HTA) 2023 Annual Report, as required by Section 201B-16, Hawai'i Revised Statutes. In accordance with Section 93-16, Hawai'i Revised Statutes, the HTA's annual report may be viewed electronically at:

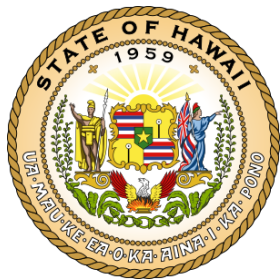
<http://dbedt.hawaii.gov/overview/annual-reports-reports-to-the-legislature/>.

With aloha,

Daniel Nāho'opi'i
Interim HTA President & CEO

Enclosure

c: Legislative Reference Bureau



2023 Annual Report

to the

**Hawai'i State
Legislature**

Regular Session of 2024

Prepared by
Hawai'i Tourism Authority
Department of Business, Economic
Development & Tourism
State of Hawai'i
December 2023

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

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Message from the Interim President & CEO

Aloha kākou,

We share this annual report for 2023 with you, our partners in the Hawai'i State Legislature. Our team values your support, appreciates your input, and welcomes your views on how the Hawai'i Tourism Authority can better serve the people of Hawai'i as we holistically manage tourism in a sustainable manner consistent with economic goals, cultural values, preservation of natural resources, community desires and visitor industry needs.

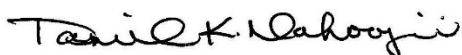
This year was unprecedented with the tragic Maui wildfires in August resulting in the devastating loss of loved ones, homes, cultural and historical sites, and businesses in Lahaina. Our team provided immediate emergency response, working among fellow government agencies and visitor industry partners to address the community's needs. However, the loss of Lahaina, Maui's greatest tourism asset and the apprehension to travel by travelers led to a severe drop in visitor arrivals. HTA continued to support Maui in its recovery in the months to follow with multi-faceted efforts in our key source markets to inform visitors on ways they can mālama Maui - to come to Maui and support the people of Maui by visiting and helping the small businesses across the island recover and survive. We know there is much work to be done on this long path to recovery and are committed to working among the community with the people and businesses of Maui guiding the way.

It was also a year of transition at HTA with interim leadership in the executive office and new board chairs, as well as a new mechanism of funding our work. What remains consistent is our commitment to manage tourism in a way that addresses current tourism impacts, while continuing to deliver the economic benefits that thousands of kama'āina families and local businesses rely on. Our goal is towards tourism that makes Hawai'i better for visitors, residents, communities and businesses (regenerative tourism).

We will continue to work with the Legislature and other state agencies to support initiatives that are in alignment with our overall mission. We believe that by working collaboratively and cooperatively, we will be able to improve the wellbeing of our communities throughout the state and the overall experience for travelers will follow.

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

Mālama pono.



Daniel Nāho'opi'i
Interim President & Chief Executive Officer

Board of Directors (as of December 2023)

Mufi Hannemann, Chair

President & CEO, Hawai'i Lodging & Tourism Association
At-Large

Faylene Mahina Paishon, 1st Vice Chair

CEO & Co-Founder, Waiwai Collective
At-Large

Kimberly Agas

General Manager, Disney Resort & Spa
At-Large

David Arakawa

Executive Director, Land Use Research Foundation of Hawai'i
At-Large

Dylan Ching

Vice President of Operations, TS Restaurants
At-Large

Stephanie Iona

Civil Engagement Consultant
At-Large | County of Kaua'i

James McCully

Owner, McCully Works
At-Large | County of Hawai'i

Sherry Menor-McNamara

President & CEO, Chamber of Commerce Hawai'i
At-Large

Blaine Miyasato

Managing Director-State Governmental, Hawaiian Airlines
At-Large | City & County of Honolulu

James Tokioka

Director, Department of Business, Economic Development & Tourism
Ex-Officio

Mike White

General Manager (Retired), Ka'anapali Beach Hotel & The Plantation Inn
At-Large | County of Maui

Sig Zane

CEO, Sig Zane Designs
At-Large

Staff (as of December 2023)

LEADERSHIP

Daniel Nāho'opi'i, Interim President & CEO, Chief Administrative Officer

Caroline Anderson, Director of Planning

Isaac W. Choy, VP of Finance

T. Ilihia Gionson, Public Affairs Officer

Kalani Ka'anā'anā, Chief Brand Officer

Maile Carvalho, Account Specialist

Maka Casson-Fisher, Brand Manager

Kristen Colburn, Procurement Specialist

Tracey Fermahin, Procurement Manager

Jadie Goo, Senior Brand Manager

Carole Hagihara-Loo, Executive Assistant & Board Liaison

Dede Howa, Brand Manager

'Iwalani Kūali'i Kaho'ohanohano, Senior Brand Manager

Kahealanikapono Kashinoki, Administrative Assistant, Brand

Talon Kishi, Budget and Fiscal Officer

Sunnie Lasconia, Contracts & Administrative Manager

Trishia Mendoza, Administrative Assistant, Brand

Michele Shiowaki, Administrative Assistant, Planning

Ross Willkom, Brand Manager

Overview of the Hawai'i Tourism Authority

The HTA was established in 1998 through a legislative act to serve as the state's lead agency strategically managing tourism, Hawai'i's largest industry. HTA is administratively attached to the State Department of Business, Economic Development & Tourism (DBEDT). The 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.

Among its responsibilities, HTA is charged with:

- Setting tourism policy and direction from a statewide perspective.
- Development and implementing the state's tourism marketing plan and efforts.
- Supporting programs and initiatives perpetuating the Hawaiian culture, Hawai'i's natural resources, community-based projects and initiatives that enhance the Hawaiian Islands brand.
- Coordinating the development of new tourism products in the private and public sector, including sports, culture, health and wellness, education, technology, agriculture, and nature tourism.
- Achieving the goals in its 2025 Strategic Plan.
- Managing programs and activities to sustain a healthy visitor industry.
- Coordinating planning, promotional and outreach activities with the public and private sectors regarding the tourism industry.
- Fostering greater collaboration among state and government agencies and the community with the visitor industry.

In recent years, Hawai'i has had a growing need to balance and meet the needs of the destination and its communities, particularly between public and private sectors. Therefore, the Hawai'i Tourism Authority made an intentional advancement to operate as a destination management organization (DMO). The HTA acknowledges that while our goal is to drive economic impacts by promoting travel to the state, we also strive to improve communities and the visitor experience in safe, responsible, and sustainable ways. The board voted on July 27, 2023 to reorganize the HTA. The adjusted organization will create a higher profile for destination stewardship, addresses the State Auditor's report requiring increased monitoring and evaluation of contracts and contractors, meets the different tourism needs of each island, and sets the foundation to bring back in-house contracted services to better manage outcomes.

Our Mission

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

Hawai'i Tourism Authority's 2025 Strategic Plan: Summary and Progress

(HRS §201B-7(a)(9)(b)(1))

Adopted by the HTA Board in January 2020, the HTA's 2025 Strategic Plan serves as the guiding document for decision-making and the overall direction for the Authority. As part of the development of the strategic plan, HTA traveled throughout the state to engage the community and visitor industry to inform the new plan. The plan recognized that Hawai'i tourism is at a point that requires rebalancing of priorities as the increase in visitor arrivals (pre-pandemic) impacted Hawai'i's natural resources and communities. As such, the 2025 Strategic Plan identifies destination management as "the heart" of the update.



HTA's Strategic Plan is organized around four pillars: Natural Resources, Hawaiian Culture, Community, and Brand Management and Marketing (abbreviated to Brand Marketing). There is strong overlap and exchange between all these pillars and together with planning and evaluation and administrative services support, they reinforce HTA's overall operations.

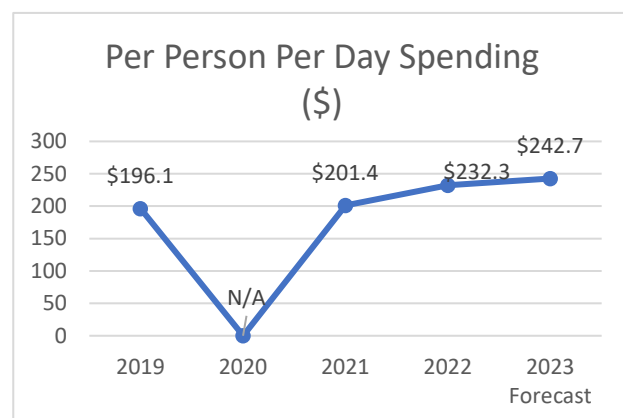
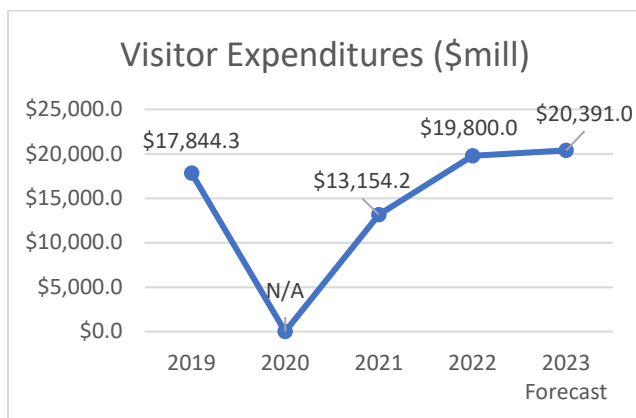
Execution of HTA's program and activities are designed to meet each pillar's goals, and monitored against the benchmarks and measures set in the Strategic Plan and Annual Tourism Management & Marketing Plan.

2025 Strategic Plan's Key Performance Indicators

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

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

Total visitor expenditures (+11.0%) and per person per day spending (+23.8%) continued to grow post-pandemic. The 2023 visitor expenditures and per person per day spending is expected to increase +4.3% and +4.5% respectively over the previous year.

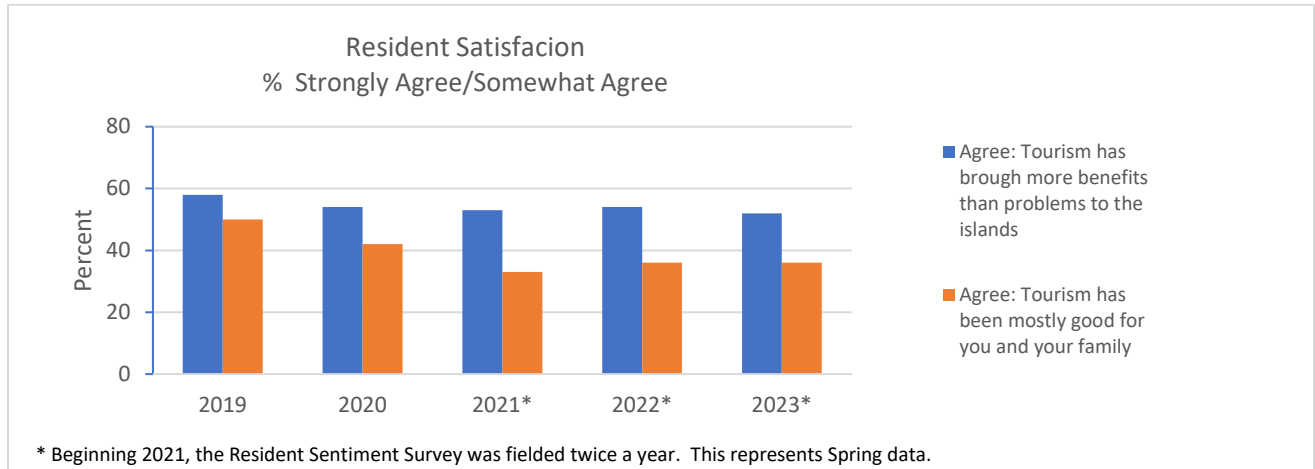


¹ N/A = Due to COVID-19 restrictions, fielding for visitor spending was limited for 2020. Annual 2020 visitor spending statistics were not available.

2023 Forecast: DBEDT 4th Quarter 2023 forecast dated December 7, 2023.

Quality of Life Indicator – Resident Satisfaction

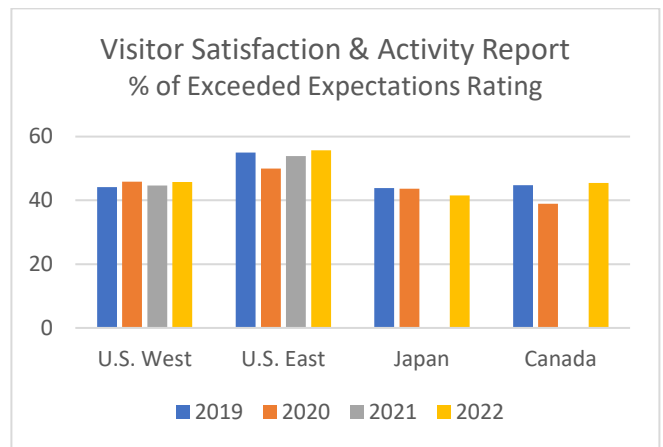
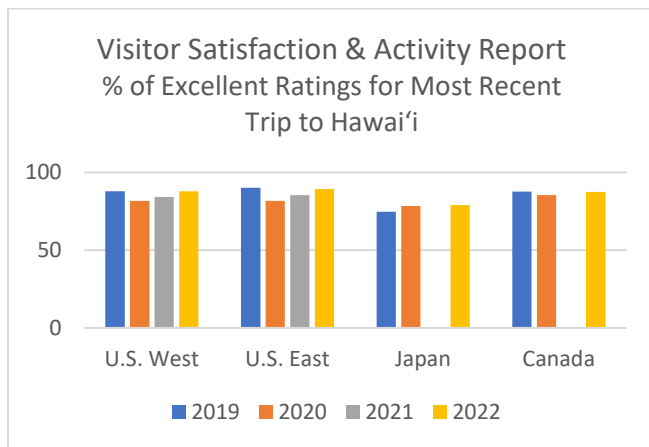
The most notable performance results are how residents care about their quality of life and their feelings about our number one economic driver, tourism. A majority of Hawaii’s residents continue to feel that “tourism has brought more benefits than problems to the islands”. More than 8-out-of-10 visitors enjoy Hawai’i as an excellent place for vacation and an experience that met or exceeded their expectations.

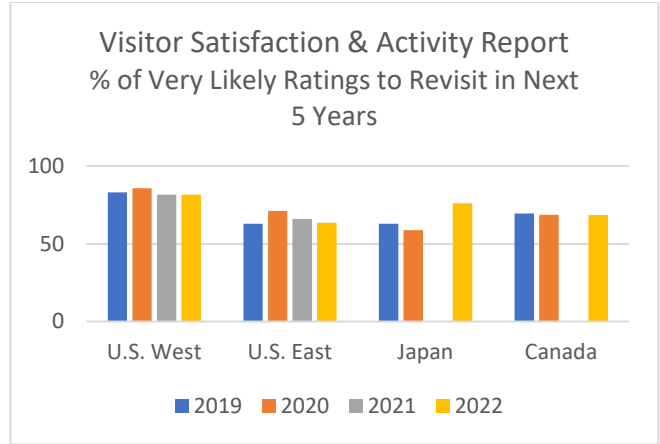
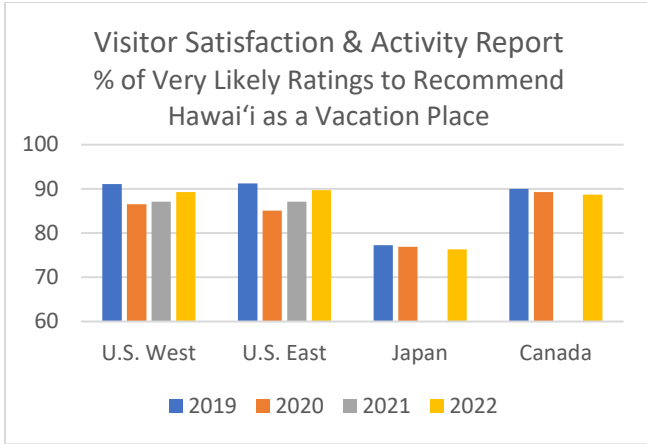


Source: HTA Resident Sentiment Survey conducted by OmniTrak Group.

Experience Indicator – Visitor Satisfaction

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





Source: HTA Visitor Satisfaction & Activity Report conducted by Anthology Research. Japan and Canada markets were not surveyed in 2021 and 2022.

Office of the President and CEO

The Office of the CEO is responsible for implementing the policies and instructions of HTA's Board of Directors and administering the activities of HTA by planning, organizing, directing, coordinating, and reporting its work. Stakeholder Engagement is one of the key areas for the Office.

2023 HIGHLIGHTS:

- Initiated the reorganization of HTA's internal structure to create a Destination Stewardship, expand the Finance, and reassign roles to align with the new structure.
- Ensured procurement, program implementation, and contract management are conducted timely and in accordance with established government processes.
- Presented monthly financial statements, detailed reports from our contractors and programs, and updates on future initiatives at our monthly board of directors' meetings. Archives of board meeting minutes, materials, and recordings can be found at hawaiiitourismauthority.org.
- Initiated procurement for a Governance Study to assess HTA's current governance structure and determine the ideal governance structure to be effective in destination marketing and tourism management. This includes recommendations for policy reform and modifications to HTA's Hawai'i Revised Statutes, Chapter 201B. This study will be completed by June 2024.
- Increased direct communications and engagement with the Senate and House Tourism Chairs to build stronger relationships and awareness of our collective efforts.

2024 Focus

- Implement the reorganization including hiring of critical leadership positions.
- Investigate plans to establish island offices to increase island-based tourism management.

Communications & Public Affairs

(HRS §201B-3(a)20)

HTA's communications and public affairs operation works to keep Hawai'i's residents, lawmakers, visitor industry, and interested parties beyond Hawai'i's shores informed about its programs, initiatives, research, and positions on key issues. HTA does this through the issuance of a monthly electronic newsletter, the distribution of news releases and email blasts, interaction with local, national, and international news media, public presentations across the Hawaiian Islands, quarterly meetings with industry leaders and the mayors of their respective islands, maintenance of social media channels (@hawaiihta on Facebook, Instagram, Threads and X) and participation in major industry events.

2023 HIGHLIGHTS:

- Issued 78 news releases and messages and responded to 113 media inquiries with assistance or interviews between January and October 2023. These numbers do not include Maui Wildfire-related releases and inquiries, which are counted separately in the Maui Wildfire Recovery Efforts section of this report.
- Developed a Tourism Policy page on HTA website to share HTA's testimony and information on various bills. Visit www.hawaiiitourismauthority.org/what-we-do/tourism-policy.
- Published monthly electronic newsletter known as the E-Bulletin that is distributed to over 20,000 stakeholders, including industry, community, elected officials, and interested members of the public. The E-Bulletin recaps our activities across all four strategic pillars, highlights work in our communities and in our source markets, and spotlights events on the horizon.

- Hosted a quarterly meeting with each county mayor, government officials, association leaders, contract partners and the visitor industry to connect with stakeholders from both the public and private sectors to improve awareness and build an understanding of the current state of the visitor industry.
- Launched Holomua, an online platform for sharing collective updates and progress on each of its community-based Destination Management Action Plans (DMAPs). The site features stories, progress reports, and updates related to the DMAPs in the areas of natural resources, Hawaiian culture, visitor education, community programs, regenerative tourism, support for local businesses, tourism management, and more. Visit Holomua at holomua.hawaiiauthority.org.

Wildfire Recovery Efforts

(HRS §201B-3(a)23, 201B-9, 201B-10)

Pursuant to Hawai'i Revised Statutes 201B-3 (a)(23), HTA has a responsibility to develop and implement emergency measures to respond to any adverse effects on the tourism industry. HTA has been actively engaged in the response to the August wildfires on Maui and Hawai'i Island. We've worked closely with federal, state and local officials as well as residents to assist with the recovery and reopening efforts. Below are the highlights of our efforts.

Emergency Response. As the devastating wildfires burned on Maui and Hawai'i Island on August 8, HTA liaisons were in the respective county Emergency Operations Centers. When the state Emergency Operations Center was activated on August 9, HTA leadership was present in the center as a liaison while the rest of the team stood up the Departmental Operations Center (DOC) at the Hawai'i Convention Center (HCC) pursuant to HTA's Emergency Operations Plan. The team staffed the DOC and provided crisis communications support 24 hours per day from August 9 to 12.

Support for Mass Care (Emergency Support Function 6). Facilitated coordination with local and state government agencies and the visitor industry to relocate more than 40,000 people, many of them visitors, off Maui in the first 72 hours of the crisis to focus resources on surviving residents, family members and first responders. In addition, working with the American Red Cross, an Assistance Center at the HCC was stood up and served nearly 300 visitors and residents. The Assistance Center was transitioned to the Keehi Lagoon Memorial Hall and finally closed on August 16, 2023.

External Affairs (Emergency Support Function 15). Continuously coordinated efforts with federal, state and county emergency management officials, as well as community partners, visitor industry stakeholders, and its Global Marketing Team. This includes providing updates to travel partners —airlines, accommodations, ground transportation companies, activity providers, travel agents, and wholesalers, as well as to local, national and international media — to ensure the public was kept informed.

Tourism's Role In Supporting Maui's Recovery.

- **Message To Visitors and Visitor Industry.** Amplified the official messaging of the Governor in regards to travel to the Hawaiian Islands in the aftermath of the Maui fires. Through the end of October, HTA with the support of its communications contractor issued 17 news releases and responded to 124 media inquiries with assistance or interviews related directly to Maui wildfire response and recovery.
- **Emergency HTA board meeting.** Held an emergency meeting on August 15, 2023, pursuant to Hawai'i Revised Statutes §92-8(a). During this meeting, the board formed among its members a Disaster Response Permitted Interaction Group to address Maui's communities and visitor industry impacts.
 - The Joint Incident Action Plan of the Hawai'i Emergency Management Agency and Federal

Emergency Management Agency, FEMA-DR-4724-HI, tasked HTA with tourism and economic redevelopment coordination with an emphasis on strategic public messaging.

- Governor Green declares tourism emergency. On August 19, Governor Josh Green, M.D. issued his sixth emergency proclamation related to the Maui wildfires, declaring that a tourism emergency exists in the state and authorized HTA to utilize the Tourism Emergency Special Fund to respond to the emergency and provide relief under Hawai'i Revised Statutes 201B-10.
- Tourism Recovery Efforts.
 - Developed the Mālama Maui Tool Kit and Recovery Resources, to assist businesses, residents and the travel industry. Visit: www.hawaiitourismauthority.org/maui-recovery
 - Facilitated Return of Cruise to Kahului Harbor
 - Marketing recovery activities implemented:
 - Board approved \$2.6 million in funding on August 31 to launch the Maui U.S. Marketing Recovery Plan, which is centered around a new Mālama Maui campaign and prioritizes rebuilding travel demand from the United States, Maui's largest visitor source market. The campaign continued through mid-November with heartfelt messages shared by kama'āina (residents) of Maui through an integrated marketing efforts in addition to training travel agents and meeting planners who are critical in informing their clients on mindful and responsible travel.
 - Board approved \$900,000 in funding on November 30 to support Maui marketing recovery efforts in the Canadian market for the first five months in 2024 which will be comprised of consumer, travel trade and PR initiatives.
 - Worked with HIEMA's Community Outreach lead to establish a volunteer process to meet the needs of conference/meeting planners and others in the visitor industry who are searching for opportunities to volunteer.
 - Developing a plan of action to help revitalize tourism and support Maui's recovery in a responsible manner. The strategies, actions and budget will be approved at the board's December 21 meeting.

Destination Stewardship

Destination Stewardship is responsible for implementing projects and programs that seek to balance and meet the economic, environmental, and social/cultural needs of Hawai'i while working in close partnership with the visitor industry and residents. This division is responsible for 3 of the 4 strategic plan pillars and implements 6 initiatives: Destination Management, Natural Resources, Hawaiian Culture, Visitor Experiences, Workforce, and Technical Assistance & Capacity Building. This Division also oversees the contract with Council for Native Hawaiian Advancement (CNHA) and their tourism division, Kilohana for support services for destination stewardship which was awarded in May 2023.

Destination Management Initiative

(HRS §201B-3(a)(14), (19) and (22))

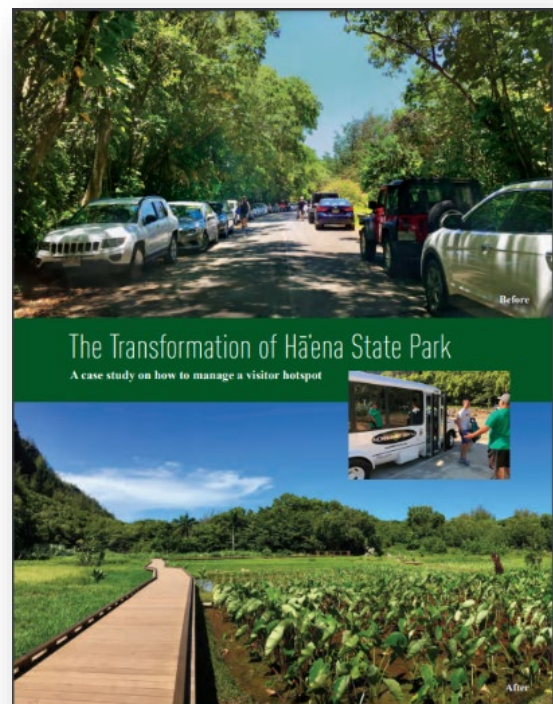
As a result of HTA's 2025 Strategic Plan calling for emphasis on destination management, 3-year community-developed Destination Management Action Plans (DMAPs) were developed for each island to assist in the stabilization, recovery, and rebuilding of the desired visitor industry for each island. DMAPs were created for each island through steering committees made up of residents of those islands representing the visitor industry in addition to other areas such as natural resources, Hawaiian culture, nonprofits, agriculture and technology. HTA also funded Destination Managers positions in each island's visitors bureaus to coordinate and implement the DMAPs with HTA, community, and industry partners.

In 2024, the HTA will focus on implementing the next round of Destination Management Action Plans.

Kaua'i DMAP

2023 HIGHLIGHTS

- Worked with the advisory committee of the Hā'ena State master plan to produce the Hā'ena State Park Case Study playbook. This playbook shares the collaboration with the State, County, area stakeholders and island communities who were focused on mitigating over-tourism challenges and bringing forth a more regenerative model that would benefit the livelihood of the community and the visitor experience.
- Completed the Mālama Kaua'i video series, distributed to HTA's Global Marketing Team and made available on the Kaua'i Visitors Bureau's YouTube channel. These grassroots videos educate and inform our residents and visitors and feature the Kaua'i Museum, National Tropical Botanical Gardens, Mo'olelo Murals and the Prince Kūhiō Park.
- Collaborated with Pacific Media Group on a resident campaign including public service announcements on Kaua'i's four radio stations featuring Mana'o Moments that are in alignment with Kaua'i's DMAP efforts.
- Developed a hui of Kaua'i-based cultural practitioners and resources, Makali'i, to assist and support efforts that sharing our Hawaiian Culture with our visitors and residents alike.



- Featured Kauaʻi DMAP initiatives, including Kauaʻi Made products and the Alakoko Store, on various HI Now stations, their digital platforms, and on Hawaiian Airlines In-Flight Entertainment to promote buying local.

Maui DMAP

2023 HIGHLIGHTS

- Awarded funding to three East Maui based nonprofits (Hōlani Hāna, Ke Ao Hāliʻi and Na Mahiʻai o Keʻanae) to execute the East Maui Tourism Management Pilot Program. HTA and Maui Visitors & Convention Bureau worked with the East Maui Advisory Group to develop the program. These organizations will gather visitor data, conduct resident satisfaction surveys and indepth ʻohana surveys, determine site access and carrying capacity and create community-supported messaging for visitors pre and post arrival.
- Installed 20 mineral-only sunscreen dispensers at popular beaches and locations throughout Maui and one on Lānaʻi to protect our reefs and beaches. Partnered with Maui Nui Marine Resource Council and other private organizations to assist in cleaning and refilling these dispensers on a weekly basis.
- Participated with the Reef Friendly Landscaping Coalition, comprised of Maui Nui Marine Resource Council, West Maui Ridge to Reef, Royal Lahaina, Maui Visitors & Convention Bureau, Beyond Pesticides and SoilThrive to develop the the Reef Friendly Landscaping Pilot Program. This pilot program supported 15 visitor industry and other partners on the island in stopping the use of chemical pesticides and fertilizers on a portion of their property, and in lieu, receiving soil analysis, microbiologically rich soil amendments and ongoing consultation.



Molokaʻi DMAP

2023 HIGHLIGHTS

- Developed post-arrival messaging for Molokaʻi as it pertains to cultural sensitivity, what to expect on Molokaʻi and safety with the Molokaʻi DMAP Task Force sub-committee. The draft brochure contains a map of Molokaʻi and Kaunakaka and a QR code linking to directory of local businesses. This brochure will be brought to a future Molokaʻi community meeting to receive feedback from the larger community.
- Conducted needs assessments targeted at businesses and non-profits interested in expanding into the visitor industry and voluntourism.

Lānaʻi DMAP

2023 HIGHLIGHTS

- Utilized community-driven messaging created by the Lānaʻi advisory group to re-brand their island and revised the Expeditions Ferry and Go Hawaiʻi websites, procured new photo assets, and developed a new social media campaign.
- Created 30-second TV ads to showcase Lānaʻi City, Lānaʻi Cat Sanctuary, Lānaʻi Guide App and the Lānaʻi Adventure Park to encourage meaningful and responsible day trips to Lānaʻi.

Hawai'i Island DMAP

2023 HIGHLIGHTS

- Developed the Keaukaha Community Cultural-based Education Program with the County of Hawai'i including support for stewards, and the creation of cultural, historical, and land-based curriculum by the Keli'i William Ioane Legacy Foundation. The data was shared with the Hawai'i Island County Council to support a longer regenerative stewardship program for Keaukaha, an identified hotspot in the Hawai'i Island DMAP.
- Created opportunities for ongoing dialogue, communications, and engagement to share the Hawai'i Island DMAP efforts and increase resident sentiment about the regenerative tourism industry being built through collaborative efforts and active engagement. Efforts included Tourism Week social media and radio posts, support for agritourism and encouraging purchase of local produce, and development of Food Hub Rack cards educating resort residents about supporting Hawai'i's agriculture industry.
- Replaced deteriorated signs at Waipi'o Valley Lookout with new signage that displays historical and cultural 'ike (knowledge) and mo'olelo (stories) of Waipi'o Valley.
- Launched the Hawai'i Island Community-Based Action Stewardship Program which supported two stewardship contracts to mitigate impacts at Kealakekua and Punalu'u.
 - 'Āina Based Stewardship Program at Kealakekua (Ho'ala Kealakekua Nui, Inc.) includes the development of a web site to educate visitors, residents, and commercial tour operators about proper code of conduct to respectfully interact with Kealakekua Bay and training citizen scientists to monitor the health of the area.
 - Ka'ū Hō'ā Pii 'Āina Training program in Punalu'u ('Ohana O Honu'apo) includes recruiting, hiring, and developing a training program for ten volunteer stewards on how to best serve the 'āina in Ka'ū Moku through a place-based perspective, focusing on culturally and ecologically sound practices in addition to how to best interact with residents and visitors in sensitive places.



O'ahu DMAP

2023 MAJOR HIGHLIGHTS

- Funded an automatic gate at Koko Head Crater with installation to be completed in December 2023 by the City and County of Honolulu. This gate will address residents' concerns regarding access and noise issues.
- Partnered with the City & County of Honolulu's Office of Economic Revitalization and the O'ahu Good Food Initiative which encourages our visitor industry to support our local farmers and buy local. Assisted with two business to business shows and promotion to visitor industry partners to sign the O'ahu Good Food Pledge. This resulted in more than 30 signatories for the year to start baseline data collection.
- Funded Waikiki Improvement Association/Marnie Weeks Productions' Kūhiō Beach Hula Show with performances twice a week to showcase authentic hula on O'ahu for the full 2023 calendar year, which helps to provides for curated experiences on the island.
- Supported Blue Planet's 2023 Commute Challenge: Go Multimodal and targeted two O'ahu resort areas to encourage visitor employees to become multimodal ambassadors in conversations with visitors.

- Worked with the Native Hawaiian Hospitality Association and the Mayor’s Office of Culture & Arts to enhance the Waikīkī Historic Trail and refurbish the surfboard markers.

Natural Resources Initiative

(HRS §201B-7(a)(1) and (3))

Hawai‘i’s natural resources are some of the most precious in the world, located in Earth’s most unparalleled environments and among Hawai‘i’s greatest assets as a travel destination. The HTA supports a variety of environmental programs and initiatives in partnership with communities statewide – as well as federal, state and county agencies – to protect Hawai‘i’s natural resources today and preserve them for future generations.

2023 HIGHLIGHTS

- Awarded \$1,350,000 to 25 community-based natural resource programs through June 2024. Through its partnership with the Hawai‘i Community Foundation, an RFP was released in April 2023 for HTA’s Aloha ‘Āina Program, which aims to manage, conserve and revitalize Hawai‘i’s natural resources and environment.
- Rebranded the Aloha ‘Āina Program to the Kahu ‘Āina Program in the Fall 2023, which is administered by Kilohana. Kilohana launched an online portal (‘Umeke) in October 2023 to receive proposals for the 2024 Kahu ‘Āina Program. The proposals will be reviewed in December.

2024 Focus

- Execute the Kahua ‘Āina program in 2024.

Hawaiian Culture Initiative

(HRS §201B-7(a)(9)(b)(5)(A),(B),(C),(D))

Native Hawaiian culture is at the heart of our islands’ uniqueness. The spirit and significance of the Native Hawaiian culture is integrated into every element of HTA’s programs. There continues to be a resurgence of the Hawaiian language and Hawaiian cultural practitioners within the tourism industry. HTA is committed to supporting programs that perpetuate the integrity of the Native Hawaiian culture through unique and genuine visitor experiences that differentiate Hawai‘i from other destinations around the world.

2023 HIGHLIGHTS

- Awarded \$1,350,000 in financial support to 28 community groups and cultural practitioners through its partnership with Hawai‘i Community Foundation to administer HTA’s Kūkulu Ola Program, which aims to enhance, strengthen, and perpetuate Hawaiian culture through genuine experiences.
- Supported the Native Hawaiian Hospitality Association (NaHHA) in bridging the gap between the Hawaiian community and the visitor industry. For the first half of 2023, they successfully provided training & education, product & business development, and administrative/technical services. From March 16, 2023 to June 30, 2023, NaHHA placed various training curriculums in front of 807 participants, conducted in 16 sessions with participants attending from five different countries (United States, Canada, Japan, Thailand, Chile).
- Funded Phase III of He Aupuni Palapala with Bishop Museum which catalogs, preserves, digitizes, and makes available Nūpepa (Hawaiian language newspapers). 11,652 Nūpepa pages were processed and digitalized.
- Contracted Kilohana to administer the 2024 Kūkulu Ola Program. A new online portal (‘Umeke) launched in October 2023 for applicants to submit proposals for the 2024 Program. Proposals will be reviewed in December 2024.

2024 Focus

- Execute the Kūkulu Ola program in 2024.
- Work on the Hawaiian Culture Initiative/Ma‘ema‘e Program.

Visitor Experiences Initiative

(HRS §201B-3(a)(16) and (19); HRS §201B-7(a)(1) and (3))

The Visitor Experiences Initiative is comprised of the following programs: Community Enrichment Program, Signature Events, Resort Area for Hawaiian Culture, Pono Travel Education Program (post-arrival marketing), Kahea Greetings Program, Visitor Assistance Program, and Smart Tourism.

2023 HIGHLIGHTS

- Supported 63 projects with \$1.7 million in funding under the 2023 Community Enrichment Program (CEP). Contracted with HVCB to administer 2023 CEP, which supports community-based projects and experiences that encourage tourism diversification in the areas of agriculture, culture, culinary, education, health and wellness, nature, sports, and voluntourism.
- Awarded 13 projects in the amount of \$2 million under the 2023 Signature Events program. HVCB was contracted to administer the 2023 Program, which supports major festivals and events that provide a unique and enriching experience, perpetuate Hawaiian culture, and celebrate the islands’ multi-cultural diversity and community.
- Contracted Kilohana to administer the 2024 CEP, Signature Events, Resort Area for Hawaiian Culture, and Smart Tourism programs. Like the Kahu ‘Āina and Kūkulu Ola programs, a new online portal (‘Umeke) was launched in October 2023 for applicants to submit proposals for the 2024 CEP, Signature Events and Resort Area for Hawaiian Culture programs. Proposals will be reviewed in December 2024.
- Supported the Kāhea Greeting Program in partnership with the Department of Transportation- Airport Division, Kaua‘i Office of Economic Development, Destination Hilo, and Destination Kona Coast. This program contributes toward ensuring a positive first and last impression of the Hawaiian Islands for visitors arriving at our airports and harbors. The Kahea program continued hosting Hawaiian entertainment, cultural demonstrations and other activities greeting cruise ship visitors at Nāwiliwili, Hilo, and Kailua-Kona harbors and airline arrivals at Honolulu, Kahului, Līhu‘e, Kona and Hilo airports.
- Developed post arrival messaging at the airports throughout Hawai‘i as part of HTA’s responsible visitor education activities.
- Aided visitors and their families that have suffered theft, illness, and death through support for the Visitor Assistance Programs across all four counties as part of our safety and security responsibilities.

2024 Focus

- Fund the 2024 CEP, Signature Events, Resort Area for Hawaiian Culture and Smart Tourism programs.
- Test messaging at targeted prime locations throughout Hawai‘i airports and to determine opportunities for expansion.
- Fund the 2024 Kāhea Greeting Program at harbors and airports.
- Support the Visitor Assistance Program in all four counties.

Workforce Development Initiative

(HRS §201B-3(a)(21))

HTA continues to address the changing needs of today’s tourism industry workforce by collaborating with educational institutions to make training available to residents working in travel and hospitality, while helping to

enhance their quality-of-service skills. Sustaining tourism’s success also depends on developing the next generation of Hawai’i’s workforce, at all levels of employment, to carry the industry forward.

2023 HIGHLIGHTS

- Funded the Ho’oilina Scholarship Program which awards scholarships to college-bound Hawai’i public high school seniors based on demonstrated academic achievement, leadership skills and an expressed interest in pursuing a hospitality, tourism or culinary education and career. Awardees also include community college students who are Hawai’i residents, graduated from a Hawai’i public high school, completed their associates degree in hospitality, tourism, or culinary, and are transferring into the junior academic school year.
 - Spring 2023: 9 scholars from the 2019 cohort graduated from the University of Hawai’i Mānoa TIM school.
 - Spring 2024: 7 scholars from the 2020 cohort are on target to graduate from the University of Hawai’i Mānoa TIM school and 1 to graduate from UH West O’ahu.
- Supported ClimbHI’s LEI (Leadership Exploration Inspiration) Program which inspires Hawai’i youth to select careers in the Hawai’i visitor industry by providing them with the necessary means to achieve success. In March and April 2023, LEI took place on four different islands (Maui, O’ahu, Kaua’i, and Hawai’i Island) with participation by more than 700 high school and college students and over 100 businesses from across the state.



2024 Focus

- Execute a Workforce Development Plan that provides for collaboration and partnerships with entities such as the state’s Department of Labor & Industrial Relations, University of Hawai’i School of Travel Industry Management, the Department of Education, Hawai’i Hotel & Lodging Association, and the Hawai’i Chamber of Commerce.

Brand

(HRS §201B-3(a)(10),(15),(18),(22), HRS §201B-6, and HRS §201B-7(a)(1),(4),(5)(6))

HTA contracts marketing organizations – collectively known as its Global Marketing Team (GMT) – to promote the Hawaiian Islands worldwide. The GMT’s coverage for leisure marketing in 2023 includes the U.S., Canada, Japan, Oceania, Korea, and China. Consistently, for business marketing, the Meet Hawai’i team targets the same geographic regions for the meetings, conventions, and incentive groups. Under HTA’s direction, communication and education by the GMT and Meet Hawai’i focus on welcoming high-value mindful travelers and groups back in a safe, sustainable, and regenerative manner. Mālama Hawai’i is the core brand message delivered across the markets with support of and partnership with media, travel trade, and other industry partners both in market and in Hawai’i. In August, in the wake of devastating Maui wildfires, marketing contractors pivoted its messaging and efforts to Mālama Maui.

United States

The U.S. market continued to lead visitation to Hawai’i while international markets are still recovering. In September 2023, a total of 482,822 visitors arrived from the U.S. This was a slight decline compared to 2022, which saw 566,189 visitors in September, and still an incline from 2019, which welcomed 438,993 visitors. Total spend was \$1,010,100,000 in September 2023, down from \$1,195,800,000.00 in 2022, but up from \$335,500,000 in 2019. In addition to the COVID-19 pandemic, the wildfires on Maui in August 2023 added another layer of recovery to Hawai’i tourism, which HTUSA has addressed immediately with an extension of the Mālama Hawai’i messaging to focus mindful travel back to the islands, especially Maui.

2023 HIGHLIGHTS

- Partnered with Kanu Hawai’i to update its GoHawaii.com site experience for users looking to volunteer and give back while visiting Hawai’i. This comprehensive list will allow visitors to see updated schedules and activities and even the ability to book directly on our website.
- Awarded the Web Marketing Association’s Outstanding Achievement in Web Development Award, which recognized the proper usage of Hawaiian orthography on our HTA and GoHawaii websites and furthers our efforts to preserve Hawai’i’s authentic culture and accurately represent our Hawaiian language.
- Hosted a Satellite Media Tour (reaching an audience of 2.6M as of November) and Entertainment Tonight on Maui (reaching an audience of 4M daily), and executed Media Blitzes on the road on both the East and West coasts to support ongoing Maui recovery following the wildfires.
- Participated in Signature Travel Network’s 2023 Owners’ Meeting in Maui which hosted approximately 200 attendees.

This event was able to support a variety of Maui relief efforts including raising \$400,000 in donations and silent auction proceeds for the Hawai’i Community Foundation’s Maui Strong Fund, Maui Food Bank, and Maui Humane Society.



2024 Focus

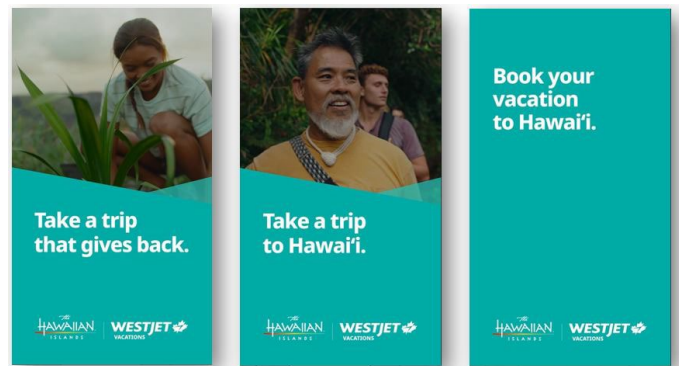
- Enhance the Mālama Hawai'i campaign in an impactful way through a co-marketing effort with a prominent retailer brand to encourage visitors to buy and support local. This campaign will feature local Hawai'i designers and their stories that are unique to each island.
- Expand the Mālama Hawai'i campaign to include more stories that highlight island ambassadors in different areas of expertise and experiences throughout our islands, including food, integration of Hawaiian culture through the arts and practices, and others.

Canada

Canada's economy had a steady recovery after the COVID-19 pandemic economic crisis. Canadians have been travelling again taking longer trips and spending more in general. However, the exchange rate of the Canadian versus the U.S. dollar is deterring Canadians to travel to the U.S. and Canadians are looking into options where they can get more value for their dollar. Through September, compared to the same period of 2019, arrivals from Canada to Hawai'i has recovered nearly 83% with expenditures surpassed by 4.7%. In 2023, Hawai'i Tourism Canada (HTCAN) continues to focus on market education, training the travel professionals and media to become Mālama advocates in addition to conducting digital campaigns, PR efforts, and travel trade partnerships.

2023 HIGHLIGHTS

- Organized the Mālama Hawai'i product development familiarization trip (FAM) consisting of seven product managers from WestJet Vacations, HotelBeds, TravelBrands, Groupe Voyages Quebec, Senior Discovery Tours, Voyages Gendron, and Toundra Voyages. The group visited Kaua'i and Maui and itinerary included beach cleanup, visiting Hanapēpē Arts Night and Maui Dragon Fruit Farm to support local businesses. As a result of the trip, five new itineraries have been created with two more in the process of development.
- Participated in Salon International Tourisme et Voyages in Montréal, Québec at the Montreal Congress Centre. The show welcomed 25,000+ visitors coming from the Montréal area, which are mainly French speakers. HTCAN was able to meet with over 950 attendees sharing Mālama Hawai'i / Mālama Maui messaging.
- Executed a 3-month campaign in partnership with WestJet sharing the mālama message from March to May 2023. WestJet also broadcasted the Mālama Hawai'i videos on its YouTube channel, lounge at the Calgary airport, and all Hawai'i bound flights. This campaign generated more than 3.5 million impressions.



2024 Focus

- Grow mālama advocates through education and collaboration will continue to be the key strategy in promoting the Hawaiian Islands.
- Focus on Maui recovery by targeting mindful travelers including the snowbirds of all ages and the retirees.

Japan

The Japanese government gradually lifted pandemic restrictions from 4th quarter in 2022. However, the return of Japanese to Hawai'i has been tempered by weakened yen, high fuel surcharge, intense competition, and the country's initial focus to recover domestic travel. Through September, Hawai'i's Japanese visitor market recovered 32% of pre-pandemic level. Air capacity for the first nine months (740,118 seats) was much greater compared to 2022 but remained below the same period of 2019 (1,498,414 seats). Despite the slow recovery, Hawai'i Tourism Japan (HTJ) keeps focusing on educating the consumers, travel trade and media on the latest of Hawai'i, and utilizing an integrated approach through advertising, public relations, digital, social and events to raise brand awareness and drive travel demand for Hawai'i.

2023 HIGHLIGHTS

- Launched “Beautiful Hawai'i - Travel Can Make the World Beautiful” on May 26, the day before Hawai'i EXPO 2023, with 221 influencers, writers, and editors in attendance, resulting in 435 media exposures and over 82 million impressions. Various advertisements were also placed via out of home, television, social, digital, taxi, trains, and train stations.
- Executed Hawai'i EXPO 2023, a consumer event in Shibuya, Tokyo on May 27-28 with the theme "Feel Beautiful Hawai'i". HTJ shared Hawai'i's latest information with 50 stakeholders and conducted 10 workshops and talk shows with 12,146 event participants. Seven Hawai'i product exhibitors participated, and the stage content including Hawaiian music and hula performance was live streamed on mele.com for two days, with 20,579 views.
- Organized the Japan Summit from April 21 to 23 at Hawai'i Convention Center, which consisted of seminars and B2B sessions. It was well attended by 26 Japanese travel agencies (82 people) and 94 Hawai'i marketing partners (180 people), including hotels, attractions, and transportation. In addition, all Japanese travel agents experienced a Mālama Hawai'i tour including visiting new facilities and volunteer activities.



2024 Focus

- Work with industry partners to rebuild and recover the Japanese market in a responsible manner.
- Focus on sharing Hawai'i's unique brand stories to connect Japanese visitors with the local community and target pono travelers for each of the islands.
- Collaborate with government agencies and major airlines to restore suspended flights to Hawai'i.

Oceania

Hawai'i stands out against other destinations because the heritage, culture and spirit of aloha epitomize what it means to live harmoniously with the land. Hawai'i Tourism Oceania (HTO) communicates this philosophy by highlighting the connections that the people of Hawai'i have to the land, ocean and mountains and how visitors from Australia and New Zealand can experience and be a part of this special bond. In the first half of 2023, there were 88,383 visitors from Australia, compared to 52,931 visitors (+67.0%) in the first half of 2022. There were

132,710 visitors (-33.4%) in the first half of 2019, prior to the COVID-19 pandemic. In the first half of 2023, there were 25,265 visitors from New Zealand, compared to 1,923 visitors (+1,213.5%) in the first half of 2022 and 33,167 visitors (-23.8%) in the first half of 2019. This year, the pent-up demand for travel was evident with many Australians and New Zealanders immediately booking high-value bucket-list trips and traveling to reunite with friends and family after two years of separation. Hawai'i experienced an increase in both length of stay and per person per day spending from the Oceania market. Flight capacity and the value of the USD remain our two biggest barriers to increasing visitation back to 2019 numbers.

2023 HIGHLIGHTS

- Initiated the “Month of Lei – The Hawaiian Islands Destination Training” with Hawaiian Airlines in Sydney, Melbourne, Brisbane, and Auckland with the Island Chapters during April 27-May 4, 2023. During the week, over 200 travel advisors attended Month of Lei – The Hawaiian Island Destination Training across Australia and New Zealand. Hawai'i Tourism Oceania and Hawaiian Airlines also launched a Month of Lei Incentive program to promote the multi-island itinerary for a trade agent fam later in October.
- Partnered with Brand USA and Hawaiian Airlines to showcase the islands of Kaua'i and O'ahu during the Brand USA and Hawaiian Airlines Mega Famil on June 10-14, 2023 to 48 travel advisors from Australia and New Zealand. Mega Fams are an integral part of Brand USA's marketing strategies; creating awareness of the diversity of U.S. destinations and giving the travel trade the confidence to sell the multitude of travel experiences throughout the USA.

2024 Focus

- Attract the Australian and New Zealand visitor to Hawai'i that not only provide the most economic benefit, but who will also engage meaningfully and respectfully with the kama'āina (residents), mo'omeheu (culture), 'āina and kai.
- Focus on positioning The Hawaiian Islands as a destination with offerings for mindful travelers, continuing to educate the repeat visitor and also seeking out high-value travelers who are less impacted by economic conditions.

Korea

In response to the post-pandemic resurgence in the desire to travel abroad in Korea, Hawai'i Tourism Korea (HTK) strategically focuses its marketing efforts to position Hawai'i as a “must-go” destination for travelers seeking authentic and unique experiences. HTK actively engages in close communication and cooperation with its trade partners, high-profile consumer brands, and media outlets to deliver *Mālama* and *Kuleana* messaging. Through September, Korean visitors to Hawai'i recovered 74% while visitor expenditures reached 85% of 2019 level.

2023 HIGHLIGHTS

- Partnered with two leading online travel agencies (OTAs), Tidesquare and InterparkTriple, and one of the top wholesalers, Mode Tour, to jointly promote regenerative tourism of Hawai'i. The promotion focused on showcasing the beauty of Hawai'i while providing information on sustainable accommodations, Hawai'i eateries and small businesses, cultural classes and giving back activities.

- Promoted Hawai'i through the reality travel TV show, "Monopoly Game World Travel - Hawai'i Episode," starring top three celebrity travel YouTubers who together have over 3.5 million followers. Viewers were introduced to iconic landscapes and many local businesses and eateries. The two Hawai'i episodes, shown on Netflix, ENT, TVING, generated over 5 million in AVE and achieved the highest rating of the entire show series on Netflix.
- Participated in the Green Allure Festival to position Hawai'i as an ultimate wellness travel destination in sync with Korean consumer trends. Campaign results included digital reach of 1.46 million, 500 check-ins at the Hawai'i booth and four-page article in Allure's May issue.

2024 Focus

- Focus on fully recovering the Korean travel demand for Hawai'i to the pre-pandemic level.
- Support new airlift, promote Hawai'i's signature festivals and events, eco-friendly initiatives, volunteer programs, and Made in Hawai'i products.
- Strengthen the overall brand recognition of the Hawaiian Islands.



China

China removed all domestic and international travel restrictions starting in January 2023. Chinese outbound tourism is projected to recover to pre-pandemic level by the end of 2024, with a preference for countries perceived as safe and offering straightforward visa processes. The number of flights between U.S. and China per week continues to increase. From September 30, the number of flights doubled from 24 to 48. Beginning on November 9, the number of weekly flights increased to 70. Social media and online booking have become increasingly crucial, especially with the prominence of FITs and customized small groups. HTC is committed to elevating brand awareness and promoting Mālama Hawai'i through its digital and social media channels as well as leveraging partners' platforms and resources.



2023 MAJOR HIGHLIGHTS

- Continued strengthening Hawai'i's presence on key social media channels, including WeChat, WeChat Video Channel, Weibo, Red, and Douyin. Through October, HTC has made 183 posts which gained nearly 250,000 interactions across the platforms.
- Participated in 10 road shows organized by the U.S. Embassy and Consulates and Education USA with over 10,000 people in attendance. Key road shows to share Mālama Hawai'i messaging included education/college fairs in Beijing and Shanghai, travel and tourism fairs in Chengdu, Guangzhou and Wuhan.
- Conducted 11 travel trade education seminars in partnership with Jupiter Legend, Spring Travel, Ctrip, Tuniu, CYTS, Discover America Committee. A total of 409 agents participated from China's first and second tier cities. HTC also organized a travel trade education FAM for Jupiter Legend Travel, North American subsidiary

of Ctrip.com in February. The 82 FAM participants experienced Mālama activities at Kualoa Ranch, USS Missouri, and Polynesian Cultural Center.

2024 Focus

- Focus its efforts on social media marketing across major platforms and participate and engage with the U.S. Embassy, Consulates and Brand USA to promote the Hawaiian Islands in their events and roadshows.
- Coordinate a travel mission from Hawai'i to China and participate in ITB-China, a leading B2B-exclusive trade show for the Chinese travel market.

Global Meetings, Conventions and Incentives (MCI)

Growing economic challenges like inflation, high airfare and hotel rates and staffing/supply chain challenges are beginning to influence the way MCI customers are choosing destinations for their events. New research shows that MCI customers are opting for destinations close to where attendees live to offset cost increases. The re-opening of international destinations has added new competitive pressures to Hawai'i in 2023. In 2021 and 2022, Hawai'i enjoyed the absence of overseas competition, but the opening of Europe is attracting MCI events with lower event meeting costs and the lure of returning to popular European destinations. Meet Hawai'i will continue to lead the



charge to identify, cultivate and book both domestic and international events for Hawai'i. The immediate priority is to fill the Hawai'i Convention Center in 2025 through 2029 while simultaneously navigating the challenges of when construction to fix the roof will commence and what impacts and ramifications this will present in signing business. The nimbleness of our citywide and single property teams in implementing the plan will maximize Hawai'i's opportunities to secure bookings for the short-term need years and beyond as the booking windows for both citywide and single property bookings continue to shorten.

2023 Major Highlights

- Continued to highlight Hawai'i's sustainable efforts as part of the competitive selling process with Mālama Hawai'i – CSR (Corporate Social Responsibility) experiences, community and Native Hawaiian partnerships, and locally owned and operated vendors and services. Attendees' growing preference for conferences hosted using sustainable practices is also impacting how meeting professionals are choosing destinations for their events.
- Economic boost of \$42 Million to the state from the American College of Chest Physicians Conference.
- Named "Best Convention Center" by Smart Meetings magazine.

2024 Focus

- Work with the airlines to cross-reference leads and potential opportunities.
- Distribute regular electronic newsletters to client database to ensure they are aware of product developments/updates in Hawai'i.
- Target key corporations with in-house event organizers.
- Implement a sales call calendar throughout the year to meet with potential clients and create new opportunities to partner via appropriate activities.

Cruise Consultant Services

2023 marks the first year since 2020 that the full global fleet has returned to service. Cruise lines reported higher yields on ticket sales and onboard revenue continued to meet or outpace 2019 records. The focus for Hawai'i in 2023 was to create a solid strategy for re-building, maintaining and diversifying a sustainable cruise market. Confidence needed to be rebuilt between the cruise lines and the local community post-pandemic. HTA and its consultant services provider, Access Cruise, worked collectively with local cruise stakeholders to provide information to the community on the benefits of the cruise industry while educating the cruise lines on the Mālama Hawai'i marketing campaign. The emphasis on connecting with the culture, giving back to Hawai'i and preserving it for the future, while following safe health practices was all positively received.



2023 Major Highlights

- Organized a familiarization trip for Carnival Cruise Line executives to connect with local tour operators and several government agencies to discuss developing Mālama itineraries on Kaua'i and Maui and investment with local tour operators to support human resource efforts to ensure a positive and curated experience for cruise guests.
- Actively worked with cruise lines to encourage them to incorporate Mālama Hawai'i/Mālama Maui messaging and projects. To date, both Carnival and Crystal Cruises intend to launch Mālama projects supporting Maui recovery.
- Maintained cruise calls as well as nurtured relationships for long-term collaborative partnerships that allow the cruise brands to align and educate guests based on community needs and HTA's regenerative direction - 408 sales calls with the cruise lines and 241 calls with local stakeholders including island chapters and government agencies. The consultant also assisted in developing new cruise business, and has garnered a strong interest of American Cruise Line for a potential home ported ship in Hawai'i in future years.

2024 Focus

- Grow the market share for the premium, luxury, and niche market brands to the Hawaiian Islands, including attraction of European luxury lines and small U.S. flagged brands.
- Engage with the local community members and key cruise stakeholders on each island.
- Additional focus placed on the Mālama Maui programs and how the cruise lines can engage and give back to the Maui community.

Island Destination Brand Management and Marketing Services

Island Destination Brand Management & Marketing Services provide representation for each of the islands and works closely with HTA, its Global Marketing Team members and the numerous tourism industry partners and community members to bring awareness to each island's unique concerns, accommodations, activities, and tours. The contractor assists by developing approved familiarization trips and press trips, traveling to Major Market Areas to support approved trade shows and missions, and coordinating with local government officials

and organizations for crisis management and environmental impact related to visitors and/or the visitor industry.

2023 Major Highlights

- Conducted 74 destination trainings, supported 18 FAMs, and participated in 73 tradeshows and missions.
- Deployed Maui staff to the Maui County EOC throughout the Maui Wildfire Disaster.
- Designed and conducted an O’ahu FAM in September that was strategically focused to provide the GMT the knowledge and tools to bring their markets back to Hawai’i post-pandemic. The FAM re-engaged GMT members in Hawaiian history and culture by visiting ‘Iolani Palace and experiencing their specialty tours, engaging with a historical figure at the Mission Houses Museum, learning the legal and political history at the King Kamehameha V Judiciary Museum, and making lei po’o with a lei master to understand sustainability, culture, and mālama.
- Awarded the 2024 contract for Island Destination Brand Management & Marketing Services to Hawai’i Visitors and Convention Bureau.

Sports

Sports are an important component of HTA’s community and branding strategy. Sports events attract fans and foster the desire to visit Hawai’i through media exposure while giving residents opportunities to see world-class athletes compete in Hawai’i and support Hawai’i’s youth and culturally significant sports.

2023 Major Highlights

- Partnered with the World Surf League to allow local surfers the opportunity to qualify for larger events by hosting Challenger Series events in state.
- Entered a partnership with the LA Clippers which included marketing opportunities, donation of a state-of-the-art technology lab at Washington Middle School and their preseason game played at the Stan Sheriff Center (October 8) with more than 9,000 in attendance. L.A. clippers donated ticket proceeds to the Maui recovery effort.
- Led efforts to secure the Maui Invitational in the aftermath of the fires, working collaboratively with event organizers and UH Athletics to host the event on O’ahu (November 20-22).
- Supported the IRONMAN Women’s World Championship in Kona (October 14) with over 1,000 Participants.



2024 Focus

- Work with the PGA Tour to ensure the success of their events – Aloha Swing and the Sentry Tournament.
- Seek to partner with events in our key international source markets.
- Continue to look for new and innovative partnerships with teams and leagues that will drive target-traveler considerations and create both an economic and community benefit.

Planning and Evaluation

(HRS §201B-3(a)(14) and (16), §201B-7(a)(2) and (3), §201B-7(b)(1)

HTA is charged with strategically planning for the near, mid, and long-term health and vitality of our visitor industry and manage destination issues that affect communities and the visitor experience. This includes the development, monitoring, and evaluation of various HTA programs and plans including but not limited to the Strategic Plan, the Destination Management Action Plans (DMAPs), and the Tourism Management and Marketing Plan.

2023 HIGHLIGHTS

- Developed a program monitoring and evaluation system for HTA's programs and activities.
- Administered the U.S. Economic Development Administration (EDA) non-competitive travel, tourism and outdoor recreation grant (\$14,024,372). The grant administration plan was approved by EDA in February. Approximately \$7.2 million was provided to the Department of Land and Natural Resources for projects that support outdoor recreational assets; \$4 million was used for U.S. marketing and travel trade co-op activities; and \$1.5 million will be used for tourism product development.
- Partnered with Hawai'i Food Hub Hui in a May webinar to educate and connect Hawai'i's visitor industry food hubs in Hawai'i.
- Started efforts with Kilohana to develop a tourism quality assurance program – a certification rating program to grow responsible, sustainable businesses in our visitor industry.
- Oversight of needs assessments targeted at Hawai'i businesses and community organizations to understand current challenges and opportunities for those currently operating or considering operating within the visitor industry.

2024 Focus

- Create Destination Management Action Plans: 2024-2027.
- Develop a Workforce Development Plan for HTA.
- Evaluate of HTA's programs and create dashboards for tracking purposes.
- Administer EDA grant, coordinate with DLNR and execute tourism product development projects.
- Finalize the components of the tourism quality assurance program for execution.

Finance

HTA completed the follow-up to the 2018 Hawaii State Legislative Auditor audit report. The Audit reported that 92% of the findings have been corrected and no further action is required.

Hawai'i Convention Center

(HRS §201B-3(a)(24), (HRS §201B-8)

The event activity at Hawai'i Convention Center (HCC) for the first nine months of 2023 has been very strong. HCC has serviced 197 licensed events, including 10 city-wide events. The 10 city-wide events have brought in over \$150 million and \$17 million in visitor spending and tax generation, respectively. The financial performance for the nine months ended September 30, 2023, has also outperformed budget expectations. Facility gross revenue was \$15.2 million including \$155,200 of interest income which exceeded budget by over \$3.8 million. The facility's net loss was \$757,300 which was over \$3.4 million better than planned. Factoring in local sales and marketing expenses, the total subsidy to HCC was \$1.5 million, which was \$3.4 million better than budgeted.

2023 Major Highlights

- Continued progress on significant infrastructure upgrades and maintenance projects in 2023. This includes the installation of a new security camera system, replacement of exterior signage and damaged windowpanes, and repairs to escalators.
- Maintained its LEED Gold Existing Buildings (LEED v4 O+M) since 2017, with a strong focus on indoor air quality, transportation, and staff and guest comfort.
- Continued client education and outreach of the Center's Carbon Offset Program. Through the planting of endemic Hawaiian trees, a meeting at the Hawai'i Convention Center can be 100% carbon neutral. As of September 2023, our clients have contributed a total of \$15,952.77 in carbon offset which equates to the planting of 199 trees. This is also equivalent to 195.82 MTCO₂e (Metric Tons of Carbon Dioxide Equivalent).
- Carried out community events and outreach efforts through a sold-out Mother's Day Concert featuring Na Leo Pilimehana, unveiled two new Hawaiian cultural exhibits, and introduced new Lobby E-Bars and permanent artworks by local artists to enhance shared spaces.
- Named one of EXHIBITOR magazine's 2023 Centers of Excellence, acknowledging its outstanding performance in various categories related to convention centers.
- Received the 2023 Facilities & Destinations (F&D) Magazine Prime Site Award.

Financial Highlights: Hawai'i Tourism Authority and Hawai'i Convention Center

HAWAI'I TOURISM AUTHORITY

Fiscal Year FY 2023 Actuals

REVENUES	
Allotted ARPA Funds	60,684,372
Interest and investment income*	846,299
Other	<u>37,079</u>
TOTAL REVENUES	61,567,750
EXPENDITURES	
Perpetuating Hawaiian culture	4,221,928
Natural resources	1,440,000
Community	3,066,873
Branding	39,435,582
Sports	2,717,000
Safety and security	626,207
Tourism research	236,402
Planning	357,821
Administrative	1,894,879
Governance (org-wide)	<u>1,052,229</u>
TOTAL EXPENDITURES	55,048,921

HAWAI'I CONVENTION CENTER

Fiscal Year FY 2023 Actuals

REVENUES	
Facility Rental	6,545,111
Food and Beverage	<u>7,901,374</u>
TOTAL REVENUES	14,446,485
EXPENSES	
Facility Expenses	12,747,563
Food and Beverage	<u>5,439,243</u>
TOTAL EXPENDITURES	18,186,806
Net income (loss) from Operations	(3,740,321)
Expense for Small Furniture and Equipment	(225,353)
Net Income	(3,965,674)

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

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

AVIAREPS Marketing Garden Holdings Ltd. - CON 20007: Hawai'i Tourism Inbound Destination Marketing Management Services in the Korea Major Market Area

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

Bishop Museum - CON 20195: He Aupuni Palapala: Preserving & Digitalizing the Hawaiian Newspaper

The Walshe Group Pty Ltd dba Hawai'i Tourism Oceania - CON 21019: Hawai'i Tourism Inbound Destination Marketing Management Services in the Oceania Major Market Area

Hawai'i Visitors and Convention Bureau - CON 21030: Island Chapters Support Services

Hawai'i Community Foundation - CON 21033: HTA x HCF Implementation of Kūkulu Ola & Aloha 'Āina Programs

Hawai'i Visitors and Convention Bureau - CON 21038: CEP & DMAP Implementation & Communications for Kaua'i, O'ahu, Maui Nui, and Hawai'i Island

PROCUREMENTS OVER \$100,000 FOR CALENDAR YEAR 2023

Hawai'i Visitors and Convention Bureau - CON 23003: Hawai'i Tourism Destination Brand Marketing & Management Services for United States Major Market Area

A.LINK LLC - CON 23004: Hawai'i Tourism Destination Brand Marketing & Management Services for Japan Major Market Area

PGA Tour, Inc. - CON 23005: PGA 2023 – Aloha Swing

Council for Native Hawaiian Advancement - CON 23008: Support Services for Destination Stewardship

ASP North America LLC dba World Surf League Hawai'i - CON 23009: World Surf League

LA Clippers - CON 23010: LA Clippers

Ladies Professional Golf Association - CON 23011: 2023 LPGA Lotte Championship Partnership

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

State Foundation on Culture and the Arts - CON 23015: 2023 Statewide King Kamehameha Celebration

State of Hawai'i, Department of Transportation, Airports Division - MOA 21039: Kahea Program Airport Greetings

Hawai'i Visitors and Convention Bureau - CON 22003: Global MCI Marketing & Management Services for the Hawaiian Islands

Hawai'i Visitors and Convention Bureau - CON 23003: Hawai'i Tourism Destination Brand Marketing & Management Services for United States Major Market Area

A.LINK LLC - CON 23004: Hawai'i Tourism Destination Brand Marketing & Management Services for Japan Major Market Area

PGA Tour, Inc. - CON 23005: PGA 2023 – Aloha Swing

Council for Native Hawaiian Advancement - CON 23008: Support Services for Destination Stewardship

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

VoX International Inc. - CON 23016: Hawai'i Tourism Destination Brand Management & Marketing Services for Canada Major Market Area

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Rider Levett Bucknall - CON 24001: Project Management/Construction Management Services for The Rooftop Terrace Deck – Full Repair, HCC

Pacific Rim Concepts, LLC - CON 24002: Tourism Conference Service Provider 2023

Big West Conference - CON 24003: 2024-2026 Big West Conference Partnership

Emotive Travel Marketing Ltd - CON 24004: Hawai'i Tourism Destination Brand Management & Marketing Services for the Europe Major Market Area

VoX International Inc. - CON 24005: Canada MMA Maui Recovery Plan

Hawai'i Visitors and Convention Bureau - CON 24006: U.S. MMA Maui Recovery Plan

PGA TOUR, Inc. - CON 24008: PGA 2024 – Aloha Swing



Hawai'i Convention Center
1801 Kalākaua Avenue
Honolulu, Hawai'i 96815
(808) 973-2255
hawaiiauthority.org

Facebook: facebook.com/hawaiihta
Instagram: @hawaiihta
Twitter: @hawaiihta