An aerial photograph of a deep, lush green valley. A river winds through the center of the valley. In the foreground, a dark sandy beach meets the ocean. The sky is filled with soft, colorful clouds, suggesting a sunrise or sunset. The overall scene is vibrant and scenic.

2017  
ANNUAL REPORT  
TO THE  
HAWAII STATE  
LEGISLATURE

HAWAII TOURISM  
AUTHORITY





Message from the President/CEO and Board Chair .....	2
Hawai'i Tourism Authority Board of Directors .....	3
2017: Improving Tourism for Hawai'i's Future .....	4-5
Overview of the Hawai'i Tourism Authority .....	6
Measures of Success .....	7
Transient Accommodations Tax Collections .....	8-9
Hawai'i Tourism Authority Fiscal Year 2017 Actuals .....	10
Hawai'i Convention Center Fiscal Year 2017 Actuals .....	10
<b>Goal 1: Improve the Integrity of the Destination .....</b>	<b>11</b>
Hawaiian Culture .....	12-13
Kāhea: Harbor Greetings .....	13
Natural Resources .....	14-15
Product Development .....	16-17
<b>Goal 2: Ensure Stable Economic Benefits .....</b>	<b>18</b>
Brand Management Plan/Major Market Management .....	19
O'ahu .....	20
Maui County .....	21
Kaua'i .....	22
Island of Hawai'i .....	23
United States .....	24
Japan .....	25
Canada .....	26
Oceania .....	27
Korea .....	28
China .....	29
Taiwan .....	30
Hong Kong .....	30
Southeast Asia .....	31
Europe .....	31
Business Destination Management .....	32
2017-18 Events Listing .....	33-34
Online/Website Projects .....	35
<b>Goal 3: Elevate Hawai'i's Value Perception .....</b>	<b>36</b>
Native Hawaiian Festivals .....	37
Major Festivals and Signature Events .....	38
Sports Marketing .....	39
Brand Development Projects .....	40
Access (Air and Cruise) .....	41
Career Development .....	42
Safety and Security .....	43
Tourism Research and Planning .....	44
<b>Goal 4: Strengthen HTA's Reputation .....</b>	<b>45</b>
Communications .....	46
Global Tourism Summit .....	47-49
Hawai'i Visitor Statistics .....	50-53
Statewide and By Island .....	50-51
Global Source Markets .....	52-53
Brand Experience Program Listings .....	54-55
Program/Project Contract Listing .....	56
The HTA Team Supporting Hawai'i's Tourism Industry .....	57



Aloha kākou,

We began 2017 hopeful Hawai'i's tourism industry could replicate the success of 2016, which saw the highest totals ever recorded for visitor spending (\$15.91 billion), generated state tax revenue (\$1.86 billion) and visitor arrivals (8.93 million).

Another measure of success vital to the state's economic health and families throughout the Hawaiian Islands were the 194,000 jobs supported by tourism in 2016, also the highest total ever.

Entering 2017, economists projected Hawai'i's visitor spending and arrivals would increase incrementally at best, but that growth could also flatten.

In light of these predictions, we urged our Global Marketing Team to aggressively and creatively reaffirm the appeal of Hawai'i's brand to potential travelers. Our view is that Hawai'i must always strive to strengthen our share of the global travel market.

Fortunately, Hawai'i tourism exceeded all expectations in 2017. The state realized its sixth straight year of record-high totals for visitor spending, generated state tax revenue and arrivals. This is welcome news to families statewide who depend on tourism for their livelihoods.

Hawai'i travel demand from our largest source markets – the U.S. mainland, Japan and Canada – have driven tourism's success in 2017. Travel from both the U.S. West and U.S. East markets has been robust, while Japan and Canada rebounded strongly after being down in recent years.

Air service to Hawai'i from markets on both sides of the Pacific is at its highest and poised to grow even more as we enter 2018, with the introduction of new flights from Delta Air Lines, Virgin America, United Airlines and Scoot in December.

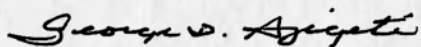
A major benefit to Hawai'i travel this past year was reopening the Ellison Onizuka Kona International Airport at Keāhole as a second international port of entry for carriers. This has proven to be an economic boon to the island of Hawai'i and the state overall, fueled by the introduction of nonstop flights between Tokyo and Kona by Hawaiian Airlines and Japan Airlines.

While Hawai'i is fortunate tourism is thriving, we recognize the concerns community members have about its effect on the state's quality of life. Responsible tourism is key to Hawai'i's tourism future, but is a subject requiring all stakeholders – the public sector, private businesses and residents – to collaborate on solutions that are realistic, fair and do not unduly hinder our state's leading industry.

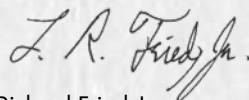
Thus, encouraging a balanced and holistic approach to managing tourism is a primary objective of the Hawai'i Tourism Authority. It was the focus of our successful Global Tourism Summit in September, and the motivation for HTA awarding \$3.3 million to 128 nonprofits this past year to help preserve Hawaiian culture, protect Hawai'i's natural resources and share community traditions.

We are grateful for your support of Hawai'i's tourism industry and, consequently, the businesses and families statewide who rely on its success.

With warmest aloha,



George D. Szigeti  
HTA President and CEO



L. Richard Fried Jr.  
HTA Board Chair





## **HAWAI'I TOURISM AUTHORITY BOARD OF DIRECTORS**

**L. Richard Fried Jr., Chair**

*Founding Partner,*

Cronin, Fried, Sekiya, Kekina and Fairbanks,  
Attorneys At Law  
City and County of Honolulu

**Craig G. Nakamura, Vice Chair**

*Partner, Carlsmith Ball LLP*

County of Maui

**Fred Atkins**

*Managing Partner, Kaua'i Kilohana Partners*

County of Kaua'i

**Sean P. Dee**

*Executive Vice President, Chief Marketing Officer,*

Outrigger Enterprises Group  
At-Large

**Gerald De Mello**

*Professor Emeritus, Hawai'i Community College*

County of Hawai'i

**Donna Domingo**

*President, ILWU Local 142*

At-Large

**George Kam**

*Ambassador of Aloha*

At-Large

**Ku'uipo Kumukahi**

*Hawaiian Culture Manager,*

Hyatt Regency Waikiki Beach Resort and Spa  
At-Large

**Sherry Menor-McNamara**

*President and CEO, Chamber of Commerce Hawaii*

At-Large

**Kelly Sanders**

*Area Managing Director,*

Marriott Hotels and Resorts Waikiki  
At-Large

**Denise Hayashi Yamaguchi**

*President and CEO, Denise Hayashi Consulting LLC*

At-Large





# 2017: IMPROVING TOURISM FOR HAWAII'S FUTURE



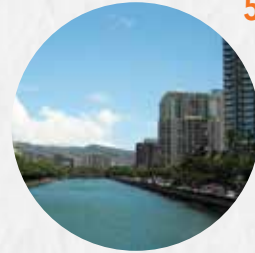
**FEB 11-12** The U.S. plays Germany at Maui's Royal Lahaina Resort in a Fed Cup women's tennis match brought to Hawaii'i by HTA. It marks the first time the same state hosts Fed Cup matches in consecutive years.

**FEB 18-20** The Hawaii'i Convention Center debuts its new sports courts, hosting a women's volleyball tournament with teams from the U.S. mainland and Hawaii'i.



**MARCH-APRIL** Stakeholder meetings with cultural advisors are convened statewide to discuss the perpetuation of Hawaiian culture.

**JUNE 5** HTA contributes \$250,000 to restore the Ala Wai watershed in support of Māmala Bay and Waikīkī.



**FEB 27** HTA awards \$3.3 million to support 128 nonprofit groups perpetuating Hawaiian culture, protecting Hawaii'i's natural resources and sharing community events in 2017.



**APRIL 19** HTA collaborates with the State Department of Health to advise the public on preventing rat lungworm disease.



**JUNE 17** Hōkūle'a and its crew are welcomed home with a joyous celebration upon completing their three-year Mālama Honua Worldwide Voyage.

## Jan >>>>> Feb >>>>> March >>>>> April >>>>> May >>>>> June >>>>>

**JAN 4** The NBA's Los Angeles Clippers and HTA team up for Hawaii'i Night at the STAPLES Center in Los Angeles to promote travel to the Hawaiian Islands.



**MARCH 6** ANA selects a honu-inspired design for its Airbus A380 aircraft set to begin service to Honolulu in spring 2019.



**MARCH 9** HTA issues two research studies assessing the impact of alternative accommodations in Hawaii'i.



**MAY 17** The Hawaii'i Green Business Award is presented to HTA for being energy efficient and reducing waste with its 2016 Hawaii'i Tourism Conference.

**JUNE 20-22** HTA is the premier sponsor of the VERGE Hawaii'i 2017 Asia Pacific Clean Energy Summit, with a major focus on responsible tourism.



**JAN 30** HTA releases Hawaii'i's 2016 visitor statistics with final totals showing record highs in visitor spending (\$15.91 billion), generated state tax revenue (\$1.86 billion) and visitor arrivals (8.93 million).



**MARCH 16** Four research studies on the profiles, preferences and sentiments of LGBT travelers from the U.S., Canada, China and Australia, relating to Hawaii'i are issued by HTA.



**MAY 19** HTA welcomes Sherry Menor-McNamara, president and CEO of the Chamber of Commerce Hawaii, and Kelly Sanders, area managing director of Marriott Hotels and Resorts Waikiki, to its board of directors.



**JUNE 28** AirAsia X, Southeast Asia's first low-cost carrier serving Hawaii'i, launches four weekly flights between Malaysia and Honolulu, with a stopover in Osaka, Japan.





The past year was filled with achievements, special events and notable announcements that helped strengthen tourism and promised that Hawai'i's leading industry will continue to improve for the benefit of residents, communities and businesses statewide.

Below are some highlights from 2017.



**AUG 17** HTA introduces the revamped GoHawaii.com website, offering users mobile-friendly, immersive, multimedia content experiences, and featuring Hawaiian language, chants, art and music.



**OCT 10** HTA awards \$3.5 million to support 124 nonprofit groups perpetuating Hawaiian culture, protecting Hawai'i's natural resources and sharing community events in 2018.

**OCT 11** Southwest Airlines announces its intention to offer flights between the U.S. mainland and Hawai'i, with ticket sales expected to begin in 2018.

**DEC 14** Virgin America launches daily nonstop flights between San Francisco and Kona.

**DEC 19** Scoot launches service between Singapore and Honolulu, offering four weekly flights, which include a stopover in Osaka, Japan.

**DEC 20** United Airlines expands its seat capacity to Hawai'i by 20 percent, adding more nonstop flights to the neighbor islands from Los Angeles, San Francisco, Chicago and Denver.

**DEC 21** Delta Airlines launches daily nonstop flights between Seattle and Lihue.

July >>> Aug >>>> Sep >>>>> Oct >>>>>> Nov >>>>>> Dec



**SEP 9** The Native Hawaiian Hospitality Association marks its 20th anniversary as the lead advocate for Hawaiian culture in the tourism industry.

**NOV 20** HTA appoints Jennifer Chun director of its Tourism Research Division.



**SEP 15** Japan Airlines relaunches nonstop daily flights between Tokyo and Kona on the island of Hawai'i after a seven-year absence.



**NOV 28** HTA's Tourism Research Division begins publishing the monthly *Hawai'i Hotel Performance Report*, providing key statistics and analysis for hotel stays statewide and by island county.



**SEP 19-21** HTA presents the Global Tourism Summit with a focus on responsible tourism. More than 1,800 participants from 18 countries attend, with support from 49 sponsors.



**SEP 25** The Los Angeles Clippers begin their training camp in Honolulu, culminating in two preseason games against the Toronto Raptors on October 1 and 3. The Clippers also donate a new computer lab to the students of Stevenson Middle School in Honolulu.



# OVERVIEW OF THE HAWAI'I TOURISM AUTHORITY

The Hawai'i Tourism Authority was established in 1998 through a legislative act to serve as the state's lead agency supporting tourism, Hawai'i's largest industry.

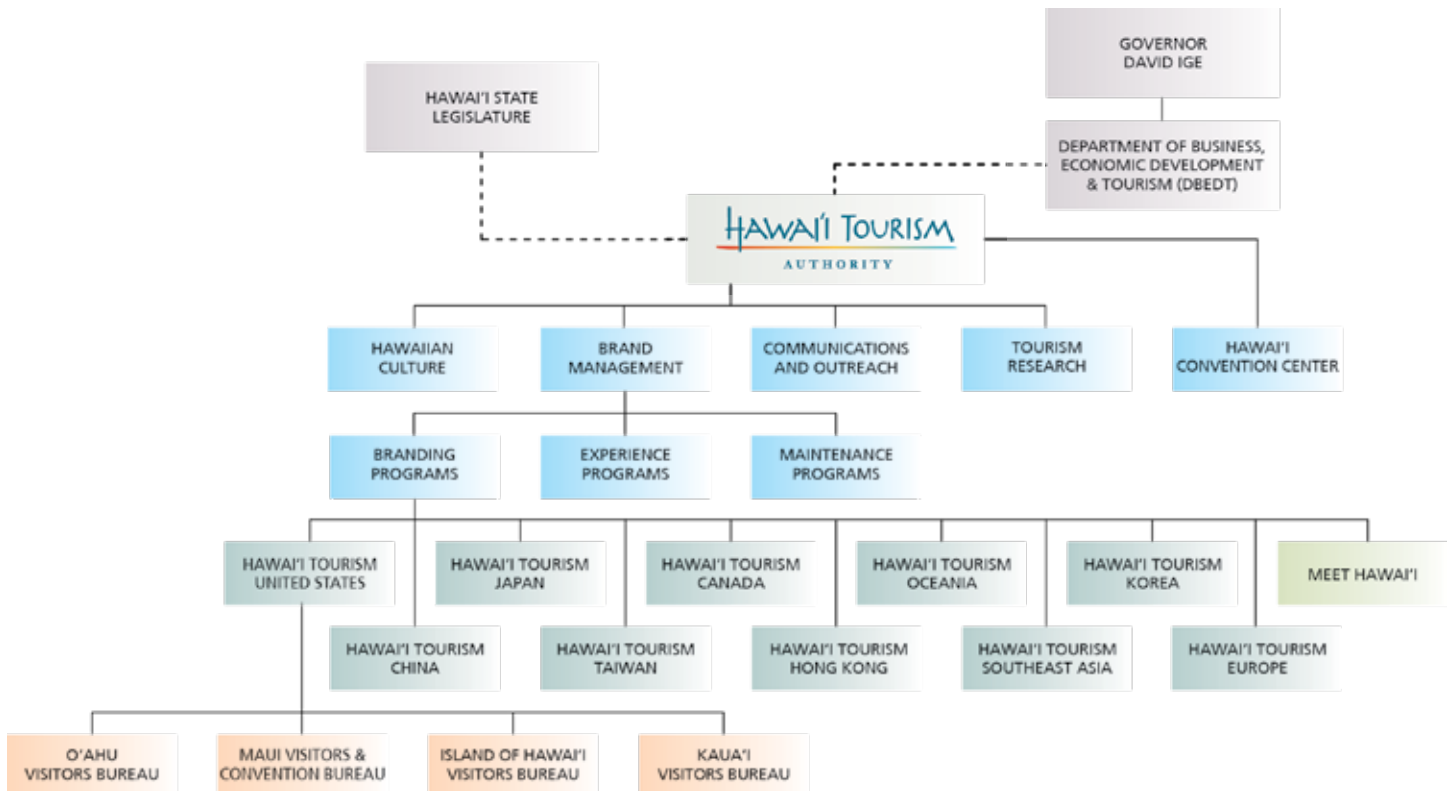
This same act also established the Tourism Special Fund, which utilizes a set percentage of Transient Accommodations Tax (TAT) collections assessed on hotels, vacation rentals and other accommodations to fund HTA's marketing initiatives in support of Hawai'i's tourism industry.

Among its responsibilities, HTA is charged with:

- Meeting the goals of its Five-Year Strategic Plan covering the years 2016 through 2020.
- Setting tourism policy and direction from a statewide perspective.
- Developing and overseeing implementation of the state's tourism marketing plans and programs.
- Supporting programs and initiatives perpetuating the Hawaiian culture, protecting Hawai'i's natural resources, and presenting community festivals and events statewide.
- Managing programs and activities to sustain a healthy tourism economy for the state.
- Coordinating tourism-related research, planning and promotional outreach activities with stakeholders in the public and private sectors.
- Encouraging distribution of visitors throughout the Hawaiian Islands to achieve an improved balance of capacity statewide.
- 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 HTA's board of directors and is responsible for assisting the board in its responsibility to fulfill the mandates of Chapter 201B of the Hawai'i Revised Statutes.





## MEASURES OF SUCCESS

The Hawai'i Tourism Authority Five-Year Strategic Plan, covering the years 2016 to 2020, serves as the guide for achieving short- and long-term goals of success based on research data, market intelligence, input from stakeholders and collaboration with industry associations. The following targets are proposed as a benchmark to measure HTA's success in realizing the goals of the strategic plan.

GOAL	MEASURE OF SUCCESS	RECENT VALUE(S)	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% 2017: 63%	75%	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: \$11.82B 2006: \$12.13B 2007: \$11.90B 2008: \$10.86B 2009: \$8.90B 2010: \$9.57B 2011: \$10.24B 2012: \$11.86B 2013: \$11.86B 2014: \$11.94B 2015: \$11.80B 2016: \$12.15B	\$12.75B	\$13.28B
Elevate Hawai'i's Value Perception	Percentage of potential visitors considering a trip to Hawai'i  <i>Source: HTA Marketing Effectiveness Study</i>	<b>LATE 2017</b> U.S. West: 50% U.S. East: 30% Canada: 44% Japan: 41%	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 + 10% of the difference between baseline and 100%  <i>(Example: If baseline is 50%, target is 55%)</i>	Baseline + 25% of the difference between baseline and 100%  <i>(Example: If baseline is 50%, target is 62.5%)</i>



## TRANSIENT ACCOMMODATIONS TAX COLLECTIONS

The collection of the Transient Accommodations Tax (TAT) and distribution of its revenues help strengthen the state's economy while also supporting public services provided by the four island counties that enhance the quality of life for residents statewide.

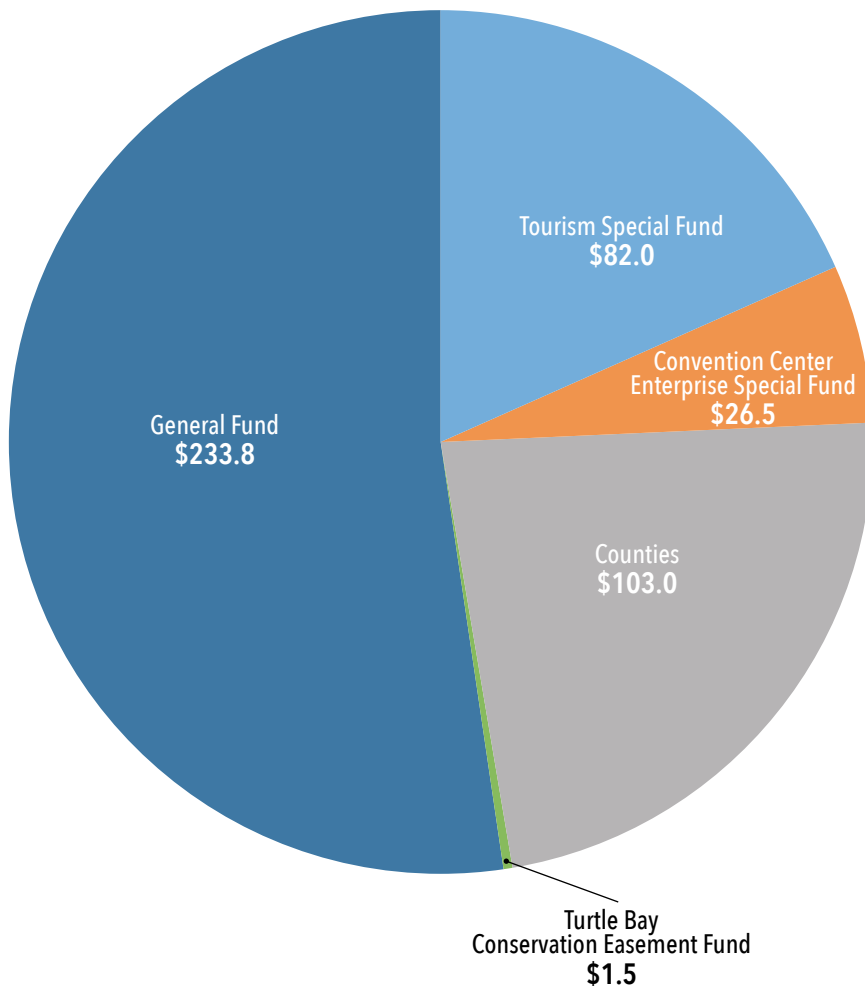
The TAT revenues are utilized by the City and County of Honolulu, Maui County, County of Hawai'i and County of Kaua'i for essential purposes, including public education, public safety, infrastructure improvements and maintenance of park facilities.

In fiscal year (FY) 2017, TAT collections totaled \$508.4 million, an increase of 13.8 percent compared to the \$446.8 million collected in FY 2016. The state's General Fund received \$292.4 million in TAT revenues in FY 2017.

The allocation of TAT revenues to the Tourism Special Fund and Convention Center Enterprise Special Fund was \$82 million and \$26.5 million, respectively, in FY 2017.

A total of \$103 million in TAT revenues was allocated to be shared by the four island counties. In addition, \$3 million was distributed to the Hawai'i State Department of Land and Natural Resources, and \$1.5 million to the Turtle Bay Conservation Easement Special Fund.

FY 2016 TAT DISTRIBUTION (\$ MIL.)



FY 2017





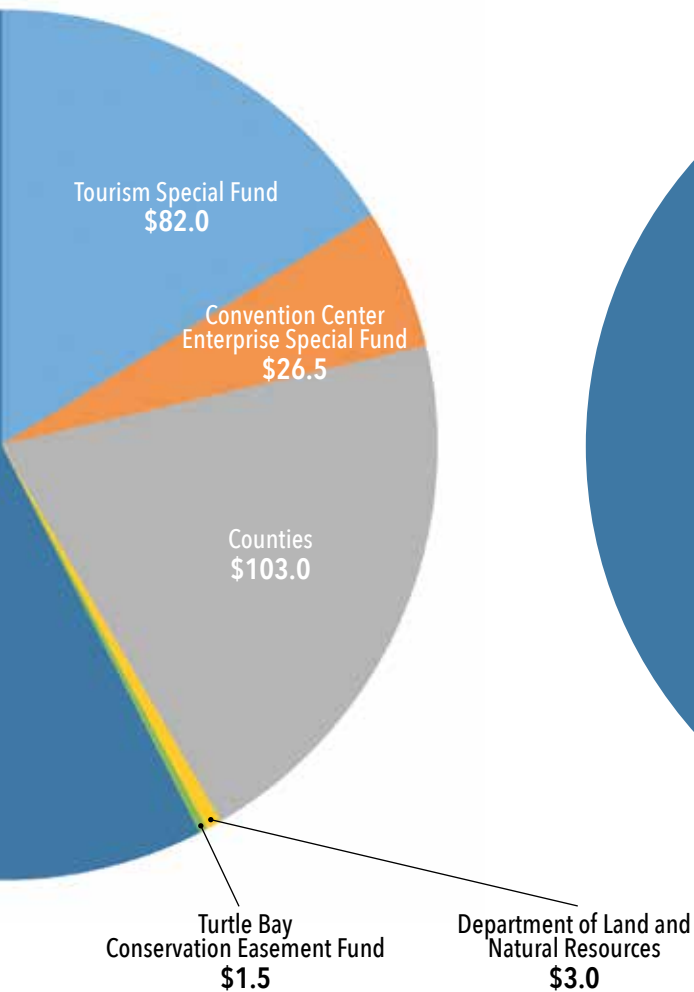
## TRANSIENT ACCOMMODATIONS TAX (\$ MIL.)

	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017	PROJECTED FY 2018
<b>City and County of Honolulu</b>	41.0	41.0	45.4	45.4	45.4	45.4
<b>Maui County</b>	21.2	21.2	23.4	23.4	23.4	23.4
<b>County of Hawai'i</b>	17.3	17.3	19.2	19.2	19.2	19.2
<b>County of Kaua'i</b>	13.5	13.5	14.9	14.9	14.9	14.9

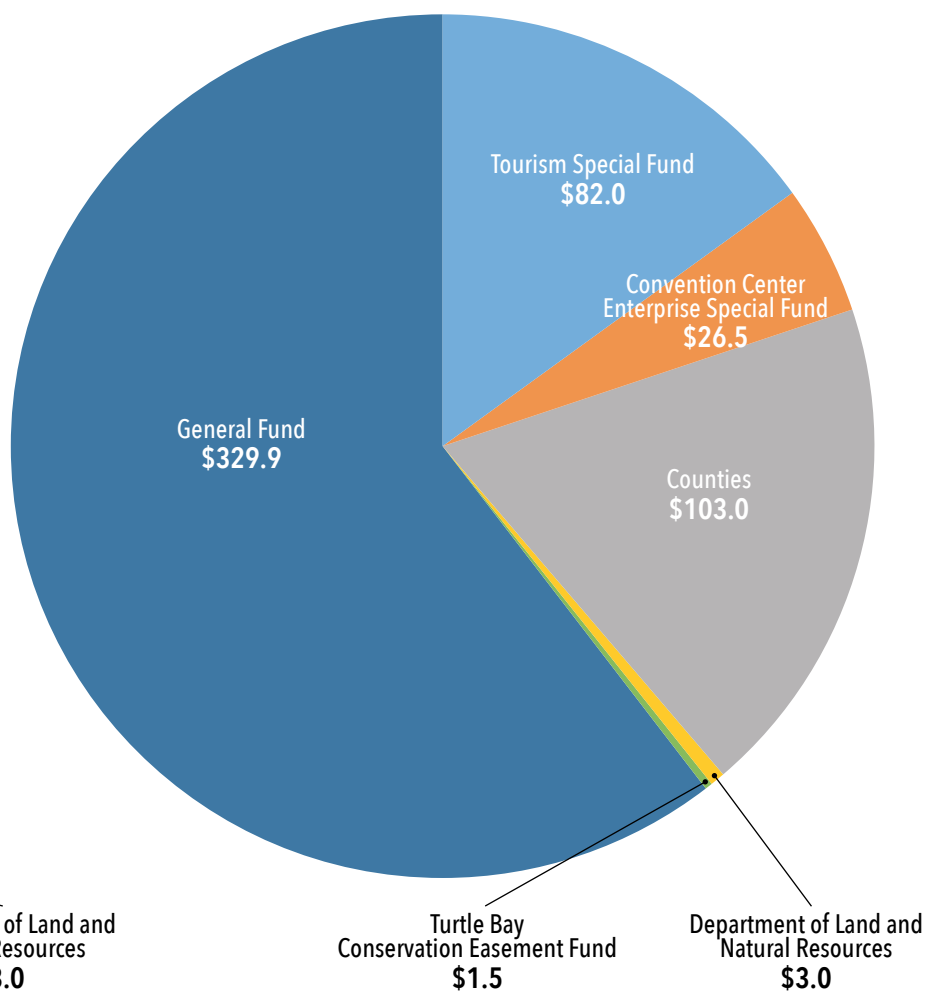
## PERCENTAGE OF TAT REVENUES DISTRIBUTED BY COUNTY

CITY AND COUNTY OF HONOLULU	MAUI COUNTY	COUNTY OF HAWAI'I	COUNTY OF KAUA'I
44.1%	22.8%	18.6%	14.5%

**TAT DISTRIBUTION (\$ MIL.)**



**FY 2018 PROJECTED TAT DISTRIBUTION (\$ MIL.)**





## HAWAI'I TOURISM AUTHORITY (HTA)

Fiscal Year (FY) 2017 Actuals (\$000)

### REVENUES

TAT Deposits – Tourism Special Fund	\$ 82,000
Investment Pool Interest/Miscellaneous Receipts	195
TOTAL REVENUES	\$ 82,195

### APPROPRIATIONS

FY 2017	\$ 87,298
TOTAL APPROPRIATIONS	\$ 87,298

### HTA EXPENDITURES\*

Maintaining Brand	\$ 4,642
Brand Experience	8,425
Brand Management	59,500
Communications	649
Tourism Research	2,046
Governance	3,679
TOTAL HTA EXPENDITURES	\$ 78,941

\* Hawaiian culture is intertwined throughout all areas of HTA activity.

## HAWAI'I CONVENTION CENTER (HCC)

Fiscal Year (FY) 2017 Actuals (\$000)

### REVENUES

TAT Deposits – Convention Center Enterprise Special Fund	\$ 26,500
Convention Center Operations	10,288
Transfer from Tourism Special Fund for Convention Center	
Sales and Marketing	5,069
Investment Pool Interest/Miscellaneous Receipts	68
TOTAL REVENUES	\$ 41,925

### APPROPRIATIONS

FY 2017	\$ 54,029
TOTAL APPROPRIATIONS	\$ 54,029

### HCC EXPENDITURES

Convention Center Facility Operations:	
Operator Costs	\$ 10,721
Governance (includes convention center insurance)	583
Convention Center Sales and Marketing	5,069
Convention Center Repair and Maintenance	5,100
Total Expenditures Prior to Payments on Obligation to	
State Department of Budget and Finance	\$ 21,473
Payments on Obligation to State Department of Budget and Finance	\$ 20,000
TOTAL HCC EXPENDITURES	\$ 41,473



## IMPROVE THE INTEGRITY OF THE DESTINATION

Ho'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.



## HAWAIIAN CULTURE

Native Hawaiian culture is the heart of our Islands and the root of HTA's mission in marketing Hawai'i. The spirit and significance of the Native Hawaiian culture is integrated into every element of HTA's programs to support Hawai'i and its people.

There continues to be a renaissance in Hawaiian language usage and practitioners of Native Hawaiian culture within the tourism industry. HTA is committed to supporting programs perpetuating the integrity of the Native Hawaiian culture through unique and genuine visitor experiences that differentiate Hawai'i from other destinations worldwide.

### 2017 HIGHLIGHTS

- Provided \$1.3 million in funding through the Kūkulu Ola Program to support 31 community projects statewide perpetuating Hawaiian culture. HTA also increased total funding of the program by \$24,000 for the year and brought management of the projects in-house to enhance relationships with awardees.
- Honored the Polynesian Voyaging Society and Mālama Honua Worldwide Voyage at the Global Tourism Summit's Tourism Legacy Awards Luncheon for sharing their message of aloha, preserving native cultures, and protecting natural resources with people in more than 150 ports in 23 countries and territories during voyaging canoe Hōkūle'a's three-year, around-the-world expedition.
- Expanded HTA's longstanding relationship with the Native Hawaiian Hospitality Association to strengthen the bridge between the Hawaiian community and tourism industry through training, education and outreach.
- Executed a partnership with Hawai'i Investment Ready to facilitate and enhance the capacity of 12 Hawai'i-based social enterprises in the tourism sector.
- Conducted Ma'ema'e Program training in international markets to foster a deeper appreciation of Hawai'i's rich heritage and history.
- Supported the authentic display of Native Hawaiian culture, arts and entertainment in various trade shows and sales missions worldwide through practitioners, performers and trainers from all islands.
- Continued to integrate 'ōlelo Hawai'i (Hawaiian language) into HTA's daily business to support its status as an official state language. HTA's monthly board meeting agenda is posted in both Hawaiian and English.

### 2018 FOCUS

- Conduct focus group meetings statewide with cultural stakeholders to assess the needs of the Hawaiian community as it pertains to tourism and HTA's focus on Hawaiian culture programs.
- Continue to improve the implementation of events highlighting Native Hawaiian heritage and develop a more refined marketing plan for cultural festivals statewide.
- Increase dialogue with Hawaiian cultural practitioners and seek their input on how HTA and the tourism industry can advance the goal of improving the integrity of the destination.







## KĀHEA: HARBOR GREETINGS

HTA partnered with the Kaua'i Office of Economic Development, Lahaina Town Action Committee, Destination Hilo and Destination Kona Coast to implement the Kāheha cruise ship greeting program at Hawai'i harbors. The Kāheha program showcases Hawai'i's Aloha Spirit, and contributes to ensuring a positive first and last impression of the Islands for cruise visitors.

### 2017 HIGHLIGHTS

- Continued activities greeting cruise ship visitors at Nāwiliwili, Lahaina, Hilo and Kona harbors, including Hawaiian entertainment and cultural demonstrations.

### 2018 FOCUS

- Expanding the Kāheha program to Honolulu Harbor, Hawai'i's most visited port of entry.



## NATURAL RESOURCES

The natural resources found throughout the Hawaiian Islands 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. 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.

### 2017 HIGHLIGHTS

- Provided \$1.2 million in funding through the Aloha 'Āina Program to support 30 community projects statewide in their efforts to protect and preserve Hawai'i's natural environment. HTA also increased total funding of the program by \$185,000 for the year and brought management of the projects in-house to enhance its relationships with awardees.
- Established a partnership with the State Department of Land and Natural Resources (DLNR) to continue inter-departmental collaboration focused on educating visitors and residents about the importance of protecting Hawai'i's natural resources. Public outreach included sponsoring television specials, creating environmental guide map displays, and showing videos in hotel rooms and on airlines with advice on how to best preserve Hawai'i's resources for future generations.
- Funded the Ala Wai Watershed Collaborative to support the planning and implementation of a regional plan and financing mechanism to improve the health of the watershed flowing into Waikīkī and Māmala Bay.
- Funded and improved the implementation of the Hawai'i Ecotourism Association's Sustainable Tourism Certification Program to recognize tour and activity operators statewide committed to supporting the ideals of protecting the environment. Through September, 49 operators statewide collectively sharing environmentally conscious tour and activity experiences with more than 2.3 million guests had been certified.

### 2018 FOCUS

- Enhance HTA's partnership with DLNR to provide insight on specific areas needing attention, and amplify messaging about safety while visiting Hawai'i and being a responsible visitor.
- Continue supporting the Hawai'i Ecotourism Association in certifying tour operators committed to sustainability and integrating their activities into HTA's global marketing efforts.
- Implement a program to assist with the protection and management of cultural and natural resource sites by recognizing them with state, national or world heritage designations.









## PRODUCT DEVELOPMENT

HTA is dedicated to supporting the establishment of distinct and memorable experiences in communities statewide for residents and visitors to enjoy. To fulfill this initiative, HTA assists industry partners and community stakeholders in developing new products and cultivating existing programs to enhance Hawai'i's brand and convey the range of unique festivals and events offered on all islands.

HTA's product development efforts are steered by its Guiding Principles: *Inspired by Hawai'i's natural environment, world-renowned hospitality and Aloha Spirit, the HTA honors and perpetuates the Native Hawaiian and multicultural traditions that support Hawai'i's island communities. HTA continues to invest in Hawai'i's people, places and culture to ensure the Hawaiian Islands remain a uniquely special place to live, work and visit.*

### 2017 HIGHLIGHTS

- Provided more than \$3.3 million in funding to support 128 community-based projects to perpetuate Hawaiian culture, preserve natural resources, and share community festivals and events through HTA's Kūkulu Ola, Aloha 'Āina and Community Enrichment programs.
- Provided sponsorship support to 31 sports events statewide, an increase of four events over 2016.
- Enhanced visitor enjoyment of the Hawaiian Islands by supporting festivals and events showcasing the range of unique experiences available statewide, including multicultural celebrations, environmental beauty, culinary offerings, community traditions and sports.
- Provided support to elevate public awareness and build attendance at HTA-sponsored festivals and events through workshops, marketing and communications outreach by HTA's Global Marketing Team.

### 2018 FOCUS

- Continuing to follow the direction of HTA's Five-Year Strategic Plan (2016-20) and Guiding Principles by bolstering the Hawai'i visitor experience through marketing and implementing of resources in support of tourism industry partners and community stakeholders.
- Continuing to improve the quality of existing festivals and events, while also encouraging the development of new products and experiences that enhance the allure of the Hawaiian Islands.
- Encouraging collaboration among tourism industry partners to develop new products, events, programs and experiences for travelers to enjoy in the Hawaiian Islands.











**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 PLAN

The Brand Management Plan outlines the objectives, strategies, actions and evaluation approach that HTA will undertake to achieve the goals within its Five-Year Strategic Plan.

This Brand Management Plan frames HTA's efforts for 2017 to:

- Address the needs of Hawai'i's tourism industry.
- Improve the continuity and flow of business.
- Maintain the momentum of Hawai'i's top economic engine.

Initially, Hawai'i Revised Statutes Section HRS 201B-6 required HTA to prepare a tourism marketing plan as a single comprehensive document, including in the plan its brand management efforts, target 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, which called for replacing "marketing and promotion" with "brand management" where appropriate. As a result, HTA prepares an annual Brand Management Plan, which includes detailed execution plans for brand marketing – including the individual brand management plans by major market area – as well as execution plans for HTA's brand experience, communications and research programs. It also presents an operational plan that organizes HTA for success.

HTA's programs in the Brand Management Plan are aligned under the following areas:

- 1) Awareness, conviction and access
- 2) Unique and memorable experiences
- 3) Knowledge and collaboration
- 4) Strategic oversight and governance

This structure enhances the efficiencies of HTA's management, creates stronger emphasis on the core areas by grouping related programs, ensures that communications and tourism research are incorporated into all program areas, and integrates Hawaiian culture into all HTA initiatives.



## MAJOR MARKET MANAGEMENT

Hawai'i's tourism industry continued to drive the state's economic success in 2017, with record high totals for visitor spending, generated tax revenue and visitor arrivals for a sixth straight year.

HTA's Major Market Management program promotes travel demand for the Hawaiian Islands through collaborations with industry partners statewide and in key global markets. HTA's primary objective is to maintain tourism's growth on a positive trajectory to ensure economic stability for the state and support an industry that is the leading provider of jobs for Hawai'i residents.

Travel to the Hawaiian Islands in 2017 was promoted in 10 major market areas by HTA's Global Marketing Team, comprised of Hawai'i Tourism United States, Hawai'i Tourism Japan, Hawai'i Tourism Canada, Hawai'i Tourism Oceania (Australia and New Zealand), Hawai'i Tourism Korea, Hawai'i Tourism China, Hawai'i Tourism Taiwan, Hawai'i Tourism Hong Kong, Hawai'i Tourism Southeast Asia (Malaysia, Singapore, Indonesia and Thailand) and Hawai'i Tourism Europe (United Kingdom, Germany, Switzerland, France and Italy).

HTA's Global Marketing Team is charged with developing strategic programs to promote travel to the Hawaiian Islands in their respective markets. These programs encompass public relations, advertising, promotions, travel trade, MCI (meetings, conventions and incentives) marketing, education and training, stakeholder communications, and industry partner relations.



# O'AHU

O'ahu attracts significantly more visitors than any of the other islands of Hawai'i. Through September, O'ahu drew 4,264,304 visitors, a 4.2 percent same-period increase over 2016. The island's visitor count comprised 61 percent of Hawai'i's total 7,017,268 visitors during the same period.

The bulk of O'ahu's visitors came from three markets, with travelers from the U.S. West comprising 28.8 percent, Japan 26.4 percent and the U.S. East 20.8 percent of total visitors to the island. O'ahu's next four largest visitor source markets were Australia at 5.5 percent, Korea at 4.1 percent, Canada at 3.7 percent and China at 2.8 percent.

Visitor spending on O'ahu through September was \$5.73 billion, a 5.9 percent increase over the same period in 2016, supported by a 2 percent increase in average daily spending to more than \$198 per visitor.



## AIR ACCESS

Total trans-Pacific air seats provided by carriers serving O'ahu from 46 domestic and international markets was 6,090,900 seats through September, similar to the same period in 2016. O'ahu's air seats represented 66 percent of total air seats serving the state.

Of the total air seats serving O'ahu through September, 3,475,491 seats were from domestic markets (down 1.2 percent from the same period in 2016), with 2,615,409 seats from international markets (up 1.3 percent).

Air service to O'ahu in 2017 benefited from Hawaiian Airlines adding four weekly flights between Tokyo, Japan, and Honolulu in December 2016, and the launch of four weekly flights from AirAsia X between Kuala Lumpur, Malaysia, and Honolulu, including a stopover in Osaka, Japan, in June.

In addition, air carrier Scoot launched four weekly flights between Singapore and Honolulu, including a stopover in Osaka, in December.

## COMMUNITY SUPPORT

HTA supported 35 nonprofit organizations on O'ahu committed to perpetuating Hawaiian culture, preserving natural resources and celebrating community traditions. Funding was provided to 11 Kūkulu Ola Program recipients, 10 Aloha 'Āina Program recipients and 14 Community Enrichment Program recipients.

O'AHU	2016		2017		STATEWIDE 2016		STATEWIDE 2017	
	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT
Community Enrichment Program	27	\$310,000	14	\$203,331	-	-	2	\$107,000
Signature Incubator Program	-	-	3	\$80,000	-	-	2	\$70,000
Kūkulu Ola	15	\$529,252	11	\$485,039	6	\$256,268	2	\$140,000
Major Festivals	4	\$468,000	3	\$401,000	1	\$300,000	1	\$300,000
Native Hawaiian Festivals	2	\$150,000	2	\$105,000	3	\$600,000	3	\$520,000
Aloha 'Āina	7	\$167,000	10	\$286,000	-	-	2	\$167,963
Safety and Security	1	\$288,000	1	\$318,000	4	\$150,000	3	\$271,000
Sports Events	13*	\$7,010,000†	11	\$2,537,000	1**	\$132,000	3	\$65,000
Other Brand Experience Programs	4	\$666,000	1	\$100,000	2	\$810,000	-	-
Career Development	-	-	-	-	3	\$325,000	3	\$226,000
Visitor Bureau Funding and Other Direct Investments		\$3,503,167		\$3,437,345	-	-	-	-
<b>TOTAL HTA PROGRAM FUNDING</b>		<b>\$13,091,419</b>		<b>\$7,952,715</b>		<b>\$2,573,268</b>		<b>\$1,866,963</b>

\* Does not include Honolulu Marathon \*\* Oahu and Maui only † Includes a \$5 million fee to support hosting the NFL Pro Bowl

## MAUI COUNTY

Through September, Maui reported growth in both visitor spending and arrivals. At \$3.55 billion, visitor spending was up 3.8 percent from the same period in 2016, with visitor arrivals up 3.2 percent to 2,055,771.

Moloka'i achieved a 10.8 percent increase in visitor spending over the same period to \$24.9 million despite a decrease in visitor arrivals, down 4.9 percent to 42,726.

Lāna'i experienced a same period 6.7 percent decrease in visitor spending to \$58.4 million while recording a small increase in visitor arrivals, up 1.4 percent to 47,815.

Maui drew 77.6 percent of its total visitor count from the U.S. mainland, with nearly half coming from the U.S. West market (49.4 percent) and the remainder from the U.S. East market (28.2 percent). Canada contributed 8.9 percent of Maui's visitors, with Australia and Europe producing 2.2 percent each, and Japan 2.1 percent.

### AIR ACCESS

Through September, total trans-Pacific air seats serving Maui was 1,756,157 seats (down 0.7 percent from the same period in 2016), with 91 percent of these from the U.S. mainland (down 0.3 percent to 1,606,502) and the rest from Canada (down 4.7 percent to 149,655).

Maui's air service in 2017 included nonstop flights from Anchorage, Alaska; Seattle and Bellingham, Washington; Calgary and Edmonton, Alberta, and Vancouver, British Columbia, Canada; Chicago, Illinois; Dallas, Texas; Denver, Colorado; Los Angeles, San Diego, San Jose, Sacramento, San Francisco and Oakland, California; Phoenix, Arizona; Portland, Oregon; and Salt Lake City, Utah.

In December, United Airlines expanded its Maui air service, adding more nonstop flights year-round from Chicago, Denver, Los Angeles and San Francisco.

### COMMUNITY SUPPORT

HTA supported 38 nonprofit organizations in Maui County committed to perpetuating Hawaiian culture, preserving natural resources and celebrating community traditions. Funding was provided to nine Kūkulu Ola Program recipients, nine Aloha 'Āina Program recipients and 20 Community Enrichment Program recipients.



MAUI COUNTY	2016		2017		STATEWIDE 2016		STATEWIDE 2017	
	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT
Community Enrichment Program	22	\$324,000	20	\$259,000	-	-	2	\$107,000
Signature Incubator Program	-	-	1	\$35,000	-	-	2	\$70,000
Kūkulu Ola	7	\$189,480	9	\$234,326	6	\$256,268	2	\$140,000
Major Festivals	1	\$105,000	1	\$75,000	1	\$300,000	1	\$300,000
Native Hawaiian Festivals	-	-	-	-	3	\$600,000	3	\$520,000
Aloha 'Āina	12	\$323,500	9	\$354,604	-	-	2	\$167,963
Safety and Security	1	\$46,000	1	\$46,000	4	\$150,000	3	\$271,000
Sports Events	4	\$625,000	6	\$770,000	1*	\$132,000	3	\$65,000
Other Brand Experience Programs	2	\$40,000	2	\$38,000	2	\$810,000	-	-
Career Development	-	-	-	-	3	\$325,000	3	\$226,000
Visitor Bureau Funding and Other Direct Investments		\$3,088,379		\$3,039,372	-	-	-	-
Moloka'i Visitors Association		\$278,177		\$148,844	-	-	-	-
Destination Lāna'i		\$163,544		\$155,774	-	-	-	-
<b>TOTAL HTA PROGRAM FUNDING</b>		<b>\$5,183,080</b>		<b>\$5,155,920</b>		<b>\$2,573,268</b>		<b>\$1,866,963</b>

\* Oahu and Maui only



## KAUA'I

Kaua'i maintained strong and steady growth in visitor spending through September, supported by increases in visitor arrivals and average daily spending. Visitor spending was \$1.39 billion, up 10.1 percent over the same period in 2016, with visitor arrivals up 7.3 percent to 963,752 and average daily spending up 4.7 percent to \$193 per visitor.

Through September, 82 percent of Kaua'i's total visitor arrivals were from the U.S. mainland, the highest percentage of all islands statewide. Additionally, Kaua'i attracted the highest per island percentage of travelers from both the U.S. West and U.S. East markets at 51.1 percent and 30.9 percent of total arrivals, respectively.

Arrivals from Canada in the same period accounted for 5.4 percent of Kaua'i's total visitors, followed by Europe at 2.7 percent, Australia at 2.5 percent and Japan at 1.9 percent.



### AIR ACCESS

Total trans-Pacific air seats serving Kaua'i was 558,158 seats through September, up 3.1 percent from the same period in 2016, with the vast majority of these seats coming from U.S. mainland markets (up 3.3 percent to 538,166) and the remaining balance from Canada (down 1.7 percent to 19,992).

Kaua'i's air service in 2017 included nonstop flights from Dallas, Texas; Denver, Colorado; Los Angeles, San Jose, San Diego, San Francisco and Oakland, California; Phoenix, Arizona; Portland, Oregon; Seattle, Washington; and Vancouver, British Columbia, Canada.

In December, Delta Air Lines launched daily nonstop flights between Seattle and Lihue. United Airlines expanded its Kaua'i air service that month as well, adding more year-round nonstop daily flights from Denver, Los Angeles and San Francisco.

### COMMUNITY SUPPORT

HTA supported 22 nonprofit organizations on Kaua'i committed to perpetuating Hawaiian culture, preserving natural resources and celebrating community traditions. Funding was provided to two Kūkulu Ola Program recipients, six Aloha 'Āina Program recipients and 14 Community Enrichment Program recipients.

KAUA'I	2016		2017		STATEWIDE 2016		STATEWIDE 2017	
	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT
Community Enrichment Program	25	\$350,000	14	\$240,000	-	-	2	\$107,000
Signature Incubator Program	-	-	1	\$35,000	-	-	2	\$70,000
Kūkulu Ola	2	\$40,000	2	\$75,000	6	\$256,268	2	\$140,000
Major Festivals	1	\$63,000	1	\$63,500	1	\$300,000	1	\$300,000
Native Hawaiian Festivals	-	-	-	-	3	\$600,000	3	\$520,000
Aloha 'Āina	5	\$105,000	6	\$218,500	-	-	2	\$167,963
Safety and Security	1	\$53,000	1	\$53,000	4	\$150,000	3	\$271,000
Sports Events	1	\$25,000	1	\$30,000	1*	\$132,000	3	\$65,000
Other Brand Experience Programs	1	\$20,000	1	\$20,000	2	\$810,000	-	-
Career Development	-	-	-	-	3	\$325,000	3	\$226,000
Visitor Bureau Funding and Other Direct Investments		\$2,643,047		\$2,788,466	-	-	-	-
<b>TOTAL HTA PROGRAM FUNDING</b>		<b>\$3,299,047</b>		<b>\$3,523,466</b>		<b>\$2,573,268</b>		<b>\$1,866,963</b>

\* Oahu and Maui only

## ISLAND OF HAWAI'I

The island of Hawai'i recorded the highest rate of growth in year-over-year visitor spending and arrivals among all of the islands statewide through September, supported by an increase in nonstop flights from Japan and the U.S. mainland.

The island achieved double-digit increases in visitor spending, up 16.4 percent to \$1.78 billion, and visitor arrivals, up 13.5 percent to 1,316,865, compared to the same period in 2016. Average daily spending also increased 4.7 percent to more than \$185 per visitor.

Of the island of Hawai'i's total visitor count, 40.1 percent were from the U.S. West, 27.5 percent from the U.S. East and 10.3 percent from Japan. Following these markets were Canada at 5.6 percent, China at 3.3 percent, and Australia and Europe with 3.1 percent each.

### AIR ACCESS

Total trans-Pacific air seats serving the island of Hawai'i through September was 760,530 seats, up 11.3 percent from the same period in 2016. Of that total, air seats to the Ellison Onizuka Kona International Airport at Keāhole numbered 725,570 (up 11.6 percent) and air seats to the Hilo International Airport numbered 34,960 (up 6.1 percent).

Kona's air service in 2017 included nonstop flights from Anchorage, Alaska; Seattle and Bellingham, Washington; Dallas, Texas; Denver, Colorado; Los Angeles, San Jose, San Diego, Oakland and San Francisco, California; Phoenix, Arizona; Portland, Oregon; Tokyo, Japan; and Vancouver, British Columbia, Canada. Hilo was serviced by nonstop flights from Los Angeles.

In December, Virgin America launched daily nonstop flights between San Francisco and Kona. United Airlines expanded its Kona air service that month as well, adding more year-round nonstop daily flights from Denver, Los Angeles and San Francisco, and increasing to year-round daily nonstop flights between Los Angeles and Hilo.

### COMMUNITY SUPPORT

HTA supported 23 nonprofit organizations on the island of Hawai'i committed to perpetuating Hawaiian culture, preserving natural resources and celebrating community traditions. Funding was provided to seven Kūkulu Ola Program recipients, three Aloha 'Āina Program recipients and 13 Community Enrichment Program recipients.



ISLAND OF HAWAI'I	2016		2017		STATEWIDE 2016		STATEWIDE 2017	
	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT	NO. OF PROGRAMS	AMOUNT
Community Enrichment Program	17	\$310,000	13	\$275,000	-	-	2	\$107,000
Signature Incubator Program	-	-	1	\$35,000	-	-	2	\$70,000
Kūkulu Ola	5	\$125,000	7	\$230,000	6	\$256,268	2	\$140,000
Major Festivals	1	\$63,500	1	\$63,500	1	\$300,000	1	\$300,000
Native Hawaiian Festivals	1	\$50,000	1	\$50,000	3	\$600,000	3	\$520,000
Aloha 'Āina	8	\$238,500	3	\$122,761	-	-	2	\$167,963
Safety and Security	1	\$138,000	1	\$138,000	4	\$150,000	3	\$271,000
Sports Events	3	\$600,000	4	\$630,000	1*	\$132,000	3	\$65,000
Other Brand Experience Programs	2	\$50,000	3	\$113,000	2	\$810,000	-	-
Career Development	-	-	-	-	3	\$325,000	3	\$226,000
Visitor Bureau Funding and Other Direct Investments		\$2,625,488		\$2,887,348	-	-	-	-
<b>TOTAL HTA PROGRAM FUNDING</b>		<b>\$4,200,488</b>		<b>\$4,544,609</b>		<b>\$2,573,268</b>		<b>\$1,866,963</b>

\* Oahu and Maui only





## UNITED STATES

The U.S. mainland is Hawai'i's largest source market for visitors, accounting for more than 60 percent of total visitors to the Hawaiian Islands. Results from both the U.S. West and U.S. East markets were strong through September.

The U.S. West market generated 2,864,784 visitor arrivals (up 4.4 percent from 2016) and \$4.6 billion in visitor spending (up 10.5 percent), while the U.S. East market generated 1,535,934 visitor arrivals (up 5.7 percent) and \$3.27 billion in visitor spending (up 10.4 percent).

Hawai'i Tourism United States (HTUSA) continued to target the avid traveler and added a new target audience – avid explorers, which are typically millennial travelers.



### 2017 HIGHLIGHTS

- Four new television commercials continued HTUSA's highly successful run of the #LetHawaiiHappen Journeys campaign on Travel Channel and HGTV, and in high-end movie theaters in top markets.
- Crafted a three-year strategic approach to further develop the New York City market and change its existing brand perceptions of Hawai'i by sharing the Islands' culture, contemporary cuisine and soft-adventure activities.
- Grew Hawai'i's social media reach to 2 million Facebook followers and 220,000 Instagram followers, all regularly presented with posts on their feeds spotlighting Hawai'i's allure.
- Received honors from *TravelAge West* for Hawai'i as the U.S. destination with the highest client satisfaction, and for HTUSA as the U.S. tourism board providing the best travel agent support.
- Served as principal sponsor of the 24th annual Incentive Research Foundation Education Invitational. Event attendees execute millions of dollars in incentive programs annually. HTUSA intends to capture some of these future business opportunities for Hawai'i.



### 2018 FOCUS

- Initiating the second year of a three-year New York City promotional and marketing campaign for Hawai'i targeting the avid explorer.
- Continuing to refine the #LetHawaiiHappen Journeys campaign to include more storytelling connecting the target audience with local experiences, and spreading the Hawai'i message through consumer advertising, communications and the travel trade.
- Maintaining efforts to generate meetings, conventions and incentives leads, and assist hotel partners with conversions to bookings. Tactics will include working with planners, improving presentation tools and content marketing, and using incentives to generate business.





## JAPAN

Japan is Hawai'i's largest international travel market, comprising 17 percent of total visitor arrivals to the state. Nonstop air service from Japan to Hawai'i increased significantly in 2017, in particular, to the island of Hawai'i, due to the re-establishment of the Ellison Onizuka Kona International Airport at Keāhole as a second international port of entry.

As a result, Hawaiian Airlines introduced three weekly flights between Tokyo's Haneda Airport and Kona in December 2016 (with flights on the week's other four days between Haneda and Honolulu). In September, Japan Airlines relaunched daily service between Tokyo's Narita International Airport and Kona after a seven-year absence.

Air service from Japan further expanded with the June launch of flights from AirAsia X, Southeast Asia's first low-cost carrier serving Hawai'i. AirAsia X's four weekly flights between Kuala Lumpur, Malaysia, and Honolulu include a stopover in Osaka. Also originating from Southeast Asia, air carrier Scoot included a stopover in Osaka with its launch of four weekly flights between Singapore and Honolulu in December.

With this increase in available air seats, visitor arrivals from Japan through September increased 6.7 percent to 1,175,174 with visitor spending up by 11 percent to \$1.68 billion, compared to the same period in 2016.

### 2017 HIGHLIGHTS

- Hawai'i Tourism Japan (HTJ) launched the successful Gohoubi (reward) Hawai'i campaign, which targeted four traveler segments: active senior, couples, friends and three-generation families.
- Introduced the new Hawai'i marketing initiative VEBOSS, a cross-platform promotion featuring virtual reality videos, events, books and social media outreach to entice Japan millennials.
- Extensively marketed the island of Hawai'i as a second international port of entry in support of new nonstop flights from Tokyo's Narita and Haneda airports.
- Organized the Hawai'i Expo in Japan, HTJ's largest consumer sales event, which showcased 55 Hawai'i tourism industry partners to more than 17,000 participants.
- Collaborated with three leading companies – McDonald's, Lawson and Gusto – on the Loco Moco All-Stars campaign promoting Hawai'i through loco moco-themed products.

### 2018 FOCUS

- Attract more first-time visitors to Hawai'i with sales promotions focused in regional cities.
- Promote travel to the neighbor islands, with emphasis on the island of Hawai'i, in support of the new nonstop flights from Narita and Haneda airports.
- Continue to collaborate with the Aloha Program Satellite Offices in the development of niche tour products.







## CANADA

Canada is Hawai'i's second largest international market and fourth largest source market overall for visitors. Weakness in the Canadian economy and devaluation of the Canadian dollar in recent years have impacted travel bookings to Hawai'i. In 2016, this resulted in decreases in visitor spending (down 9 percent), visitor arrivals (down 6.5 percent) and total visitor days (down 7.3 percent).

To reverse this decline, HTA sought out, for the first time, a dedicated marketing contractor for the Canada market via a request-for-proposal process. VoX International of Ontario, Canada, was awarded the contract and given aggressive targets to regain market share beginning with 2017.

Through September, increases have been reported in visitor spending (up 9.8 percent to \$748.8 million) and visitor arrivals (up 9.6 percent to 367,655) in Hawai'i compared to the same period in 2016.



### 2017 HIGHLIGHTS

- Coordinated the Aloha Canada Sales Mission, comprised of travel-trade events featuring destination training and Hawai'i entertainment in Toronto, Calgary and Vancouver.
- Filmed a week of programming in Hawai'i with the popular entertainment news TV series *Entertainment Tonight Canada*, spotlighting five islands and covering key destination themes.
- Implemented a two-month National Geographic Television initiative, which featured a contest promotion with 30-second brand and 15-second promotional commercials.
- Supported 22 top-tier journalists from major publications on their visits to Hawai'i, which ultimately resulted in 198 destination articles featuring the Hawaiian Islands.
- Secured 10 MCI decision makers to participate in the Experience Aloha Business Exchange, which produced three new requests for proposals and commitments for 7,730 room nights.



### 2018 FOCUS

- Utilize a comprehensive approach to train and inform Canada travel agents and trade decision makers to increase front-line confidence in choosing Hawai'i as a destination.
- Incorporate key learning and current data to refine the target Canada media audience through niche and focused opportunities.
- Continue the momentum of 2017 while enhancing tactical efforts to increase length of stay, multi-island visitation and spending among travelers to Hawai'i from Canada.





## OCEANIA

Visitor arrivals from Oceania – comprising Australia and New Zealand – remained flat through September at 291,500, compared to the same period in 2016. Of that total, 51.2 percent of arrivals were first-time visitors. Notably, travel from Oceania to the island of Hawai'i increased 17.4 percent and to Kaua'i by 10.3 percent.

Both average length of stay (9.58 days) and total visitor days (2.8 million) increased slightly through September. However, average daily spending declined by 4.7 percent to more than \$271 per visitor, contributing to a 4 percent drop in total visitor spending to \$758.5 million.

Air seat capacity from both Sydney and Auckland to Hawai'i increased through September by 3.8 percent and 3.2 percent, respectively. Still, total capacity from the Oceania market declined 8.4 percent due to Jetstar Airways suspending its service from Brisbane to Honolulu in October 2016.

### 2017 HIGHLIGHTS

- Hawai'i Tourism Oceania (HTO) organized the Aloha Down Under Workshops, which facilitated 24 Hawai'i industry partners meeting with more than 800 travel agents in Australia and New Zealand for destination information training sessions.
- Showcased Hawai'i on several of Oceania's leading TV breakfast news programs and shows, including Australia's *Sunrise* and *Today Show*, and New Zealand's *Karena & Kasey's Foreign Flavours* and *The Café*.
- Initiated two major integrated consumer campaigns – the largest by HTO to date – which included touchpoints across digital and social media platforms, traditional media, television and a cooperative campaign.
- Hosted the Flight Centre Global Gathering in July, which was attended by more than 3,000 top-selling wholesale and retail travel agents from Australia and New Zealand. The Hawai'i gathering of Oceania's largest travel group provided an impressive showcase of the Islands, and also offered agents a range of strategies and opportunities for marketing Hawai'i to their clients.

### 2018 FOCUS

- Keeping an "always-on" approach to marketing ensuring Hawai'i branding, messaging and campaign activity are a constant in the Oceania market.
- Strengthening and elevating Hawai'i's brand image, and enhancing promotion of experiences across the Hawaiian Islands.
- Working closely with industry partners to develop a range of integrated marketing activities ensuring efforts achieve maximum return on investment.
- Initiating a strong consumer direct-marketing strategy leveraging HTO's digital assets, including its blog, large subscriber database and highly engaged social media channels.







## KOREA

Through September, Hawai'i drew 178,382 visitors from Korea – a decline of 2.6 percent attributed to Jin Air suspending its flights between Seoul and Honolulu for several weeks in the spring for maintenance.

Of total arrivals from Korea, 98 percent traveled to O'ahu, 19 percent to Maui, 10 percent to the island of Hawai'i and 4 percent to Kaua'i. First-time visitors accounted for 82.1 percent of total arrivals.

Asiana Airlines increased its flights between Seoul and Honolulu to daily service in October, adding 6,000 seats to accommodate demand during Korea's peak winter travel season.

### 2017 HIGHLIGHTS

- Hawai'i Tourism Korea (HTK) developed a television project with South Korea travel company HanaTour and cable network JTBC to promote Hawai'i as a honeymoon destination. The episodes – filmed on O'ahu and the island of Hawai'i – aired in July, producing \$2 million in publicity value.
- Organized the Connect to Aloha Hawai'i Travel Mission in Seoul, Gwangju and Busan, with participation from 17 partners and 26 Hawai'i delegates. The Hawai'i contingent conducted business with more than 300 travel agencies and 150 consumers.
- Executed the 2017 Meet Hawai'i MCI VIP Weekend in Seoul in July, which attracted 60 industry partners, including key corporate clientele, airline and hotel partners.
- Participated in HITS 2017, Korea's largest travel show, which attracted more than 100,000 attendees. HTK coordinated the June travel show's Hawai'i Pavilion, which generated more than 5,000 online and offline bookings, representing a 49 percent increase in sales compared to 2016.

### 2018 FOCUS

- Developing niche target markets by conducting key promotions, including:
  - Neighbor island promotions to encourage multi-island visits.
  - Edu-tour promotions focused on sustainability.
  - A "Hawai'i-politan" Dual City promotion co-op with United States destination marketing organizations (DMOs).
- Leveraging celebrity promotions through television shows and tourism ambassador appointments.
- Expanding the #AlohaEverywhere social media campaign by adding an Instagram element and continuing to provide support for cultural events.



## CHINA

Through September, travelers from China engaged in average daily spending of \$329 while in Hawai'i, the highest of all of the state's visitor markets.

Still, year-over-year arrivals from China were down 9 percent to 122,425 visitors, partially due to concerns about the U.S. travel ban, visa situation and political environment, which created a "wait-and-see" sentiment among many potential travelers.

Notably, travel demand from China's second- and third-tier cities is growing rapidly, providing Hawai'i with new markets to attract visitors.

### 2017 HIGHLIGHTS

- Organized the Camp Aloha 2017: China Sales Missions in Beijing, Shanghai, Xi'an and Hong Kong, which facilitated 25 Hawai'i industry partners meeting with more than 400 travel wholesalers, tour operators, retail agents and MCI planners.
- Launched the Romance in Excess promotion featuring the Hawai'i wedding of Taiwanese actress and singer Ady An Yi-xuan. The event generated 333 million page views on Chinese social media website Sina Weibo; was featured on 185 broadcast, print, digital and social media channels; and generated \$7.2 million in publicity value.
- Introduced Chinese author, entrepreneur and social media influencer Wang Xiao as the 2017 China Ambassador for the Happy Healthy Hawai'i promotion. Wang's Hawai'i visit reached 12.5 million social media followers and generated more than \$2 million in publicity value.
- Launched a new partnership with online travel agency and rental website Zuzuche.com for self-drive Hawai'i vacation products to power leisure bookings. Zuzuche also showcased adventures and activities to enjoy in Hawai'i.

### 2018 FOCUS

- Build on the momentum of Happy Healthy Hawai'i promotions and continue to execute consumer campaigns with the same overarching theme to further leverage and optimize in-market resources.
- For first-tier cities, focus on leisure product education and development aimed at generating in-depth and single-destination Hawai'i itineraries.
- For second-tier cities, focus on increasing the Hawaiian Islands' inclusion in U.S. itineraries offered by travel wholesalers, tour operators and retail agencies organizing packages for groups or customized tours.







## TAIWAN

Through September, Hawai'i visitor arrivals from Taiwan increased 1.9 percent to 14,324 visitors over the same period in 2016. The state continues to face stiff competition in the market from short-haul destinations in Asia. However, interest from MCI groups increased with the October introduction of China Airlines' new Airbus A350 aircraft for its Taipei-Honolulu air service.

### 2017 HIGHLIGHTS

- Hawai'i Tourism Taiwan initiated a social media campaign, Best Hawai'i Couple, promoting the Islands as an LGBT-friendly destination. The campaign generated more than 657,300 impressions, with a publicity value of \$464,519.
- Collaborated with Taiwanese TV program *iWalker Moving Kitchen* to showcase Hawai'i regional cuisine and island beauty over five episodes, reaching more than 5 million viewers and generating a publicity value exceeding \$3 million.
- Partnered with KAYAK, Leica and well-known Taiwan influencers the Mogis Family to promote the Islands by sharing video of the family's Hawai'i vacation via social media channels. The campaign generated more than 861,570 impressions, with a publicity value of \$508,326.

### 2018 FOCUS

- Collaborating with China Airlines on maintaining a sustainable load factor for its Hawai'i flights, particularly during off-peak periods.
- Increasing efforts to prospect leads for incentive group business.
- Utilizing social media and digital channels to promote Hawai'i.



## HONG KONG

One of Asia's top air-travel hubs, Hong Kong provides access to China's 120 million residents in the Pearl River Delta Region. Additionally, Hong Kong is a highly sought-after source market for outbound travelers, as its residents averaged 12.7 trips per person in 2016. Since its opening in mid-2016, the Hawai'i Tourism Hong Kong (HTHK) office has mobilized key travel-trade partners to build Hawai'i brand awareness and travel demand through cooperative campaigns.

### 2017 HIGHLIGHTS

- HTHK partnered with travel services provider Travel Expert for the Aloha Roadshow to reach more than 200,000 potential Hawai'i visitors.
- Partnered with *U Magazine* and *Skypost* on three Hawai'i-based episodes of celebrity Aunt Ha-wai's TV travel series. The episodes, which showcased the Hawaiian Islands, reached more than 1.5 million viewers.
- Launched a two-week advertising campaign on the three main train lines of Mass Transit Railway featuring 56 posters with iconic Hawai'i imagery. The campaign reached an estimated 4,589,400 passengers daily.

### 2018 FOCUS

- Promote the Enjoy Travel With a Conscience initiative highlighting eco-friendly attractions and activities travelers can enjoy in Hawai'i.
- Launch emotionally connected campaigns elevating awareness about Hawai'i's brand among targeted lifestyle segments.
- Inspire LGBT travelers to visit the Hawaiian Islands by working with Hawai'i stakeholders and Hong Kong wholesalers to develop new product offerings.





## SOUTHEAST ASIA

Hawai'i visitor arrivals from the Southeast Asia market – which includes Malaysia, Singapore, Indonesia and Thailand – through September increased 28.6 percent to 20,794 visitors over the same period in 2016. The outlook for growth in the market continues to be favorable, supported by AirAsia X's Kuala Lumpur-Osaka-Honolulu service, which launched in June, and the introduction of air carrier Scoot's Singapore-Osaka-Honolulu service in December.

### 2017 HIGHLIGHTS

- Hawai'i Tourism Southeast Asia partnered with Apple Vacations to showcase Hawai'i on LED displays in Kuala Lumpur for five weeks prior to the city's MATA Fair Expo, generating more than 85,000 impressions.
- Conducted the Aloha Sales Mission in Kuala Lumpur with participation from more than 100 in-market media and travel-trade industry professionals.
- Implemented the Hawai'i Dream Come True social media campaign, reaching more than 200,000 people via 7,500 social engagements over multiple channels.

### 2018 FOCUS

- Collaborate with airlines to bolster travel demand and help support a healthy load factor for their flights to O'ahu.
- Increase direct consumer outreach and marketing campaigns to elevate Hawai'i's brand.
- Cultivate Hawai'i experts with year-round workshops and in-depth online training programs.



## EUROPE

Hawai'i Tourism Europe promotes Hawai'i to travelers from the United Kingdom, Germany, France, Switzerland and Scandinavia. Through September, visitors from Europe totaled 106,359 – a year-over-year decline of 4 percent. However, European travelers stayed an average of 13 days, the lengthiest of the state's visitor markets. Of total arrivals from Europe, 73 percent traveled to O'ahu, 43 percent to Maui, 38 percent to the island of Hawai'i and 24 percent to Kaua'i.

### 2017 HIGHLIGHTS

- Implemented the multifaceted Hawai'i Through a Lens marketing campaign in the United Kingdom and Germany.
- Worked extensively with key trade partners and new operators to educate front-line staff, and promoted Hawai'i at key European tradeshows.
- Initiated a press trip program that has generated 2.2 million impressions in the United Kingdom and 600,000 impressions in Germany. Additionally, 15 individual media trips to the Hawaiian Islands were coordinated.

### 2018 FOCUS

- Launching an integrated digital consumer campaign with Hawai'i local heroes highlighting the Islands' diversity, culture, sustainability and natural beauty.
- Implementing an online marketing campaign with travel guidebook publisher Lonely Planet during Germany's peak booking season.
- Continuing training, educating and conducting of sales calls with travel-trade personnel and media, while increasing exposure for Hawai'i through social media and public relations.





## BUSINESS DESTINATION MANAGEMENT

Meet Hawai'i is a collaborative effort of HTA, the Hawai'i Convention Center and HTA's Global Marketing Team to market the Hawaiian Islands as a world-class destination for meetings, conventions and incentive (MCI) programs. HTA established Hawai'i Tourism Global MCI in 2017 to oversee this market segment, develop strategies and implement programs to generate new MCI business opportunities, including citywide meetings for the Hawai'i Convention Center.

Through September, MCI visitors to Hawai'i declined slightly (down 0.6 percent to 374,709) compared to the same period in 2016, with more visitors attending conventions (up 1.5 percent to 185,974) and corporate meetings (up 8.7 percent to 68,756), but fewer taking part in incentive trips (down 8 percent to 132,144).

### 2017 HIGHLIGHTS

- Launched the inaugural Experience Aloha Business Exchange on the island of Hawai'i. HTA's Global Marketing Team hosted 90 international meeting planners for an experiential tour and business conference. Fifty MCI stakeholders provided support and met with the planners. Tours to Maui, O'ahu and Kaua'i were also organized.
- Organized the Spring Update Educational Tour and Fall Hawai'i Citywide Forum, programs that targeted citywide prospects. Activities included site inspections of the Hawai'i Convention Center and Waikiki hotels, meetings with satisfied clients, and interaction with community leaders through the 'Elele program.
- Elevated Hawai'i's profile in targeted vertical markets with new, creative approaches. To attract science-based meetings, the Hawai'i Convention Center engaged the Council of Engineering and Scientific Society Executives by hosting breakfast for the CEO meeting and lunch for all delegates. Also, the Hawai'i Convention Center exhibited to 22,000 scientists at the American Geophysical Union Convention and hosted a reception at the American Medical Association Convention.

### 2018 FOCUS

- Capitalize on the strength of HTA's integrated global MCI sales team to develop creative marketing approaches and strategic initiatives to improve productivity.
- Continue biannual meetings with key industry sales and marketing leaders to discuss high-level marketing strategies.
- Commence the Hawai'i Convention Center Customer Advisory Board.
- Continue monthly *Alu Like Mai* ("Work Together!") meetings, during which hotel sellers and the Hawai'i Convention Center carefully review initiatives and determine approaches to build the sales pipeline and secure more business.

2016 HAWAII CONVENTION CENTER AND HAWAII TOURISM UNITED STATES ROOM PRODUCTION



## 2017 EVENTS LISTING

EVENT NAME	START	END	DELEGATES	TAX REVENUE STATEWIDE (\$)
SCCM Annual Congress 2017	1/20/17	1/25/17	5,800	2,656,478
SCCM Annual Congress 2017 overflow	1/20/17	1/25/17	1,000	458,013
International Group 2017	2/7/17	2/7/17	1,000	458,013
AAU Volleyball Honolulu Grand Prix 2017	2/17/17	2/20/17	1,000	458,013
ASLO Meeting 2017	2/25/17	3/3/17	2,000	916,027
Honolulu Festival 2017	3/10/17	3/12/17	5,500	2,519,074
HIM 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 Group 2017	5/4/17	5/4/17	300	137,404
International Society for Laboratory Hematology 2017	5/4/17	5/6/17	1,200	549,616
Honolulu Ekiden and Music 2017	5/20/17	5/20/17	1,000	458,013
Global Games 2017	5/20/17	5/21/17	1,000	458,013
Shinnyo-en Hawaii 2017	5/28/17	5/28/17	2,000	916,027
International Group 2017	5/30/17	5/30/17	200	91,603
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
Aloha International Piano Festival 2017	6/16/17	6/24/17	300	137,404
AVID 2017	6/19/17	6/21/17	700	320,609
Plant Biology 2017	6/22/17	6/28/17	1,800	824,424
Jam On It Pacific Rim Championships 2017	6/30/17	7/2/17	1,800	824,424
International Group 2017	7/10/17	7/10/17	400	183,205
Domestic Corporate Group 2017	7/15/17	7/15/17	3,500	1,603,047
IEEE CVPR 2017	7/19/17	7/27/17	4,500	2,061,060
International Group 2017	8/9/17	8/11/17	3,000	1,374,040
Domestic Corporate Group 2017	9/29/17	10/5/17	1,200	549,616
Domestic Corporate Group 2017	10/16/17	10/17/17	3,000	1,374,040
Homeaway Summit 2017	11/6/17	11/7/17	700	320,609
AMA Interim Meeting of the House of Delegates 2017	11/6/17	11/15/17	3,000	1,374,040
Applied Materials Sales Training	11/22/17	11/30/17	1,000	458,013
Domestic Group 2017	12/2/17	12/6/17	1,400	641,219
Honolulu Marathon Expo 2017	12/7/17	12/11/17	17,500	8,015,234
International Group 2017	12/10/17	12/12/17	650	297,709
12th IEEE International Conference on Power Electronics and Drive	12/12/17	12/15/17	300	137,404
Hoops in Hawaii Holiday Classic	12/16/17	12/20/17	500	229,007
<b>Total Definite Bookings for 2017: 34 Events</b>			<b>85,250</b>	<b>\$39,045,639</b>



## 2018 EVENTS LISTING

EVENT NAME	START	END	DELEGATES	TAX REVENUE STATEWIDE (\$)
AAU Volleyball Honolulu Grand Prix 2018	2/16/18	2/19/18	1,000	458,013
HIM 2018	3/15/18	3/17/18	600	274,808
AACSB International Conference and Annual Meeting (ICAM) 2018	4/20/18	4/24/18	1,500	687,020
ARVO Annual Meeting 2018	4/25/18	5/3/18	10,300	4,717,538
AAPD Annual Session	5/22/18	5/28/18	3,000	1,374,040
Asia Oceania Geosciences Society (AOGS) Symposium 2018	6/3/18	6/9/18	2,000	916,027
YBOA International Basketball Tournament	6/17/18	6/23/18	1,500	687,020
40th annual Conference of the IEEE Engineering in Medicine and Biology Society	7/16/18	7/21/18	3,000	1,374,040
ADA 2018	10/12/18	10/24/18	25,000	11,450,335
Second annual Art Hawaii International	10/27/18	11/5/18	10,000	4,580,134
Pac Futsal 2018	11/27/18	12/2/18	800	366,411
<b>Total Definite Bookings for 2018: 11 Events</b>			<b>58,700</b>	<b>\$26,885,386</b>



## ONLINE/WEBSITE PROJECTS

HTA continues to refine a digital marketing strategy that recognizes the shift by global travel consumers to more personalized forms of sharing, and the need for improved infrastructure and capacity to keep Hawai'i top-of-mind. This mobile-first approach enhances the Hawai'i visitor experience pre- and post-arrival while also engaging local stakeholders. HTA focuses on authentic digital content creation, global digital platforms customized for multiple target markets, and a comprehensive social media strategy aligned with Hawai'i's brand guidelines.

### 2017 HIGHLIGHTS

- Overhauled the state's most important digital asset for reaching potential visitors, GoHawaii.com, to deliver immersive, sensory-rich, multimedia content experiences transcending words and capturing the vibrancy of Hawai'i across all digital devices. Hawaiian language, chants, art, music and dance are being integrated throughout the site.
- Worked with the Global Marketing Team and Island Chapter Visitors Bureaus to implement a centralized global social media marketing program to maintain brand consistency. This included the development of a social media content guidebook. User-generated content from social media platforms was also integrated into the new GoHawaii.com.
- Launched the WeShare Hawai'i mobile application to build a sustainable community engagement program encouraging the sharing of stories through food. As of September, the program featured more than 100 curators and 400 recommendations. Additionally, Facebook Live events brought WeShare Hawai'i users and curators together for dialogue through culinary journeys.

### 2018 FOCUS

- Continue to develop authentic, fresh digital content harnessing assets created by residents, visitors and influencers.
- Continue to explore new technology, channels and tools to drive brand awareness and online conversions targeting Hawai'i's key audiences.
- Continue to work with the Global Marketing Team and industry partners to develop robust online and digital programs for each market.







## ELEVATE HAWAII'S VALUE PERCEPTION

Ke one lau'ena  
a Kāne.

*The rich, fertile land of Kāne.*

Hawai'i'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.



## NATIVE HAWAIIAN FESTIVALS

HTA annually supports important and iconic Native Hawaiian festivals through its Major Festivals and Product Development programs. These festivals, and others like them, are vital to perpetuating Hawai'i's indigenous culture among residents of all ages and visitors who travel from around the world to experience the authenticity of the Hawaiian Islands.

Additionally, HTA supports 31 Native Hawaiian cultural programs in communities statewide with funding through its Kūkulu Ola Program.

HTA is committed to supporting cultural practitioners, musicians and artists who share its dedication to enhance widespread public awareness of Hawai'i's native culture through a greater understanding of its significance to Hawai'i's future.

### 2017 HIGHLIGHTS

- Continued as a major sponsor of Aloha Festivals and King Kamehameha Celebration events, which bring residents and visitors together in communities statewide.
- Continued as a major sponsor of additional festivals showcasing Hawai'i's indigenous culture, including the Prince Kūhiō Celebration, Prince Lot Hula Festival, Merrie Monarch Festival, Mele Mei and Nā Hōkū Hanohano Awards.
- Sponsored numerous Hawaiian cultural festivals statewide celebrating Hawai'i's traditions in music and dance, including 'ukulele, kī hō'alu (slack-key) guitar and steel guitar musicianship, and hula.

### 2018 FOCUS

- Continuing to increase public knowledge within the Islands and in markets worldwide about the importance of the Hawaiian culture by supporting Native Hawaiian festivals.
- Continuing to assist organizers of Native Hawaiian festivals in increasing public awareness and building attendance by providing recommendations for planning, executing and marketing of events, as well as offering insights on sponsorship development.
- Broadening awareness of Hawaiian culture among avid explorers and millennial travelers by soliciting support for a new statewide Makahiki Games Festival.





## MAJOR FESTIVALS AND SIGNATURE EVENTS

HTA is committed to supporting major festivals and signature events highlighting the cultures, people, attributes and locations that make the Hawaiian Islands one of the best places in the world to live and visit.

These include cultural, arts and culinary celebrations showcasing Hawai'i's heritage and resident pride in their communities, and attracting visitors seeking authenticity in their travel experiences.

Most HTA-sponsored festivals and events are strategically held in off-peak travel months to support tourism industry partners by increasing interest from potential visitors to book trips during these periods.

For a listing of major festivals and signature events sponsored by HTA, visit [GoHawaii.com](http://GoHawaii.com).

### 2017 HIGHLIGHTS

- POW! WOW! Hawai'i brought together more than 100 artists from the Islands and around the world to create one-of-a-kind murals on walls and building facades throughout Honolulu's Kaka'ako District. The weeklong event attracted residents and visitors, and included a concert featuring world-renowned DJ Steve Aoki.
- The 37th annual Hawaii International Film Festival drew filmmakers from North America, the Asia-Pacific region and Hawai'i, showcasing new films, recognizing emerging cinema talent and facilitating dynamic cultural exchanges among attendees.
- The seventh annual Hawai'i Food and Wine Festival, held on O'ahu, Maui and the island of Hawai'i, featured delicious and diverse cuisine and spirits from more than 100 internationally distinguished master chefs, wine and spirit producers, and culinary personalities.

### 2018 FOCUS

- Collaborating with community leaders to develop events meeting HTA's criteria for major festivals and signature events, and, in doing so, further enhancing the Hawai'i experience for residents and visitors.
- Sharing and celebrating the rich blend of cultures from the Asia-Pacific region and the Hawaiian Islands through music, dance and arts, educational programs and special activities at the Honolulu Festival and Pan-Pacific Festival. Throughout their multiday programming, the festivals encourage a more informed appreciation of multiple cultural backgrounds.
- Continuing to deepen visitor interest in discovering more about the Hawai'i travel experience by showcasing its diverse appeal through festivals and events highlighting the uniqueness of the culture, music, arts and culinary traditions of the Hawaiian Islands.



## SPORTS MARKETING

HTA supports a strong portfolio of sports events throughout the Hawaiian Islands that bolsters the state's economy, generates worldwide TV exposure and reinforces Hawai'i's brand image.

HTA's objectives are to utilize sports as a catalyst to drive travel demand and ensure tax dollars are spent responsibly, with a goal of elevating Hawai'i as a premier sports destination. Its overall strategy is attracting and funding sports events that deliver maximum benefit to Hawai'i and its residents.

### 2017 HIGHLIGHTS

- Sponsored 31 diverse sports events statewide, including the PGA Tour's Sony Open in Hawai'i, the LPGA's LOTTE Championship, Duke's OceanFest, the Queen Lili'uokalani Canoe Race, the IRONMAN World Championship triathlon, the XTERRA World Championship, the Honolulu Marathon, the Hawai'i Bowl college football game, and the Hawaiian Airlines Diamond Head Classic college basketball tournament.
- Established a comprehensive marketing partnership with the NBA's Los Angeles Clippers featuring Hawai'i travel promotions during the 2016-17 regular season, and culminating with the team's training camp and two pre-season games against the Toronto Raptors held in Honolulu before the start of the 2017-18 season.
- Extended HTA's sponsorship support of the Women's Tennis Association's (WTA) Hawai'i Open to three years through 2019. Hawai'i's only WTA tournament, the Hawai'i Open features 32 world-ranked players competing in singles and doubles matches, which are broadcast to TV audiences worldwide.
- Introduced new sports courts for the Hawai'i Convention Center configurable to simultaneously stage up to 28 volleyball or badminton matches, 18 high school basketball games or 11 futsal (indoor soccer) matches. A regulation NBA- and NCAA-approved basketball court with a solid wood floor was also acquired.

### 2018 FOCUS

- Continuing to update the sports marketing strategy and support sports events that help drive visitor traffic from all major markets – especially during off-peak travel periods – and are broadcast to TV audiences in domestic and international markets.
- Attracting potential travelers and generating TV exposure to reach a broader range of audiences by expanding Hawai'i's sports portfolio to include new types of competitive events, such as soccer, rugby and beach volleyball.
- Expanding the Hawai'i Convention Center's brand as a host site for various sports events, including volleyball, basketball, futsal and badminton tournaments attracting athletes, teams and their supporters from markets worldwide – in particular, developing travel markets in Asia.





## BRAND DEVELOPMENT PROJECTS

HTA's brand development initiatives support the marketing of Hawai'i tourism through programs designed to raise awareness among travel consumers about the unmatched appeal and diverse offerings of the Hawaiian Islands. Most initiatives target travel trade and hospitality providers, offering support and resources to enhance their business objectives in the Hawaiian Islands.

### 2017 HIGHLIGHTS

- Implemented the Experiences of Hawai'i campaign – a post-arrival marketing campaign highlighting HTA-supported events and projects through print, in-room television and free Wi-Fi in resort areas.
- Held meetings with key stakeholders in March to increase dialogue and support between HTA's Global Marketing Team and industry stakeholders on O'ahu and Kaua'i.
- Organized Hawai'i's marketing exhibition at the U.S. Travel Association's annual IPW Marketplace in Washington, D.C., in June, promoting the Hawaiian Islands to international travelers with support from Hawai'i Tourism Europe, Hawai'i Tourism Oceania, Hawai'i Tourism Canada, Hawai'i Tourism China, Hawai'i Tourism Hong Kong, the Island Chapter Visitors Bureaus and Anthology Marketing Group. The HTA-led contingent met with more than 190 global tour operators and 40 media, and hosted a special networking event for international tour operator and airline representatives to interact with Hawai'i industry partners.

### 2018 FOCUS

- Continuing to showcase the diversity of the Hawaiian Islands by highlighting HTA-supported events and projects through the Experiences of Hawai'i campaign.
- Presenting the Spring Marketing Update to inform the tourism industry on Hawai'i's global marketing initiatives, and hosting stakeholder meetings on O'ahu, Maui and the island of Hawai'i.
- Establishing a strong Hawai'i presence to support the marketing of international travel to the Hawaiian Islands at the U.S. Travel Association's 2018 IPW Marketplace, set for Denver, Colorado, in May.



## AIR ACCESS

Air access is critical to the state's tourism economy and essential to the quality of life that Hawai'i residents enjoy, including their travel to the U.S. mainland and international destinations. HTA is vigilant in its focus on maintaining strong air access.

### 2017 HIGHLIGHTS

- Developed cooperative marketing campaigns to bolster demand within key strategic markets.
- Supported the June launch of AirAsia X flights between Kuala Lumpur, Malaysia, and Honolulu. The carrier's four weekly flights include a stopover in Osaka, Japan, supporting travel demand from that region.
- Welcomed new and/or expanded air access from the following carriers:
  - Japan Airlines, which relaunched flights between Tokyo and Kona in September after a seven-year absence.
  - United Airlines, which increased its capacity to the neighbor islands by 20 percent with flights from Chicago, Denver, Los Angeles and San Francisco, launched in December.
  - Delta Air Lines, which launched daily flights between Seattle and Līhu'e in December.
  - Virgin America, which launched daily flights between San Francisco and Kona in December.
  - Scoot, which, in December, launched four weekly flights between Singapore and Honolulu that include a stopover in Osaka.
- Hosted the third annual Airline Summit to educate airline partners on the value of Hawai'i as a travel destination.
- Worked with Hawaiian Airlines, Japan Airlines and tourism stakeholders to support new international service to Kona.



### 2018 FOCUS

- Further development and diversification of new airline routes serving the U.S. mainland and Southeast Asia.
- Collaborate with airline partners to support the absorption of increased seat capacity.
- Collaborate with the State Department of Transportation to prepare for service from ANA's new Airbus A380 in 2019.



## CRUISE ACCESS

Cruise ships offer visitors an alternative means of experiencing the Hawaiian Islands. HTA continues to work with its consultant Access Cruise Inc. to develop cruise line business for Hawai'i

### 2017 HIGHLIGHTS

- Hosted the second annual Cruise Executive Summit, attended by top leaders from Crystal Cruises, Princess Cruises, Holland America Group, Silversea Cruises, Royal Caribbean International, Disney Cruise Line and The World Residences at Sea.
- Welcomed several inaugural callings with new vessels, including the first port call to Lāna'i by Seabourn Cruise Line in November.

### 2018 FOCUS

- Hosting the third annual Cruise Executive Summit.
- Continuing to develop cruise ship access and diversifying the portfolio of cruise lines serving Hawai'i.



## CAREER DEVELOPMENT

HTA continues to collaborate with educational organizations and businesses in encouraging Hawai'i high school students to pursue careers in travel and tourism. Additionally, HTA partners with training providers to offer workshops and certification programs enhancing the quality of knowledge, skills and service levels of employees working in the tourism industry.

### 2017 HIGHLIGHTS

- Supported the sixth annual LEI (Leadership, Exploration, Inspiration) Program on Maui, O'ahu, Kaua'i and the island of Hawai'i in April, with participation from more than 800 students from 37 high schools statewide. Support was provided by 96 college student mentors, 110 community volunteers, 28 hotels and 100 businesses.
- Offered Hawai'i high school- and college-age students opportunities to participate in the 2017 Global Tourism Summit, highlighted by a student debate competition with 18 teams participating. Other student activities included a Pacific Asia Travel Association student forum, and opportunities to network with tourism professionals and volunteer for events.
- Provided information on standards and content in support of Tour Guide Certification and Customer Service Certification programs offered by Kapi'olani Community College. The certification programs were offered during the 2017 Global Tourism Summit.

### 2018 FOCUS

- Continue to support quality programs promoting future career pathways in tourism.
- Continue to support certification programs helping ensure tourism industry professionals are well-trained and can deliver on the brand experience.
- Continue to collaborate with educational institutions and industry stakeholders on workforce development.





## SAFETY AND SECURITY

HTA is committed to assisting organizations responsible for keeping Hawai'i safe and secure. Under Hawai'i Revised Statute 237D-6.5 (6) (2), HTA is required to spend one-half percent of the Tourism Special Fund on safety and security initiatives. The HTA-funded Visitor Assistance Program provides assistance, resources and aloha to visitors in need statewide.

### 2017 HIGHLIGHTS

- Through September, HTA's Visitor Assistance Program responded to 1,156 cases and assisted 2,592 visitors who were victims of a crime or needed support during their Hawai'i stay. Services utilized included assistance with hotel and airline bookings, providing meal coupons and replacing lost identification.
- Teamed with certified lifeguards in all four Hawai'i counties to support the Junior Lifeguard Program, which provided 2,000 youths with training to enhance their ocean safety awareness, and teach them first aid and water-rescue skills.
- Supported the 2017 State of Hawai'i Drowning Prevention and Ocean Safety Conference, held in July. Participants included lifeguards, public health and injury prevention practitioners, ocean activities operators, government and elected officials, and visitor industry leaders.

### 2018 FOCUS

- Continuing to support the Visitor Assistance Program in all four counties.
- Continuing to serve as the lead agency communicating to the tourism industry during crises.
- Continuing to explore new outreach channels to deliver safety messages to visitors.





## TOURISM RESEARCH AND PLANNING

The availability and utilization of timely, insightful visitor research is vital to Hawai'i's tourism industry stakeholders for making sound business decisions. Hawai'i tourism is in a very mature phase requiring continuous research and gathering of data to supplement knowledge for enhancing brand awareness, improving product experiences, maintaining competitive advantages against other destinations, and strategically expanding into new markets. HTA's Tourism Research Division ensures quality marketing research is available to educate tourism stakeholders and help empower them in making intelligent, data-driven decisions.

### 2017 HIGHLIGHTS

- Began publishing the monthly *Hawai'i Hotel Performance Report*, featuring key statistical data and analysis, including occupancy, average daily rate (ADR) and revenue per available room (RevPAR) for hotel stays on a statewide level and for O'ahu, Maui County, Kaua'i and the island of Hawai'i.
- Consistently published the *Monthly Visitor Statistics Report*, *Airline Seat Outlook Report*, *2016 Annual Visitor Research Report*, *2016 Annual Visitor Satisfaction and Activities Report*, *2017 Annual Visitor Plant Inventory*, and quarterly timeshare reports.
- Issued findings of the *2017 Resident Sentiment Study*.
- Completed and published the State of Hawai'i's first-ever studies on LGBT travel, with comprehensive findings presented for the U.S., Canada, Mainland China, Australia, Taiwan and Japan markets.
- Continued to monitor and evaluate HTA's signature festivals and events.

### CHANGES IMPLEMENTED

- Published monthly fact-sheet updates for Hawai'i's tourism industry and global markets.
- Implemented tools to expand monthly reporting capabilities, including the addition of reports for Moloka'i and Lāna'i, and expanded accommodations categories.
- Relunched the Research Advisory Committee to better understand the needs of HTA's research data users and seek their input.

### 2018 FOCUS

- Refocusing the *Visitor Satisfaction and Activity Study* to include island-specific information useful to HTA stakeholders.
- Begin publishing monthly characteristics reports for the Hong Kong and Southeast Asia markets.
- Collaborate with the State Department of Business, Economic Development and Tourism (DBEDT) on developing the data warehouse.

### 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>Hawai'i Hotel Performance Report</i>	Infrastructure Research	By the last day of the following month
<i>Air Seat Outlook (3 months)</i>	Infrastructure Research	By the last day of the month prior
<i>Annual Visitor Research Report</i>	Annual Visitor Research	Annually, in the fall
<i>Visitor Plant Inventory</i>	Visitor Plant Inventory	Annually, in December
<i>Quarterly Visitor Satisfaction Monitoring Report</i>	Visitor Satisfaction and Activity	Quarterly
<i>Annual Visitor Satisfaction and Activities Report</i>	Visitor Satisfaction and Activity	Annually, in the fall
<i>Quarterly Timeshare</i>	Infrastructure Research	Quarterly
<i>Marketing Effectiveness Study</i>	Marketing Research	Spring
<i>Survey of Resident Sentiment</i>	Evaluation and Performance Measures	Annually, in December
<i>Daily Air Passenger Counts</i>	DBEDT	By 3 p.m. each workday
<i>Tourism Forecast</i>	DBEDT	Quarterly



## 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.



## COMMUNICATIONS

HTA consistently keeps Hawai'i's tourism industry, news media and the general public informed about its programs, initiatives, research and positions on key issues.

HTA achieves this communication outreach through issuance of news releases, distribution of a monthly e-bulletin, interaction with news media, public presentations statewide, briefings to tourism stakeholders, and major industry events. The largest and most notable of these events are HTA's annual Spring Marketing Update and Global Tourism Summit in the fall.

### 2017 HIGHLIGHTS

- Between January and November, HTA developed and issued 48 news releases to tourism stakeholders, news media and members of the general public enrolled to receive its communication materials. The news releases covered multiple topics, including HTA's stance on major issues potentially affecting tourism, important industry announcements and marketing initiatives, and Hawai'i's monthly visitor statistics. The news releases can be found online at [www.HawaiiTourismAuthority.org](http://www.HawaiiTourismAuthority.org).
- Accommodated more than 300 requests from local and national journalists for interviews, statements, articles and/or background information for media coverage.
- Enhanced the design and presentation of information in HTA's monthly e-bulletin newsletter, which provides updates on Hawai'i tourism promotions being implemented by HTA's Global Marketing Team.
- Conducted meetings with tourism stakeholders statewide to seek community feedback on strategies for moving tourism forward.
- Provided HTA's position and key information addressing high-profile issues potentially impacting Hawai'i travel demand, such as the proposed travel ban, rat lungworm disease and the threat of missile attacks by North Korea, to help deter the spread of false information, especially in markets outside of the Islands.

### 2018 FOCUS

- Reinforcing the goals of HTA's Five-Year Strategic Plan (2016-20) and how HTA's marketing initiatives and public outreach are aligned with the plan's vision for improving the future of Hawai'i's tourism industry.
- Communicating to the public-at-large the benefits of a strong, successful tourism industry to the state's economic foundation and Hawai'i's quality of life.
- Encouraging broad-based support among residents, tourism providers and visitors for HTA's position on embracing responsible tourism and its importance to Hawai'i's future success as a travel destination.





# GLOBAL TOURISM SUMMIT

September 19-21, 2017

For 2017, HTA changed the name of its annual gathering of thought leaders to the Global Tourism Summit to more accurately reflect Hawai'i's emergence as a leader in international travel and tourism.

Responsible tourism and its importance to the industry's sustainability for Hawai'i and destinations worldwide was the summit's overall theme. Sessions and highly regarded speakers from multiple disciplines covered a wide range of topics and trends important not only to the industry's future but Hawai'i's future as well, including Hawaiian culture, eco-tourism, innovation and technology.





## 2017 HIGHLIGHTS

- Drew more than 1,800 attendees to the summit from 18 countries. Additionally, 49 corporate sponsors and 50 exhibitors provided support for the summit.
- Honored the Polynesian Voyaging Society and crew of the Hōkūle'a voyaging canoe with HTA's highest honor, the Tourism Legacy Award, for completing their historic, three-year Mālama Honua Worldwide Voyage.
- Secured four prominent speakers who made the following keynote presentations:
  - Billy Beane, executive vice president of baseball operations for the Oakland Athletics, who presented *Moneyball: The Art of Winning an Unfair Game*.
  - Neil Everett, ESPN SportsCenter anchor, who presented *Paying Aloha Forward: How Hawai'i Saved My Life*.
  - Ted Allen, author and Food Network personality, who presented *Food is EVERYTHING*.
  - Ólöf Ýrr Atladóttir, director general of the Icelandic Tourist Board, who presented *Holistic Tourism*.
- Expanded the student debate competition to feature 18 high school teams in a round-robin tournament addressing the topic *Resolved: Tourism Helps to Preserve Culture*. Ten teams were from outside Hawai'i, with two teams each from Japan and Hong Kong, and one team each from China, Taiwan, Malaysia, New Zealand, Canada and the U.S. mainland. The eight remaining teams were from Hawai'i.
- Showcased 20 chefs from throughout the state at the Aloha Reception, offering delegates an array of Hawai'i-themed dishes and cuisine to enjoy.

## 2018 FOCUS

- Continue to evolve the Global Tourism Summit in 2018 to address issues and forward-looking topics vital to the future of tourism in the Hawaiian Islands and globally. The summit is set for October 1-3.









# HAWAII VISITOR STATISTICS STATEWIDE AND BY ISLAND

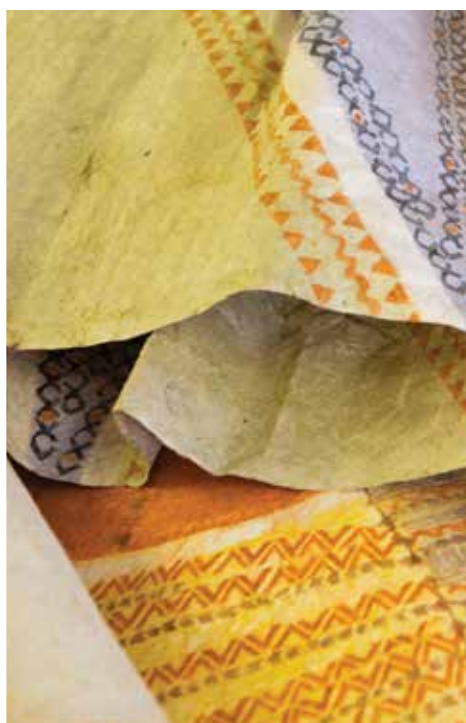
Source for All Tables: Hawaii's Tourism Authority

STATEWIDE	2016 FINAL	2017 FORECAST	% CHANGE**	2017 YTD*	% CHANGE YTD*
Visitor Expenditures	\$15.91B***	\$16.64B†	+4.6%	\$12.56B	7.1%
Visitor Arrivals	8,934,277	9,231,424	+3.3%	7,017,268	4.9%
Per Person Per Day Spending	\$196.9	\$200.2	+1.7%	\$199.8	2.4%
Total Air Seats <sup>†††</sup>	12,020,545	12,147,992 <sup>††</sup>	+1.1%	9,165,745	0.8%

O'AHU	2016 FINAL	2017 YTD*	% CHANGE YTD*
Visitor Expenditures	\$7.34B	\$5.73B	5.9%
Visitor Arrivals	5,447,229	4,264,304	4.2%
Per Person Per Day Spending	\$198.6	\$198.3	2%
Total Air Seats <sup>†††</sup>	8,086,040	6,090,900	-0.1%

KAUAI	2016 FINAL	2017 YTD*	% CHANGE YTD*
Visitor Expenditures	\$1.67B	\$1.39B	10.1%
Visitor Arrivals	1,187,269	963,752	7.3%
Per Person Per Day Spending	\$183.8	\$193.0	4.7%
Total Air Seats <sup>†††</sup>	702,222	558,158	3.1%

ISLAND OF HAWAII	2016 FINAL	2017 YTD*	% CHANGE YTD*
Visitor Expenditures	\$2.09B	\$1.78B	16.4%
Visitor Arrivals	1,549,943	1,316,865	13.5%
Per Person Per Day Spending	\$179.6	\$185.5	4.7%
Total Air Seats <sup>†††</sup>	897,451	760,530	11.3%



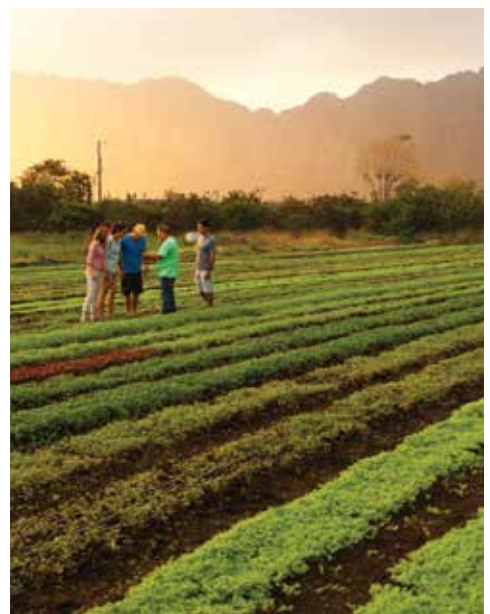


MAUI	2016 FINAL	2017 YTD*	% CHANGE YTD*
Visitor Expenditures	\$4.52B	\$3.55B	3.8%
Visitor Arrivals	2,634,237	2,055,771	3.2%
Per Person Per Day Spending	\$210.9	\$216.4	1.6%
Total Air Seats <sup>†††</sup>	2,334,832	1,756,157	-0.7%

MOLOKA'I	2016 FINAL	2017 YTD*	% CHANGE YTD*
Visitor Expenditures	\$32.9M	\$24.9M	10.8%
Visitor Arrivals	58,932	42,726	-4.9%
Per Person Per Day Spending	\$115.2	\$123.8	15.0%

LĀNA'I	2016 FINAL	2017 YTD*	% CHANGE YTD*
Visitor Expenditures	\$91.7M	\$58.4M	-6.7%
Visitor Arrivals	63,024	47,815	1.4%
Per Person Per Day Spending	\$414.6	\$373.8	-3.8%

\* January-September 2017  
 \*\* % Change 2016 Final vs 2017 Forecast  
 \*\*\* Includes Supplemental Business Expenditures  
 † Air and Cruise Only  
 †† Does Not Include Charter Air Seats  
 ††† Source: Scheduled Seats from Diio Schedules





# HAWAII VISITOR STATISTICS GLOBAL SOURCE MARKETS

Source for All Tables: Hawaii's Tourism Authority

U.S. WEST	2016 FINAL	2017 FORECAST	% CHANGE*	2017 YTD**	% CHANGE YTD**
Visitor Expenditures	\$5.63B	\$6.06B	7.6%	\$4.60B	10.5%
Visitor Arrivals	3,664,150	3,748,097	2.3%	2,864,784	4.4%
Per Person Per Day Spending	\$167.9	\$176.8	5.3%	\$177.5	6.7%
Total Air Seats***	7,324,285	7,332,706	0.1%	5,497,346	-1.3%

U.S. EAST	2016 FINAL	2017 FORECAST	% CHANGE*	2017 YTD**	% CHANGE YTD**
Visitor Expenditures	\$3.89B	\$4.16B	6.9%	\$3.27B	10.4%
Visitor Arrivals	1,892,768	1,960,448	3.6%	1,535,934	5.7%
Per Person Per Day Spending	\$201.7	\$208.9	3.6%	\$210.1	5.3%
Total Air Seats***	923,602	1,008,610	9.2%	772,805	12.4%

JAPAN	2016 FINAL	2017 FORECAST	% CHANGE*	2017 YTD**	% CHANGE YTD**
Visitor Expenditures	\$2.10B	\$2.28B	8.9%	\$1.68B	11%
Visitor Arrivals	1,487,979	1,568,750	5.4%	1,175,174	6.7%
Per Person Per Day Spending	\$240.3	\$244.9	1.9%	\$238.2	2.4%
Total Air Seats***	1,835,718	1,986,359	8.2%	1,506,445	9.7%

CANADA	2016 FINAL	2017 FORECAST	% CHANGE*	2017 YTD**	% CHANGE YTD**
Visitor Expenditures	\$954.9M	\$1.04B	8.9%	\$748.8M	9.8%
Visitor Arrivals	469,314	505,127	7.6%	367,655	9.6%
Per Person Per Day Spending	\$161.1	\$163.5	1.5%	\$163.3	2.0%
Total Air Seats***	462,845	462,889	0.0%	335,379	-3.5%

OCEANIA	2016 FINAL	2017 FORECAST	% CHANGE*	2017 YTD**	% CHANGE YTD**
Visitor Expenditures	\$1.07B	\$1.02B	-4.7%	\$758.5M	-4.0%
Visitor Arrivals	390,364	389,953	-0.1%	291,500	-0.2%
Per Person Per Day Spending	\$286.5	\$271.7	-5.2%	\$271.7	-4.7%
Total Air Seats***	514,641	483,041	-6.1%	360,884	-8.4%



\* % Change 2016 Final vs 2017 Forecast  
 \*\* January-September 2017  
 \*\*\* Source: Scheduled Seats from Diio Schedules

<b>KOREA</b>	2016 FINAL	2017 FORECAST	% CHANGE*	2017 YTD**	% CHANGE YTD**
Visitor Expenditures	\$585.3M	\$508.0M	-13.2%	\$363.7M	-11.3%
Visitor Arrivals	257,189	244,741	-4.8%	178,382	-2.6%
Per Person Per Day Spending	\$316.4	\$286.4	-9.5%	\$278.2	-9.1%
Total Air Seats***	375,920	385,274	2.5%	264,872	-5.5%

<b>CHINA</b>	2016 FINAL	2017 FORECAST	% CHANGE*	2017 YTD**	% CHANGE YTD**
Visitor Expenditures	\$416.4M	\$392.8M	-5.7%	\$305.8M	-10.0%
Visitor Arrivals	164,326	158,938	-3.3%	122,425	-9.0%
Per Person Per Day Spending	\$384.7	\$333.2	-13.4%	\$328.6	-14.6%
Total Air Seats***	166,916	164,084	-1.7%	123,535	-1.6%

<b>TAIWAN</b>	2016 FINAL	2017 FORECAST	% CHANGE*	2017 YTD**	% CHANGE YTD**
Visitor Expenditures	\$38.1M	\$37.2M	-2.5%	\$28.5M	-9.8%
Visitor Arrivals	18,107	18,535	2.4%	14,324	1.9%
Per Person Per Day Spending	\$264.9	\$252.9	-4.5%	\$257.4	-9.4%
Total Air Seats***	32,408	31,186	-3.8%	22,916	-1.2%

<b>EUROPE</b>	2016 FINAL	2017 FORECAST	% CHANGE	2017 YTD**	% CHANGE YTD**
Visitor Expenditures	\$353.4M	\$331.1M	-6.3%	\$219.8M	-18.5%
Visitor Arrivals	143,922	140,377	-2.5%	106,359	-4.0%
Per Person Per Day Spending	\$189.9	\$177.3	-6.6%	\$159.3	-15.9%

<b>SOUTHEAST ASIA</b>	2016 FINAL	2017 FORECAST	% CHANGE*	2017 YTD**	% CHANGE YTD**
Visitor Arrivals	21,127	-	-	20,794	28.6%

<b>HONG KONG</b>	2016 FINAL	2017 FORECAST	% CHANGE*	2017 YTD**	% CHANGE YTD**
Visitor Arrivals	4,511	-	-	2,962	-18.5%

Note: Hawai'i data related to visitor expenditures, per person per day spending, and total air seats is not available for the Southeast Asia and Hong Kong markets.





## BRAND EXPERIENCE PROGRAM LISTINGS

### KŪKULU OLA PROGRAM

#### O'AHU

Bernice Pauahi Bishop Museum:  
Hulia 'Ano - Inspired Patterns  
Hawaiian Mission Houses: Nani Ke Ao Nei,  
A Music Series  
Hi'ipaka LLC: Nā Po'e Hana No'eau  
(Waimea Valley Visiting Artist Program)  
Ho'okua'āina: Kūkuluhou Internship Program  
Kalihi-Pālama Culture and Arts Society Inc.:  
Queen Lili'uokalani Keiki Hula Competition  
Nā'ālehu Theatre: Hawaiian Music Masters  
Youth Outreach and Community Reinvestment  
Paepae o He'eia: Kū Hou Kuapā  
Searider Productions Foundation: Family  
Ingredients (Mālama-Themed Programming)  
The Estria Foundation: Mele Murals  
Waimānalo Canoe Club: Wa'a Koa Restoration  
Waimānalo Market Co-op:  
Ka Mea 'Ai Pono - A Wellness Initiative

#### MAUI COUNTY

Hāna Arts: Hāna Legends  
Hōlani Hāna Inc.: Ho'omau I Ka Hale Kahiko  
Hui No'eau Visual Arts Center:  
Art with Aloha 2017  
Ka Honua Momona: Ke Alaula 'Ohana  
Workshops  
Lāna'i Culture and Heritage Center: E 'Ike  
Hou iā Lāna'i Cultural Literacy Initiative  
Ma Ka Hana Ka 'Ike, Hoi iā Hāloa  
Maui Arts and Cultural Center:  
Celebrate Hawai'i  
Moloka'i Arts Center Inc.: Hawaiian Arts  
HA Program  
Nā Leo Pūlama O Maui Inc.: A Living  
Hawaiian Language - It's Our Kuleana

#### KAUA'I

Kumano I Ke Ala: Ma Uka Eco-Village Experience  
National Tropical Botanical Garden:  
E Ho'i Hou O Hāloa: Returning Lo'i  
to Lāwa'i Ahupua'a

#### ISLAND OF HAWAII

Edith K. Kanaka'ole Foundation:  
Hale Ho'okipa  
Hawai'i Forest Institute: Ka Pilina Poina 'Ole -  
Connection Not Forgotten  
Kohala Institute: KI Tours - Kauhale Tours and  
Workshops

Laupāhoehoe Train Museum: Hawaiian  
Cultural Center of Hāmākua  
Nā Kālai Wa'a: Hanauna Ola - Sustaining  
the Generations Through Voyaging  
Pōhāhā I Ka Lani: Mālama Nāpo'opo'o  
Pōhāhā I Ka Lani: Hō'ola Iā Koa'eke

#### VARIOUS

Makauila Inc.: The Great Navigators of  
Island Earth  
Mana Maoli: The Mana Mele Project

### ALOHA 'ĀINA PROGRAM

#### O'AHU

Kōkua Kalihi Valley Comprehensive Family  
Services: Koa 'Āina Environmental  
Stewardship Project  
Hawai'i Forest Institute: Honolulu Zoo  
Children's Discovery Forest  
Hawai'i Marine Mammal Alliance Inc.:  
Stewardship of the Hawaiian Monk Seal  
Hika'alani: Ho'okanaka  
Mālama Na Honu Conservation and  
Preservation Project 2017  
Maunaloa Fishpond Heritage Center:  
Kānewai Spring Preservation  
Pacific American Foundation Hawai'i Inc.:  
Kahuliau 'Elua  
Surfrider Foundation O'ahu Chapter:  
Ocean Friendly Restaurants Hawai'i  
travel2change Aloha 'Āina Program  
Waimānalo Canoe Club: Adopt a Park

#### MAUI COUNTY

Hawai'i Wildlife Fund: Ho'okipa Honu  
Ho'okuleana: A Community-Based  
Educational Outreach  
Ka Honua Momona: Mālama I Nā Loko  
l'a O Moloka'i  
Ma Ka Hana Ka 'Ike Building Program:  
Mālama Ka Waihona 'Āina O Hāna  
Maui Nui Botanical Gardens Inc.: Seed  
Storage of and Increased Community  
Access to Traditional Hawaiian Plants  
Moloka'i Land Trust: Habitat Improvements  
for Laysan Albatross at the Mokio Preserve  
Pacific Whale Foundation: Informing,  
Educating and Involving the Public in  
Restoration of Paniaka Wetlands  
Save Honolua Coalition: Mālama Honolua  
Tri-Isle Resource Conservation and  
Development Council Inc.: Leeward Haleakalā  
Watershed Restoration Partnership

University of Hawai'i, Office of Research  
Services: Early Detection and Rapid Response  
to Invasive Species Along Trails

#### KAUA'I

Kōke'e Resource Conservation Program  
Ecotourism Volunteers of Kōke'e  
Kumano I Ke Ala: Aloha 'Āina  
Restoration Project  
Tourism Improvements at Makauwahi  
Cave Reserve  
National Tropical Botanical Garden: Making  
the Canoe Garden Path ADA Accessible  
The Trust for Public Lands: The Kuleana  
Lands of Waipā  
University of Hawai'i, Office of Research  
Services: Kiaimoku - Bridging the Gap  
between Communities and Conservation

#### ISLAND OF HAWAII

Big Island Resource Conservation and  
Development Council: Community-Led  
Invasive Species Control  
Kalanihale: 'Āina Momona: Perpetuating  
Abundant and Healthy Marine Resources  
The Marine Mammal Center: Hawaiian Monk  
Seal Conservation and Education Program

#### VARIOUS

The Nature Conservancy: Protecting the  
Heart of Hawai'i's Natural Resources  
University of Hawai'i Rapid 'Ōhi'a Death  
Seed-Banking Initiative

### COMMUNITY ENRICHMENT PROGRAM

#### O'AHU

City and County of Honolulu Department of  
Parks and Recreation: Lei Day Celebration  
Hawai'i Book and Music Festival  
Hawai'i European Cinema Film Festival  
Hawai'i Forest Industry Association: 2017  
Hawai'i's Woodshow, Na La'au o Hawai'i  
Hawai'i Korean Chamber of Commerce:  
16th annual Korean Festival  
Hawaiian Mission Houses: History Theatre  
Japanese Cultural Center of Hawai'i:  
New Year's 'Ohana Festival/Shichi-Go-San:  
Keiki Kimono Dressing  
Kāne'ohe Business Group:  
Windward Ho'olaule'a  
Kī Hō'alu Foundation Inc.: 35th annual  
Hawaiian Slack Key Guitar Festival -  
Waikiki Style  
Maui Jim Inc.: Maui Jim Ocean Racing Series

O'ahu Resource Conservation and Development Council: Parade of Farms - Cultivating Community on the North Shore

SJ Foundation: 15th annual Waikīkī Spam Jam

47th annual 'Ukulele Festival Hawai'i

University of Hawai'i, Office of Research Services: Asia Pacific Dance Festival

Waikīkī Community Center:

Duke Kahanamoku Beach Challenge

## MAUI COUNTY

Aha Kukui o Moloka'i: Moloka'i Canoe Festivals Kulāia

Arts Education for Children Group: Ninth annual Maui Steel Guitar Festival

Arts Education for Children Group: Jazz Maui East Meets West 2017

Hawaiian Kamali'i Inc.: The Pailolo Challenge

Hui No'eau Art Exhibitions 2017

Japanese Cultural Society of Maui: Maui Matsuri, A Japanese Festival

Kī Hō'alu Foundation Inc.: 26th annual Hawaiian Slack Key Guitar Festival - Maui Style

Kristie Wrigglesworth: World Whale Day

Maui Arts and Cultural Center: Maui 'Ukulele Festival

Maui Arts and Cultural Center, Schaefer International Gallery: 2017 Visual Arts Exhibition

Maui Bicycling League: Love the West Maui Greenway Day

Maui Classical Music Festival 2017

Maui Historical Society / Hale Hō'ike'ike at the Bailey House: E Pūlama Mau lā Maui

Maui Jim Inc.: Maui Jim Ocean Racing Series

Maui Pops Orchestra 2017

Nāpili Kai Foundation: Ku'u Pua Mae'ole - Celebrating 50 Years

Pailolo SUP Sports LLC: Maui SUP Cup

Lahaina Restoration Foundation: Four Chinese Festivals

Tri-Isle Resource Conservation and Development Council Inc.: Emma Farden Sharpe Hula Festival

Tri-Isle Resource Conservation and Development Council Inc.: Wailuku First Friday

USTA Hawai'i Pacific Section: 2017 Tennis Championship of Maui

## KAUA'I

Friends of the Festival of Lights

Garden Island Arts Council: E Kanikapila Kākou 2017 - New Faces at EKK

Hanapēpē Economic Alliance: Celebrating 20 Years of Hanapēpē Art Night - All Year Long

Hanapēpē Economic Alliance: Kaua'i Chocolate and Coffee Festival

Hawai'i Institute for Music Enrichment and Learning Experiences: Steel Guitar Festivals

Hui o Laka: Eō E 'Emalani I Alaka'i 2017

Ka Hale Pono Inc.: Seventh annual Anahola Prince Kūhiō Day Celebration

Ka 'Imi Na'auao O Hawai'i Nei Institute: Heiva I Kaua'i 2017

Kapa'a Business Association: Coconut Festival

Kaua'i Economic Development Board: The Keeper of the Culture: E Ola Na Mo'olelo

Kaua'i Museum Association Ltd.:

May Day Lei Contest

Kaua'i Outrigger Association: 20th anniversary Nāpali Challenge

Kaua'i Powwow Council: 19th annual Kaua'i Powwow in Paradise

Kī Hō'alu Foundation Inc.: 26th annual Hawaiian Slack Key Guitar Festival - Kaua'i Style

Mālie Foundation: 2017 Hawaiian Cultural Events and Kaua'i Mokihana Festival

Maui Jim Inc.: Maui Jim Ocean Racing Series

National Tropical Botanical Garden: Remains of the Rainbow: Two Exhibitions of Rare Plant Photography

Po'ipū Beach Foundation: New Year's Eve Celebration at Po'ipū Beach Park

Po'ipū Beach Foundation: Po'ipū Food and Wine Festival

Tasting Kaua'i LLC: Tasting Kaua'i Food Tours

## ISLAND OF HAWAII'

Big Island Resource Conservation and Development Council: Ka'ū Coffee Festival

Endurance Events USA:

Mauna to Mauna Ultra

Hāmākua Harvest Annual Farm Festival

Hawai'i Institute for Music Enrichment and Learning Experiences: Steel Guitar Festivals

Second annual Hawai'i Island Festival of Birds

Hawai'i Performing Arts Festival: Marketing Development Project HawaiiCon 2017

Kahilu Theatre Foundation: second half of 36th presenting season, first half of 37th presenting season

Kalani Honua: Hawai'i Yoga Festival

Kona Hawaiian Quilt Museum Society: Tropical Inspiration Quilt Show

Kona Historical Society: Hands on History at the Kona Coffee Living History Farm

Peoples Advocacy for Trails Hawai'i (PATH): Expanding Awareness of Bikeshare - A Vehicle for Visitor Health

Volcano Art Center: Hula Arts at Kīlauea

Zonta Club of Hilo Foundation: Zonta Fashion Frenzy

## SIGNATURE INCUBATOR PROGRAM

### O'AHU

Honolulu Biennial

Moloka'i 2 O'ahu Paddleboard World Championships

Sunset Beach Pro

### MAUI COUNTY

Celebration of the Arts

### KAUA'I

2017 Waimea Town Celebration: Heritage of Aloha Festival

### ISLAND OF HAWAII'

25th annual Pana'ewa Stampede Rodeo

### STATEWIDE

Maoli Arts Movement (O'ahu and Maui)

## NATURAL RESOURCES ADVISORY GROUP

Mark Fox

*The Nature Conservancy of Hawai'i*

Tanya Rubenstein

*Department of Land and Natural Resources*

Annette Ka'ohelau'i

*Hawai'i Ecotourism Association*

Vincent Shigekuni

*PBR Hawai'i and Associates Inc.*

T. 'Aulani Wilhelm

*Papahānaumokuākea Marine National Monument*

Marti Townsend

*Sierra Club of Hawai'i*

## HAWAII' 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

*The Kohala Center*

Debbie Nākanelua-Richards

*Hawaiian Airlines*



# PROGRAM/PROJECT CONTRACT LISTING

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

Korea external major market management – CON 15010:  
I Plus Connect Communications (dba iConnect)

Calculation of visitor characteristics and expenditures – CON 15011:  
SMS Research and Marketing Services Inc.

PGA Tour – CON 15020: PGA Tour Inc.

IRONMAN World Championship – CON 15061: World Triathlon Corporation

Europe external major market management – CON 16023:  
Hills Balfour Limited

Oceania external major market management – CON 16024:  
The Walshe Group Pty Ltd.

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

China external major market management – CON 16039:  
The Happy Traveller LLC (dba Brandstory Inc. PTE Ltd.)

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 –  
CON 16071: Hawai'i Visitors and Convention Bureau

Island Chapters support services – CON 17002:  
Hawai'i Visitors and Convention Bureau

Canada external major market management – CON 17017:  
VoX International Inc.

Japan external major market management – CON 17028: a.Link LLC

USA external major market management – CON 17029:  
Hawai'i Visitors and Convention Bureau

## PROCUREMENT OVER \$100,000 FOR CALENDAR YEAR 2017

Korea external major market management – CON 15010:  
I Plus Connect Communications (dba iConnect)

Calculation of visitor characteristics and expenditures – CON 15011:  
SMS Research and Marketing Services Inc.

Europe external major market management – CON 16023:  
Hills Balfour Limited

Oceania external major market management – CON 16024:  
The Walshe Group Pty Ltd.

China external major market management – CON 16039:  
The Happy Traveller LLC (dba Brandstory Inc. PTE Ltd.)

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 –  
CON 16071: Hawai'i Visitors and Convention Bureau

Island Chapters support services – CON 17002:  
Hawai'i Visitors and Convention Bureau

L.A. Clippers – CON 17009: L.A. Clippers LLC

Delta Hawai'i award rebates – CON 17012: Delta Air Lines

Canada external major market management – CON 17017:  
VoX International Inc.

Hawai'i Investment Ready – CON 17018: The Waipā Foundation

USTA Fed Cup 2017 – CON 17021: USTA Hawai'i Pacific Section

Global Social Media Program – CON 17023: Wahine Media

2016 Hawai'i Tourism Conference, Executive Summit – CON 17027:  
Hawai'i Visitors and Convention Bureau

Japan external major market management – CON 17028: a.Link LLC

USA external major market management – CON 17029:  
Hawai'i Visitors and Convention Bureau

Visitor Assistance Program, O'ahu – CON 17031:  
Visitor Aloha Society of Hawai'i

Visitor Assistance Program, island of Hawai'i – CON 17032:  
Visitor Aloha Society of Hawai'i, island of Hawai'i

Public relations, communication and outreach – CON 17036:  
Anthology Marketing Group

Honolulu Festival – CON 17054: Honolulu Festival Foundation

38th annual Pan-Pacific Festival – CON 17055:  
Kintetsu International Hawaii Company

Executive production of 2017 Global Tourism Summit – CON 17061:  
Paragon Events

Global Tourism Summit cost reimbursables – CON 17062: Paragon Events

Hawaii International Film Festival – CON 17064:  
Hawaii International Film Festival Inc.

Hawai'i Food and Wine Festival – CON 17068:  
Hawai'i Food and Wine Festival

Hawai'i Bowl/Hawaiian Airlines Diamond Head Classic – CON 17088:  
ESPN Productions Inc.

LOTTE Championship – CON 17187: Ladies Professional Golf Association

Aloha Festivals – CON 17191:  
Aloha Week Hawai'i Inc. (dba Aloha Festivals)

Statewide Junior Lifeguard Program – CON 17208:  
North Shore Lifeguard Association

Design and Maintenance of HTA Website – CON 17214:  
Anthology Marketing Group

Ellison Onizuka Kona International Airport at Keāhole-Haneda Airport route –  
CON 17216: Hawaiian Airlines Inc.

Kūhiō Beach Hula Mound – CON 17217: Waikīkī Improvement Association

Kuala Lumpur-Osaka-Honolulu route incentive program – CON 17222:  
AirAsia X Berhad

Mele Mei 2017 – CON 17223: Hawai'i Academy of Recording Arts

Hawai'i air service development, U.S. market opportunities – CON 17226:  
Hawai'i Visitors and Convention Bureau

Customer service and tour guide certification – CON 17227:  
University of Hawai'i, Kapi'olani Community College

Ala Wai Watershed Partnership 2017 – CON 17233:  
O'ahu Economic Development Board

Native Hawaiian Hospitality Association 2017 – CON 17234:  
Native Hawaiian Hospitality Association

## THE HTA TEAM SUPPORTING HAWAII'S TOURISM INDUSTRY



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

Randy Baldemor, *Chief Operating Officer*

Leslie Dance, *Vice President, Marketing and Product Development*

Marc Togashi, *Vice President, Finance*

Caroline Anderson, *Tourism Brand Manager*

Maile Carvalho, *Finance Administrative Assistant*

Charlene Chan, *Director of Communications*

Jennifer Chun, *Director of Tourism Research*

Minh-Chau Chun, *Tourism Research Manager*

Jadie Goo, *Director of Marketing*

Laci Goshi, *Tourism Brand Manager*

Carole Hagihara, *Executive Assistant*

Denise Kahalekulu, *Quality Assurance Administrative Assistant*

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

Lawrence Liu, *Tourism Research Statistician*

Chika Miyauchi, *Tourism Brand Manager*

Ronald Rodriguez, *Contracts Specialist*

Chris Sadayasu, *Tourism Brand Manager*

Michele Shiowaki, *Administrative Assistant*

Noriko Sloan, *Operations Manager*

Vengie Talaro, *Administrative Assistant*



# 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

Follow us on Twitter @HawaiiHTA

Like us on Facebook  
[www.facebook.com/HawaiiHTA](http://www.facebook.com/HawaiiHTA)

Follow us on Instagram @hawaiihta

Subscribe to our YouTube channel  
[www.youtube.com/HawaiiHTA](http://www.youtube.com/HawaiiHTA)