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David Y. Ige
Governor
John De Fries
President and Chief Executive Officer

DEPT. COMM. NO. 247

December 28, 2021

The Honorable Ronald D. Kouchi,
President and Members
of the Senate
Thirty-First State Legislature
State Capitol, Room 409
Honolulu, Hawaii 96813

The Honorable Scott K. Saiki,
Speaker and Members of the
House of Representatives
Thirty-First State Legislature
State Capitol, Room 431
Honolulu, Hawaii 96813

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

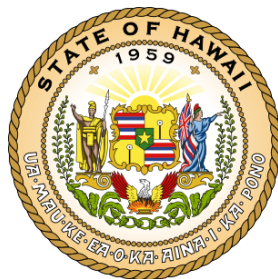
For your information and consideration, I am transmitting a copy of the Hawai'i Tourism Authority's (HTA) 2021 Annual Report, as required by Section 201B-16, Hawaii Revised Statutes. In accordance with Section 93-16, Hawaii Revised Statutes, the HTA's annual report may be viewed electronically at: <http://dbedt.hawaii.gov/overview/annual-reports-reports-to-the-legislature/>.

With aloha,

John De Fries
President & CEO

Enclosure

c: Legislative Reference Bureau



2021 Annual Report

to the

**Hawai'i State
Legislature**

Regular Session of 2022

Prepared by
Hawai'i Tourism Authority
Department of Business, Economic
Development & Tourism
State of Hawai'i
December 2021

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

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Letter from the President & CEO

Aloha kākou,

Transformation. Adaptation. Resilience. This year has been a critical time of huliau (transformative change) for our community, our visitor industry, and the Hawai'i Tourism Authority (HTA). It marks an important turning point focused on **Mālama Ku'u Home** (caring for my beloved home), pivoting toward a more regenerative model of tourism that balances economics with the wellbeing of our communities and natural resources, and a new path forward to a better and more sustainable future for all of Hawai'i.

It is in this spirit that HTA proudly presents our 2021 Annual Report, including programs and activities conducted from January through October 2021.

This year our board adopted the community-led Destination Management Action Plans (DMAP) for each of Hawai'i's four counties. The DMAPs are being implemented in coordination with the community, visitor industry, and other state, county, and federal agencies. In July we realigned HTA's operations with our Strategic Plan to better support its four interacting pillars – natural resources, Hawaiian culture, community, and brand marketing.

The ongoing COVID-19 pandemic and emergence of variants continue to stymie our state's recovery. However, increased vaccination rates, the Safe Travels program, and the vigilance of our industry and community helped to keep kama'āina safe. In the first 10 months of 2021, total visitor spending was \$10.16 billion and a total of 5,410,436 visitors arrived in Hawai'i, driven by the U.S. domestic market.

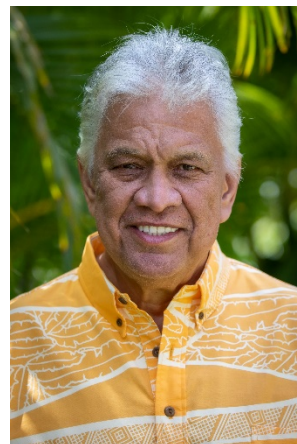
Your continued support of HTA through these uncertain times with American Rescue Plan funding is appreciated, and we also appreciate the tough decisions you will need to make in the 2022 session. As we look toward the continued recovery of the visitor industry, our priority remains on visitor education and balance toward meaningful recovery for our community.

Hawai'i deserves nothing less than a tourism industry that is regenerative, accomplished by everyone's individual and collective efforts. Mahalo for your trust, your continued support, and your collaboration in serving the people of Hawai'i.

Mālama pono.



John De Fries
President & CEO
Hawai'i Tourism Authority



Board of Directors (as of December 2021)

<i>Members</i>	<i>Representation</i>
George Kam, Chair <i>Ambassador of Aloha</i>	At-Large
David Z. Arakawa, 1st Vice Chair <i>Executive Director</i> Land Use Research Foundation of Hawai'i	At-Large
Kimi Yuen, 2nd Vice Chair <i>Principal/Planner</i> PBR Hawai'i & Associates, Inc.	At-Large
Micah Alameda <i>Owner & Operator</i> Alamedia LLC	County of Hawai'i
Fred Atkins <i>Managing Partner</i> Kaua'i Kilohana Partners	County of Kaua'i
Dylan Ching <i>Vice President of Operations</i> T S Restaurants	City & County of Honolulu
Daniel Chun <i>Sales, Community & Public Relations</i> <i>Director – Hawai'i</i> Alaska Airlines	At-Large
Keone Downing <i>General Manager</i> Downing Hawai'i	At-Large
Kyoko Kimura <i>Director - Owner Relations</i> Aqua-Aston Hospitality	County of Maui
Sherry Menor-McNamara <i>President & CEO</i> Chamber of Commerce Hawai'i	At-Large
Benjamin Rafter <i>CEO</i> Springboard Hospitality	At-Large
Sig Zane <i>CEO</i> Sig Zane Designs	Hawaiian Culture
L. Richard Fried, Jr. <i>(term ended 6/30/21)</i> <i>Founding Member</i> Cronin, Fried, Sekiya, Kekina & Fairbanks, Attorneys At Law	City & County of Honolulu
Ku'uipo Kumukahi <i>(term ended 6/30/21)</i> <i>Hawaiian Culture Manager</i> Hyatt Regency Waikiki	Hawaiian Culture

	<i>Representation</i>
Kelly Sanders <i>(term ended 6/30/21)</i> <i>Vice President of Operations</i> Highgate	At-Large

Staff (as of December 2021)

John De Fries	President and Chief Executive Officer
Keith Regan	Chief Administrative Officer
Kalani Ka'anā'anā	Chief Brand Officer
Marc Togashi	Vice President of Finance
Caroline Anderson	Director of Planning
Maile Carvalho	Administrative Assistant, Accounting
Maka Casson-Fisher	Brand Manager
Tracey Fermahin	Administrative Assistant, Contracts
T. Ilihia Gionson	Public Affairs Officer
Jadie Goo	Senior Brand Manager
Laci Goshi	Brand Manager
Carole Hagihara-Loo	Executive Assistant
Dede Howa	Brand Manager
'Iwalani Kūali'i Kaho'ohanohano	Senior Brand Manager
Talon Kishi	Budget and Fiscal Officer
Yvonne Lam	Administrative Assistant, Brand
Ronald Rodriguez	Contract Specialist
Michele Shiowaki	Administrative Assistant, Planning
Todd Toguchi	Administrative Assistant, Brand
Ross Willkom	Brand Manager

Overview of the Hawai'i Tourism Authority

The HTA was established in 1998 through a legislative act to serve as the state's lead agency strategically managing tourism, Hawai'i's largest industry. The same act also established the Tourism Special Fund, a dedicated source of funding from the Transient Accommodations Tax (TAT). This dedicated funding source was discontinued through legislation in the 2021 session, and the agency was funded with American Recovery Plan federal funds for FY 2021-22. A funding source for FY 2022-23 will be considered during the Legislature's 2022 session.

In addition to its legal responsibilities outlined in statute, HTA strives to:

- Ensure Hawai'i delivers on its brand promise
- Support efforts to address broad tourism issues
- Lead the visitor industry in supporting a strong economy
- Place the interests and benefits of residents first
- Serve as a source for information on tourism market research
- Educate visitors about traveling responsibly

Our Kuleana

- The HTA's kuleana is to manage tourism for the State of Hawai'i in a way that improves the quality of life for residents, families and communities on all islands.
- The welfare of the Hawaiian Islands, both for today – and especially for the future – is what matters most in how we fulfill HTA's mission. Our overriding objective is for HTA to make a positive, lasting impact for Hawai'i through the tourism industry.
- We are responsible, first and foremost, for protecting the iconic brand of the Hawaiian Islands. This includes perpetuating Hawaiian culture, preserving Hawai'i's natural environment, and strengthening communities by supporting programs kama'āina treasure and visitors enjoy.
- We are also responsible for guiding the direction of Hawai'i tourism to support the economic vitality of the state, and each individual island. Tourism's revenue provides jobs, supports businesses and

Our Mission

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

creates opportunities for kama'āina of all generations to grow and prosper.

Fulfilling Our Mandate

- HTA works closely with other state, county and federal agencies, as well as the tourism industry, to ensure our mission is being fulfilled.
- Enhancing resident sentiment is dependent on kama'āina appreciating the connection between tourism and how we live in Hawai'i. Ensuring that the community understands how tourism supports programs and services that affect their quality of life is critical.
- Kama'āina are vital to the quality of the visitor experience.
- We are completely transparent with how our budget is being utilized and will provide clear information to lawmakers, industry partners, media and the general public as to our funding allocation. Allocations are made after a rigorous vetting process of each line item.
- Our brand marketing efforts are focused on working with contractors in key markets worldwide who share our commitment to attract high value visitors while staying true to Hawai'i's brand. All contractors are retained after going through a detailed RFP process to ensure the brand management and marketing of Hawai'i's brand is being handled by effective, experienced experts whose strategies, tactics and mindset are aligned with HTA's kuleana.

Change Management Plan

As the HTA moved forward with its 2020-2025 Strategic Plan and DMAPs, a new way of thinking and new approach was needed to better utilize the limited available resources. A full examination of the organization including its core responsibilities, critical functions, human resources, finances, policies, and procedures was conducted to prepare for a significant shift in direction. The arrival of the HTA's President & CEO, John De Fries, in September 2020, led to the formation of a new vision and direction that aligned with the HTA's 2025 Strategic Plan and incorporated the overarching principles of Mālama Ku'u Home (Caring for My Beloved Home). By December 2020, the organization had begun the process of internalizing the concepts of Mālama Ku'u Home and was developing a strategy to implement the new direction. This was the start of what would eventually be termed the "Change Management Plan."

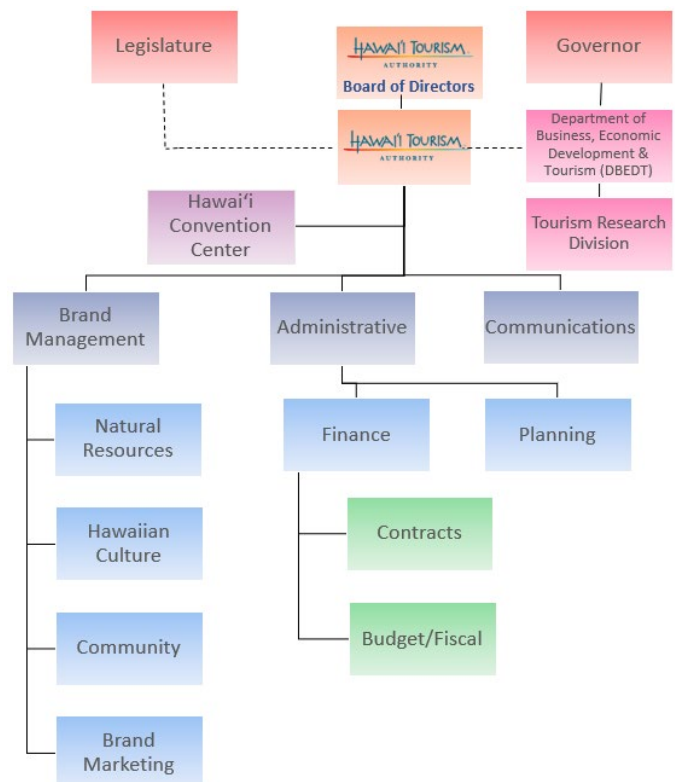
The 2021 Legislative Session caused the rollout of Mālama Ku'u Home and the Change Management Plan to be delayed due to the session being extremely active related to the industry and, more specifically, the HTA. Numerous pieces of legislation were introduced and considered during the session but one, in particular, H.B. 862 H.D. 2 S.B. 2 C.D. 1, had a significant impact in the HTA's funding and funding source (Tourism Special Fund), removed critical functions (research), reduced essential positions, and eliminated the procurement exemption.

During the HTA board meeting on June 24, 2021, the board of directors approved Papahana Ho'okele Huliau, HTA's Change Management Plan as mandated by Resolution 2020-2-1 which took effect on May 27, 2021. In alignment with HTA's 2025 Strategic Plan, Papahana Ho'okele Huliau set forth the important framework for a newly reorganized HTA that will be best equipped to achieve its overarching goal of Mālama Ku'u Home (caring for my beloved home) through the principles of regenerative tourism. To accomplish this, HTA reorganized its structure and operations to become a more effective destination management organization.

Operations

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

HTA Functional Structure



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

Adopted by the HTA Board in January 2020, the HTA's 2025 Strategic Plan serves as the guiding document for decision-making and the overall direction for the Authority. As part of the development of the strategic plan, HTA traveled throughout the state to engage the community and seek input to help inform the new plan. During this process, valuable feedback was received from residents including the desire by the community to have a greater voice in the shaping the direction of tourism.



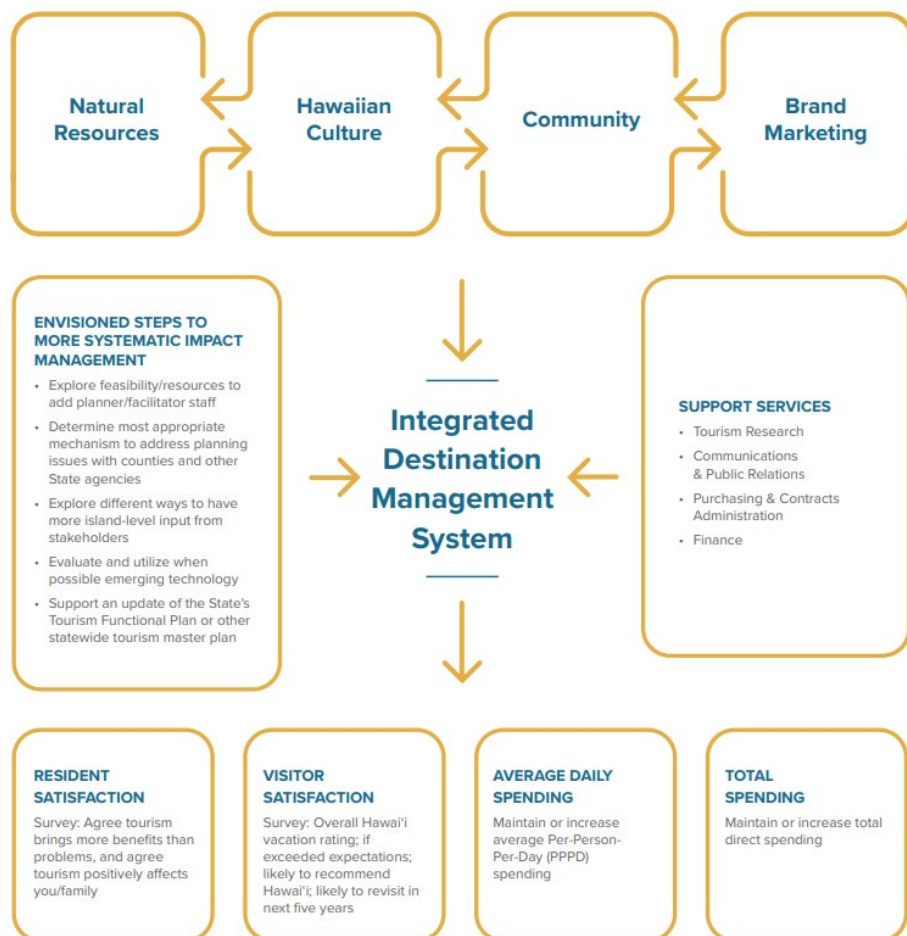
increase in visitor arrivals (pre-pandemic) impacted Hawai'i's natural resources and communities. As such, the 2025 Strategic Plan identifies destination management as "the heart" of the update.

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

The four Key Performance Indicators identified in the plan are: Resident Satisfaction, Visitor Satisfaction, Average Daily Spending, and Total Spending. HTA continuously monitors these measures.

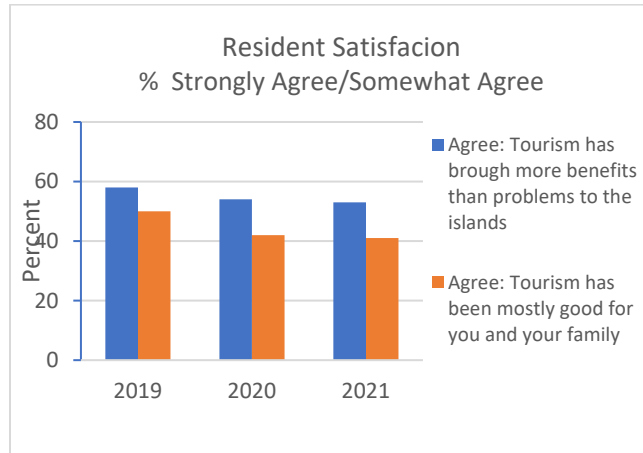
The HTA is determined to ensure that its 2025 strategic plan continues to remain embedded in our decision making and actions.

The plan recognizes that Hawai'i tourism is at a point the requires rebalancing of priorities as the



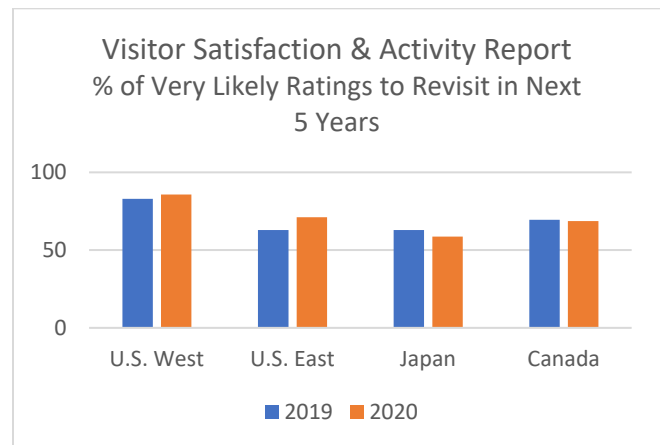
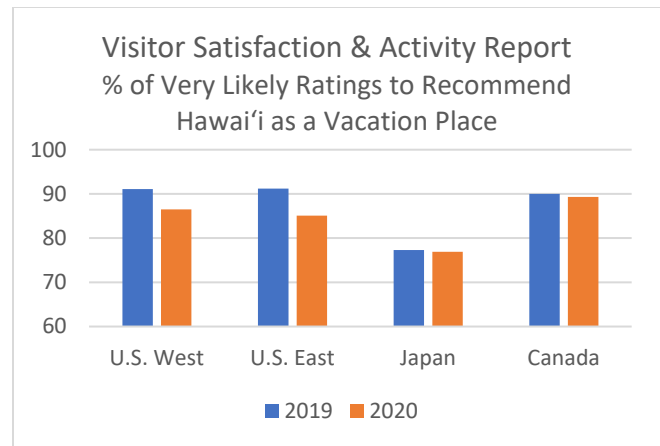
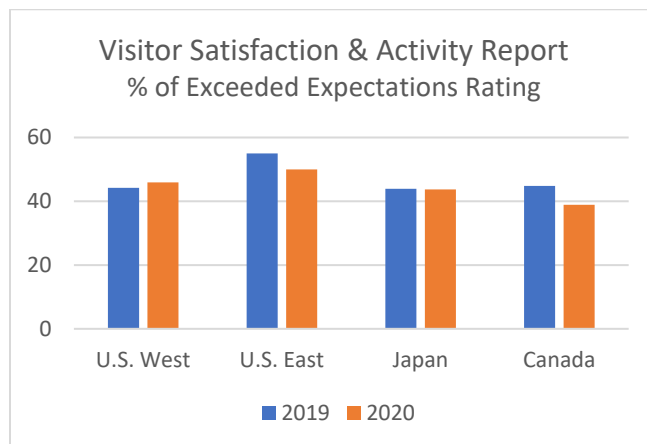
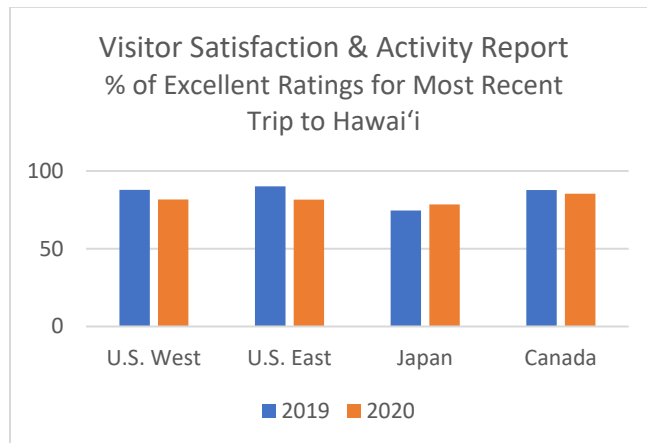
2025 Strategic Plan's Key Performance Indicators

Quality of Life Indicator – Resident Satisfaction



Source: HTA Resident Sentiment Survey conducted by OmniTrak Group.

Experience Indicator – Visitor Satisfaction



Source: HTA Visitor Satisfaction & Activity Report conducted by Anthology Research.

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

Statewide	2019	2020	2021 Forecast	2021 YTD (Oct)
Visitor Expenditures (\$mil.)	\$17,844.3	NA	\$12,686	\$9,033.60
Per-Person Per-Day Spending	\$196.1	NA	\$195.1	\$192.9

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

2021 Forecast: DBEDT 4th Quarter 2021 forecast dated Nov 30, 2021.

Destination Management Action Plans Progress

In mid-2020, the HTA launched a new initiative designed to provide a voice to the community in an effort to rebuild, redefine, and reset the direction of tourism. This new initiative became known as the Destination Management Action Plans (DMAPs) which, once completed, would assist in the stabilization, recovery, and rebuilding of the desired visitor industry for each island. DMAPs were created for each island through steering committees made up of residents of those islands in addition to sectors ranging from the visitor industry, natural resources, Hawaiian culture, nonprofits and other sectors like agriculture and technology. The community-developed DMAPs are a roadmap for the HTA as we implement the plans' hundreds of actions and sub-actions.

The DMAPs were released to the public over the course of the first 8 months of the year. These three-year action plans are divided into 3 phases or years. Movement has been made on each of the DMAPs and funding allocated to ensure actions are being worked on. Summer and Fall progress reports have been issued to show how each DMAP is progressing. The HTA also contracted with the Hawai'i Visitors & Convention Bureau and its island chapters help move DMAPs' actions forward, including providing for a Destination Manager in each Chapter to coordinate and implement actions with HTA.

The actions are not only being moved by the HTA, but through partnerships with various county, state and federal agencies, in addition to other businesses and non-profits.

Destination Management Action Plans Timeline - 2021

February 2

Kaua'i Destination Management Action Plan released to the public.



April 1

Hawai'i Island Destination Management Action Plan released to the public.



August 16 - November 15

HTA-funded Destination Managers in each of HVCB's Island Chapters to on board to help move DMAP actions forward.



Mid-December

DMAP Fall Progress Reports issued for Kaua'i, Maui, Moloka'i, Lana'i, Hawai'i Island, and O'ahu DMAPs.



March 4

Maui Nui (Maui, Moloka'i, Lana'i) Destination Management Action Plan released to the public.



August 31

O'ahu Destination Management Action Plan released to the public.



Late August

DMAP Summer Progress Reports issued for Kaua'i, Maui, Moloka'i, Lana'i and Hawai'i Island DMAPs.



Kaua'i DMAP

The Kaua'i DMAP was approved by the HTA board at the end of December 2020 and was the first DMAP to be released to the public on February 2. There are 9 anchor actions with 34 sub-actions in phase 1.

34

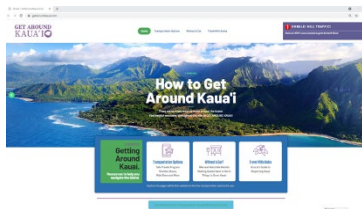
No. of Phase 1 Sub-Actions

74%

Sub-Actions In Progress

2021 Major Highlights:

- The County of Kaua'i's [GetAroundKauai.com](https://www.getaroundkauai.com), a new website, funded by HTA, aims to inform both visitors and residents of the various transportation options available on Kaua'i.
- The County is establishing a retail/networking space, *Alakoko*, for Kaua'i Made products. This is also supported with HTA funding. Soft opening of the space is December 2021.
- The County is working on a new ordinance which allows farmers to sell from their agriculture lands and now value-added agriculture.
- Department of Land and Natural Resources and the state Department of Transportation's Airports and Harbors Divisions partnered to develop a 'Ports of Entry Biosecurity' project for the State of Hawai'i.



18

No. of Phase 1 Sub-Actions

78%

Sub-Actions In Progress

1

No. of Sub-Actions Completed

2021 Major Highlights:

- The Hawai'i Visitors & Convention Bureau relaunched the GoHawaii App.
- Promotion of Hawai'i's sunscreen law to visitors via social media, GoHawaii App, gohawaii.com site.
- HTA convened state, county, and federal agencies and nonprofits examine mitigating visitor impact at Hāna, Maui. Communication pieces were developed and distributed by HTA, Maui Lodging & Hotel Association, and Maui Visitors & Convention Bureau. Maui Police Department also stepped up their presence in the area in the summer. Department of Transportation's Highways Division and Department of Land & Natural Resources State Parks Division also worked in collaboration.
- Maui Visitors & Convention Bureau, Polynesian Adventure and Department of Transportation's Airport Divisions partnered and implemented the "Maui ALOHA Shuttle" Bus which provided for alternative ground transportation option in the summer.



Photo courtesy of Polynesian Adventure Tours

Maui Nui DMAP

The Maui Nui DMAP is comprised of DMAPs for Maui, Moloka'i, and Lāna'i. It was released to the public on March 4.

Maui DMAP

There are 8 anchor actions and 18 sub-actions in phase 1 of which 78% are in progress.

Moloka'i DMAP

There are 6 anchor actions and 11 sub-actions in phase 1. As of November 2021, 64% of the Moloka'i phase 1 sub-actions are in progress.



No. of Phase 1 Sub-Actions



Sub-Actions In Progress

2021 Major Highlights:

- HTA is working with Department of Transportation's Airports Division to develop an Aloha Ambassador Volunteer Program at Moloka'i Airport.
- The County of Maui implemented a program with CARES funds and issued grants to support local businesses. County's Maui Business Resource Center (Maui) and the Kuha'o Business Center (Moloka'i), capacity-building webinars were conducted virtually in Q1 and Q2 of 2021.
- Maui Visitors & Convention Bureau (MVCB) formed an Advisory Group comprised of Moloka'i residents to work on messaging and move other DMAP actions forward.



- MVCB developed rack cards for Mālama Maui County Pledge.
- MVCB formed an Advisory Group comprised of Lāna'i residents to work on messaging and campaigns to drive business to Lāna'i City and support local businesses.

Hawai'i Island DMAP

The Hawai'i Island DMAP was approved in the February HTA board meeting and released to the public on April 1. There are 10 anchor actions with 36 sub-actions in phase 1 of which 86% are in progress.



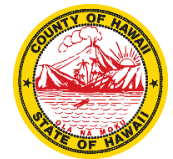
No. of Phase 1 Sub-Actions



Sub-Actions In Progress

2021 Major Highlights:

- HTA partnered with DLNR's Nā Ala Hele Trail and KUPU to pilot a Pololū Trail Steward Program.
- Hawai'i Volcanoes National Park is restoring the original Hawaiian place names to its park maps, apps, and signs.
- The County of Hawai'i issued Request for Proposals for Innovation Grants and Stewardship grants for FY 2021-2022 to move various DMAP actions.



Lāna'i DMAP

There are 9 anchor actions and 23 sub-actions in phase 1 of which 78% are in progress.



No. of Phase 1 Sub-Actions



Sub-Actions In Progress



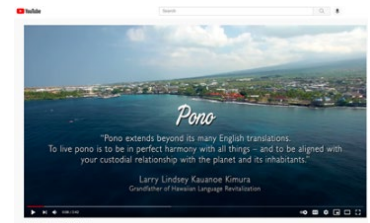
No. of Sub-Actions Completed

2021 Major Highlights:

- HTA provided funding to the Lāna'i Cultural & Heritage Center to enhance their Lāna'i Guide App.
- MVCB installed a digital kiosk on June 29 at Kahului Airport.



- Island of Hawai'i Visitors Bureau invested in the Pono Pledge video created by Hawai'i Island residents.



O'ahu DMAP

The O'ahu DMAP was the final DMAP to be completed. It was approved by the HTA board in July and released to the public in late August. There are 10 anchor actions and 37 sub-actions. Although these actions and sub-actions were finalized after the conclusion of the fiscal year, it is important to note that the implementation phase of the O'ahu DMAP is well underway.



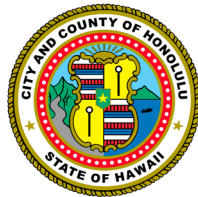
No. of Phase 1 Sub-Actions



Sub-Actions In Progress

2021 Major Highlights:

- The County's Department of Planning & Permitting proposed amendments to Chapter 21 relating to transient accommodations in September. This became Bill 41 which was introduced on October 19. HTA's John De Fries took part in the Mayor's Press Conference in support of this bill and communications on the bill was sent to HTA's database on November 4. It passed first reading on November 10. O'ahu Visitors Bureau also sent out communications to industry/community.
- DLNR is in the process of developing the Statewide Comprehensive Outdoor Recreation Plan (SCORP) which recognizes the various DMAPs. HTA staff met with DLNR and PBR Hawai'i on November 15, 2021, to provide feedback to the draft SCORP.





Natural Resources

Hawai'i's natural resources are some of the most precious in the world, located in Earth's most unparalleled environments and among

Hawai'i's greatest assets as a travel destination. The HTA supports a variety of environmental programs and initiatives in partnership with communities statewide – as well as federal, state and county agencies – to protect Hawai'i's natural resources today and preserve them for future generations.

2021 Major Highlights

- Resumed its partnership with **Sustainable Tourism Association of Hawai'i (STAH)** to protect Hawai'i's unique natural environment and host culture through the promotion of responsible travel and educational programs relating to sustainable tourism for residents, businesses and visitors. Focus is in three areas: 1) a Sustainable Tour Operator Certification Program, 2) Tour Operator/Tour Guide Training Program and 3) Educational Outreach/Partnership Development.
- Partnered with the **Native Hawaiian Hospitality Association (NaHHA)** and the **University of Hawai'i at Mānoa School of Travel Industry Management (TIM)** for a **comprehensive study to understand current tour guide certification and licensure programs** that exist in Hawai'i and explore industry best practices globally for possible implementation in Hawai'i. The study is expected to be completed by June 2022.
- Resumed its **Aloha 'Āina program** focused on the lasting value of stewardship by responsible community-based entities with an emphasis on 'āina-kanaka (land-human) relationships and knowledge for 2022 projects. The collective objective is to manage, conserve and revitalize



Hawai'i's natural resources and environment. The Hawai'i Community Foundation is administering this program on HTA's behalf.

- HTA continues to collaborate and partner with the State Department of Land and Natural Resources (DLNR) to enhance its efforts to protect Hawai'i's environment from mauka to makai (mountains to the sea).



- Enhanced efforts to protect Hawai'i's environment. In previous years, HTA has assisted DLNR to enhance the visitor experience at high-use areas, such as O'ahu's Mānoa Falls trail. HTA funded DLNR's **Universal Trail Assessment and Sign Initiative, and Trail Safety and Enhancement - Brushing/Maintenance/Rehabilitation project** to enhance the resident and visitor experience statewide.
- Continued discussions with DLNR, representatives of the Office of the Governor, the Senate and other parties to understand the opportunity to implement a statewide reservations system for park access. It was determined there is a desire to have other assets included in a system such as state trails and county parks. A reservation site may need to be built that focuses on the user experience and education that links to existing systems on the back end, much like a **channel manager**. HTA will continue to identify best practices and examples of systems that will reach the desired outcome.





Hawaiian Culture

Native Hawaiian culture is at the heart of our islands' uniqueness. The spirit and significance of the Native Hawaiian culture is

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

2021 Major Highlights

- Resumed the **Kūkulu Ola program**, founded on the value of ma ka hana ka 'ike (in working one learns). This program partners with community organizations that enhance, strengthen, and perpetuate the Hawaiian culture on HTA's behalf.
- Continued **integration of 'ōlelo Hawai'i (Hawaiian language) into daily business** to support its status as an official state language. HTA is currently in the process of translating its Destination Management Action Plans for the four counties after publishing the 2020-2025 HTA Strategic Plan. HTA also continues to post its monthly board meeting agendas in both official languages.
- Continued partnership with **Bishop Museum and Kamehameha Schools** on the **He Aupuni Palapala: Preserving and Digitizing the Hawaiian Language Newspapers project**. This project conserves, rescans and digitizes over 100 Hawaiian language newspapers that were published between 1834 and 1948. To date, 2,982 pages have been inventoried.



- Supported the **removal of bees from the 'Iolani Palace's walls and façade**, as well as the urgent repairs to the coronation stand. Work began in August 2020 and as of June 2021, all expected outcomes were successfully reached. The goals of the project were met resulting in a safer experience for visitors to the site and ensures the preservation of the structures for future generations.



- Continued support for the third season of the **Pop-Up Mākeke**, organized by the Council for Native Hawaiian Advancement. It was established to support Hawai'i's small business owners, particularly Native Hawaiian-owned businesses that depend heavily on community events, gatherings, craft fairs, and farmers markets. Since its first season, the mākeke brought in over \$2.4 million in sales and created a new income stream for Hawai'i small businesses, with over 40% of its customer base outside of Hawai'i.
- Financial support of **Hawaiian Airlines May Day 2021: Māka'ika'i**. This year's program featured performances of mele and hula, and interviews with kama'āina. It also promoted the kuleana with which kama'āina and malihini are charged when interacting within our home. A total of 1,208,319 viewed the program, of which 393,577 were in-state and 814,742 were out-of-state.



- Financial support for the **broadcast of Merrie Monarch Festival**. The event leveraged the high-profile participants and reach to impact



more viewers and prospective travelers with our host culture, traditions, and community. It attained over 3.37 million impressions for broadcast and a total of 13.08 million in impressions for social media. There was also over 400,000 unique visitors to its website. 100% of the participants were satisfied.

- Continued partnership with the **Native Hawaiian Hospitality Association (NaHHA)** to strengthen ties between the Hawaiian community and the tourism industry. Founded in 1997, NaHHA helps to inform and shape the future of Hawai'i tourism through Hawaiian cultural values as the foundation for business development and leadership.



NATIVE HAWAIIAN
HOSPITALITY ASSOCIATION

- Joint venture between NaHHA and **travel2change** to implement the **Kaiāulu Ho'okipa Impact Studio program** aimed at Hawai'i nonprofit organizations and community groups to build capacity to host experiences for kama'āina and visitors in a manner that advances the community's vision and aspirations. There are 29 participants in the first cohort which started in October.

- Hosted its annual **Ka Huina** conference with a series of four single-day virtual meetings that explored the nexus in Hawai'i of community, culture, tourism and sustainability. In total there were 628 live viewers and 507 Facebook viewers of the full series.
- Continued to provide **cultural training webinars** targeted at the visitor industry and businesses.



Training Curriculum	Attendees
Aloha, Ho'okipa, Kuleana	366
Intro to 'Ōlelo Hawai'i	166
Mālama	131
Wahi Pana	1,775

- Supported the Hawaiian language non-profit organization **Awaiaulu, Inc.'s Kīpapa**. This free online resource provides access to historic cultural and place-based Hawaiian language resources. Awaiaulu strives to build an informed community of kama'āina while providing an entry point for malihini to understand the complexities of Hawai'i's history. Curriculum to certain collections for grades K-12 will be added as Awaiaulu aims to continue to inspire educators to integrate resources into their teachings within and outside of the classroom by creating a model for them to follow.



Community

The Community area is comprised community enrichment, workforce development, sports, and safety and security. These

programs and activities support our communities to place their interests and benefits first. In addition, prevention programs are also provided to improve safety amongst residents and visitors and main Hawai'i's reputation that Hawai'i is a safe destination.

Community Enrichment

The Community Enrichment program promotes community-created projects, festivals and events provides authentic experiences that showcase Hawai'i's multi-cultures. Training workshops and resources are also offered to further develop skills and tourism products.

2021 Major Highlights

- Funded the expansion of the **Hawai'i FarmTrails app and website** to market and provide access to agritourism activities and events on a statewide level for residents and visitors alike.
- Partnered with **GoFarm Hawai'i, Hawai'i Agritourism Association, and O'ahu Resource & Conservation Development Council**, to conduct **educational agritourism tours** on the islands of Kaua'i, Maui, O'ahu, and Hawai'i. The target audience were farmers, agribusinesses, and the visitor industry with the purpose of showcasing best practices, encouraging networking, and building capacity. 40 participants took part in these tours in the month of May.



- Resumed the **Community Enrichment Program** which supports a diverse array of festivals, events, and year-round programs in support of culture, culinary, education, health and wellness, nature, agriculture, community sports, and voluntourism for 2022 projects. Partnering with the Hawai'i Visitors & Convention Bureau and its Island Chapters to administer this program for 2022.

Workforce Development

HTA continues to address the changing needs of today's tourism industry workforce by collaborating with educational institutions to make training available to residents working in travel and hospitality, while helping to enhance their quality-of-service skills. Sustaining tourism's success also depends on developing the next generation of Hawai'i's workforce, at all levels of employment, to carry the industry forward.

2021 Major Highlights

- Continued funding **ClimbHI's 9th annual LEI (Lead, Expose, Inspire) program** to inspire Hawai'i's youth to select careers in Hawai'i's visitor industry by providing them with the means to achieve success. More than 1,000 students from 33 high schools, middle schools, universities, and colleges in addition to 39 businesses/entities and 52 special guests participated in the virtual event on April 9. Post-event student reflections and a survey show a positive change to perceptions of the Hospitality Industry with 57% of respondents having a positive view on the industry before the event, and 93% of respondents having a positive view on the industry after the event.
- Supported the newly built portal, **ClimbHI Bridge**, to connect educators to visitor industry businesses for activities such as guest speaking site visits, judging and coaching, internships, and career fair participation.



- Continued working with the **Hawai'i State Department of Education (DOE)** to offer high school students the opportunity to obtain a **ClimbHI Service Excellence Certificate** exclusively designed for DOE's Career and Technical Education program. As of October 15, 2021, 561 certificates have been awarded.
- Continued partnership with **Ho'ōla Nā Pua** to conduct the **"Campaign for a Safe Community" Symposium series**. In collaboration with Homeland Security Investigations, Ho'ōla Nā Pua provided four 2-hour virtual training sessions on November 9 and 10 in continuation of the larger "Shine the Light and Turn the Tides Against Trafficking" campaign, which began in November 2019. In total there were 32 registrants representing a range of frontline professionals from hospitality, travel and tourism industries to real estate and government sectors.



Safety and Security

- HTA has been actively engaged in supporting our residents and visitors as part of the COVID-19 pandemic response. Last year, the HTA was involved in the VASH Flight Assistance Program, Airport Screening, Passenger Form Scanning, Call Center Operations, and Digital Data Collection. During 2021, we continued to support the following activities as part of our safety and security responsibilities:
 - VASH Flight Assistance Program
 - Visitor Assistance Programs
 - Daily Data Reporting
 - Weekly Senior-Leader Updates

2021 Major Highlights

- Continued financial support to **Visitor Aloha Society of Hawai'i (VASH)** to support the COVID-19 Flight Assistance Program. The program serves as a resource to law enforcement that may be faced with a need to return uncooperative travelers, subject to quarantine, back to their airport of origin. VASH

has assisted with airfare, hotel accommodations and taxi rides, when necessary. Since its inception, the program has supported the dismissal of

399

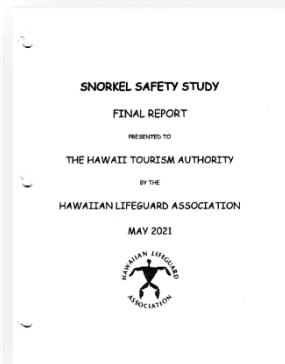
individuals



that did not want to comply with the State of Hawai'i's COVID-19 Pandemic Protocols. The average per person cost has been \$266.59 to run the program. If the program were not in place, it is estimated that the average per person cost to the State of Hawai'i would have been approximately \$7,370. This cost-saving program also prevented the potential spread of COVID-19 to communities by diverting non-compliant individuals before they leave the airport.

- Continued **Visitor Assistance Programs (VAP)** which contracts with organizations in all four counties to provide critical support to visitors in crisis. These programs are available to support visitors in crisis 24-hours a day, 365 days a year. In addition, local law enforcement and first responders are familiar with these programs and regularly connect our VAP partners with impacted visitors.
 - VASH (O'ahu) provided support to 1,108 visitors in crisis.
 - Visitor Aloha Society of Hawai'i Island aided 367 visitors.
 - Visitor Aloha Society of Kaua'i assisted 131 visitors.
 - Maui Visitor Assistance Program (County of Maui) provided services to 128 visitors and attended meetings at the EOC, Police Commission, Airport, VOAD and car rental committee meetings.
 - The industry assisted with \$4,400 of in-kind contributions.

- Completed the **snorkel safety study** with the **Hawaiian Lifeguard Association** in June 2021. The purpose of this two-year study was to assess the causes and risk factors in snorkel-related fatalities and near fatal drownings. The Snorkel Safety contract that was executed in 2019 for \$131,000. The study can be found on the HTA website.



the mayor of the respective island for their approvals. All event participants were covid tested and, of course, social distancing, masks and best hygiene practices were a common goal.

- Sentry Tournament of Champions at Kapalua generated \$501,000 for Maui charities, the highest in its more than 20-year history, despite challenges from COVID 19.



Sports

Sports is an important component of HTA's community and branding strategy. Sports events attract fans and foster the desire to visit Hawai'i through media exposure while giving residents opportunities to see world-class athletes compete in Hawai'i and support Hawai'i's youth. However, because of the COVID-19 pandemic, HTA sponsored only a handful of sporting events.

2021 Major Highlights

- Continued sponsorship of the **PGA Tour "Aloha Swing" (January 2021)**. The health and safety of all participants was the primary goal, and a comprehensive event plan was presented to both the Governor's office and to the office of
- Sony Open at Wai'alae generated over \$1.3 million in charitable grant distributions for Hawai'i's charities (distributed early April 2021), and remains the largest charity fund-raising golf tournament in Hawai'i.
- Mitsubishi Electric Championship at Hualālai is the official season opener for the PGA Tour.
- Collaborated with the **Polynesian Football Hall of Fame** to host a webinar scheduled for December 2021 to include interviews with NFL players to inspire Hawai'i athletes. Due to the COVID-19 pandemic, the 2021 Polynesian Bowl and the 2021 Polynesian Football Hall of Fame Enshrinement Ceremonies did not take place.



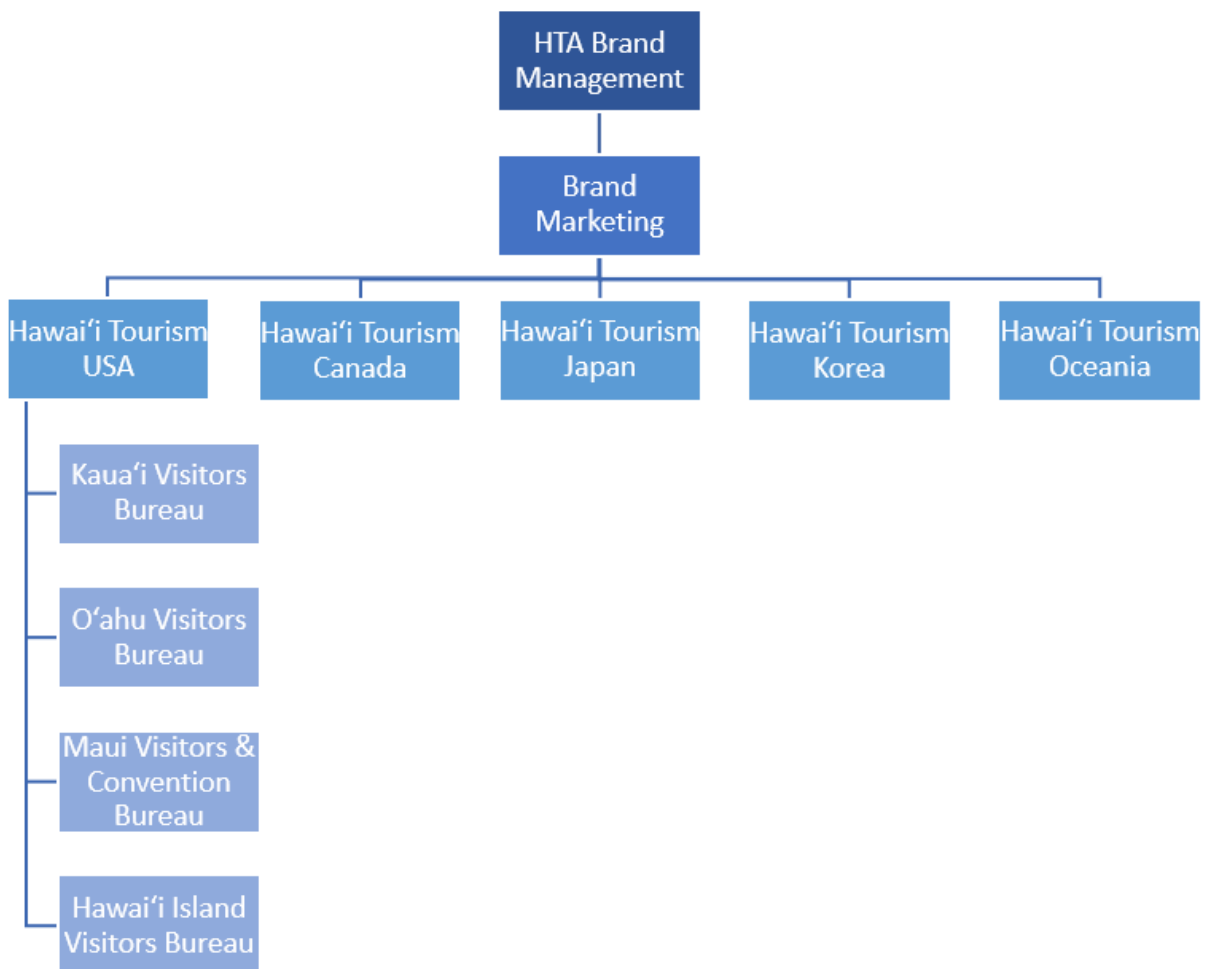
Brand Marketing

HTA contracts marketing organizations – collectively known as its Global Marketing Team (GMT) – to promote the Hawaiian

Islands worldwide. The GMTs' coverage in 2021 included the U.S., Canada, Japan, Oceania, and Korea. Due to the ongoing COVID-19 pandemic and boarder entry restrictions, all international GMTs were put on fixed costs for the first several months and maintained basic necessary presence in the market with activities centered on communications and market education.

Communication and education by the GMT's focused welcoming mindful travelers back with aloha. In September, the HTA board approved the revised brand management plans to utilize remaining contract balances to vamp up branding efforts in each market. These updated plans have a clear focus on visitor education, collaboration with industry partners, and aim to recover travel demand in a safe, sustainable, and regenerative manner.

Brand Marketing Structure



United States

The U.S. market led tourism's recovery at a time when international arrivals were mostly restricted. As a result, airlines redeployed larger aircraft with more capacity on their transpacific flights into the state. Hawai'i expects to see a forecasted 10,630,790 seats for year-end 2021 compared to 9,746,790 for year-end 2019. HTUSA's recovery strategy focused on welcoming back repeat visitors who know the islands and want to Mālama Hawai'i during their visit. Mālama Ku'u Home shares a destination vision of regenerative tourism that provides visitors with an enriching experience and sends them home knowing that when they travel mindfully and mālama the Hawaiian Islands and their communities, they are preserving, protecting and perpetuating Hawai'i for future generations of residents and visitors alike.

2021 Major Highlights

- Expanded the **Mālama Hawai'i** consumer campaign through an integrated marketing plan that included public relations, paid digital and social media that shared a series of new video content with four Hawai'i ambassadors invested in regenerative areas of aquaculture restoration, sustainable farming, reforestation and wildlife preservation. Proactive earned media efforts garnered high-profile media coverage in *Travel + Leisure*, *Good Morning America*, *Condé Nast Traveler*, *Thrillist*, *Forbes*, *NBC.com*, *SFGate.com* and more. The paid digital flights overdelivered by 5%, with over 46 million in delivered units. Lead generation ads drove an engagement rate 233% above the average for Mālama reopening video ads. These efforts were amplified by a cross-platform social media campaign that delivered a 34 million video views, 270,000 engagements and 56 million impressions.



- Coordinated the **Mālama Hawai'i Program**, a

statewide industry promotion that entices mindful travelers with a trip that gives back to Hawai'i. The call-to-action directs



consumers to gohawaii.com/malama that lists dozens of Hawai'i industry partners statewide who have collaborated with volunteer organizations to provide travelers with special offers if they participate in a voluntourism activity. Significantly, many hotel partners have provided a free night's stay or other exclusive offers to guests who voluntarily help to mālama Hawai'i. With more than 100 organizations participating, it is a true destination-wide effort and likely the largest public-private tourism marketing partnership in the state's history.

- Substantially **expanded efforts to train and educate travel advisors** via multiple trade channels (live, virtual and hybrid). From January to September 2021, more than 20,000 travel advisors across the country were briefed on destination travel protocols and educated about Mālama Hawai'i and the benefits to clients who experience a deeper connection with Hawai'i. This effort resulted in the Hawaiian Islands receiving three prestigious national industry awards: the American Society of Travel Advisors (ASTA) 2021 *North American Destination Partner of the Year*, as well as two awards from *TravelAge West*, including *U.S. Tourism Board Providing the Best Travel Advisor Support and Best Pandemic Community Response by a Tourism Board*, and an *Editor's Pick for Best Travel Advisor Engagement Program by a Tourism Board*.



- **Meetings, Conventions and Incentives (MCI).**

The pandemic continued to weigh heavily on the meetings business in general and on Hawai'i in particular due to quarantine and testing requirements and the extreme difficulty of getting international delegates into the state. This was compounded by county restrictions on meeting size implemented in response to the midyear surge in the Delta variant. As a result, the cancellations that began in 2020 continued in 2021 with the remaining offshore convention center bookings either moved to other destinations or in the process of rescheduling Hawai'i for a future year. However, these challenging times have fostered pent-up demand for meetings in Hawai'i and clients are anxious to book future years.

2021 Major Highlights:

- Deployed by year end, a full *Meet Hawai'i* sales force working on converting demand into actual bookings.
- Collaborated with Hawai'i MCI partners to develop *COVID-19 Guidelines for the MCI Industry* that prioritized the health and safety of residents and meeting attendees.
- Held two *I MUA HAWAII* virtual trade shows in April and June to generate future single-property and citywide business.
- Put in place a full, dedicated and seasoned citywide sales team to complement the single-property sales team.



Canada

Canada is the second largest international market and fourth largest source market overall for visitors to Hawai'i. Canada's economy has had a steady recovery from the COVID-19 pandemic. Labor markets have been slowly coming back to pre-pandemic strength. Output growth is forecast at 5.1% for 2021 and 4.4% for 2022. The vaccine rollout in Canada has had positive traction getting the market prepared for travel with 74.7% of the population fully vaccinated at the beginning of November. Hawai'i Tourism Canada (HTCAN) has been constantly in contact with the market and key partners to stimulate demand and retain market share while targeting the mindful traveler. This has been accomplished through the promotion of the Hawai'i Destination Specialist Program, continued public relations outreach gaining over 117 million impressions, and sharing respectful and inspirational social media messaging. Assuring trade partners had updated information on the re-opening protocols for Hawai'i was a key ongoing communication strategy. Canadian airlines have serviced Hawai'i through 2021 with brief interruptions due to travel restrictions and demand.

2021 Major Highlights

- Kept Hawai'i top-of-mind by consistently posting on HTCAN's Canadian-dedicated social networks with **Mālama Hawai'i, regenerative and responsible travel messages**. Digital and social programming ran in the fall months showing the Mālama videos with over 23 million impressions. They were also shared with key partners including airlines, retail agents and

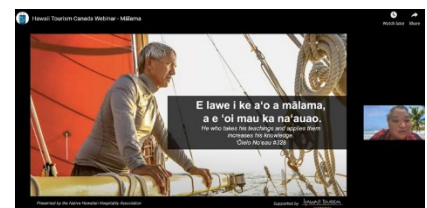


tour operators. In the late summer and early autumn, the Mālama videos were shown in the inflight entertainment system of the WestJet flights bound to Hawai'i.

- Executed the 2nd virtual **2021 Aloha Canada trade mission** on October 28. The marquee travel trade and PR event had a Hawaiian cultural focus with NaHHA as one of the key partners participating in the trade show. Meeting planners and travel trade media from across Canada met with the Island Chapters, resulting in immediate coverage by four key travel trade media in the country in both French and English. The event highlighted 19 Hawai'i industry partners who had the opportunity to interact in real time with approximately 450 travel agents.

- Launched an **educational campaign for travel agents on the Spoiled Agent platform** including Facebook Live. The campaign was focused on the Hawaiian culture and consisted of six webinars.

The first training webinar was presented



by NaHHA sharing the meaning of mālama and the second was presented by HTCAN as an overview of the state and clarifying the travel restrictions at the time. The rest of the series was presented by the Island Chapters, highlighting the cultural aspects of the Hawaiian Islands, and providing updates. The first two Fall webinars trained more than 150 agents, and promoted the Hawai'i Destination Specialist Program, encouraging agents to enroll in the educational training. The webinars are available on the Spoiled Agent website through 2021.

Japan

COVID-19 continued to disrupt international travel while negatively impacting Japan's economy. Limited airlift to Hawai'i and travel restrictions imposed by the Japanese government (14-day quarantine for returning travelers that was subsequently reduced to 10 days effective October 1, 2021) resulted in Japanese visitor arrivals at 98.7% below 2019 levels. To maintain a strong presence in the Japan market and prepare for the reopening of our Japanese outbound market, Hawai'i Tourism Japan (HTJ) reinforced its relationships with key industry stakeholders and amplified its public relations efforts. HTJ also maximized digital promotional opportunities by delivering video messages and conducting online educational sessions, in collaboration with industry partners and the local resident community. In 2021, HTJ continued to position Hawai'i as a safe destination and shared the "Mālama Hawai'i" messaging throughout the Japan market leveraging owned digital and social channels, earned media and travel trade partners' platforms.

2021 Major Highlights

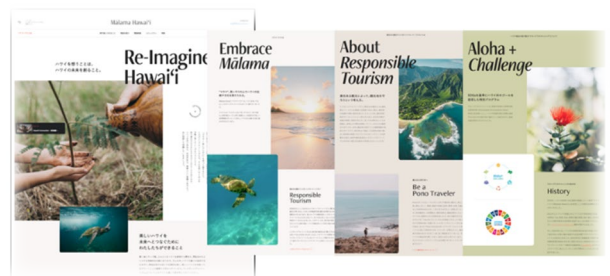
- Focused and aligned **PR outreach efforts by pitching Mālama Hawai'i, regenerative tourism, mindful travelers (pono travelers), and Aloha+ Challenge initiatives** to Japanese



media. In total, HTJ produced 137 media coverages with 12,114,932 in AVE and 16,091,972,696 impressions (as of November 3). In addition, HTJ issued 15 press releases centered on sharing Hawai'i's current state of

affairs and newsworthy updates to garner coverage for Hawai'i, resulting in 488 media exposures.

- Developed **three key microsites** under Allhawaii.jp: Mālama Hawai'i (<https://www.allhawaii.jp/malamahawaii>) and Surfing (<https://www.allhawaii.jp/surfing>) - both launched on Earth Day, April 22, and Hōkūle'a (<https://www.allhawaii.jp/hokulea>) - launched on July 21 to commemorate Japan's Ocean Day.
- Collaborated with **industry stakeholders and the local community to incorporate their regenerative tourism efforts into the microsites**. These Microsites reached 251,658 PV and 102,918 UU as of November 3.



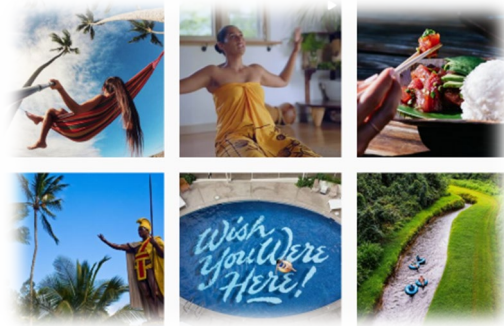
- Created the **"Support Hawai'i" program** that showcased Hawai'i's historical treasures including Bishop Museum and Polynesian Voyaging Society "Hōkūle'a". Virtual online tours were featured resulting in 400 individuals donating funds nearly topping \$7,100.
- Conducted travel trade online educational events including **Hawai'i Tourism Forum (HTF) and Hawai'i Tsushin Zemi**. 2,500 livestream attendees participated in three HTF events and Hawaii Tsushin Zemi archive video received nearly 7,500 views. Furthermore, HTJ conducted 26 webinars to educate approximately 3,000 Aloha Program members on authentic Hawaiian culture, Hawai'i's rich history and more.

Oceania

Australian and New Zealand governments adopted the COVID-19 elimination approach at the beginning 2021. This provided greater internal freedoms due to the lack of COVID-19 in the community (with occasional regional lockdown exceptions) and enabled the economy to operate at greater levels than what was seen in most other countries around the globe. The industry most detrimentally affected by this approach was tourism due to the ringfencing of the area via border restrictions. Following the arrival of the Delta variant in the second half of the year, the governments were forced to change from the elimination approach. Based on high vaccination rates, Australia was particularly progressive at starting to reopen international travel resulting in the recommencement of Sydney to Honolulu flights by both Hawaiian Airlines and Qantas in December. Hawai'i Tourism Oceania (HTO) began rebuilding the team in Q4, in line with increasing marketing activity around trade education, consumer branding and the introduction of Mālama Hawai'i messaging. With a strong economy and high pent-up demand, the region is in an advantageous position for recovery and the return of high value visitors.

2021 Major Highlights

- Continued social media activity that projected the right themes and tone.
- Mālama Hawai'i was introduced into the market.
- Trade connections and education were maintained.



Korea

Korea's economy has grown steadily through robust exports, despite the ongoing pandemic. The vaccination completion rate, which stayed at 4.2% until May, rose rapidly to 75% by October. Korea began its 'With COVID-19' scheme from November to gradually lift restrictions. Korea's consumer sentiment rose to the highest level in four months in October. For the first three quarters of 2021, Hawai'i Tourism Korea (HTK) focused its efforts on disseminating Mālama Hawai'i's message and educating the travel trade and visitors on responsible travel and Hawai'i's regenerative tourism model. In the fourth quarter, to align with airlines' resumption of direct flights to Hawai'i, HTK was in close communication and collaboration with the airlines and major travel trade partners to plan and develop Mālama Hawai'i-themed products and trade FAM tour. HTK also actively collaborated with the Island Chapters to keep Hawai'i a top-of-mind destination

2021 Major Highlights

- Executed an **online Mālama Hawai'i consumer campaign with Korean Air** in September ahead of its resumption of Incheon to Honolulu service in November. A dedicated consumer event page was created and incorporated on the airlines' official website, which included Mālama Hawai'i videos and other educational materials to convey the Mālama Hawai'i message. Additionally, HTK and Korean Air's social media channels amplified the campaign message. The campaign generated 914,243 in total reach on via Instagram, Facebook, and Twitter; 260,000 e-Newsletter recipients; 12,061 event page clicks with 2,251 comments.



- Positioned Hawai'i as a safe destination.** Worked closely with HTA, Department of Health, and Attorney General's Office to establish Trusted Testing and Travel Partners (TTP) program in Korea. To date, seven Korean hospitals/test centers have been accepted into the program. HTK shared the TTP program and positioned Hawai'i as a safe and responsible destination through various channels including GoHawai'i Korean website, Instagram, and B2C and B2B newsletters. Media coverage in leading trade publications and online media generated 1,085,185 views and \$112,700 PR Value. In addition, Korean travel trade webinars were conducted to provide up-to-date information on Hawai'i's safety protocols and detailed guidelines for travel agencies to handle consumer inquiries.

- Joint Consumer Promotion with Yongin-based indoor-outdoor water park Everland Resort Caribbean Bay during the summer.** The

integrated consumer campaign was designed to inspire Korean travelers to keep

Hawai'i top of mind. It consisted of three offline and online consumer events and highlighted responsible travel via Mālama Hawai'i videos and localized educational messages. The online event drew more than 2,000 participants (generating 880,000 impressions and including a mobile app push to 940,000 users). The Aloha Photoshoot event attracted participation from over 200 water park guests, while its Instagram Sweepstakes generated more than 10,500 likes and 100,000 impressions.



Hawai'i Convention Center

The Hawai'i Convention Center (HCC) continued to follow State of Hawai'i restrictions on gathering limits and measures to prevent the spread of COVID-19. For much of FY21, the Center remained closed to public events allowing only limited events that were approved through the City and County of Honolulu's structured event approval process. In addition to these limited number of events, the Center has continued to serve our communities. During FY21, numerous other maintenance projects were completed throughout the building, including tile replacement, water feature improvements, roof repairs, roof overflow drains, and chiller repairs.

2021 Major Highlights

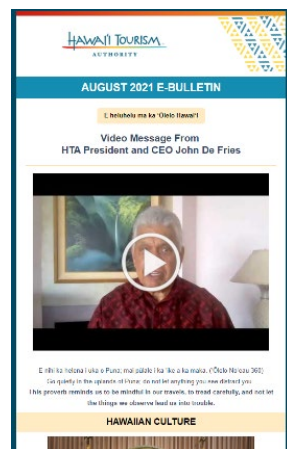
- Served as a temporary satellite location for the Hawai'i Department of Labor and Industrial Relations to process unemployment insurance claims. While this area within the facility was not open to the public, volunteer personnel and staff used socially distanced workstations to process unemployment claims.
 - Utilized a portion of the Center for contact tracing.
 - Continued to follow a comprehensive [health and safety program](#) developed by leading venue and event management company ASM Global to ensure the highest levels of health and safety for staff, guests and communities and complied with guidelines established by the Centers for Disease Control (CDC) and the State of Hawai'i Department of Health.
- HCC also **completed several major capital improvement and maintenance projects** to enhance the overall operations of the building and prepare for reopening. Projects include:
 - **Cooling Tower Replacement:** Cooling tower replacement completed in late 2020. Replacement of four towers to ensure the facility's air conditioning system operates efficiently and reliably to support activity within the Center.
 - **Facility Equipment:** The Center has completed the purchase and received delivery of new banquet chairs and décor items. These replace the 20-year-old chairs and items and will allow the Center to better service events.
 - **Energy-Efficient Lighting:** As part of its commitment to environmental sustainability and its recent Leadership in Energy and Environmental Design (LEED) Certification, the Center completed upgrades to the lighting, specifically to LED bulbs in select locations, which will save on energy consumption.
 - **Trellis Replacement:** The Center's damaged wooden trellises were removed and are being replaced with a shading system that is expected to be completed in FY22. These new shading systems will allow better usage of outdoor space and provide protection from weather. We anticipate this enhancement will increase bookings of our outdoor spaces.

Communications & Public Affairs

During much of 2021, HTA's communications efforts were focused on crisis communications because of the COVID-19 pandemic and phased reopening of Hawai'i's visitor industry. HTA's communications team prioritized the timely delivery of newsworthy updates to its staff, board members, the HTA global marketing team, county officials, state lawmakers, industry partners and others.

Internal and industry communications

- Relunched the monthly HTA e-bulletin in June with a new format including a video message from the President & CEO, and updates from each of HTA's four strategic pillars. The entire newsletter is available in both 'Ōlelo Hawai'i and English.
- Continued to transmit news releases and other timely updates to HTA's 20,000+ e-mail subscribers that represent industry stakeholders, elected leaders, agency officials, and members of the community.



Media relations

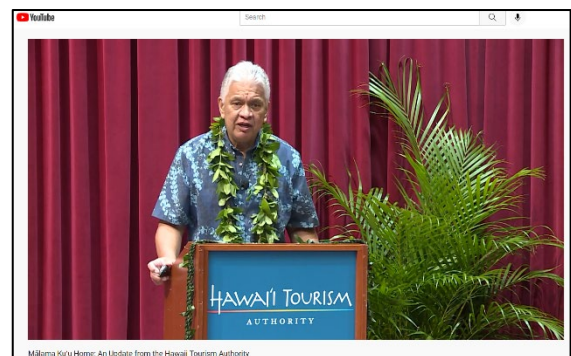
- Responded to hundreds of inquiries and facilitated interview requests from reporters and members of the media in Hawai'i, on the Continental U.S. and around the world
- Sent 50 press releases as of November 2021 to HTA's distribution list
- Assisted HTA's President and CEO with press conferences

Crisis response

- Responded to thousands of emails, phone calls and social media messages from travelers and future travelers mainly regarding the quarantine protocols and pre-travel testing program
- Responded to inquiries from visitor industry partners
- Participated in the state's Joint Information Center and worked closely with public information officers in other state and county agencies
- Continued to maintain a one-stop COVID-19 page on HTA's website: www.hawaiiourismauthority.org/covid-19-updates/

Other

- Moved HTA's communications responsibilities into a newly created position in the Papahāna Ho'okele Huliau Change Management Plan. The Public Affairs Officer position was filled in November.
- Presented "Mālama Ku'u Home: An Update from the Hawai'i Tourism Authority" which was streamed via Zoom Webinar and Facebook Live on October 1; over 1,600 people participated in the update via Zoom, and viewed it on Facebook and YouTube to date
- Assisted with edits for research reports, DMAP materials and web copy.



Tourism Research

Pursuant to Act 88, the Tourism Research Division (TRD) was transferred to DBEDT's Research & Economic Analysis Division (READ) effective July 1, 2021, and was renamed the Tourism Research Branch (TRB).

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 balancing the needs of Hawai'i's residents and communities. TRB ensures quality marketing research is available to educate tourism stakeholders and help empower them in making intelligent, data-driven decisions.

Ongoing programs include:

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

2021 Major Highlights

- TRB continued to provide support Office of Enterprise Technology Services (ETS) and others during the COVID-19 pandemic.
- TRB developed special publications related to the pandemic to provide additional insights for stakeholders' recovery planning.
 - Daily Transpacific passenger arrival numbers, as requested by ETS.
 - Weekly Hawai'i YouGov Destination Brand Index Trends for the U.S., Japan, and Canada

Market

- Weekly Hawai'i YouGov Destination Brand Index Trends for U.S. Responsible Travelers
- Weekly HTA Travel Agency Bookings Report
- Weekly Travel Agency Booking Reports to Hawai'i for Future Arrivals
- Weekly Travel Agency Bookings for Future Travel to Hawai'i
- Monthly YouGov Coronavirus Travel Sentiment Tracker for the U.S Market
- TRB increased the frequency of updates to Scheduled Air Seat Outlook for the pandemic and added flight information.

HTA Research Publications

Ongoing Publication	Frequency
Monthly Visitor Statistics and News Release	Monthly
Major Market Area Highlights & Fact Sheets	Monthly
Summary Dashboards – State & Island	Monthly
Visitation Insight Dashboards – Visitors and Residents	Monthly
Air Seat Outlook (3 months)	Monthly
Hawai'i Hotel Performance Report	Monthly
Hawai'i Timeshare Quarterly Report	Quarterly
Hawai'i Vacation Rental Performance Report	Monthly
Annual Visitor Research Report	Annually
Visitor Plant Inventory	Annually
Quarterly Visitor Satisfaction Monitoring Report	Quarterly
Annual Visitor Satisfaction & Activities Report	Annually
Marketing Effectiveness Study	Annually
Resident Sentiment Survey	Bi-Annually
Daily Air Passenger Counts	Daily
Tourism Forecast	Quarterly
Tourism Dashboard	Monthly
Tourism Data Warehouse	Monthly

Statewide and Island Visitor Statistics¹

Table 1: Statewide Visitor Statistics

Statewide	2020	2021 Forecast	% Change	2020 YTD (OCT)	2021P YTD (OCT)	% Change
Visitor Expenditures (\$mil.)	NA	12,686	NA	NA	10,155.9	NA
Visitor Arrivals (Air and Cruise)	2,708,258	6,840,000	152.6%	2,287,904	5,410,436	119.8%
Per-Person Per-Day Spending	NA	195.1	NA	NA	195.5	NA
Total Air Seats	5,318,667	11,021,477	107.2%	4,278,381	8,643,499	102.0%

Table 2: O'ahu Visitor Statistics

O'ahu	2020	2020 YTD (OCT)	2021P YTD (OCT)	% Change
Visitor Expenditures (\$mil.)	NA	NA	4,415.7	NA
Visitor Arrivals	1,506,316	1,316,563	2,646,851	86.6%
Per-Person Per-Day Spending	NA	NA	204.9	NA
Total Air Seats	3,370,122	2,803,908	4,414,093	57.4%

Table 3: Kaua'i Visitor Statistics

Kaua'i	2020	2020 YTD (OCT)	2021P YTD (OCT)	% Change
Visitor Expenditures (\$mil.)	NA	NA	1091.0	NA
Visitor Arrivals	330,263	298,013	622,184	87.5%
Per-Person Per-Day Spending	NA	NA	202.7	NA
Total Air Seats	322,993	258,853	608,344	135.0%

Table 4: Island of Hawai'i Visitor Statistics

Island Of Hawai'i	2020	2020 YTD (OCT)	2021P YTD (OCT)	% Change
Visitor Expenditures (\$mil.)	NA	NA	1,403.7	NA
Visitor Arrivals	493,817	417,614	929,657	105.3%
Per-Person Per-Day Spending	NA	NA	162.9	NA
Total Air Seats	523,386	399,537	1,123,997	181.3%

Table 5: Maui Visitor Statistics

Maui	2020	2020 YTD (OCT)	2021P YTD (OCT)	% Change
Visitor Expenditures (\$mil.)	NA	NA	3,143.5	NA
Visitor Arrivals	792,602	637,683	1,861,798	172.1%
Per-Person Per-Day Spending	NA	NA	195.6	NA
Total Air Seats	1,102,166	816,083	2,497,065	206.0%

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

2021 Statewide Forecast: DBEDT 4th Quarter 2021 forecast dated November 30, 2021.

2021 Global Source Markets Forecast: DBEDT 3rd Quarter 2021 forecast dated October 22, 2021

2021 Air Seat Forecast: HTA/DBEDT READ analysis based on scheduled seats from Diio Mi flight schedules as of October 20, 2021, subject to change

Table 6: Moloka'i Visitor Statistics

Moloka'i	2020	2020 YTD (OCT)	2021P YTD (OCT)	% Change
Visitor Expenditures (\$mil.)	NA	NA	18.5	NA
Visitor Arrivals	17,025	15,335	19,806	18.9%
Per-Person Per-Day Spending	NA	NA	136.8	NA
Total Air Seats	0	0	0	NA

Table 7: Lāna'i Visitor Statistics

Lāna'i	2020	2020 YTD (OCT)	2021P YTD (OCT)	% Change
Visitor Expenditures (\$mil.)	NA	NA	83.5	NA
Visitor Arrivals	17,924	15,763	37,840	120.4%
Per-Person Per-Day Spending	NA	NA	450.8	NA
Total Air Seats	0	0	0	NA

Global Source Markets

Table 8: U.S. West Market Visitor Statistics

U.S West	2020	2021 Forecast	% Change	2021 YTD (OCT)	% Change
Visitor Expenditures (\$mil.)	NA	7,520.55	NA	6,302.3	NA
Visitor Arrivals	1,311,176	4,530,046	245.5%	3,617,074	254.1%
Per-Person Per-Day Spending	NA	184.7	NA	190.2	NA
Total Air Seats	3,772,048	9,197,051	143.8%	7,303,745	152.9%

Table 9: U.S. East Market Visitor Statistics

U.S East	2020	2021 Forecast	% Change	2021 YTD (OCT)	% Change
Visitor Expenditures (\$mil.)	NA	4,094.37	NA	3,374.3	NA
Visitor Arrivals	676,150	2,027,168	199.8%	1,606,495	184.7%
Per-Person Per-Day Spending	NA	202.4	NA	202.4	NA
Total Air Seats	487,874	1,274,089	161.2%	1,023,133	161.0%

Table 10: Japan Market Visitor Statistics

Japan	2020	2021 Forecast	% Change	2021 YTD (OCT)	% Change
Visitor Expenditures (\$mil.)	NA	74.16	NA	61.4	NA
Visitor Arrivals	289,137	20,633	-92.9%	17,195	-94.0%
Per-Person Per-Day Spending	NA	217.4	NA	217.7	NA
Total Air Seats	483,574	170,032	-64.8%	99,284	-78.8%

Table 11: Canada Market Visitor Statistics

Canada	2020	2021 Forecast	% Change	2021 YTD (OCT)	% Change
Visitor Expenditures (\$mil.)	NA	68.09	NA	87.4	NA
Visitor Arrivals	164,393	21,126	-87.1%	27,570	-82.7%
Per-Person Per-Day Spending	NA	178.4	NA	182.1	NA
Total Air Seats	177,913	154,855	-13.0%	37,389	-77.3%

Table 12: Oceania Market Visitor Statistics

Oceania	2020	2021 Forecast	% Change	2021 YTD (OCT)	% Change
Visitor Expenditures (\$mil.)	NA	9.68	NA	7.8	NA
Visitor Arrivals	50,710	2,685	-94.7%	2,188	-95.7%
Per-Person Per-Day Spending	NA	242.1	NA	239.1	NA
Total Air Seats	95,737	10,141	-89.4%	0	NA

Table 13: Korea Market Visitor Statistics

Korea	2020	2021 Forecast	% Change	2021 YTD (OCT)	% Change
Visitor Expenditures (\$mil.)	NA	34.90	NA	30.2	NA
Visitor Arrivals	46,884	7,146	-84.8%	6,685	-85.7%
Per-Person Per-Day Spending	NA	246.0	NA	243.19	NA
Total Air Seats	72,287	54,644	-24.4%	24,464	-65.6%

Statement of Revenue, Appropriations and Expenditures

HTA was funded through money collected from the Transient Accommodations Tax (TAT) through June 20, 2021, a 10.25% tax that people pay when they stay in legal accommodations in Hawai'i. Expenditures represent encumbrances made with fiscal year 2021 funds. Due to the timing of receiving TAT allocations in fiscal year 2021, we also encumbered contracts for many of HTA's fiscal year 2022 programs, which are included in the below financial information. The table below does not include anticipated revenue for fiscal year 2022.

Hawai'i Tourism Authority

Fiscal Year 2021 Actuals

(\$000)

REVENUES	
TAT Deposits - Tourism Special Fund	\$21,505
Investment Income / Miscellaneous Receipts	\$1,714
Allocations of Federal Funds	\$34
TOTAL REVENUES	\$23,253
APPROPRIATIONS	
FY 2021	\$87,675
TOTAL APPROPRIATIONS	\$87,675
HTA EXPENDITURES*	
Perpetuating Hawaiian Culture	\$11,234
Natural Resources	\$3,491
Community	\$8,049
Branding	\$44,544
Sports	\$2,508
Safety and Security	\$1,486
Tourism Research	\$2,418
Administrative	\$1,903
Governance and Organization-Wide	\$1,385
TOTAL HTA EXPENDITURES	\$77,018
<i>* Hawaiian culture is intertwined throughout all areas of HTA activity.</i>	

Hawai'i Convention Center

Fiscal Year 2021 Actuals

(\$000)

REVENUES	
TAT Deposits - Convention Center Enterprise Special Fund	\$16,500
Convention Center Operations	\$5,931
Investment Income / Miscellaneous Receipts	\$316
TOTAL REVENUES	\$22,747
APPROPRIATIONS	
FY 2021	\$54,070
TOTAL APPROPRIATIONS	\$54,070
EXPENDITURES	
Convention Center Facility Operations:	
Operator Costs	\$20,820
HTA Administration	\$257
Governance & Org-Wide Costs	\$855
<i>(Incl. Convention Center Insurance)</i>	
Convention Center Sales and Marketing	\$1,966
Convention Center Repair and Maintenance	\$22,960
TOTAL EXPENDITURES	\$46,858

Hawai'i Tourism Authority

Hawai'i Convention Center

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