

HAWAII TOURISM

AUTHORITY

2015 Annual Report
to the Hawai'i State Legislature



[§5-7.5] “Aloha Spirit”

(a) “Aloha Spirit” is the coordination of mind and heart within each person. It brings each person to the self. Each person must think and emote good feelings to others. In the contemplation and presence of the life force, “Aloha”, the following unuhi laula loa may be used:

“Akahai”, meaning kindness to be expressed with tenderness;

“Lōkahi”, meaning unity, to be expressed with harmony;

“‘Olu‘olu”, meaning agreeable, to be expressed with pleasantness;

“Ha‘aha‘a”, meaning humility, to be expressed with modesty;

“Ahonui”, meaning patience, to be expressed with perseverance.

These are traits of character that express the charm, warmth and sincerity of Hawai‘i’s people. It was the working philosophy of native Hawaiians and was presented as a gift to the people of Hawai‘i. “Aloha” is more than a word of greeting of farewell or a salutation. “Aloha” means mutual regard and affection and extends warmth in caring with no obligation in return. “Aloha” is the essence of relationships in which each person is important to every other person for collective existence. “Aloha” means to hear what is not said, to see what cannot be seen and to know the unknowable.

(b) In exercising their power on behalf of the people and in fulfillment of their responsibilities, obligations and service to the people, the legislature, governor, lieutenant governor, executive officers of each department, the chief justice, associate justices, and judges of the appellate, circuit, and district courts may contemplate and reside with the life force and give consideration of the “Aloha Spirit”. [L 1986, c 202, §1]



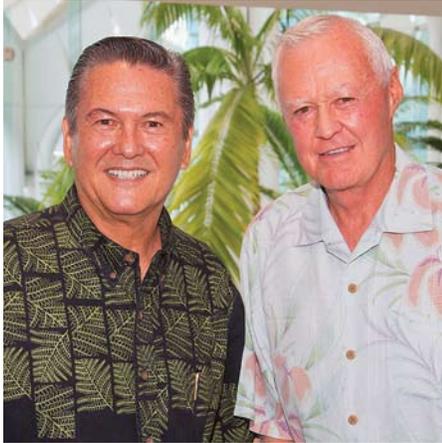
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Aloha,

On behalf of the Hawaii Tourism Authority (HTA), the state of Hawaii's tourism agency, we are pleased to present the HTA's Annual Report that covers what we have accomplished, as well as the challenges we have faced from January through October of this year.



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

This has been a year of change for the HTA. Both of us began our new roles as president and CEO and board chair mid-year. As we took on our new positions, we have been working with the HTA board of directors and staff to transition into this new chapter here at the HTA.

We have had three, going on four, record-breaking years of growth for Hawaii's visitor industry, and that is something we are working hard to maintain. The state is also projected to reach a record number of air seats servicing the Hawaiian Islands in 2015. And while this is a good indication as we look ahead, we must work hard with all of our partners in the visitor industry to maintain this growth for the long-term sustainability of our visitor industry.

Collaboration with our stakeholders and the community will also be key for us to ensure that we continue to enhance our infrastructure and product for both our visitors and residents.

With unemployment at all-time lows, our industry is supporting more than 175,000 jobs this year for our residents. Our collective efforts are so important for the continued success of our tourism economy.

The partnerships with our government leaders, marketing partners, industry stakeholders and the community have been key to the success of tourism. Mahalo for all of your support and we look forward to continuing to work together.

Ma ka 'ao'ao o ka Hawaii Tourism Authority (HTA), ke ke'ena pai ho'omāka'ika'i o ka moku'āina o Hawaii, ke pane'e aku nei māua i ka Palapala Hō'ike Kūmakahiki o ka HTA, nona ho'i nā lanakila, pēlā pū me nā ālaina i 'ike 'ia mai Ianuali a i 'Okakopa o kēia makahiki.

He makahiki piha loli kēia no ka HTA. Ua ho'omaka māua 'elua ma ko māua mau kūlana pelekikena a lunaho'okele a me ka lunaho'omalua papa alaka'i ma waena makahiki. Ma ia mau kūlana hou iho nei, ua noke i ka hana ana me ka papa alaka'i HTA a me nā limahana ma ka ho'one'e 'ana aku i loko o kēia wā hou o ka HTA.

He 'ekolu a kokoke e piha 'ehā makahiki kūho'e o ka ulu 'oihana ho'omāka'ika'i o Hawaii nei, he mea ho'i a māua e 'imi nui nei e ho'omau. Ke wānana pū 'ia nei e kūho'e mai i ka MH 2015 ka heluna noho o luna o nā mokulele o ko kākou pae'āina. 'Oiai ho'i he ho'olana mana'o kēia nūhou no kēia mua aku, aia i ka ho'oikaika nui 'ana o kākou, nā pakanā o loko o ka 'oihana ho'omāka'ika'i, ka mau o kēia ulu a lana pono kā kākou 'oihana a mau pono aku nō.

Na ka 'enehana e ho'ololi nei i nā hi'ohi'ona o ka 'oihana ho'omāka'ika'i, a 'o ia mea kekahi e kālele 'ia ma kēia ne'e 'ana i mua. Ke maka'ala mau nei me ka makahi'o i nā ala e hokona ai iā Hawaii nei i mua o ka maka o nā hanauna hou e puni 'ike 'āina hou ana.

Ua 'ike nō māua he mau ālaina ana ko mua. Ma ka hana like 'ana na'e ke kī'ina e ho'oulu ai i ka 'oihana me ke akamai, me ka mālama mau ma ke 'ano e pono like ai ke kaiāulu ākea a me ka 'oihana. Ke ho'olauka'i me ka po'e pili 'oihana a me ko ke kaiāulu, pēlā e mālama ai i ka u'i o Hawaii a me ka ma'ema'e o ka pili like 'ana me ia u'i no ke kama'āina a me ka malihini.

He wā kēia i emi loa ai ka heluna po'e pa'a hana 'ole a he 175,000 nō ho'i a 'oi o ka 'āina e hana nei i loko o ka 'oihana ho'omāka'ika'i. No laila, he mea ko'iko'i nō ho'i kā kākou mau hana no ka holomua o ka 'ēkonomia o Hawaii nei, 'oiai 'o ka ho'omāka'ika'i kona kahua nui.

'O ka lanakila o ka 'oihana ho'omāka'ika'i, he lanakila nō ia no loko o nā pilina ma waena o nā alaka'i aupuni, pakanā hokona, hoa pili 'oihana, a me ke kaiāulu. Ke mahalo aku nei māua no ke kākō'o nui a me ke kākō'o iki a ke kau nui pū aku nei ka mana'o no ka ho'omau i nā hana like.

Me ka mahalo,

George D. Szigeti
HTA President & CEO

L. Richard Fried
HTA Board Chair

Members

- L. Richard Fried, Jr., Chair**
Partner
Cronin, Fried, Sekiya, Kekina & Fairbanks, Attorneys At Law
- Craig G. Nakamura, Vice Chair**
Partner
Carlsmith Ball LLP
- Lorrie Stone, Vice Chair**
Attorney At Law
Lorrie Lee Stone, Attorney At Law, LLLC
- Fred Atkins**
Managing Partner
Kaua'i Kilohana Partners
- Jack Corteway**
(Retired)
- Sean R. Dee**
EVP, Chief Marketing Officer
Outrigger Enterprises Group
- Gerald De Mello**
Emeritus Professor
Hawai'i Community College
- Donna Domingo**
President
ILWU Local 142
- George Kam**
Ambassador of Aloha
Quicksilver, Inc.
- David Rae**
(Retired)
- Denise Hayashi Yamaguchi**
President & CEO
Denise Hayashi Consulting, LLC

Representation

- City & County of Honolulu
- Maui County
- At-large
- Kaua'i County
- At-large
- At-large
- Hawai'i County
- At-large
- At-large
- At-large
- At-large
- At-large

HTA Investigative Committee Membership

(As of Sept. 24, 2015)

Tourism Strategic Plan Investigative Committee

- David Rae, *Chair*
- Sean Dee
- Patty Ewing, *Community representative*
- Kyoko Kimura, *Community representative*
- L. Richard Fried, **Board chair; ex-officio member*
- Donna Domingo
- Denise Yamaguchi

Convention Center Planning Investigative Committee

- Lorrie Stone, *Chair*
- Jack Corteway
- L. Richard Fried, **Board chair; ex-officio member*
- Sean Dee
- Craig Nakamura

Legislative and Governmental Affairs Investigative Committee

- George Kam, *Chair*
- Fred Atkins
- Sean Dee
- Gerald De Mello
- David Rae
- Lorrie Stone

Visitor Related Infrastructure Investigative Committee

- David Rae, *Chair*
- Sean Dee
- Donna Domingo
- Lorrie Stone
- Denise Yamaguchi

Standing Committee Membership

(As of Sept. 24, 2015)

Administrative Standing Committee

(Quorum: 2 members)

- L. Richard Fried, *Chair*
- Craig Nakamura
- Lorrie Stone

Audit Standing Committee (Quorum: 2 members)

- Craig Nakamura, *Chair*
- Fred Atkins
- Jack Corteway

*All committees are supported by the HTA staff

The HTA held its meetings once a month in 2015 and is scheduled to hold monthly meetings in 2016.

From left: Gerald De Mello, David Rae, Denise Hayashi Yamaguchi, Lorrie Stone, Craig Nakamura, L. Richard Fried, Fred Atkins, Donna Domingo, George Kam and Sean Dee. Not pictured: Jack Corteway



Staff

George D. Szigeti

Title

*President and
Chief Executive Officer
(Effective 05/28/2015)*

Randy Baldemor

Chief Operating Officer

Marc Togashi

Vice President Finance

Caroline Anderson

Tourism Brand Manager

Maile Carvalho

Accounting Assistant

Jennifer Chun

Tourism Research Manager

Minh-Chau Chun

Tourism Research Manager

Jadie Goo

Tourism Brand Manager

Laci Goshi

Tourism Brand Manager

Denise Kahalekulu

Administrative Assistant

Lawrence Liu

Tourism Research Statistician

Chika Miyauchi

Administrative Assistant

Daniel Nāho'opi'i

Director of Tourism Research

Roann Rakta

Executive Assistant

Ronald Rodriguez

Contract Specialist

Michele Shiwaki

Administrative Assistant

Iris Takamoto

Budget & Fiscal Officer

Vengie Talaro

Administrative Assistant

Miki Wakai

Tourism Brand Manager

Keli'ihoalani Wilson

Director of Hawaiian Cultural Affairs

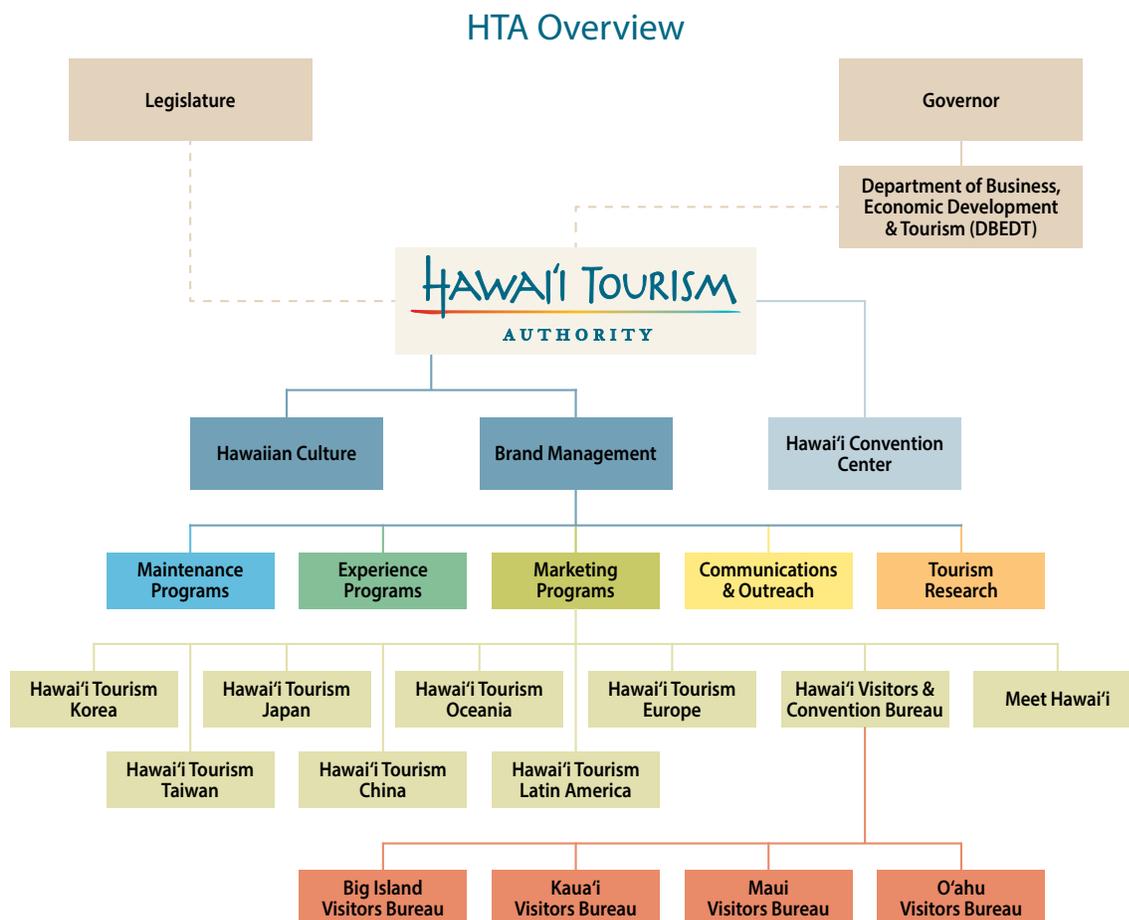


In 1998, the Hawai'i Tourism Authority (HTA) was established through a legislative act as the lead state agency for Hawai'i's visitor industry. This same act also established the Tourism Special Fund – a set percentage of the transient accommodations tax (TAT) collections that is assessed on hotels,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

- Setting tourism policy and direction from a statewide perspective.
- Developing and implementing the state's tourism marketing plan and efforts.
- Managing programs and activities to sustain a healthy visitor industry for the state.
- Developing and monitoring implementation of the Hawai'i Tourism Strategic Plan: 2005-2015 (State TSP).
- Coordinating tourism-related research, planning, promotional and outreach activities with the public and private sectors.
- Perpetuating the Hawaiian culture.
- Distributing visitors across all of the Hawaiian Islands to balance capacity.
- Creating greater collaboration with other state agencies.

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.



2015 Hawai'i Tourism Authority Strategic Plan

The goal of the HTA Strategic Plan is to optimize benefits for Hawai'i and to integrate the interests of visitors, the community and visitor industry. Below are the HTA's objectives and performance indicators for 2015. This provides an overview of the HTA's Brand Management Plan, goals and progress.

2015 Highlights

Jan. 6, 2015
Search begins for new HTA president and CEO



Mar. 8, 2015
Australia's top morning show, SUNRISE, broadcast live for a week in Hawai'i

May 5, 2015
Two new board members, Gerald De Mello and Rodney "George" Kam, join the HTA board of directors



Feb. 16, 2015
Partnership with McDonald's Japan announced



Jan. 29, 2015
HTA releases 2014 visitor data, another record-breaking year for tourism

Mar. 11, 2015
HTA holds its annual spring marketing update

April 7 & 8, 2015
800 students participate in hospitality career development program, LEI



May 28, 2015
HTA board of directors appoints George D. Szigeti as new president and CEO

June 8, 2015
Randy Baldemor joins the HTA as chief operating officer and Marc Togashi promoted to vice president of finance

Objectives:

- To achieve or exceed visitor spending targets.
- To achieve or exceed per person per day (PPPD) spending targets.
- To achieve or exceed air seat targets with managed distribution to all islands.
- To improve and optimize Hawai'i's cruise ship industry to contribute to sustainable growth in Hawai'i's tourism economy.
- To improve the quality of the Hawai'i experience.
- To contribute to a better quality of life for Hawai'i residents.
- To operate efficiently as the state's tourism agency and maximize the return on investment (ROI) of state tax collections.

July 9, 2015

L. Richard "Rick" Fried appointed as the HTA board of directors new chairperson



Sept. 21, 2015
HTA announces launch of online maritime vessel system



Oct. 12, 2015
HTA leadership team visits China with Gov. David Ige to promote Hawai'i and encourage tourism between the two destinations

Nov. 2, 2015
Virgin America commences service from San Francisco to Honolulu

Dec. 3, 2015
Virgin America begins second flight between San Francisco to Kahului

Aug. 27 & 28, 2015
Hawai'i Tourism Conference welcomes more than 1,100 to the Convention Center



July 30, 2015

HTA releases request for proposals (RFPs) for destination marketing and representation services for Oceania, Korea, China, Taiwan, Europe and Southeast Asia

Oct. 20, 2015
US Tennis Association announces the Fed Cup will come to Hawai'i Island in February 2016



Dec. 19, 2015
Jin Air, a Korean low cost carrier, begins service from Seoul to Honolulu



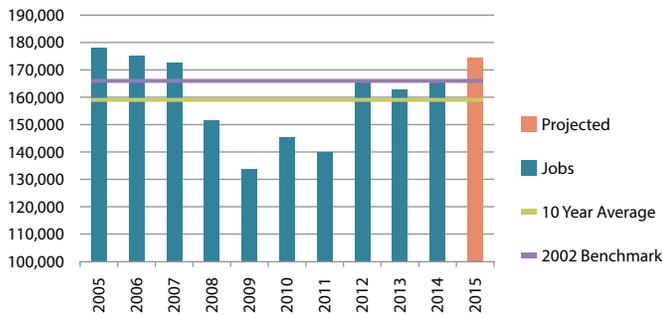
Unemployment Rate

(% of people in the civilian labor force)

Area	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
United States	5.8	6.0	5.5	5.1	4.6	4.6	5.8	9.3	9.6	8.9	8.1	7.4	6.2
Statewide	4.2	4.1	3.4	2.8	2.6	2.8	4.3	7.2	6.9	6.8	6.0	4.8	4.4
Hawaii County	4.8	4.9	4.1	3.5	3.1	3.6	6.0	10.2	9.9	9.9	8.3	6.6	5.5
Honolulu County	4.1	4.0	3.3	2.8	2.5	2.6	3.8	6.0	5.9	5.9	5.4	4.4	4.1
Kauai County	4.6	4.2	3.5	2.8	2.6	2.7	4.9	9.8	8.7	8.7	7.3	5.6	4.9
Maui County	4.1	4.0	3.2	2.7	2.5	3.0	4.9	9.1	8.5	7.9	6.4	5.1	4.5

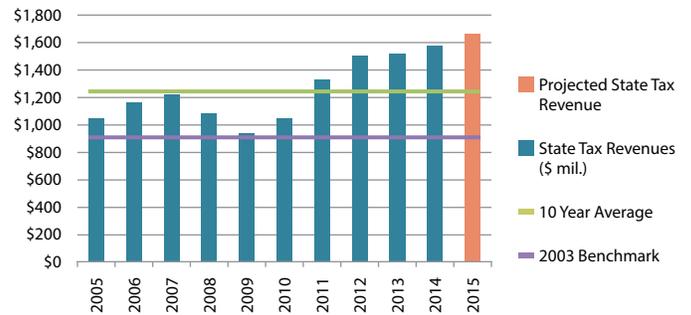
Jobs Generated from Tourism Sector Spending

(HTA Measure of Success)



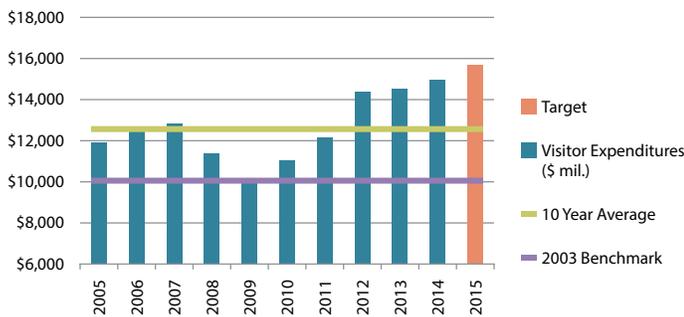
State Tax Revenues (\$ mil.)

(Hawaii TSP Measure of Success: 2003 Benchmark Year)



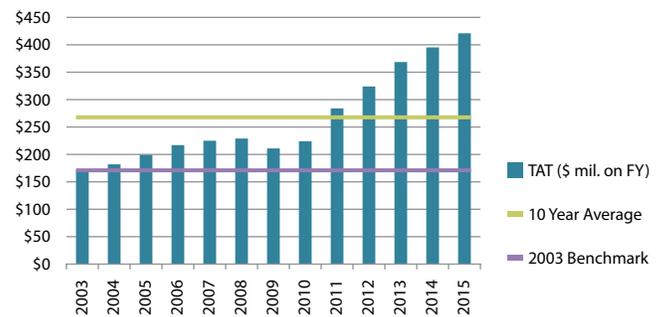
Visitor Expenditures (\$ mil.)

(Hawaii TSP Measure of Success: 2003 Benchmark Year)



Transient Accommodations Tax by FY (\$ mil.)

(HTA Measure of Success)

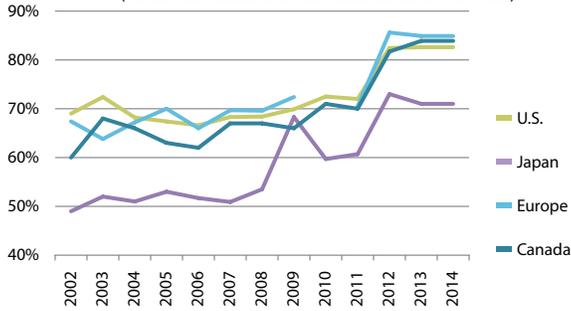


Exchange Rate

	Period Average	Period High	Period Low	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
USD / EUR	0.7492	0.8043	0.6832	0.8043	0.7968	0.7306	0.6832	0.719	0.7546	0.7188	0.7781	0.7532	0.7535
USD / AUD	1.1481	1.3277	0.9658	1.3115	1.3277	1.1947	1.1961	1.2805	1.09	0.9687	0.9658	1.0362	1.1094
USD / JPY	99.18	117.77	79.7	110.09	116.29	117.77	103.42	93.58	87.78	79.7	79.79	97.58	105.84
USD / CNY	6.9359	8.1838	6.1432	8.1838	7.9646	7.5972	6.9404	6.8212	6.7605	6.4544	6.3034	6.1905	6.1432
USD / CAD	1.0779	1.2111	0.9888	1.2111	1.134	1.0738	1.066	1.1411	1.0302	0.9888	0.9996	1.0298	1.1041

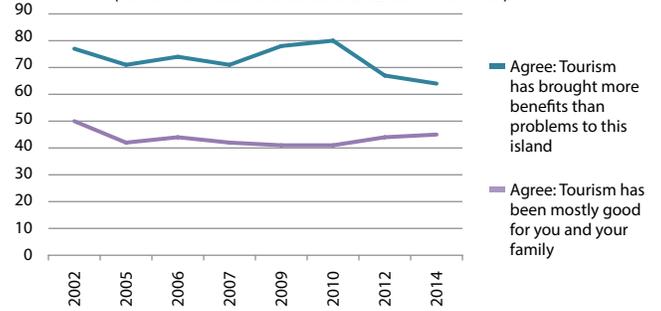
Visitor Satisfaction Survey Results

% Excellent Ratings for most recent trip to Hawai'i
(Hawai'i TSP Measure of Success: 2003 Benchmark Year)



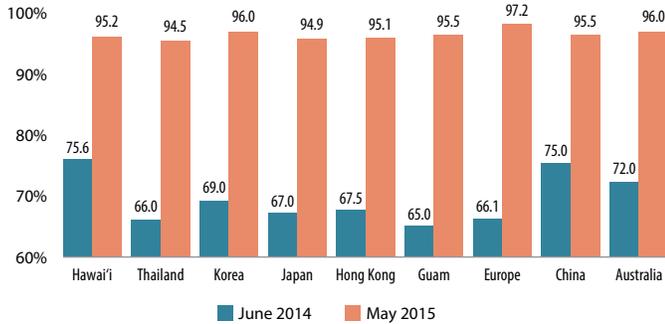
Resident Sentiment

% Agree or Somewhat Agree
(Hawai'i TSP Measure of Success: 2002 Benchmark Year)



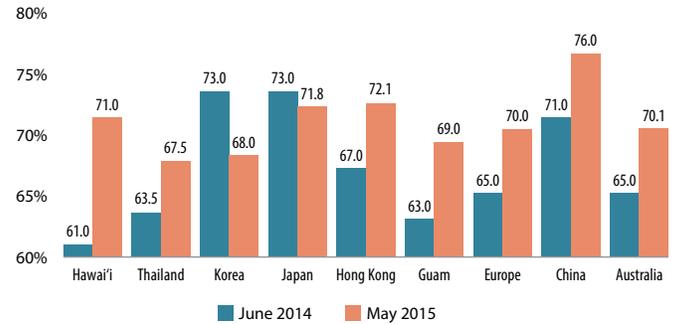
Destination Sentiment: China

Positive Mention Ratio



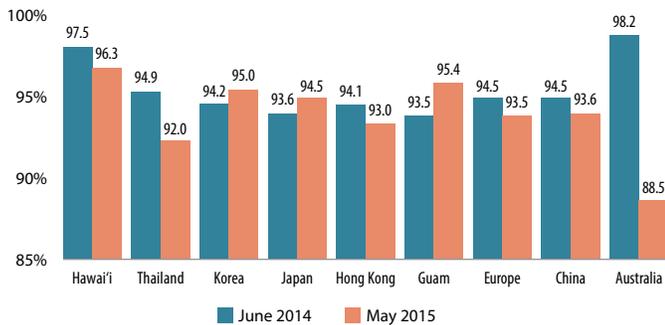
Destination Sentiment: Korea

Positive Mention Ratio



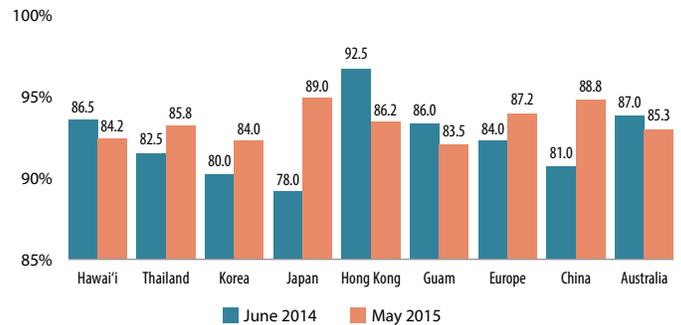
Destination Sentiment: Taiwan

Positive Mention Ratio



Destination Sentiment: Japan

Positive Mention Ratio



Return on Investment: Total Visitor Spending to Marketing Dollars

	2007	2008	2009	2010	2011	2012	2013	2014	2015
North America	338:1	235:1	207:1	216:1	213:1	311:1	317:1	349:1	413:1
Japan	223:1	219:1	180:1	252:1	305:1	311:1	326:1	305:1	314:1
Oceania	270:1	251:1	193:1	283:1	320:1	392:1	621:1	629:1	576:1
Other Asia	198:1	82:1	75:1	112:1	116:1	245:1	269:1	286:1	291:1
Europe	240:1	249:1	1066:1	694:1	629:1	571:1	714:1	1375:1	1147:1
Latin America	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	356:1

Return on Investment: State Tax Revenue Generated to Marketing Dollars

	2007	2008	2009	2010	2011	2012	2013	2014	2015
North America	30:1	21:1	21:1	24:1	23:1	34:1	34:1	37:1	44:1
Japan	20:1	19:1	18:1	27:1	33:1	34:1	35:1	32:1	33:1
Oceania	24:1	22:1	20:1	31:1	35:1	43:1	66:1	67:1	61:1
Other Asia	18:1	7:1	8:1	12:1	13:1	27:1	29:1	30:1	31:1
Europe	21:1	22:1	108:1	76:1	69:1	62:1	76:1	146:1	122:1
Latin America	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	0:1

New HTA Strategic Plan

In 2015, the HTA developed a new strategic plan to replace the previous plan adopted in 2004. The Hawai'i Tourism Strategic Plan 2005-2015 was organized as an overall "state" plan for tourism that designated government agencies or various private-sector groups as the lead agencies responsible for some of the plan's key initiatives.

In reality, the HTA did not have sufficient authority or resources to require others to help carry out that plan, or to constantly monitor and oversee what was being done by others. Therefore, the new Hawai'i Tourism Authority Strategic Plan (HTASP) is an "HTA" plan only, though it recognizes the need to work with partners and stakeholders. This approach is intended to increase the odds the HTASP can be successfully implemented, give clear guidance on priorities, and permit accurate measures of success and progress.

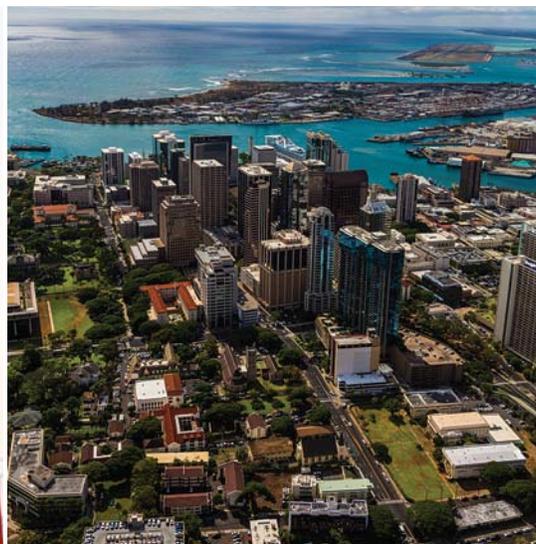
Starting in the summer of 2012, the HTA began to evaluate the previous plan and its top four measures of success and nine strategic initiatives. Since the planning process began, over 100 interviews and work groups were conducted among stakeholders from the visitor industry, local community, government leaders, and HTA board and staff. The HTA assessed the potential trends and conditions of tourism in Hawai'i in the 2015 to 2020 timeframe. Finally, the HTASP strategies were drafted by the HTA staff with input and direction from the HTA Board.

The purpose of the HTA Strategic Plan is to guide the organization in addressing issues and creating opportunities that will move Hawai'i's visitor industry forward in a sustainable manner with economic goals, cultural values, preservation of natural resources, community desires and visitor industry needs.

There are four primary goals of the new HTASP:

- Improve the integrity of the destination.
- Ensure stable economic benefits.
- Elevate Hawai'i's value perception.
- Strengthen the HTA's reputation.

The HTASP was approved by the HTA board of directors in 2015 on Oct. 29 prior to its implementation in 2016.



New Measures of Success

As part of the HTA's new Strategic Plan, measures were developed to ensure progress will be tracked and outcomes met.

Goal	Measure of Success
Improve the Integrity of the Destination	Sustain the positive net benefits of tourism as measured by the percentage of residents who agree that tourism has brought more benefits than problems.
Ensure Stable Economic Benefits	Increase economic activity generated by visitors as measured by visitor-related gross domestic product.
Elevate Hawai'i's Value Perception	The Hawaiian Islands brand remains competitive as measured by the percentage of potential visitors considering a trip to Hawai'i.
Strengthen Hawai'i's Reputation	The perception of the HTA as a leader as measured by the percentage of organizations in the tourism industry that recognize the HTA as the leading state agency for tourism.



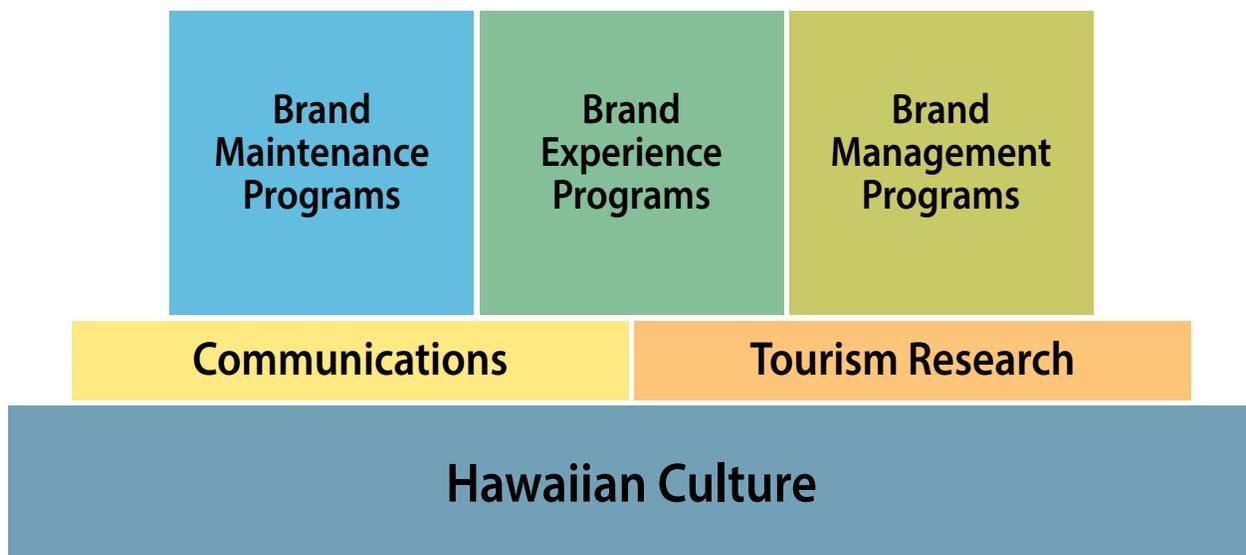
Brand Management Plan

One of the main initiatives under the HTA's Brand Management Plan is developing and supporting programs and events that deliver the destination brand promise. The HTA coordinates with its global contractors, visitor industry partners and community stakeholders to ensure that its marketing and communications authentically promote Hawai'i's unique and distinctive products, including natural resources, Hawaiian culture and multi-cultures.

The HTA's programs are categorized under five core areas:

- **Maintaining Brand:**
Programs that address and impact the long-term sustainability of the destination as it relates to the fundamental elements that define Hawai'i's people, place and culture.
- **Brand Experience:**
Programs that deliver a unique experience (i.e., festivals and events) that align with Hawai'i's people, place and culture. The HTA creates, develops and/or supports these programs.
- **Brand Management:**
Destination marketing and support to attract visitors to the Hawaiian Islands.
- **Communications:**
Programs that facilitate interaction among stakeholders, support brand maintenance, brand experience and brand management efforts, and increase awareness for the HTA as a leader of Hawai'i's visitor industry.
- **Tourism Research:**
Programs that provide information to educate and facilitate data-driven decision making for all stakeholders and that support brand maintenance, brand experience and brand management efforts.

**Hawaiian culture is a foundation that permeates throughout all of the HTA's programs and is a value system to guide the HTA.*



Maintaining the Brand

Overview

The purpose of the Maintaining Brand area is to support and sustain programs that help to maintain the brand promise into the future. These programs address and impact the long-term sustainability of the destination as it relates to the fundamental elements that define the Hawaiian Islands: people, place and culture.

Programs

- **Hawaiian Culture**
Perpetuates Hawaiian culture for the long-term.
- **Natural Resources**
Protect and preserve Hawai'i's natural environment for the long-term.
- **Career Development**
Support academic pathways for Hawai'i's youth with the goal of keeping homegrown talent in the state to provide a more authentic experience for visitors.
- **Safety and Security**
Educate visitors pre- and post-arrival, assist visitors in need, and serve as the lead tourism agency for crisis management.



Hawaiian Culture

The HTA supports efforts to perpetuate the Hawaiian culture and believes that its survival is critical in maintaining Hawai'i's unique identity.

2015 Highlights:

- Funded 33 projects statewide through HTA's Kūkulu Ola: Living Hawaiian Culture Program focused on supporting community initiated programs that help to perpetuate the Hawaiian culture.
- Began posting the agendas for the HTA's monthly board meetings in both Hawaiian and English as part of HTA's ongoing efforts to incorporate both official languages of the State into the agency.
- Honored the paniolo, Hawaiian cowboys, at the annual HTA Legacy Luncheon as a part of the Hawai'i Tourism Conference.
- Continued a decade long relationship with the Native Hawaiian Hospitality Association (NaHHA) in helping to bridge the Hawaiian community with the visitor industry.

2016 Key Activities:

- The Ma'ema'e program, which helps to educate the HTA's industry partners, media and stakeholders about Hawai'i, including proper use of Hawaiian language, image usage guidelines, a style and resource guide, and dos and don'ts, will be revamped and expanded.
- Increase collaboration with the Signature Hawaiian Festivals and Events to improve their capacity and quality of programming.
- Initiate a program to deploy more cultural representatives, entertainers and practitioners in market to various trade shows and missions.



Natural Resources

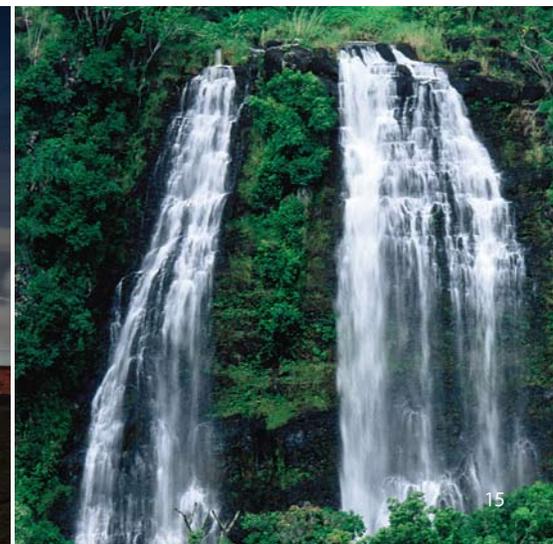
The Natural Resources program at the HTA was established to support and preserve what makes the Hawaiian Islands unique. The HTA plays an important role in supporting community led environmental initiatives, and it partners with the Department of Land and Natural Resources (DLNR) to maintain parks and trails, as well as lead special initiatives that directly impact the natural environment in Hawai'i.

2015 Highlights:

- Funded 32 projects statewide through HTA's Natural Resources Community Program focused on supporting community initiated programs that help to maintain and care for Hawai'i's unique environment.
- Worked with DLNR to assure that \$3 million of the TAT goes to maintaining parks and trails to offset visitor impacts.
- Began working with other non-profit and private organizations to support conservation efforts.

2016 Key Activities:

- Further improving on the HTA and DLNR partnership to provide insight on specific areas that need attention.
- Launch of a new program to focus on areas that have specific visitor impact.
- Working with the Hawai'i Eco-Tourism Association to create a certification program to ensure tour operators are responsible when doing business in Hawai'i's environment.



Career Development

The HTA continues to engage Hawai'i's youth and provide them with opportunities to interact with professionals and executives from businesses that make up Hawai'i's hospitality industry. Through programs like ClimbHI's LEI – Leadership, Exploration and Inspiration – high school students are able to see the exciting career paths available in the hospitality industry. The HTA also collaborates with educational organizations and programs to help prepare the next generation of industry professionals through cultural and management training.

2015 Highlights:

- The LEI program welcomed more than 800 students from 24 high schools and expanded to Kaua'i this year.
- Two hundred high school and college students participated in the Hawai'i Tourism Conference.
- Two public service announcements about career opportunities in the hospitality industry were created and broadcast on OC16 for the benefit of Hawai'i's youth.

2016 Key Activities:

- A full version of the LEI program, currently available on O'ahu, Maui and Kaua'i, will be launched on Hawai'i Island with some customizations to accommodate unique needs of this island.
- Online training will be developed for the International Awareness and Hawai'i Hospitality programs.



"Together, over the past four years, ClimbHI and the Hawai'i Tourism Authority have built the state's largest workforce development program centered around our number one industry, tourism, that exposes students to current leaders and future opportunities, inspiring the students to lead Hawai'i and the world into the future."

*- Julie Morikawa,
ClimbHi, President*



Safety and Security

The HTA continues to support agencies and organizations that are responsible for ensuring the safety and security of our visitors. Visitor Assistance Programs (VAP) in all four counties provide assistance and aloha to visitors who have been affected by a crime or other adversities during their stay. Also, the HTA continues to explore ways to reach visitors with safety prevention messages, including travel safety tips available online at travelsmarthawaii.com.

2015 Highlights:

- During the first nine months of 2015, VAPs assisted 2,997 individuals through 1,379 cases.
- Partnered with rental car companies to feature the HTA's Travel Smart and Safety e-Brochure on its reservation confirmation page.
- Expanded distribution of safety messages including the HTA's major marketing area contractors, tour operators and associations, and by linking to Travel Smart and Safety e-Brochure in relevant collateral.

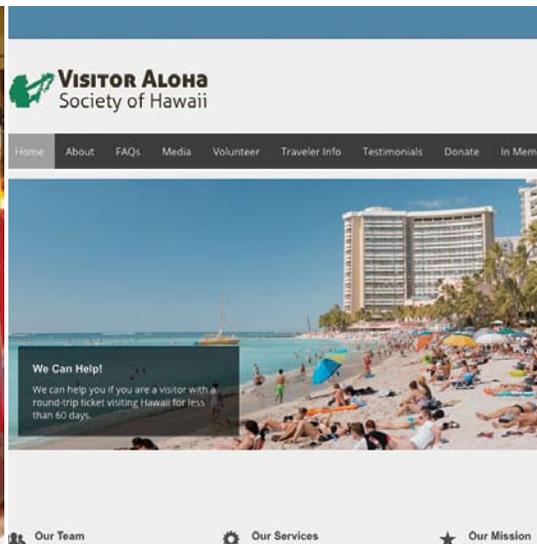
2016 Key Activities:

- Develop a safety message for an in-room hotel welcome video.
- Develop a safety message for a transportation welcome video.
- Participate and support the newly created Ocean/Water Safety Prevention Advisory Committee.



"We are grateful to VASH for their ongoing assistance while I was in the hospital. We will always remember your care and support."

*- William Hacock,
visitor assisted by VASH*



Brand Experience

Overview

The purpose of the Brand Experience area is to create, develop and support programs and projects that deliver unique experiences that align with Hawai'i's people, place and culture.

Programs

- **Signature Events**
Major events that the HTA wants to align with its destination brand.
- **Product Development**
Programs and/or events that the HTA wants to create and/or cultivate.
- **Greetings Program (Kāhea)**
Programs that create a sense of place at visitor entry and exit points.



Product Development

In an effort to create unique travel experiences, the Product Development program fosters and cultivates programs that provide visitors with a variety of festivals and events. The HTA will create projects or provide support to selected projects in order to make the event self-sustaining, where its support is no longer needed. The County Product Enrichment Program (CPEP), which supports programs that are initiated by community organizations throughout the four counties, showcases the diversity of the Hawaiian Islands with visitor and resident participation.

2015 Highlights:

- Provided support to a total of 89 CPEP projects statewide, of which 15 were new to 2015 CPEP.
- For a second year, held the May Day event in Waikiki with a live concert and music by Danny Kaleikini.
- Supported Nā Hōkū Hanohano Awards and Music Festival, held during the slower spring shoulder period.

2016 Key Activities:

- Increase the number of new CPEP projects supported in 2016.
- Additional marketing efforts for festivals and events.
- Support Mele Mei with a new contractor to coordinate the program in partnership with Hawai'i Academy of Recording Arts (HARA).



"While many 'ukulele fans plan their vacations around the 'Ukulele Festival, other visitors are simply drawn to the energizing sounds of 'ukulele playing coming from Kapi'olani Park. Tourism not only boosts 'Ukulele Festival attendance, but also Hawai'i's 'ukulele manufacturers."

*- Roy Sakuma,
'Ukulele Festival, President*

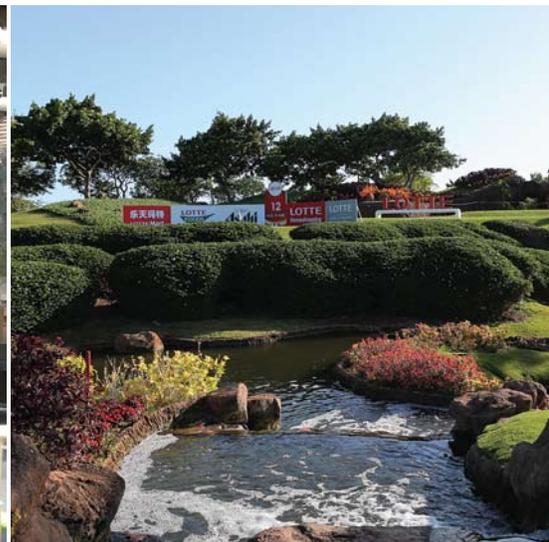


Signature Events

The HTA's Signature Events program supports Native Hawaiian Festivals, Major Festivals and Sports Events. Events that fall under this program are meant to stimulate visitor demand, and they are events with which the HTA wants to align its brand.

In 2015, the HTA supported more than 21 programs through Signature Events. Some of the programs include:

- Kona Coffee Cultural Festival
- Kōloa Plantation Days
- Maui Film Festival at Wailea
- Pan-Pacific Festival
- Honolulu Festival
- Hawai'i Food and Wine Festival
- Hawai'i International Film Festival
- Diamond Head Classic
- Hyundai Tournament of Champions
- Ironman World Championship
- Lotte Championship
- Mitsubishi Electric Championship at Hualālai
- Hawai'i Sand Volleyball Festival 2015
- Hawai'i Bowl
- Sony Open in Hawai'i
- Xterra World Championship
- Xterra Trail Run World Championship
- Maui Jim Maui invitational
- Kaua'i Marathon
- HCRA State Championships (HCRA - Hawaiian Canoe Racing Association)
- Lava Lava Festival - 'Ohana Cup 2015



Major Festivals

The HTA's Major Festivals are a diverse line-up of events that help to showcase Hawai'i's people, place and culture. These festivals give visitors and residents a chance to interact and experience the diverse make-up of ethnicities that coexist in the islands and the cuisine, music and traditions that make each one unique.

2015 Highlights:

- In 2015, the Pan Pacific Festival welcomed nearly 110,000 visitors and residents to its series of events, including its rekindled Bon Dance.
- The Hawai'i Food and Wine Festival expanded its reach on Maui, in addition to holding events on O'ahu and Hawai'i Island.
- During the Hawai'i International Film Festival in the Fall, the event hosted the Asia Pacific Entertainment Finance Forum (APEFF) where content creators and innovators collaborated with financiers and facilitators on potential projects.

2016 Key Activities:

- The HTA will be adding POW! WOW! Hawai'i as a signature event in 2016. POW! WOW! Hawai'i is a week-long event in February highlighting the unique Kaka'ako urban district.
- The Pan Pacific Festival will launch a new sports event, the Pan Pacific Hawaiian Tennis Festival.
- Event organizers from the King Kamehameha Celebration Commission are meeting with the Pan Pacific Festival to discuss how both events can support one another.

"Visitors to Hawai'i are increasingly interested in the authenticity of their experience. No longer satisfied with solely beautiful scenery and a cold drink, visitors want to explore the 'real' Hawai'i."

- Allan Farwell,
Hyatt Regency Maui Resort
and Spa, General Manager



Native Hawaiian Festivals

The HTA supports numerous Native Hawaiian Festivals through the Major Festivals and Product Development programs. In an effort to support events that highlight Hawai'i's indigenous culture, the HTA continues to be the main sponsor of 14 Native Hawaiian Festivals statewide.

2015 Highlights:

- Major sponsor of the statewide Aloha Festivals and King Kamehameha Celebration.
- Major sponsor of other major Hawaiian festivals including the Prince Kūhiō Celebration, Prince Lot Hula Festival and Merrie Monarch Festival.

2016 Key Activities:

- Continue to support Native Hawaiian Festivals that perpetuate the Hawaiian culture in 2016.
- Continue to assist the Native Hawaiian festivals in building capacity, providing for education on marketing events, planning and execution, as well as sponsorship development.

"The HTA enables the Hawai'i Island Festival to share the aloha with visitors by teaching and sharing our rich host culture as well as create long lasting memories and desire for them to return to Hawai'i."

- Moani Akana,
Aloha Festivals, Hawai'i
Island, Program Director



Sports

Hawai'i continues to be a premier sports destination for both spectator and participatory sporting events thanks to Hawai'i's year-round warm climate. The HTA continued to support a variety of sporting events that are popular amongst Hawai'i's major market areas, including football, golf, rugby, soccer and surfing.

2015 Highlights:

- Partnered with Spike and Serve to support the Pac Rim Sand Volleyball Championships.
- Supported the Fox Sports Weekend in December, which included basketball games played at Pearl Harbor and live broadcasts during NFL Sunday.

2016 Key Activities:

- Hawai'i will host a preseason National Rugby League training camp and rugby game televised nationally in Australia.
- The United States Tennis Association (USTA) will bring the Fed Cup to Hawai'i Island, featuring the U.S. and Poland.



Greetings

The HTA partnered with the State Department of Transportation (DOT) to continue to support the greetings programs at the major airports. Destination Hilo, Destination Kona Coast, the LahainaTown Action Committee and the Kaua'i Office of Economic Development coordinated greeting activities at the cruise ship piers. The program helped to create a sense of place for the State's visitors. The tone and mood set upon arrival and departure play an integral role in creating lasting memories, and is just one more way to engage visitors and highlight the unique culture and offerings of the islands.

2015 Highlights:

- Support for the Harbor Greetings program was reinstated in Hilo, Kona, Lahaina and Nāwiliwili.
- Continued the statewide Hawaiian music and hula at the airports to welcome home kama'āina and greet malahini.

2016 Key Activities:

- Greetings will be updated and enhanced at Hilo, Kona, Lahaina and Nāwiliwili harbors.
- Harbor greetings will be implemented at Kahului and Honolulu.
- Airport programs will be developed to build on the significant first and last experience for visitors and kama'āina.



Access

Access and the ability to travel to and from the Hawaiian Islands is an essential area for the HTA to ensure there is sufficient air and cruise capacity available to meet demand. Air seats are projected to reach an all-time high for 2015, with the State's air service network currently covering an unprecedented diversity of domestic and international overseas markets. The HTA also continues to look for ways to grow the State's cruise market, which contributes more than \$400 million in direct spending and supports 6,400 jobs.

2015 Highlights:

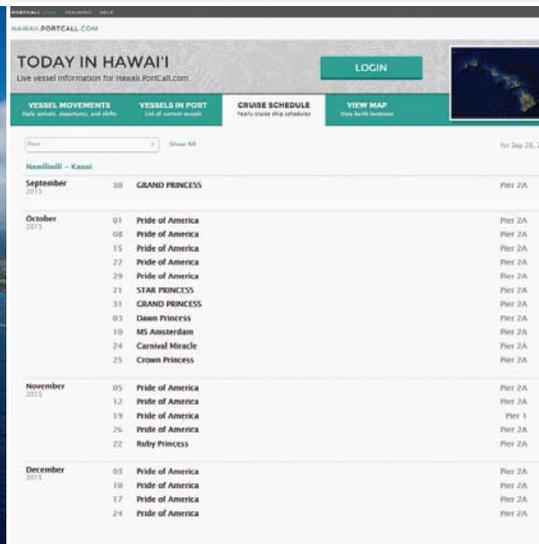
- Hawai'i is on track to end 2015 with a record 11.8 million scheduled air seats into the State with new airlines Virgin America and Jin Air beginning service at the end of 2015.
- The HTA hosted the first Airline Summit with executives from 11 airlines meeting with Hawai'i officials to discuss routes, scheduling and more.
- The launch of the cruise scheduling system, an electronic system to be used across all State ports to assist with the ability and accessibility for cruise lines to schedule arrivals in the State.

2016 Key Activities:

- The HTA will work with contractors to maintain demand to sustain the record airlift to the State and continue to improve the cruise scheduling at all Hawai'i ports.
- AirAsia X will begin service between Honolulu and Kuala Lumpur, Malaysia, a major Southeast Asian hub.
- Initiate contract with a new cruise consultant to improve Hawai'i's positioning as a lucrative cruise destination.

Air Seats Outlook

Market	2014 Total	2015 Projected	% Change
Domestic	7,536,304	8,146,463	8.1%
International	3,634,428	3,686,077	1.4%
Total	11,170,732	11,832,540	5.9%



Major Market Management

2015 is on track to be the fourth consecutive year of record-breaking growth in both arrivals and spending for the state's lead economic driver. In order to ensure the sustainability of Hawai'i's visitor industry, the HTA's global marketing contractors have been working hard to maintain the level of growth Hawai'i has experienced over the last few years.

Currently, the HTA has representation by contractors in a total of eight (8) major marketing areas (MMA), including: Hawai'i Visitors and Convention Bureau (HVCB), North America; Hawai'i Tourism Japan (HTJ); Hawai'i Tourism Oceania (HTO), Australia and New Zealand; Hawai'i Tourism Korea (HTK); Hawai'i Tourism China (HTC); Hawai'i Tourism Taiwan (HTT); Hawai'i Tourism Europe (HTE), United Kingdom, Germany, Switzerland, France, and Italy; and Hawai'i Tourism Latin America (HTLA), Brazil, Mexico and Argentina.

In 2015, the HTA issued requests for proposals (RFPs) for representation in the following MMAs: Oceania, Korea, China, Taiwan and Europe, emphasizing greater performance and accountability for the HTA's contractors.

The HTA contractors are responsible for developing strategic plans and cooperative programs, including advertising, public relations, promotions, travel trade marketing, education and training, and stakeholder communications and relations.



Visitor Statistics

Total**	2014 Total	% Change*	2015 Target	% Change*
Arrivals	8,308,114	1.6%	8,591,480	3.4%
Expend. (\$ mil.)***	\$14,821.0	2.8%	\$15,580.1	5.1%
U.S. West				
Arrivals	3,286,677	2.3%	3,345,000	1.8%
Expend. (\$ mil.)	\$4,992.2	3.9%	\$5,278.6	5.7%
U.S. East				
Arrivals	1,734,794	1.9%	1,754,200	1.1%
Expend. (\$ mil.)	\$3,736.0	5.4%	\$3,841.8	2.8%
Canada				
Arrivals	524,565	1.5%	562,640	7.3%
Expend. (\$ mil.)	\$1,076.9	-0.6%	\$1,170.9	8.7%
Japan				
Arrivals	1,511,699	-0.4%	1,568,830	3.8%
Expend. (\$ mil.)	\$2,396.6	-3.6%	\$2,513.0	4.9%
Other Asia				
Arrivals	368,502	10.0%	409,620	11.2%
Expend. (\$ mil.)	\$807.6	13.6%	\$901.0	11.6%
Oceania				
Arrivals	371,072	4.4%	401,300	8.1%
Expend. (\$ mil.)	\$895.8	2.1%	\$921.2	2.8%
Europe				
Arrivals	143,057	4.6%	153,130	7.0%
Expend. (\$ mil.)	\$342.2	6.4%	\$344.2	0.6%
Latin America				
Arrivals	30,095	-0.6%	35,000	16.3%
Expend. (\$ mil.)	\$94.6	27.6%	\$89.1	-5.8%

* Year-over-year growth

** Total arrivals and expenditures include air and cruise statistics. All others refer to air arrivals only.

***Does not include supplemental business expenditures.

North America

North America is the largest market for visitors to the Hawaiian Islands with the U.S. and Canada making up 67 percent of arrivals to the state in 2014. Supported by increases in airlift from North America, arrivals from the region remained strong. The HTA continued to work with the Hawai'i Visitors and Convention Bureau (HVCB), its marketing contractor for North America, to reach aggressive targets set by the HTA to retain market share and support the air seat inventory from the region.

2015 Highlights:

- HVCB implemented a social media campaign utilizing #LetHawaiiHappen that achieved more than 163 million impressions across Instagram, Twitter and various video channels, such as YouTube and Vimeo, in the first half of the year.
- Coordinated the one-hour long special, "The Trip 2015," with the Travel Channel highlighting the Hawaiian Islands as the featured destination, in which more than 600,000 viewers tuned in to its premiere.
- Honored at the TravelAge West WAVE Awards for "Destination with the Highest Client Satisfaction USA" and "Tourism Board Providing the Best Travel Agent Support."

2016 Key Activities:

- Hawai'i Target Traveler (HTT) "Never-Beens" are the focus of HVCB's 2016 marketing efforts.
- A new messaging element will be added to the successful #LetHawaiiHappen campaign.
- Build upon a new concept introduced in the 2015-2016 Travel Trade Operative Media Marketing Program.



"The HTA's support of Pleasant Holidays and our distribution channels allows for continued growth for Hawai'i's tourism industry. We have close to 500 employees, with more than 100 based in the Hawaiian Islands. Tourism is our business."

- Jack Richards,
Pleasant Holidays,
President and CEO



Visitor Statistics

U.S. West	2014 Total	2015 Target	% Change*	2015 YTD**	% Change*
Arrivals	3,286,677	3,345,000	1.8%	2,911,283	7.2%
Expend (\$ mil.)	\$4,992.2	\$5,278.6	5.7%	\$4,376.5	6.3%
PPPD Spending	\$160.7	\$163.7	1.9%	\$162.6	1.1%
Air Seats***	6,681,786	7,218,375	8.0%	6,017,065	8.4%

U.S. East	2014 Total	2015 Target	% Change*	2015 YTD**	% Change*
Arrivals	1,734,794	1,754,200	1.1%	1,502,596	2.3%
Expend (\$ mil.)	\$3,736.0	\$3,841.8	2.8%	\$3,082.6	-1.4%
PPPD Spending	\$206.7	\$207.5	0.4%	\$199.5	-2.9%
Air Seats***	854,518	928,088	8.6%	769,635	9.1%

Canada	2014 Total	2015 Target	% Change*	2015 YTD**	% Change*
Arrivals	524,565	562,640	7.3%	410,533	0.3%
Expend (\$ mil.)	\$1,076.9	\$1,170.9	8.7%	\$862.8	1.4%
PPPD Spending	\$158.9	\$161.7	1.8%	\$166.0	2.0%
Air Seats***	399,960	460,410	15.1%	363,430	18.0%

* Year-over-year growth **YTD through October 2015 ***Source: Scheduled seats from Diio schedules

Japan

Japan remains the largest international market for Hawai'i's visitor industry, making up 18 percent of total arrivals to the state in 2014. While arrivals remained steady through 2015, the strengthening U.S. dollar against the Japanese yen caused spending from the market to drop. The HTA's marketing partner, Hawai'i Tourism Japan (HTJ), continues to work on creative and innovative ways to market the Hawaiian Islands to keep Hawai'i top-of-mind.

"Hawai'i's beauty, history, culture, natural bounty, climate and people of Hawai'i attract many visitors from around the world. We expect that the HTA's biggest mission is to build the Hawai'i brand, which is incredibly valuable for us in supporting Hawai'i."

- Tsukasa Harafuku,
JTB Hawaii,
President and CEO

2015 Highlights:

- Partnered with McDonald's Japan for a campaign featuring a Hawaiian specialty menu, contests and giveaways.
- HTJ opened 10 satellite offices in five cities in partnership with various partners to reach consumers across Japan.
- HTJ conducted its first stand alone Hawai'i Expo in July attracting more than 13,000 attendees and generating nearly \$1 million in ad value.

2016 Key Activities:

- A promotion to attract families with popular anime character Youkai Watch will continue through 2016.
- Additional focus on drawing visitors to the neighbor islands through partnerships with online influencers, bloggers and social media.
- Promote Hawai'i in conjunction with a new Japanese law that mandates employees to take five days of vacation beginning in 2016.

Visitor Statistics

Japan	2014 Total	2015 Target	% Change*	2015 YTD**	% Change*
Arrivals	1,511,699	1,568,830	3.8%	1,252,309	-0.9%
Expend (\$ mil.)	\$2,396.6	\$2,513.0	4.9%	\$1,798.1	-10.0%
PPPD Spending	\$273.4	\$276.3	1.0%	\$244.2	-10.3%
Air Seats***	2,015,905	1,949,648	-3.3%	1,637,321	-3.3%

*Year-over-year growth **YTD through October 2015 ***Source: Scheduled seats from Diio schedules



Korea

The Korea market remained steady through most of 2015. As visitors from Korea are looking for more tailored vacations, the HTA's marketing contractor, Hawai'i Tourism Korea, has been working hard to find the best ways to target Korean travelers.

The entry of Jin Air at the end of 2015 will help to attract a new market, primarily young families and young professionals with disposable incomes who may not have considered a Hawaiian vacation before.

2015 Highlights:

- Popular Korean show "Oh! My Baby" filmed four episodes in the State reaching an audience of approximately 3 million viewers.
- Promotions throughout Korea for the world premiere of "Jurassic World."
- Celebrity chef, Changwook Jung, was appointed as an ambassador to help promote and position the Hawaiian Islands.

2016 Key Activities:

- Capitalize on the growing popularity of the edu-tourism market for Korean parents and students.
- Focus on new growing niche markets for the meetings, conventions and incentives market.
- Partner with other marketing contractors in Asia to draw a popular K-pop group to the State.

"We can see growth of the younger generation and family travelers from Korea to Hawai'i. Honeymoon travel to Hawai'i is also increasing, as Hawai'i is gaining popularity and sometimes beating out Thailand, Bali and Maldives."

- Jungwu Park,
Jin Air, Team Manager,
Sales Planning and Team Support

Visitor Statistics

Korea	2014 Total	2015 Target	% Change*	2015 YTD**	% Change*
Arrivals	178,090	190,000	6.7%	136,208	-7.5%
Expend (\$ mil.)	\$334.8	\$359.7	7.4%	\$271.5	0.6%
PPPD Spending	\$271.4	\$268.6	-1.0%	\$286.34	7.6%
Air Seats***	334,360	294,824	-11.8%	247,859	-13.1%

*Year-over-year growth **YTD through October 2015 ***Source: Scheduled seats from Diio schedules



☆☆☆☆☆
"올 여름을 책임질 최고의 오락영화!"
-LOGAN-
"모든 것을 뛰어넘는 놀라운 영화!"
-JEREMY MARQUE-
쥘리아 월드
ALOHA FRIDAY EVENT
정창욱 앞치마를 드립니다.
EVENT INFO
* 스페셜 경품은 하와이안 항공과 아웃리거 리조트가 제공합니다.



China

Visitor arrivals and spending from the China market continues to grow, with spending outpacing arrivals. Chinese visitors remain the highest per person per day spending of all visitors to Hawai'i. The HTA's marketing contractor, Hawai'i Tourism China (HTC), with offices in Beijing, Shanghai, Guangzhou and Chengdou, focused its efforts on positioning Hawai'i as a desired stand-alone vacation destination. The recent 10-year multi-entry U.S. visa policy is expected to help attract repeat visitors from China to the Hawaiian Islands.

2015 Highlights:

- Launched a cultural alliance program with Global Home Shopping Channel (GHS) and CYTS to promote the Hawaiian Islands.
- Partnered with airlines to jointly promote Hawai'i and help improve load factor, as both Air China and China Eastern Airlines added seasonal flights in summer months to meet increased demand.
- Worked with the Meet Hawai'i team and the 'Elele Program to win the bid for the Asia Oceania Geosciences Society 2018 meeting (AOGS 2018).

2016 Key Activities:

- Implement creative direct consumer campaigns.
- Increase online and social media presence in China.
- Attract more television and movie programs to feature the Hawaiian Islands.



"Kalākaua Avenue is one of the most successful retail destinations in the world, along with Fifth Avenue, Rodeo Drive, Michigan Avenue, Avenue Montaigne in Paris and the Ginza in Tokyo. Our location establishes a vital relationship with the domestic and international visitors, especially when considering their anticipation of world-class Hawaiian experience."

- Helene "Sam" Shenkus,
Royal Hawaiian Center,
Marketing Director

Visitor Statistics

China	2014 Total	2015 Target	% Change*	2015 YTD**	% Change*
Arrivals	160,077	180,740	12.9%	146,971	6.2%
Expend (\$ mil.)	\$408.6	\$463.9	13.5%	\$355.0	2.3%
PPPD Spending	\$398.9	\$397.0	-0.5%	\$387.86	-1.2%
Air Seats***	138,489	150,390	8.6%	127,344	9.8%

*Year-over-year growth **YTD through October 2015 ***Source: Scheduled seats from Diio schedules



Taiwan

Due to the depreciation of the Taiwanese dollar against the U.S. dollar and increased competition from short-haul destinations, there was a significant decline of visitors and spending in Hawai'i. In an effort to draw visitors to the Hawaiian Islands, Hawai'i Tourism Taiwan (HTT), the HTA's marketing contractor for the region, is focusing on implementing creative consumer campaigns to bring exposure to the destination.

2015 Highlights:

- Hawai'i Run attracted more than 5,300 runners and drew attention to the Hawaiian Islands.
- A slogan campaign with celebrity ambassador Weber Yang was launched.
- Joint promotions with Shiseido and W Hotels generated more than \$400,000 in media value.

2016 Key Activities:

- Direct consumer campaigns through creative efforts.
- Enhance social media platforms to increase online exposure for Hawai'i.
- Collaborate closely with airlines in order to increase seat capacity.

"Tourism allows us to share the story of the USS Missouri and her special place in history with visitors from around the world. We have a growing number of visitors come tour the Missouri from Taiwan, Korea, Japan, China, Australia and Europe in recent years. And we believe that the HTA's emphasis on growing these visitor markets is directly responsible."

- Michael Carr,
USS Missouri Memorial
Association,
President and CEO

Visitor Statistics

Taiwan	2014 Total	2015 Target	% Change*	2015 YTD**	% Change*
Arrivals	20,458	28,000	36.9%	14,229	-20.3%
Expend (\$ mil.)	\$34.5	\$49.2	42.8%	\$26.50	-12.2%
PPPD Spending	\$203.7	\$214.00	5.0%	\$236.26	16.0%
Air Seats***	44,583	31,308	-29.8%	26,340	-32.6%

*Year-over-year growth **YTD through October 2015 ***Source: Scheduled seats from Diio schedules



Oceania

The strengthening U.S. dollar started to have an impact on spending from the Oceania region, Australia and New Zealand, though arrivals from the market remained steady. The HTA's marketing partner, Hawai'i Tourism Oceania (HTO) targets visitors through creative campaigns, training and media outreach.

2015 Highlights:

- HTO launched an incentive for the Agents of Aloha FAM, which was promoted in both Australian and New Zealand trade publications reaching more than 4,000 travel agents.
- Australia's most popular show, "Sunrise," broadcasted live for a week and had more than 3 million views from Australia.
- Air New Zealand partnered with HTO in an effort to promote Hawai'i, which resulted in an increase of 231 percent of passengers booked on flights to the islands.

2016 Key Activities:

- Introduce a number of new digital marketing activities in the market.
- Increase consumer branding and promotional activities.
- Expand partnerships with the travel trade industry.



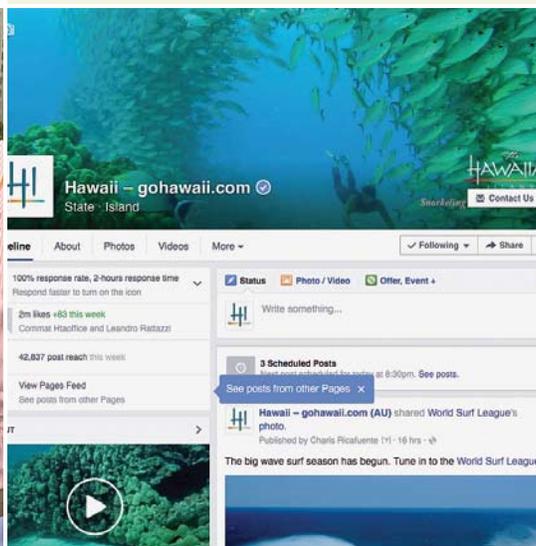
"Even with the recent exchange rate declines, the future of tourism from Oceania to Hawai'i is bright. Airline competition and decreased fuel costs have contributed to create extremely competitive airfares from four key regional gateways. Hawai'i is now being seen by more of our Oceania visitors as a regular 'repeat destination' with a neighbor island stay providing something new and fresh."

- Darragh Walshe,
Hawai'i Tourism Oceania,
New Zealand Manager

Visitor Statistics

Oceania	2014 Total	2015 Target	% Change*	2015 YTD**	% Change*
Arrivals	371,072	401,300	8.1%	337,816	9.2%
Expend (\$ mil.)	\$895.8	\$921.2	2.8%	\$802.03	9.9%
PPPD Spending	\$259.4	\$246.3	-5.1%	\$249.59	-3.1%
Air Seats***	432,280	503,300	16.4%	417,855	18.0%

*Year-over-year growth **YTD through October 2015 ***Source: Scheduled seats from Diio schedules



Europe

While the distance to travel to the Hawaiian Islands remains a challenge in attracting more visitors from Europe, when they come to Hawai'i, they tend to stay longer than other visitors. The HTA's marketing contractor, Hawai'i Tourism Europe (HTE) targets visitors from the countries of the United Kingdom and Germany, the two top source markets in the European Major Market Area (U.K., Germany, France, Italy and Switzerland).

2015 Highlights:

- HTE initiated, organized and realized four trade FAM trips and two press trips to the Hawaiian Islands to provide greater exposure and understanding of the destination.
- In partnership with Universal Studios, Delta Air Lines and Kiss Radio, HTE ran a promotion for a trip to Hawai'i in conjunction with the release of "Jurassic World."
- Partnered with major tour groups and publications throughout Europe to drive interest in the Hawaiian Islands.

2016 Key Activities:

- Full destination representation in the Europe Major Market area beyond the current general sales agent.
- Increase consumer branding and promotional activities.
- Expand partnerships with the travel trade in Europe.



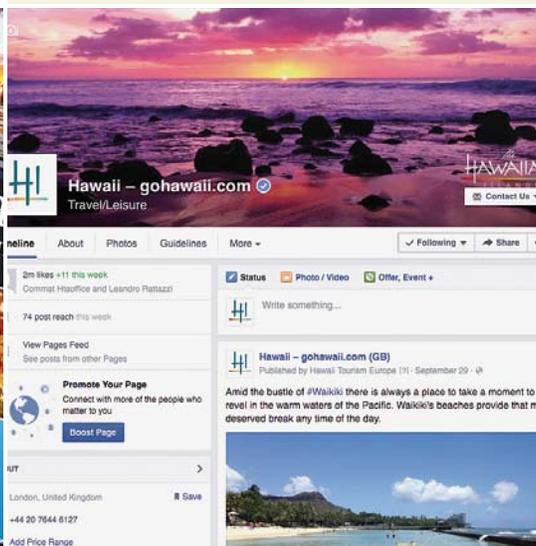
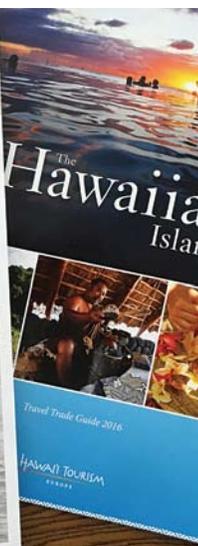
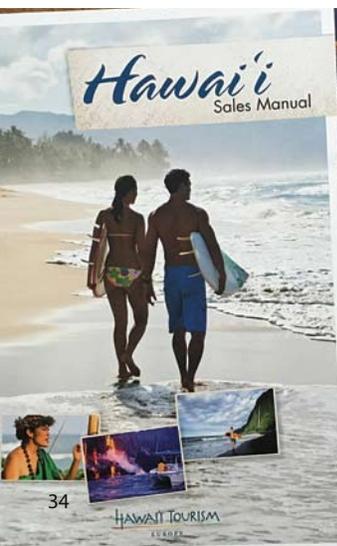
"We are looking forward to the future and growing our strong partnership with the HTA to help expose Hawai'i to the U.K. market."

- Charlie Adams,
USA West Regions,
Destination Manager

Visitor Statistics

Europe	2014 Total	2015 Target	% Change*	2015 YTD**	% Change*
Arrivals	143,057	153,130	7.0%	121,790	-0.9%
Expend (\$ mil.)	\$342.2	\$344.2	0.6%	\$283.68	-1.8%
PPPD Spending	\$181.9	\$172.2	-5.3%	\$179.36	-1.4%

*Year-over-year growth **YTD through October 2015



Latin America

The major market area of Latin America, which includes Brazil, Argentina and Mexico, continues to be a developing market for Hawai'i. In 2014, the Hawaiian Islands welcomed more than 30,000 visitors and spending increased 27.6 percent over the previous year. Hawai'i Tourism Latin America (HTLA) currently has offices in Brazil and Argentina and is working closely with the travel trade and media to build brand awareness of Hawai'i and implement activities to reach consumers.

2015 Highlights:

- Developed promotional opportunities with American Airlines to incentivize bookings with tour operators.
- Launched a marketing campaign with wholesalers that included radio advertising, street ads, social media, brochures, mailing and newsletters.
- Partnered with the popular Havaianas footwear company and a national radio station in Argentina to promote Hawai'i.

2016 Key Activities:

- Implement direct consumer branding programs via co-op campaigns with key tour operators and travel trade familiarization trips.
- Increase production of the Hawai'i travel planner to provide additional sales materials for travel agencies and tour operators in the three markets.
- Increase social media efforts in the Latin America market.



"Hawai'i fulfills the desire of Brazilian travelers with the aloha spirit of the people. It is a destination to be discovered as a life changing experience, as visitors will see Hawai'i beyond the beaches and surf."

- Leo Melro,
Hawai'i Tourism Latin America,
Brazil Office Director

Visitor Statistics

Latin America	2014 Total	2015 Target	% Change*	2015 YTD**	% Change*
Arrivals	30,095	35,000	16.3%	22,828	-6.9%
Expend (\$ mil.)	\$94.6	\$89.1	-5.8%	\$60.39	-17.0%
PPPD Spending	\$270.1	\$212.20	-21.4%	\$234.45	-13.2%

*Year-over-year growth **YTD through October 2015

LA HORA DE VIAJAR

VOS PODÉS SER EL PRIMER GANADOR

Ganate un viaje a Hawai'i, para vos y un acompañante. Además llevate un kit de productos exclusivo de Havaianas

OFICINA DE TURISMO DE HAWAII LATINOAMERICA

HAWAII TOURISM
LATIN AMERICA



RESPIRO BAJO EL AGUA

de viaje

MAUI, HAWAII

UN MAR DE NUBES

HAWAII

LUGARES

Nueva Orleans
LA MEJOR COCINA EN LA CUNA DEL JAZZ

Seattle
EL SECRETO DEL OESTE AMERICANO

Nueva

Miami & Hawaii

Business Destination Management

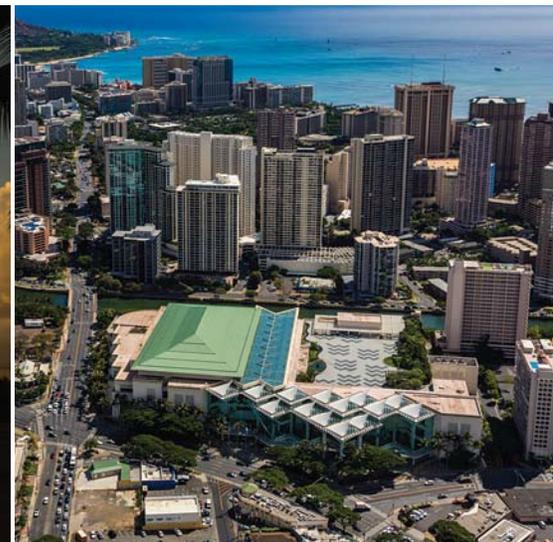
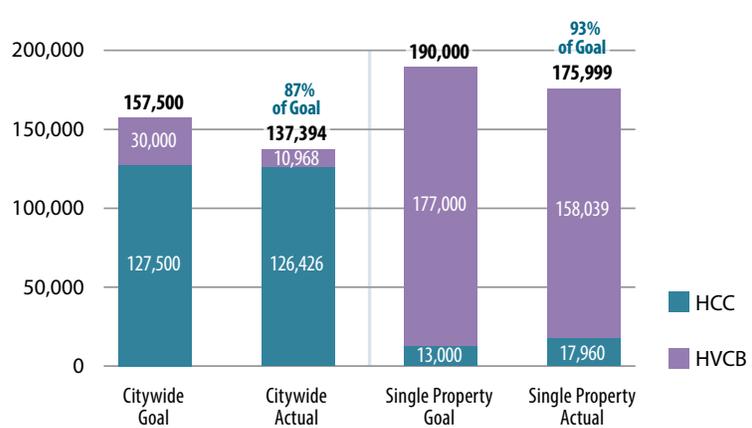
Meet Hawai'i

Meet Hawai'i is a collaborative effort between the sales teams of all the HTA's major markets and the Hawai'i Convention Center. Meet Hawai'i strives to demonstrate Hawai'i as a premier business destination. Positioned in the epicenter of the Asia-Pacific region, Meet Hawai'i shortens the distance between Hawai'i's neighbors in the East and West.

Hawai'i Convention Center

Located at the entrance of Waikiki, the Hawai'i Convention Center is an award winning facility that has 47 meeting rooms. The Hawai'i Convention Center is managed by AEG Facilities, one of the world's leading venue management organizations.

2014 Meet Hawai'i Room Production



Event Name	Start	End	Delegate	Tax Revenue Statewide
Honolulu Festival 2015	3/6/15	3/8/15	5,500	2,519,074
Honolulu 2015	3/19/15	3/21/15	600	274,808
International Group 2015	4/14/15	4/14/15	1,000	458,013
Corporate Group 2015	4/26/15	4/30/15	1,000	458,013
Shinnyo-en Hawaii 2015	5/24/15	5/24/15	2,000	916,027
Honolulu Ekiden & Music Festival 2015	5/30/15	5/30/15	1,000	458,013
Corporate Group 2015	6/2/15	6/5/15	1,000	458,013
21st Annual Meeting of the Organization for Human Brain Mapping	6/13/15	6/19/15	2,500	1,145,033
LCI 2015 Annual Convention	6/26/15	6/30/15	18,000	8,244,241
International Group 2015	7/4/15	7/8/15	1,500	687,020
2015 IAU General Assembly	8/2/15	8/14/15	4,000	3,211,068
2015 IAU Student Block - in conjunction with IAU General Assembly	8/2/15	8/14/15	200	91,603
International Group 2015	8/8/15	8/11/15	4,500	2,061,060
Asia Pacific Clean Energy Summit & Expo 2015	8/23/15	8/26/15	1,200	549,616
World Molecular Imaging Congress	9/7/15	9/12/15	2,500	1,145,033
Corporate Group 2015	9/24/15	10/1/15	3,200	1,465,643
International Group 2015	10/10/15	10/11/15	2,380	1,090,072
GEC/ICRP-9 Conference	10/11/15	10/16/15	350	160,305
ACG 2015 Annual Scientific Meeting & Postgraduate Course	10/15/15	10/22/15	3,800	1,740,451
AANEM 2015 Annual Meeting	10/25/15	11/1/15	1,200	549,616
IFEBP 2015 Convention	11/7/15	11/11/15	12,500	5,725,167
Anime Matsuri Hawaii 2015	11/27/15	11/29/15	5,000	2,290,067
International Group 2015	12/1/15	12/5/15	2,200	1,007,629
2015 International Chemical Congress of Pacific Basin Societies	12/15/15	12/21/15	11,620	5,322,116
Total Definite Bookings for 2015:		23	88,750	42,027,702
2016 BMT Tandem Meetings	2/15/16	2/23/16	4,500	2,061,060
Honolulu 2016	3/3/16	3/5/16	600	274,808
International Church of the Foursquare Gospel Annual General Convention	5/28/16	6/2/16	5,000	2,290,067
2016 Aloha Volleyball Tournament	6/16/16	6/16/16	1,700	778,623
International Coral Reef Symposium 2016	6/18/16	6/25/16	2,000	916,027
2016 IUCN World Conservation Congress	9/1/16	9/12/16	8,000	3,664,107
2016 CPCU Society Annual Meeting & Seminars	9/17/16	9/20/16	4,700	2,152,663
PRiME 2016	10/9/16	10/14/16	3,000	1,374,040
Total Definite Bookings for 2016:		8	29,500	13,511,395



Brand Development

Brand development projects aim to provide support tools for Hawai'i's visitor industry to better promote and understand the destination. The majority of the projects and/or programs have a connection to the travel trade and visitor industry, and provide support and/or resources for the global marketing partners.

2015 Highlights:

- The HTA attended the U.S. Travel Association's 2015 IPW in Orlando with HTE, HTLA, HTO, HTK and the island visitor bureaus conducting meetings with 144 tour operators from around the world.
- The successful Mahalo Month for Travel Professionals program took place again this year with over 100 offers from Hawai'i's visitor industry, and attracting those that promote the Hawaiian Islands to experience the destination first hand.
- Meetings with key industry stakeholders in March and May to engage greater dialogue and participation between the HTA's global marketing partners and industry partners.

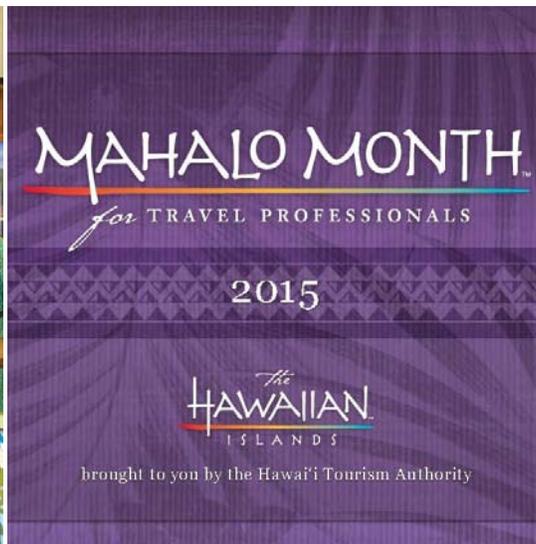
2016 Key Activities:

- Implement a new program for post-arrival marketing in the beginning of 2016.
- Launch of edu-tourism informational sheet that will help to develop and support content based on education programs for international destinations and grow this niche market for Hawai'i.



"Tourism is a wonderful thing for a museum. Every day we have new people at our door who are excited about and entranced with the history and culture, while expanding their knowledge, and building their respect for Hawai'i, its history, people and culture."

- Theo Morrison,
Lahaina Restoration
Foundation,
Executive Director



Tourism Conference

Held annually at the Hawai'i Convention Center, the HTA's 2015 Hawai'i Tourism Conference took place on Aug. 27 and 28. The Conference is the premier educational and networking event for Hawai'i's visitor industry and stakeholders. Attendees heard from local, national and international experts on a range of issues facing Hawai'i's visitor industry.

2015 Highlights:

- A record 1,100 people attended the conference to learn about a variety of topics including airlift, accommodations and more.
- The 2015 Tourism Legacy Awards honored the unique traditions of paniolo, Hawaiian cowboys.
- Welcomed more than 200 students from high schools and colleges statewide to participate.
- Held the first-ever Airline Summit with network and route planners from national and international markets.

2016 Key Activities:

- Develop the Hawai'i Tourism Conference into a city-wide event with increased attendance from neighbor island, national and international attendees.
- Create additional events surrounding the Hawai'i Tourism Conference.
- Enhance the conference program to include more engaging sessions, including tracks and workshops.



"The future of tourism and travel is in technology and creating personalized experiences for travelers. Today's travelers are looking for authentic, personalized experiences. They want to feel part of the local culture, landscape and neighborhood. If you can incorporate a sense of authenticity into your tourism experience, travelers will take notice."

- Alejandro Moxey,
Expedia,
Director Market
Management, Hawai'i



Online/Website Projects

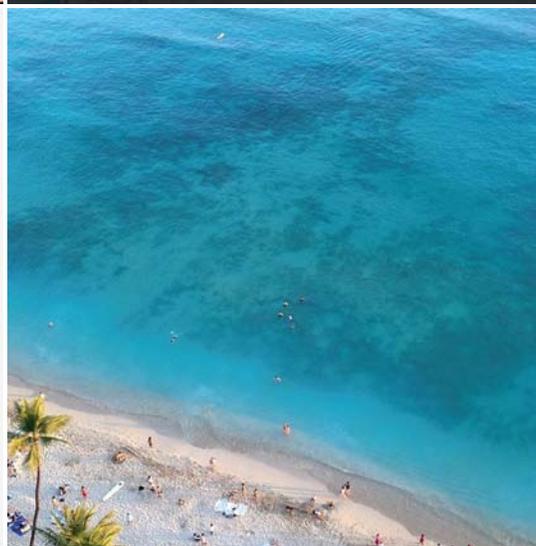
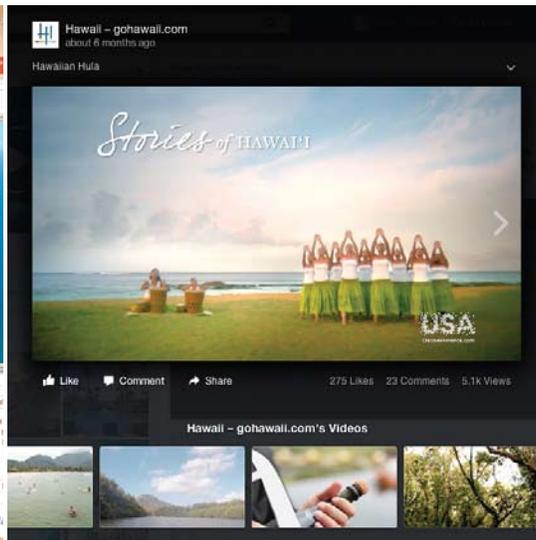
The HTA works with its marketing contractors to manage and maintain all of the websites used to promote the Hawaiian Islands, including the *GoHawaii.com* leisure and travel trade websites, *MeetHawaii.com* and the *HawaiiTourismAuthority.org* websites. To ensure a unified message and marketing strategy, the HTA also works with its global partners on marketing and social media services.

2015 Highlights:

- Increased the use of social media for the HTA’s marketing contractors.
- Successfully executed the Stories of Hawai’i online campaign in Japan, China, Korea, Taiwan and Oceania.

2016 Key Activities:

- Refresh and improve the HTA website, as well as the *GoHawaii.com* websites.
- Explore the use of other technologies and social media outlets.



Communications

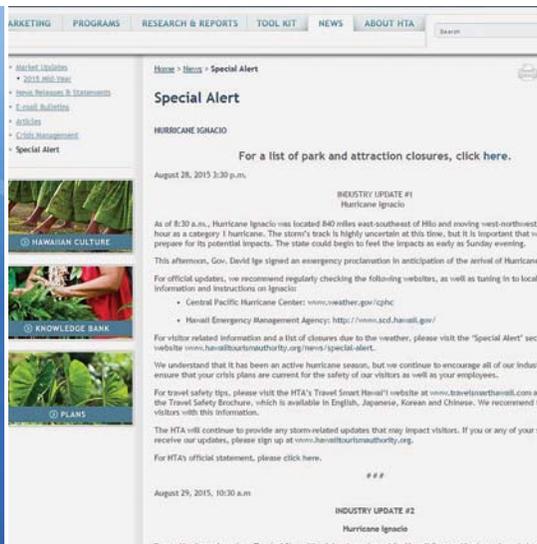
The HTA's communications program aims to increase awareness and understanding of Hawai'i's tourism economy and the role of the HTA as the state's lead tourism agency. This includes global marketing, community and visitor industry engagement, media relations, crisis communications, issues mitigation, legislative oversight and distribution of relevant information affecting Hawai'i's visitor industry.

2015 Highlights

- Increased communications and outreach for the 2015 Hawai'i Tourism Conference to reach a record 1,100 attendees.
- Provided timely and pertinent industry updates for six natural disasters, including five hurricane and tropical storms and one tsunami warning.
- Produced the second series of HTA Quarterly Industry Update Videos, which include in-market video updates from each of the HTA's global marketing contractors.
- Facilitated 377 international media requests through the HTA's international news bureau.

2016 Key Activities:

- Increase communication with all stakeholders.
- Look for opportunities for the HTA's new leadership to engage with the visitor industry and community.
- Ensure transparency of all of the HTA's programs.



Tourism Research

Tourism Research makes information on Hawai'i's visitor industry available to educate and empower stakeholders and facilitate data driven decision making. Tourism research responsibilities include reporting on visitor characteristics, expenditures, strategic plan, program evaluation, in-market studies and competitive destination research projects.

2015 Highlights:

- Consistently published the Monthly Visitor Statistics Report (12), Airline Seat Outlook Report (12), 2014 Annual Visitor Research Report and 2014 Visitor Plant Inventory.
- Issued a detailed report on the Individually Advertised Units in Hawai'i Study (Vacation Rentals) based on 2013 and 2014 data periods.
- Issued the findings of the 2014 Resident Sentiment Study.
- Completed the Hawai'i Tourism Authority Strategic Plan.

2016 Key Activities:

- Complete a holistic impact study on 12 major festivals or events resulting in a full range of impacts comparable to the 2014 Pro Bowl study.
- The most common research tables will be automatically generated through an online data warehouse.
- Implement a business opinion study to keep a pulse on the visitor industry's sentiment and tourism issues in Hawai'i.
- Complete work with the HTA's brand managers to develop measurements and key performance indicators for all brand marketing and brand experience programs.

"The HTA's statistics help us to identify high-performing target markets on the West Coast and internationally. We are able to create print and digital Hawai'i editorial sections in each market, with the support of Hawai'i's hotels, to encourage travel to Hawai'i."

*- Debbie Joseph Anderson,
Destination Marketing
Hawaii, President*

HTA Research Publications

Available online at hawaiiitourismauthority.org/research

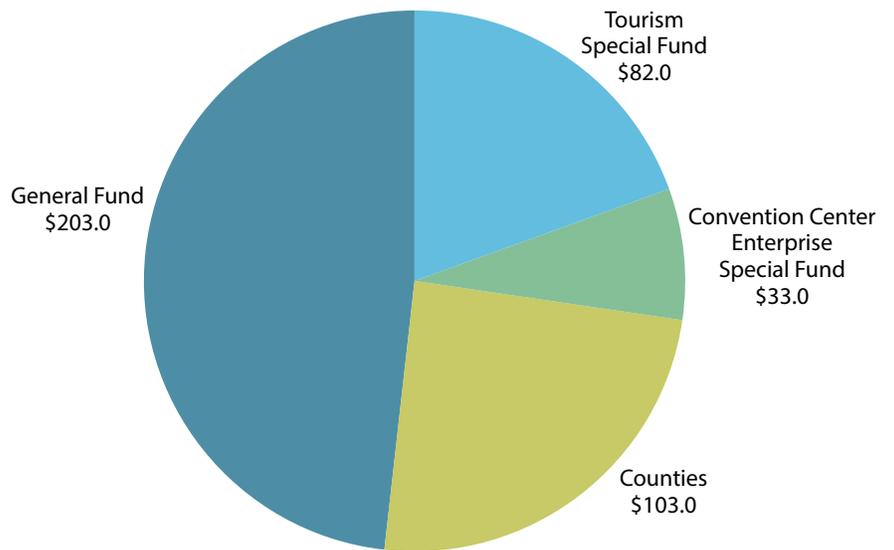
Publication	Frequency/Distribution
Daily Passenger Counts	Daily
Monthly Visitor Statistics Highlights and News Release	Monthly, fourth week of the month
Island Highlights, Arrivals by U.S. Regions, Visitor Expenditures (by Category)	Monthly, fourth week of the month
Visitor Arrivals by Country	Monthly, fourth week of the month
MMA Highlights and Fact Sheets	Monthly, fourth week of the month
Airline Seat Capacity Outlook (three-month forecast of non-stop scheduled flights to Hawai'i)	Monthly, end of the month
Online Media Sentiment Report	Monthly (Discontinued as of May 2015)
Annual Visitor Research Report	Annually, July
Visitor Satisfaction and Activities	Quarterly (brief monitoring report) & Annual (full report), third quarter
Marketing Effectiveness Report	Bi-Annually
Visitor Plant Inventory	Annually, December

Transient Accommodations Tax (TAT) Collections

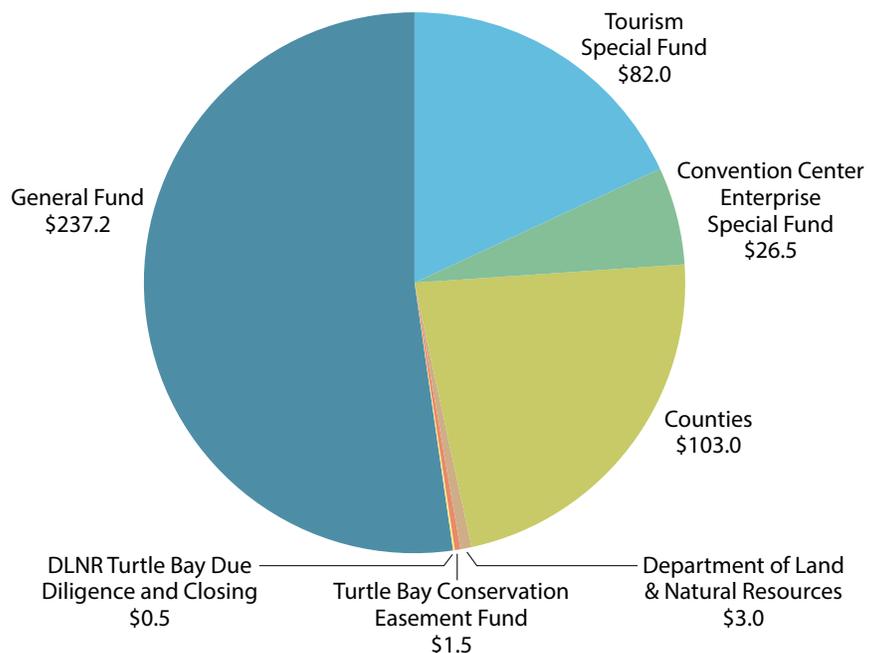
TAT collected benefits the State as a whole, and ultimately benefits the individual counties and Hawai'i's residents. Importantly, this revenue finds its way into the local community on each island to support schools, police, infrastructure and parks, and contributes to an improved quality of life for Hawai'i residents. In FY 2015, the State collected a total of \$420.9 million in TAT, which was a 6.5 percent increase from FY 2014 when the total collection was \$395.2 million. In FY 2015, the State's General Fund collected \$202.9M in TAT.

The annual allocation of TAT to the Tourism Special Fund and Convention Center Enterprise Special Fund is \$82 million and \$33 million, respectively. Beginning July 1, 2015, the allocation of TAT to the Convention Center Enterprise Special Fund is \$26.5 million. Additionally, \$103 million of TAT is allocated to the counties and \$3.5 million is allocated to the State Department of Land and Natural Resources (DLNR), including \$500K for due diligence and closing costs related to the Turtle Bay conservation easement purchase, and \$1.5 million is allocated to the Turtle Bay Conservation Easement Special Fund.

TAT Distribution FY 2015 (\$ mil.)



TAT Distribution FY 2016 (\$ mil.)



O'ahu

For most of 2015, arrivals and spending to the island of O'ahu remained steady. With the highest population, most availability of hotels and air seats, O'ahu remains the top island to visit based on spending and arrivals.

The HTA continued its partnership with the City and County of Honolulu and the Hawai'i Community Foundation to support 27 County Product Enrichment Programs, 13 Natural Resources Community-Based Programs, 15 Kūkulu Ola: Living Hawaiian Culture Programs and 11 Signature Events.

Visitor Statistics

O'ahu	2014 YTD*	2015 YTD*	% Change
Expend (\$ mil.)	\$6,072.2	\$5,972.4	-1.6%
Arrivals	4,321,418	4,427,960	2.5%
PPPD Spending	\$208.3	\$198.1	-4.9%

Source: Hawai'i Tourism Authority *YTD actuals through October.

Air Seats

Honolulu	2014 YTD*	2015 YTD*	% Change
Domestic	3,726,200	3,893,683	4.5%
International	2,852,094	2,872,967	0.7%
Total Seats	6,578,294	6,766,650	2.9%

Source: Diiio schedules *YTD actuals through October.

Transient Accommodations Tax (TAT) to City & County of Honolulu

O'ahu	FY 2014	FY 2015
TAT (\$ mil.)	\$41.0	\$45.4

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

HTA Programs and Funding

HTA Programs	2014		2015	
	No. of Programs	Amount	No. of Programs	Amount
County Product Enrichment*	26	\$325,000	27	\$325,000
Kūkulu Ola: Hawaiian Culture Community	9	\$268,000	14	\$460,525
Major Festivals	4	\$666,000	4	\$701,000
Native Hawaiian Festivals	4	\$330,000	4	\$450,000
Natural Resources Community-Based	8	\$291,612	13	\$385,266
Safety & Security	1	\$272,000	1	\$272,000
Sporting Events	10	\$5,335,000	7	\$1,435,000
Career Development**	0	–	0	–
O'ahu Visitors Bureau***		\$3,245,269		\$3,279,269
Total HTA Program Funding		\$10,732,881		\$7,308,060

* The County Product Enrichment Program (CPEP) FY 13 and FY 2014 budget is \$400,000 each year of which no more than \$75,000 can be used for administrative purposes.

** In 2015, the HTA funded 2 statewide Career Development programs at \$100,000 (\$50,000 DOE CTE and \$50,000 LEI).

***HTA provides funding for the Hawai'i Visitors and Convention Bureau and each of the island chapter bureaus for their respective work in promoting the State and the individual islands to the global marketplace.



Maui County

Growth on Maui in spending and arrivals remained strong through most of 2015. While Moloka'i arrivals were stable, spending steadily increased. And with the renovations of two major properties on Lāna'i, spending on the island declined, though arrivals were steady. Overall, tourism in Maui County remained strong through 2015.

In 2015, the HTA supported various events in Maui County in partnership with the County of Maui and the Hawai'i Community Foundation, including 23 County Product Enrichment Programs, 10 Natural Resources Community-Based Programs, 6 Kūkulu Ola: Living Hawaiian Culture Programs and 4 Signature Events.



Visitor Statistics

Maui County	2014 YTD*	2015 YTD*	% Change
Expend (\$ mil.)	\$3,417.4	\$3,595.5	5.2%
Arrivals	2,026,349	2,134,121	5.3%
PPPD Spending	\$205.3	\$206.7	0.7%

Source: Hawai'i Tourism Authority *YTD actuals through October.

Air Seats

Kahului	2014 YTD*	2015 YTD*	% Change
Domestic	1,477,455	1,720,096	16.4%
International	136,961	156,390	14.2%
Total Seats	1,614,416	1,876,486	16.2%

Source: Diiio schedules *YTD actuals through October.

Transient Accommodations Tax (TAT) to Maui County

Maui County	FY 2014	FY 2015
TAT (\$ mil.)	\$21.2	\$23.4

Note: Maui County receives 22.8% of the TAT revenues distributed to the counties.

HTA Programs and Funding

HTA Programs	2014		2015	
	No. of Programs	Amount	No. of Programs	Amount
County Product Enrichment*	23	\$345,000	23	\$322,000
Kūkulu Ola: Hawaiian Culture Community	0	–	6	\$155,543
Major Festivals	1	\$105,000	1	\$105,000
Native Hawaiian Festivals	2	\$60,000	2	\$60,000
Natural Resources Community-Based	4	\$90,700	11	\$368,873
Safety & Security	1	\$46,000	1	\$46,000
Sporting Events	3	\$565,000	3	\$565,000
Career Development**	0	–	0	–
Maui Visitors & Convention Bureau***		\$2,882,071		\$2,877,071
Moloka'i Visitors Association***		\$244,741		\$244,741
Destination Lāna'i***		\$143,000		\$143,000
Total HTA Program Funding		\$4,481,512		\$4,887,228

*The County Product Enrichment Program (CPEP) FY 2014 and FY 2015 budget is \$400,000 each year of which no more than \$75,000 can be used for administrative purposes. In FY 2014, there were rollover funds from FY 2013.

**In 2015, the HTA funded 2 statewide Career Development programs at \$100,000 (\$50,000 DOE CTE and \$50,000 LEI).

***HTA provides funding for the Hawai'i Visitors and Convention Bureau and each of the island chapter bureaus for their respective work in promoting the State and the individual islands to the global marketplace.

Kaua'i

Despite being the smallest of the four larger Hawaiian Islands, spending on Kaua'i increased significantly through most of 2015. With its remote feel and slower pace, Kaua'i continued to draw visitors to experience its unique peaceful setting.

The HTA supported 24 County Product Enrichment Programs, 3 Natural Resources Community-Based Programs, 4 Kūkulu Ola: Living Hawaiian Culture Programs and 1 Signature Event in partnership with the County of Kaua'i and the Hawai'i Community Foundation.

Visitor Statistics

Kaua'i	2014 YTD*	2015 YTD*	% Change
Expend (\$ mil.)	\$1,163.4	\$1,338.2	15.0%
Arrivals	934,073	979,574	4.9%
PPPD Spending	\$162.2	\$180.4	11.2%

Source: Hawai'i Tourism Authority *YTD actuals through October.

Air Seats

Līhu'e	2014 YTD*	2015 YTD*	% Change
Domestic	519,747	539,849	3.9%
International	24,708	25,698	4.0%
Total Seats	544,455	565,547	3.9%

Source: Diiio schedules *YTD actuals through October.

Transient Accommodations Tax (TAT) to Kaua'i County

Kaua'i	FY 2014	FY 2015
TAT (\$ mil.)	\$13.5	\$14.9

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

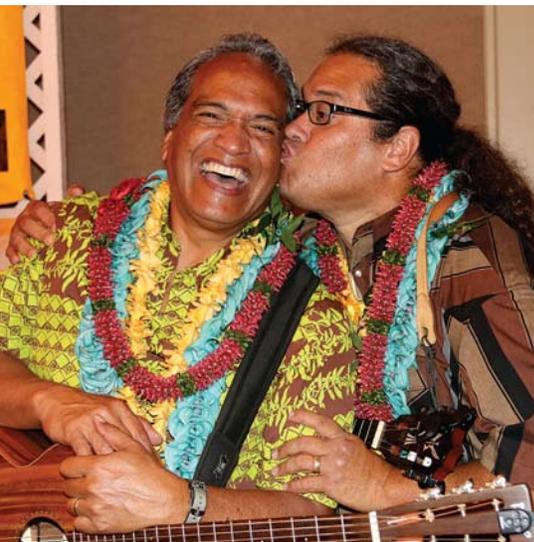
HTA Programs and Funding

HTA Programs	2014		2015	
	No. of Programs	Amount	No. of Programs	Amount
County Product Enrichment*	24	\$350,000	24	\$335,500
Kūkulu Ola: Hawaiian Culture Community	2	\$79,000	4	\$141,322
Major Festivals	1	\$63,500	1	\$63,500
Native Hawaiian Festivals	1	\$20,000	2	\$30,000
Natural Resources Community-Based	5	\$169,372	3	\$80,000
Safety & Security	1	\$53,000	1	\$53,000
Sporting Events	1	\$25,000	1	\$30,000
Career Development**	0	–	0	–
Kaua'i Visitors Bureau***		\$2,285,893		\$2,280,893
Total HTA Program Funding		\$3,045,765		\$2,922,393

*The County Product Enrichment Program (CPEP) FY 2014 and FY 2015 budget is \$400,000 each year of which no more than \$75,000 can be used for administrative purposes.

**In 2015, the HTA funded 2 statewide Career Development programs at \$100,000 (\$50,000 DOE CTE and \$50,000 LEI).

***HTA provides funding for the Hawai'i Visitors and Convention Bureau and each of the island chapter bureaus for their respective work in promoting the State and the individual islands to the global marketplace.



Hawai'i Island

The largest of all of the Hawaiian Islands and home to the active Kilauea Volcano, Hawai'i Island continued to be a popular destination with arrivals increasing steadily in 2015. Supported by the growth in arrivals, spending also remained steady.

To provide visitors with authentic experiences, the HTA partnered with Hawai'i County and the Hawai'i Community Foundation to support 15 County Product Enrichment Programs, 5 Natural Resources Community-Based Programs, 8 Kūkulu Ola: Living Hawaiian Culture Programs and 5 Signature Events in 2015.



Visitor Statistics

Hawai'i Island	2014 YTD*	2015 YTD*	% Change
Expend (\$ mil.)	\$1,540.1	\$1,554.0	0.9%
Arrivals	1,202,126	1,253,142	4.2%
PPPD Spending	\$172.0	\$166.5	-3.2%

Source: Hawai'i Tourism Authority *YTD actuals through October.

Air Seats

Kona	2014 YTD*	2015 YTD*	% Change
Domestic	539,221	643,454	19.3%
International	28,469	29,205	2.6%
Total Seats	567,690	672,659	18.5%

Hilo	2014 YTD*	2015 YTD*	% Change
Domestic	38,664	36,814	-4.8%
International	0	0	NA
Total Seats	38,664	36,814	-4.8%

Source: Diiio schedules *YTD actuals through October.

Transient Accommodations Tax (TAT) to County of Hawai'i

Hawai'i Island	FY 2014	FY 2015
TAT (\$ mil.)	\$17.3	\$19.2

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

HTA Programs and Funding

HTA Programs	2014		2015	
	No. of Programs	Amount	No. of Programs	Amount
County Product Enrichment*	18	\$345,000	15	\$322,000
Kūkulu Ola: Hawaiian Culture Community	1	\$25,000	9	\$214,200
Major Festivals	1	\$75,000	1	\$63,500
Native Hawaiian Festivals	4	\$125,000	4	\$107,500
Natural Resources Community-Based	5	\$185,258	5	\$166,000
Safety & Security	1	\$120,500	1	\$120,500
Sporting Events	2	\$380,000	3	\$480,000
Career Development**	0	–	0	–
Big Island Visitors Bureau***		\$2,236,356		\$2,231,356
Total HTA Program Funding		\$3,492,114		\$3,705,056

*The County Product Enrichment Program (CPEP) FY 2015 and FY 2014 budgets are \$400,000 each year of which no more than \$75,000 can be used for administrative purposes. In FY 2014, there was a rollover from 2013.

**In 2015, the HTA funded 2 statewide Career Development programs at \$100,000 (\$50,000 DOE CTE and \$50,000 LEI).

***HTA provides funding for the Hawai'i Visitors and Convention Bureau and each of the island chapter bureaus for their respective work in promoting the State and the individual islands to the global marketplace.

2015 Living Hawaiian Culture Program (LHCP): Kūkulu Ola

O’AHU

- 40th Annual Queen Lili’uokalani Keiki Hula Competition
- E Mau Hawai’i Iloa
- Family Ingredients Mālama-themed TV programming
- Hawaiian Master Musician Outreach Program in Waimānalo
- Hawai’i Theatre Center’s 2015 Hāna Hou! Season
- Ho’olaupa’i Aloha
- Ka ‘Ike Nohona – Understanding Cultural Practices
- Kauhale o Waimea A Cultural Learning Experience in an Historic Ahupua’a
- Kuamo’o Battlefield and Burial Grounds Kūkuluhou
- Kumu Kahua Theatre 44th Season E Komo Mai!
- Mau Waiwai Makamae: Strengthening our Museums, Protecting our Treasures
- MaMo: Maoli Arts Month, a celebration of Native Hawaiian art & cultural practices
- Mele Murals
- Mele Wai Pana

MAUI

- Ho’omau I Ka Hale Kahiko: Training A New Generation of Master Hale Builders
- Kapahu Living Farm
- Master of Hawaiian Music One-hour Film Episode and Educational Website
- Moonlight Mele
- Promoting Visitor and Community Connection to Traditional Hawaiian Crops
- Moloka’i Mo’olelo Project

KAUA’I

- Hawaiian Treasures Heritage Center
- Ka Māla Project
- Nāmāhoe Kaua’i Project: Voyaging from the Past into the Future
- Project KU’U KULAIWI

HAWAI’I ISLAND

- Hānau Ke Ali’i Kamehameha Iole Tour
- Ka Pilina Poina ‘Ole “Connections Not Forgotten”
- Kūkulu Ola Hawaiian Film Series
- Konea ‘O Kukui Gardens
- Nā Hulu Kūpuna Concert – Echoes of our Island Home
- Preserving and Restoring Indigenous Hawaiian Culture through Education and Land Stewardship
- The Malolo Project

NATIVE HAWAIIAN FESTIVALS PROGRAM

- Prince Kūhiō Celebration
- Merrie Monarch Festival
- King Kamehameha Celebration (Statewide)
- Prince Lot Hula Festival
- Aloha Festivals (Statewide) (Kaua’i – Aloha Kauai Festival) (Maui – Festivals of Aloha, Maui Nui Style) (Big Island – Festivals: 30 days of Aloha)

Natural Resources

O’AHU

- Accelerating Site Restoration at Community-based Stewardship Areas through Mobile Workdays
- Achieving Certified Sustainable Tourism & Supporting the IUCN World Conservation Congress in Hawai’i
- Ahihi-Kīna’u Natural Area Reserve Information, Education, and Volunteer Program
- Engaging Residents and Visitors in Stewardship of the Pūpūkea MLCD
- “Getting to Know the Ko’olaus” Community Conservation Project
- He’eia Stream Riparian Restoration
- Honolulu Re-useable Bottling Project
- Increasing Responsible Use of Hawai’i’s Marine Resources through the Makai Watch Program
- Invasive Species Control on O’ahu
- Mālama Na Honu Volunteer Support Project #2
- O’ahu Ahupua’a Boundary Marker Project
- Wai Momona
- Whale and Dolphin Stranding Response

MAUI

- Advancing Reef Sustainability in the West Maui Accommodations Sector
- East Maui Watershed Partnership – H.R. Pu’u Pahu Reserve, Protection & View-corridor Enhancement
- Ho’okuleana: Ho’okipa’s Honu
- Mālama Ke Kai
- Protecting Maui’s Wahi Pana: Volunteer-based Restoration of Ethno Botanically Important Auwahi Forest
- Seed Storage of and Increased Community Access to Rare Native Hawaiian Coastal Plants
- The Nose Knows: Detector Dogs for Little Fire Ants
- GPS Web-Enabled App Project for Storied Places of Lāna’i
- Promoting Education and Protection of Lāna’i’s Natural Resources at the Lāna’i Animal Rescue Center
- Habitat Improvements for Laysan Albatross at the Mokio Preserve, Moloka’i, Hawai’i

KAUA’I

- Improvements to Visitor Amenities at Makauwahi Cave Reserve
- Kōkua Kōke’e 2015
- Volun-Tourism to Preserve Kaua’i’s Native Ecosystems

HAWAI’I ISLAND

- Controlling little fire ants at County of Hawai’i park sites frequented by visitors
- Ho’ola Hou! Working Together to Reforest Waikoloa
- Koai’a Corridor Enhancement Project
- Preventing the Extinction of Gouania Vitifolia in the Wai’anae Mountains, O’ahu
- The Alahula ‘Āina Moon (Pathways to Abundance) Initiative

STATEWIDE

- Improving the Visitor Experience in the Native Forest at Waikamoi, Maui

OTHER HAWAIIAN CULTURE PROJECTS

- Hökūle’a World Wide Voyage
- Center for Hawaiian Music and Dance
- Kāhea Program – Statewide Airport Greetings Program
- Native Hawaiian Hospitality Association

Natural Resources Advisory Group

- Mark Fox, *The Nature Conservancy of Hawai’i*
- Annette Ka’ohelau’i, *Hawai’i Ecotourism Association*
- Vincent Shigekuni, *PBR Hawai’i*
- T. ‘Aulani Wilhelm, *Papahānaumokuākea Marine National Monument*

Hawaiian Cultural Program Advisory Council

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

County Product Enrichment Program

O'AHU

Reebok Spartan Race Hawai'i Trifecta Weekend 2015
Kānaka Ikaika Racing Association 2015 Ocean Paddle Series
65th Narcissus Festival
2015 Hawai'i Night in Chinatown Festival and Parade
Sharing the Plantation Experience
Chinese New Year Festival 2015
Hapa Haole Hula Festival & Competition
30th Annual Duke Kahanamoku Beach Challenge
34th Annual Hawaiian Scottish Festival & Highland Games
Lei Day Celebration
13th Annual Waikiki Spam Jam
Hawai'i Book and Music Festival
We Are Samoa Festival (WAS)
23rd Annual Filipino Fiesta and Parade
26th Annual Honolulu Rainbow Film Festival
14th Annual Korean Festival
2015 Hawai'i State Farm Fair
Asia Pacific Dance Festival
45th Annual 'Ukulele Festival
2015 Hawai'i Dragon Boat Festival Competition
Moloka'i 2 O'ahu Paddleboard World Championships
33rd Annual Hawaiian Slack Key Guitar Festival
Duke's OceanFest 2015
Hawai'i Chocolate Festival
15th Annual Windward Ho'olaule'a
2nd Annual Hawai'i Coffee Festival
Multicultural Matsuri – New Year's 'Ohana Festival and Kodomo No Hi: Keiki Fun Fest

MAUI

Fire & Art at the Hui No'eau
Visual Arts Exhibitions 2015
Maui Pops Orchestra
Lahaina Plantation Days
Wailuku First Friday
Hawaiian Music Series
Royal Lahaina Challenger
Maui Open Studios
World Whale Day
Three Chinese Festivals
7th Maui Hawaiian Steel Guitar Festival
Maui Classical Music Festival
15th Annual Maui Matsuri
23rd Annual Celebration of the Arts
24th Annual Hawaiian Slack Key Guitar Festival
MAMo on Maui: Wearable Art Show
Jazz Maui

M4Molokai
Kū Mai Ka Hula 2015
45th Annual Maui Marathon
Pailolo Challenge - Maui to Moloka'i Canoe Race
Maui 'Ukulele Festival
Ho'ola iā Kaho'olawe Series (Volunteer Days and Moonlight Evenings)

KAUAI

Project Kia'i Kai II: Traditional Ecological Knowledge Walking Tour
Kauai Food Tours
E Kanikapila Kākou 2015-Music into the Community
11th Annual Inspiration Kauai Wellness Expo
2015 Waimea Town Celebration: Heritage of Aloha
Prince Kūhiō Celebration Kauai
2015 Kauai Orchid and Art Festival
Kauai Art Tour: Artists Open Studios
2015 Hawaiian Cultural Events (Nā Lei Hiwa Hiwa) and Kauai Mokihana Festival
Irmalee & Walter Pomroy May Day Lei Contest & Happy's Keiki Lā Lei Contest
May Day by the Bay
2015 King Kamehameha Day Celebration
Concert in the Sky
Soto Zen Bon Festival
16th Annual Kōloa Plantation Days Rodeo
Heiva I Kauai 2015
Matsuri Kauai 2015
2015 Kauai Pow Wow
The Coconut Festival presented by the Kapa'a Business Association
The 27th Annual Eō e Emalani i Alaka'i Festival
2015 Kauai Chocolate & Coffee Festival
New Years Eve Music Festival & Fireworks Celebration
Festival of Lights
23rd Annual Hawaiian Slack Key Guitar Festival "Kauai Style"

HAWAII ISLAND

Greenwell Garden Hawaiian Plant Walk
Hawai'i Yoga Festival
Hawai'i Volcanoes Institute: Inspirational Experiences in the Great Outdoors
Second Half of 34th Presenting Season and First Half of 35th Presenting Season
Live from Mauna Kea
The Hula Arts at Kilauea in Hawai'i Volcanoes National Park
Experience Aloha- First Friday
Pana'ewa Stampede Rodeo
Ka'ū Coffee Festival
Puna Music Festival
Big Island Film Festival at The Fairmont Orchid, Hawai'i
KMF Big Island Style!
Queen Lili'uokalani Long Distance Races
HawaiiCon
2015 Historic Kailua Village Special Events and Festivities Series

HTA Product Development

Na Hōkū Music Festival
May Day

HTA Signature Events

Kona Coffee Cultural Festival
Kōloa Plantation Days
Maui Film Festival at Wailea
Pan-Pacific Festival
Honolulu Festival
Hawai'i Food and Wine Festival
Hawai'i International Film Festival
Diamond Head Classic
Hyundai Tournament of Champions
Ironman World Championship
Lotte Championship
Mitsubishi Electric Championship at Hualālai
Hawai'i Sand Volleyball Festival 2015
Hawai'i Bowl
Sony Open in Hawai'i
Xterra World Championship
Xterra Trail Run World Championship
Maui Jim Maui Invitational
Kauai Marathon
HCRA State Championships (HCRA - Hawaiian Canoe Racing Association)
Lava Lava Festival - 'Ohana Cup 2015

Greetings

Kāhea Program – Hawaiian Music and Hula at the airports

HTA News Releases

- 15-01 HTA Announces Search for a New President and CEO
- 15-02 HTA Selects 2015 Product Enrichment Program (PEP) Events and Organizations
- 15-03 December Visitor Stats: A Record 8.3 Million Visitors Came to Hawai'i in 2014 Total Visitor Expenditures Grew to \$14.7 Billion
- 15-04 Hawai'i Tourism Japan Launches World Mac Hawai'i Campaign
- 15-05 January Visitor Statistics: Total Visitor Expenditures for January 2015 Decreased 2.5 Percent to 1.4 Billion
- 15-06 February Visitor Statistics: Total Visitor Arrivals Rose 2.3 percent Compared to February 2014
- 15-07 March Visitor Statistics: Total Visitor Arrivals Rose 7 Percent Compared to March 2014
- 15-08 The HTA Welcomes Two New Board Members
- 15-09 HTA Board of Directors Announces Selection of George Szigeti as New President and CEO
- 15-10 April Visitor Statistics: Total Visitor Arrivals Increased 2.3 Percent Compared to April 2014
- 15-11 HTA's New President and CEO Gorge Szigeti Officially Starts
- 15-12 HTA Announces Management Changes
- 15-13 May Visitor Statistics: Total Visitor Arrivals Grew 9.3 Percent Compared to May 2014
- 15-14 HTA Releases 2015 Mid-Year Market Update Videos
- 15-15 HTA's 2015 Hawai'i Tourism Conference to Be Held on Aug. 27 – 28
- 15-16 HTA Board of Directors Appoints Board Chair
- 15-17 June visitor statistics: Visitor Arrivals and Spending Increased for the First Half of 2015
- 15-18 HTA Issues RFPs for Destination Marketing Management and Representation Services
- 15-19 HTA Issues RFP for Cruise Development Consultation Services
- 15-20 HTA Announces Search for a New Vice President, Marketing and Product Development
- 15-21 HTA to Release RFPs for Product Enrichment & Signature Events Programs
- 15-22 July Visitor Statistics: Another Strong Month of Visitor Arrivals and Spending Growth
- 15-23 HTA Honors Tradition of Hawai'i's Paniolo at the 2015 Tourism Legacy Awards
- 15-24 HTA Releases RFP to Organize, Facilitate and Promote Mele Mei
- 15-25 Maritime Vessel Scheduling System Goes Live
- 15-26 August Visitor Statistics: Visitor Arrivals Reached a New Record for the Month of August
- 15-27 The U.S. Women's National Soccer Team Plays in Hawai'i
- 15-28 September Visitor Statistics: Visitor Arrivals Reached a Record High for September
- 15-29 HTA Announces Selection of Cruise Consultant

HTA Media Statements

- Jan. 29, 2015 December Visitor Statistics Statement: Hawai'i's Tourism Economy Reaches Third Consecutive Landmark Year
- Jan. 29, 2015 December Visitor Statistics Statements by County
- Feb. 25, 2015 January Visitor Statistics Statement: Hawai'i Tourism Economy Starts to Stabilize in 2015
- Feb. 25, 2015 January Visitor Statistics Statements by County
- Mar. 25, 2015 February Visitor Statistics Statement: Strong Airlift Helps to Maintain Visitor Arrivals to the State
- Mar. 25, 2015 February Visitor Statistics Statements by County
- Apr. 7, 2015 Regarding Virgin America's Inaugural Flight Announcement
- May 8, 2015 March Visitor Statistics Statement: Visitor Arrivals Up Three Percent during First Quarter
- May 8, 2015 March Visitor Statistics Statements by County
- May 28, 2015 April Visitor Statistics Statement: Spending in Spring Sustain Year-to-Date Visitor Expenditures
- May 28, 2015 April Visitor Statistics Statements by County
- May 29, 2015 Regarding Preclearance from Japan
- June 25, 2015 May Visitor Statistics Statement: Hawai'i's Tourism Economy Counties to Grow at Steady Pace
- June 25, 2015 May Visitor Statistics Statements by County
- July 8, 2015 Regarding United Airlines Flights
- July 30, 2015 June Visitor Statistics Statement: Visitor Spending on Pace for a Fourth Consecutive Record-Breaking Year
- July 30, 2015 June Visitor Statistics Statements by County
- Aug. 24, 2015 Wastewater Discharge
- Aug. 26, 2015 July Visitor Statistics Statement: Visitor Spending Reaches \$9 Billion Through July 2015
- Aug. 26, 2015 July Visitor Statistics Statements by County
- Sept. 28, 2015 August Visitor Statistics Statement: Tourism in Hawai'i Remains Solid Through August
- Sept. 28, 2015 August Visitor Statistics Statements by County
- Oct. 28, 2015 September Visitor Statistics Statement: Visitor Arrivals Continue to Reach Record Highs
- Oct. 28, 2015 September Visitor Statistics Statements by County

Contracts Over \$1 Million Over the Life of the Contract

Aviareps Marketing Garden Ltd., Korea Major Market Area Management
 BrandStory, China Major Market Area Management
 Hawaiian Airlines, Inc. Tourism Access and Stimulus Fund (Airline Development)
 I Plus Connect Communications dba iConnect, Korea Major Market Management

PGA Tour Inc., PGA Tour
 SMS Research and Marketing Services, Inc., Calculation of Visitor Characteristics and Expenditures
 The Walshe Group, Oceania Major Market Area Management
 World Triathlon Corporation, Ironman World Championship (2015-2019)

Contracts Over \$100,000 for Calendar Year 2015

Access Cruise, Inc., Cruise Development Consultation Services
 Ailevon Pacific Aviation Consulting dba Ailevon, Development of Air Service Strategy Plan
 Alaska Airlines, Inc., Tourism Access and Stimulus Fund (Airline Development Program)
 Aloha Week Hawai'i, Inc. dba Aloha Festivals, Aloha Festivals of Hawai'i 2015 and 2016
 Anthology Marketing Group dba Anthology Public Relations, PR, Communications and Outreach
 Aviareps Marketing Garden Ltd., Korea Major Market Area Management
 Aviareps SDN BHD, Southeast Asia Destination Representation Services
 BrandStory, China Major Market Area Management
 City and County of Honolulu, County Product Enrichment Program
 County of Hawai'i, County Product Enrichment Program
 County of Kaua'i, County Product Enrichment Program
 County of Maui, County Product Enrichment Program
 D.K. Shifflet & Associates, LTD, Marketing Effectiveness Study
 Grand Pacific Events, LLC, Rugby Events
 Hawaiian Airlines, Inc., Tourism Access and Stimulus Fund (Airline Development)
 Hawaiian Airlines, Inc., Tourism Access and Stimulus (Korean Drama promotion)
 Hawai'i Maoli, Prince Kūhiō Festival 2015 and 2016
 Hills Balfour Limited, Europe Major Market Area Management

HONBLUE, Inc. dba Electric Pencil, Printing, Storage and Delivery of In-Flight Forms 2015-18.
 I Plus Connect Communications dba iConnect, Korea Major Market Area Management
 JWI Marketing, Taiwan Destination Representation Services
 The Kalaimoku Group, May Day Celebrations
 Kukui Media Group, LLC, Merrie Monarch Broadcast
 Maui Economic Development Board, Maui Film Festival
 McNeil Wilson Communications, Inc. dba Qmark Research, Satisfaction and Activity Data
 PGA Tour Inc., PGA Tour
 Polynesian Voyaging Society, Hōkūle'a Worldwide Tour
 Repucom America LLC, Evaluation and Performance measures of HTA's Festival and Events
 SMS Research and Marketing Services, Inc., Calculation of Visitor Characteristics and Expenditures
 USTA Hawai'i Pacific Section, USTA Fed Cup
 VASH Hawai'i Island, Visitor Assistance Program for Hawai'i Island
 Virgin America, Inc., Route Development Program
 Visitor Aloha Society of Hawai'i, Visitor Assistance Programs for O'ahu
 The Walshe Group, Oceania Major Market Area Management
 World Triathlon Corporation, Ironman World Championship (2015-2019)
 Young & Rubicam, Inc. dba Lotte Championship, 2015 LPGA Lotte Championship

Hawai'i Tourism Authority

Fiscal Year 2015 Actuals (\$000)

REVENUES

TAT Deposits – Tourism Special Fund	\$ 82,000
Investment Pool Interest/Miscellaneous Receipts	340

TOTAL REVENUES **\$82,480**

APPROPRIATIONS

FY 2015	\$ 87,152
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TOTAL APPROPRIATIONS **\$87,152**

HTA EXPENDITURES*

Maintaining Brand	\$ 1,840
Brand Experience	9,146
Brand Management	59,549
Communications, Community/Government Relations and Outreach	629
Tourism Research and Publications	1,881
Strategic Oversight and Governance	3,970

TOTAL HTA EXPENDITURES **\$77,015**

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

Hawai'i Convention Center

Fiscal Year 2015 Actuals (\$000)

REVENUES

TAT Deposits - Convention Center Enterprise Special Fund	\$ 33,000
Convention Center Operations	6,521
Subsidy from Tourism Special Fund for Convention Center Sales and Marketing	3,900
Investment Pool Interest/Miscellaneous Receipts	73

TOTAL REVENUES **\$43,494**

APPROPRIATIONS

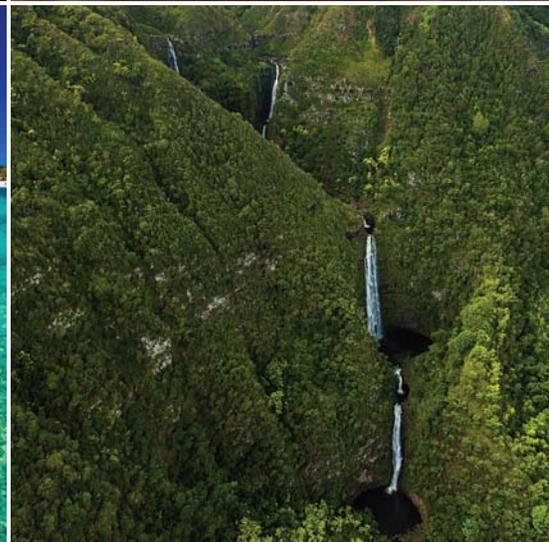
FY 2015	\$ 54,010
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TOTAL APPROPRIATIONS **\$54,010**

EXPENDITURES

Convention Center Operations	\$ 9,870
Convention Center Sales and Marketing	3,898
Convention Center Repair and Maintenance	4,300
Strategic Oversight and Governance (Includes Convention Center Insurance)	644
Other	171
Total Expenditures Prior to Payments on Obligation to State Department of Budget & Finance	\$ 18,883
Payments on Obligation to State Department of Budget & Finance	\$ 26,426

TOTAL EXPENDITURES **\$45,309**





HAWAII TOURISM AUTHORITY

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Honolulu, Hawaii 96815
kelepona tel (808) 973-2255
kahua pa'a web hawaii tourism authority.org

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