MISSION STATEMENT

To strategically manage Hawai‘i tourism in a sustainable manner consistent with economic goals, cultural values, preservation of natural resources, community desires and visitor industry needs.
We are charged with representing Hawai'i and helping to drive long term development of communities through a travel and tourism strategy.

1. Improve the integrity of the destination
2. Ensure Stable Economic Benefits
3. Elevate Hawai‘i’s Value Perception
4. Strengthen HTA’s Reputation
HTA STRATEGIC GOALS

MISSION

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

Improve the Integrity of the Destination
- Increase community support for tourism
- Be a good steward of the destination

Ensure Stable Economic Benefits
- Focus marketing on producing consistent arrivals
- Increase visitor expenditures by attracting high-spending visitors and encouraging spending opportunities

Elevate Hawai‘i’s Value Perception
- Maintain and improve air access to the Hawaiian Islands
- Protect Hawai‘i’s brand to remain competitive
- Meet traveler expectations for accommodations and infrastructure

Strengthen HTA’s Reputation
- Continually improve the organization’s ability to lead the industry
- Ensure transparency and accountability for HTA’s tourism marketing efforts
BRAND MANAGEMENT PLAN
GLOBAL MARKETING TEAMS

- Canada
- China
- Europe
- Hong Kong
- Japan
- Korea
- Oceania
- Southeast Asia
- Taiwan
- United States
BENEFITS TO HAWAI‘I’S TOURISM ECONOMY

Tourism is the largest single source of private capital for Hawai‘i’s economy.

Year to date through June 2018, Hawai‘i’s economy has recorded:

- Visitor Spending: $9.26 billion
- State Tax Revenue: $1.08 billion
- Visitor Arrivals: 4,982,843
- Air Seats: 6,622,844
Successfully growing tourism benefits Hawai‘i by:

- Increasing visitor spending
- Generating higher State tax revenue
- Creating more jobs for residents

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2014 (+3.1%)</th>
<th>2015 (+0.9%)</th>
<th>2016 (+5.3%)</th>
<th>2017 (+6.2%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spending</td>
<td>$14.52B</td>
<td>$14.97B</td>
<td>$15.11B</td>
<td>$15.91B</td>
<td>$16.78B</td>
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<tr>
<td>Tax Revenue</td>
<td>$1.54B</td>
<td>$1.58B (+2.6%)</td>
<td>$1.71B (+7.0%)</td>
<td>$1.86B (+8.8%)</td>
<td>$1.96B (+6.2%)</td>
</tr>
<tr>
<td>Jobs</td>
<td>168K</td>
<td>174K (+3.6%)</td>
<td>177K (+1.7%)</td>
<td>194K (+9.6%)</td>
<td>204K (+5.3%)</td>
</tr>
<tr>
<td>Arrivals</td>
<td>8.17M</td>
<td>8.32M (+1.8%)</td>
<td>8.68M (+4.3%)</td>
<td>8.93 (+2.9%)</td>
<td>9.38 (+5.0%)</td>
</tr>
<tr>
<td>Air Seats</td>
<td>10.9 M</td>
<td>11.3M (+3.7%)</td>
<td>11.9M (+5.7%)</td>
<td>12.0M (+0.7%)</td>
<td>12.2M (+1.8%)</td>
</tr>
</tbody>
</table>

Year-to-date through June 2018:

- Visitor Spending: $9.26 billion (+10.8%)
- State Tax Revenue: $1.08 billion (+$105.2M)
- Visitor Arrivals: 4,982,843 (+8.2%)
- Air Seats: 6,622,844 (+10.3%)
EST. $545.9M FUNDED BY THE VISITOR ROOM TAX TAT PROJECTED DISTRIBUTION - FY2018 ($M)

- State General Fund $329.9M
- Tourism Special Fund $82.0M
- Counties $103.0M
- Convention Center Enterprise Fund $26.5M
- Special Funds
  - Turtle Bay Conservation Easement Fund $1.5M
  - DLNR 3.0M

July, 2018
HTA Funding and TAT Collections (FY2002–FY2017)

TAT Collections have Increased Annually Since FY2010. Tourism Special Fund has Remained Constant at $82 Million Since FY2014.
DIRECT VISITOR SPENDING ($MILLIONS) & AVERAGE DAILY CENSUS

- Kaua‘i:
  - $5.0 M per day
  - 26,275 visitors per day

- O‘ahu:
  - $20.9 M per day
  - 104,962 visitors per day

- Maui County:
  - $13.4 M per day
  - 61,793 visitors per day

- Hawai‘i:
  - $6.6 M per day
  - 35,495 visitors per day
ARRIVALS TO HAWAIʻI BY MARKET IN 2017

US West, 3,843,208
US East, 1,998,650
Japan, 1,568,609
Canada, 518,051
Oceania, 392,560
Europe, 139,780
Korea, 258,398
China, 151,295
Taiwan, 18,767
Latin America, 24,999
All Others, 334,019
NATURAL RESOURCES

To respect, enhance and perpetuate Hawai'i's natural resources to ensure a high level of satisfaction for residents and visitors.
HTA SUPPORT OF 2018 ENRICHMENT PROGRAMS

$1,240,000
33 Awardees

$1,153,300
65 Awardees

$1,150,000
26 Awardees

Kūkulu Ola Program – Perpetuating Hawai‘i an culture

Aloha ‘Āina Program – Protecting natural resources

Community Enrichment Program – Highlighting community events

$3.5M for 124 Community Programs Statewide
ALOHA ‘ĀINA PROGRAM

• Provides funding through requests for proposals (RFP) to community based non profits that manage, preserve and protect our natural resources.

• Awarded 26 projects $1.15 million in FY18

• Examples of projects funded:
  • Mālama Nā Honu
  • Hawai‘i Marine Mammal Alliance (Hawai‘i Marine Animal Response)
  • ‘Ahahui Mālama i Ka Lōkahi
  • Coral Reef Alliance
  • The Marine Mammal Center
An interdepartmental collaboration to support natural resource conservation in the following areas for FY2018:

**Communications:**
- TV Documentary air time $3,000
- In-room messaging on responsible visiting in approximately 24,000 hotel rooms statewide as well as In-Flight messaging in partnership with Hawaiian Airlines $40,000
- Funded an FTE for a social media specialist to work with DLNR in combating illegal activities via social media and to create a social media campaign on responsible visiting. $60,984

**DOFAW:**
- Rapid ‘Ōhi’a Death Outreach and Aerial Survey $372,496
- Carbon Sequestration Certification $40,000

**DSP/Na Alahele:**
- Inspection and audit of state parks

**Total Funding:** $541,390
The Ala Wai Watershed Collaboration (AWWC) is a broad network of stakeholders that formed to address storm water flood mitigation, ecosystem restoration, and overall community resilience.

Provided $250,000 in FY17 for the group to study, create and begin work in managing the watershed.
HAWAI‘I ECOTOURISM CERTIFIED

- Awarded $50,000 to support ongoing certification efforts state wide and expand their training capacity.

- 47 certified operators statewide

- Estimated 2.3 Million visitors go on tour annually with a certified operator

- 1,500 FTE & 825 PT employees are employed and trained by certified operators
DOLPHIN SMART CERTIFIED

- Hawaiʻi Nautical
- Port Waikīkī Cruises
- Holoholo Charters
- Ocean Joy Cruises
- Pacific Whale Foundation
- Trilogy Excursions
OTHER PROGRAMS

• Ho‘okaulike Program

• Responsible Tourism (Pre-Arrival)

• Partnership with Chamber of Commerce of Hawai‘i –HOST

• Other destination management programs for safety & security, etc.
Save the Date!

October 1 - 3, 2018

• Keynote Speakers
• Global Tourism Trends
• Sustainable Tourism
• Cultural Tourism
• Global Student Debate
• PATA Student Forum
• Legacy Lunch
• Student Pricing
MAHALO PIHA!