



2024 HTA Spring Tourism Update

3.06.2024

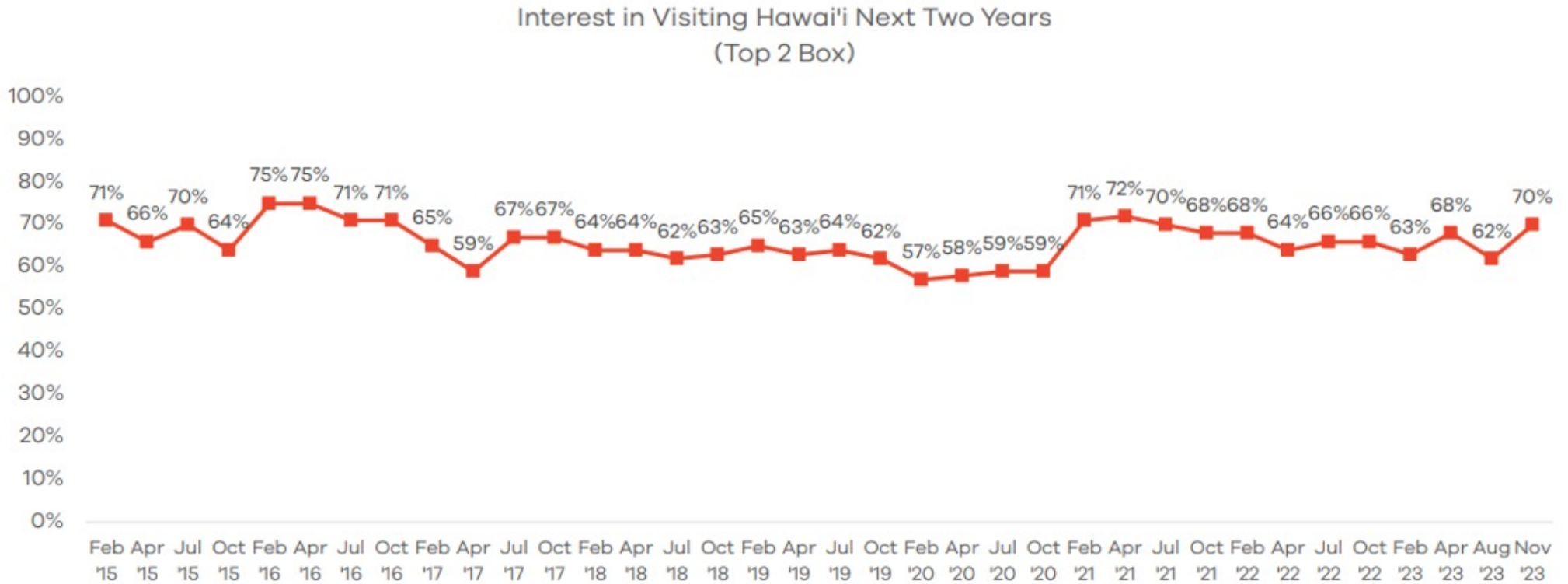
Jay Talwar
Chief Marketing Officer

MARKET INSIGHTS

2023 U.S. MARKET RECAP

Visitor Expenditures	\$15.94 Billion
Visitor Arrivals	7.43 million
Per Person Per Day Spending	\$240.6
Average Length of Stay	8.92 Days
First Time Visitors	26.5%
Repeat Visitors	73.5%

2023 U.S. MARKET RECAP



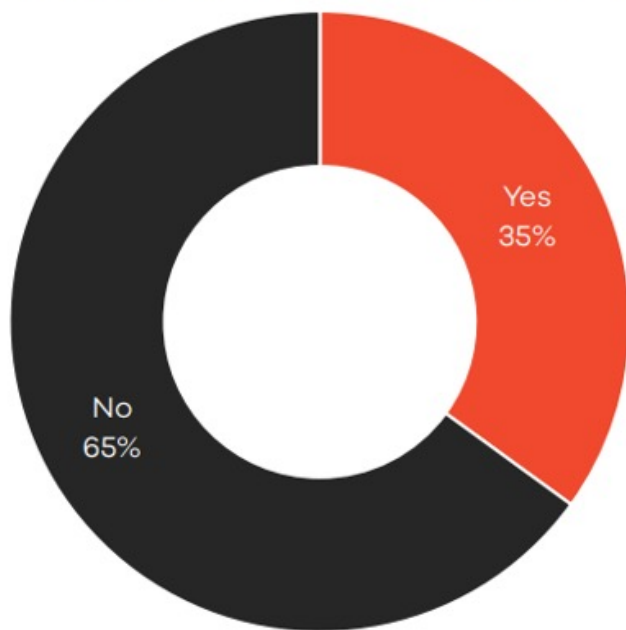
Hawai'i Tourism Proprietary Questions

Base: Air Travelers (n=1,710)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"



2023 U.S. MARKET RECAP

Considered Visiting Hawai'i But Changed Their Mind



Reasons For Not Visiting Hawai'i – Among Those Who Changed Their Mind	2022	2023
Price of airfare	34%	35%
Price of the hotel	28%	35%
Price of a vacation package	33%	32%
The flight to Hawai'i is too long	20%	22%
Better value at another destination	22%	22%
Concerns about COVID-19 variants	19%	14%
Heard/read that Hawai'i residents don't want visitors	9%	13%
Hurricanes and tropical storms hitting Hawai'i	11%	12%
Not sure which island(s) in Hawai'i to visit	12%	12%
Already been and want to try another destination	10%	11%
Accommodations were not available	10%	11%
Hawai'i is too crowded	9%	10%
Hawai'i is not exotic enough	9%	10%
Not enough time to travel to Hawai'i	13%	9%
Higher quality entertainment at other destinations	NA	9%
Heard rental cars limited/not available	NA	8%
Not enough activities in Hawai'i	8%	9%
Hawai'i is not unique enough	10%	9%
Not enough dining options at price point	NA	7%

Hawai'i Tourism Proprietary Questions

Base: Air Travelers (n=1,710) & Travelers Who Changed Their Mind (n=606)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Winter Edition"

Data in bold indicates a significant difference from Winter 2022.



2024 HOTEL BOOKING PACE

Hawai'i (All Islands) Total Room Nights On The Books
February 2024 - January 2025 YOY as of February 18, 2024

Month	State of Hawai'i	O'ahu	Maui	West Maui	Kaua'i	Island of Hawai'i
February 2024	+4.4%	+4.9%	+0.5%	+0.2%	+12.5%	+2.9%
March 2024	-0.8%	-0.7%	-3.2%	-11.1%	+0.9%	+1.7%
April 2024	-6.3%	-2.9%	-19.2%	-25.6%	-4.6%	-4.8%
May 2024	+0.5%	+5.7%	-20.9%	-31.5%	+16.9%	-0.1%
June 2024	-6.8%	-3.2%	-26.5%	-42.3%	+15.6%	-2.4%
July 2024	-2.5%	+2.9%	-26.0%	-39.3%	+25.0%	-1.9%
August 2024	-0.3%	+7.5%	-27.5%	-40.7%	+24.6%	-9.2%
September 2024	-11.0%	-6.8%	-29.5%	-46.9%		-11.0%
October 2024	-9.7%	-0.7%	-32.1%	-27.2%	-6.1%	-1.8%
November 2024	-13.6%	+0.9%	-40.2%	-47.2%	+8.1%	-4.7%
December 2024	-13.4%	+7.1%	-34.3%	-45.0%	-13.4%	-13.9%
January 2025	+9.6%	+23.2%	-18.8%	-41.7%	+34.7%	+44.2%

MARKET INSIGHTS



Economic Output

U.S. GDP growth is estimated at 2.4% in 2023. The U.S. economy is set to slow significantly in 2024 and forecast GDP growth will ease to just 1.2% due to restrictive monetary and fiscal policies. An extended period of below-trend growth into 2025 is anticipated.



Domestic Leisure

- Softening of pent-up demand
- Dwindling of excess savings
- Slowing economy
- Softening labor market and wage growth
- Continued elevated inflation
- Resumption of student loan payments constrain balance sheets



Inflation

Falling gasoline prices, a drop in shelter inflation, and continued declines in core goods prices have kept headline and core inflation on a downward trajectory. While easing supply chain pressures should keep goods prices falling into early 2024, a still tight labor market will keep service inflation sticky. Year-on-year inflation is forecast to drop from 4.1% in 2023 to 2.6% in 2024.

TARGET AUDIENCE



CORE SEGMENT

**The Mindful
Hawai'i Target
Traveler**

SUB-SEGMENTS



The Eco-Conscious



**The Culturally
Curious**



The Service-Minded



**The Unobtrusive
Explorer**

BRAND STRATEGY

2024 BRAND STRATEGY

Utilize research to identify the most effective and efficient media to reach the Mindful Hawai'i Target Traveler for both paid and earned media programs.

Maintain a two-pronged strategy to invite the Mindful Hawai'i Target Traveler to enjoy enriching experiences. After they have committed to their trip, deliver more specific education/kuleana messaging.

Deliver a higher level of invitations to visit Maui

2024 PLAN

2024 PLAN

Messaging	
Earned	
Editorial Opportunities	
Media Visits	
Virtual Media Blitz	
Social	
Organic	
Paid	
Advertising	
Advanced TV	
Digital	
Search - Google	
Enewsletters	
Gohawaii.com	
Travel Trade	
Messaging - Travel	
Trade	
Advertising	
Trade Media	
Consortia Programs	

2024 PLAN PAID MEDIA



2024 COMMUNICATIONS PLAN

RIGHT PERSON, RIGHT MESSAGE, RIGHT TIME

Pre-Destination Decision
(Dreaming and Planning Travelers)

Post-Booking/Pre-Arrival
(Confirmed Travelers)

Mindful Hawai'i Target Travelers



Audience Behaviors:

Thinking about planning a vacation but undecided on destination

Considering Hawai'i

Actively Searching for and Booking Flights to Hawai'i, Accommodations, etc.

Rounding out itinerary with Food, Activities, etc.

Mindsets to Address:

Is Hawai'i right for me? Which island?

Is now the right time? Am I welcome?

What does my vacation/ itinerary/ experience look like?

How do I visit Hawai'i the right way? (responsible behaviors)

Brand Messaging

Statewide Videos

Value Prop Messaging

Snackable Content that builds on the themes we introduced in the Hero Video, adds dimension to the Brand, and helps people add more detail to their vision for their trip

Mindful Travel Tips

Video series featuring booked travelers 3 mindful behaviors per asset; triggered after booking Hawai'i travel but before arriving on-island

2024 PLAN BRAND CAMPAIGN

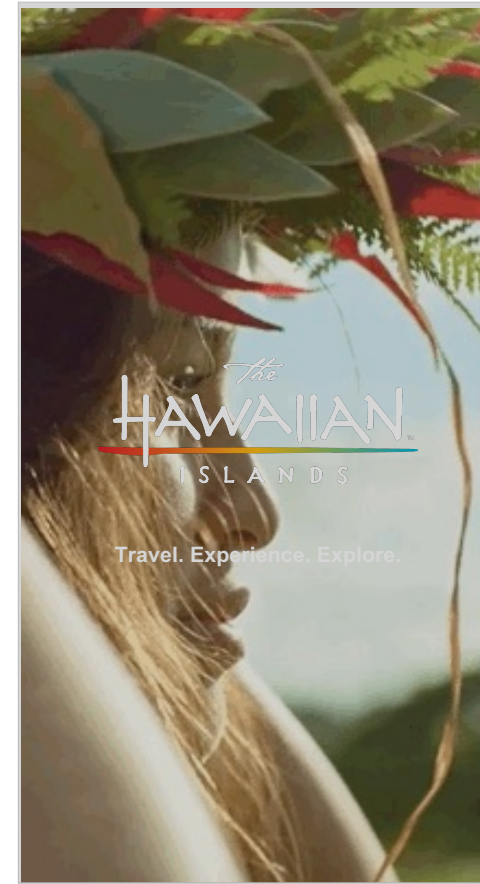
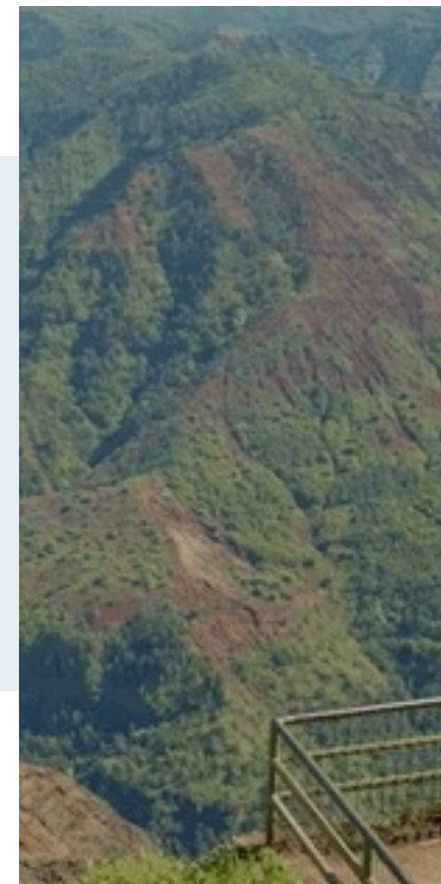
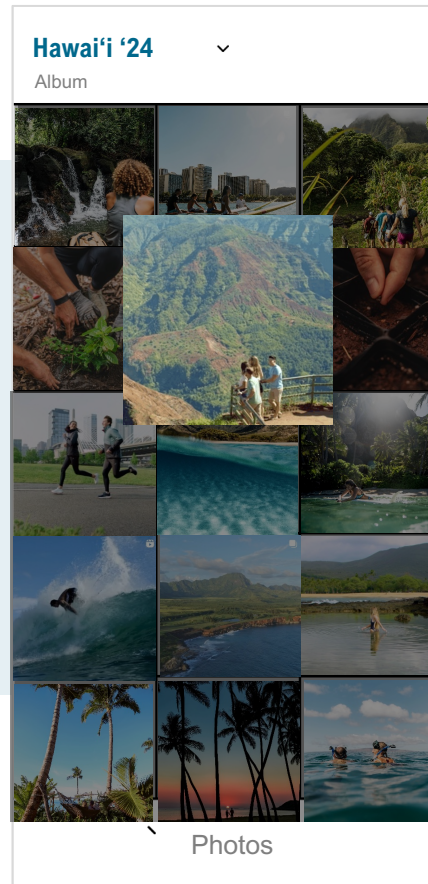


NO FILTER NECESSARY

Inspiring potential travelers by the memories they'll collect in Hawai'i.

We want to show off the real Hawai'i. In this series, we will show glorious landscapes, ambassadors, and cultural experiences that mimic the UI of a digital camera roll*. The post copy will use colloquial language and nod to "no filter necessary" when visiting Hawai'i.

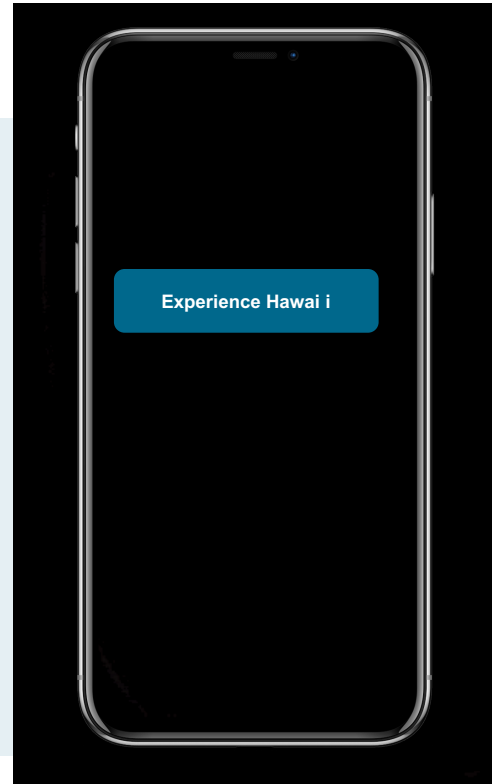
2024 PLAN SOCIAL MEDIA



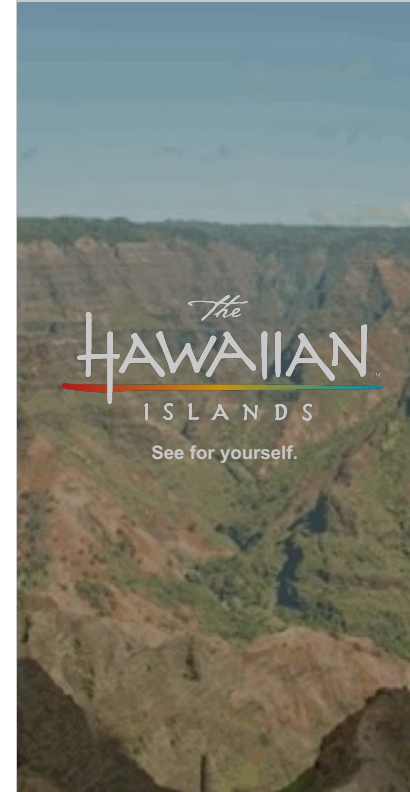
POV: YOU'RE ON YOUR WAY TO HAWAI'I

We want potential visitors to know the choice is clear when it comes to where to go to next.

From hikes, volunteering, and beach days, we leverage new and existing footage that puts our audience in a first-person seat and shows the spectrum of experiences across the Hawaiian Islands. Post & asset copy will inspire a POV series from, booking to landing on-island, that inspires potential travelers into considering Hawai'i in their travel plans.



2024 PLAN SOCIAL MEDIA



FRESH PERSPECTIVES

We travel to experience novelty. New environments stimulate our brains, giving us a fresh perspective on life.

*Where another way of life,
changes your life.*

2024 PLAN SOCIAL MEDIA

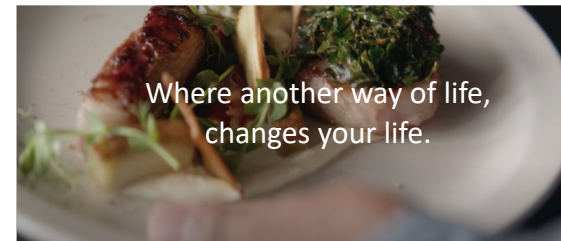
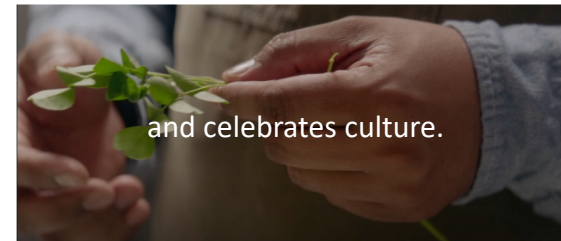
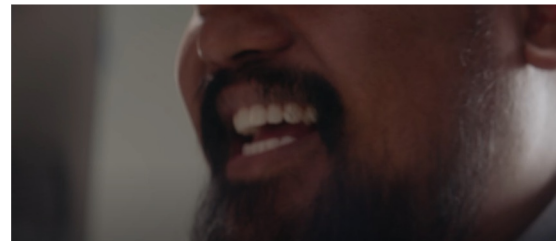
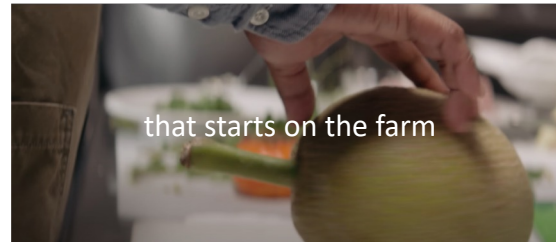


HAWAI'I CUISINE

Let's give travelers a taste of the new wave of local cuisine and how it celebrates local food and culture.

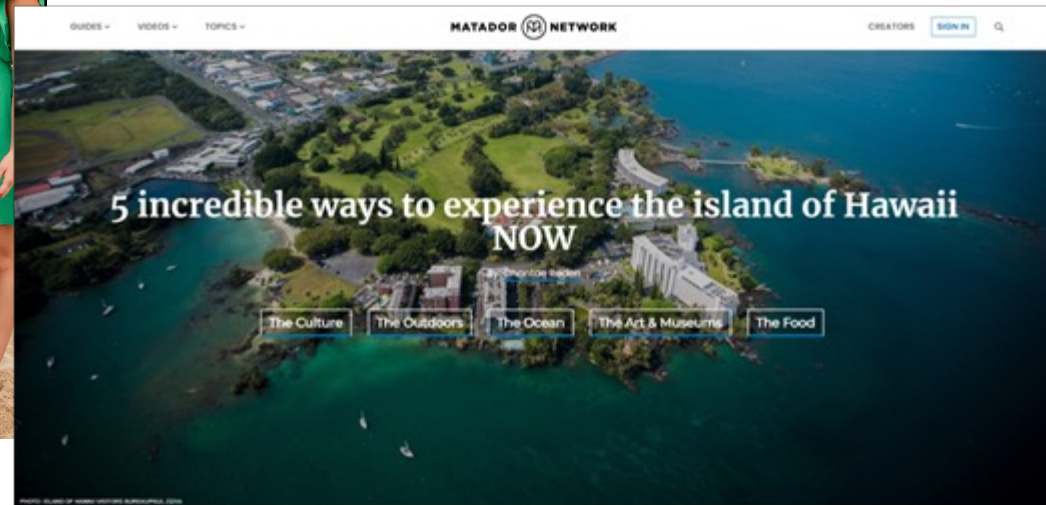


2024 PLAN SOCIAL MEDIA

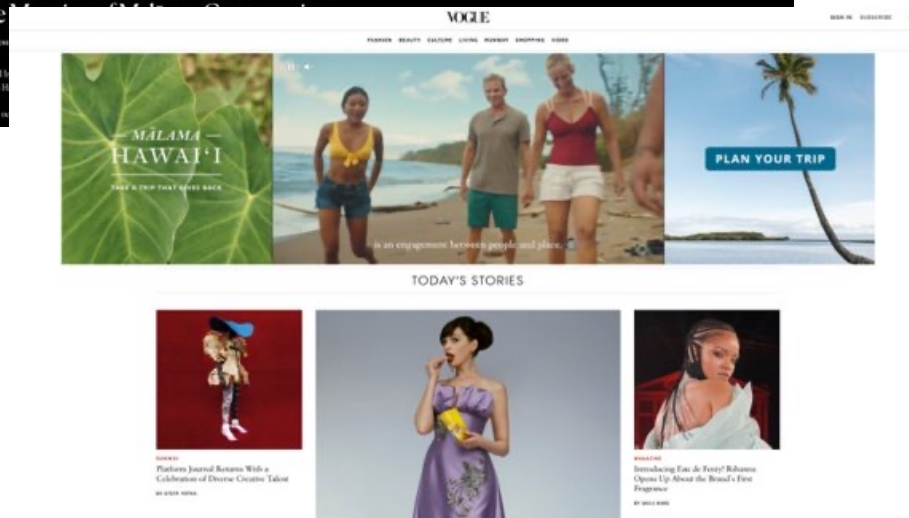
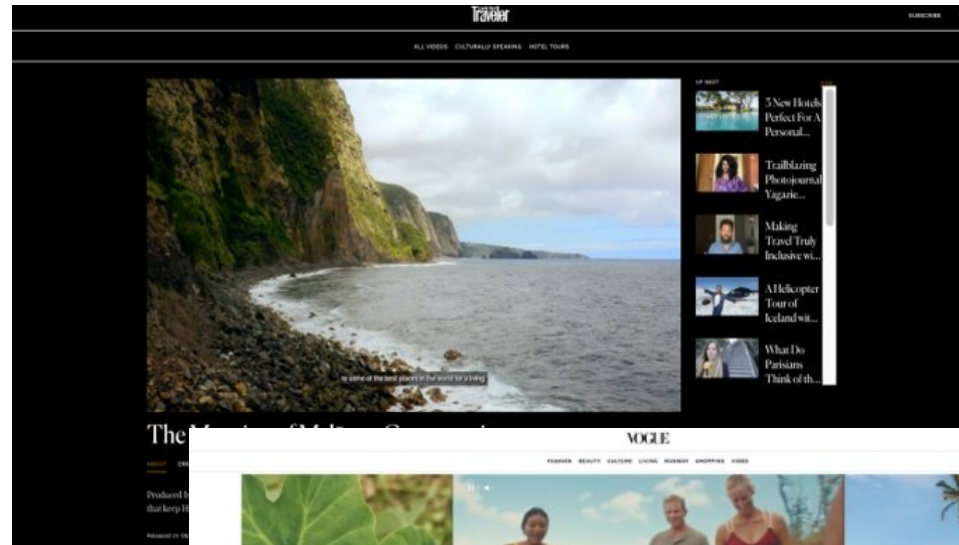




2024 PLAN NATIVE MEDIA



2024 PLAN NATIVE MEDIA



2024 PLAN

PUBLIC RELATIONS

Future Major Initiatives

- Individual Media Visits
 - Multi-island
 - FestPAC
- Maui Recovery
 - Virtual Media Blitz
 - Mana Up x Shopify Pop-Up in SoHo, New York
 - Healdsburg Food & Wine Experience
 - Northern California Media Blitz
- Statewide Virtual Media Blitz
 - Week of one-on-one appointments with 30-40 media from Hot 100 List



Member-only story

Kauai's Top 10: Unmissable Adventures and Scenic Spots

Shaun Melady · Follow
Published in Wellness Travel Adventures · 4 min read · 1 day ago



Forbes

Yes, You Should Go To Maui Now—And How To Help

Laurie Werner Contributor
I cover singular, luxury travel and food experiences around the world

Follow

Sep 12, 2023, 03:54pm EDT



Male members of Halau Hi'iakainamakalehua practiced their hula kahiko (ancient hula) performance. They used dense, wooden sticks to amplify their chant. In the past, hula provided an opportunity for Hawaiian men to train for combat.

Preserving Hula, the Heartbeat of Hawaii

For 60 years, the Merrie Monarch Festival has contributed to the reclamation of Hawaiian culture, language and identity.



TRAVEL+
LEISURE

SUBSCRIBE

TRIP IDEAS > ISLAND VACATIONS

How to Plan the Perfect Multi-island Trip to Hawaii

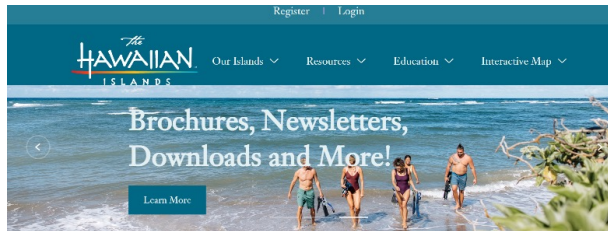
2024 PLAN TRAVEL TRADE



Training & Education

- Tourism Cares Meaningful FAM
 - Maui: Sep
- Execute Educational Blitz Events Targeting Key and Growth Markets
 - Denver, Salt Lake City: Jun
 - Raleigh, Charlotte, Nashville: Aug
 - Atlanta, Orlando, Washington DC: Oct
- Conduct FAMS
 - HTUSA-led multi-island FAMS
 - Support partner FAMS with an emphasis on Maui






Mālama (Care for) Maui by Visiting Mindfully

In West Maui, recent wildfires have resulted in the devastating loss of loved ones, homes, cultural and historic sites and businesses in Lahaina. We are grateful for the outpouring of support for Maui from around the world, from sharing memories and offering assistance, to asking questions about travel to Maui and the other Hawaiian Islands. Amidst the tragedy, the spirit of Maui remains strong. With the exception of Lahaina, we encourage your clients to visit the accessible areas of Maui mindfully. If your clients are considering visiting any of the Hawaiian Islands in the near future, including the accessible areas of Maui, please know that respectful travel is welcomed and encouraged, now more than ever. Their visit will support Hawaii's economy and make a positive impact on Maui's road to recovery.

Education

"I think you know Hawai'i? There's always more to discover!"

[Get Started](#)





Interactive Map


Explore the Hawaiian Islands with our interactive tool.


[Explore Now](#)

Resources

Download collateral, get marketing tools and more.

[View Resources](#)





Our Islands

Travel FAQs, festivals and events, accommodations and more.

[Learn More](#)

2024 PLAN TRAVEL TRADE

Trade Marketing

- Refresh Travel Trade website
- Develop "Know Before You Go" guides for advisors
- Update Hawai'i Destination Specialist (HDS) Curriculum
- Execute Wholesaler Co-op Program
- Support key consortia partners:
 - Virtuoso
 - Signature
 - Travel Leaders Network
 - The 1000 (new)

Q1 2024 RECAP

Q1 2024 ACCOMPLISHMENTS

PUBLIC RELATIONS

Highlights

- International Media Marketplace (IMM), NYC
 - Met with 45 national media
 - Participated in a Destination Marketing panel
 - Short-term; leads with CBS News, Thrillist, Outside Magazine and more
 - Solid pipeline for future media visits
- Maui Recovery Media Visits
 - AFAR
 - Conde Nast Traveler



AFAR



Condé Nast
Traveller

Q1 2024 ACCOMPLISHMENTS

Mālama Hawai'i Volunteer Dashboard

- Mālama Hawai'i and Voluntourism pages on gohawaii.com
- Partnership with Kanu Hawai'i
- Search & sign up for volunteer opportunities (all markets)
- Donate to community organizations

The screenshot displays the 'Ongoing Volunteer Experiences' dashboard. At the top, there is a navigation bar with tabs for ISLANDS, EXPERIENCES, CULTURE, PLANNING, and LANGUAGES. Below the navigation bar, the main heading is 'Ongoing Volunteer Experiences'. Underneath, there are filters for islands: O'AHU (299), MAUI (274), ISLAND OF HAWAII (144), KAUAI (59), and MOLOKAI (26). A 'Filter Results' section includes a search bar and checkboxes for 'RECURRING (799)', 'INCLUDE OPEN-ENDED (26)', and 'ONE TIME (3)'. Two featured volunteer opportunities are shown: 'Wetland Restoration Volunteers Needed in Hilo (February 2024)' on the Island of Hawaii, scheduled for February 17, 2024, and 'Daily Food Inspection - Dry Salvage' on Oahu, scheduled for February 23, 2024. The Hilo opportunity is part of the 'ĀINA HO'ŌLA INITIATIVE' and focuses on contributing to the revitalization of the land. The Oahu opportunity is at the 'HAWAII FOODBANK' and involves food inspection and dry salvage work.

Q1 2024 ACCOMPLISHMENTS

PGA TOUR

- Launched *Aloha Season* golf promotion on Golf Channel
- Continued support of Maui Recovery
- Executed player shoot capturing four PGA TOUR players:
 - Tom Kim
 - Adam Schenk
 - Seamus Power
 - Vincent Normman



Q1 2024 ACCOMPLISHMENTS

Travel Trade

Highlights

- Advisor Training
 - Travel Weekly Hawai'i Loves Travel Advisors Virtual Event
 - Webinar reached 612 advisors
 - 335 total unique visitors to virtual booth
 - 613 resources and videos viewed
 - Virtuoso On Tour
 - 40 appointments conducted
- 1764 certification courses completed YTD
- Launched new trade creative

**You know Hawai'i,
but are you a specialist?**

There are more ways than ever to experience these islands' timeless beauty, diverse activities and rich culture. These include opportunities for visitors to engage with and learn to *mālama* (care for) the natural environment, ecosystems and ways of life that make Hawai'i unique.

To learn more about how you can enrich your clients' Hawai'i experiences, we invite you to become a certified Hawai'i Destination Specialist.

[GET CERTIFIED >](#)

Our multi-tiered program supports you with the knowledge and insights that savvy travelers demand, including:

- Multiple tiers to complete at your own pace
- Qualified customer referrals
- Priority invitation to Hawai'i educational events
- Access to specialist-only webinars
- Use of the Hawai'i Destination Specialist badge
- Continuing education credits from The Travel Institute
- Travel discounts upon completion of all six certifications

[LEARN MORE >](#)

HAWAIIAN ISLANDS

2024 Goldline Airlines, Suite 900 Honolulu, HI 96813

Facebook, Twitter, Instagram icons

We recognize the use of linguistic markings of the past and Hawaiian language including the word 'Iki' (ghost) and the word 'Hawai'i' (Hawaii) as a place name of ancient Hawai'i. We acknowledge the cultural significance and the role of the Hawaiian language in the development of the Hawaiian Islands. We encourage the respectful use of the Hawaiian language and culture of Hawai'i and we thank all forms of communication.

PARTNERSHIP OPPORTUNITIES

PARTNERSHIP OPPORTUNITIES

HVCB/ ISLAND CHAPTER	ACTIVITY	DESCRIPTION	DATE	LOCATION	COST	CONTACT
CONSUMER						
HVCB	Mālama Hawai'i Program	Visitors are encouraged to give back to the destination by participating in the Mālama Hawai'i Program. The U.S. brand media campaign call-to-action drives to gohawaii.com/malama, which lists volunteer opportunities and offers.	Ongoing	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	\$0	Lei-Ann Field lfield@hvcb.org
HVCB, KVB, OVB, MVCB, IHVB	The Official Hawai'i Visitor Guidebooks: Experience Kaua'i Experience O'ahu Experience Maui, Molokai, Lāna'i Experience Hawai'i Island	The Hawai'i Visitor Guidebooks are the official post-arrival, island-specific guides for Kaua'i, O'ahu, Maui/Moloka'i/Lāna'i and Island of Hawai'i. They are published semi-annually in print and digital formats for use in-destination to promote local activities, dining, shopping, products and services. Distributed at airports and key strategic visitor locations on each island.	Semi-Annual	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	Varies	HVCB Membership membership@hvcb.org
HVCB	Enewsletters: Islands of Aloha Express	Consumer newsletter offers partners an opportunity to reach up to 215,000 opted-in subscribers who have expressed an interest in traveling to the Hawaiian Islands. It includes stories about Hawai'i, festivals and events calendar, travel planning tips, and special offers.	Monthly	U.S.	Varies	HVCB Membership membership@hvcb.org
TRAVEL TRADE						
HVCB, KVB, OVB, MVCB, IHVB	U.S. Leisure Educational Blitzes	Travel advisor educational workshops are conducted in key and growth markets. The event format includes island-specific destination updates, Hawaiian culture experts, Hawai'i partner trade show, partner presentations and networking.	Jun Aug Oct	Denver, Salt Lake City Raleigh, Charlotte, Nashville Atlanta, Orlando, Washington D.C.	Varies	Robyn Basso basso@hvcb.org
KVB	Webinars	Webinars to promote mālama Kaua'i, unique island activities and provide destination updates.	Mar, Aug	U.S.	\$0	Maile Brown Maile@hvcb.org
OVB	"What's New On O'ahu" Destination Updates Webinars	Webinars highlighting updates and what's new on O'ahu.	Quarterly	U.S.	\$0	Karishma Chowfin karishma@visit-oahu.com
MVCB	Educational Webinars: Maui	Advisors receive Maui Nui destination updates, including resorts, activities, events and travel in and around Maui Nui and the Hawaiian Islands.	Quarterly	U.S.	\$0	June Pagdilao june@mauivb.com
IHVB	Island of Hawai'i Educational Webinars	Target top Hawai'i retail travel advisors and wholesale partners to share destination messaging and island of Hawai'i updates.	Quarterly	U.S.	\$0	Deanna Isbister disbister@hvcb.org

PARTNERSHIP OPPORTUNITIES

HVCB/ ISLAND CHAPTER	ACTIVITY	DESCRIPTION	DATE	LOCATION	COST	CONTACT
PUBLIC RELATIONS						
HVCB, KVB, OVB, MVCB, IHVB	Individual Media Visits	HVCB and the Island Chapters work closely to coordinate multi-island and island-specific visits for qualified journalists, incorporating Mālama Hawai'i. Partners contribute accommodations, activities, meals.	Ongoing	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	In-Kind Support	HVCB: Lei-Ann Field lfield@hvcb.org KVB: Shere'e Quitevis sheree.quitevis@finnpartners.com OVB: Cheyenne Gomez cheyenne.gomez@finnpartners.com MVCB: Leanne Pletcher leanne@mauivb.com IHVB: Donna Kimura dkimura@hvcb.org
HVCB, KVB, OVB, MVCB, IHVB	Virtual Media Blitz	HVCB and the Island Chapters coordinate appointments with key media via Zoom to share destination updates and promote Mālama Hawai'i and mindful travel.	August		\$0	HVCB: Lei-Ann Field lfield@hvcb.org
KVB	News Release: What's Blooming on the Garden Island	News release distributed on a quarterly basis to media, stakeholders and international contractors.	Quarterly	U.S.	\$0	Maile Brown maile@hvcb.org
OVB	Media eNewsletter: News, Updates and Aloha from O'ahu	Quarterly eNewsletter sent to OVB media database with the latest information on industry updates. This is shared with HTA's Global Marketing Partners (GMTs) and adjusted for Travel Trade distribution.	Quarterly	U.S.	\$0	Kalei Kaaiarii Kalei.kaaiarii@finnpartners.com Noelani Schilling-Wheeler noelani@visit-oahu.com
MVCB	Enewsletter: Message from Maui Nui	Enewsletter sent to partners requesting the latest information on accommodations, restaurants and activities. Primary audience is travel media as well as industry partners.	Quarterly	U.S.	\$0	Leanne Pletcher leanne@mauivb.com
IHVB	Eblast: What's Sizzlin'	Themed email distributed to media, stakeholders, and global marketing partners. A copy of What's Sizzlin' also resides on the GoHawaii media site.	Distributed bi-monthly	U.S.	\$0	Donna Kimura dkimura@hvcb.org

MAHALO!

2024 PLAN

U.S. LEISURE - 2024 BASELINE CONSUMER PAID MEDIA														
			JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Partner	Start Date	End Date												
Advanced TV														
Amazon	1/4 - 6/30	8/1 - 10/31	[Yellow]							[Yellow]				
LG														
Roku														
Samsung														
Digital + CTV														
AdTheorent	1/4 - 6/30	8/1 - 10/31	[Yellow]							[Yellow]				
Nexsen														
Octillian														
Teads														
Viant														
Zeta														
OMDprogrammatic														
Custom Content														
Conde Nast Traveler	8/1 - 10/31									[Yellow]				
Matador														
Paid Social														
Facebook & Instagram	1/2 - 12/30	[Yellow]												
Pinterest														
YouTube														
TikTok														
Search														
Google Search	1/4 - 6/30	[Yellow]							[Yellow]					
	8/1 - 10/31													