

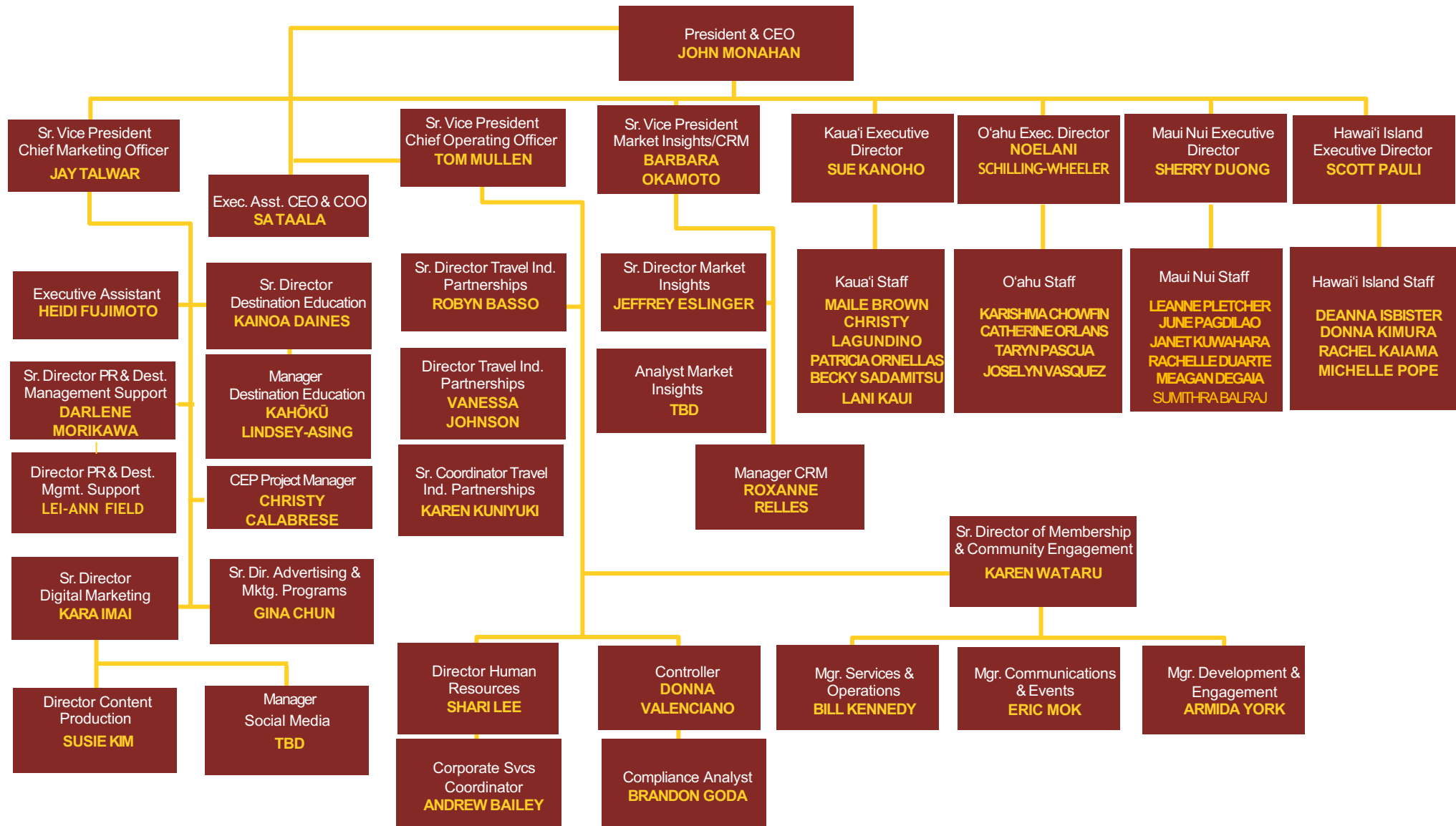


2024 Brand Marketing Plan

Jay Talwar

Chief Marketing Officer, Senior Vice President

HAWAI'I TOURISM USA TEAM



MARKET SITUATION

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OUTBOUND TRAVEL / TRAVEL SENTIMENT

U.S. Economic Downturn Will Be Mild

- Consumers remain inclined to spend but will be more intentional with their purchases—particularly for more expensive, interest rate-sensitive items.
- Travel related spending will remain largely resilient and continue on a positive trajectory, despite elevated inflation for goods and services.
- As a result, domestic travel has fully recovered and is settling into a sustainable pace (+1.4 percent in 2023, +3.1 percent in 2024).
- US travelers state that taking time off to travel is more important than ever; significantly higher than in Q1 (35 percent).
- Domestic leisure travel has been the main driver of the U.S. travel recovery and has recovered to pre-pandemic levels significantly more than Q1 (+29 percent)

MARKET SITUATION

HAWAI'I FORECAST AND PERFORMANCE

- Compared to the same period in 2019:
 - Hawai'i's economy (GDP) recovered to 97 percent in the first quarter of 2023,
 - During the first seven months of 2023, the labor force recovered to 98.8 percent.
- Economic Impact of the Maui Wildfire: The Maui wildfire took the lives of over 100 people, numerous cultural sites, destroyed more than 2,000 homes and more than 800 business establishments, employing about 7,000 employees. The daily total business revenue of those establishments is estimated to be \$2.7 million a day.
- Largely due to the Lahaina wildfire tragedy, DBEDT revised its economic growth projections for 2023 and 2024 downward, from 1.8 percent to 1.1 percent for 2023 and from 2.0 percent to 1.5 percent for 2024.



MARKET SITUATION

U.S. TRANS-PACIFIC AIR SEAT SYNOPSIS 2024 PROJECTIONS

	# of SEATS 2019 Jan-June	# of SEATS 2023 Jan-June	# of SEATS 2024P Jan-June	% Change 24/19	% Change 24/23
O'ahu	2,413,284	2,889,030	2,713,781	11.1%	-6.5%
Maui	1,275,965	1,507,009	1,296,094	1.6%	-14.0%
Kona	581,808	654,810	598,337	2.8%	-8.6%
Kaua'i	481,642	515,569	460,395	-4.4%	-10.7%
Hilo	21,654	1,162		-100.0%	-100.0%
Total	4,774,353	5,567,580	5,068,607	6.2%	-9.0%

MARKET SITUATION

BOOKING PACE



2023 Year-to-Date On the Books vs. YTD 2022

- O'ahu Room Nights -12.1%, **Revenue -2.8%**, ADR +10.6%
- Maui Room Nights -27.4 %, **Revenue -20.2%**, ADR +9.9%
- Kaua'i Room Nights +1.2%, **Revenue +9.4%**, ADR +8.1%
- Island of Hawai'i Room Nights -5.5%, **Revenue -3.8%**, ADRs +1.8%

Hawai'i booking pace down 10% for 2024

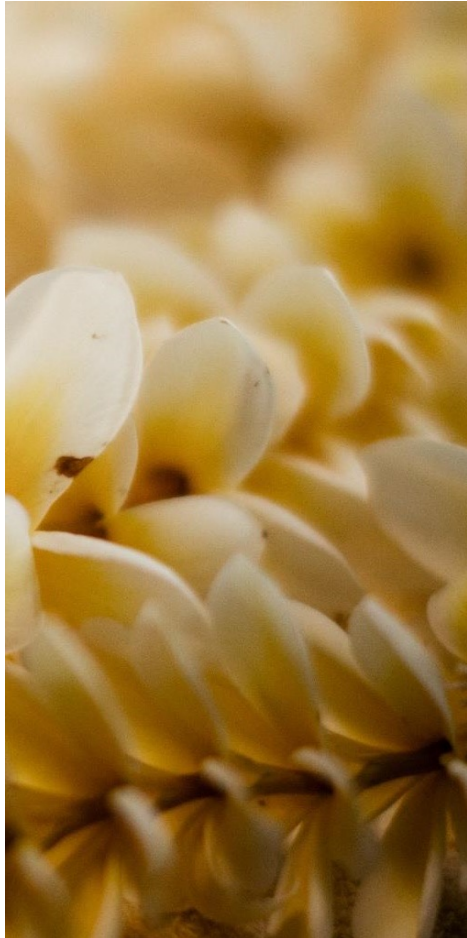
- Maui dropped by **-29%**
- O'ahu has maintained pacing
- Kaua'i has seen pickup of **+23%**
- Island of Hawai'i has had a **slight drop** in pace.

2024 Outlook vs 2023

- **Destination Room nights -14.5%, Revenue -17.3%, ADRs -3.3%**
- O'ahu Room Nights -1.9%, Revenue flat, ADR +2%
- Maui Room Nights -44.5%, Revenue -41.6%, ADR +5.1%
- Kaua'i Room Nights +21%, Revenue +19.9%, ADR -1%
- The Island of Hawai'i Room Nights +29%, Revenue +23.8%, ADR -4%

MARKET SITUATION

COMPETITIVE LANDSCAPE



Tourism destinations around the globe are back marketing to U.S. travelers:

- In rank order, the 2023 US traveler is going to these international destinations: Italy, UK, Mexico, France, Canada, Ireland, Japan.
- European countries are among the most popular destinations of the summer, which brings in "Overtourism" concerns and resulting rules and regulations to curb the negative aspects of tourism. These rules often go hand-in-hand with sustainability initiatives, as these destinations see the current trajectory as being unsustainable.

TARGET AUDIENCE

TARGET AUDIENCE

THE MINDFUL HAWAI'I TARGET TRAVELER



The Service-Minded

Values making a difference in the world and is likely to seek a Hawai'i experience punctuated by voluntourism.



The Culturally Curious

Has a deep interest in learning about other cultures and is likely to seek a visit to Hawai'i that immerses them in local community and cuisine.



The Eco-Conscious

Prioritizes care for the planet and is likely to seek a visit to Hawai'i that favors eco-friendly, sustainable experiences.

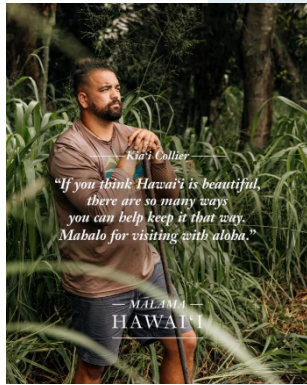


The Unobtrusive Explorer

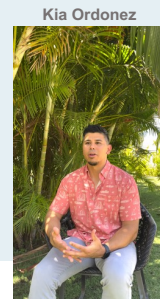
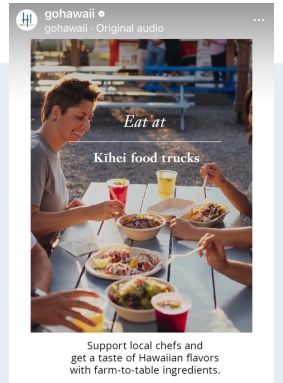
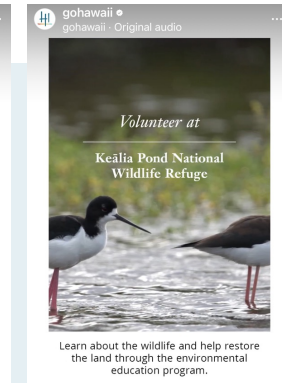
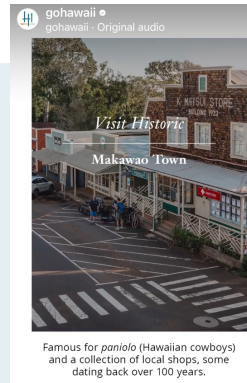
Enjoys adventurous new experiences and is likely to seek a visit to Hawai'i centering on once-in-a-lifetime opportunities, or the great outdoors.

CORE BRANDING MESSAGE

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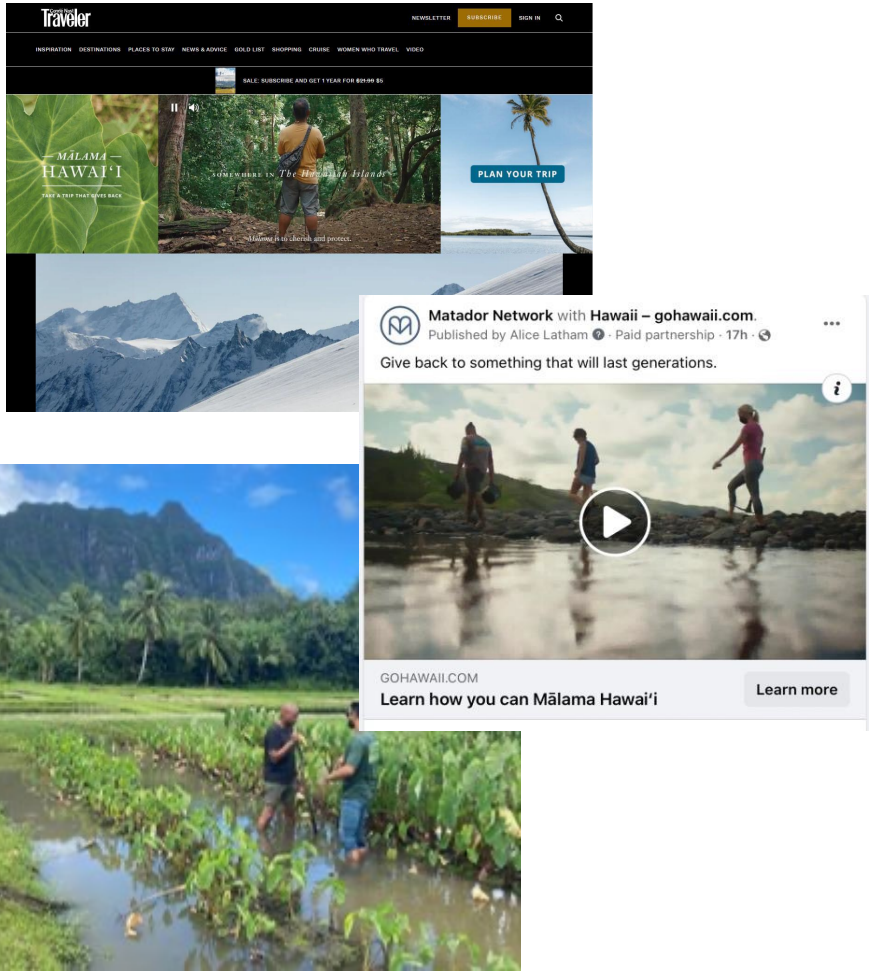
Mālama Hawai'i



Mālama Maui



STRATEGIES



Consumer

Deliver Mālama Hawai'i and Mālama Maui messaging to Mindful Hawai'i Target Travelers (MHTT).

Public Relations

Inspire media to create editorial content that attracts the MHTT and reshapes their perceptions of Hawai'i.

Travel Trade

Educate travel sellers who have MHTTs as clients, so they present Hawai'i in-line with the Hawai'i Tourism Authority's (HTA) branding mission and pillars.

Mālama Hawai'i

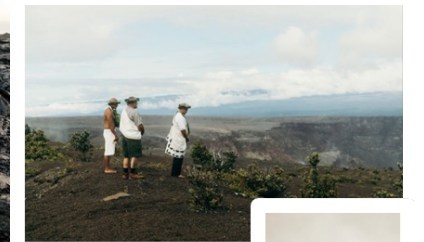
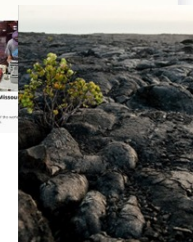
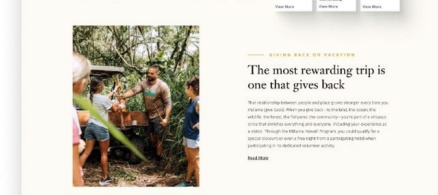
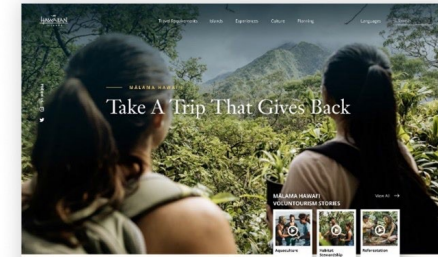
Change the perception of visiting Hawai'i from "come, play on our islands" to an invitation that:

- Educates visitors about the beauty of our culture before they visit,
- Shapes their behavior once they visit.

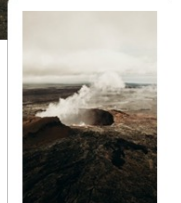
Mālama Maui

Re-create demand for Maui by adding dimension to the existing brand.

- Share the unique and attractive visitor activities and events across the island to have potential for even repeat visitors to realize there is so much more to do on Maui than they were aware of, including recovery volunteer opportunities.
- Doing so will create an opportunity for Maui-based businesses to survive as the messaging will create a desire for visitors to support local.



what is
Hawaiian
culture?



Hawai'i has for centuries been an archipelago filled with stories. And some of the oldest speak about the creation of this place by the Hawaiian goddess of fire. A deity best known throughout the islands today as Pele.

Fleeing long ago across the Pacific Ocean - running from a fight with her family - Pele stumbled on a chain of uninhabitable islands. made up then of nothing more than black rock. at the time. Deciding one of those barren islands might be a good place to put down her own roots. Pele plunged her magic ʻōʻō or digging stick. into that barren rock. calling up her sacred fires and lava that burned deep within the earth and giving life to the island of Kāua'i.

But while Pele settled into her new home on Kāua'i. the old stories say her sister and a goddess of the sea. Nīnālaakohala'i also known as Nānāka. was in close pursuit and angry about how Pele left things with her family. A ferocious battle of fire and water ensued. and Pele was eventually forced to retreat to another barren rock. in the uninhabited island chain. where she again plunged her magic ʻōʻō into the black rock. and made a new home on what we know today as the island of O'āhu.

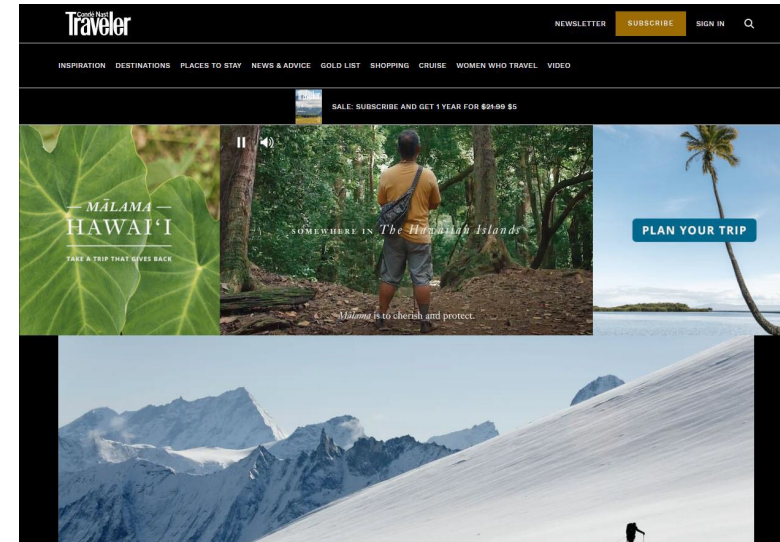
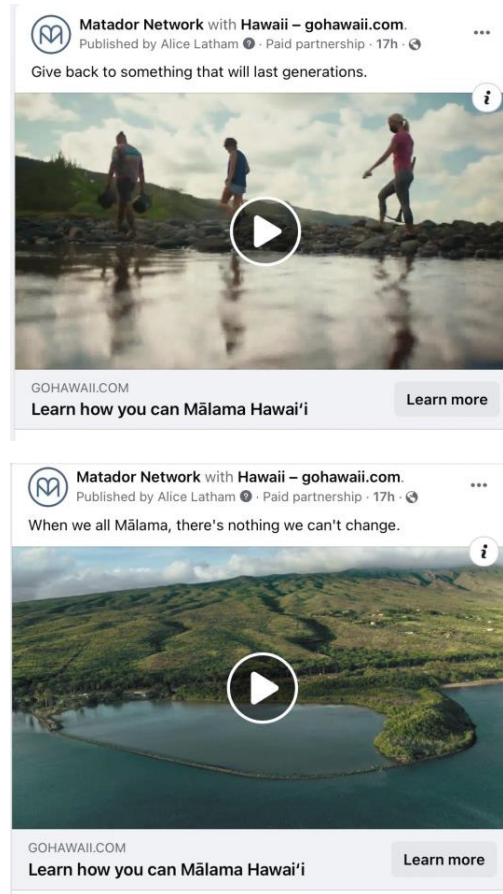
MAJOR PROGRAMS

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2024

Paid Media (Considered List)

- Digital and Paid Media
- Native Programs
- Social Media



MAJOR PROGRAMS

2024

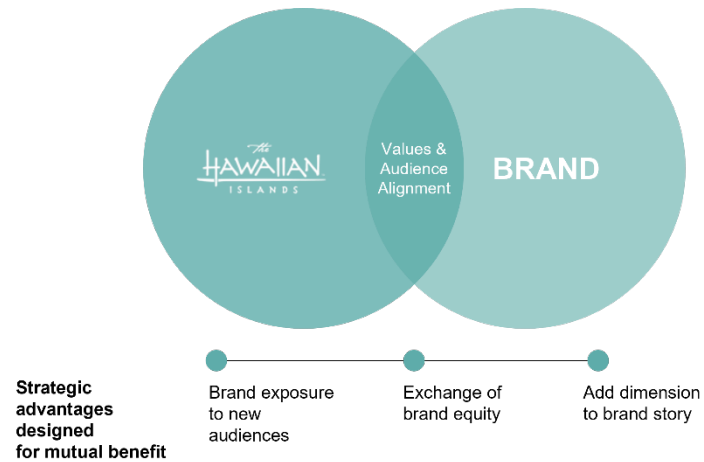
Support Local Initiative

- Fashion
- Retail
- Music
- Ag/Cuisine



Brand Partnership

- Currently exploring opportunities
- Integrating Maui based businesses

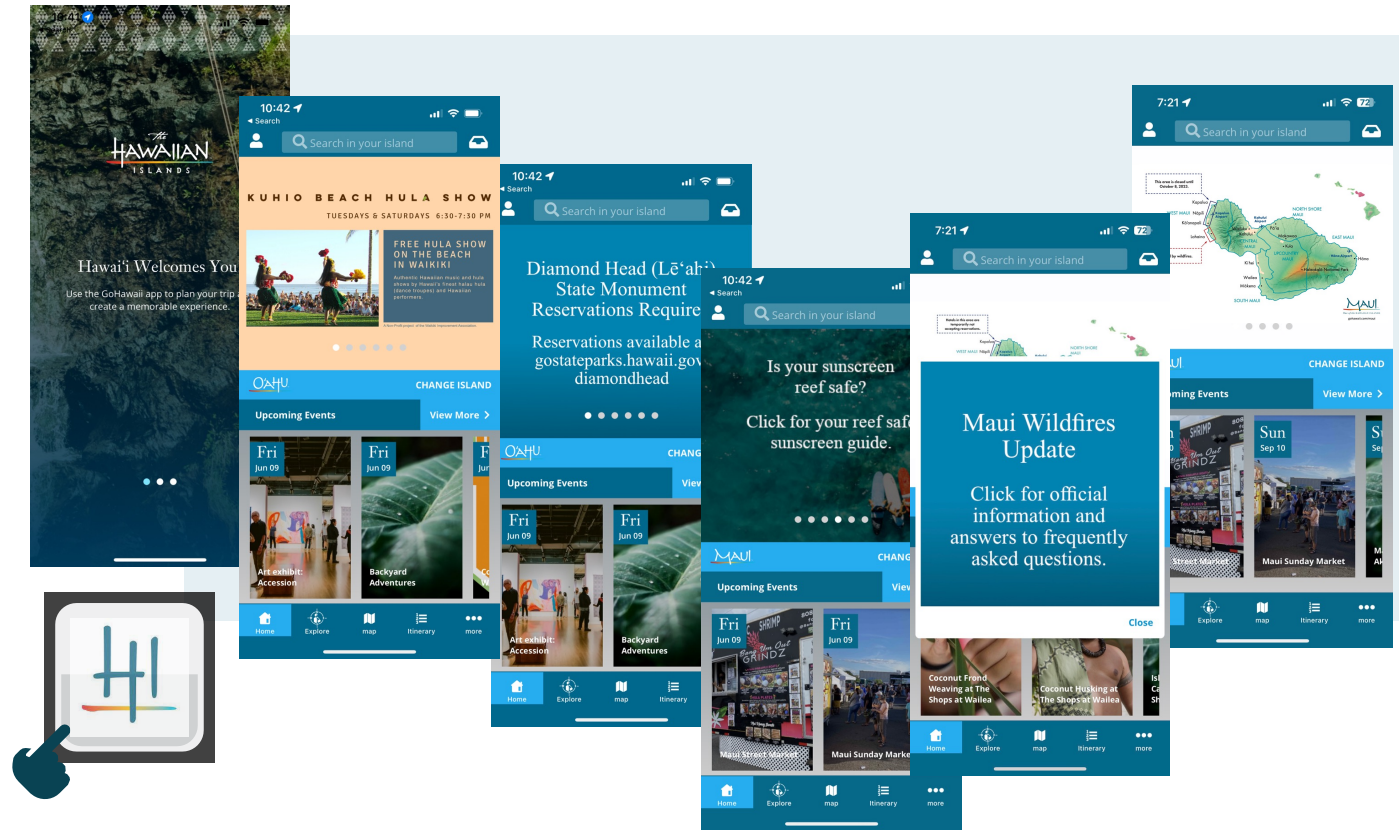


MAJOR PROGRAMS

2024

Consumer Direct

- Newsletters
- Special Offers
- GoHawaii app



Keep it Local. Buy Made-in-Hawai'i.

Searching for genuine gifts and finds from Hawaii to take back home? Look for 'Made in Hawaii' or 'Grown-in-Hawaii' labels on the stuff you buy. And check out these local boutiques and farmers markets to find them.

[READ MORE >](#)



- Land Safety**
Explore smartly, explore safely.
- Weddings & Honeymoons**
Plan your big day or get away afterward.
- Heritage Sites**
Learn more about what has shaped Hawai'i.
- Ocean Safety**
Observe these safety tips this winter.

MAJOR PROGRAMS

2024

Public Relations

- International Media Marketplace (IMM) – New York
- U.S. Media Blitz – New York
- FestPAC Press Trips
- Deeper storytelling including a heavy-up on Maui



AFAR

Is Now the Right Time to Travel to Maui? We Asked Locals.

After catastrophic wildfires leveled the western Maui town of Lahainā, the island's residents now say they are in the midst of a second crisis—the economic toll of a steep loss in tourism.



When visitors do come, locals ask that they be mindful of the trauma and devastation the island has been through since early August. Courtesy of Unsplash.



Preserving Hula, the Heartbeat of Hawaii

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

MAJOR PROGRAMS

2024

Travel Trade – Education

- Partnerships
 - Tourism Cares Meaningful FAM – Maui in May
- Wholesale, Consortia, Industry Events
 - Delta Vacations University, Virtuoso Travel Week, ASTA Global Convention
- Consortia Programs
 - New partner: The 1000
 - Support current partners: Virtuoso, Signature Travel Network and Travel Leaders
- Content Development
 - HDS Training Curriculum Update
- In-person & Virtual Education
 - In-market Educational Blitzes – Jan, Mar & Aug
- Trade Paid Media
- Leisure Group Business



Help your clients discover the meaning of mālama. agents.gohawaii.com

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HAWAIIAN
ISLANDS



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HAWAIIAN
ISLANDS

what is mālama?

Like so many words in the Hawaiian language, *mālama* has a number of different definitions. It can mean to take care of, to attend and cherish, to preserve and protect, and even to save. *Mālama* is a word that has been used to define our *kūlana* (responsibility) to the 'āina (land), its natural resources and each other for generations. *Mālama* is a *kūlana* that we also share with our guests who visit our home in Hawai'i.

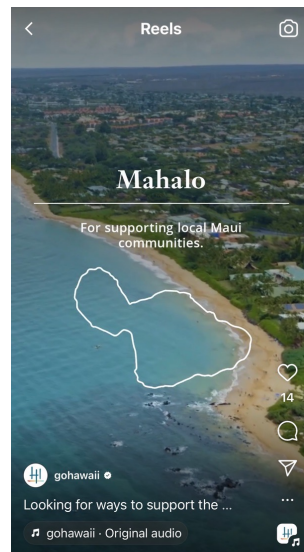
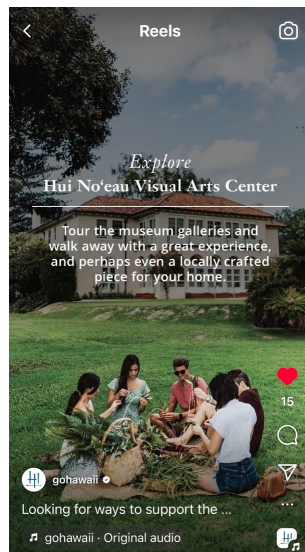
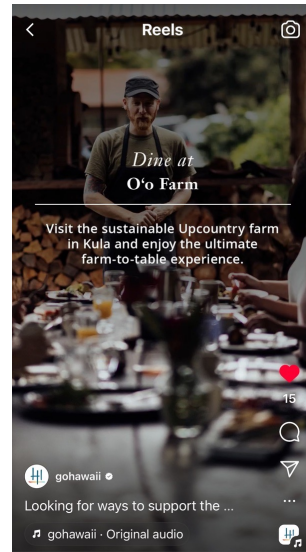
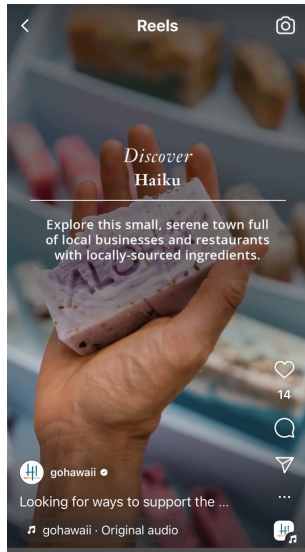
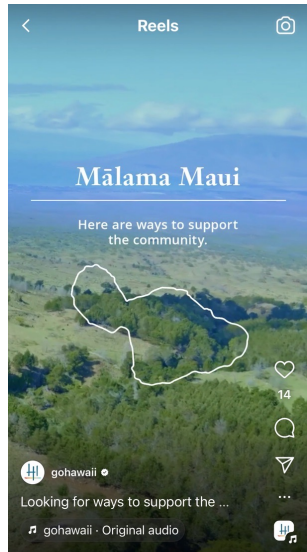


“It's not only about change but about healing. I think that's a big part of our work. We're healing the land, we're healing the people, we're healing ourselves.”

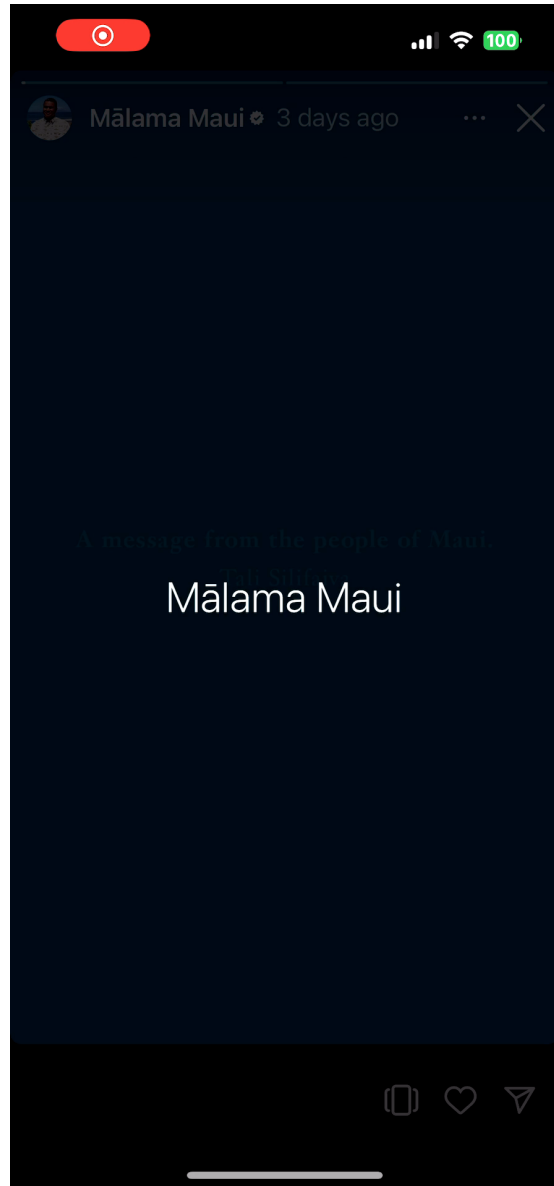
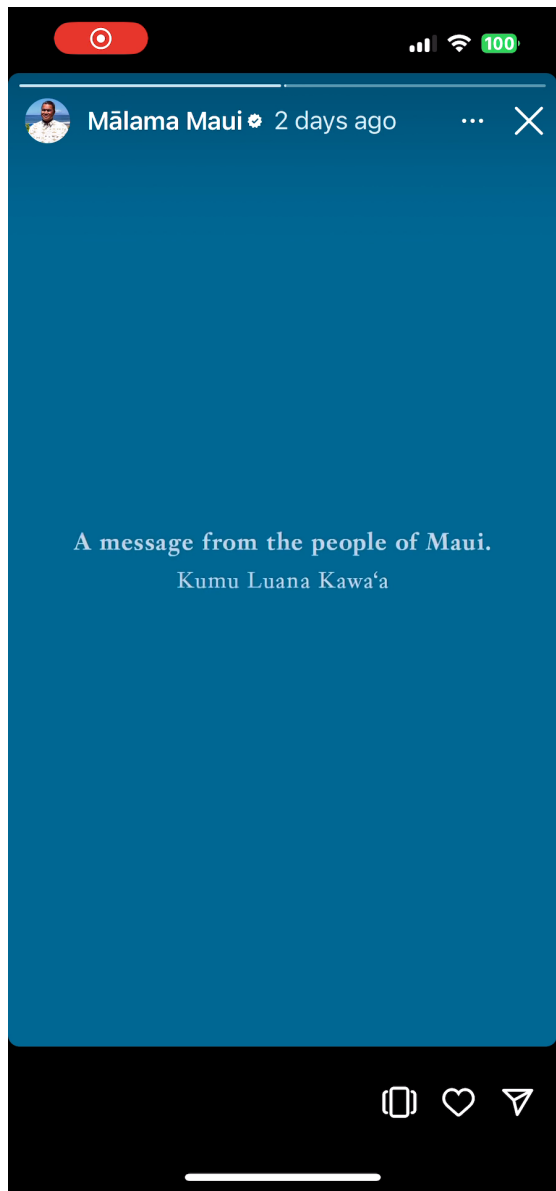
Noelani Lee,
Aquaculture Restoration

MĀLAMA MAUI

MĀLAMA MAUI



- **Social Media Engagement**
Creating Maui-focused social media content through both organic and paid strategies
- **Public Relations**
Pitching Maui stories through ongoing outreach and in-person meetings
- **Brand partnership**
Messaging includes support for Maui
- **Native Media Partnership**
Developing Maui-based content
- **Travel Trade**
Focusing on targeted advisor and consumer communications as well as in-person, virtual and in-destination education to rebuild travel demand to Maui



MĀLAMA MAUI - 2023

- **Industry Outreach**
 - **Amplify Government/HTA Messages –** Distribution to industry partners, travel advisors, MCI clients, airlines, OTA, national media
- **Consumer Direct**
 - **Social Media Engagement** Creating Maui-focused social media content through both organic and paid strategies
 - **Owned Channels** Gohawaii.com, Enewsletters, Gohawaii app
- **Public Relations** Pitching Maui stories through ongoing outreach and in-person meetings
- **Travel Trade** Focusing on targeted advisor and consumer communications as well as in-person, virtual and in-destination education

PARTNERSHIP OPPORTUNITIES

2024 PARTNERSHIP OPPORTUNITIES

ACTIVITY	DATE	DESCRIPTION	LOCATION	COST
Mālama Hawai'i Program – Volunteer Experiences	ongoing	Visitors are encouraged to give back to the destination by participating in the Mālama Hawai'i Program. The U.S. brand media campaign CTA drives to the website, which lists volunteer opportunities via Kanu Hawai'i's dashboard.	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	\$0
Mālama Hawai'i Program – Hotel Offers	ongoing	In addition to promoting enriching volunteer experiences, hotel partners can build special Mālama Hawai'i packages to be listed on the Mālama Offers page.	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	\$0
U.S. West Leisure Educational Blitzes	Jan & Mar	Travel advisor educational workshops will be conducted in four U.S. West markets.	8 events in key Northern and Southern California and PNW travel markets, TBC	\$900 - \$1,350 per event
Mālama Maui Co-op	Spring	Tactical, digital cooperative marketing program for the Maui Recovery to drive business from the U.S. market. Limited participation.	U.S.	varies
Tourism Cares Meaningful FAM	May	Inaugural Meaningful FAM hosted on Maui will connect Hawai'i-based organizations who embrace sustainable practices with top wholesale and consortia partners.	Maui	TBA
U.S. Leisure Educational Blitz	Aug	Travel advisor educational workshops will be conducted in four U.S. markets.	4 events in key markets TBD	\$900 - \$1,350 per event

Partnership Opportunities



<https://www.hawaiitourismauthority.org/what-we-do/partnership-opportunities/>

2024 BMP BUDGET

2024 BMP BUDGET

Budget Category	Amount
Consumer Direct	\$8,689,840
Public Relations	\$1,123,600
Travel Trade	\$1,279,560
Research	\$100,000
Admin	\$3,157,000
Total:	\$14,350,000

MAHALO!