

Hawai'i Tourism Authority Budget, Finance, and Convention Center Standing Committee Meeting

December 13, 2024



Agenda

Wildfire Incremental Budget Requests

- a) US Marketing Maui Recovery Plan 1
 - i. \$2,600,000 Emergency Special Funds (FY24)
- b) US Marketing Maui Recovery Plan 2
 - i. \$2,950,000
 - 1. \$1,350,000 General Funds (FY24)
 - 2. \$1,350,000 Emergency Special Funds (FY24)
 - 3. \$250,000 General Funds (FY25)
- c) US Marketing Maui Recovery Plan 3
 - i. \$100,000 Emergency Special Funds (FY24)

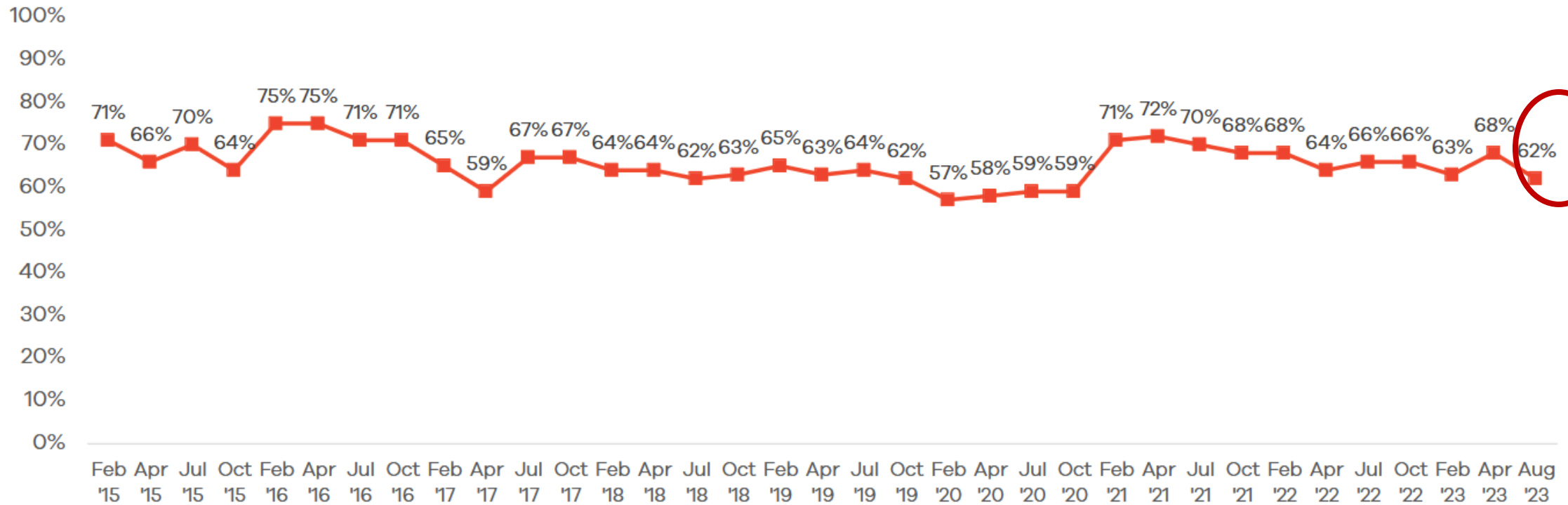


**US Marketing
Maui Recovery Plan 1
August – November 2023**



Interest In Visiting Hawai'i Dropped Significantly Post Fires After a Significant Increase in Early Spring.

Interest in Visiting Hawai'i Next Two Years
(Top 2 Box)



Hawai'i Tourism Proprietary Question

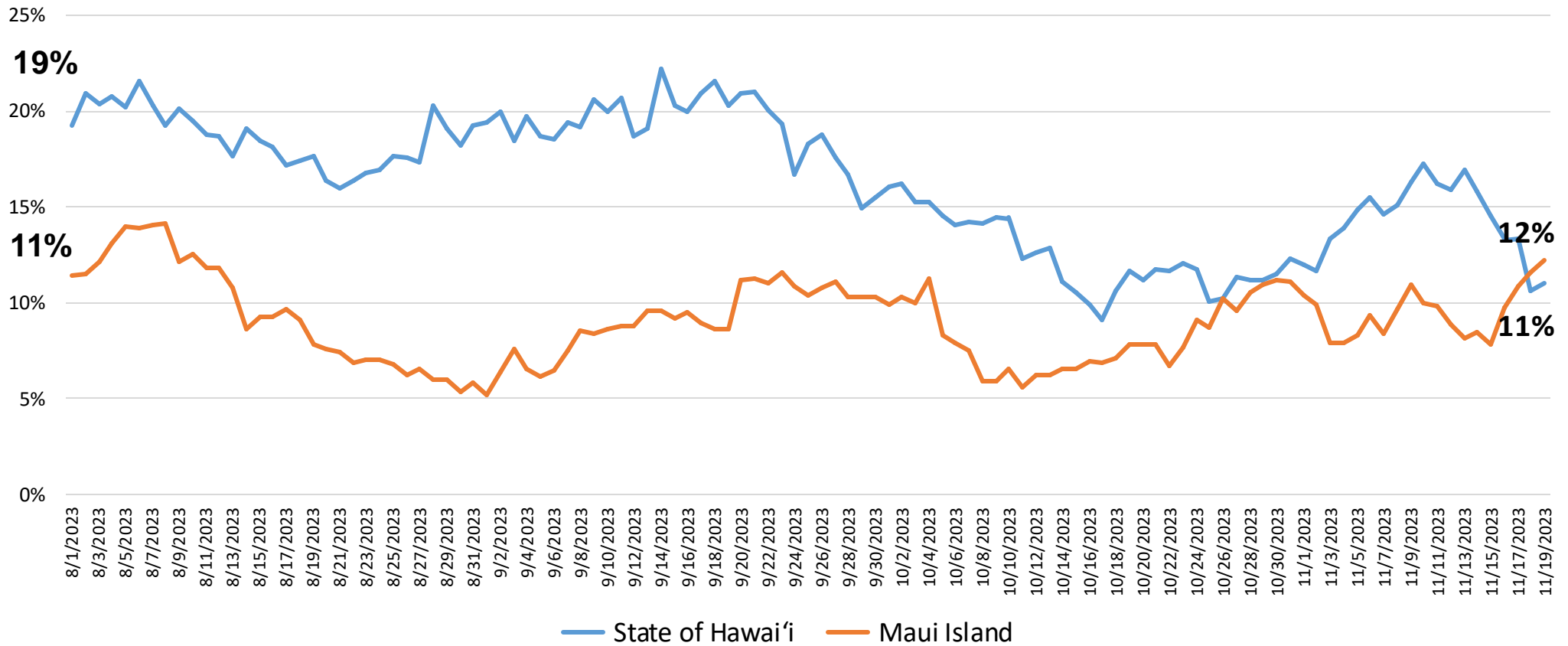
Base: Air Travelers (n=1,767)
Source: MMGY Global's 2023 *Portrait of American Travelers*® "Fall Edition"



Source: HVCB analysis of DBEDT/MMGY data

U.S. Hawai'i Target Traveler - Intent to Travel to State of Hawai'i and Maui Island

2 Week Rolling Average August 1- November 19, 2023



Source: HVCB analysis of DBEDT/Vision Insight data

U.S. Hawai'i Target Traveler Intent to Travel to State of Hawai'i and Maui Island Recontact Survey Results

Of those Intending on travel to Maui;

- 45% say they haven't booked their trip yet to Maui, but still intend to
- 29% say they will not be booking a trip to Maui
- 11% are still traveling as planned

For those who haven't booked their trip yet to Hawai'i or are no longer planning to travel to Hawai'i, the top two reasons are:

- Cost or change fees (45%)
- Out of respect for the victims and residents of Lahaina (38%)
- Concern for myself/family's safety (17%)

*Fielded 9/25-11/7	Total Statewide	Intend to Visit Maui but have not booked	Intended to visit Maui and will not be booking a trip
Cost or Change Fees	45%	41%	58%
Out of Respect for the residents of Lahaina	38%	43%	26%
Not sure of availability of amenities	22%	24%	18%
Concern for my own or family's safety	17%	18%	12%
I thought we cannot travel to Maui	15%	16%	16%

Maui Total Room Nights on the Books

As of November 26, 2023 CY vs 2022

Month	November 26, 2023	November 19, 2023	November 12, 2023	November 5, 2023
December 2023	+3.3%	-6.3%	-1.1%	-3.6%
January 2024	-5.6%	-3.7%	-2.8%	-1.4%
February 2024	-26.4%	-26.1%	-25.4%	-26.1%
March 2024	-28.5%	-28.0%	-26.1%	-26.0%
April 2024	-27.9%	-26.6%	-26.3%	-25.4%
May 2024	-28.0%	-27.0%	-25.6%	-25.6%
June 2024	-41.3%	-41.5%	-41.6%	-41.1%
July 2024	-31.0%	-30.4%	-30.8%	-30.6%
August 2024	-39.6%	-38.3%	-39.2%	-38.2%
September 2024	-36.1%	-32.4%	-32.8%	-34.3%
October 2024	-47.0%	-48.6%	-48.1%	-46.8%

West Maui Total Room Nights on the Books

As of November 26, 2023

Month	November 26, 2023	November 19, 2023	November 12, 2023	November 5, 2023
December 2023	+8.1%	-6.2%	+1.8%	-0.3%
January 2024	-26.8%	-25.3%	-23.3%	-20.5%
February 2024	-39.4%	-38.6%	-36.3%	-36.6%
March 2024	-41.3%	-40.3%	-38.2%	-37.8%
April 2024	-46.0%	-44.4%	-41.9%	-40.2%
May 2024	-52.0%	-49.5%	-46.9%	-48.1%
June 2024	-60.6%	-60.6%	-60.6%	-60.2%
July 2024	-40.3%	-39.5%	-41.1%	-41.6%
August 2024	-61.8%	-61.2%	-62.4%	-61.6%
September 2024	-47.3%	-41.7%	-42.2%	-41.9%
October 2024	-27.3%	-27.8%	-24.2%	-15.8%

Budget – Maui Recovery #1

Mid-August through November 2023

Consumer Messaging	\$ 1,700,000
Travel Trade	\$ 300,000
MCI	\$ 600,000
Total:	\$ 2,600,000

2023 Recovery Plan Overview

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

Consumer Direct

Organic/Paid Social Media – Facebook, Instagram, YouTube | PGA, LG

PR – Virtual Media Appointments, Individual Media Visits

PR – Southern California Media Blitz

PR – CNT Points of View, NY Media Blitz

PR – Satellite Media Tour

CRM – E-newsletters owned DB, Lookalikes

Gohawaii.com Mālama Maui Content and Updates

Travel Trade

Signature Owners Meeting
Delta Vacations University

ALG Vacations ASCEND

Paid Advertising – Northstar, Travalliance, Meta + opportunistic

Consortia Programs - Virtuoso, Signature, Travel Leaders

Co-op Program

Meet Hawai'i

Retention and Business Development; Strategic Partner Sales and Marketing; Paid Digital Media

IMEX – Maui Strong Messaging

Social Messaging

- Kupa 'āina (series of 8)
- Each video shares their personal connection to Maui and encourages travel to support their local communities.

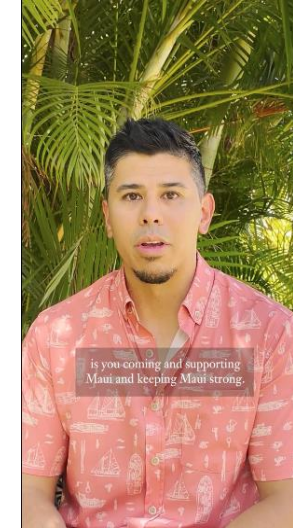
Tali Silifaiva



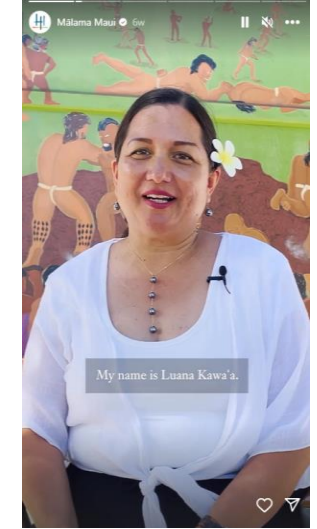
Kalei 'Uwēko'olani



Kia Ordonez



Luana Kawa'a
"Kumu Luana"



Cody Pueo Pata



Shay Smith



Chef Taylor Ponte



Wendy Tuivaioge
"Aunty Wendy"



2023 Targets/Results

MRP #1 – August to December 2023 Targets to Actuals

- Consumer Messaging via Social Media. Placements on Facebook, Instagram, YouTube, and X
 - Cumulative Targets = 142,626,141 Total Impressions Gained and 31 posts
 - Cumulative Actuals = 145,416,599 Total Impressions Gained and 67 posts
 - Overall Targets hit and exceeded by an average of 158.99%
- Consumer Messaging via Public Relations. Media interactions, media visits, and earned placements
 - Cumulative Targets = 327 Measures
 - Cumulative Actuals = 352 Measures
 - Overall Targets hit and exceeded by an average of 107.96%
- Travel Trade Coop & Messaging
 - Airline/Hotel Coop: Hawaiian, Alaska, Southwest, Marriott, Hilton
 - Cumulative Actuals = 278,893,175 Total Impressions
 - Trade Media: Due to limited availability of quality inventory, shifted budget into training and education
 - Cumulative Actuals = 445,388 Total Impressions
- MCI Programs & Partnerships
 - Minimized loss of scheduled groups, retained contracted meetings representing \$70 million in economic impact to the state.
 - Engaged with six strategic partnerships on integrated sales and marketing recovery plans.
 - Limited programs ran in the short 2023 window and some tactics were extended into 2024.
 - Northstar, SITE, Helms Briscoe, HPN Global, CEMA, IRF
 - Cumulative Actuals = 1,773,486 Total Impressions

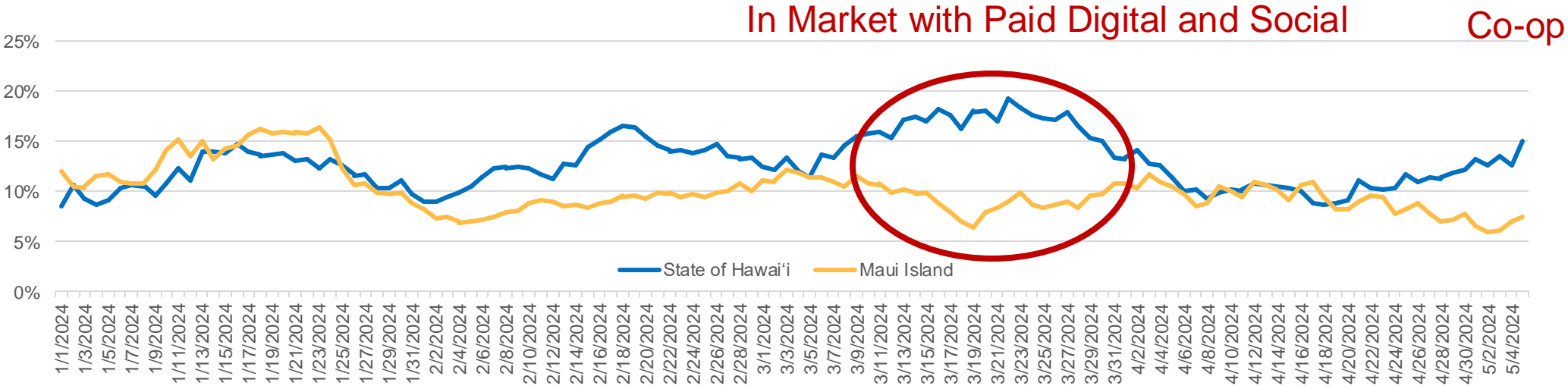


**U.S. Marketing
Maui Recovery Plan 2
January – June 2024**



U.S. Hawai'i Target Traveler - Intent to Travel to State of Hawai'i and Maui Island

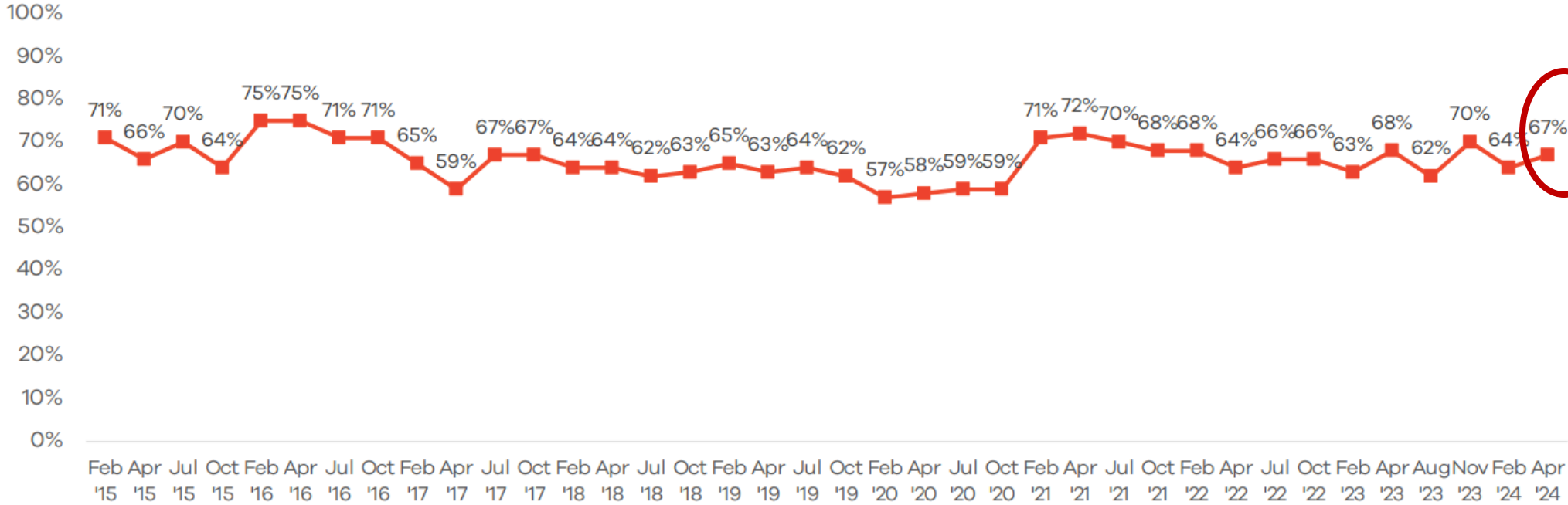
2 Week Rolling Average January 1- May 5, 2024



Source: HVCB analysis of DBEDT/Vision Insight data

Interest In Visiting Hawai'i Has Increased From Last Wave But Is Unchanged From This Time Last Year

Interest in Visiting Hawai'i Next Two Years
(Top 2 Box)



Hawai'i Tourism Proprietary Questions

Base: U.S. Leisure Travelers (n=3,591)
Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"



Source: HVCB analysis of DBEDT/MMGY data

Maui Total Room Nights Booked and Consumed on the Books

As of June 23, 2024 YOY

Month	June 23, 2024	June 16, 2024	June 9, 2024	June 2, 2024
February 2024	-0.2%	-0.2%	-0.1%	-0.1%
March 2024	-2.6%	-2.6%	-2.6%	-2.6%
April 2024	+1.8%	+1.8%	+1.8%	+1.8%
May 2024	-8.1%	-8.1%	-8.1%	-8.1%
June 2024	-12.0%	-12.2%	-12.5%	-12.8%
July 2024	-10.9%	-14.7%	-16.2%	-16.9%
August 2024	-16.9%	-17.2%	-17.3%	-18.5%
September 2024	-33.8%	-34.0%	-34.9%	-35.3%
October 2024	-34.6%	-34.8%	-36.0%	-36.0%
November 2024	-28.2%	-28.3%	-28.1%	-28.3%
December 2024	-27.2%	-28.6%	-30.6%	-29.9%
January 2025	-24.3%	-25.9%	-27.2%	-28.3%
February 2025	-13.7%	-17.0%	-20.3%	-22.0%
March 2025	-15.9%	-20.7%	-21.0%	-22.4%
April 2025	-20.2%	-21.4%	-22.9%	-25.5%
May 2025	-17.6%	-16.0%	-18.1%	-20.2%

West Maui Total Room Nights Booked and Consumed on the Books

As of June 23, 2024 YOY

Month	June 23, 2024	June 16, 2024	June 9, 2024	June 2, 2024
February 2024	-0.1%	-0.1%	-0.1%	-0.1%
March 2024	-4.4%	-4.4%	-4.4%	-4.4%
April 2024	-9.1%	-9.1%	-9.1%	-9.1%
May 2024	-10.1%	-10.1%	-10.1%	-10.1%
June 2024	-14.3%	-14.3%	-13.9%	-14.1%
July 2024	-11.4%	-17.1%	-18.2%	-18.9%
August 2024	-21.9%	-22.2%	-21.8%	-22.6%
September 2024	-41.0%	-41.7%	-43.5%	-45.0%
October 2024	-35.4%	-36.1%	-37.3%	-36.7%
November 2024	-26.4%	-27.2%	-26.2%	-26.7%
December 2024	-35.0%	-38.0%	-38.8%	-38.8%
January 2025	-3.9%	-6.9%	-6.7%	-8.1%
February 2025	-22.0%	-28.5%	-31.8%	-36.2%
March 2025	-28.8%	-40.3%	-40.8%	-41.1%
April 2025	-28.5%	-30.5%	-28.9%	-31.6%
May 2025	-23.2%	-20.3%	-18.1%	-18.9%

Budget – Maui Recovery #2

January through June 2024

Consumer Direct	\$ 2,200,000
Public Relations	\$ 350,000
Travel Trade	\$ 400,000
Total:	\$ 2,950,000

2024 Recovery Plan Overview

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

Public Relations

Proactive Pitching / Media Visits

International Media Marketplace

Virtual Media Blitz

Bay Area Media Blitz

SF Bay Area Experiential Event

Consumer

Organic/Paid Social Media – Facebook, Instagram, YouTube, TikTok

Kupa 'Āina (series of 8) | Maui locals/voices sharing their stories

Ola Maui Campaign | Come visit us – Highlighting Maui towns, local businesses and experiences

Gohawaii.com Mālama Maui Content and Updates

Travel Trade

Consortia Programs - Signature, Virtuoso, Travel Leaders Network

Trade Partner Programs

Trade Partner Training

HTUSA/MVCB- led FAMS & Partner FAM Support

2024 Targets/Results

MRP #2 – January to June 2024 Targets to Actuals

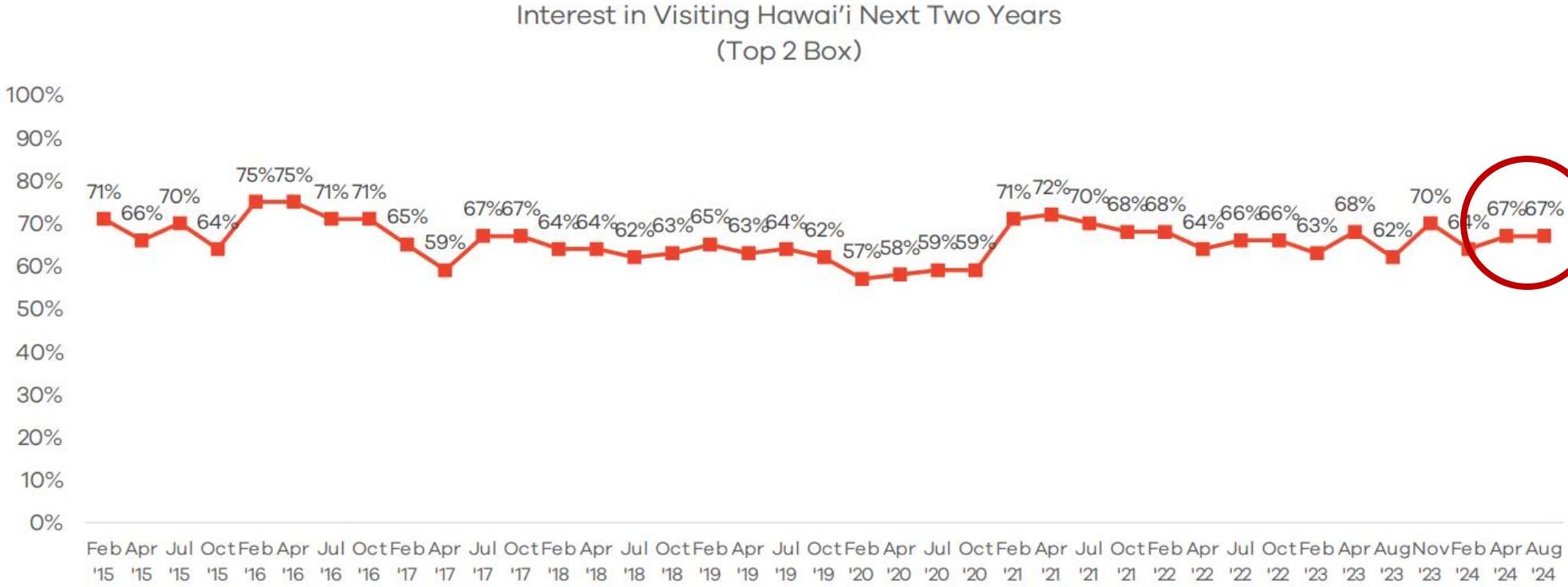
- Consumer Messaging via Social Media. Placements on Facebook, Instagram, YouTube and TikTok
 - Cumulative Targets = 83,342,650 Total Impressions Gained and 38 posts
 - Cumulative Actuals = 241,495,943 Total Impressions Gained and 10 posts
 - Overall Targets hit and exceeded by an average of 173.33%
 - Note: The shortened program timeline from 12 to six months reduced post volume, but improved ad strategy and concentrated spending drove more effective platform performance
- Public Relations via Media interactions, media visits, and earned placements
 - Cumulative Targets = 235 Measures
 - Cumulative Actuals = 639 Measures
 - Overall Targets hit and exceeded by an average of 201.05%
- Travel Trade via Travel Trade Shows, Attendance, and Appointments; Education Sessions and Participants; FAMs and Participants
 - Cumulative Targets = 2,480
 - Cumulative Actuals = 5,873
 - Overall Targets hit and exceeded by an average of 126.53%



**U.S. Marketing
Maui Recovery Plan 3
Mid-October – Mid-November 2024**



Interest In Visiting Hawai'i Has Increased From Last Wave But Is Unchanged From This Time Last Year



Hawai'i Tourism Proprietary Question

Base: U.S. Leisure Travelers (n=3,803)
 Source: MMGY Global's 2024 *Portrait of American Travelers*® "Summer Edition"



Maui Total Room Nights Booked and Consumed

As of November 24, 2024 CY vs 2022

Month	November 24, 2024	November 17, 2024	November 10, 2024	November 3, 2024
January 2024	+29.9%	+29.9%	+29.9%	+29.9%
February 2024	+21.0%	+21.0%	+21.0%	+21.0%
March 2024	+5.5%	+5.5%	+5.5%	+5.5%
April 2024	+4.1%	+4.1%	+4.1%	+4.1%
May 2024	-2.5%	-2.5%	-2.5%	-2.5%
June 2024	-15.2%	-15.2%	-15.2%	-15.2%
July 2024	-12.8%	-12.8%	-12.8%	-12.8%
August 2024	-17.6%	-17.6%	-17.6%	-17.6%
September 2024	-17.6%	-17.6%	-17.6%	-17.6%
October 2024	-15.3%	-15.3%	-15.3%	-15.3%
November 2024	-7.7%	-9.1%	-11.1%	-13.4%
December 2024	-11.2%	-16.6%	-20.9%	-24.8%

West Maui Total Room Nights Booked and Consumed

As of November 24, 2024 CY vs 2022

Month	November 24, 2024	November 17, 2024	November 10, 2024	November 3, 2024
January 2024	+48.8%	+48.8%	+48.8%	+48.8%
February 2024	+42.9%	+42.9%	+42.9%	+42.9%
March 2024	+15.5%	+15.5%	+15.5%	+15.5%
April 2024	+2.9%	+2.9%	+2.9%	+2.9%
May 2024	+2.1%	+2.1%	+2.1%	+2.1%
June 2024	-20.8%	-20.8%	-20.8%	-20.8%
July 2024	-23.5%	-23.5%	-23.5%	-23.5%
August 2024	-31.1%	-31.1%	-31.1%	-31.1%
September 2024	-29.0%	-29.0%	-29.0%	-29.0%
October 2024	-27.9%	-27.9%	-27.9%	-27.9%
November 2024	-18.2%	-19.3%	-20.7%	-22.4%
December 2024	-21.6%	-26.4%	-29.9%	-33.6%

Budget – Maui Recovery #3

Mid-October through mid-November 2024

Consumer Direct		\$ 100,000
	Total:	\$ 100,000

Plan Overview

- Partnership Program to drive qualified consumer traffic to the Hawai'i Special Offers landing page.
 - Maui was the featured lead in the statewide promotion.
- 150 different industry partners participated representing 171 vetted offers.
 - 43 Maui partners participated with 49 individual Maui offers.
- Targeted top Hawai'i West Coast markets beyond Los Angeles
 - San Francisco/Bay Area
 - Seattle/Pacific Northwest

2024 Targets/Results

MRP #3 – Mid-October to Mid-November

- Pre-plan Estimated KPI
 - 25,868,537 Impressions (estimated on industry average)
- Post-plan Delivered KPI
 - 31,027,446 Impressions (actualized)
 - 0.56% CTR
- Expansion of Hawai'i Special Offers Partner Program to targeted West Coast consumers

LOCATION	IMPRESSIONS
SF/Bay Area	20,389,604
Seattle/PNW	10,637,842
TOTAL	31,027,446

A close-up photograph of a green leaf, showing the intricate network of veins. The veins are a vibrant green color, contrasting with the darker green of the leaf's surface. The veins are arranged in a clear, repeating pattern, with a central midrib and secondary veins branching off at regular intervals. The texture of the leaf appears slightly waxy and smooth.

Mahala