



**KA HĀLĀWAI KŪMAU A KE KŌMIKE ALOWELO
KE'ENA KULEANA HO'OKIPA O HAWAII**

**BRANDING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY**

**HĀLĀWAI KELEKA'A'IKE
VIRTUAL MEETING**

Pō'akahī, 21 'Apelila 2025, 1:30 p.m.
Monday, April 21, 2025 at 1:30 p.m.

E ho'olele 'iwa 'ia ka hālāwai ma o ka Zoom. Meeting will be live streaming via Zoom.

<https://us06web.zoom.us/j/87104741963>

E noi 'ia paha 'oe e kāinoa me kou inoa a leka uila paha. E 'olu'olu, e ho'okomo i kou inoa piha akā hiki nō iā 'oe ke ho'ohana i ka inoa kapakapa e like me kou makemake.

You may be asked to enter your name or email. The Board requests that you enter your full name, but you may use a pseudonym or other identifier if you wish to remain anonymous.

Kelepona / Call In: 16694449171
Helu Hālāwai / Webinar ID: 871 0474 1963

Hiki i ka lehulehu ke hō'ike mana'o ma o ka palapala a i 'ole ma o ka waha. E kau palena 'ia ka hō'ike mana'o waha (ma ke kino a i 'ole ma o ka Zoom) he 'elima minuke ka lō'ihī no kēlā me kēia kumuhana. E kāinoa no ka hō'ike mana'o waha ma ke pākaukau ho'okipa ma ka lumi hālāwai. E kāinoa no ka hō'ike mana'o waha ma o ka Zoom ma o ke pihi "Q&A."

Members of the public may provide written or oral testimony on agenda items. Oral testimony (in-person or via Zoom) will be limited to five minutes for each testifier per agenda item. Signup for oral testimony via Zoom will be accepted through the Q&A feature on Zoom.

E ho'ohui 'ia nā palapala hō'ike mana'o i hiki ma ka pū'olo hālāwai. E leka uila 'ia nā palapala iā Carole Hagihara-Loo ma carole@gohta.net, a i 'ole, e lawe kino 'ia i ke ke'ena. No nā palapala hō'ike mana'o i hō'ea mai ma hope o ka pa'a o ka pū'olo hālāwai ('elua lā ma mua o ka hālāwai), e kāka'ahi 'ia nā kope i ke kōmike a e mākaukau no ka 'ike 'ia e ke anaina ma ka hālāwai.

Written testimony received ahead of the preparation of the committee packet will be included in the packet. Email written testimony to Carole Hagihara-Loo at Carole@gohta.net or hand-deliver or send via postal mail to the Hawaii'i Tourism Authority office, 1801 Kalākaua Avenue, 1st Floor, Honolulu, HI 96815. Written testimony received after the issuance of the committee packet (two business days prior to the meeting) will be distributed to the committee and available for public inspection at the meeting.

PAPA KUMUMANA'O
AGENDA

1. *Ho'omaka a Wehena*
Call to Order and Opening Protocol
2. *Kikolā*
Roll Call to Announce Name of Participating Board Members and to Identify Who Else is Present with Board Member if Location is Nonpublic
3. *'Āpono Mo'olelo Hālawai*
Approval of Minutes of the March 17, 2025, Branding Standing Committee Meeting
4. *Hō'ike A/A I 'Ole Kūkā No Kā HTA Papa Hana Hokona 2026 ****
Presentation and/or Discussion on the 2026 HTA Marketing Plan ***
5. *Hō'ike I Ka Anamana'o Iāpana*
Update on the Japan Affluent Market Study
6. *Hō'ike I Nā Hana Hokona 'Amelika 2025*
Update on the U.S. Maui Emergency Marketing Campaign
7. *Hō'ike A/A I 'Ole Kūkā No Ka 'Oihana Hālawai a Palapala Holomua*
Presentation and/or Discussion Regarding an Update on the Meetings, Conventions and Incentives Market Activity and Pace Report
8. *Ho'oku'u*
Adjournment

*** *'Aha Ho'okō: Ua hiki i ka Papa Alaka'i ke mālama i kekahi hālawai kūhelu i kū i ka Hawai'i Revised Statutes (HRS) § 92-4. E mālama 'ia kēia hālawai kūhelu nei ma lalo o ka § 92-5 (a)(4), § 92-5 (a)(8) and §201B-4(a)(2) no ka pono o ko ka Papa Alaka'i kūkā a ho'oholo 'ana i nā nīnūnē a nīnau i pili i ko ka Papa Alaka'i kuleana me ko ka Papa Alaka'i loio. He hālawai kūhelu kēia i 'ole paulele 'ia ka 'ikepili a i mea ho'i e mālama kūpono ai i ko Hawai'i 'ano, he wahi i kipa mau 'ia e nā malihini.*

*** **Executive Session:** The Board may conduct an executive session closed to the public pursuant to Hawai'i Revised Statutes (HRS) § 92-4. The executive session will be conducted pursuant to HRS § 92-5 (a) (2), § 92-5 (a)(4), § 92-5 (a)(8) and §201B-4(a)(2) for the purpose of consulting with the board's attorney on questions and issues pertaining to the board's powers, duties, privileges, immunities, and liabilities; to consider hiring and evaluation of officers or employees, where consideration of matters affecting privacy will be involved; and to discuss information that must be kept confidential to protect Hawai'i's competitive advantage as a visitor destination.

Inā he lawelawe a mea like paha e pono ai ke kīnānā, e ho'oka'a'ike aku me Carole Hagihara-Loo ma (808)-973-2289 a ma ka leka uila e like me ka wikiwiki i hiki, 'a'ole ho'i a ma 'ō aku o ka 'ehā lā ma mua o ka hālāwai. Inā 'ike 'ia he noi i ka lā ma mua o ka hālāwai, e ho'ā'o mākou e 'imi i ka lawelawe a mea like paha, 'a'ole na'e ho'i e hiki ke ho'ohiki 'ia ke kō o ua noi lā. Ua noa pū kēia ho'olaha ma nā kino 'oko'a e like me ka mea pono.

If you need an auxiliary aid/service or other accommodation due to a disability, contact Carole Hagihara-Loo at (808) 973-2289 or carole@gohta.net as soon as possible, preferably no later than 4 days prior to the meeting. **Requests made as early as possible have a greater likelihood of being fulfilled.** Upon request, this notice is available in alternative/**accessible** formats.

E like nō me ka 'ōlelo o ke Kānāwai Hawai'i i ho'oholo 'ia māhele 92-32.7, e mālama ana ke Ke'ena Kuleana Ho'okipa o Hawai'i i kekahi wahi e hiki ai ka po'e o ka lehulehu ke noho a komo pū ma nā hālāwai ma o ka ho'ohana 'ana i ka 'enehana pāpaho (ICT). Aia ana kēia 'enehana pāpaho ma ka papahelu mua o ka lumi ho'okipa i mua o ke Ke'ena Kuleana Ho'okipa o Hawai'i ma ka Hale 'Aha. 'O 1801 Kalākaua Avenue, Honolulu, Hawai'i, 96815 ka helu wahi.

In accordance with HRS section 92-3.7, the Hawai'i Tourism Authority will establish a remote viewing area for members of the public and board members to view and participate in meetings held using interactive conference technology (ICT). The ICT audiovisual connection will be located on the 1st Floor in the Lobby area fronting the Hawaii Tourism Authority at the Hawai'i Convention Center at 1801 Kalākaua Avenue, Honolulu, Hawai'i, 96815.

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**Approval of Minutes of the
March 17, 2025
Branding Standing Committee Meeting**



**BRANDING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY
Wednesday, March 17, 2025, at 1:30 p.m.**

Virtual Meeting

MINUTES OF THE BRANDING STANDING COMMITTEE MEETING

MEMBERS PRESENT:	Roy Pfund (Chair), Kimberly Agas (Vice Chair), Mufi Hannemann, Lisa Paulson
MEMBERS NOT PRESENT:	David Arakawa, Chris West
HTA STAFF PRESENT:	Daniel Nāho'opi'i, Kalani Ka'anā'anā, Isaac Choy, Caroline Anderson, Jadie Goo, Jennifer Bastiaanse
GUESTS:	Gina Chun, Jeffrey Eslinger, Lei-Ann Field, Darlene Morikawa, Tom Mullen, Aaron Salā
LEGAL COUNSEL:	John Cole

1. Call to Order and Opening Protocol

Ms. Goo called the meeting to order at 1:39 p.m. Mr. Nāho'opi'i did the opening protocol.

2. Roll Call to Announce Name of Participating Board Members and to Identify Who Else is Present with Board Member if Location is Nonpublic

Ms. Goo did the roll call, and members were confirmed in attendance by themselves, except for Mr. Arakawa and Mr. West, who were excused.

3. Approval of Minutes of the February 19, 2025, Branding Standing Committee Meeting

Chair Pfund moved to approve the minutes, and Ms. Paulson seconded it. Ms. Goo did the roll call, and the motion passed unanimously.

4. Discussion and/or Action on the Selection of a Vice Chair for the Branding Standing Committee

Chair Pfund reported that the current Vice Chair Agas was relinquishing her position and nominated Ms. Paulson to be the Vice Chair. Mr. Hannemann seconded the motion, and the motion passed unanimously. Chair Pfund will bring this recommendation to the full Board for its approval. Ms. Paulson thanked them for the opportunity to serve as Vice Chair and wanted to contribute to the Board of the HTA.

5. Update on the U.S. Maui Emergency Marketing Campaign ***

Ms. Anderson summarized the discussions at the February 27, 2025, BOD meeting: the BOD approved the \$6.3 million for HTUSA to develop and implement a U.S. Maui Emergency Marketing Campaign, which aligns with the Governor's intent to address the Maui Recovery. The budget breakdown is as follows:

\$4 million for the Wholesaler Programs;
\$500,000 for Other Direct Booking Programs;
\$800,000 for Brand Efforts for Maui Recovery;
\$1 million for Admin Fee and Brand Study.

The HTA staff has been working with the HVCB, and Mr. Nāho'opi'i has submitted the revised proposal to the DBEDT Dir. Tokioka on March 1, 2025, and another revised one on March 5, 2025. Dir. Tokioka advised Mr. Nāho'opi'i to move ahead to draft the contract on March 7, 2025. The HTA program staff submitted their internal documents for contracting on March 12, 2025. Mr. Nāho'opi'i added that Dir. Tokioka notified the HTA to put a hold on the contracting process on March 14, 2025. Ms. Anderson asked the committee to move to the Executive Session for discussion.

AG Cole said that the committee will enter the Executive Session Pursuant to HRS §201B-4(a) to discuss information that must be kept confidential to protect Hawai'i's competitive advantage as a visitor destination. Mr. Arakawa made a motion to enter the Executive Session, Vice Chair Agas seconded it, and the motion passed unanimously.

The committee member entered the Executive Session at 1:50 p.m.

6. Presentation and/or Discussion on the 2026 HTA Marketing Plan

The committee members returned from the Executive Session at 2:58 p.m.

Mr. Nāho'opi'i said they are currently in the March process, talking about things they learned from the Spring Tourism Update Week. They are trying to put together a marketing plan and guidelines to present to all the marketing contractors, including the leisure marketing partners

and the international MCIs. They want to put in place what they do for the support in the island visitors bureau. It is the marketing plan for the calendar year 2026.

They will have more details when they get to the next meeting in April. It should guide each of the GMTs on what they are looking for and set some targets and operations they will discuss. During May and June, the Board approves the final budget distribution, which will be each program line item, etc. That will be after they receive money from appropriations from the legislature. For the brand marketing plan, they are trying to identify when the Board needs to allocate the final budget or certain programs that are related to marketing. The marketing plan will guide that. When the GMTs submit their final work plans in the fall, the marketing plan will guide how their specific implementation plans will happen. Their overall guide to the marketing plan targets high-value, mindful travelers. Since pre-pandemic times, there has been a push towards higher value mindful travelers who are willing to spend more, be more active, and be conscious of some of the impacts they bring about when they visit Hawai'i. It is important that on the brand and marketing side, they contribute to supporting the shift to regenerative tourism, promoting the programs, and working with wholesalers and tour operators to help develop new regenerative tourism programs, as it is both a supply and demand side of things. They cannot attract regenerative tourism visitors if they do not have regenerative tourism products. It is both destination stewardship and destination marketing.

Mr. Nāho'opi'i showed a sense of how the markets are distributed in terms of their total visitor spending. It is dominated heavily by the U.S. in 2024. In 2019, there was more contribution from Japan and other international markets, such as Oceania, Korea, China, etc. They had a much stronger contribution to the overall total expenditures. Looking at the budget they proposed to the legislature through the Governor's appropriation of \$17 million does not include the extra \$6 million recently added. He showed how they distributed additional funding to the U.S. and Japan. China also requested an increase. They want to do more marketing campaigns at the \$550,000 level. They still need to work on Maui recovery from the U.S. and Canada. The international markets still have not recovered. They need to find out how to build that back in the next year. More tactical measures might have to have happen in the year for the international markets. They continue to increase demand for sustainable, regenerative energy in the next five years. They are trying to move the type of visitors and do regenerative, sustainable tourism which would then support those products in market. There is competition from all destinations because of the strong dollar but competitors are pushing the cultural and sustainable tourism ideas that Hawai'i has been promoting for many years now. There is a continued shift from exclusive, authentic and sustainable travelers. It takes work and additional funding to continue that process. Target audiences should not be any different. They continue to seek affluent travelers, high net worth or high spending, and cultural enthusiasts. Hawaiian heritage, historical nature, and local engagement appeal to them. They have been looking for

mindful, understanding communities. They must roll in the meetings segment, which is part of romance. Studies show that romance travelers are a good target audience because they spend high and do multiple activities on multiple islands. Active travelers are doing more, getting out into the community and taking advantage of the various products, increasing their expenditures. Their goal is high-value travelers to spend more.

He spoke about overall strategies, guidelines, and some tactical measures that they will include in their marketing plan. He wants to hear from the Board if they left out anything. He wants input about higher priorities versus lower priorities. They are grouped into three category areas, which are generally not in priority order. First are strategies to strengthen or elevate their brand and highlight what Hawai'i is as a travel/visitor destination. So, continuing the strategy to strengthen the brand recognition through establishing a premier leisure and business destination. They are not a discount or low-cost destination.

Next, we will continue to differentiate Hawai'i from other competitive destinations. It is the native Hawaiian cultural values, native cultural history, and multiethnic experiences that can be had when visiting. After that is the stewardship opportunities. They are a mature market with great infrastructure and can offer quality experiences, particularly in the destination stewardship area and sustainable tourism. Being purposeful is next, targeting those responsible tourists and providing them with regenerative experiences. They have to serve up those regenerative experiences. Total spending is driven by lodging costs and some food and spending costs but not shopping.

The overall comparisons between pre-pandemic and the retail sector are lower than they were in 2019, and activities and tourists have lower spending. Some of it has to do with the geographic markets they target. In the past, that was typically driven by international visitors, e.g., to Japan, Oceania, and Korea, for retail and many other activities. So, even though the Japan segment is not a high spender, it is a distributed spender. For market visitation, geographic distribution helps them level out the risk. They need to work on stabilizing the U.S. and Canada because they are the closest and strongest market. They need to start recovering that international and multi-island visitation. This helps support inter island airfare as well as tour operations. In the future, they need to think about developing the next market. They have identified that Taiwan would be the next one to work on. That will be in the marketing plan for the year.

Mr. Arakawa asked where the marketing for sun, surf, and sea is.

Mr. Nāho'opī'i said he would show that in the guidelines.

Mr. Arakawa said their strategy is not to market their weather, sun, and surf; it is part of their guidelines.

Mr. Nāho'opi'i confirmed that as correct. He said the strategy is to strengthen their brand recognition compared to other competitive destinations, that there is more awareness of them as a travel destination, and that it appeals to the target segments that they are looking at.

Mr. Arakawa asked if Mr. Nāho'opi'i thought that was not important. He is shocked that Japan has already pivoted, and they had not even mentioned it. He asked where Japan falls under.

Mr. Nāho'opi'i said Japan is under diversified spending opportunities such as through sustained Japan expenditures, particularly retail activities.

Mr. Arakawa said they may need something for the shoulder season. Mr. Nāho'opi'i said it comes up later. Mr. Arakawa suggested putting it in their overall strategy because when the hotels complain about low bookings every May or April, they should be ready to hustle around. Mr. Nāho'opi'i said the shoulder season is approached through multiple strategies which are in their guidelines. Mr. Arakawa said they would not have had to do the fall activation if it was in their guidelines. Mr. Nāho'opi'i said the activation happened in the shoulder season, but it was to address the winter period.

Chair Pfund said that rather than being argumentative, they need to make constructive comments.

Mr. Arakawa said he was not being argumentative. He wants to ensure they do not repeat the mistakes they made in the past and avoid the scrambling they made in the past.

Mr. Nāho'opi'i spoke about some guidelines, first on the messaging itself. The general one is always people, place, and culture. The current campaign reflected the people, the place, and the Hawaiian Islands. They will continue to emphasize that in all of their brand messaging. They feature people and their stories. They talk about the place, the natural environment, the weather, the ocean, and natural beauty. An important element is culture. There are three components in the destination.

Sustainable destination which has been very appealing to much of the younger generations as well as those who are very environmentally conscious.

Beautiful scenery - They found that the scenery drives travel, but Hawai'i is also known as a scenic destination. They also found that an incremental increase in travel to Hawai'i or intention to visit comes about by showing new things to explore. The scenery drives people. They also feature social media and then volunteer and give-back opportunities.

He spoke about the guidelines. Guidelines mean things like marketing guidelines. They want to ensure all their marketing plans show that the contractors are staying up with current market trends, and the staff will evaluate their work plans accordingly. There is innovation every year. The brand is the Hawaiian Islands, meaning the entire state is marketed as a whole, but it also shows that each island has different opportunities and uniqueness. They are not only promoting one island in its entirety because they have had that problem before when they cannibalized between island visitations. So, they continue to promote Hawai'i, the Hawaiian Islands, as one destination with multiple facets. He asked that all of the work plans include crisis management and communication-related to the visitors in their work plan. Even though they are marketing contractors, there is a portion that they need to dedicate to crisis management and communications with visitors. Whenever they do any marketing, they feature the projects and programs that the HTA has been supporting. They are prioritizing driving visitor spend to the Hawai'i based businesses first and those community organizations putting out wonderful products to move them towards the regenerative tourism model.

The other guidelines include maintaining cultural integrity ensuring that what they produce is correct regarding Hawaiian language, customs, and practices. Their toolkit is to ensure authenticity. Nowadays visitors are seeking authenticity.

He spoke about continuing to work on the next round of mindful travelers. They must develop first-time and younger visitors, building them into long-term travelers. They must highlight what is new to see and do. Showcase the natural environment - the natural scenery etc, is important.

A component of the marketing will be to educate visitors who come from the destination stewardship branch before arrival. They have been determining the messaging for safe, secure, and appropriate travel while visiting. They must push it out before they arrive. Their marketing contractors and MCI are responsible for continuing to develop airline relationships and support route development. They had asked the legislature for additional funding for a route development specialist. There was a presentation by Bradley Ford.

All strategies must be data-driven with measurable initiatives. There must be performance monitoring along the way to ensure that they hit their benchmarks and milestones, and then once it is over, they can evaluate all the information.

He spoke about tactics. Continue marketing with multiple channels, particularly emphasizing digital and social content. Look at quality platforms.

There can be consumer events in some markets, e.g., Japan does a Hawai'i Expo and aligns with other existing consumer events from travel trade that include consumer events.

The travel trade side is important. Agent training is a critical component, and it has helped them put new information into the market and ensure that it is correct and accurate. It is important to ensure that they check on their alignment with the product. Creating the demand is important. In order to create demand, they have to have the product, and the supply. So where possible, they take on the opportunity to develop new products for the travel trade. It has been very effective. On the PR side, the people are important. One of the most important things that they have been emphasizing all these years and that aligns with the brand, the destination, and the culture is to have the stories of the residents who live in Hawai'i. At the same time, it is authentic because people see people telling stories they want to share. The last thing they will hold them accountable for is the measures of success. To measure brand health, they need to evaluate programs, recall, or hear about safe and responsible travel, which aligns with their messaging.

He spoke about destination familiarity. They measure whether people know various destinations in some surveys and research. They see how well they stack up against their competitive set. They monitor it daily, and it is published every month. They have the data available for the marketing contractors. The destination preference is the next step after that. They continue to monitor the average daily visitor spending. For the state as a whole, the overall economic impact they are doing this for is driven by total visitor expenditures.

Chair Pfund had a few questions. He asked if the message communicated was understood. He said the people and the place are the main branding messages. The measurements of the KPIs are way lower. He asked how they capture that additional spend.

Mr. Nāho'opī'i said that ancillary spending is captured at the end of every year. They do an additional survey with the meeting planners, the actual activities, and the events themselves. If they have entry spend on corporate events or corporate dinners that are outside of what is happening in the hotel, they capture an additional spend, but it is not an average daily. It is a very significant component. It hasn't been as much lately because they have had many smaller events, but the additional costs come in when they get to the big corporate ones.

Chair Pfund asked if they could collaborate more with the Kilohana side, where both sides can benefit. Mr. Nāho'opī'i said they also have the brand group meet with the stewardship group. Assets are shared, and they have access to the existing assets from the marketing side to integrate the driven messaging. They are still working on some of those processes in the new development. The messaging would be driven from the destination stewardship side on the safety appropriateness and then fed back to the marketing side to promote in the next round.

Ms. Anderson said the team was there when they had their internal brainstorm a few weeks back. They had gone through seven different topics with all the GMT and contractors there. They had broken out into groups for that collaboration. They can include them even more in the future.

Mr. Arakawa asked if they reached out to the Hawai'i Hotel Association and if it had provided any comments. Mr. Nāho'opi'i said that in the next round, they will start working with the stakeholders. Mr. Arakawa said the hotels mentioned that the HTA has not spoken to them, so he wants them to be included. Mr. Nāho'opi'i said it is part of their strategic planning process. Mr. Arakawa suggested they get together as a branding committee and look at a process instead of talking to them afterward to see if they have any comments and then present them to the Board. Mr. Nāho'opi'i said he would work with Chair Pfund on that. Some of the data that went into that was from an industry survey that they conducted, which included the major hotels and all their stakeholders. They have what they call partner meetings quarterly. Mr. Arakawa asked for copies of the data. Mr. Nāho'opi'i said that would be fine. Those would be from the major stakeholders, either salespeople or GMTs that entered their survey.

Chair Pfund said number one on the list is to get more dedicated marketing money.

Mr. Arakawa said this was taken away from them, and they need to gain trust to get this back.

There were no other comments.

7. Adjournment

The meeting adjourned at 3:44 p.m.

Respectfully submitted,



Sheillane Reyes
Recorder

4

**STAFF REPORT TO THE BOARD
2026 HTA Marketing Plan Development:
2026 Hawaii Tourism Brand Marketing Directives**



STAFF REPORT TO THE BOARD

April 21, 2025

REQUEST: To review HTA's next phase of the 2026 Marketing Plan Development: 2026 Hawai'i Tourism Brand Marketing Directives

FACTS:

The purpose of the 2026 Hawai'i Tourism Brand Marketing Directives is to provide strategic direction to HTA's global marketing contractors in developing their 2026 Annual Brand Marketing Plan (BMP). This document consists of the following sections:

- HTA's Brand Marketing Objectives
- Snapshot of the Industry
- Budget Allocation
- Guiding Principles
- Target Markets (Major Market Areas)
- Target Segments
- Core Focus Areas
- Tracking Our Success (Measures of Performance & KPIs)

In June, HTA will issue this document along with the board-approved market budget allocations to the global marketing contractors. Each contractor will then develop a BMP customized for their respective market.

In August, HTA will review and approve all BMPs, and compile relevant sections into a unified 2026 Tourism Marketing Plan, which will be shared publicly to inform stakeholders and support alignment across the industry.

DISCUSSION: To review and refine the draft 2026 Hawai'i Tourism Brand Marketing Directives.

BUDGET: Pending outcome of 2025 Legislature Session.

RECOMMENDATION: BSC approval of the draft 2026 Hawai'i Tourism Brand Marketing Directives.

5

Update on the Japan Affluent Market Study

An aerial photograph of a lush green golf course situated on a coastal ridge. The course features several green fairways, sand traps, and a clubhouse. To the right, the ocean is a vibrant turquoise color, with white waves crashing against the shore. In the distance, a large mountain range stretches across the horizon under a blue sky with scattered white clouds.

HAWAII TOURISM

JAPAN

**JAPAN MARKET
ADDITIONAL FUNDING INITIATIVE**



OBJECTIVE

- Increase expenditures by targeting affluent market
- Develop the database of affluent visitors
- Target affluent visitors to encourage Maui travel
- Program target during soft season
- Continue to develop value-added programs

TARGET



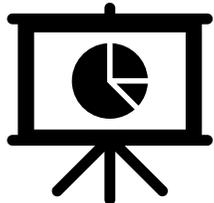
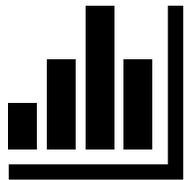
- Affluent individuals who have achieved a business milestone and now enjoy more leisure time
- Focuses on nurturing the younger generation
- Prioritize family time and their enjoyment over luxury
- Seek for unique activities with family

PROJECT IMPLEMENTATION FLOW

STEP 1

- Data collection
- Data analysis
- Clarification of target profile

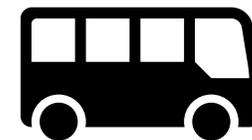
\$300,000



STEP 2

- Build framework
- Develop ad-value programs
- System development
- Executing promotions

Estimation TBD



STEP1 OVERVIEW

Period : September – December 2025

Contents : Pre-Project Research and Analysis

STEP1-1 Data Strategy

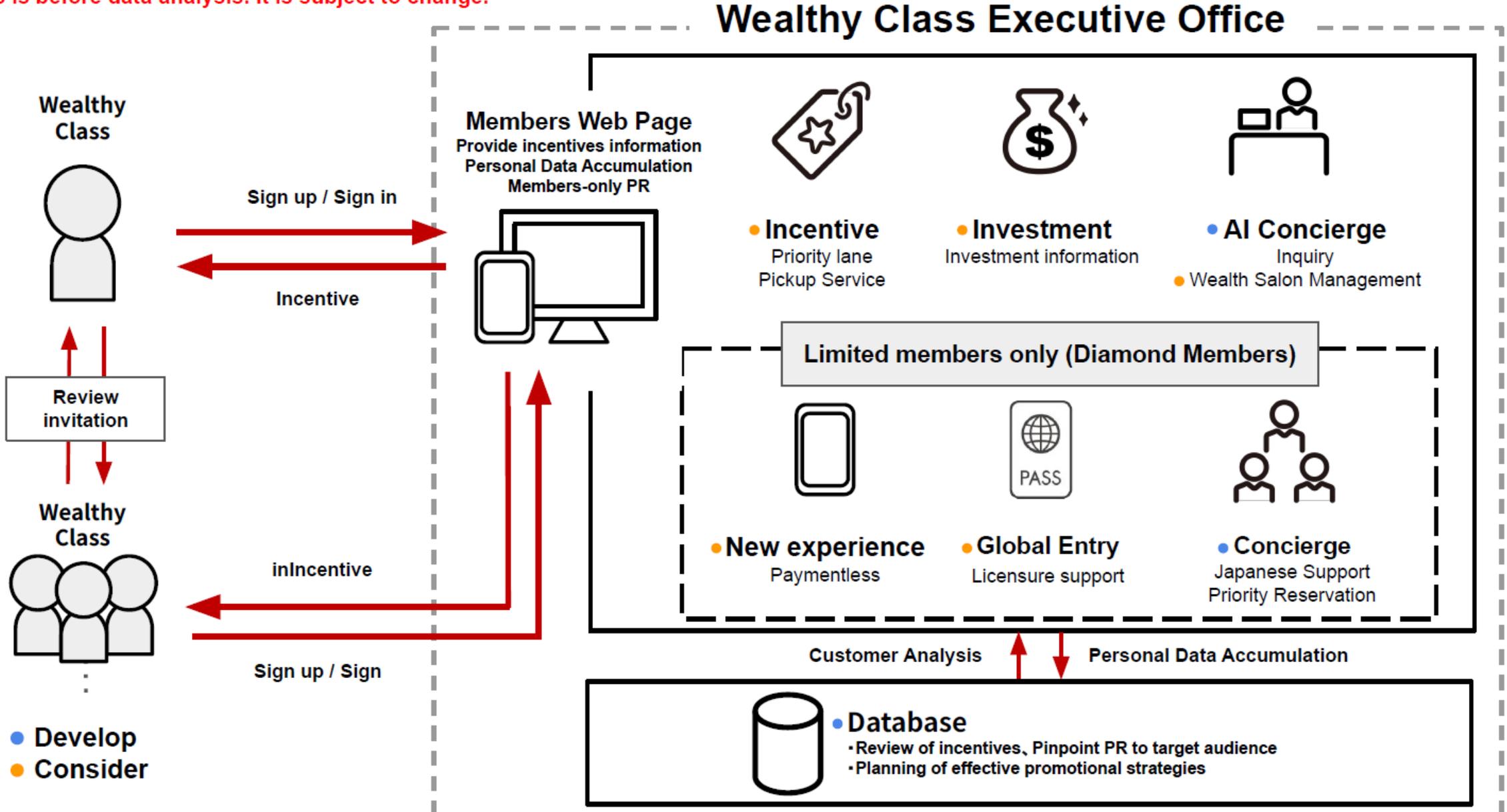
- Data Collection on Wealthy Class
 - Secondary Research
 - Data Acquisition from Information Providers
- Data Analysis
 - Refining Profiles of Wealthy Class Travelers
 - Targeting
 - Ideation for Incentives and Investment Opportunities

STEP1-2 Partner Strategy

- Assessment of Areas Requiring Collaboration
 - Data analysis leads to overall measures.
 - Identification of Potential Partner Companies for Each Collaboration Area
- Selection of Administrative Office management partners
 - Selection of Potential Partner Companies
 - Creation of RFP

DIGITAL PLATFORMS

This is before data analysis. It is subject to change.

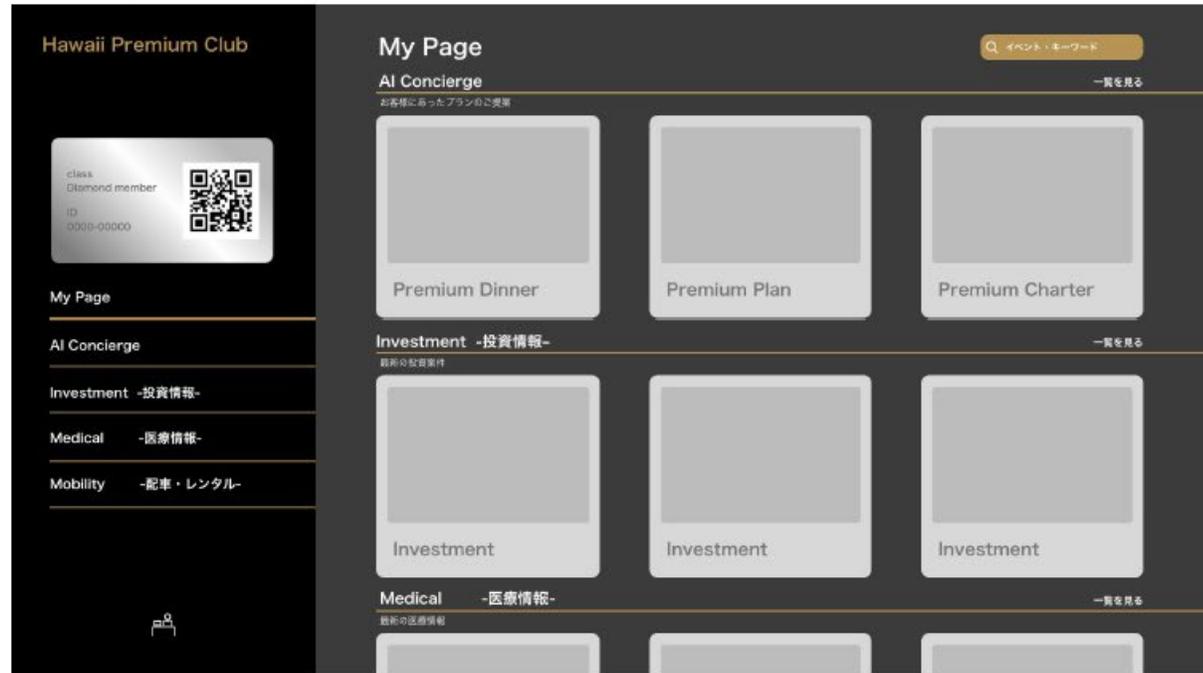


DIGITAL PLATFORM

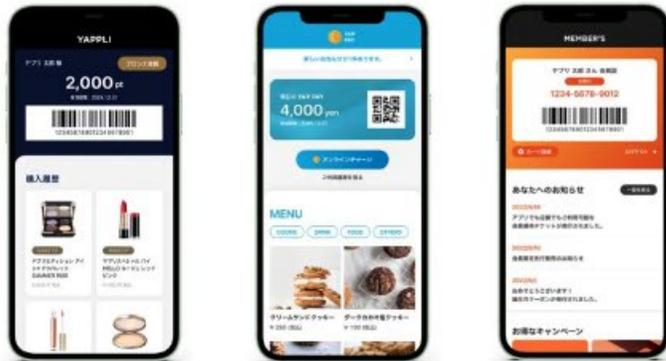
SP Version



WEB Version



Reference



IDEAS OF ATTRACTING TRAVELERS



Events for Attracting Wealthy Class Travelers

Objective: Attracting and Analyzing Wealthy Travelers

The following are preliminary ideas:

- **Events Originating in Hawai'i**
Develop new programs and events based on Hawai'i's traditions and folklore.
- **Aloha Stadium Events**
Plan events featuring prominent figures, such as baseball star Shohei Ohtani
- **Exclusive Annual Event**
Host a special event once a year exclusively for members



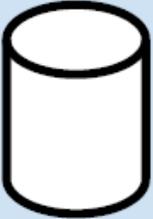
Incentives for Members

- Priority access to the app
- Access to priority lanes and shuttle services
- Exclusive Visa program offerings
- Payment-free experiences
- Priority reservation rights for various activities
- Invitations to members-only tours and salons
- Japanese-speaking concierge desk
- VIP-exclusive night lounge



Introduction to Investment and Experience Opportunities

- Introduction to priority investment opportunities
- Real estate investment linked to residency visa issuance
- Improvements to investment visa options
- Public facility contributions and special privileges
- Business startup support and special benefits
- Sustainability investments
- Shared jet services
- Study abroad and education-related opportunities



Database of Wealthy Class Travelers

- Strengthening incentives
- Targeted PR for specific audiences
- Developing effective promotional strategies
- Creating personalized services (storing customer information)
- Personalized experiences and recommendations

HAWAII TOURISM

JAPAN

MAHALO



6

STAFF REPORT TO THE BOARD Update on the U.S. Maui Emergency Marketing Campaign



STAFF REPORT TO THE BOARD

March 27, 2025

REQUEST: To provide an update on the U.S. Maui Emergency Marketing Campaign.

FACTS:

1. February 27, 2025: Hawaii Tourism Authority’s (HTA) Board of Directors approved \$6.3 million for HTUSA to develop and implement a U.S. Maui Emergency Marketing Campaign that is in alignment with the Governor’s intent to address Maui’s recovery as follows:

Component	Budget Allocation
1. Wholesaler Program	\$4,000,000
2. Other Direct Booking Programs	\$500,000
3. Brand Efforts for Maui Recovery	\$800,000
4. Admin Fee + Brand Study	\$1,000,000
Total	\$6,300,000

2. February 27, 2025: HTUSA was directed to submit a revised proposal with a budget allocation in alignment with the HTA board motion. The proposal would then be provided to the DBEDT Director for Governor’s approval.
3. March 1, 2025: Interim President & CEO, Daniel Nahoopii, submitted the revised proposal to DBEDT Director Jimmy Tokioka. March 5, a revised version with more details on the HVCB administrative activities was provided.
4. March 7, 2025: DBEDT Director Jimmy Tokioka advised Mr. Nahoopii to move ahead with drafting the contract.
5. March 12, 2025: As of March 12, 2025, program staff has submitted all internal documents and a draft contract to the procurement team.
6. March 27, 2025: The board amended its previous motion of approving \$6.3 million for a U.S. Maui Emergency Marketing Campaign to take into account \$300,000 to be moved towards the Japan market recovery. As such, the U.S. Maui Emergency Marketing Campaign budget is as follows:

Component	Budget Allocation
1. Wholesaler Program	\$4,000,000
2. Other Direct Booking Programs	\$200,000
3. Brand Efforts for Maui Recovery	\$800,000
4. Admin Fee + Brand Study	\$1,000,000
Total	\$6,000,000

7. April 16, 2025: HTA is awaiting final approval from the Department of Budget & Finance to transfer and reallocate funds into BED114. This approval is needed before the contract agreement can be executed.

BUDGET IMPLICATIONS: This project will be funded by \$6.3 million from the restricted funds released by Governor Green on January 31, 2025. Emergency Procurement is being used per Governor Green’s Emergency Proclamation No. 20 Relating to Wildfires.

7

Presentation and/or Discussion Regarding an Update on the Meetings, Conventions and Incentives Market Activity and Pace Report



**Hawai'i Tourism Authority
Branding Standing Committee Meeting
MCI Update**

April 21, 2025



Agenda

- Meet Hawai'i: MCI Overview
- Strategic Landscape
- Resetting Strategy
- Major Initiatives



Meet Hawai'i: MCI Overview

- Our Role on Behalf of the State
- Team Structure: Citywide, Single Property, Client Services
- Key Definitions: Booking Cycle, Pace, Goals Benchmarks

Meet Hawai'i

*Meet Hawai'i is a collaboration between Hawai'i Visitors & Convention Bureau (HVCB) and the Hawai'i Convention Center (HCC) to **attract and contract Meetings, Conventions, and Incentive (MCI) business to the state of Hawai'i***

HVCB – MCI Global Sales & Marketing for State of Hawai'i

- **Contracts offshore conventions at HCC**
 - Outside of 13 months of arrival
 - 2+ hotels; significant hotel room nights
- **Contracts hotel meetings** on all islands
- **Services and connects** groups to all partners in the destination

HCC – Local sales & Operations

- Contracts **local groups** within 13 months of arrival
- Includes festivals, marathons, sports groups
- **Services and connects** groups to resources inside the building i.e., F&B, Audio Visual, Telecom, etc.



Center Operations,
Local Sales &
Community Events



City-wide Events and
Single Property
Meetings

Global Meet Hawai'i Teams

Driving visitor spending to the state



Single Property Team

- **Focus:** Contract self-contained group business with 10 or more rooms on a peak night at any MCI Hawai'i hotel, on all islands.
- **KPIs:** Tentative and Contracted total room nights

Citywide Sales Team

- **Focus:** Contract groups 1K+ attendees, involving 2 or more hotels and the Hawai'i Convention Center (HCC). 13 months out; offshore
- **KPIs:** Tentative and contracted total room nights, # of events.

Global Sales Team

- Handles both Citywide and Single Property business and are deployed in Japan, Oceania, and Korea. Coverage is across Asia Pacific.

Client Services Team

- **Focus:**
 - Assist contracted clients in developing their program in Hawai'i.
 - Connects clients with vendors and to the community via cultural education and resources.
 - Pre-promotion: Attendance building & PR.
- **KPIs:** Create an experience that turns new business into repeat customers.

Key Definitions

Booking or Event Cycle:

- **Definition:** Timeline between initial client engagement and event execution (Lead Date to Definite Date)
- Citywide conventions: 3–5 years out
- Single property groups: 6–18 months out

Pace: (Future Pace)

- **Definition:** Real-time tracking of room nights and # of events booked for future years
- Indicates whether sales are ahead or behind targets based on past year averages.

Establishing Pace Targets/Benchmarks: (Future Arrival Years)

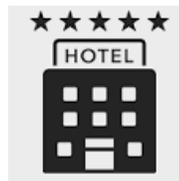
- **Definition:** Historical averages
- Example: Where should we be today for 2028, 2029, 2030...
- Helps evaluate pipeline health (tentatives) and future year bookings
- **Targets are guideposts** of where the team should be to achieve TRN and # of events in the arrival year.

Production Goals:

- **Definition:** room night and # of event produced in the year for future years. (tentative and definite)

MCI = ECONOMIC IMPACT TO HAWAII

Meet Hawai'i Generates Nearly Half of Total Meeting Attendee Expenditures in the State with an Annual Event Economic Impact (EEI) of \$572.5M



2023 Hawai'i Statistics	Meetings	Conventions	Incentive Meetings	Total
Visitors	20%	53%	27%	401,208
Total Length of Stay	7.6	8.1	7.4	7.6 avg
Per Person Per Day	\$325.8	\$286.4	\$302.8	\$305 avg
Total Spending	21%	58%	21%	\$1,041B

Total Expenditures includes additional expenditures spent in Hawai'i on conventions and corporate meetings by out-of-state visitors (i.e., costs on space, equipment rentals, transportation, etc.)

A scenic landscape featuring a vibrant rainbow arching over a dense, forested valley. In the foreground, there is a field of tall, green grasses. The sky is a soft, hazy blue, and the overall atmosphere is serene and natural.

Strategic Landscape

- 2024 Production Highlights
- Booking Cycle Differences (Citywide vs. Single Property)
- Shaping Strategy in a Changing Landscape

Production Highlights – CY 2024

	Total Room Nights	% to YTD Goal
CITYWIDE		
Tentatives	514,508	114%
Definites	149,584	90%
# of Events	22	Goal: 28
SINGLE PROPERTY		
Tentatives	593,902	95%
Definites	177,624	85%

Highlights

- The Citywide sales team was 114% of their tentative goal. Our new sellers hit the ground running. Together our teams were **103% percent of goal** in this area.
- Definite bookings were down by only 10 percent despite not having a fully staffed team until June. An important achievement, the team **outpaced 2019 in contracted room nights by 10 percent**.
- Booking Pace: By year-end, single property sales are aligned for **2025 and 2026 on pace** with target pacing, while the **citywide team brought 2028 on track**.

Top of mind:

- Incentive Campaign to drive hotel rooms to 2026
- HCC Benchmark Strategy

Hawai'i Single Property vs. Citywide Booking Trends

Single Property (Hotel-Only Bookings)

Booking Window: Typically, 6 to 18 months from lead to arrival

Trend: Short and increasingly compressed; many bookings are **in-the-year-for-the-year (ITYFTY)**

Drivers: Corporate incentives, **smaller** association meetings, and short-term bookings

Flexibility: High; hotels can often shift space and rates quickly based on demand

Conversion Speed: Fast — planners often move to contract within weeks of sourcing

Citywide Bookings (Hawai'i Convention Center)

Booking Window: Typically, 2 to 5 years out, occasionally longer for major associations

Trend: Compressed post-pandemic; many 2027 bookings were secured in 2023-2024

Drivers: Association rotations, international meetings, corporate events

Flexibility: Lower due to space hold patterns and multi-partner coordination

Conversion Speed: Moderate to slow – depends on funding approval, space management and client board processes. While conversion speed can be slow, destination response times are key to maintain momentum and win the business

Booking Cycles – National Comparison

2synergize Reporting

- A specialized consulting agency focused on the destination marketing industry
- Categorizes DMOs (*Destination Marketing Organizations*) based on convention center size.
- Category C includes 48 destinations 100K-499K GSF of exhibit space
- Hawai'i Convention Center (204K GSF) falls into this mid-sized category
- While the destination comparison is defined by the convention center, the data includes both hotel and convention center leads for that category



Category C vs. Hawai'i (2024)

Industry Benchmark

- +12.8% increase in lead volume vs. 2019
- +22% increase in lead room nights vs. 2019
- Over 5,000 hotel leads, and 169 convention center leads were booked ITYFTY (*in the year, for the year*) or one year out
- Short-term booking cycle remained in 2024

Hawai'i Convention Center

- Most of our bookings for 2027 were sourced in 2023 and early 2024
- Nearly all tentative citywide leads were within 3–4 years of arrival
- Very few long-lead bookings (5–10 years out) in our historic pace pattern
- Our pace was ahead of industry benchmark for 2027 prior to disruption

Takeaway: Hawai'i's pace aligns with national Category C trends — shorter booking window, but with strong conversion and demand

Pivoting Strategy After 2027 Disruption

Tentative Business has Value

- Tentatives signal serious interest and allow us to forecast economic impact
- Each tentative group represents potential visitors spending, even before conversion
- Current combined tentatives represent \$1.8B in potential economic impact
- Conversion efforts are ongoing; disruption affects both stages of the sales funnel

2026 – 2027 Closure Disruption

- Closure extension removed a strong 2027 pipeline from conversion path
- 2027:
 - **Definites: (12 Events)**
 - \$339M Economic Impact
 - 60K Attendees | 103K TRN
 - \$262K HCC Rental
 - \$3M in committed F&B revenue
 - **Tentatives: (11 Events)**
 - \$343M Economic Impact
 - 54K Attendees | 76K TRN
- Preserving business by shifting to future dates or keeping in Hawai'i.
- Shifting strategy to leverage single property and short-term opportunities

Pressure from Other Destinations

- 95% of competitive destinations use incentives to close business
- Hawai'i's incentive fund reduced from \$1.2M pre-pandemic to \$500K today
- Additional support needed to compete in cost-driven MCI landscape

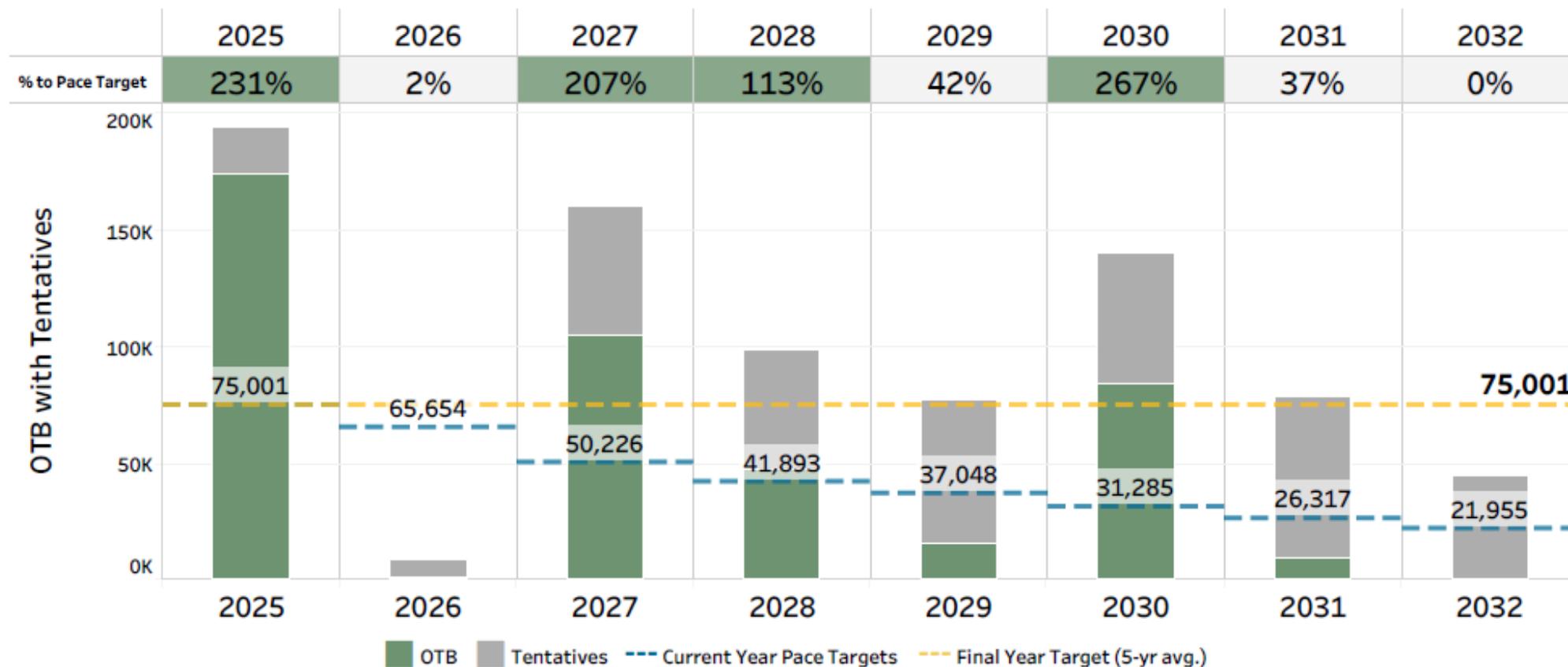


Resetting Strategy

- Current Pace
 - January 2, 2025 vs. April 1, 2025
 - Total Room Nights
 - Number of Events
- Production
- Maximizing All Teams to Maintain Momentum

Hawai'i 8 Year Future Pace for Citywide – Room Nights

Number of room nights on the books against a 5-year average target. (2017, 2018, 2019, 2022, 2023) Data last refreshed on 4/1/2025



Insight – Citywide pacing strong in 2028, drop off in 2026 reflects HCC closure. 2029 need year.

Event Booking Pace

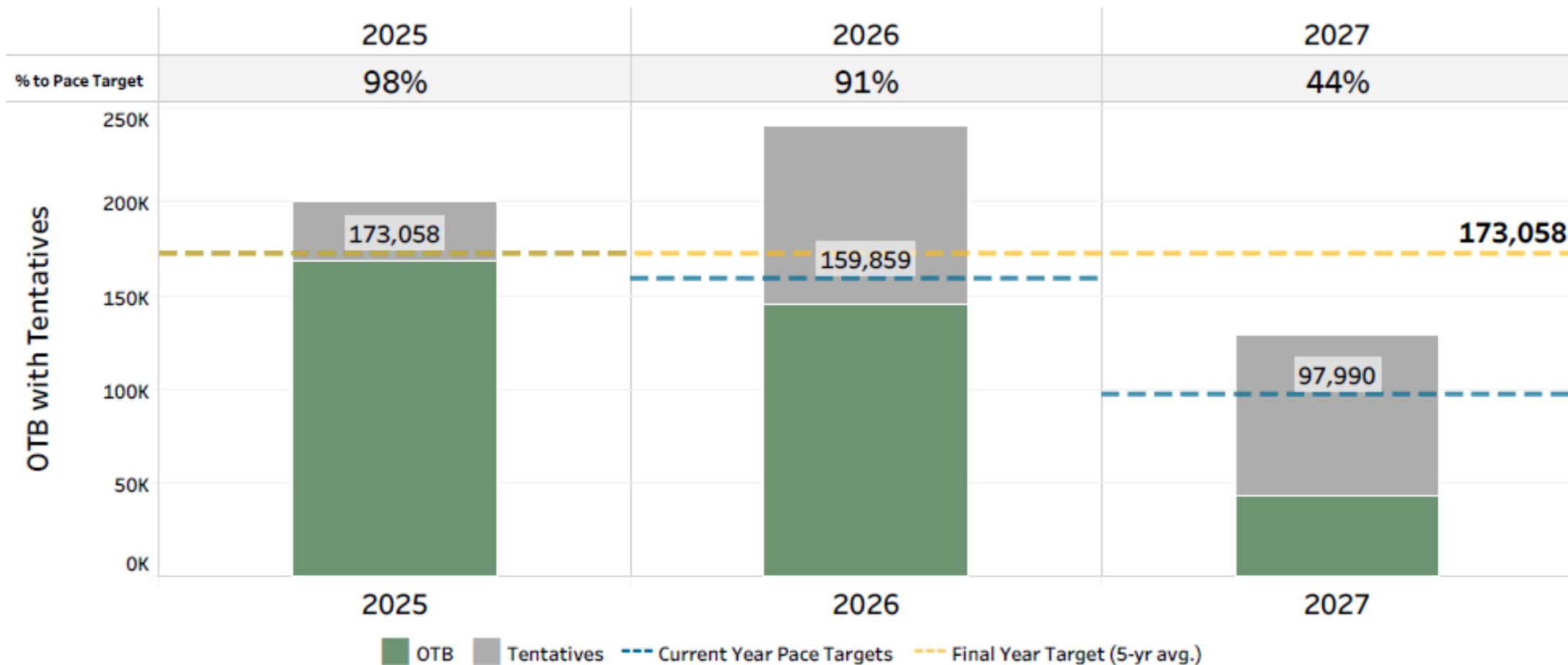
March 2025 YTD

Future Pace for Definite Bookings

	OTB Bookings	Pace Booking Target	Variance	% Variance	LTB	Tentative Bookings	Booking Pace Goal
2025	21	28	(7)	-25%	7	3	28
2026	1	14	(13)	-93%	27	2	28
2027	12	8	4	50%	16	7	28
2028	7	6	1	17%	21	11	28
2029	3	5	(2)	-40%	25	4	28
2030	5	4	1	25%	23	4	28
2031	1	3	(2)	-67%	27	5	28
2032	0	2	(2)	-100%	28	6	28

Hawai'i 8 Year Future Pace for Single Property

Number of room nights on the books against a 5-year average target. (2017, 2018, 2019, 2022, 2023) Data last refreshed on 4/1/2025



Insight – Single Property pacing remains on track for 2025. 2026 incentive launched in March. A 2027 campaign is under discussion to attract larger meetings and drive compression across the state.

Single Property Definite Production by Island

March 2025 YTD

	Tentative Rooms	Economic Impact	Definite Rooms	Economic Impact
Island of Hawai'i	82,278	\$134.1M	3,656	\$4.9M
Kaua'i	53,527	\$78.0M	7,085	\$8.3M
Lāna'i	14,504	\$23.8M	0	\$0.0M
Maui	124,243	\$197.3M	14,400	\$20.1M
O'ahu	154,285	\$304.7M	6,911	\$14.9M
Totals	428,837	\$433.2M	32,052	\$48.2M

Meet Hawai'i – Tentative Production (pipeline)

March 2025 YTD

	Attendees	Tentative Room Nights	Economic Impact
Citywide	104,700	172,788	\$654.8M
Single Property	67,940	179,453	\$331.2M
TOTALS	172,640	352,241	\$986.0M

Meet Hawai'i – Definite Production

March 2025 YTD

	Attendees	Definite Room Nights	Economic Impact
Citywide	2,200	826	\$12.9M
Single Property	9,130	25,426	\$41.8M
TOTALS	11,330	26,252	\$54.7M

Reset Strategy – Maximizing Our Teams

Citywide Team:

- Focused on rebooking impacted 2027 events into future years
- Protecting relationships with long-lead, high-impact clients
- Targeting 2028–2030 booking cycles
- Launching grassroots marketing campaign July 2025 when construction company is secured and day by day schedule in place

Single Property Team:

- Actively filling compression in 2026–2027 across all islands
- Capitalizing on short-term booking window flexibility
- Leveraging customized hotel incentives and relationships

Despite the disruption, our teams are aligned and focused – retaining business, rebuilding pace, and protecting long-term economic value for Hawai‘i

A landscape photograph featuring a vibrant rainbow arching over a dense, green forested mountain range. The foreground is filled with a field of tall, green, grass-like plants. The sky is a soft, hazy blue, and the overall scene is serene and natural.

Major Initiatives 2025

U.S. Citywide & Single Property

Major Programs:

- PCMA's - Convening Leaders - Houston
- Varied activations in key markets through MPI
- Northern California Roadshow
- Business Events Industry Week (DC)
- Sports Events and Tourism Association (Q2)
- IMEX America 2025, Las Vegas
- Citywide and Single Property Fam (Q3 & Q4)
- Site Classic 2025 – Maui

Key Strategies:

- 2026 Incentive to key intermediaries to offset closing of HCC
- HCC Benchmark Analysis
- Highlight Client Services and 'Elele Program



Global MCI - Japan

JTB Strategic MOU

- Develop long term partnership with JTB to attract large scale incentive citywide clients
- JTB Aloha Ambassador Program

HIS Strategic MOU

- Mālama programs
- Neighbor Island MCI Groups

JATA Sales Competition

- Nationwide sales competition to encourage sales personnel to sell Hawai'i to their clients.
- 1,150 Sales Personnel representing 7 Travel agents have signed up for the Competition
- Winners will win a free trip to Hawai'i sponsored by Meet Hawai'i and Hawai'i Hotel Partners.

HIS Corporate Seminar – Tokyo and Osaka

- In partnership with HIS and Hawai'i partners the seminars allows Meet Hawai'i and Hawai'i partners to have direct conversation with Corporate Clients.



Global MCI - Oceania

- DMS Connect Roadshow - Auckland, Melbourne & Sydney
- Associations Forum National Conference
- Meet Hawai'i 'Ohana Aloha Mission 2025 - Sydney, Melbourne & Auckland
- Meet Hawai'i Oceania FAM - O'ahu & Island of Hawai'i
- Global Business Travel Association
- Oceania Incentive Offer (Year-round)



WHY BLEISURE IS BOOMING IN HAWAII



Global MCI – Korea/China

- Korea Sales Mission
- Aloha MCI Workshop Korea
- Macau International Expo



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 regular, repeating pattern, creating a grid-like structure. The lighting is soft, highlighting the texture and depth of the leaf's structure.

Mahala