

# Hawai'i Tourism Authority Board of Directors Meeting

December 21, 2023



# Agenda



## 2024 Maui Economic Recovery

- Market Insights
- U.S. Marketing Program
  - 2023 Review
  - 2024 Plan Overview

# Market Insights

# Market Insights

Trans-pacific AIR SEAT SYNOPSIS forecasted by Country  
2024 Projections as of December 18, 2023

	# of SEATS Jan-June 2019	# of Seats Jan-June 2023	# of SEATS Jan-June 2024P	% Change 24/19	% Change 24/23
Australia	181,063	120,479	115,093	-36.4%	-4.5%
Canada	306,686	278,381	255,764	-16.6%	-8.1%
China	65,007			-100.0%	
Cook Islands		1,134	4,914		333.3%
Fiji	4,282	7,310	4,420	3.2%	-39.5%
French Polynesia	8,062	6,950	7,228	-10.3%	4.0%
Japan	981,290	456,408	761,303	-22.4%	66.8%
Kiribati	3,634	1,530	4,420	21.6%	188.9%

# Market Insights

Trans-pacific AIR SEAT SYNOPSIS forecasted by Country  
2024 Projections as of December 18, 2023

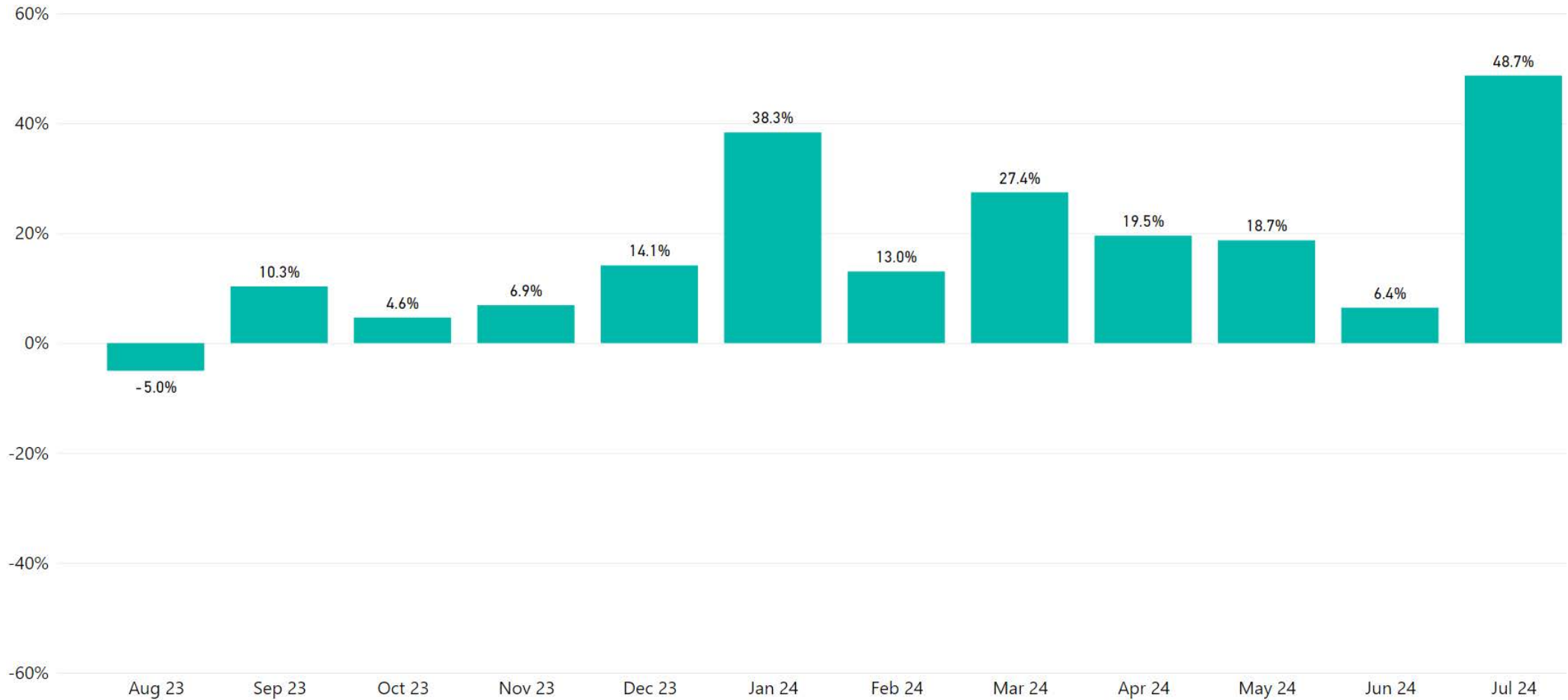
	# of SEATS Jan-June 2019	# of SEATS Jan-June 2023	# of SEATS Jan-June 2024P	% Change 24/19	% Change 24/23
Marshall Islands	17,018	12,284	17,264	1.4%	40.5%
New Zealand	60,028	45,709	34,568	-42.4%	-24.4%
Philippines	37,095	39,861	40,170	8.3%	0.8%
South Korea	159,338	142,999	152,989	-4.0%	7.0%
Taiwan	18,666			-100.0%	
United States	4,856,169	5,647,888	5,357,029	10.3%	-5.1%
Western Samoa	4,282	4,420	4,420	3.2%	0.0%
<b>TOTAL</b>	<b>6,702,620</b>	<b>6,765,353</b>	<b>6,759,582</b>	<b>0.8%</b>	<b>-0.1%</b>

# Market Insights

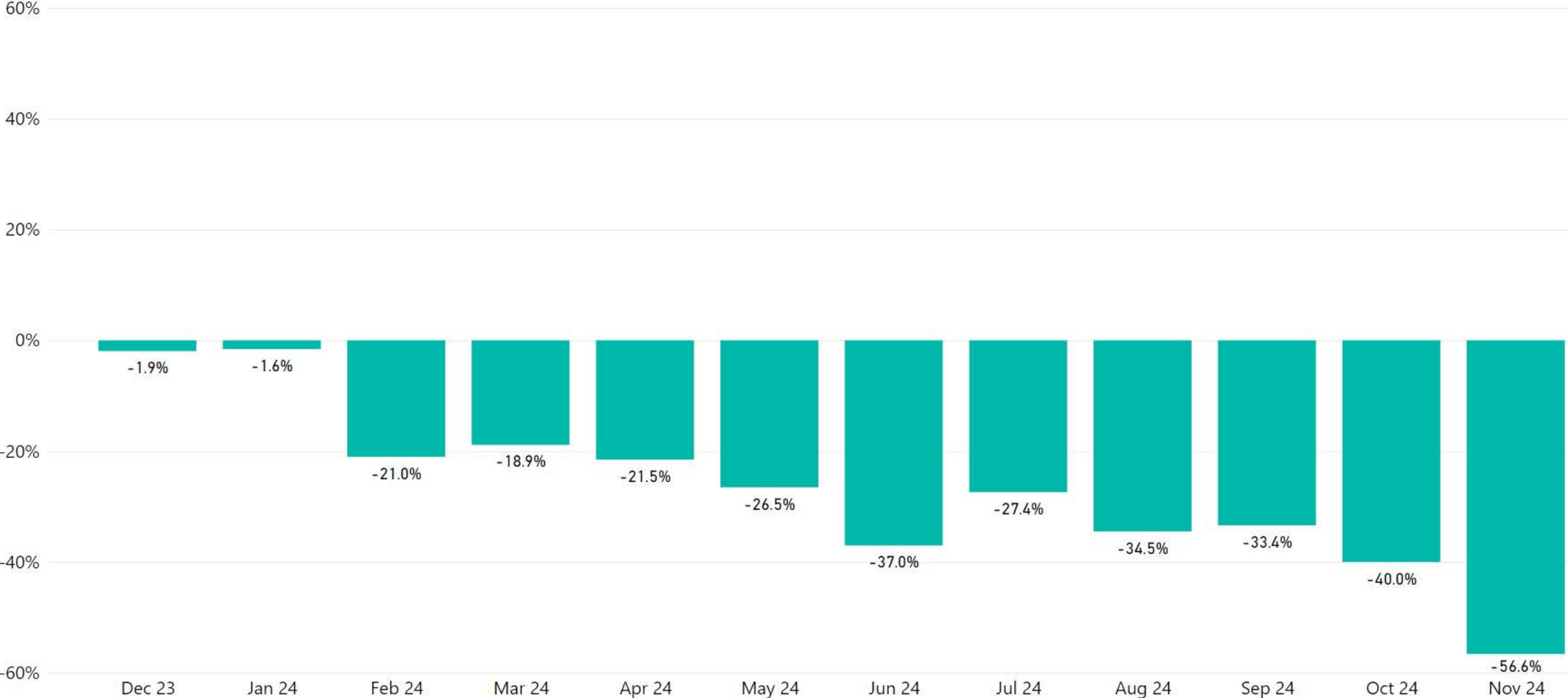
U.S. MMA Trans-pacific AIR SEAT SYNOPSIS  
 January – June 2024 Projections AS OF December 13, 2023

	# of SEATS 2019 Jan-June	# of SEATS 2023 Jan-June	# of SEATS 2024P Jan-June	% Change 24/19	% Change 24/23
<b>O'ahu</b>	2,413,284	2,889,030	2,952,953	22.4%	2.2%
<b>Maui</b>	1,275,965	1,507,009	1,209,131	-5.2%	-19.8%
<b>Kona</b>	581,808	654,810	616,713	6.0%	-5.8%
<b>Kaua'i</b>	481,642	515,569	472,908	-1.8%	-8.3%
<b>Hilo</b>	21,654	1,162			
<b>Total</b>	4,774,353	5,567,580	5,251,705	10.0%	-5.7%

# Maui Total Room Nights on the Books by Month YOY % Change (as of August 6, 2023)



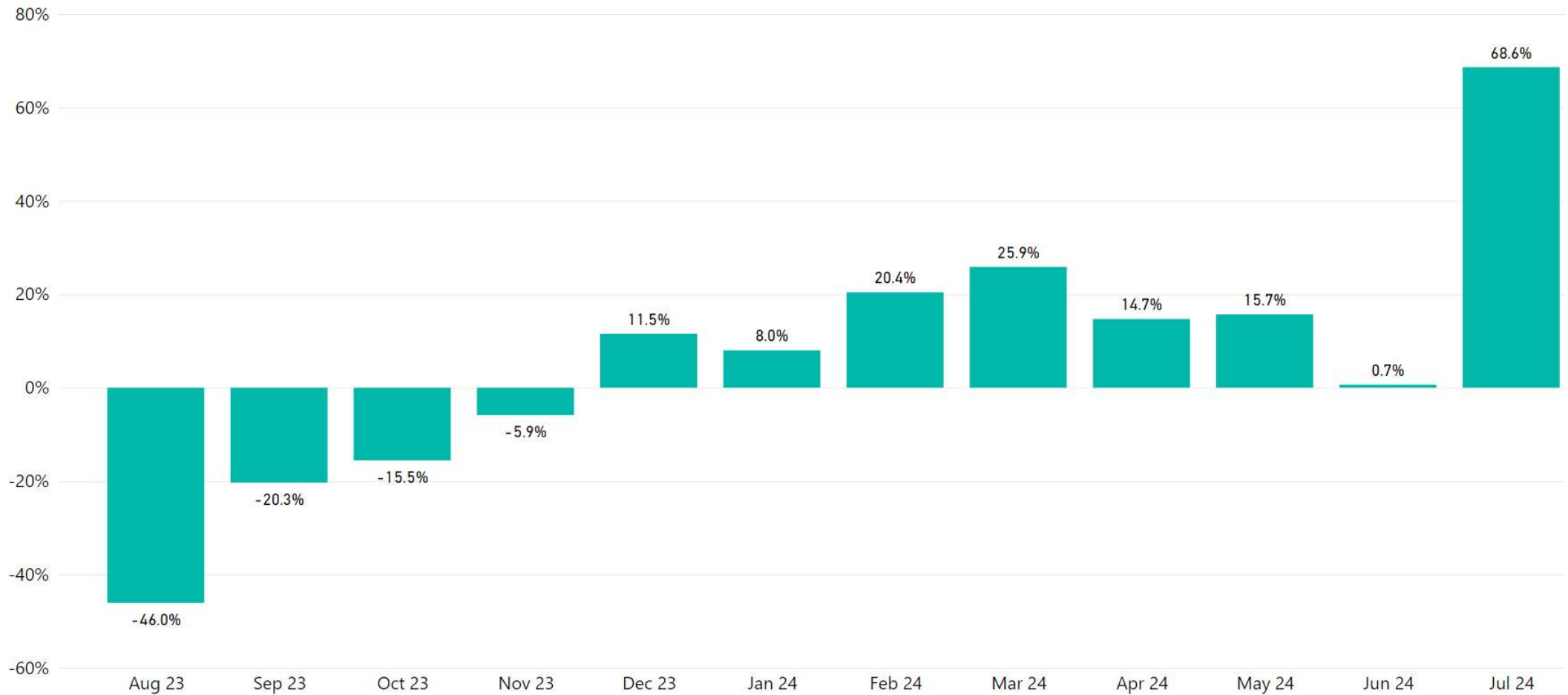
# Maui Total Room Nights on the Books by Month YOY % Change (as of December 10, 2023)



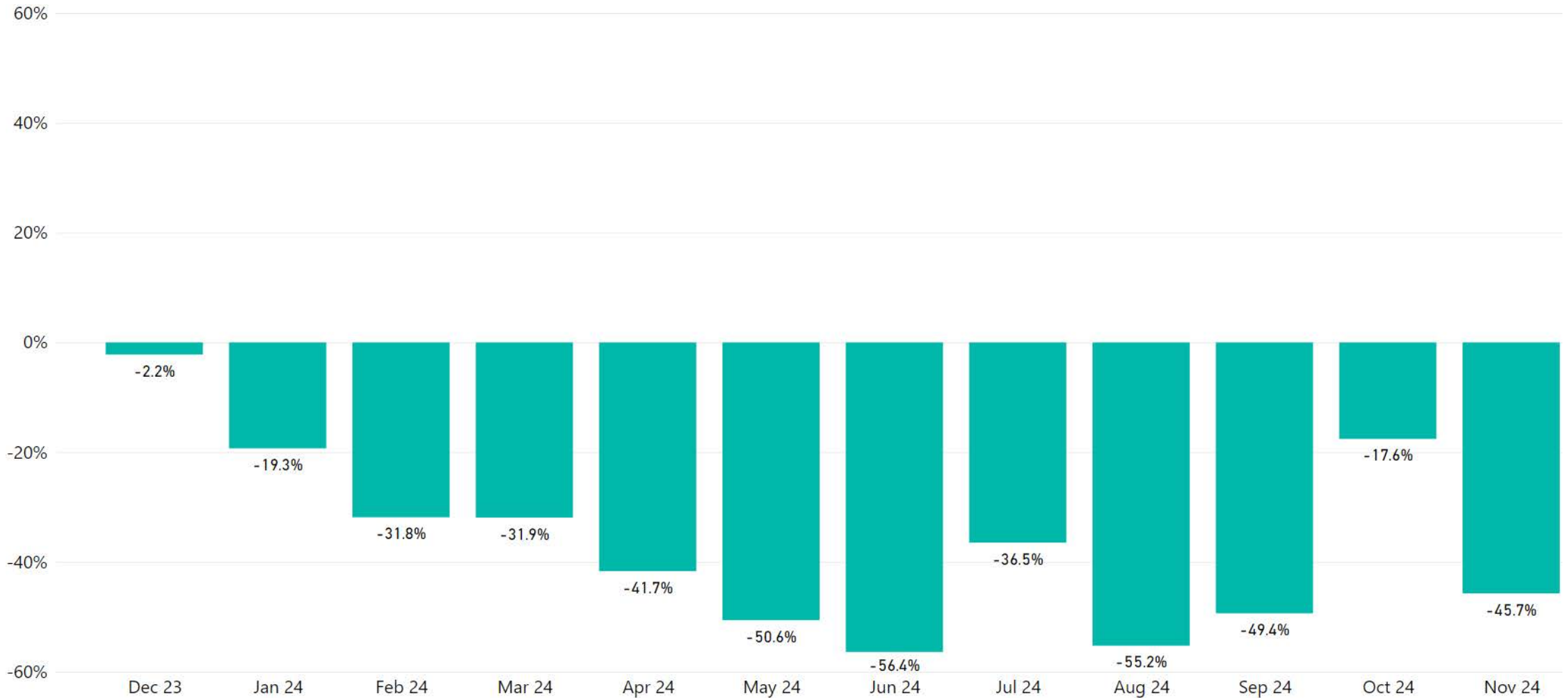
Source: HVCB analysis of TravelClick Data



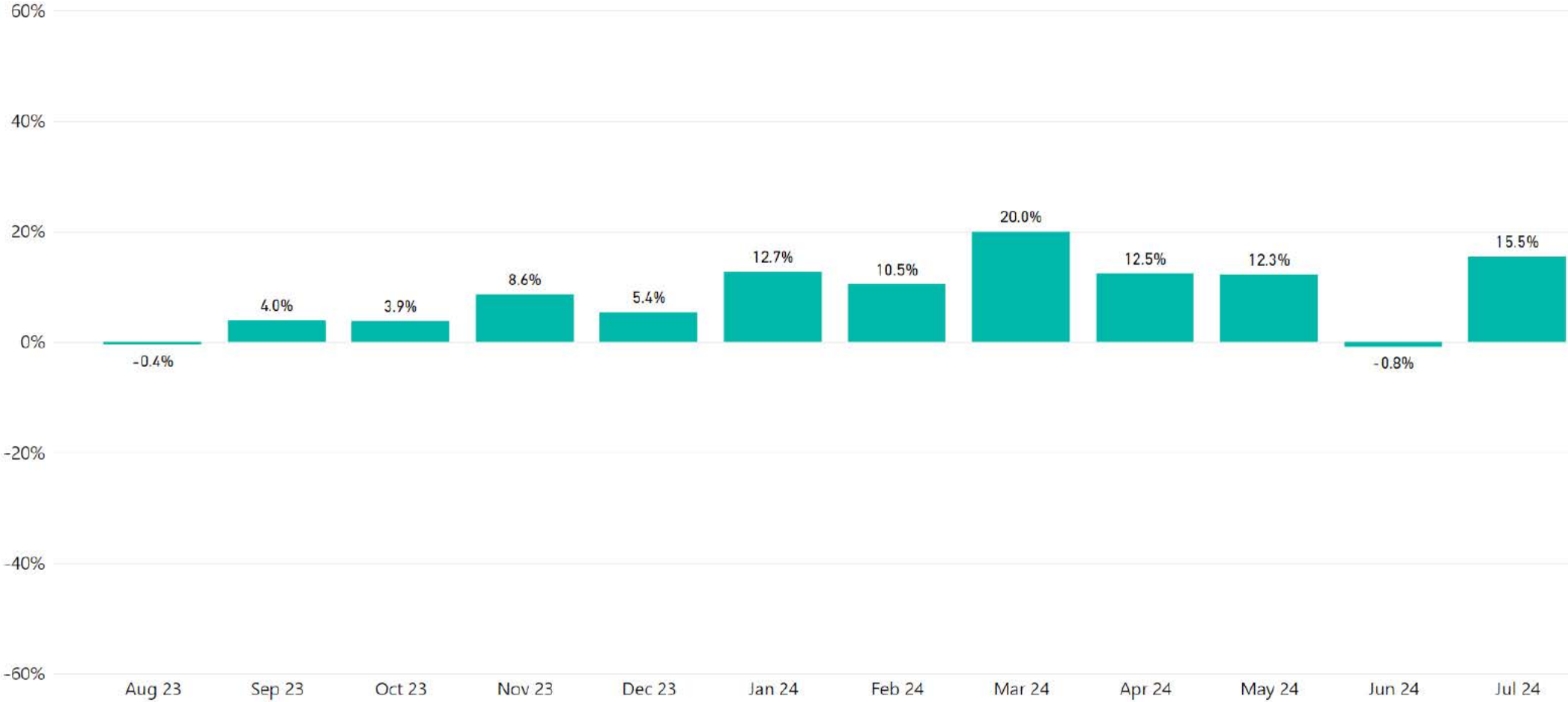
# West Maui Total Room Nights on the Books by Month YOY % Change (as of August 13, 2023)



# West Maui Total Room Nights on the Books by Month YOY % Change (as of December 10, 2023)

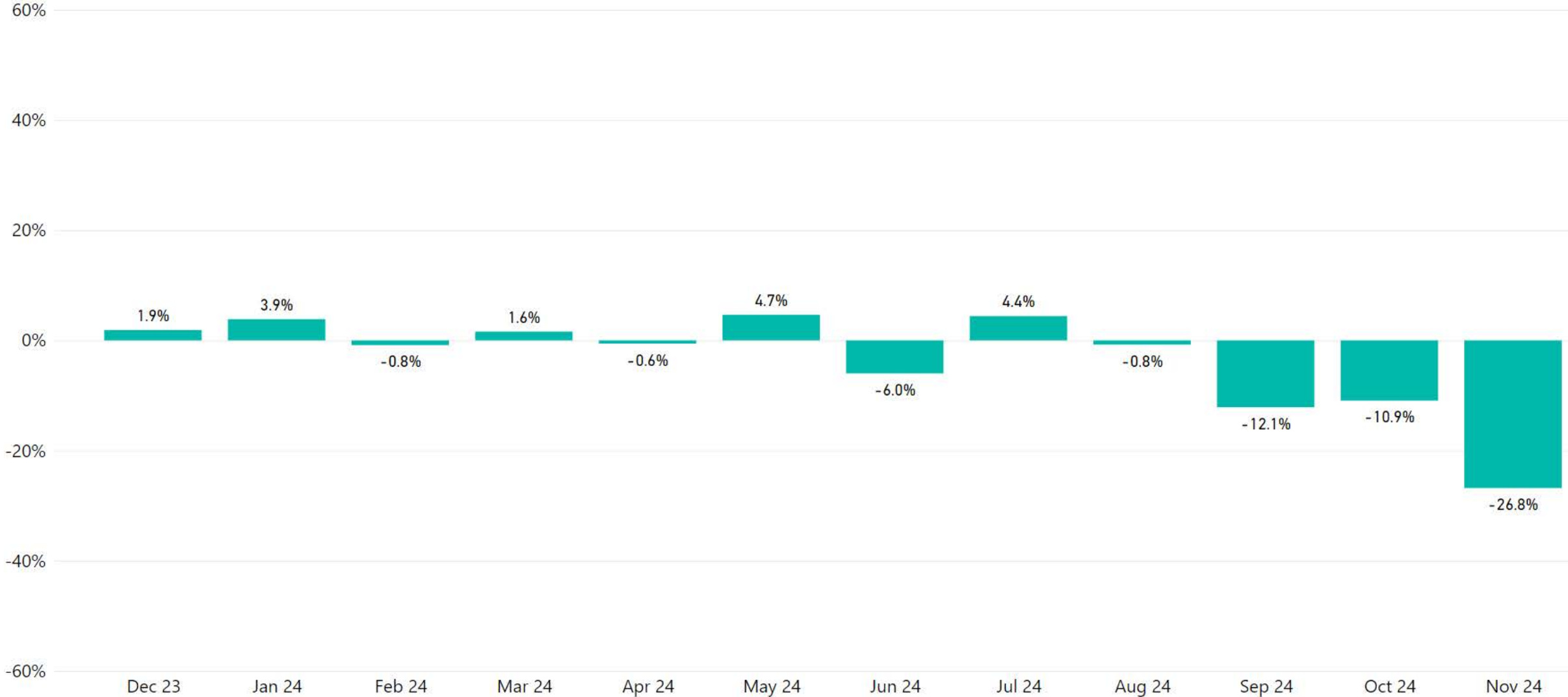


# Statewide Total Room Nights on the Books by Month YOY % Change (as of August 6, 2023)



Source: HVCB analysis of TravelClick Data

# Statewide Total Room Nights on the Books by Month YOY % Change (as of December 10, 2023)



Source: HVCB analysis of TravelClick Data

# Maui Fires Economic Impact

- \$11 million estimated economic loss per day
- Reduction of 4,250 visitors per day to Maui
- 91 flights canceled since the onset of the Maui wildfires
- 2,403 residential housing units destroyed
- West Maui accounts for 15% of Hawai'i's tourism economy
- Waikīkī is 35% of the State's tourism economy

# **U.S. Marketing Maui Recovery Plan 1 (August – December 2023)**

# 2023 Recovery Plan Review

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



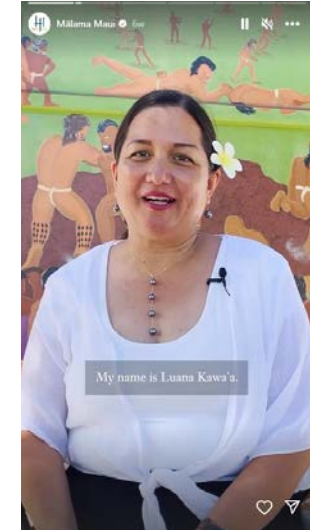
Kalei 'Uwēko'olani



Kia Ordonez



Luana Kawa'a  
"Kumu Luana"



Cody Pueo Pata



Shay Smith



Chef Taylor Ponte



Wendy Tuivaioe  
"Aunty Wendy"



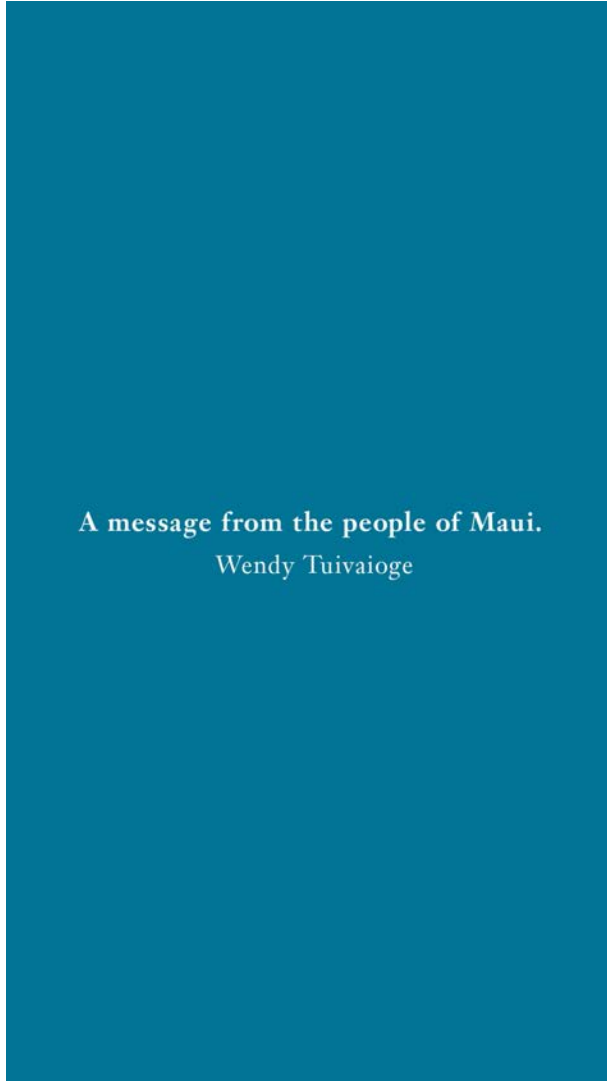


# Social Messaging

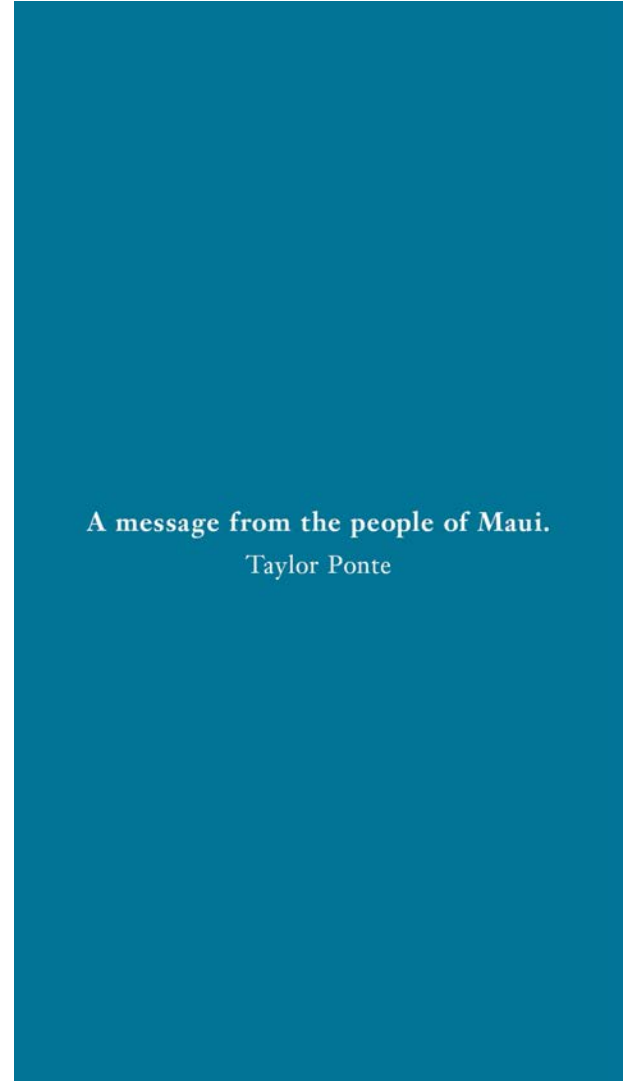
Kupa 'āina Series



A message from the people of Maui.  
Wendy Tuivaioe



A message from the people of Maui.  
Taylor Ponte



# Social Messaging

## Ola Maui Series

While Lahaina heals, Maui invites you to...

Explore the flavors of Hawai'i at the Kahului food trucks.

Walk Wailuku's Main Street and shop the local makers.

Replant trees at Kipuka Olowalu to help regrow the trees of Lahaina.

Discover what makes Maui so unique and take a trip that gives back to the local communities.

When visiting, remember to travel mindfully and *mālama* (care for) Maui. 🌈

Instagram

Facebook

YouTube



# Media Partners

## PGA Tour / NBC Golf Channel

- TV Tournament Broadcasts  
Lower thirds, VO messaging
- Digital  
pgatour.com  
golfdigest.com  
usatoday.com  
TPC Network

## Champions Tour

- TV Tournament Broadcasts  
:30 PSAs – Golf Channel



HELP MAUI



# Public Relations/Earned Media

## Entertainment Tonight

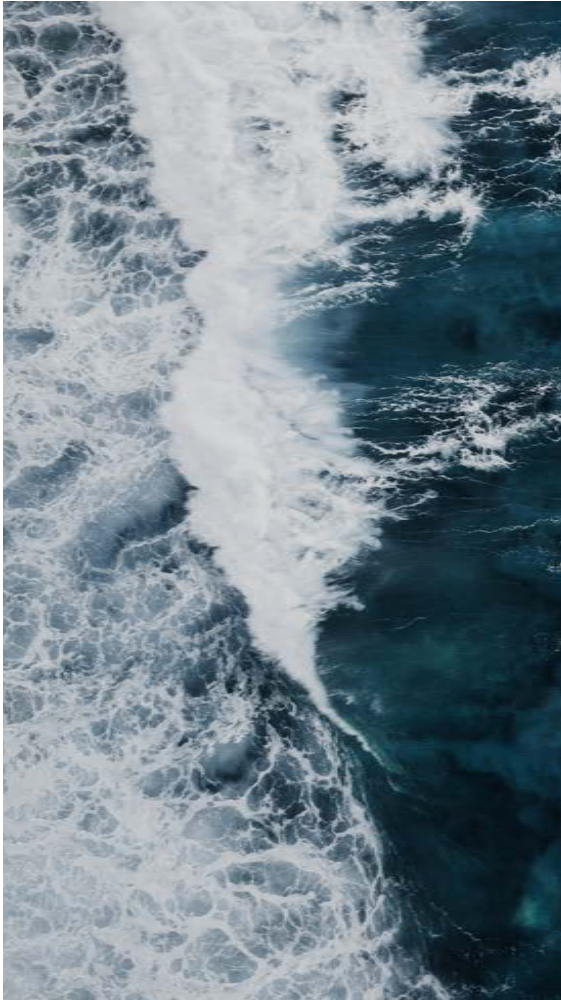
- Aired daily shows across the continent from Hawai'i, Nov. 6 – 10
- Emphasized the importance of responsible, compassionate travel to Maui
- Mālama experiences on O'ahu: Kualoa Ranch, Waimea Valley, Kōkua Learning Farm
- Partnered with Hawaiian Airlines, Sheraton Waikiki, Fairmont Kea Lani
- Audience of 4M daily



# The Plan – Moving Forward



# US Marketing Maui Recovery Plan 2 (January – June 2024)



- Continuity
  - Build upon 2023 efforts
- Uplift the people of Maui
  - Support the Maui community with their goal of economic recovery
- Innovation
  - Create a larger platform to amplify our voices

# 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 | 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

# Travel Trade

## In-Market and In-Destination Training

- In-Market Training
  - Travel Leaders EDGE
  - Travel Agent Forum
  - Cruise 360
  - Ultra Summit
  - Partner Webinars
- In-Destination Training
  - HTUSA/MVCB-led FAMS
  - Support Partner FAMS through presentations, activities and voluntourism experiences

## Consortia Programs

- Consortia Programs – Signature, Virtuoso, Travel Leaders Network
  - Agent and consumer facing tactics highlighting mālama messaging



**Nestled at the heart of the Hawaiian Islands,** Maui extends a warm invitation to visitors, ready to share its beauty and culture. In the wake of recent wildfires that swept through Lahaina, the island calls for your support more urgently than ever. These events serve as a poignant reminder of the profound influence travel can have for the many places that have graciously welcomed us. Your presence carries a significant weight, supporting the local community and bolstering the island's economy. For those seeking to make an even greater contribution, unique volunteer opportunities abound, allowing you to mālama (care for) Maui and leave behind a legacy of kindness and goodwill. Relish in the beauty of this amazing island while making a lasting and positive impact.

[Discover More](#)



**How You Can Help Maui**  
In the spirit of mālama for the people who can Maui more, please consider donating to the Maui Strong Fund or the People's Fund of Maui.

[MAUI STRONG FUND](#) — [PEOPLE'S FUND OF MAUI](#) —



# Public Relations/Earned Media

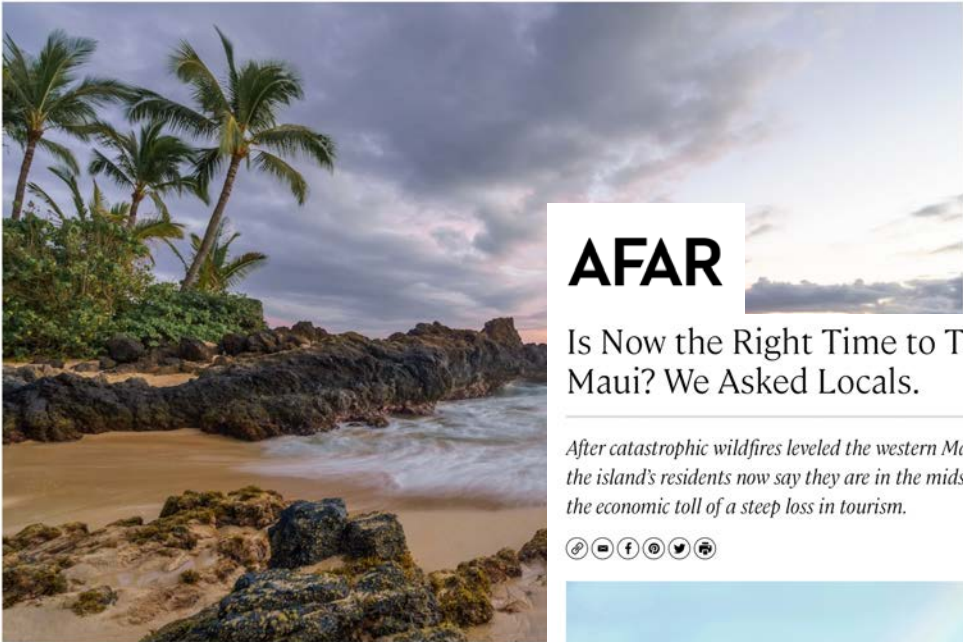
## Objectives & Strategy

- Uplift the voices of Maui
  - Small business owners, community leaders, hotel employees
- Add dimension to existing brand
  - There's so much to see and do
  - Support consumer brand partnership & Maui makers
  - Consider multi-island trips
- Pitching the Hot 100 List
  - Reconnect with media who first covered the disaster for follow-up stories
  - Highlight appropriate volunteer opportunities
  - Buy local: on-island or online
- Develop large-reach national editorial coverage

Skift MEETINGS News Events Reports Reviews

### Outside Lahaina, Maui Business Events Are Encouraged

Andrea Doyle  
August 21st, 2023 at 5:16 AM EDT



**AFAR**

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

*After catastrophic wildfires leveled the western Maui town of Lāhainā, 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

# Public Relations/Earned Media

## Tactics

- Proactive Pitching
- International Media Marketplace (Jan.)
  - One-on-one meetings with media
  - Participating in a panel on Destination Marketing
- Individual Media Visits to Maui
  - Encourage multi-island visits

## 9 Tips for Traveling to Maui Responsibly As the Island Recovers From the Wildfire

By enjoying and investing dollars in the local economy, you can help locals rebuild.

By [Karla Walsh](#) | Published on November 28, 2023



*"However, now, rather than asking travelers to keep their distance, Maui lawmakers, businesses, tourism officials, and the vast majority of locals Travel + Leisure spoke to on the ground in early November are ready to welcome back guests. In fact, Hawaii's second-largest and second most visited island needs guests to return."*  
- Karla Walsh, Travel + Leisure

The Washington Post  
*Democracy Dies in Darkness*

BY THE WAY

## 5 ways to be a good visitor on Maui as tourism reopens

In the wake of Hawaii's deadly wildfires, it's better to give than take



Advice by [Andrea Sachs](#)  
Staff writer

October 23, 2023 at 8:00 a.m. EDT

# Public Relations/Earned Media

## Media Blitzes – Virtual & Bay Area

- Virtual Media Blitz (Q1)
  - One-on-one meetings with media across the continent
  - Include local ambassadors, Maui makers
- Bay Area Media Blitz (Spring)
  - One-on-one meetings with media in San Francisco, San Jose, Marin
  - Engage in a Mālama volunteer project in-market alongside media
  - Include local ambassadors, Maui makers



# Public Relations/Earned Media

## San Francisco Bay Area Experiential Event

May 2024

- Mālama Maui
  - Maui chefs, makers, musicians, cultural ambassadors
  - Educate and inspire:
    - Top-tier national media
    - High net-worth Mindful Hawai'i Target Travelers
- In collaboration with Maui partners
- Mālama in action
  - Mālama the Sonoma County community
  - Raise funds for Maui





# Consumer Messaging

## Audience Truth

In a time when everyone is an influencer, we think we have all the answers all the time.

## Brand Challenge

Hawai'i may be the most popular yet misperceived destination there is.

What if we could add value to travelers by eliminating their expectations?

IDEA '24

# LEAVE YOUR BAGGAGE BEHIND

HAWAII x AWAY

Asking travelers to come open-minded.



# LEAVE YOUR BAGGAGE BEHIND

Asking travelers to come open-minded and empty-handed.

Buying local and learning about the *mo'olelo* (stories), people, and communities behind the places around you is the best way to take away Maui's true story.

Let's call on mindful travelers to come with an open mind and an empty bag, leaving their perceptions of Maui at home, while filling their bags as they visit.

POTENTIAL PARTNERS **AWAY**



## KEY ELEMENTS

### Launch

Engage with a partner and jointly ask travelers to visit Hawai'i with nothing and leave with a new-found understanding of the islands as well as mementos from local curated experiences.

### Sustain

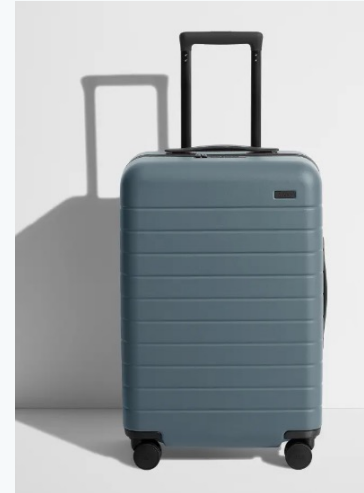
Amplify local makers & on-island partnerships that connect incoming travelers with local businesses & experiences.

### Social

Challenge influencers and invite travelers to join the "empty bag trip" movement and give local itineraries for each of the islands.

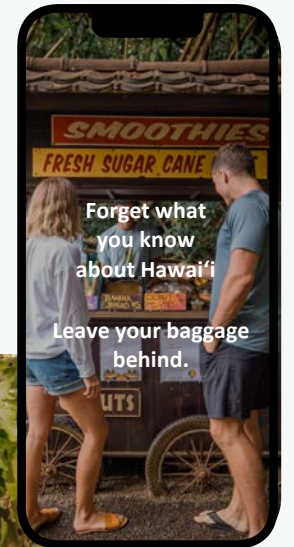
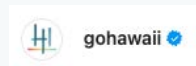
### Paid

Strategic amplified paid content to raise awareness, drive new Maui and Hawai'i perceptions and inspire experiences to support a larger part of our community.



## EXCLUSIVE PRODUCT DROP

Engage local designers to create unique bags in partnership with AWAY that labels them as "mindful and supportive travelers". We'll create six different bags with designers from Maui and across the islands.



Leave your baggage behind, and get to know the real Maui

## SOCIAL

Paid social can drive incoming visitors to local experiences that support small businesses and that help preserve Hawai'i's resources and stories. We'll elevate local *kupa 'aina* who can amplify messaging on organic channels.



# Budget

## January through June 2024

<b>Consumer Direct</b>	
Maui Ola Paid Social Media/Content	\$700,000
Made from Maui Promotion/Media	\$1,400,000
<b>Public Relations</b>	
Media Blitzes (Virtual, Bay Area)	\$100,000
Healdsburg Food & Wine Experience Sponsorship	\$50,000
Maui & Multi-island Media Visits	\$50,000
<b>Travel Trade</b>	
Travel Partner Education Programs	\$110,000
Trade FAMS	\$60,000
Consortia Cooperative Marketing Programs	\$30,000
<b>Total:</b>	<b>\$2,500,000</b>

A close-up photograph of a green leaf, showing a network of veins. The central vein is the most prominent, with smaller veins branching off at regular intervals. The leaf's surface has a slightly textured appearance. The word "Mahala" is written in a white, cursive font across the lower-left portion of the leaf.

*Mahala*