



**Hawai'i Tourism United States
2025 U.S. Leisure Plan**

Agenda



- Current Market Situation
- Target Audience
- Messaging
 - The People The Place The Hawaiian Islands
- Social Media
- Branded Content
- Public Relations
- Travel Trade
- Partnership Opportunities



Market Insights



Market Insights

- GDP will continue to grow throughout the remainder of 2024 and then slow into 2025
- The U.S. MMA remains the primary source market for the Hawai'i visitor industry
- Transpacific airlift from the U.S. remains stable, Honolulu is the dominant destination for seats
- Maui continues to see softness for visitation and non-stop airlift
- Hotel booking pace trend for room nights is mixed. Maui, particularly West Maui continues to face declines in future bookings.

U.S. Arrivals & Spending Increase 2024 Year-to-Date through August

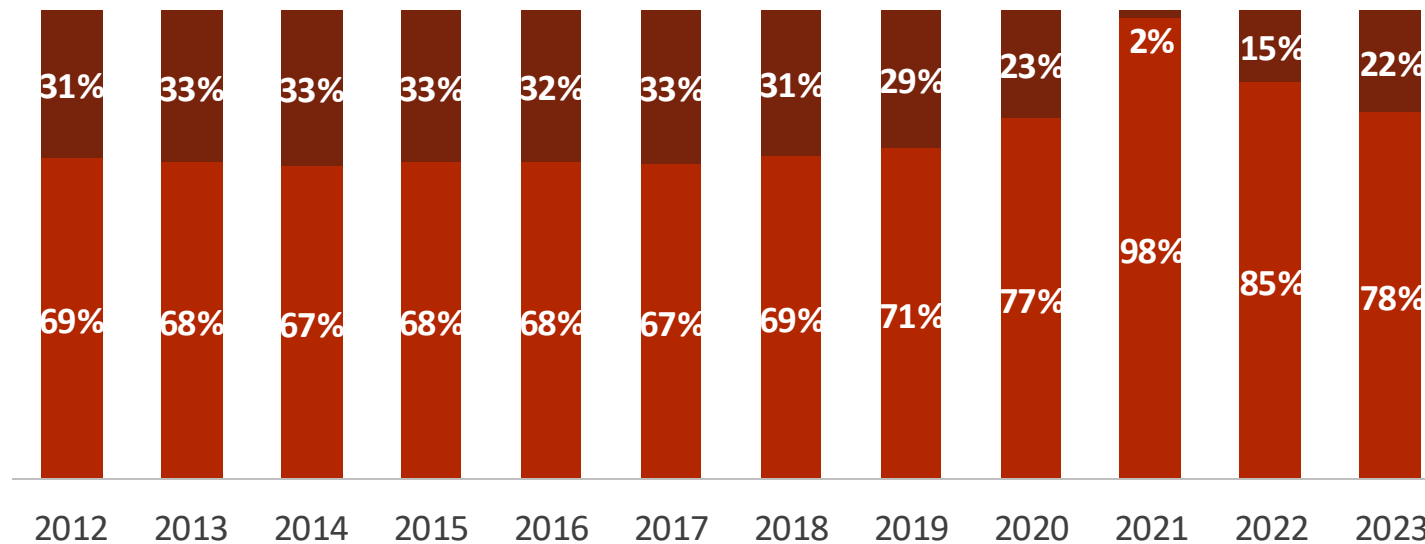
	Visitor Arrivals	Expenditures	\$PPPD
Total U.S.	5.00 million (-4.7%)	\$10.86 billion (-2.9%)	\$245.9 (+3.0%)
U.S. West	3.36 million (-4.1%)	\$6.59 billion (-1.6%)	\$233.8 (+3.8%)
U.S. East	1.64 million (-5.9%)	\$4.26 billion (-4.8%)	\$267.4 (+1.9%)

Source: HTUSA analysis of HTA data, YTD through August 2024P

U.S. Share of Hawai'i Visitors Remains Strong

Share of Visitor Arrivals by Year

■ US MMA ■ Other MMAs

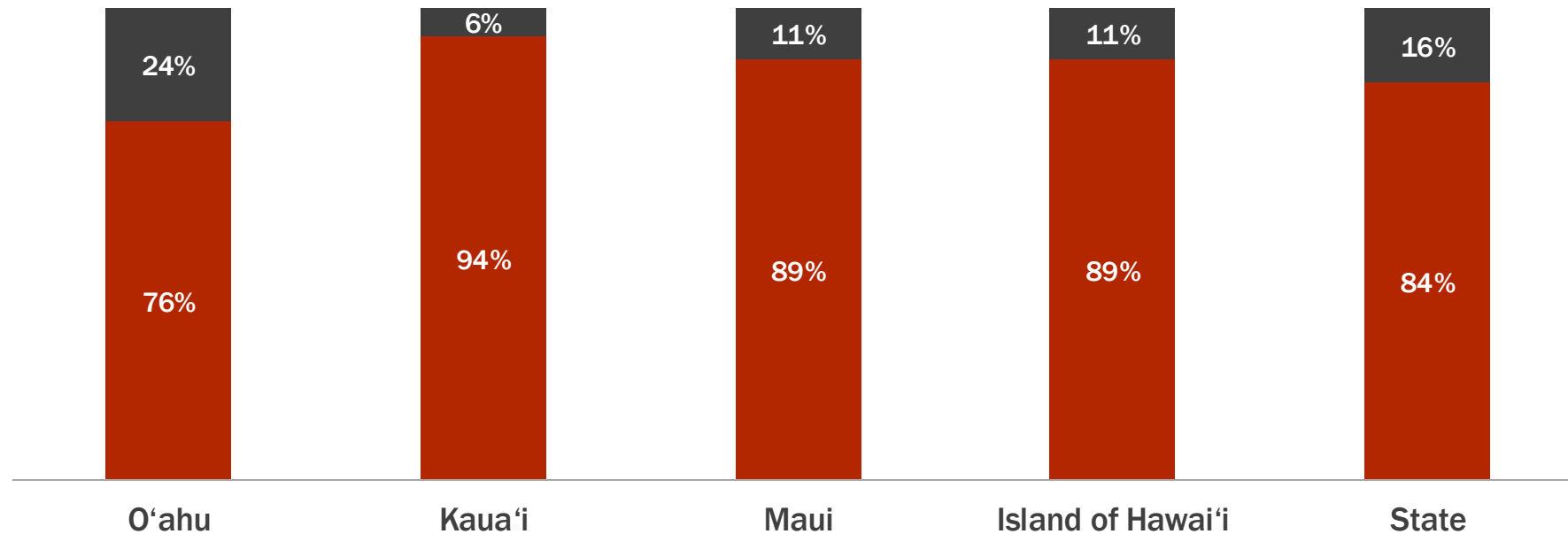


Source: HTUSA analysis of HTA 2023 data

U.S. Market is Foundation of Hawai'i's Visitor Industry

Share of visitor arrivals by island in 2023

■ US MMA ■ Other MMAs



Source: HTUSA analysis of DBEDT 2023 data



Looking Ahead to 2025

U.S. Economic Growth to Slow into 2025

U.S. GDP Growth Forecast



Source: HTUSA analysis of S&P Global Ratings data

U.S. MMA Trans-Pacific Air Seat Synopsis October – December 2024 Projections

	# of SEATS 2022 Oct - Dec	# of SEATS 2023 Oct- Dec	# of SEATS 2024P Oct - Dec	% Change 24/22	% Change 24/23
O'ahu	1,376,751	1,474,203	1,490,951	8.3%	1.1%
Maui	727,461	540,648	569,966	-21.6%	5.4%
Kona	290,696	329,897	317,849	9.3%	-3.7%
Kaua'i	267,067	227,654	241,867	-9.4%	6.2%
Total	2,661,975	2,572,402	2,620,633	-1.6%	1.9%

U.S. MMA Trans-Pacific Air Seat Synopsis

January – April 2025 Projections as of September 2024

	# of SEATS 2023 Jan-April	# of SEATS 2024P Jan-April	# of SEATS 2025P Jan-April	% Change 25/23	% Change 25/24
O'ahu	1,916,361	1,964,880	1,978,095	3.2%	0.7%
Maui	1,017,760	783,533	765,413	-24.8%	-2.3%
Kona	430,274	410,945	413,525	-3.9%	0.6%
Kaua'i	339,117	303,396	307,072	-9.4%	1.2%
Total	3,703,512	3,462,754	3,464,105	-6.5%	0.0%

Hawai'i (All Islands) Total Room Nights On The Books September 2024 – May 2025 CY vs 2YAGO as of September 15, 2024

Month	State of Hawai'i	O'ahu	Maui	West Maui	Kaua'i	Island of Hawai'i
September 2024	-2.7%	-1.8%	-19.1%	-29.9%	+34.2%	-6.3%
October 2024	-5.7%	-2.4%	-33.1%	-41.0%	+24.0%	-15.1%
November 2024	-9.4%	-8.2%	-48.1%	-56.1%	+1.0%	-4.5%
December 2024	+1.0%	+1.9%	-49.6%	-58.8%	+17.6%	+1.9%
January 2025	+6.0%	+4.7%	-11.5%	-	+30.2%	+30.8%
February 2025	+7.2%	+8.8%	-8.8%	-	+26.5%	+30.7%
March 2025	+10.3%	+14.2%	+1.0%	-	+23.9%	+6.7%
April 2025	+9.5%	+21.7%	-12.5%	-	+8.2%	+10.8%
May 2025	+14.7%	+20.7%	-13.0%	-	+38.5%	+43.4%

West Maui Total Room Nights Booked & Consumed & On The Books January 2024 - December 2024 CY over 2022 as of September 15, 2024

Month	September 15, 2024	September 8, 2024	September 1, 2024
January 2024	+50.7%	+50.7%	+50.7%
February 2024	+44.9%	+44.9%	+44.9%
March 2024	+16.9%	+16.9%	+16.9%
April 2024	+4.3%	+4.3%	+4.3%
May 2024	+3.7%	+3.7%	+3.7%
June 2024	-19.1%	-19.1%	-19.1%
July 2024	-21.9%	-21.9%	-21.9%
August 2024	-29.7%	-29.7%	-29.8%
September 2024	-29.9%	-31.3%	-33.9%
October 2024	-41.0%	-46.6%	-50.4%
November 2024	-56.1%	-58.8%	-61.8%
December 2024	-58.8%	-61.8%	-64.4%



Target Audience

Travel Marketing Continuum



Audiences



HAWAII RESIDENT

Kaiaulu – Community Based

Strongly connected to their local communities, prioritizing family, tradition, and mutual support.

Kumupa‘a – Culturally Rooted

Deep respect for both Hawaiian and local traditions and practices, with a commitment to preserving cultural heritage.

Aloha ‘Āina - Environmental Stewards

Passionate about protecting Hawaii's natural resources, advocating for sustainability and responsible tourism.

Kia‘i Aloha - Guardians of Aloha

Strive to maintain the spirit of aloha.



HAWAII TARGET TRAVELER

Respectful Explorer

Curious about Hawaii's unique beauty and traditions, and mindful of their impact on communities and the environment.

Culinary Enthusiast

Travel to enjoy new cuisines, discover traditional dishes, and support local restaurants, farmers, ranchers, and fishers.

Cultural Curiosity

Interested in Hawaiian culture; appreciate being enriched while learning about local traditions.

Soft Adventure

Seek moderate outdoor activities like hiking and snorkeling as they explore during the day and come back to luxury at night.



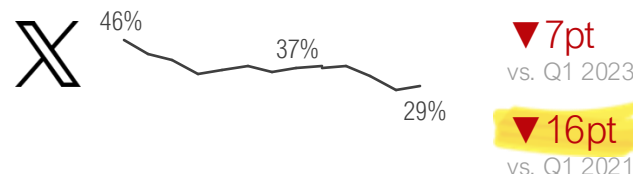
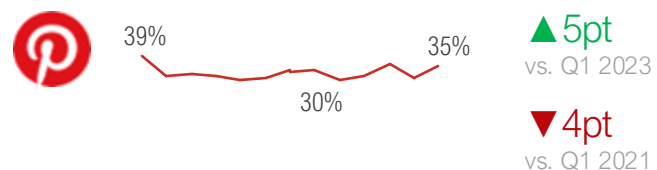
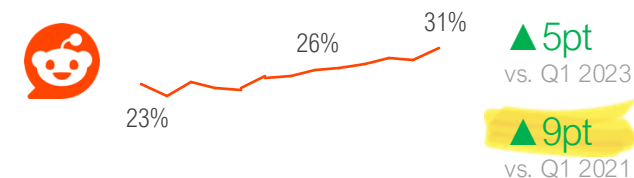
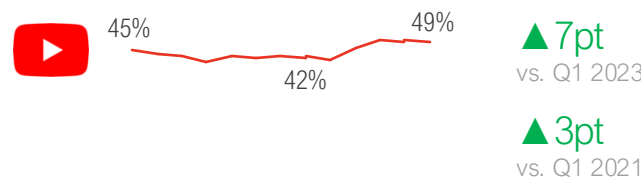
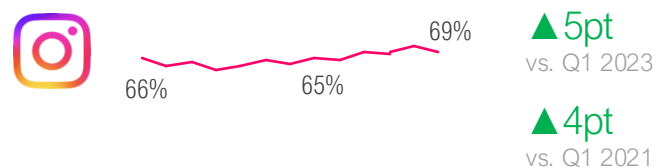
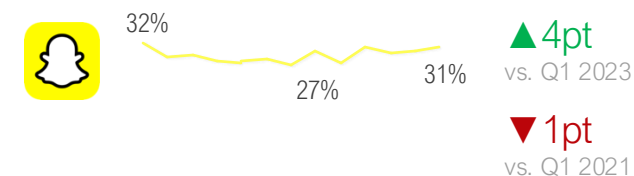
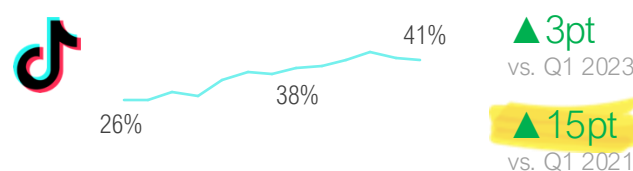
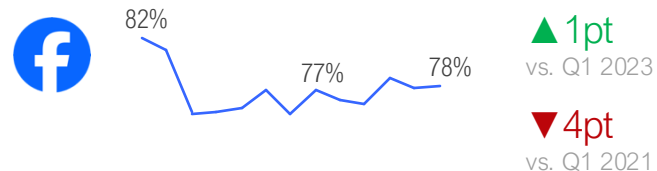
Messaging



**The People
The Place
The Hawaiian Islands**



Monitoring Social Media Engagement: Tracking Our Target Audience



Shaping Strategy: How Social Media Attitudes Drive Content and Channel Choices

% of HTT target who...

Clicked on a promoted post or ad on IG (20%)

Searched for something on TikTok (14%)

Watched or Uploaded Content to IG Reels (35%)

Use YouTube Shorts Weekly or More (18%)

	<u>Δ vs. 2023</u>	<u>Δ vs. 2021</u>
Clicked on a promoted post or ad on IG (20%)	32%	41%
Searched for something on TikTok (14%)	37%	106%
Watched or Uploaded Content to IG Reels (35%)	23%	91%
Use YouTube Shorts Weekly or More (18%)	–	–
Among top 3 reasons for using social media, % of HTT who chose...		
Filling spare time (30%)	9%	40%
Posting about your life (17%)	4%	23%
Finding inspiration for things (e.g., places to visit, things to buy, etc.) (25%)	11%	40%
% of HTT who say they hear about new products or services via...		
“Social media posts” (47%)	12%	18%
“Ads on social media” (50%)	9%	24%
“Sponsored posts on social media” (32%)	31%	49%
“Recommendations from Friends/Family” (45%)	1%	20%



TikTok-style content continues to take hold among MHTTs across the social landscape

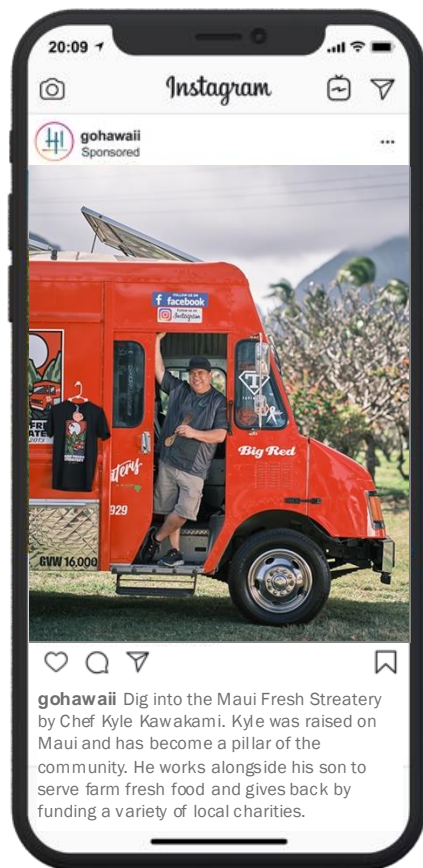


“Lean back” behavior is growing

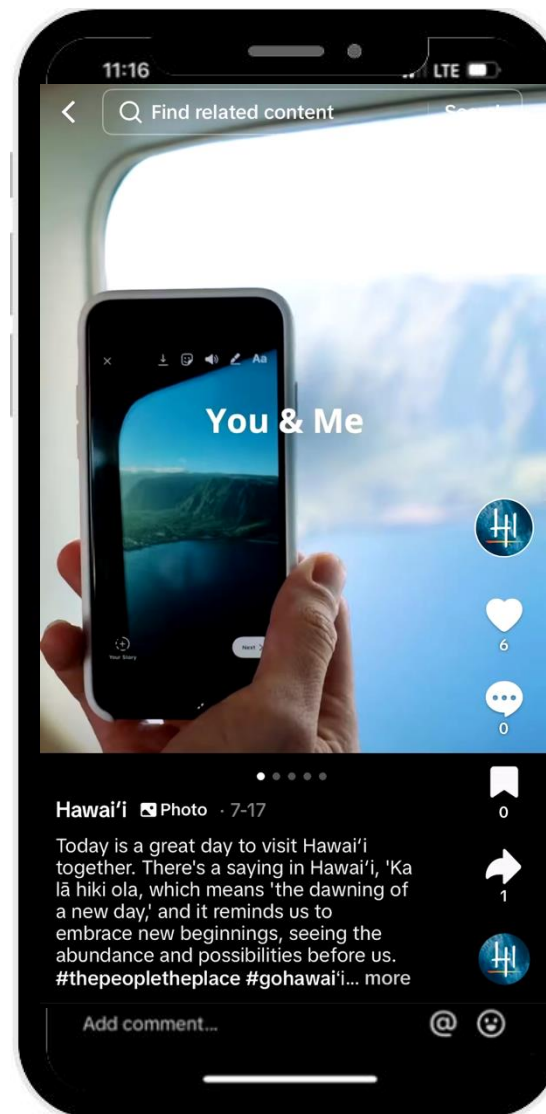


A combination of organic and paid social is critical for reaching and inspiring potential travelers

Social Posts – Chef Kyle Kawakami



Social Posts





Branded Content

Branded Content Programs

Condé Nast Traveler

Condé Nast
Traveler

INSPIRATION DESTINATIONS PLACES TO STAY NEWS & ADVICE TRAVEL WELL SHOPPING CRUISE WOMEN WHO TRAVEL VIDEO

(De)tour by Condé Nast Mission Studio: Hawai'i
Sponsored content by The Hawaiian Islands

Produced by Condé Nast Traveler with The Hawaiian Islands

Condé Nast
Traveler

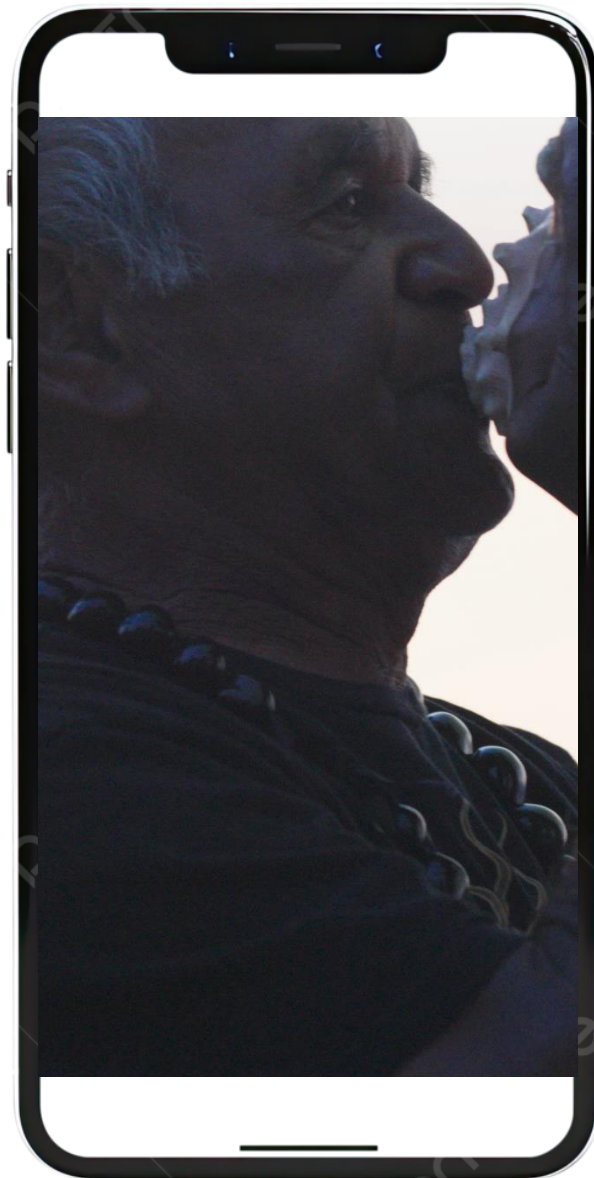
HAWAIIAN
ISLANDS

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(De)tour by Condé Nast Mission Studio: Hawai'i



Branded Content Programs Matador Networks





Public Relations

Public Relations

Strategy

- Nurture and leverage key media relationships across the U.S. continent
 - New: Hot 100 List to include regional publications in key markets
- Keep Maui and the Hawaiian Islands top of mind
- Secure media visits highlighting the people and places that make Hawai'i special
- Focus: Stronger invitation to visit
 - Unique visitor experiences
 - Indigenous and local culture

Forbes

Why There Has Never Been A Better Time To Visit Hawaii

DeMarco Williams Contributor
Forbes Travel Guide Contributor Group

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May 20, 2024, 04:30pm EDT

Updated May 24, 2024, 04:37am EDT



TRAVEL+
LEISURE

America's Best Small Beach Town Has World-class Waves — Plus Delicious Restaurants and Charming Boutiques

Pa'ia, Maui has long been known for great surf, but now it's emerged as the island's coolest hub for shopping, art, and food.

By [Jen Murphy](#) | Published on September 5, 2024

In This Article

Why Pa'ia Is the Best Beach Town in the U.S. for 2024

Where to Stay

Things to Do

Where to Shop

Where to Eat and Drink

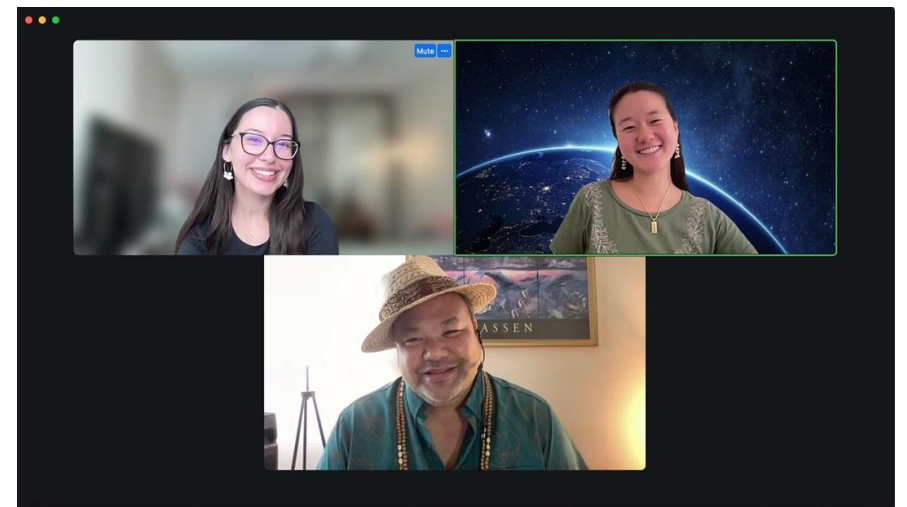
The Best Times to Visit



Public Relations

Programs and Tactics

- Expanded Hawai'i presence at IMM
 - Jan. 22-23, 2025, New York
- Follow-up to 2024 LA Saturation
 - Coordinated with Travel Trade Educational Blitz
- Virtual Media Blitz
- Seek Broadcast opportunities
 - Confirmed for Q1: NBC's First Look (West Maui)





Travel Trade

Travel Trade

HTUSA will leverage its influential travel trade relationships to deliver destination messaging and education to qualified travel advisors and their clients to keep Maui and The Hawaiian Islands top of mind. This will be accomplished through:

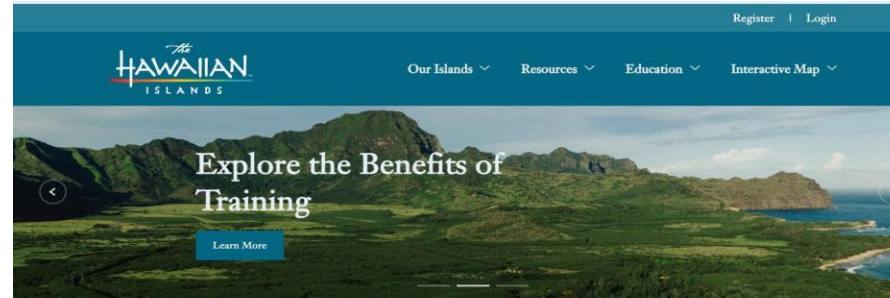
Events and Training

- HTUSA Educational Blitz Events in the US
 - February – Key US West Markets
 - October – Key US East Markets
- Wholesale, Consortia, Industry Events
- Familiarization (FAM) Tours
 - HTUSA-led in-destination multi-island programs
 - Support for key partner-led programs



Travel Trade

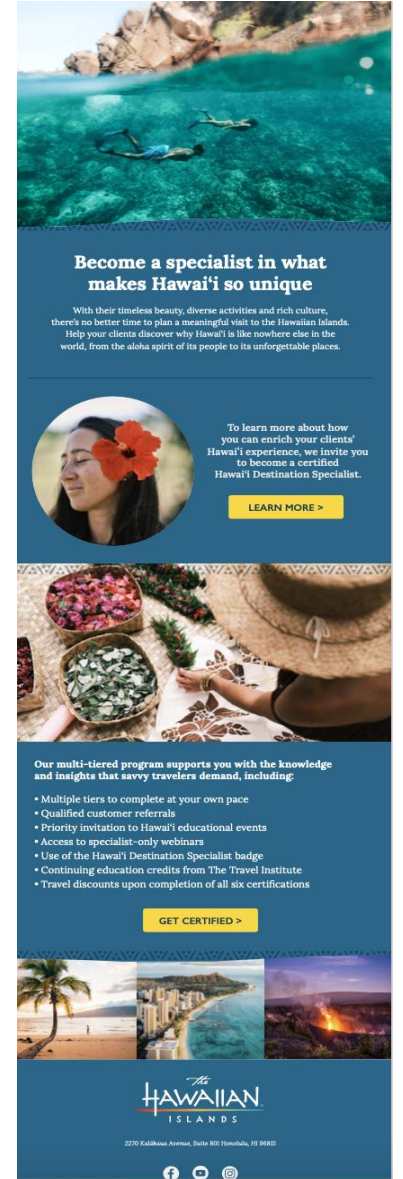
- Trade Marketing
 - Paid Trade Media to drive website registrants and certification course completions
 - Consortia Partnerships
 - Signature Travel Network
 - Travel Leaders Network
 - Virtuoso
 - Owned Database Communications to 45K+ active travel advisors
- Trade Content Development
 - Agents.GoHawaii.com
 - Curriculum update of the Hawai'i Destination Specialist Program




The People. The Place. The Hawaiian Islands.

Hawai'i is like nowhere else – and sharing the values of our people and encouraging visitors to experience our unique culture is what makes this place so special.

We invite your clients to see our islands' natural beauty in a new way, as the backdrop, while showcasing the beauty of our values as *kama'āina* (local residents). From the melodic sounds of Hawaiian music on Kauai to spreading *aloha* with fragrant *lei* on O'ahu. From the *malama* (care) of Native Hawaiian knowledge on the island of Hawai'i to using food to bring community together on Maui. We encourage visitors to seek engaging experiences when they come, which helps spread the benefits of tourism to broader communities throughout these islands.





Partnership Opportunities

2025 PARTNERSHIP OPPORTUNITIES

HVCB Island Chapters Meet Hawai'i	ACTIVITY	DATE	DESCRIPTION	LOCATION	COST	CONTACT (Name & Email)
CONSUMER PROMOTIONS						
HVCB, KVB, OVB, MVCB, IHVB	Mālama Hawai'i Program – Volunteer Experiences	Ongoing	Visitors are encouraged to give back to the destination by participating in the Mālama Hawai'i Program. Volunteer opportunities are listed on gohawaii.com/malama via Kanu Hawai'i's dashboard. Participate by offering a voluntourism activity.	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	\$0	Lei Field lfield@hvcb.org
HVCB, KVB, OVB, MVCB, IHVB	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	Lei Field lfield@hvcb.org
HVCB	Hawai'i Statewide Visitors' Guide	Annual with mid-year updates	The Hawai'i Statewide Visitors' Guide (statewide with individual island sections for Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, and Island of Hawai'i) is published annually in digital format with dynamic listings. This is the official pre-arrival vacation planner for consumers. The guide receives targeted digital distribution modeled on Hawai'i first-party consumer data, as well as HVCB firmwide distribution and promotion throughout the year. Various advertising opportunities are available.	U.S.	Varies	HVCB Membership Department: membership@hvcb.org
HVCB, KVB, OVB, MVCB, IHVB	The Hawai'i Visitor Guidebooks: <i>Experience Kaua'i</i> <i>Experience O'ahu</i> <i>Experience Maui, Moloka'i, Lāna'i</i> <i>Experience Hawai'i Island</i>	Semi-Annual	The Hawai'i Visitor Guidebooks are the official post-arrival, island-specific guides for Kaua'i, O'ahu, Maui/Moloka'i/Lāna'i, and Island of Hawai'i. They are published semi-annually in print and digital formats for use in-destination to promote local activities, dining, shopping, products, and services. Distributed at airports and key strategic visitor locations on each island. Various advertising opportunities are available.	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	Varies	HVCB Membership Department: membership@hvcb.org
HVCB	Statewide Consumer Special Offers: GoHawaii App.	Ongoing	The GoHawaii app is a destination pre/post arrival tool to plan the most enriching Hawai'i vacation. Partners submit consumer special offers.	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	Varies	HVCB Membership Department: membership@hvcb.org
HVCB	Statewide Kama'āina Campaigns	Quarterly	Digital statewide campaign targeted to the kama'āina market, offering Hawai'i residents exclusive specials on accommodations, activities, attractions, shopping, dining, etc. Partners provide kama'āina offers.	Kaua'i, O'ahu, Maui, Moloka'i, Lāna'i, Island of Hawai'i	Varies	HVCB Membership Department: membership@hvcb.org
HVCB	E-newsletter: <i>Islands of Aloha Express</i>	Monthly	The consumer e-newsletter offers partners an opportunity to reach up to 230,000 opted-in subscribers who have expressed an interest in traveling to the Hawaiian Islands. It includes stories about Hawai'i, a festivals and events calendar, travel planning tips, special offers, and downloadable wallpapers.	U.S.	Varies	HVCB Membership Department: membership@hvcb.org



Mahala



Los Angeles Market Activation

Los Angeles Market Activation September



**Aloha Market with
Mana Up**

**Public/Private
Media Blitz**



**Long-term partnership
meetings with L.A. Rams**

**Consumer Direct
Coop Programs**



The People, The Place, The Hawaiian Islands

Organic & Paid Content

Los Angeles Market Activation

PR Media Blitz: Sept. 17 – 19

- Objective:
 - Influence and inspire editorial coverage about the Hawaiian Islands
- Strategy:
 - HVCB: Brand building with destination trends and key updates
 - Partners: Keep Hawai'i top of mind, present media hosting opportunities
- Tactics:
 - One-on-one meetings with editors and freelancers in the LA area

Outside Los Angeles
MAGAZINE

Los Angeles Times Forbes

JustLuxe TRAVEL+
LEISURE

The New York Times  USA
TODAY

Fodor's Travel Smithsonian
MAGAZINE

Consumer Activation

Aloha Market Pop-up: Sept. 20 – 22

- Mana Up Hawai'i partnership
- Heart of Abbot Kinney Boulevard, buzzy neighborhood with great foot traffic
- 6,000 sq. ft. of retail space featuring 50+ Hawai'i entrepreneurs
- Activations included workshops, demos and panels
- VIP Receptions excited media, influencers, travel advisors, MCI clients
- Local coverage on KTLA, ABC, FOX

