



Hawai'i Tourism Authority
Spring Tourism Update
U.S. Leisure Market
March 5, 2025



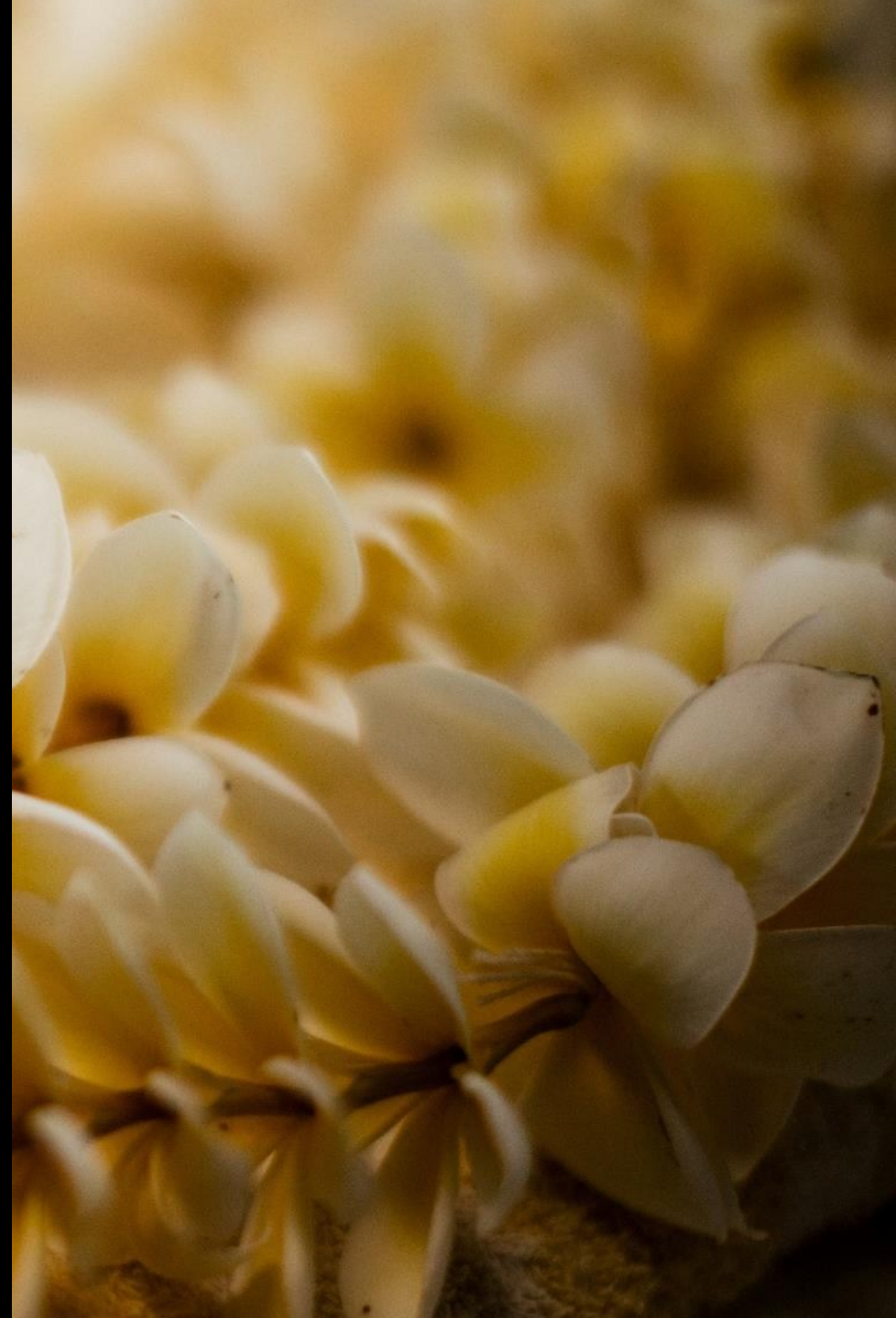
Aaron J. Salā, PhD
HVCB President & CEO



Agenda

- Market Insights
- 2025 Brand Marketing Plan
 - Target Audience
 - Advertising
 - Social Media
 - Public Relations
 - Travel Trade
- Partnership Opportunities

Jeffrey Eslinger
Senior Director
Market Insights & CRM



Market Insights – U.S. Market Situation

Economic Headwinds Impacting Travel

- **Slowing GDP Growth:** Potential for reduced discretionary spending (travel).
- **Persistent Inflation:** Eroding purchasing power, making travel more expensive.
- **Rising Interest Rates:** Increased cost of financing vacations.

Hawai'i Key Tourism Trends

- **US Remains Dominant Market:** But overall visitor numbers are softening.
- **Stable Airlift, Reduced Seat Availability:** Potential for higher prices, booking challenges for specific times of the year.
- **Honolulu: Strongest Gateway:** Continues to be the primary entry point.

Maui Recovery

- **Continued Softness:** Reduced visitation and airlift.
- **Lingering Wildfire Effects:** Impacting bookings, especially West Maui.
- **Gradual Recovery:** Requires ongoing monitoring and support.

Market Insights – U.S. Market Situation

Implications for U.S. Market

- **Potential Reduced US Visitation:** Due to economic factors
- **Increased Price Sensitivity:** Demand for value-driven travel.
- **Maui Recovery Uncertainty:** Bookings may remain below pre-wildfire levels.
- **Honolulu's Strength:** Continues to attract US travelers.
- **Importance of Monitoring:** Dynamic situation requires ongoing analysis

State of Hawai'i Market Overview – U.S. 2024P Year-to-Date

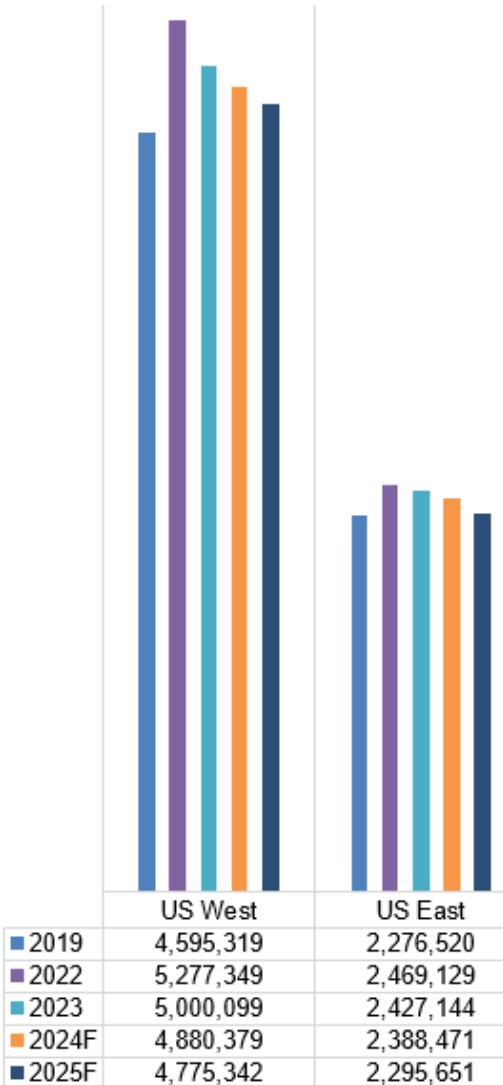
	2024P YTD	2023P YTD	% Chg. 24/23
Visitor Arrivals	7.33 million	742 million	-1.3%
Total Expenditures (\$)	\$15.7 billion	\$15.8 billion	-0.3%
PPPD Spending (\$)	\$244.4	\$238.7	+2.4%
Average Daily Census	176,409	181,612	-2.9%

State of Hawai'i Market Overview – U.S. 2025P January Year-to-Date

	2025P YTD	2024P YTD	% Chg. 25/24
Visitor Arrivals	575,641	548,664	+4.9%
Total Expenditures (\$)	\$1.41 billion	\$1.34 billion	+4.9%
PPPD Spending (\$)	\$249.4	\$243.1	+2.6%
Average Daily Census	182,855	178,732	+2.3%

Statewide visitation forecast for USW and USE will be down into 2025

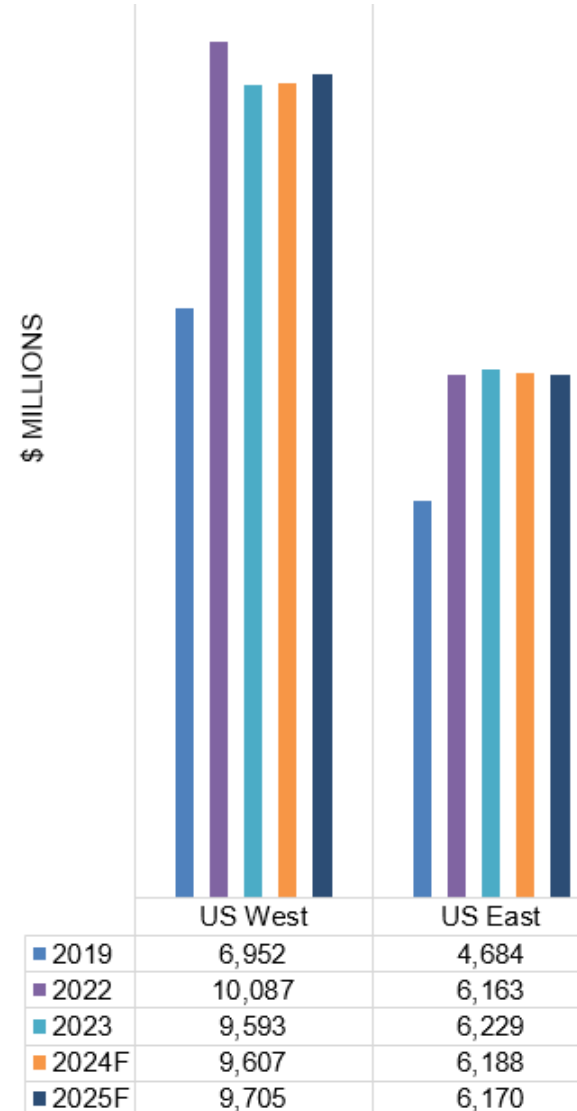
Visitation



US West
-2.2%

US East
-3.9%

Expenditures



US West
+1.0%

US East
-0.3%

U.S. Trans-pacific AIR SEAT SYNOPSIS 2023, 2024 and 2025P

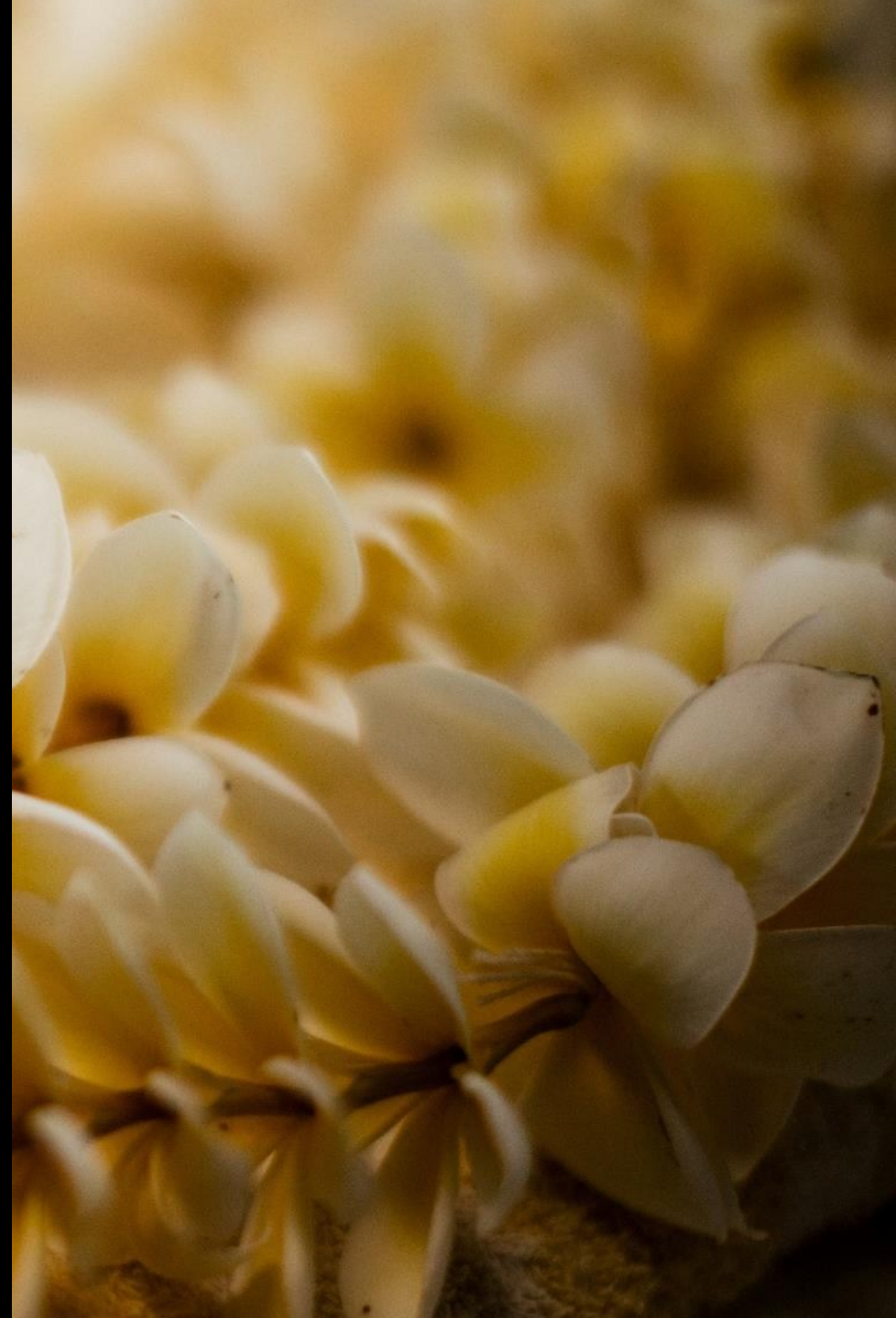
Projections as of March 2025

	# of SEATS 2023	# of SEATS 2024	# of SEATS 2025P	% Change 25/23	% Change 25/24
O'ahu	5,843,716	6,027,994	5,940,685	1.7%	-1.4%
Maui	2,723,716	2,343,773	2,258,289	-17.1%	-3.6%
Kona	1,324,361	1,268,184	1,240,405	-6.3%	-2.2%
Kaua'i	997,164	976,623	1,000,575	0.3%	2.5%
TOTAL	10,888,957	10,616,574	10,439,954	-4.1%	-1.7%

Hawai'i (All Islands) Total Room Nights Booked & Consumed & On The Books October 2024 – January 2026 YOY as of February 16, 2025

Month	February 16, 2025	February 9, 2025	February 2, 2025	January 26, 2025
October 2024	-5.5%	-5.5%	-5.4%	-5.4%
November 2024	-4.6%	-4.7%	-4.5%	-4.5%
December 2024	+1.1%	+1.1%	+1.3%	+1.3%
January 2025	-0.2%	-0.2%	0.0%	0.0%
February 2025	-0.5%	-0.5%	-0.4%	+1.3%
March 2025	-1.2%	-0.6%	+0.2%	+1.7%
April 2025	+10.9%	+10.7%	+12.5%	+13.4%
May 2025	-0.1%	+0.3%	+1.2%	+0.3%
June 2025	+13.6%	+13.8%	+16.3%	+16.5%
July 2025	+14.7%	+15.0%	+19.7%	+20.1%
August 2025	+13.6%	+15.3%	+21.4%	+23.0%
September 2025	+13.6%	+14.5%	+23.6%	+23.6%
October 2025	+22.7%	+22.8%	+33.9%	+33.1%
November 2025	+18.6%	+25.6%	+34.7%	+35.1%
December 2025	+20.0%	+24.1%	+28.4%	+28.8%
January 2026	+60.8%	+62.9%	+68.0%	-

Kara Imai
Managing Director
Marketing



2025 Brand Marketing Plan

- The Hawai'i Target Traveler
- Messaging
- Advertising
- Social Media
- Public Relations
- Travel Trade



Target Audience



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.

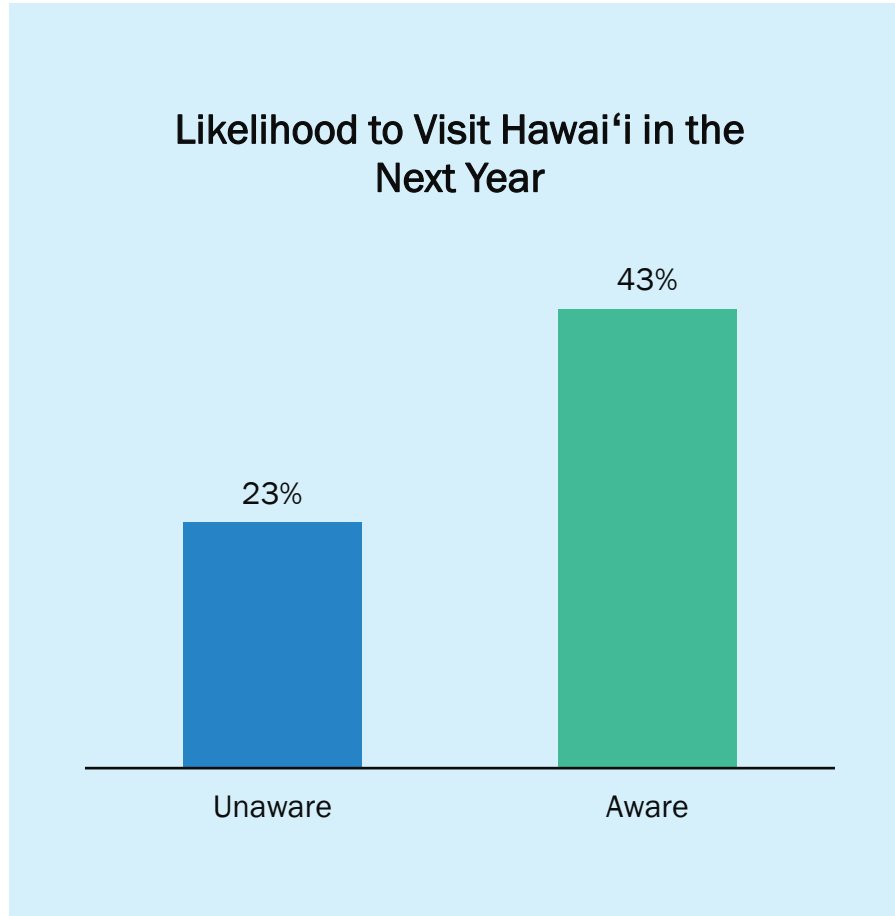
Soft Adventure

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

The People. The Place. The Hawaiian Islands.



Measuring Impact The People, The Place, The Hawaiian Islands



Key Performance Highlights

- **Strong Campaign Awareness:** Reached **49%** of targeted consumers, with higher recall in **Los Angeles (56%)**.
- **Top-Tier Creative Performance:** Consistently ranked in the **top 10%** of all destination marketing campaigns for communication effectiveness.
- **Impact on Consumer Perception:** Ads lifted perceptions of **cultural experiences, unique culinary offerings, and exciting festivals and events**.
- **Marketing Synergy Matters:** **20% of consumers** were exposed to HTA's paid, earned, and owned media, significantly increasing their likelihood to visit.
- **Future Visitation Impact:** Incremental travel increase seen, with **Maui surpassing Hawai'i Island** as the most desired destination.

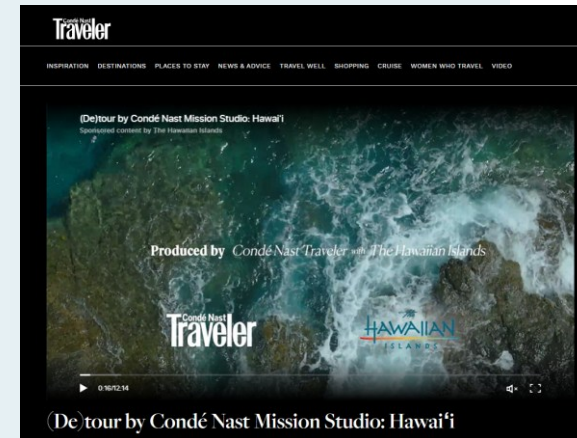
Source: HTA Campaign Effectiveness US Report, SMARInsights Jan 2025

Advertising

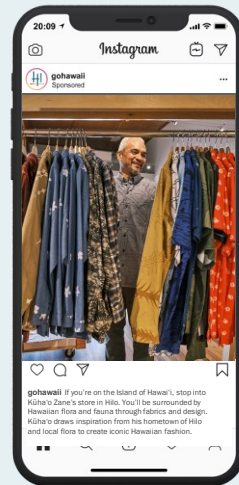
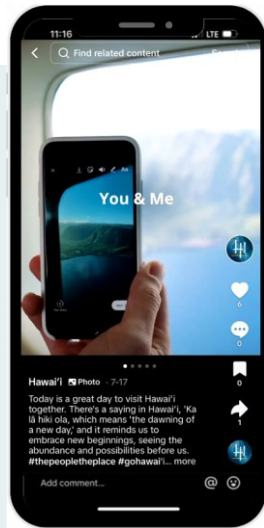
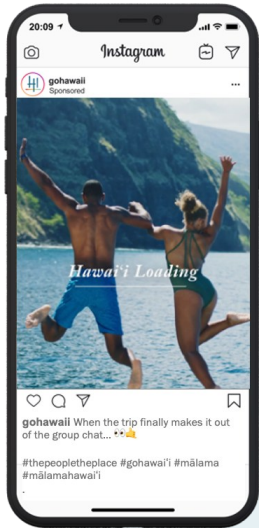
Advanced TV



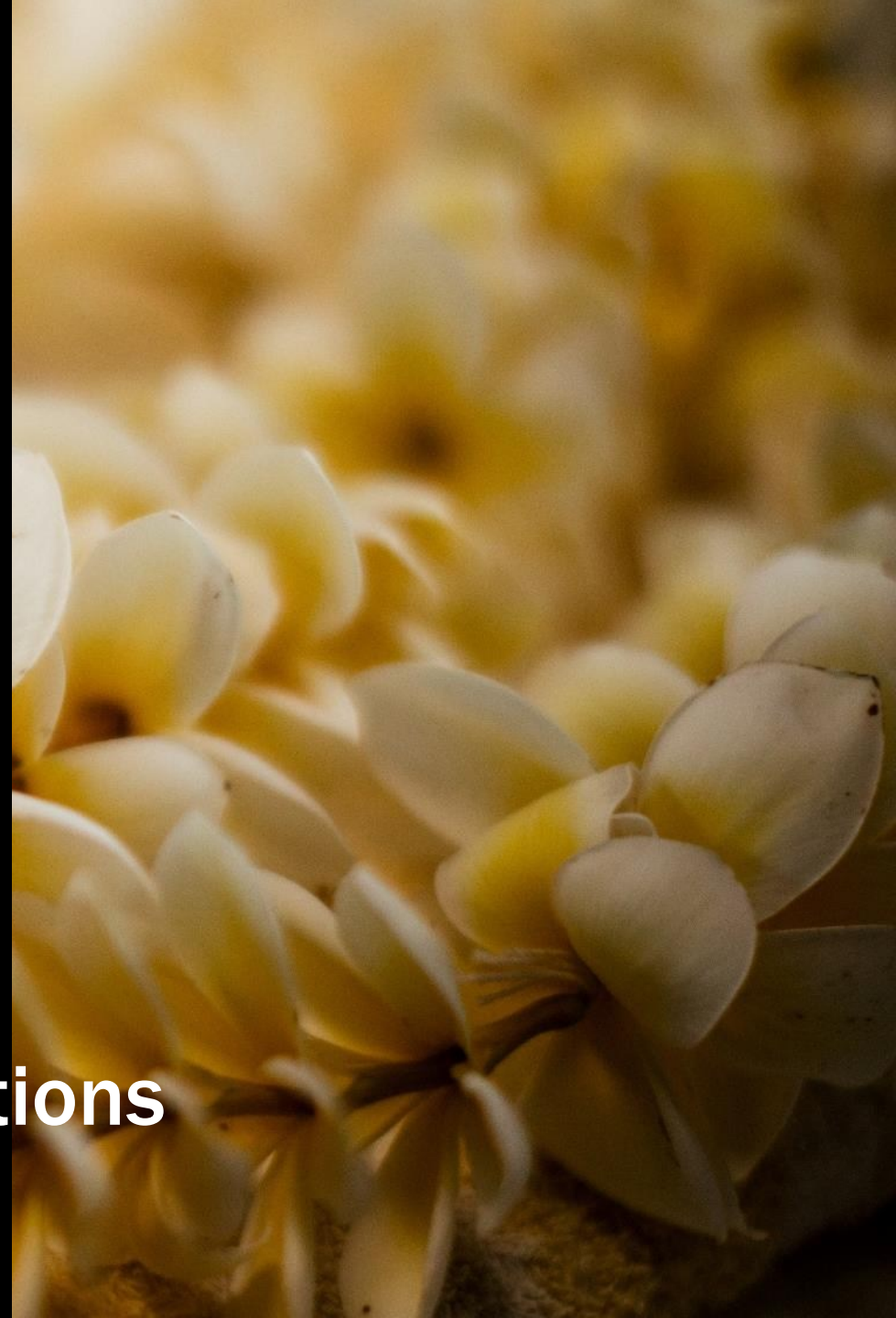
Digital Video



Social Media



Lei-Ann Field
Senior Director
Public Relations & Communications



Public Relations

Strategy and Goal

- Nurture and leverage key media relationships across the U.S. continent
- Influence and inspire editorial coverage

Collaboration Opportunities

- Compelling, people-driven story ideas
- Hosted media assistance
- Keep us apprised of your plans



08/19/2024 · EPISODE 119 · 36 MIN

Cooking With Aloha: Lee Anne Wong's
Journey from NYC to Hawai'i
[Travel With Meaning](#)

▶ Play

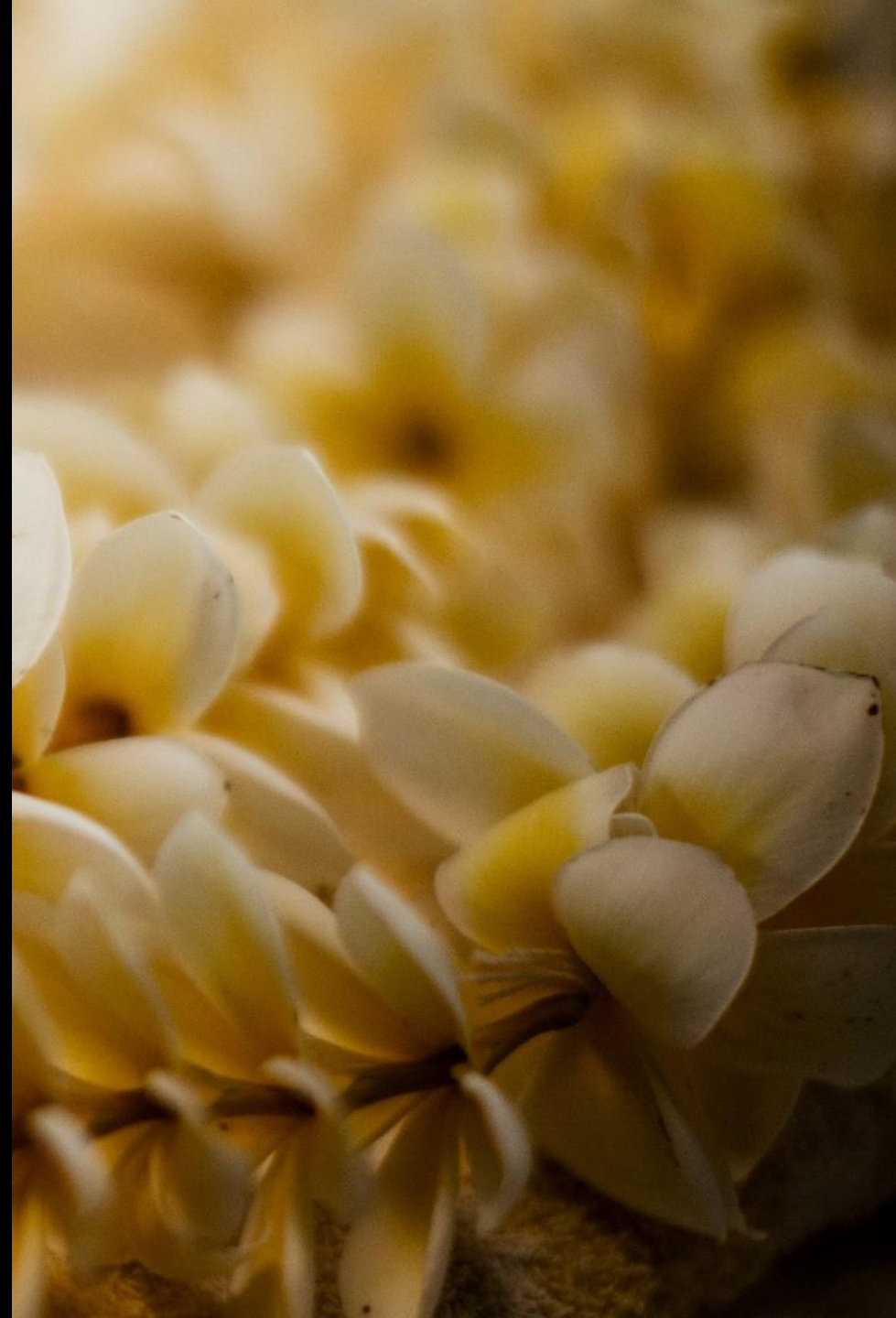
Public Relations

Programs and Tactics

- Expanded Hawai'i presence at IMM
- Media Visits
- Virtual Media Blitz (Aug.)
- Bon Appetit Magazine
 - Digital, video, social, print
- Broadcast / Streaming Video
 - 22 Feb: NBC's "1st Look" (West Maui)
 - Q2: Tastemade's "From Scratch" (Maui)



Robyn Basso
Senior Director
Travel Industry Partnerships



Travel Trade

Strategy

Leverage influential travel trade relationships to deliver destination messaging and education

Tactics

Events and Training

- Educational Blitz Events
 - April – San Francisco, San Jose, and Orange County, CA
 - October – Boston, New York, New Jersey, Philadelphia
- Wholesale, Consortia, Industry Events
- Virtual Events & Webinars
- Familiarization (FAM) Tours
 - HTUSA-led in-destination multi-island programs
 - Support for key partner-led programs
 - Meaningful FAM with Tourism Cares



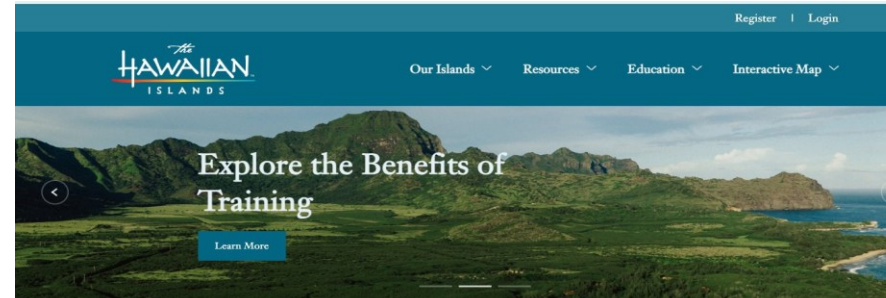
Travel Trade

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
 - Timely Updates
 - Monthly EXTP Newsletter

Trade Content Development

- Agents.GoHawaii.com
- 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 Kaua'i to spreading *aloha* with fragrant *lei* on O'ahu. From the *mālama* (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**

Partnership Opportunities



2025 PARTNERSHIP OPPORTUNITIES

HVCB Island Visitor Bureaus 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-Ann 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-Ann 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

A close-up photograph of a green leaf, showing a network of veins. The central vein is prominent and runs horizontally across the middle. Smaller veins branch off from it, creating a grid-like pattern. The leaf's surface has a subtle texture, and the lighting highlights the veins, giving them a slightly glowing appearance.

Mahala