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**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'opi'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'opi'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