





## Agenda

#### 2024 Overview

- Editorial Coverage
- Los Angeles Activation Recap

#### 2025 Plan

- Current Market Situation
- Target Audience
- Messaging
- Travel Trade
- MCI

## **Maui Recovery - PR Efforts**

## ₱ VIRTUOSO.

Finding the Heart of *Malama* on Maui after the Wildfires

Joel Centano

Arts & Culture Hotels Sustainable Travel









## 2024 Highlights

- March: Virtual Media Blitz
- Jan June: 7 additional media visits
- April: Aloha Market New York
- May:
  - Bay Area Media Blitz
  - Healdsburg Wine & Food Experience
- June: Satellite Media Tour
- September:
  - Aloha Market LA
  - Media Blitz
  - 3 additional media visits

#### TRAVEL+ LEISURE

I Visited Maui After the Devastating Wildfires — Here's How You Can Do It Respons

Locals are reimagining the Hawaiian island's travel industry.

By Leilani Marie Labong | Published on March 30, 2024









## **Editorial Coverage - Highlights**

## HAWAII

#### **Recent Big Hits**

- "36 Hours: Maui" The New York Times, Apr. 25
- "Celebrating small businesses in Maui" Good Morning America, Apr. 27
- "52 Places to Go in 2024" The New York Times, Jan. 10
- "These Are Our Favorite Places to Visit for Spring Break" –
   AFAR, Feb. 27
- "Why There Has Never Been A Better Time To Visit Hawai'i"
   Forbes, May 20
- "8 Epic Trips to Take This Summer" Sunset Magazine, May
   20
- "Is It OK to Visit Maui in 2024?" Fodor's Travel, June 4



## Forbes

#### Why There Has Never Been A Better Time To Visit Hawaii

DeMarco Williams Contributor
Forbes Travel Guide Contributor Group ©





LIVING - April 27, 2024

## Celebrating small businesses in Maui

GMA welcomes two Maui local business entrepreneurs as part of "Nation Small Business Week" to bring awareness and help small businesses.

0 × 0 ⊠





### Recent Big Hits - HVCB Generated

- "Maui Rising: The Lahaina fire and recovery" – KSTP-TV (Minneapolis), Jan. 29
- "Maui Rising: Recovering businesses" –
   KSTP-TV (Minneapolis), Feb. 1
- "Maui is on the path to rebuild and heal after the devastating wildfire that took place 7 months ago " CBS National, Mar. 26
   \*Ran 634 times across the continent, 3.2M viewers







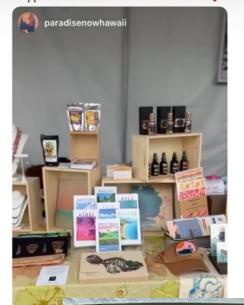
## **Sharing Aloha for Maui in Healdsburg**

- Maui Pavilion at the Healdsburg Wine & Food Experience (May 18)
  - 2,200+ high-spend attendees who travel several times a year
  - 53 media in attendance | 15 national, 38 regional
  - 28 Maui brands featured and promoted
- Maui at the Matheson Dinner
  - Fundraising dinner with live Hawaiian music
  - Featuring Chef Lee Anne Wong
- Magnum Party with Guy Fieri
  - \$85,500 raised for Maui Strong Fund





Thank you <u>@paradisenowhawaii</u> for bringing my picture book to <u>@healdsburgwineandfood</u>, and for all you do to support Maui small businesses and artists!











## **Los Angeles Market Activation** September

















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







Los Angeles Times









Los Angeles .



JustLuxe

Outside



**Public/Private Media Blitz** 



**Consumer Direct Coop Programs** 

#### **Consumer Activation**

### Aloha Market Pop-up

- Mana Up Hawai'i partnership
- Heart of Abbot Kinney Boulevard, a buzzy neighborhood with great foot traffic
- 57 Hawai'i brands, 11 from Maui
- 9,328 attendees over three days
- 31 activations included workshops, demos and panels
- VIP Receptions excited media, influencers, travel advisors, MCl clients
- Local coverage on KTLA, ABC, FOX







## **Coming Up – High-Impact Video Opportunities**

### NBC's "First Look"

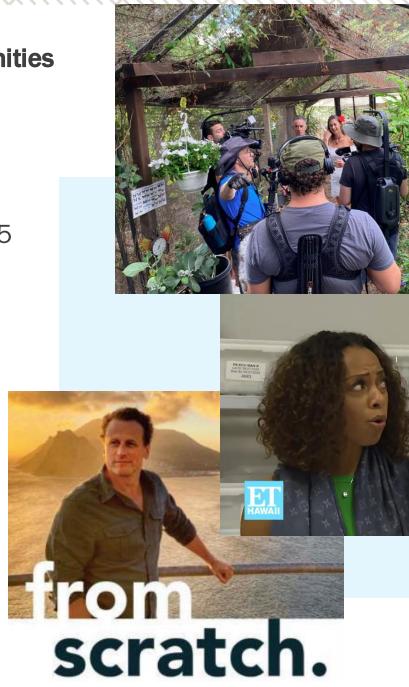
- Filmed Nov. 4 13
- Segment on West Maui to air Q1 2025

## **Entertainment Tonight**

- Filming Nov. 18 22, 2024
- Daily shows from Wailea

#### Tastemade's "From Scratch"

- Filming Dec. 2 10
- Maui episode to air Q1 or Q2 2025







## Maui Market Overview 2024 Year-to-Date through September



|                         | 2024P YTD     | 2023P YTD     | % Chg. 24/23 |
|-------------------------|---------------|---------------|--------------|
| Visitor Arrivals        | 1.73 million  | \$2.0 million | -13.1%       |
| Total Expenditures (\$) | \$3.8 billion | \$4.6 billion | -15.9%       |
| PPPD Spending<br>(\$)   | \$283.20      | \$289.20      | -2.1%        |
| Average Daily<br>Census | 50,025        | 58,453        | -14.4%       |



## **STR Hotel Performance 2024P YTD - Maui County**

| Maui County | 2024P<br>YTD | 2023<br>YTD | 2019<br>July YTD | % chg.<br>24/23 | % chg.<br>24/19 |
|-------------|--------------|-------------|------------------|-----------------|-----------------|
| Occupancy   | 62.8%        | 64.9%       | 78.3%            | -2.1%           | -15.5%          |
| ADR         | \$543.32     | \$610.39    | \$396.82         | -11.0%          | 36.9%           |
| RevPAR      | \$341.15     | \$395.86    | \$310.83         | -1.8%           | 9.8%            |

Source: HTUSA analysis of HTA/DBEDT 2024P, 2023, 2019 data

Note: 2023/2024 figures are preliminary.



## **Vacation Rental Performance 2024P YTD – Maui County**

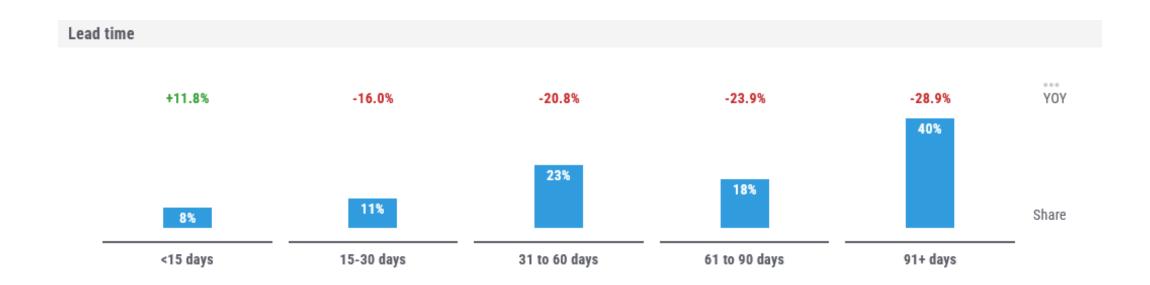
| Maui County    | 2024P<br>YTD | 2023<br>YTD | 2019<br>YTD | % chg.<br>24/23 | % chg.<br>24/19 |
|----------------|--------------|-------------|-------------|-----------------|-----------------|
| Unit Supply    | 2,194,630    | 1,873,182   | 2,328,592   | 17.2%           | -5.8%           |
| Unit Occupancy | 53.4%        | 61.4%       | 79.0%       | -13.0%          | -32.4%          |
| Unit ADR       | \$391.00     | \$373.31    | \$247.87    | 4.7%            | 57.7%           |

Source: HTUSA analysis of HTA/DBEDT 2024P, 2023, 2019 data

Note: 2023/2024 figures are preliminary.



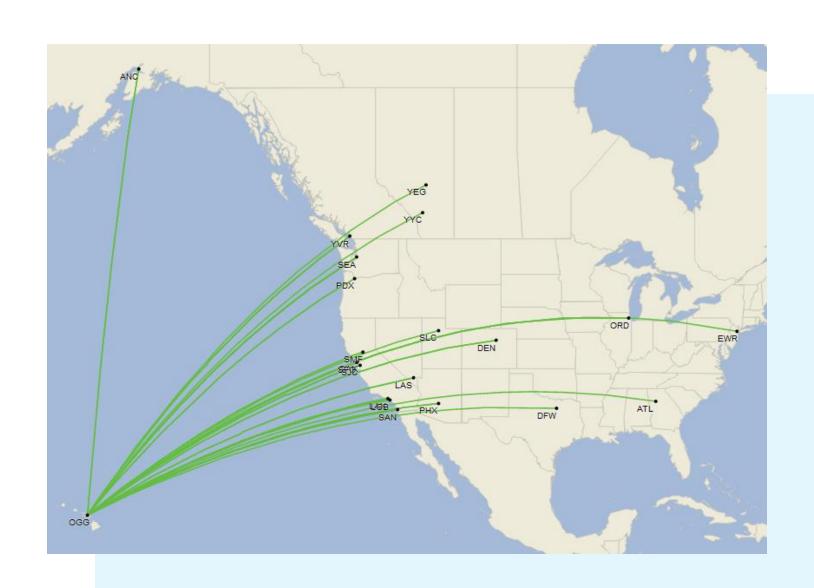
## Lead Time From Air Booking to Arrival <15 days is up 11.8% and < 60 days Represents 41% of all Air Bookings



**Lead time:** The lead time refers to the time lapse, in days, between the last ticketing transaction date (including modifications) and the arrival date.



## Non-Stop Origins into Kahului/Maui (OGG)





## Non-Stop Origins into Kahului/Maui (OGG)

Anchorage, AK, US\*

Atlanta, GA, US\*

Calgary, AB, CA\*

Chicago-O'Hare, IL, US

Dallas/Fort Worth, TX, US

Denver, CO, US

Edmonton, AB, CA\*

Las Vegas, NV, US

Long Beach, CA, US

Los Angeles, CA, US

Newark, NJ US\*

Phoenix, AZ, US

Portland, OR, US

Sacramento, CA, US

Salt Lake City, UT, US\*

San Diego, CA, US

San Francisco, CA, US

San Jose, CA, US

Seattle, WA, US

Vancouver, BC, CA



# U.S. Trans-pacific AIR SEAT SYNOPSIS forecasted forNovember through December 2024 Projections as of October 2024

|        | # of<br>SEATS<br>Nov.<br>2022 | # of<br>SEATS<br>Nov.<br>2023 | # of<br>SEATS<br>Nov.<br>2024 | %<br>Change<br>24/22 | %<br>Change<br>24/23 | # of<br>SEATS<br>Dec.<br>2022 | # of SEATS<br>Dec.<br>2023 | # of SEATS<br>Dec.<br>2024 | %<br>Change<br>24/22 | %<br>Change<br>24/23 |
|--------|-------------------------------|-------------------------------|-------------------------------|----------------------|----------------------|-------------------------------|----------------------------|----------------------------|----------------------|----------------------|
| Oʻahu  | 444,728                       | 481,846                       | 477,289                       | 7.3%                 | -0.9%                | 505,682                       | 510,722                    | 541,157                    | 7.0%                 | 6.0%                 |
| Maui   | 231,964                       | 173,190                       | 180,429                       | -22.2%               | 4.2%                 | 275,430                       | 201,505                    | 206,067                    | -25.2%               | 2.3%                 |
| Kona   | 88,383                        | 102,113                       | 99,480                        | 12.6%                | -2.6%                | 111,787                       | 116,398                    | 114,648                    | 2.6%                 | -1.5%                |
| Kaua'i | 85,895                        | 70,624                        | 76,804                        | -10.6%               | 8.8%                 | 96,191                        | 83,305                     | 87,409                     | -9.1%                | 4.9%                 |
| TOTAL  | 850,970                       | 827,773                       | 834,002                       | -2.0%                | 0.8%                 | 989,090                       | 911,930                    | 949,281                    | -4.0%                | 4.1%                 |



# U.S. Trans-pacific AIR SEAT SYNOPSIS forecasted for January through February 2025 Projections as of October 2024

|        | # of<br>SEATS<br>Jan.<br>2023 | # of<br>SEATS<br>Jan.<br>2024 | # of<br>SEATS<br>Jan.<br>2025 | %<br>Change<br>25/23 | %<br>Change<br>25/24 | # of<br>SEATS<br>Feb.<br>2023 | # of<br>SEATS<br>Feb.<br>2024 | # of<br>SEATS<br>Feb.<br>2025 | %<br>Change<br>25/23 | %<br>Change<br>25/24 |
|--------|-------------------------------|-------------------------------|-------------------------------|----------------------|----------------------|-------------------------------|-------------------------------|-------------------------------|----------------------|----------------------|
| Oʻahu  | 496,368                       | 491,840                       | 513,548                       | 3.5%                 | 4.4%                 | 444,890                       | 454,389                       | 451,878                       | 1.6%                 | -0.6%                |
| Maui   | 261,311                       | 201,187                       | 196,032                       | -25.0%               | -2.6%                | 232,918                       | 182,848                       | 173,497                       | -25.5%               | -5.1%                |
| Kona   | 107,988                       | 108,307                       | 111,818                       | 3.5%                 | 3.2%                 | 98,060                        | 97,150                        | 95,257                        | -2.9%                | -1.9%                |
| Kaua'i | 85,253                        | 78,215                        | 80,210                        | -5.9%                | 2.6%                 | 73,480                        | 70,151                        | 69,172                        | -5.9%                | -1.4%                |
| TOTAL  | 950,920                       | 879,549                       | 901,608                       | -5.2%                | 2.5%                 | 849,348                       | 804,538                       | 789,804                       | -7.0%                | -1.8%                |



# U.S. Trans-pacific AIR SEAT SYNOPSIS forecasted for March through April 2025 Projections as of October 2024

|        | # of<br>SEATS<br>March<br>2023 | # of<br>SEATS<br>March<br>2024 | # of<br>SEATS<br>March<br>2025 | %<br>Change<br>25/23 | %<br>Change<br>25/24 | # of<br>SEATS<br>April<br>2023 | # of<br>SEATS<br>April<br>2024 | # of<br>SEATS<br>April<br>2025 | %<br>Change<br>25/23 | %<br>Change<br>25/24 |
|--------|--------------------------------|--------------------------------|--------------------------------|----------------------|----------------------|--------------------------------|--------------------------------|--------------------------------|----------------------|----------------------|
| Oʻahu  | 506,234                        | 523,013                        | 561,405                        | 10.9%                | 7.3%                 | 468,869                        | 495,638                        | 508,852                        | 8.5%                 | 2.7%                 |
| Maui   | 282,680                        | 211,243                        | 225,591                        | -20.2%               | 6.8%                 | 240,851                        | 188,255                        | 196,670                        | -18.3%               | 4.5%                 |
| Kona   | 118,936                        | 108,178                        | 107,018                        | -10.0%               | -1.1%                | 105,290                        | 97,310                         | 102,939                        | -2.2%                | 5.8%                 |
| Kaua'i | 91,815                         | 79,934                         | 83,788                         | -8.7%                | 4.8%                 | 88,569                         | 75,096                         | 81,952                         | -7.5%                | 9.1%                 |
| TOTAL  | 999,665                        | 922,368                        | 977,802                        | -2.2%                | 6.0%                 | 903,579                        | 856,299                        | 890,413                        | -1.5%                | 4.0%                 |



# West Maui Total Room Nights Booked & Consumed & On The Books January 2024 - December 2024 CY vs 2022 as of November 3, 2024

| Month          | November 3, 2024 | October 27, 2024 | October 20, 2024 | October 13, 2024 |
|----------------|------------------|------------------|------------------|------------------|
| January 2024   | +48.8%           | +48.8%           | +50.7%           | +50.7%           |
| February 2024  | +42.9%           | +42.9%           | +44.9%           | +44.9%           |
| March 2024     | +15.5%           | +15.5%           | +16.9%           | +16.9%           |
| April 2024     | +2.9%            | +2.9%            | +4.3%            | +4.3%            |
| May 2024       | +2.1%            | +2.1%            | +3.7%            | +3.7%            |
| June 2024      | -20.8%           | -20.8%           | <b>-19.1</b> %   | -19.1%           |
| July 2024      | -23.5%           | -23.5%           | <b>-21.9%</b>    | <b>-21.9%</b>    |
| August 2024    | -31.1%           | <b>-31</b> .1%   | -29.7%           | -29.7%           |
| September 2024 | -29.0%           | -29.0%           | -27.8%           | -27.8%           |
| October 2024   | -27.9%           | 28.0%            | -27.4%           | -28.0%           |
| November 2024  | -22.4%           | -35.3%           | -37.7%           | -43.2%           |
| December 2024  | -33.6%           | -37.7%           | -40.5%           | -44.4%           |
|                |                  |                  |                  |                  |

Source: HVCB analysis of TravelClick Data



## Maui Total Room Nights Booked & Consumed & On The Books January 2024 - December 2024 CY vs 2022 as of November 3, 2024

| Month          | Nevember 2, 2004 | October 27, 2024 | Optobox 20, 2024 | October 13, 2024 |
|----------------|------------------|------------------|------------------|------------------|
| Monin          | November 3, 2024 | October 27, 2024 | October 20, 2024 | October 13, 2024 |
| January 2024   | +29.9%           | +29.9%           | +30.8%           | +30.8%           |
| February 2024  | +21.0%           | +21.0%           | +21.9%           | +21.9%           |
| March 2024     | +5.5%            | +5.5%            | +6.2%            | +6.2%            |
| April 2024     | +4.1%            | +4.1%            | +4.8%            | +4.8%            |
| May 2024       | -2.5%            | -2.5%            | -1.7%            | -1.7%            |
| June 2024      | -15.2%           | -15.2%           | -14.3%           | -14.3%           |
| July 2024      | -12.8%           | -12.8%           | -12.0%           | -12.0%           |
| August 2024    | -17.6%           | -17.6%           | -16.9%           | -16.9%           |
| September 2024 | -17.6%           | -17.6%           | -16.9%           | -16.9%           |
| October 2024   | -15.3%           | -15.5%           | -15.7%           | -16.7%           |
| November 2024  | -13.4%           | <b>-23</b> .1%   | -27.0%           | -32.7%           |
| December 2024  | -24.8%           | -29.0%           | -32.3%           | -36.4%           |
| December 2024  | -24.0%           | -27.0%           | -32.3%           | -30.4%           |



### **Audiences**





HAWAI'I 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 Hawai'i's natural resources, advocating for sustainability and responsible tourism.

#### Kia'i Aloha - Guardians of Aloha

Strive to maintain the spirit of aloha.



HAWAI'I 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 Evolution**



#### Statewide and Maui Recovery















































New Campaign:

The People, The Place, Welcomes You





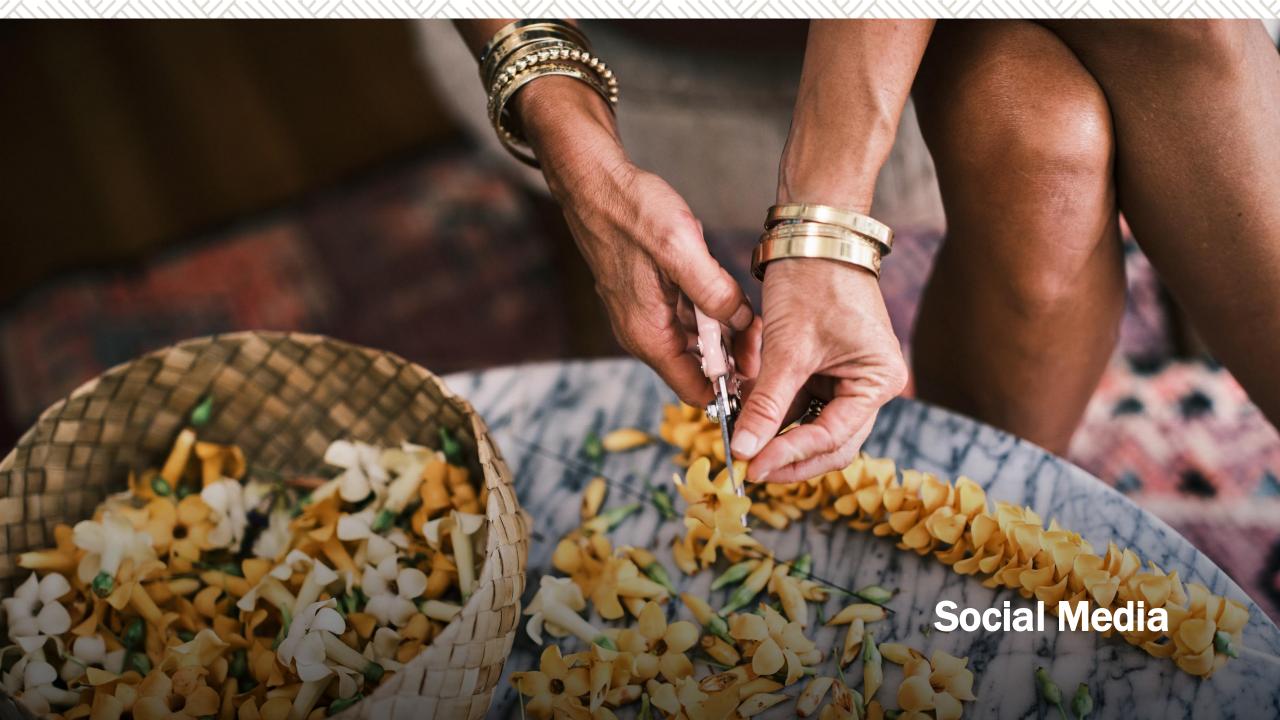
The People
The Place
The Hawaiian Islands

























Deep dive into our ambassadors and their craft.

Showing ambassadors in their element. Showcasing their work and how rooted they are within our communities.



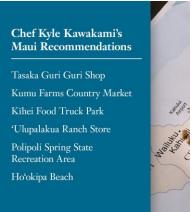


## **MARK THE MAP**

As ambassadors, they know the things that make Hawai'i so special, let's share them with the world.

Chef Kyle reveals the Maui spots he treasures most and is eager to share with visitors.







#### **Social Posts**



## LANI & KAI (SKY & SEA)

'Astro tourism' and 'eco diving' took the top two spots on Conde Nast's <u>Biggest Travel Trends to Expect in 2024</u>.

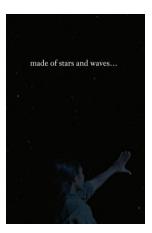
Maui offers both in astronomical proportions, with world-class snorkeling and diving at Molokini Crater, and Instagrammable sunrises at Haleakalā.

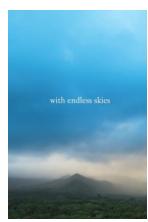
There are endless wonders home to Maui that let travelers take in the sea and sky. For this campaign, we were one of the first brands on-trend, focusing on these two areas. We use buzzwords like "Astro tourism" (nature-based travel focused on viewing the cosmos), but also expanded our offerings to be inclusive of beach days, sunrise hikes, and cruising along the Kīhei coastline.

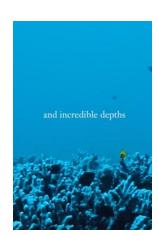
These two places, *Lani* & *Kai*, also give us an opportunity to speak to conservation, and put importance on preserving reefs and parks as you visit.

Voyage where the sky & sea meet.















#### **Social Posts**



## STATUS UPDATE

Clearly (and socially) communicating to potential travelers that Maui is open with plenty of adventures to share.

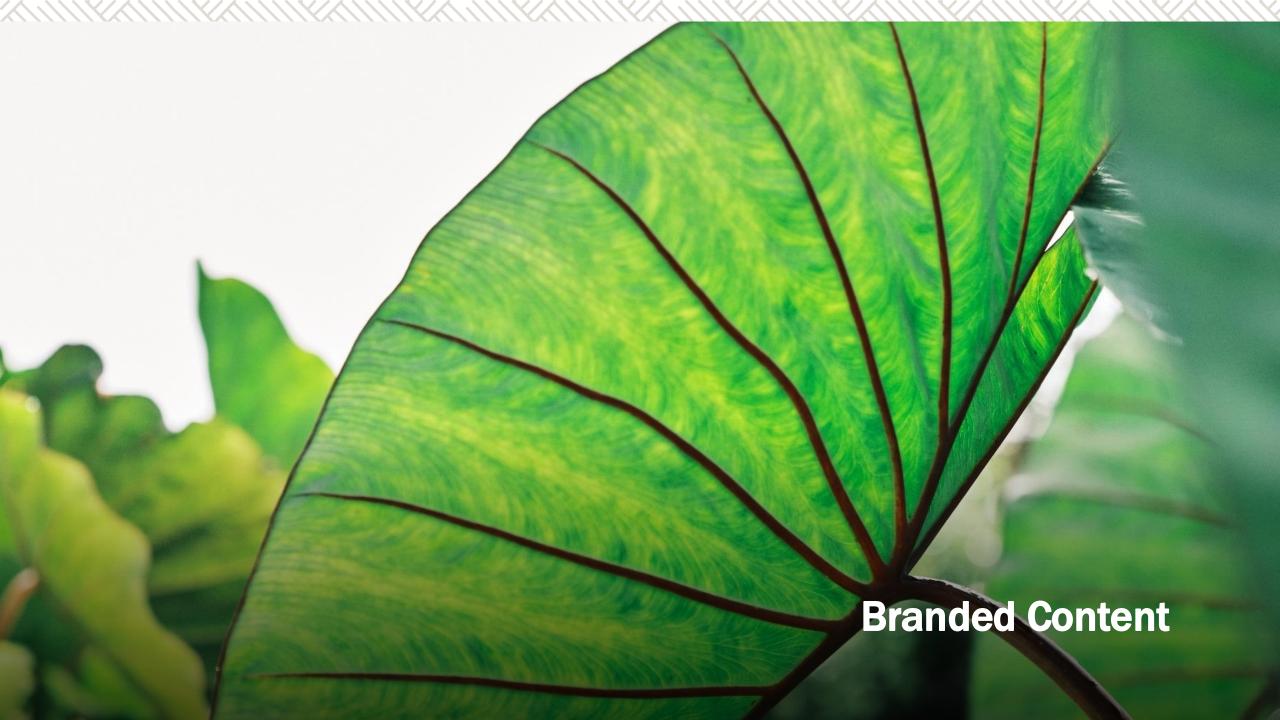
Maui is a social and friendly island, so this campaign shifted the current perspective of a 'closed' Maui and verify that the island offers tons of places to go and activities to do.

Feed-worthy photos and experiences showcased the heart and soul of local businesses. This series inspires travelers to have a more authentic trip with local charm, and book confidently.

At every step, we urged travelers to become digital storytellers, sharing their Maui adventures online by tagging local gems and sharing the #MālamaMaui hashtag.

Share the huaka'i (adventure).





## **Branded Content Programs Condé Nast Traveler**











# **Branded Content Programs Condé Nast Traveler**

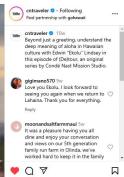
- Ekolu Lindsey VP, Kipuka Olowalu
- Kamahiwa Kawa'a Hawaiian Culture Manager formerly at Fairmont Kea Lani
- Lisa Paulson Former Executive Director, Maui Hotel & Lodging Association
- Vene Chun Hawaiian Cultural Advisor, Makoa Quest
- Yeshua Goodman Founder and Chef, Kiawe Outdoor
- Anna Kahalekulu Founder and Designer, Kulua

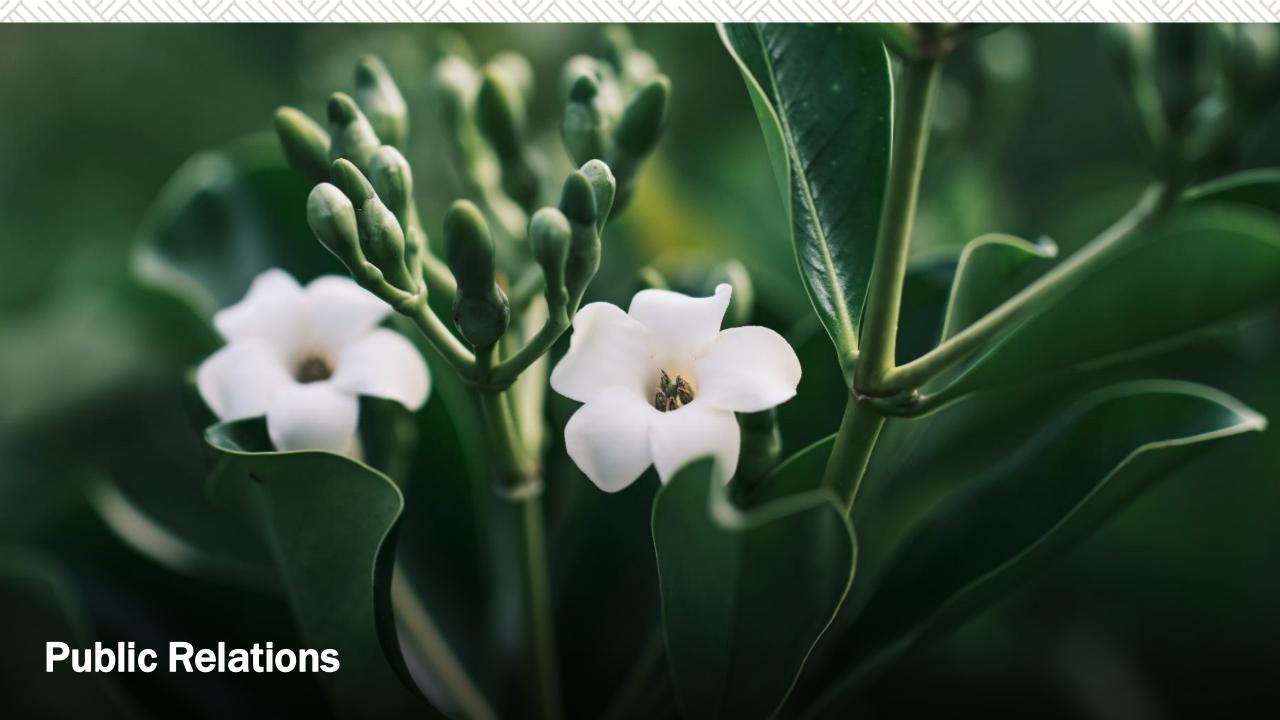












## **Public Relations**

## 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





## Why There Has Never Been A Better Time To Visit Hawaii



#### 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







## **Programs and Tactics**

- Expanded Hawai'i presence at IMM
  - Jan. 22-23, 2025, New York
- Media Appointments
  - Coordinated with Travel Trade Educational Blitz
- Virtual Media Blitz
- Seek Broadcast opportunities
  - Q1: NBC's First Look (West Maui)
  - Q2: Tastemade's From Scratch











## **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 Southern California Markets
- o Wholesale, Consortia, Industry Events
- o Familiarization (FAM) Tours
  - HTUSA-led in-destination multi-island programs
  - Support for key partner-led programs
  - Tourism Cares Meaningful FAM Maui-focused











## 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

- o Agents.GoHawaii.com
- Curriculum update of the Hawai'i Destination Specialist Program
- Supported by Destination Education Team





#### 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'atina (local residents). From the melodic sounds of Hawaiian music on Kaua'i to spreading aloha with fragrant lei on O'shan. From the mallama (care) of Native Hawaiian knowledge on the island of Hawaii to usuif 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.













Laurie Wong Ihara
Sr. Director of Sales
Single Property - Hawai'i



Regional Director Mid-West, Canada



Meredith Parkins
Regional Director
Eastern Region, Europe



Marykay Lui Regional Director Western Region

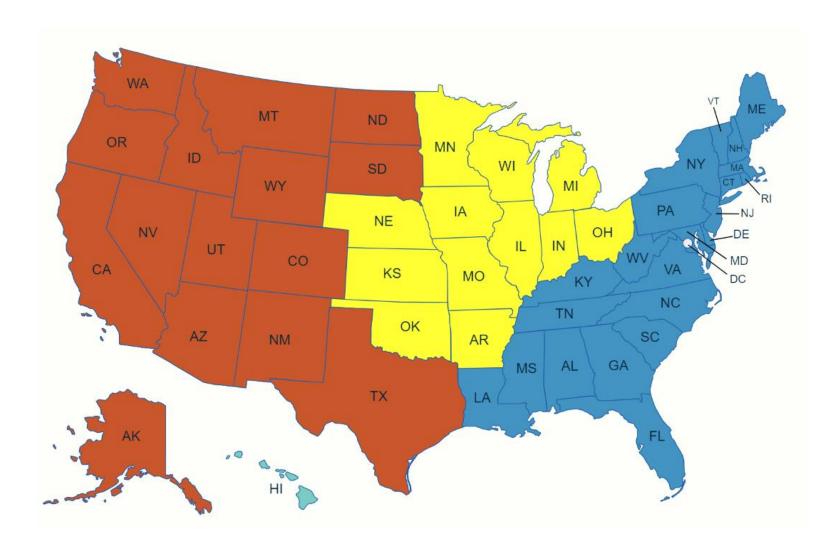








## **Single Property Team**





#### Sales

## Laurie

#### Laurie Ihara

Senior Director of Sales lihara@hvcb.org

#### Man Regi

#### Marykay Lui

Regional Director of Sales mlui@hvcb.org

#### Kathy Dever



Regional Director of Sales kdever@hvcb.org

#### Meredith Parkins

Regional Director of Sales mparkins@hvcb.org

#### Sales & Services

#### Karla Sison

Sales Coordinator ksison@hvcb.org

#### Josette Murai

Senior Manager, Sales Administration jmurai@hvcb.org

#### Lee Conching

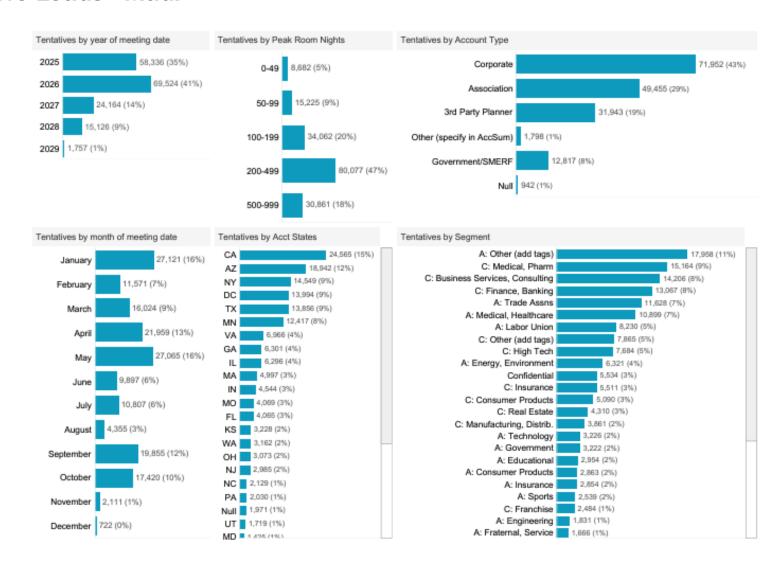
Director, Client Services lconching@hvcb.org

## 'Elele Program

Debbie Zimmerman dzimmerman@meethawaii.com

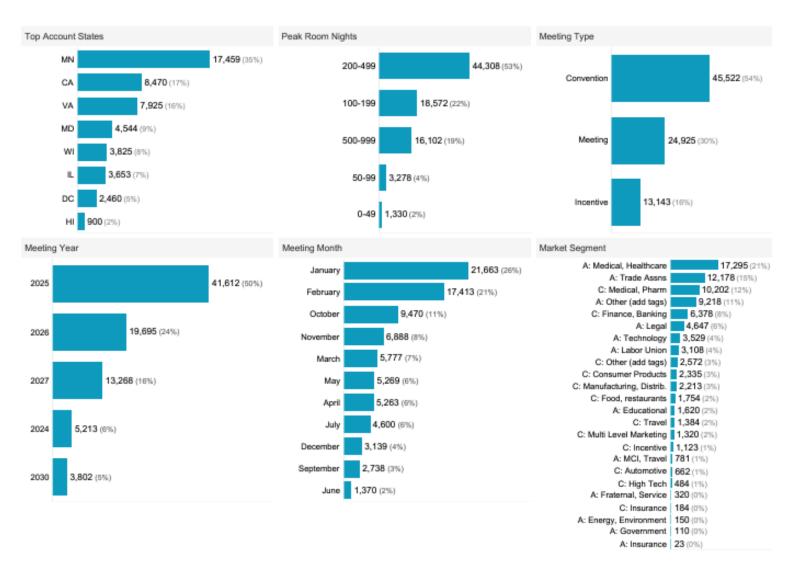
## Meet HAWAI'I

## **Current Tentative Leads - Maui**





## **Profile of Future Definite Meetings - Maui**





## Messaging



Linked-in – premier platform for business networking and outreach to meeting planners

