

**The People. The Place. The Hawaiian
Islands.**

April 25, 2024



CORE SEGMENT

**The Mindful
Hawai'i Target Traveler**

SUB-SEGMENTS



The Eco-Conscious



**The Culturally
Curious**

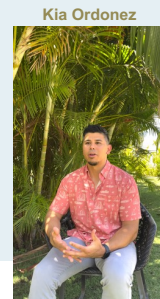
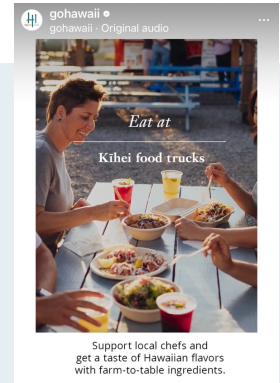
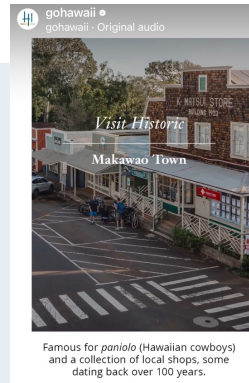
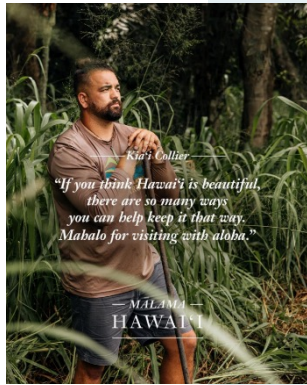


The Service-Minded



**The Unobtrusive
Explorer**

Mālama Hawai'i Messaging



Mālama Maui

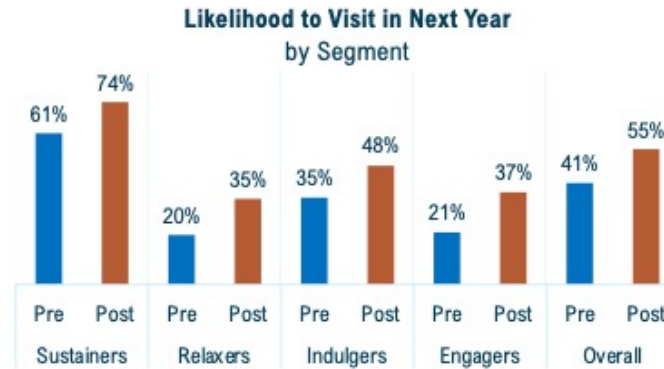
Reaction to Videos

Jan 2023

Impact of Videos

Overall, likelihood to visit increased 14 points after viewing the videos.

Sustainers are the most likely to visit and represent the core of the target market.



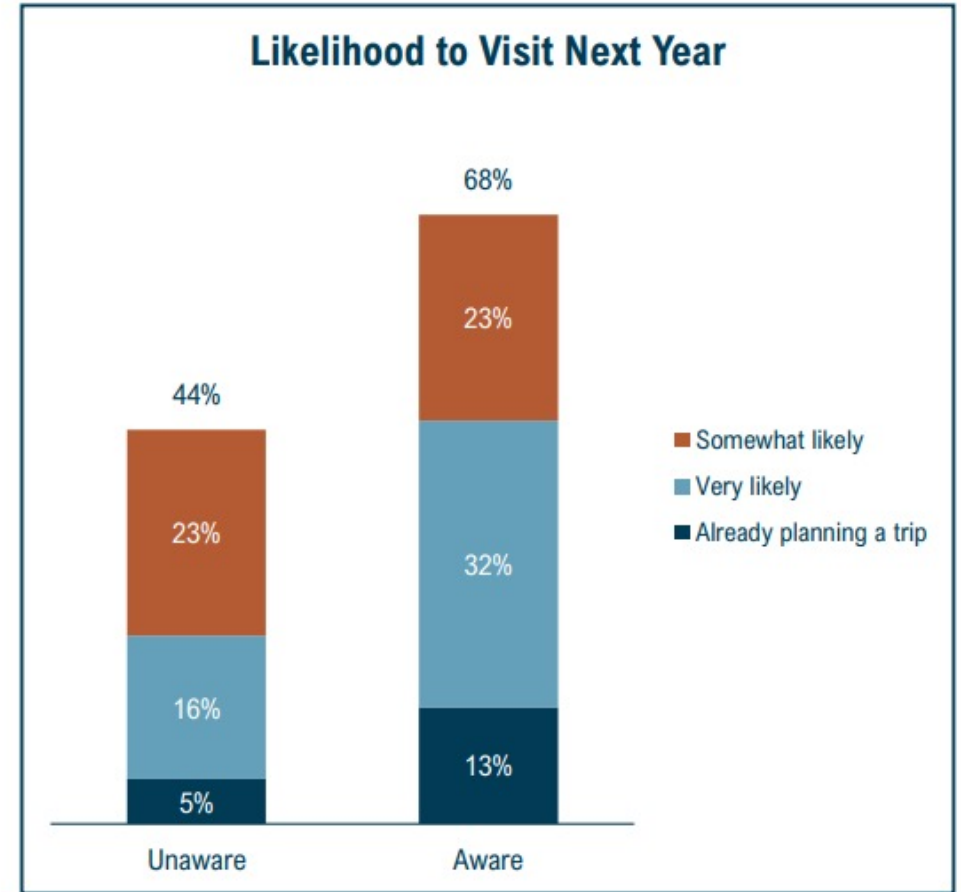
Calculated likelihood – 100% of already planning, 80% of very likely & 20% of somewhat likely

Lift in Likelihood to Visit

Oct – Dec 2023

The ultimate measure of impact or effectiveness will be an incremental travel metric (influenced trips and spending). Our best proxy in the meantime for the impact of the campaign is ad-aware lift in likelihood to visit. For Q4, that lift is 24 points (somewhat and very likely and already planning a trip).

- While not directly projectable into impacts, this large lift in likelihood foreshadows an excellent performance in advertising effectiveness and influenced trips in the final travel wave.



Hotel Booking Pace – All Islands

Hawai'i (All Islands) Total Room Nights Booked & Consumed & On The Books
January 2024 - March 2025 YOY as of April 14, 2024

Month	State of Hawai'i	O'ahu	Maui	West Maui	Kaua'i	Island of Hawai'i
January 2024	+4.9%	+7.2%	+1.8%	-5.4%	+5.2%	-1.7%
February 2024	+4.6%	+5.6%	-0.1%	-0.1%	+12.3%	+2.3%
March 2024	-1.3%	-0.6%	-2.5%	-4.4%	+1.2%	-4.9%
April 2024	-0.9%	-1.7%	+3.8%	-7.6%	-0.7%	-3.7%
May 2024	-2.2%	+2.9%	-20.4%	-30.0%	+9.2%	-7.5%
June 2024	-4.1%	-2.0%	-18.8%	-27.2%	+7.1%	+3.4%
July 2024	-1.4%	+4.1%	-22.2%	-27.9%	+26.9%	-11.3%
August 2024	+1.0%	+7.6%	-22.8%	-31.1%	+21.8%	-9.4%
September 2024	-11.5%	-5.3%	-31.2%	-49.9%	-2.1%	-18.3%
October 2024	-9.9%	-4.1%	-32.1%	-32.8%	+10.1%	-14.6%
November 2024	-7.6%	+0.8%	-28.0%	-30.7%	-7.1%	+7.8%
December 2024	-1.9%	+16.7%	-31.1%	-42.3%	-2.3%	+3.1%
January 2025	+5.3%	+43.3%	-21.6%	-41.1%	-33.0%	+22.5%
February 2025	0.0%	+55.4%	-35.8%	-46.6%	+12.5%	-14.2%
March 2025	+3.5%	+91.8%	-26.4%	-42.7%	-12.7%	-56.4%

Hotel Booking Pace – State of Hawai‘i – Time Series

Hawai‘i (All Islands) Total Room Nights Booked & Consumed & On The Books
January 2024 - March 2025 YOY as of April 14, 2024

Month	April 14, 2024	April 7, 2024	March 31, 2024	March 24, 2024
January 2024	+4.9%	+5.0%	+5.0%	+4.2%
February 2024	+4.6%	+4.6%	+4.6%	+4.1%
March 2024	-1.3%	-1.3%	-1.3%	-2.1%
April 2024	-0.9%	-0.2%	+0.0%	-3.2%
May 2024	-2.2%	-1.5%	-2.4%	-2.7%
June 2024	-4.1%	-3.5%	-4.7%	-5.1%
July 2024	-1.4%	-1.3%	-0.2%	-1.5%
August 2024	+1.0%	+1.5%	+2.2%	-0.4%
September 2024	-11.5%	-11.1%	-10.2%	-11.8%
October 2024	-9.9%	-9.7%	-9.8%	-11.7%
November 2024	-7.6%	-8.4%	-8.5%	-12.6%
December 2024	-1.9%	-3.2%	-3.2%	-9.5%
January 2025	+5.3%	+11.6%	+2.9%	-0.6%
February 2025	0.0%	-0.7%	-13.4%	-16.6%
March 2025	+3.5%	+7.0%	-28.3%	-



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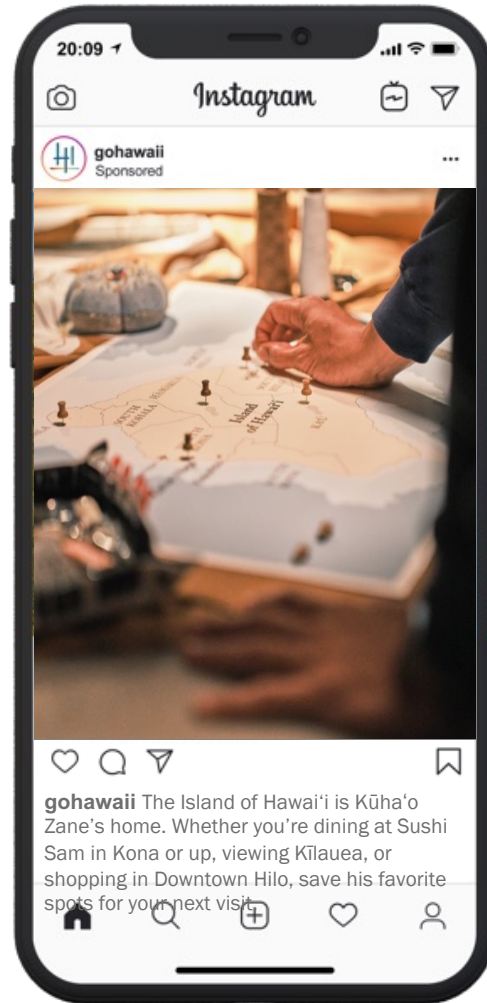






Social Posts – Mark the Map

Kūha‘o Zane



Social Posts

Maui Fresh Streatery



A close-up photograph of a green leaf, showing the intricate network of veins. The veins are a vibrant green color, contrasting with the darker green of the leaf's surface. The lighting is soft, highlighting the texture and structure of the leaf's vascular system.

Mahala