



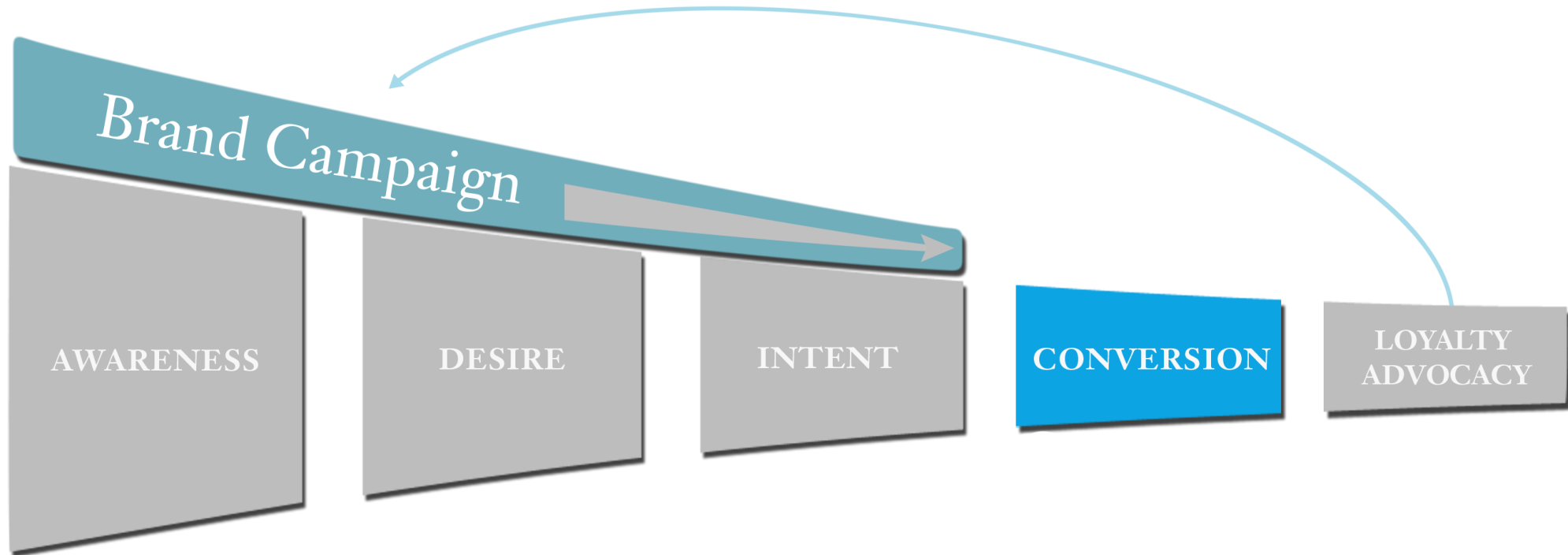
Maui County Council

November 29, 2016

Breaking through the Noise



Destination Marketing



Market Situation



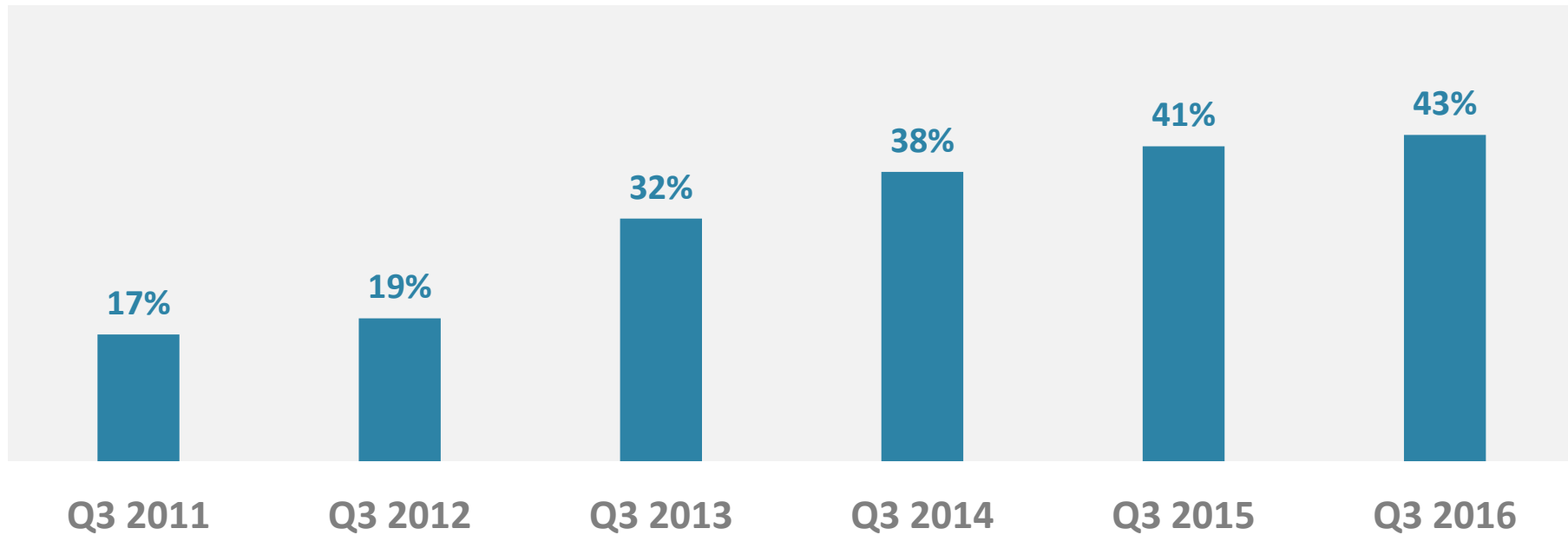
The
HAWAIIAN
ISLANDS

U.S. Domestic Travel Forecast

	2015	2016F	2017F
Spending	+2.7%	+2.8%	+2.8%
Person Trips	+3.3%	+1.8%	+1.5%

Leisure Travel Demand

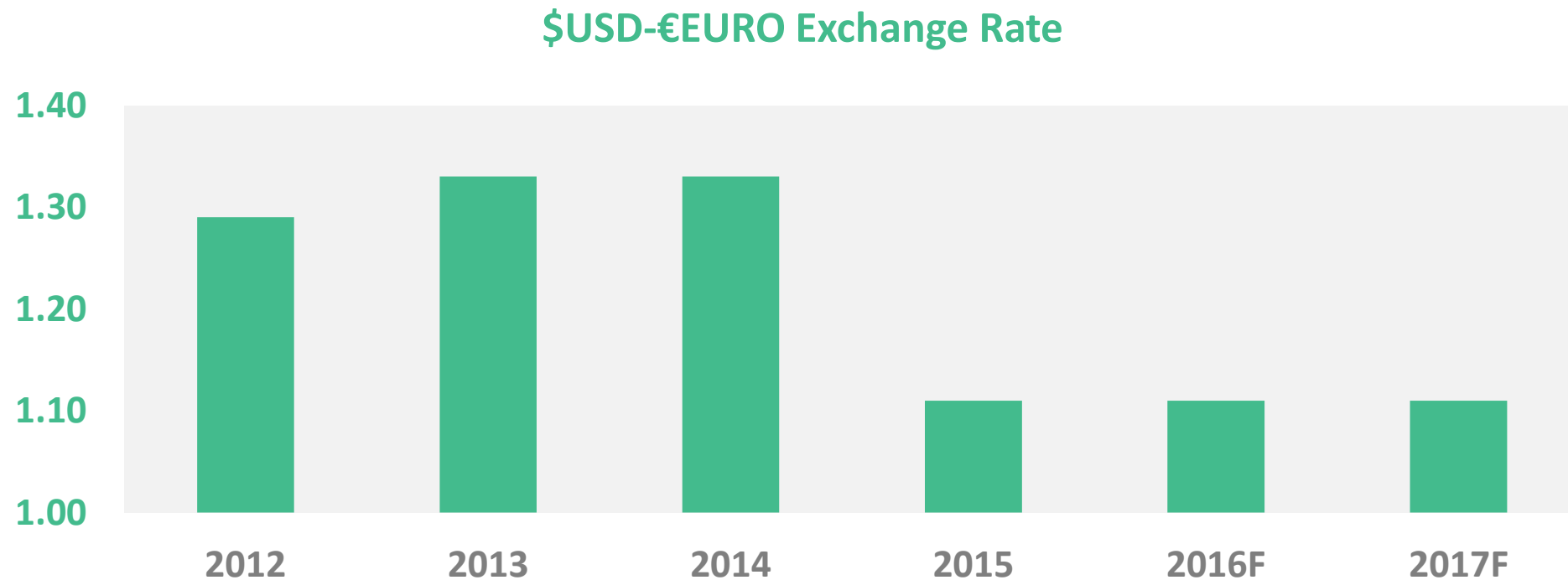
Percent U.S. Air Leisure Travelers
Very/Extremely Likely to Visit Hawai'i in Next 24 Months



Source: MMGY Global travelhorizons

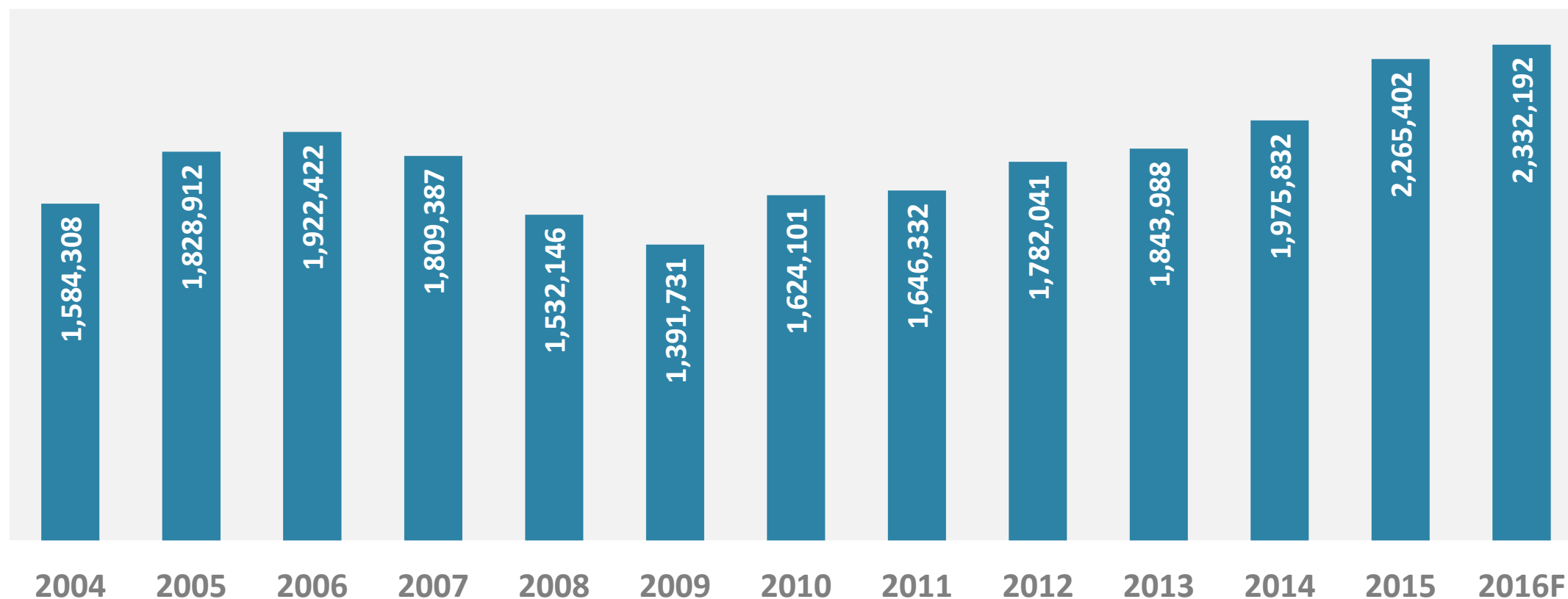


Exchange Rate



Source: Economist Intelligence Unit

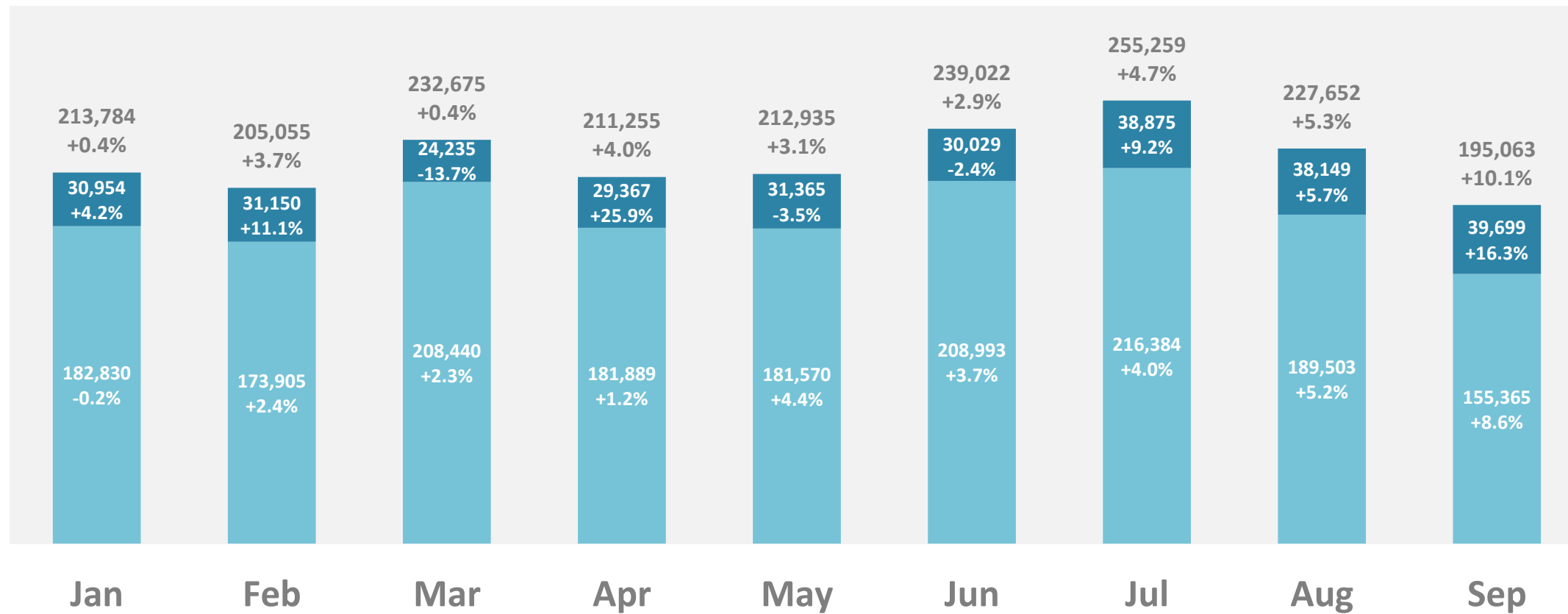
Scheduled Nonstop Air Seats to Maui from U.S. & Canada



Source: Diio Mi

Maui Visitor Arrivals 2016 YTD

■ NA Total ■ Other International



Source: Hawai'i Tourism Authority

Understanding the Target Market



The
HAWAIIAN
ISLANDS

Identifying the Target Market

Studied past visitors



```
graph TD; A[Studied past visitors] --> B[High satisfaction = high likelihood to return, spend, etc.]; B --> C[Created profiles of those we'd like to 'invite back']
```

High satisfaction = high likelihood to return, spend, etc.

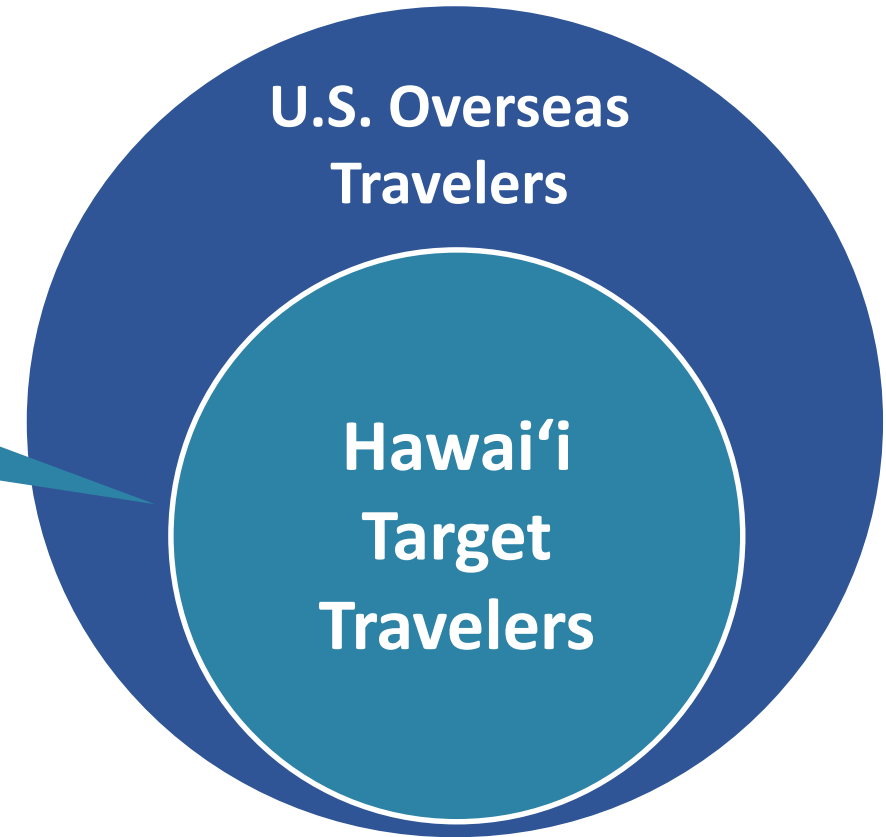
Created profiles of those we'd like to 'invite back'

The Hawai'i Target Traveler

Hawai'i Target Traveler (HTT)

American overseas travelers who are extremely/very interested in visiting Hawai'i and likely to visit within 5 years.

= 50.9% of all U.S. Overseas Travelers

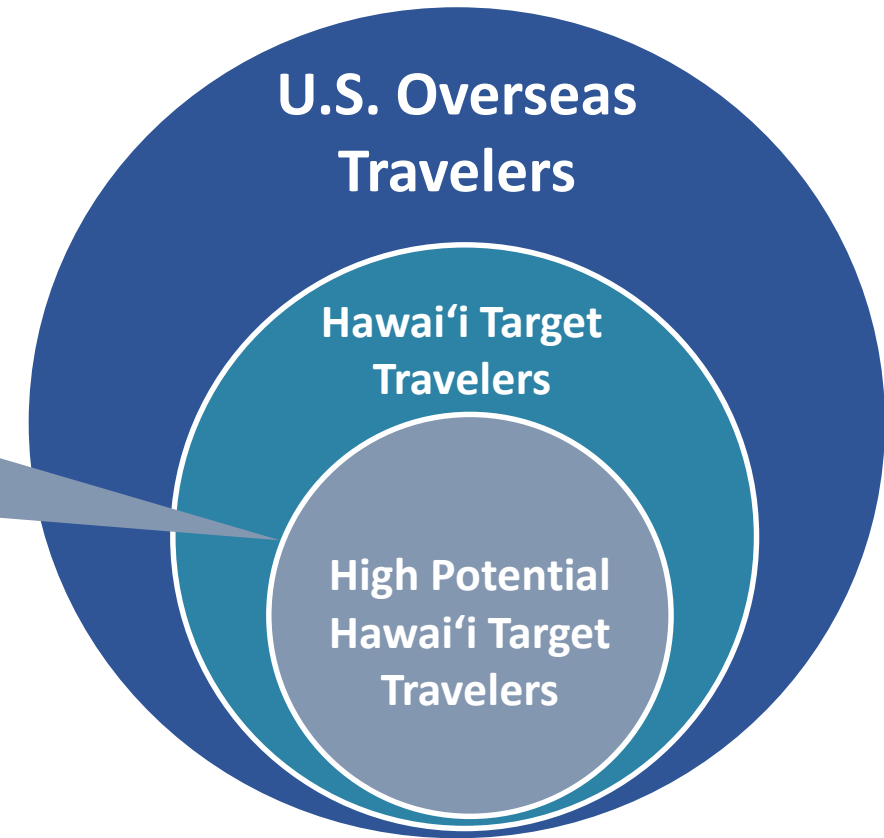


Combating the Recession with High Potential HTT

High Potential HTT

Higher income, less price sensitive travelers, likely to visit Hawai'i within two years, in major airline hub markets

= 16% of all Hawai'i Target Travelers



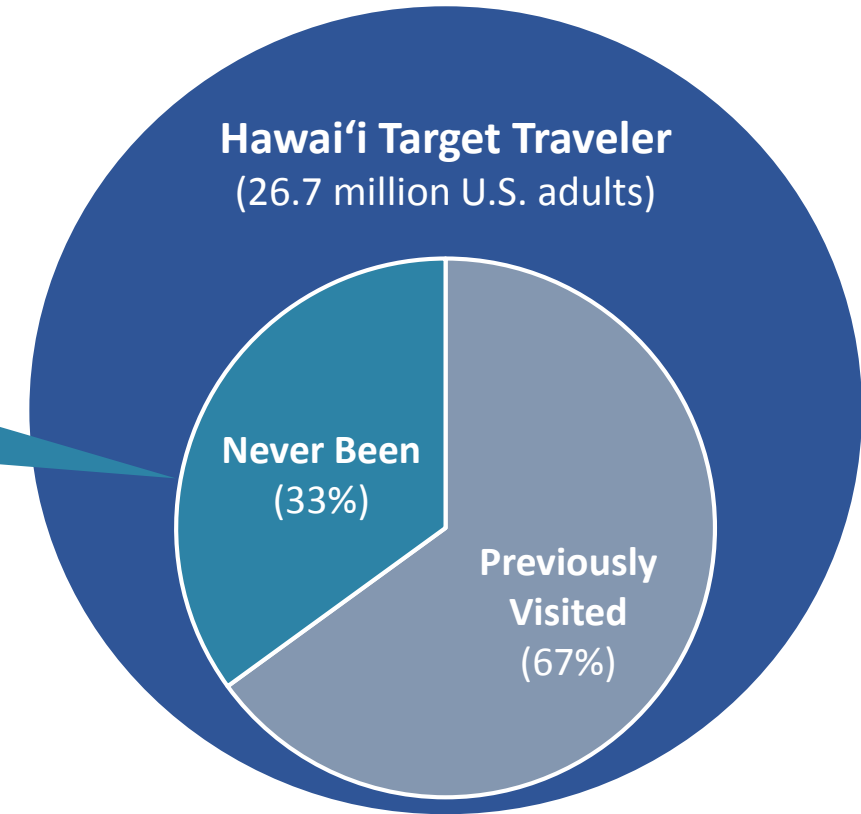
Hawai'i Target Traveler Never Beens

U.S. Overseas Travelers
(50.0 million U.S. adults)

HTT Never Beens

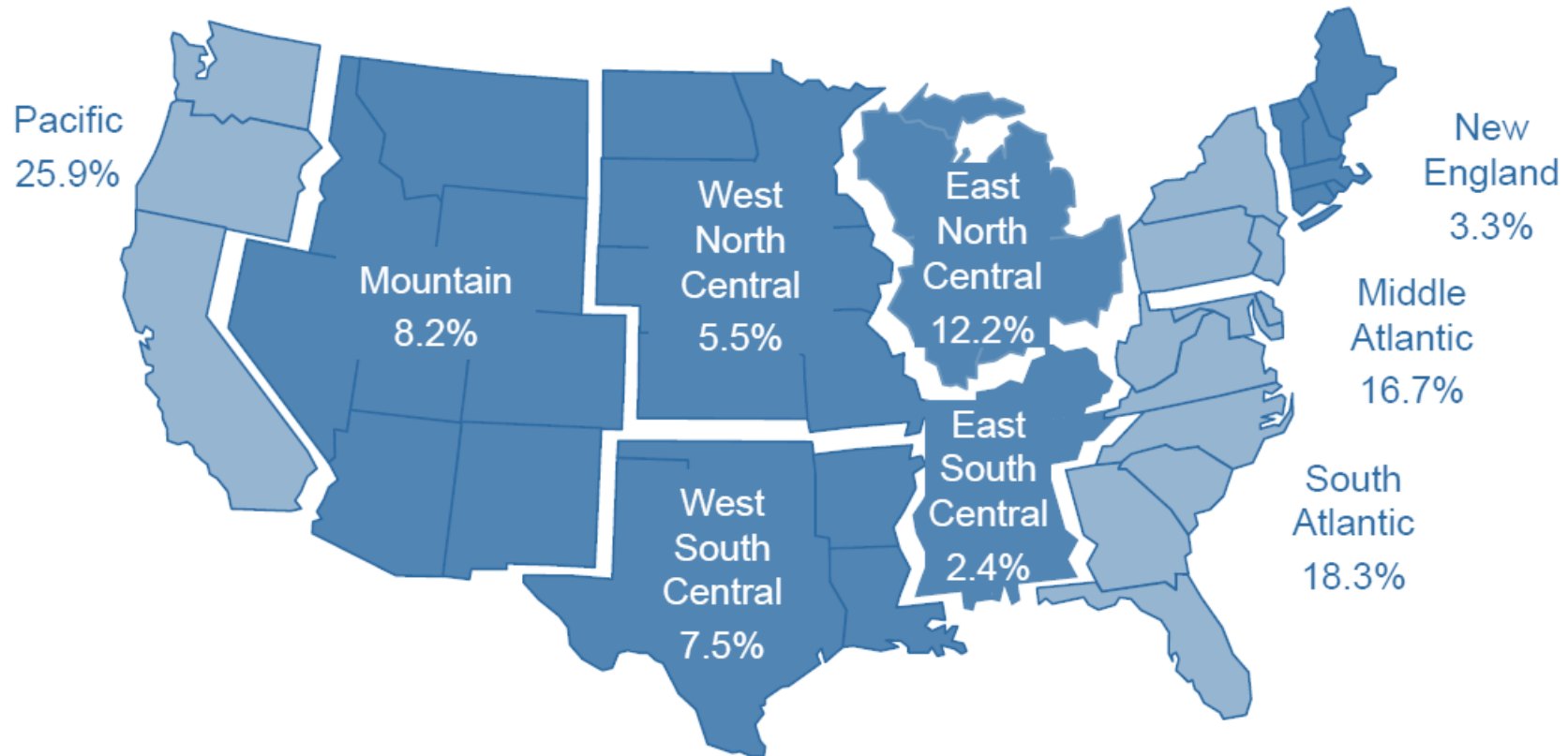
American overseas travelers who are
extremely/very interested in visiting
Hawai'i but have never visited before

= 33% of Hawai'i Target Travelers



Hawai'i Target Traveler Profile

Location



Hawai'i Target Traveler Profile

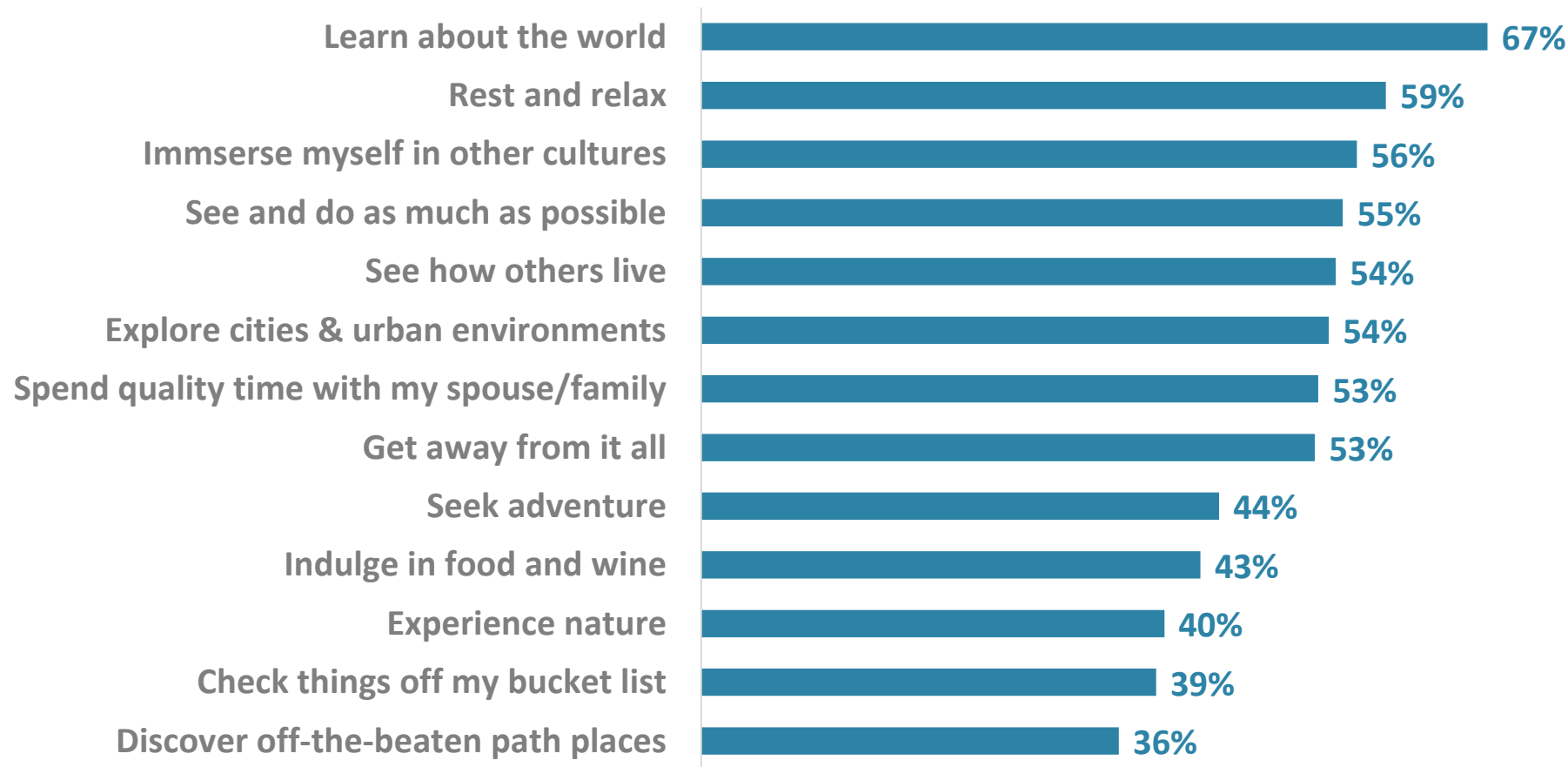
Demographics

Household Income	\$97,317
Dependent Children	32.6%
College Graduate	74.1%
Never Visited Hawai'i	32.8%
Previously Visited Hawai'i	67.2%
Median Stay	8.5 nights
Median Spend	\$2,233
Traveled with Spouse	73%
Traveled as Family	30%

Hawai'i Target Traveler Profile

Motivations

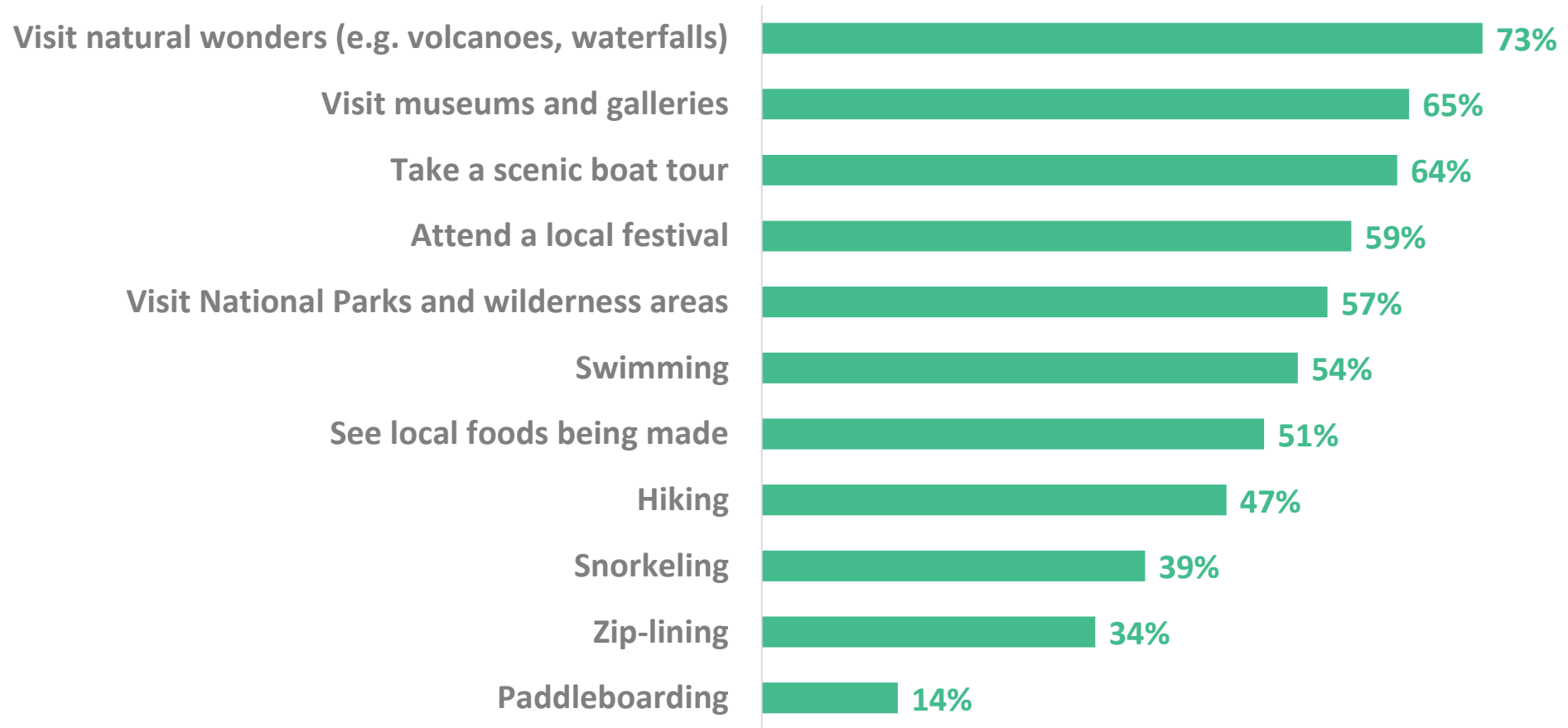
"For me, a vacation is time to..."



Hawai'i Target Traveler Profile

Activities

Likely to Do While on Vacation



Hawai'i Target Traveler Profile

Choosing Hawai'i

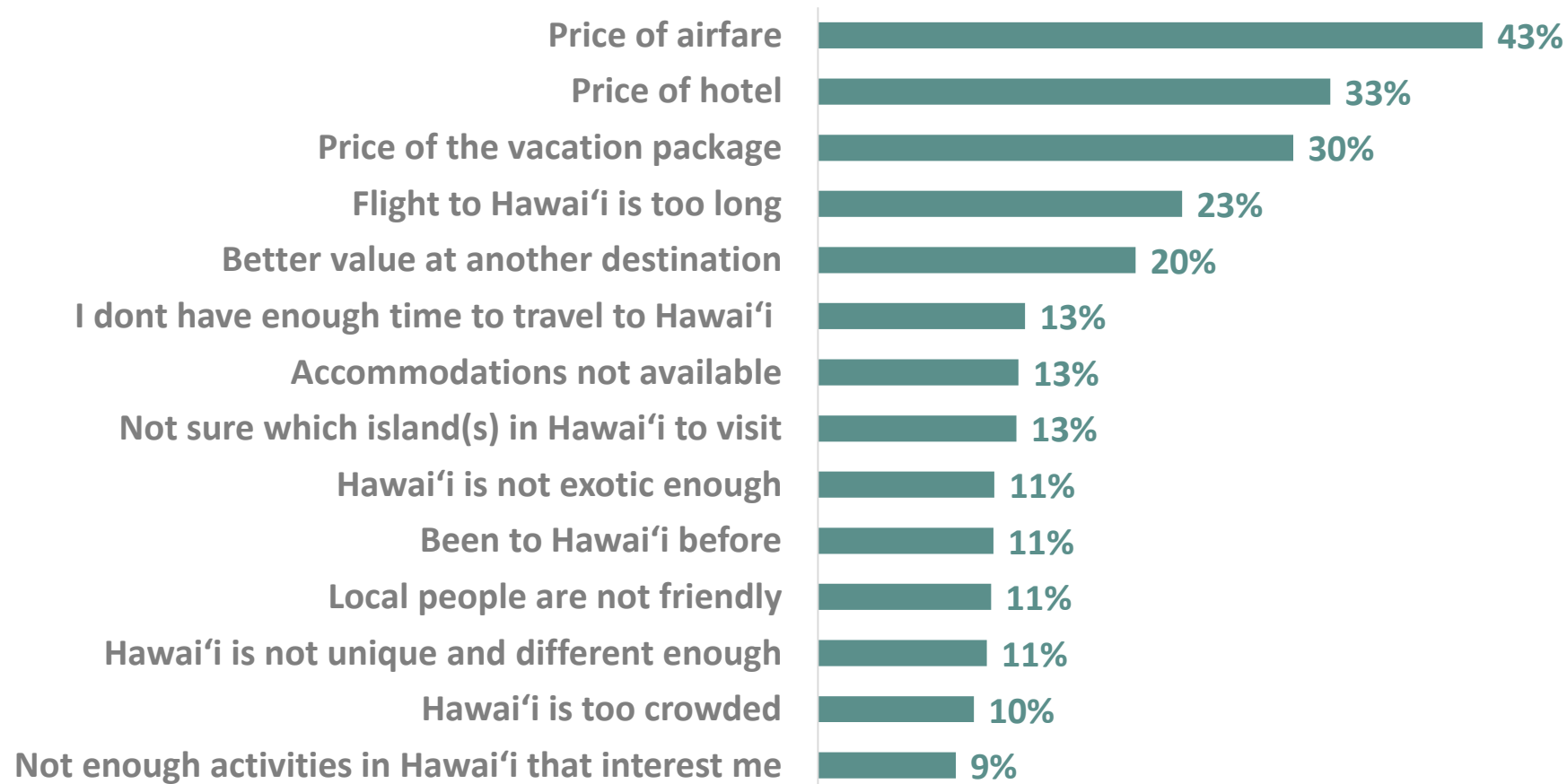
Influences for Most Recent Vacation to the Hawaiian Islands



Hawai'i Target Traveler Profile

Reasons for Not Visiting

Previously Considered Visiting Hawai'i but Decided Not To



Creating a Marketing Plan

Hawai'i Target Traveler Media Profile



Overall Avid Traveler (MRI) 2-36.9MM

- Frequent Traveler*
 - 2+ Domestic in past 12 months OR 1+ foreign travel in past 3 years
- \$75K+

Avid First Timer (MRI) 2-28.2MM

- Frequent Traveler
 - 2+ Domestic in past 12 months OR 1+ foreign travel in past 3 years
- \$75K+
- Visited Mexico OR Caribbean in past 3 years OR Very Likely to visit Mexico OR Caribbean in the next year
- NOT Hawaii in the past 3 years

Culture & Arts Traveler (MRI) 2-28.5MM

- Frequent Traveler
 - 2+ Domestic in past 12 months OR 1+ foreign travel in past 3 years
- \$75K+
- Statements
 - Foreign travel great way to learn about other cultures
 - I like to learn about art, culture and history

Outdoor Recreation Traveler (MRI) 2-35.7MM

- Frequent Traveler
 - 2+ Domestic in past 12 months OR 1+ foreign travel in past 3 years
- \$75K+
- Statements
 - On vacation any of the following:
 - General sightseeing
 - Go to beach
 - Play golf
 - Running/jogging
 - Sailing
 - Scuba diving
 - Skiing (cross country/downhill)
 - Play tennis
 - Visit National Park
 - Fishing
 - Hunting
 - Backpacking/hiking
 - Bicycle riding
 - Other outdoor activities

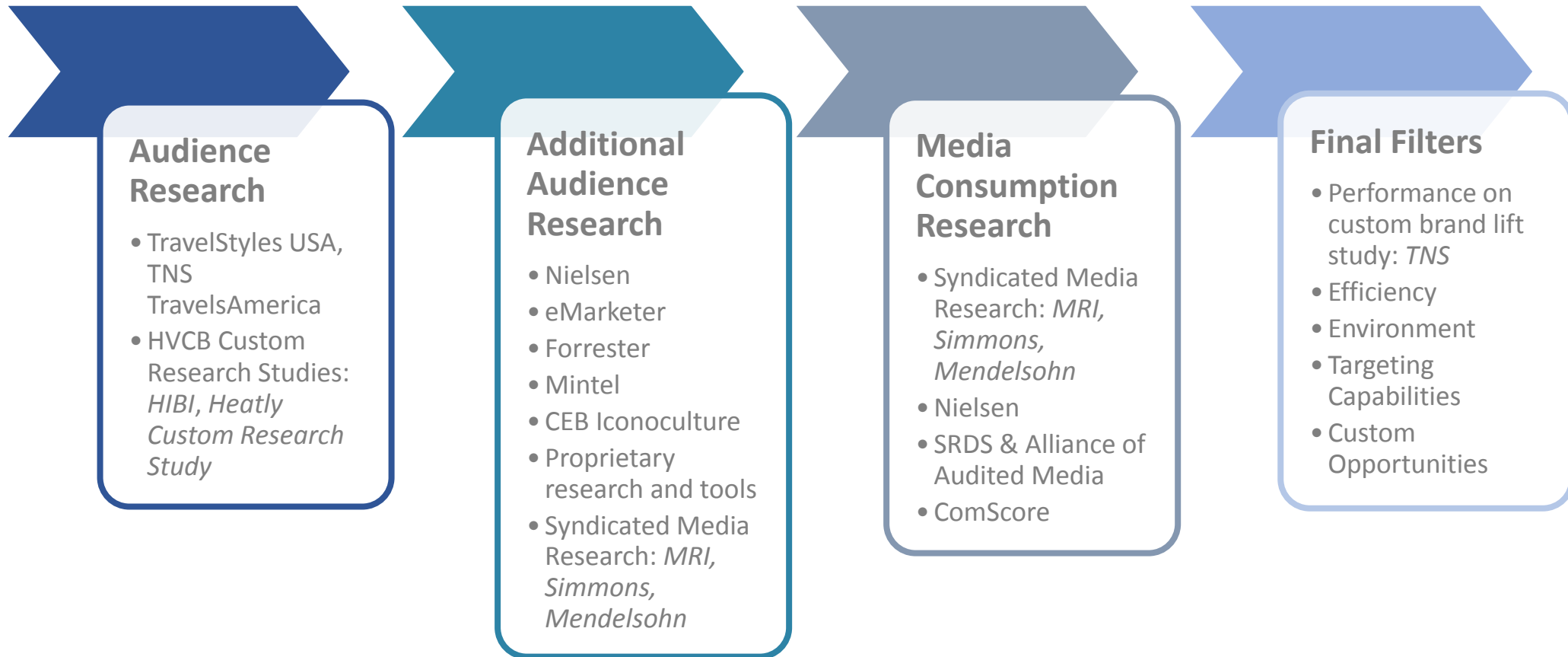
Golf Traveler (MRI) 2-5.2MM

- Frequent Traveler
 - 2+ Domestic in past 12 months OR 1+ foreign travel in past 3 years
- \$75K+
- Play Golf 1+ Month

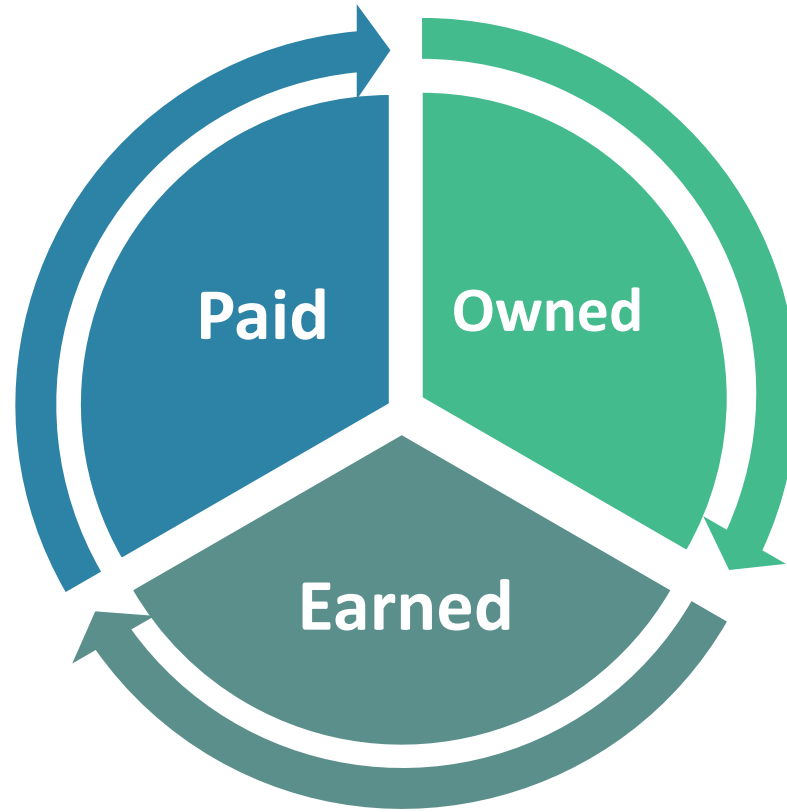
Romance Traveler (MRI) 2-1.7MM

- Female
- Age 18-34
- \$75K+
- Married 1 year or less OR Currently engaged to be married

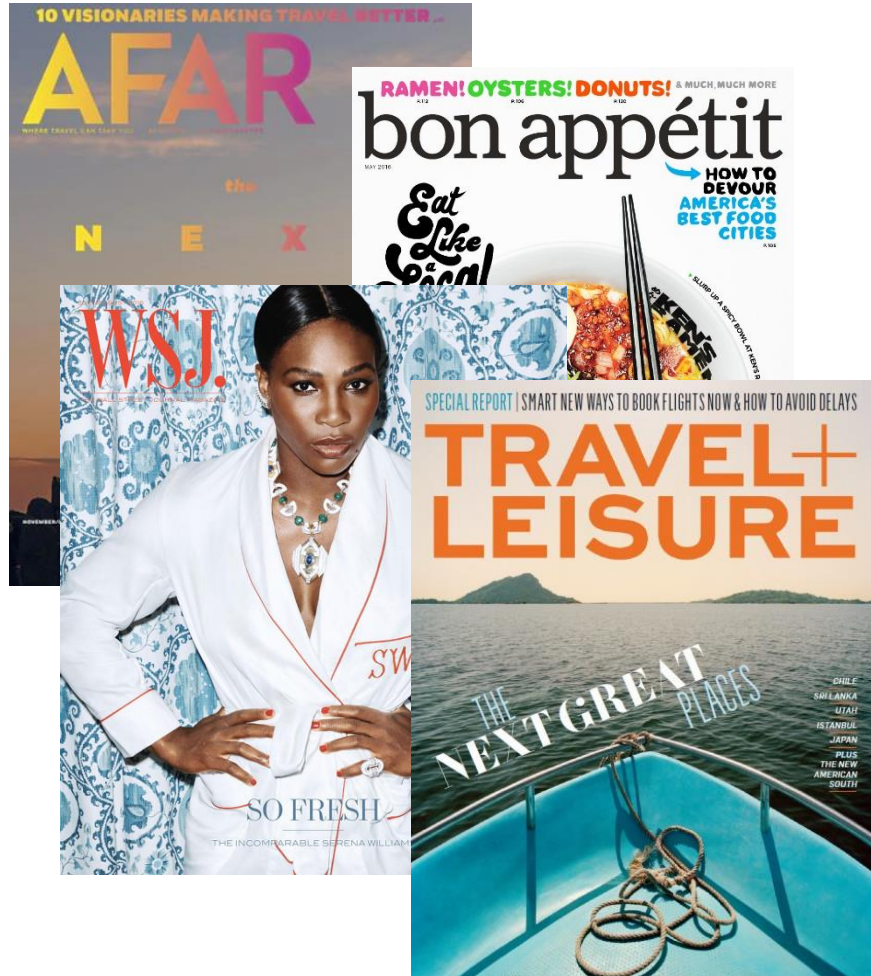
Selecting Media



Let Hawai'i Happen Media Mix



Paid Media – Print & Digital



Google YouTube

the knot


tripadvisor®

Paid Media – TV & Cinema



SPOTLIGHT
CINEMA NETWORKS



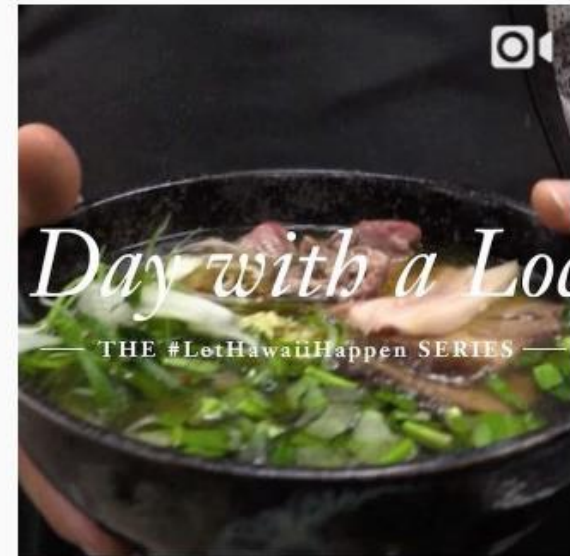
Owned Media – Social Channels



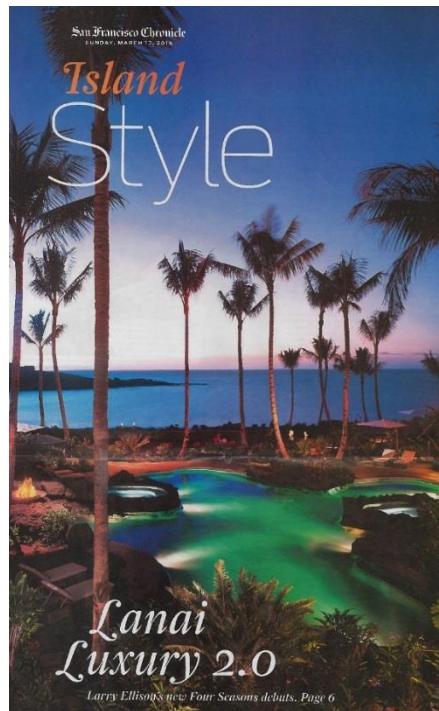
gohawaii [Follow](#)

884 posts 176k followers 291 following

Hawaii Aloha and welcome to Hawaii's official Instagram feed. Be sure to tag your favorite Hawaii moments with [#LetHawaiiHappen](#) www.gohawaii.com



Earned Media - PR

[illegible]

SHOPPING | **Beauty, Music, and More** | 11

SHOPPING

RENEE CLOUTIER PHOTOGRAPHY
STYLING: JESSICA HARRIS
HAIR: LUCY FORTNEY/DAVID
NAILS: LUCY FORTNEY/DAVID

SHOPPING FOR CREATIVE, AUTHENTIC HAWAIIAN GIFTS

By Leland M. Lahey

One of the joys of commemorating a Hawaiian vacation with cherished, personalized mementos was made easy for you from the days' home. Here are shopping, gifting, and the things you'll want to remember, from modern aloha shirts to artisan goods that'll hold their place in a cherished memory.

Musical

Whether you're a vocal and instrumental artist, there's always a place for you in Hawaii. And there's no better place than the Hawaiian Islands to find the instruments and gear you need to make your music. In Honolulu, you'll find a wide variety of musical instruments and gear, from ukuleles to guitars, and from amplifiers to recording equipment.

Native Instruments in Honolulu is a great place to find the instruments and gear you need to make your music. In Honolulu, you'll find a wide variety of musical instruments and gear, from ukuleles to guitars, and from amplifiers to recording equipment. **Native Instruments** in Honolulu is a great place to find the instruments and gear you need to make your music. In Honolulu, you'll find a wide variety of musical instruments and gear, from ukuleles to guitars, and from amplifiers to recording equipment.

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Ukulele

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The most recent set of custom gear for artist, **Native Instruments** in Honolulu is a great place to find the instruments and gear you need to make your music. In Honolulu, you'll find a wide variety of musical instruments and gear, from ukuleles to guitars, and from amplifiers to recording equipment.

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Hawaiian

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[illegible]

San Francisco Chronicle

Let Hawai'i Happen – Influencer Program



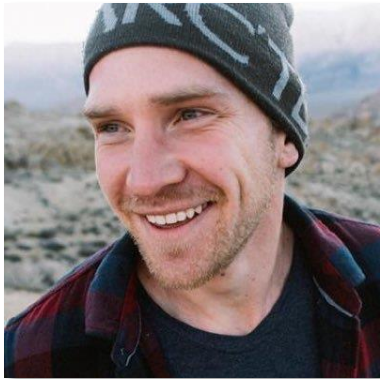
Cole Rise
+1M followers



Kate Patterson
+18K followers



Pete Halvorsen
+178K followers



Taylor Burk
+223K followers

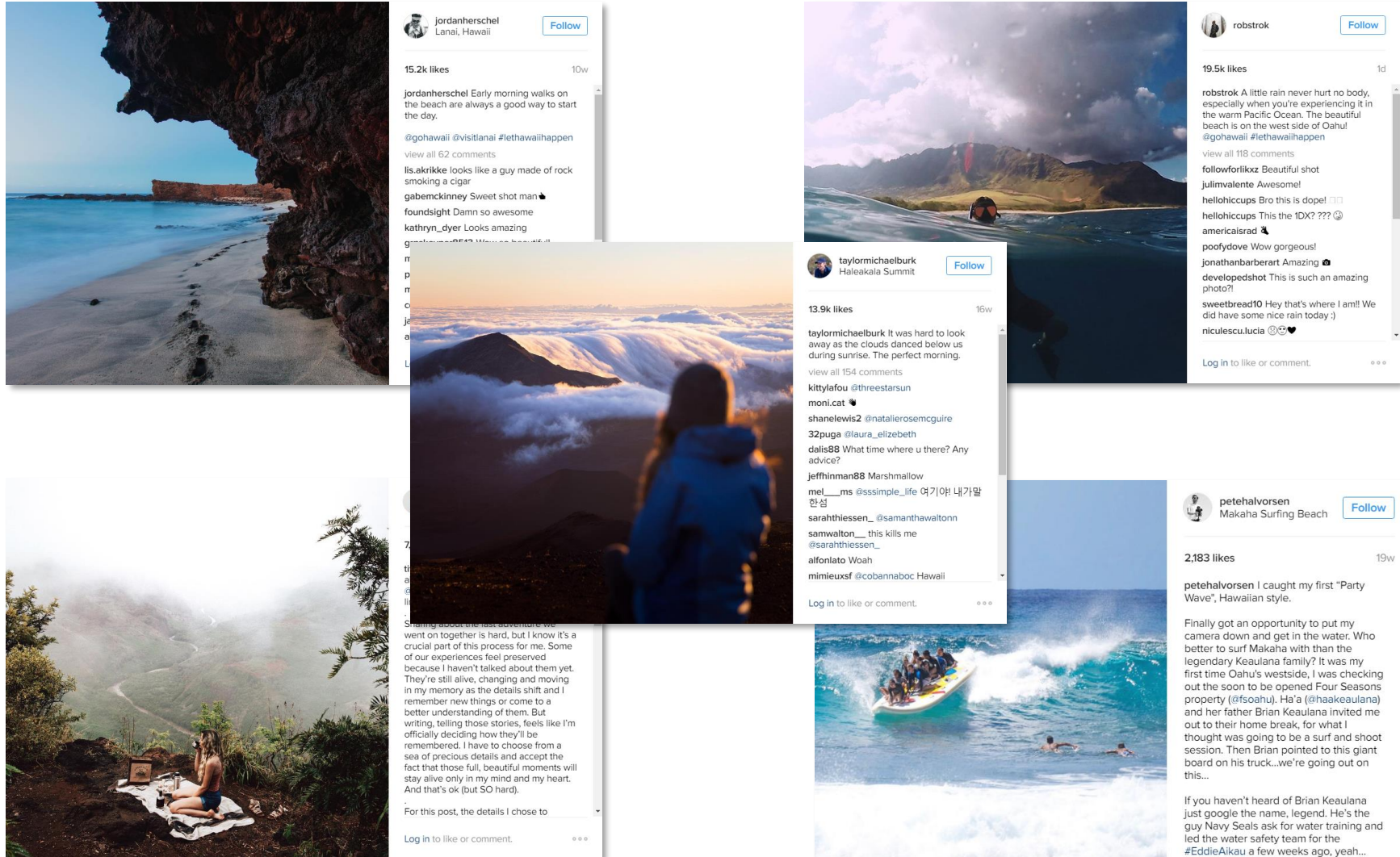


Tiffany Mitchell
+173K followers

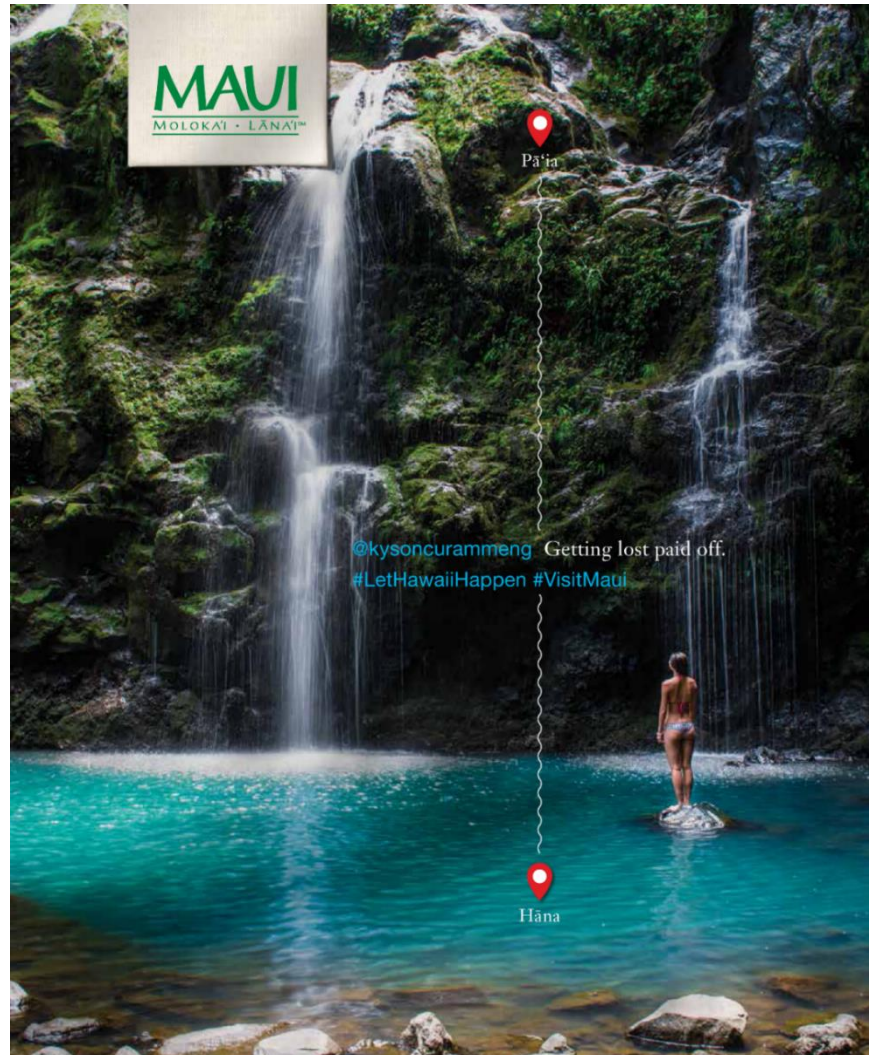


Jordan Herschel
+411K followers

Let Hawai'i Happen – Content



Let Hawai'i Happen - Maui



ADVERTISEMENT

Four Perfect Pins: Maui

with Kyson Curammeng

Take the scenic route. Experience unpredictable moments. Meet remarkable people. There's more to your Hawai'i vacation than you think. Maui photographer Kyson Curammeng inherently knows this. He fell in love with the islands as a boy and has devoted his craft to capturing the turquoise waves, ginger-riddled mountains, and beaches he calls home. Follow Kyson on Instagram (@kysoncurammeng), and read on for his top Maui spots.



HALEAKALĀ

"My ideal day begins with a morning trek to the monumental volcanic crater known as Haleakalā. I like to arrive while stars are still in the sky and then hike up for the stunning sunrise."



SAM SATO'S, INC.

"My go-to for an authentic Maui breakfast in Wailuku. Their famous dry mein, or boiled noodles with char sui pork, is flavored with secret seasoning and incredibly addictive."



ROAD TO HĀNA

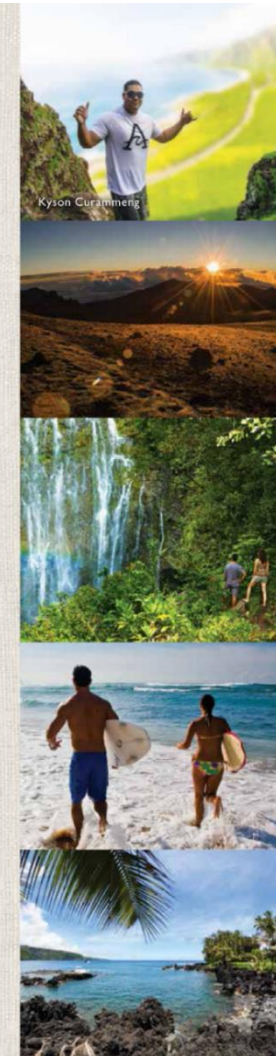
"As a local, one of my favorite things is to drive Maui's Hāna Highway. I stop at every waterfall for a refreshing dip in the cool water that's found its way down from the mountains."



MAUI TROPIX SURF CO.

"Hit up this surf shop for locally made goods you can't get anywhere else. From their iconic Maui Built clothing to handcrafted surfboards, it's the ultimate Hawai'i shopping experience."

Get inspired at #LetHawaiiHappen





Measuring Marketing Impact

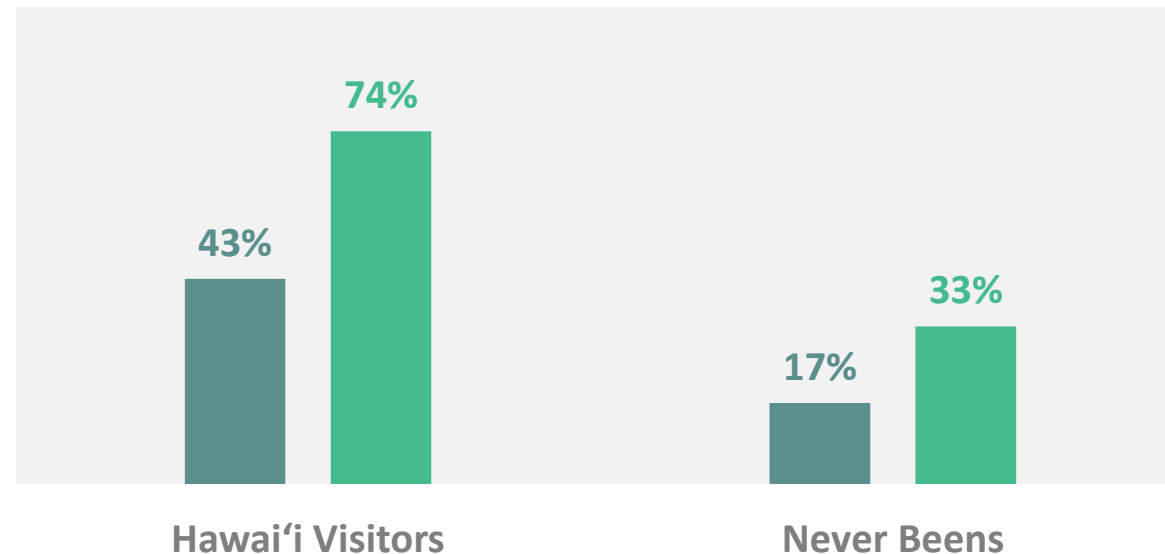
Let Hawai'i Happen Campaign Impact



Nearly two-thirds (65%) of U.S. Avid Travelers recall at least one of HVCB's marketing efforts (paid, earned, or owned advertising).

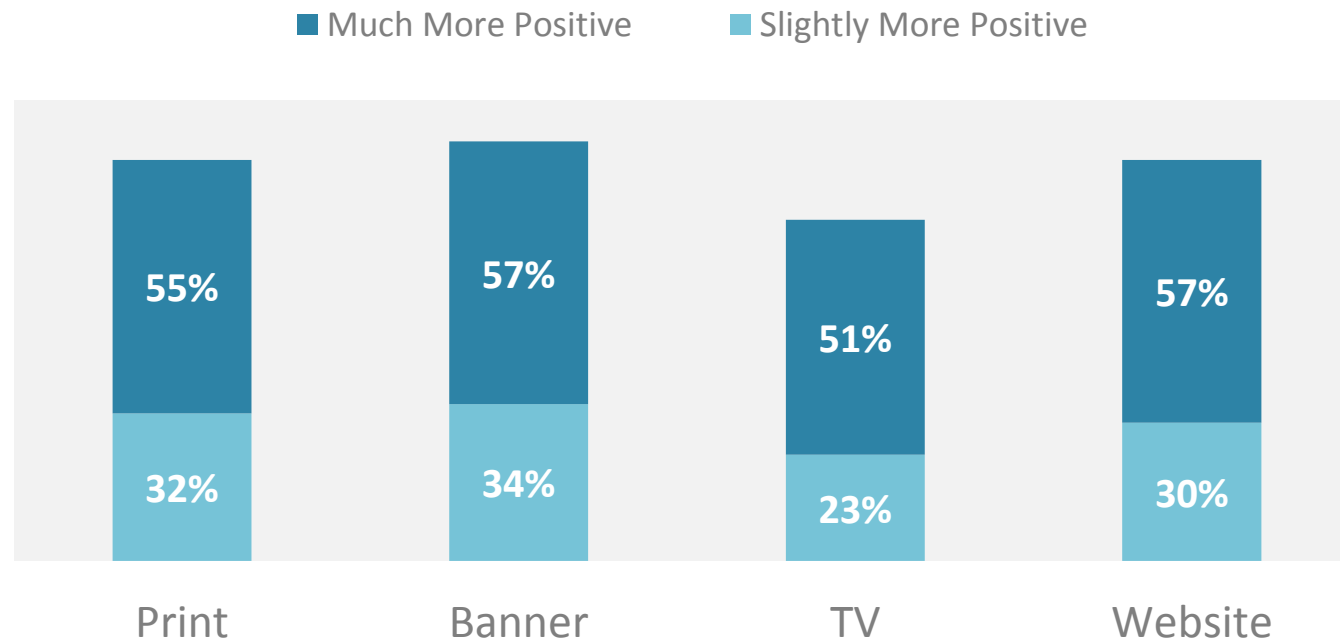
Percent Planning to Visit Hawai'i in Next Two Years

■ Not Exposed to HVCB Marketing ■ Exposed to HVCB Marketing



Maui Brand Perceptions

How does HVCB's paid advertising and owned media change perceptions of Maui among targeted travelers?



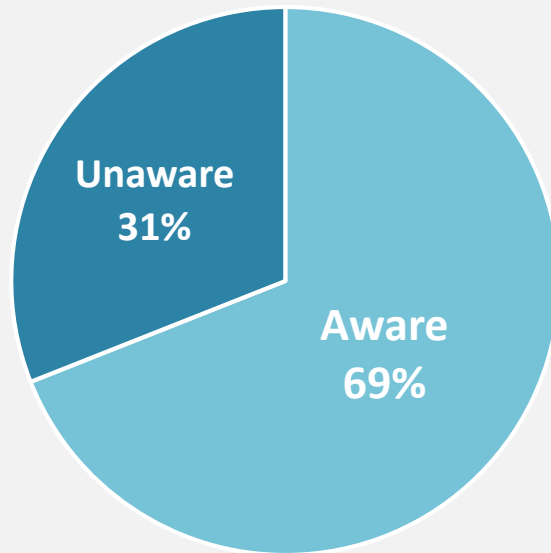
Source: TNS Marketing Effectiveness Study 2015



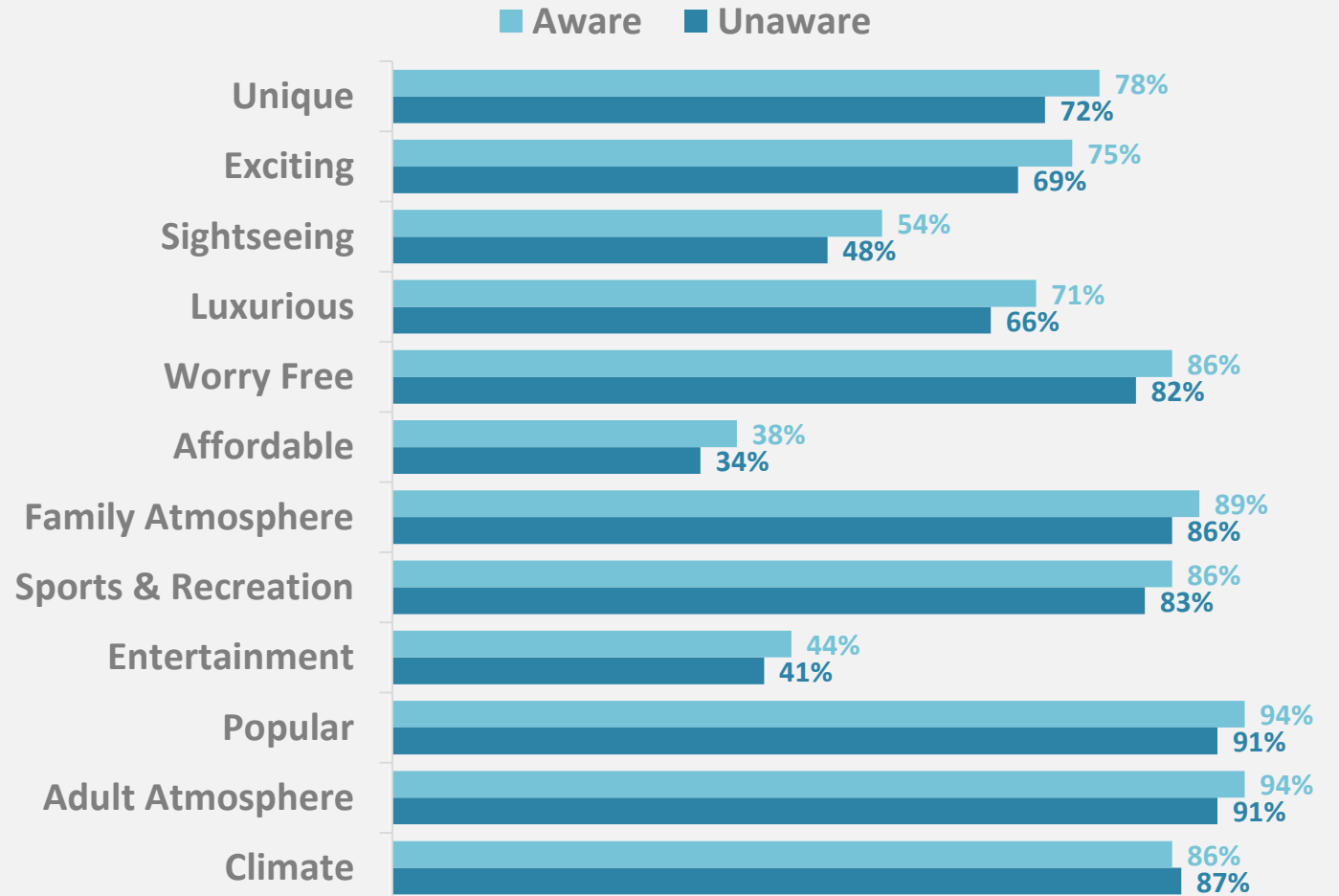
Quantifying the Value of Marketing Expenditures

Case Study: Los Angeles Blitz

Awareness of Hawai'i



Impact of Blitz on Hawai'i's Image



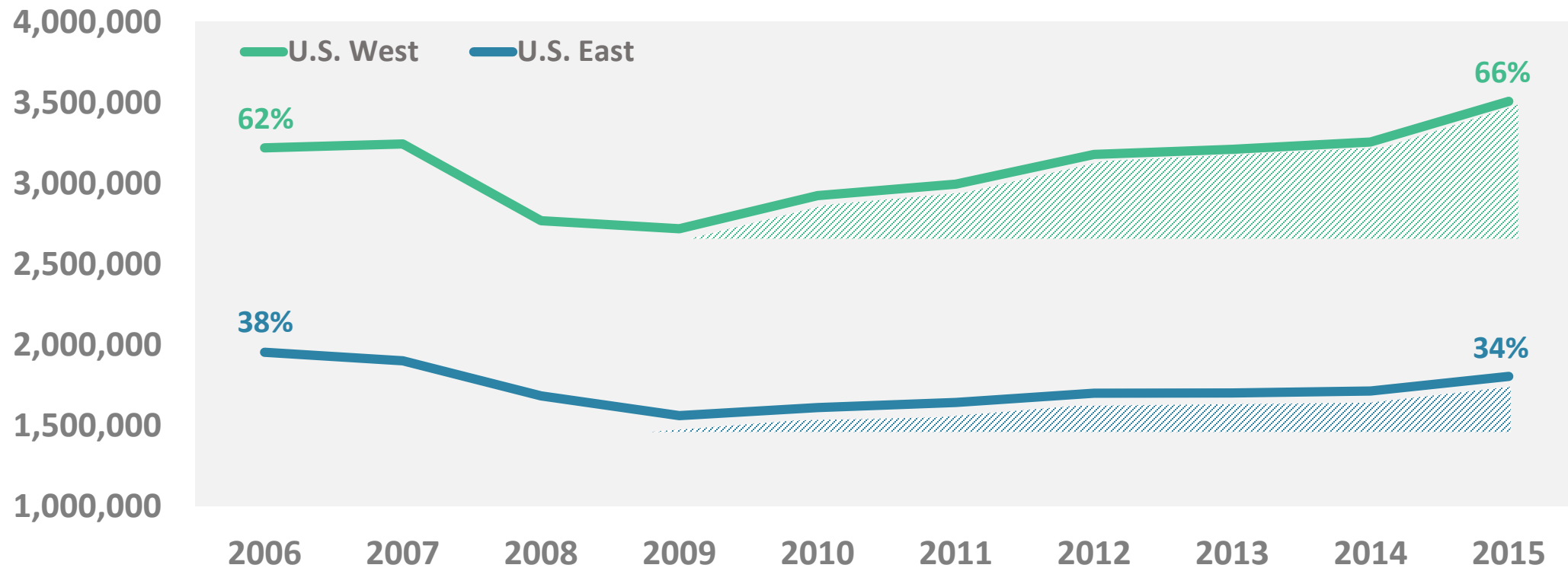
Case Study: Los Angeles Blitz

Economic Impact of Los Angeles Blitz	
Incremental trips due to advertising	32,300
Average per person expenditures in Hawaii	\$1,275.65
Incremental spending due to advertising	\$41,200,000
Taxes generated on incremental spending	\$4,409,000
Advertising/PR expenditures	\$1,645,740
Spending generated per ad dollar	\$25.04
Taxes generated per ad dollar	\$2.68

The Case for New York



U.S. West vs U.S. East Arrivals



Source: Hawai'i Tourism Authority

Hawai'i's Market Penetration

Rank	MMA	Region	2015		
			Arrivals	Population	Market Penetration
1	USW	Los Angeles-Long Beach-Anaheim CA	602,222	13,340,068	4.5
2	USW	San Francisco-Oakland-Hayward CA	438,626	4,656,132	9.4
3	USW	Seattle-Tacoma-Bellevue WA	321,661	3,733,580	8.6
4	USW	San Diego-Carlsbad CA	187,765	3,299,521	5.7
5	USW	San Jose-Sunnyvale-Santa Clara CA	180,272	1,976,836	9.1
6	USW	Portland-Vancouver-Hillsboro OR-WA	159,510	2,389,228	6.7
7	USE	New York-Newark-Jersey City NY-NJ-PA	152,180	20,182,305	0.8
8	USW	Sacramento-Roseville-Arden-Arcade CA	129,343	2,274,194	5.7
9	USW	Phoenix-Mesa-Scottsdale AZ	127,486	4,574,531	2.8
10	USW	Riverside-San Bernardino-Ontario CA	115,222	4,489,159	2.6

Source: Hawai'i Tourism Authority and U.S. Census Bureau

Hawai'i Target Travelers by Metro Area



Can New York Be Our Third Largest Market?

Seattle is currently third with 321,661 arrivals

Market Penetration	Total NY Arrivals	Incremental Arrivals (Cumulative)	Incremental Economic Impact (Cumulative)
0.8% (2015)	152,180 (2015)	-	-
1.0%	201,823	49,643	\$103.0 m
1.2%	242,188	90,008	\$186.8 m
1.4%	282,552	130,372	\$270.6 m
1.6%	322,917	170,737	\$354.4 m
1.8%	363,281	211,101	\$438.2 m
2.0%	403,646	251,466	\$521.9 m

Source: Hawai'i Tourism Authority



Let Hawai'i Happen

Market Activation: New York City

Objective

Grow demand with a long term brand building program in New York against the Avid Explorer A25-34 using Cuisine as the aperture.

The
HAWAIIAN
ISLANDS



Mahalo!