

HTUSA Market Update

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Hawai'i Visitors & Convention Bureau



2026 Spring Tourism Update



AGENDA

- Market Insights
- 2026 Campaign Performance
 - Marketing
 - Travel Trade
 - PR & Communications
- Partnership Opportunities



Economic pressures tighten demand— Hawai'i must target high-value visitors and propositions.

Economic Headwinds Impacting Travel

- Economic growth slowing—less money in consumer pockets
- Rising costs eroding purchasing power for vacations
- Tariffs adding nearly \$200B in consumer costs, reducing confidence
- Unemployment rising—middle-income travelers feeling pressure

What This Means for Bookings

- U.S. market still #1 source, but visitor arrivals are softening
- Flights are stable but fewer seats available—expect higher fares, tighter inventory
- Honolulu continues as strongest gateway for most arrivals
- Bottom line: Capacity growing modestly while demand creates booking competition and upward pricing pressure

Strategy for Hawai'i

- Strong U.S. January (arrivals +10%, spending +20%) masks cautious full-year outlook (+0.8% growth). Middle-market travelers cutting back due to affordability pressures.
- Industry Priorities: (1) Target high-value visitor segments, (2) Maintain flight access and inventory, (3) Industry partners: Develop packages and promotions that deliver compelling value versus shorter/cheaper trips outside of Hawai'i.



Americans are avoiding overseas travel, positioning Hawai'i as a top, safe, domestic alternative.

Americans Avoiding Overseas Travel (YouGov)

- Most Americans (60%) never travel overseas for leisure
- International trips declining—Gen X and Boomers cutting back most
- Europe seeing fewer U.S. visitors (down 7% January 2026)
- 41% shifting budget from international to domestic destinations

Competing Destinations Losing Appeal

- Mexico: Safety advisories discouraging some travelers (6 states "Do Not Travel")
- Middle East: Conflict prompting U.S. government "leave now" warnings
- Europe: Higher costs and uncertainty reducing American interest
- Result: Travelers seeking "safe, domestic exotic" alternatives

Hawai'i Opportunity

- As Americans avoid Mexico (safety), Middle East (conflict), and Europe (cost/uncertainty), Hawai'i emerges as premier "safe, domestic exotic" destination.



HTA's Rams partnership launched the "Hawai'i Stays With You" campaign and extended brand reach through high-impact fan and client engagement.

- HTA sports sponsorship: LA Rams Hawai'i Game Day, 4 January 2026 | SoFi Stadium
- Full in-stadium integration: digital signage, Xfinity screen, IPTV, Rams360 local broadcast spot
- Fan engagement: Hawai'i Sweepstakes + activation booth with hula kahiko and lei wall by campaign ambassador Britney Alejo-Fishell
- LA media outreach + social promotion extended reach beyond game day
- Entertained top MCI clients, connecting destination brand to group business pipeline



Q1 media is exceeding reach benchmarks and driving strong video engagement

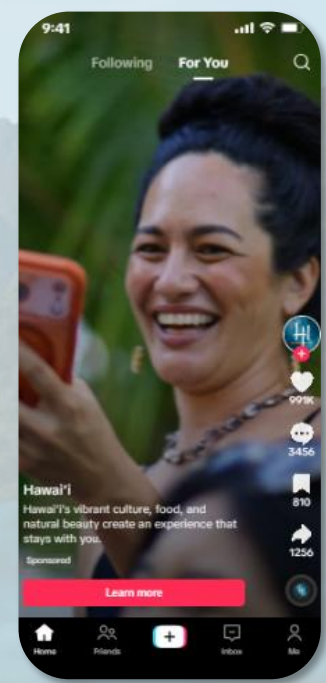
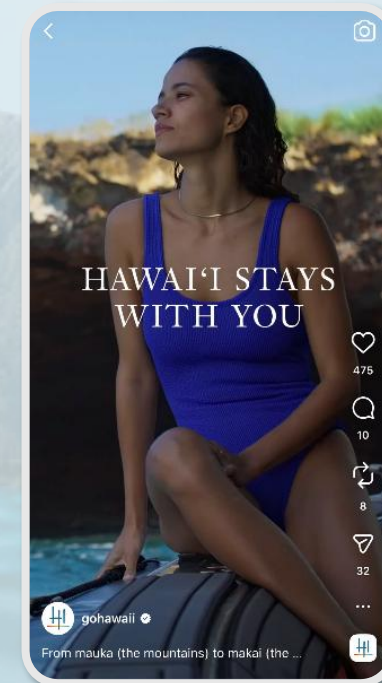
Paid Media

- Delivering 110M+ impressions — 30% above plan — with strong reach across Meta, TikTok, and YouTube
- Advanced TV delivering a 98% completion rate against a 96% benchmark
- Digital Video VCR at 74.2%, on par with the 74% industry standard
- Short-form creative driving 28.2M+ video views across platforms

Organic Social

- 53.3K+ organic impressions delivered
- 2.7K+ organic engagements
- Short-form video storytelling – 38.1K+ organic video views across platforms

HAWAII TOURISM
UNITED STATES

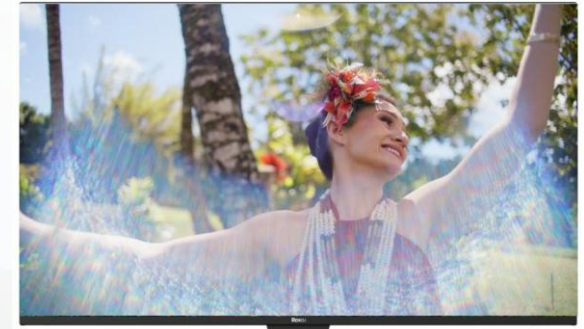


Q1 Creative in Market

SAMSUNG Ads



Roku



Q1 Creative in Market

Types of content that help us Inspire...

PLANNING

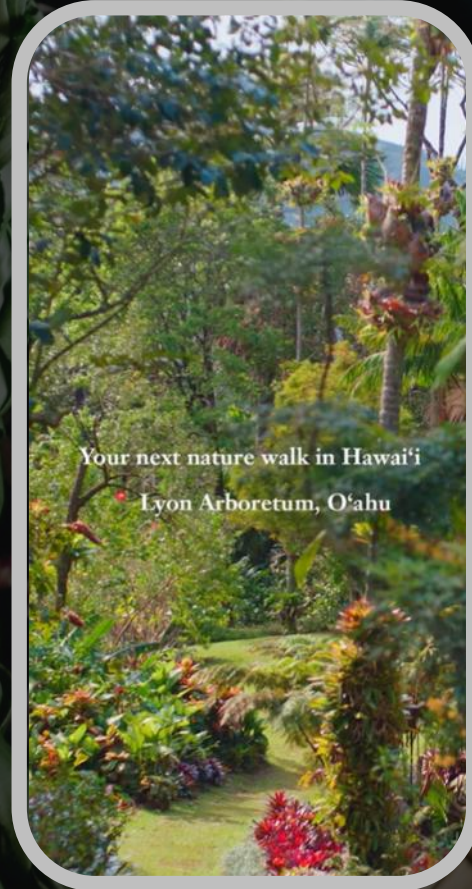


Hawai'i Starter Pack

A fun, save-ready series with owned and UGC footage that shows visitors simple, easy-to-find experiences across the islands to kickstart their trip planning.

The First Thing I Do

Using POV, owned, and UGC footage to create authentic, island-specific moments that give future travelers a curated guide and spark inspiration for what to do the minute they land.



PLACE / PLANNING

Q2 builds on momentum with island storytelling and ambassador-led content.

The *Hawai'i Stays With You* brand platform continues its rollout across social channels in Q2, building on Q1 momentum with island-specific content that deepens consumer engagement with the campaign's emotional narrative, and ambassador content that will be amplified beyond owned channels to extend reach.

- **Jaedyn Pavao (Kaua'i)** — Miss Aloha Hula 2025
- **Keola Rapozo (O'ahu)** — Founder, FITTED
- **Britney Alejo-Fishell (Maui)** — Founder, Haku Maui
- **Asialynn G. Kama-Yap (Island of Hawai'i)** — Founder, Traditions Hawai'i LLC



Q2 Creative in Market

Types of content that help us Inspire...

PEOPLE



What's one thing or place you hope stays with visitors?

Local Aloha

Featuring ambassador content that lets travelers connect with the artists, musicians, and community leaders who embody Hawai'i's culture, values, and worldview.

Only in [Hawai'i]

Leveraging owned, POV, and UGC footage, we'll spotlight island-specific establishments, experiences and food that visitors can only do in Hawai'i.



1

IYKYK:
One Sweet Lady of Waiāhole,
please

PLACE / PLANNING

Travel trade sees expanding advisor engagement and increased activation.

Q1

- Blitzes, partner events, and webinars – 11 events reaching 901 travel advisors
- Owned database comms reaching 156K travel advisors
- Trade media campaign launched mid-Feb
- Travel advisor website – 1,571 new registrants and 1,446 Hawai'i Destination Specialist course completions (as of 27 March)

Q2

- Blitzes, partner events, and webinars – 18 events planned, including a blitz and multi-island FAM
- Consortia partnerships tactics to launch in April



PR efforts are growing Hawai'i's national reach through high-impact media partnerships, content features, and upcoming press engagements.

Q1

- First-ever Hawai'i Section at IMM North America – 600+ media appointments between 26 industry partners statewide
- National series “From Scratch” features Maui farmers, fishers, and food producers – launched on Peacock on 2 March
- Munchies by VICE showcases local businesses to ~5M YouTube subscribers – Sage Creamery | 27 March

Q2

- Munchies by VICE – Kahuku Farms | 10 April
- HTUSA Virtual Media Blitz | 11-15 May
- Upcoming Media Visits (National Geographic, Outside, Travel + Leisure, Eating Well, Fodor's)



Partnership Opportunities

Activity	Contact(s)	
Statewide Digital Cooperative Marketing Programs	Gina Chun gchun@hvcb.org	HVCB Membership Department membership@hvcb.org
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>	HVCB Membership Department membership@hvcb.org	
Virtual Media Blitz <i>11-15 May 2026</i>	Lei-Ann Field lfield@hvcb.org	Taryn Pascua tpascua@hvcb.org
Multi-Island FAM <i>9 – 15 June 2026</i>	Robyn Basso rbasso@hvcb.org	Christy Calabrese ccalabrese@hvcb.org

<https://hawaiitourismauthority.org/what-we-do/partnership-opportunities/>

The word "Mahalo" is centered in the middle of the image in a large, white, serif font. The background is a dark, close-up photograph of a green leaf with prominent veins, creating a textured and organic feel.

Mahalo