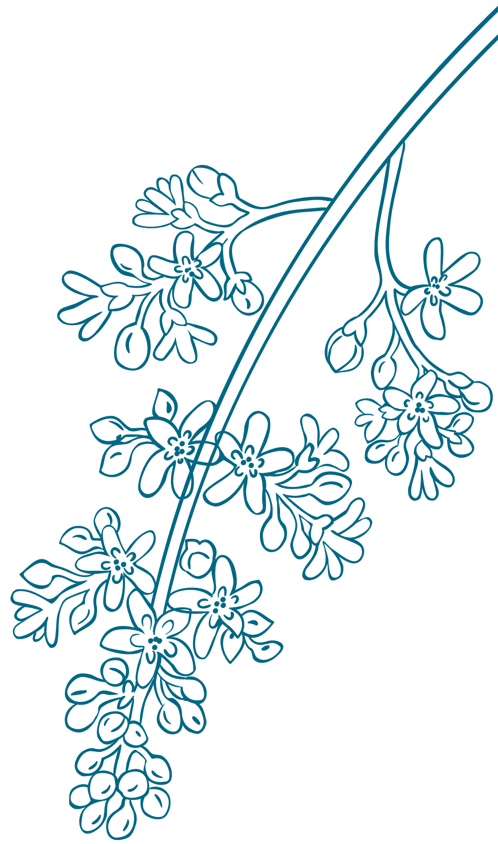
Hawai'i Tourism Authority

Hawaii Tourism Authority (HTA) / Tor Johnson

STRATEGIC PLAN

2026 -to- 2030

HRS 201B-7 Tourism-related activities.
(b) The authority shall be responsible for:
(1) Creating a vision and developing a long-range strategic plan for tourism in Hawai‘i.



WHY THIS PLAN WAS CREATED

Recognizing the vital role of tourism in the state’s economy and quality of life, the State Legislature established the Hawai‘i Tourism Authority (HTA) in 1998 to provide long-term leadership and strategic direction for Hawai‘i’s visitor industry. This Strategic Plan continues that responsibility by setting a clear vision and priorities for Hawai‘i tourism through 2030.

Our strategic plan informs how we organize HTA’s activities and responsibilities to strategically manage Hawai‘i tourism in keeping with the priorities of community, industry, and government stakeholders.

Through 2030, our planning and programs will be guided by this strategic plan’s Principles, Pillars, and Strategies, ensuring alignment among all of our planning efforts. These include periodic Destination Management Action Plans, the annual Strategic Tourism Management Plan, the Marketing Plan, the Workforce Development Plan, and the Sports Strategic Plan.

Our intentions for implementing this comprehensive strategy are detailed in the Tourism Functional Plan. This 2026-2030 Strategic Plan is the HTA’s sixth strategic plan or update, with the most recent previous version approved for 2020-2025.

ABOUT THE DESIGN

The design of the 2026-2030 Strategic Plan draws inspiration from Hawaiian concepts, including several *‘Ōlelo No‘eau*, traditional Hawaiian proverbs. *Mahalo nui* to HTA Advisory Board Member and *kumu hula* Troy Lazaro for generously sharing insights to help ensure this plan reflects the wisdom of the culture that makes our islands unique.

The cover portrays Hawai‘i’s official state tree, the kukui plant, symbolizing light, knowledge, and enlightenment. Early navigators used kukui nut oil to light their way across the ocean to our islands. Kukui light is sacred in Hawaiian culture. Our hope is that this plan lights the way to better outcomes for tourism and our islands.

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EXECUTIVE SUMMARY

The 2026-2030 Strategic Plan provides a renewed back-to-basics strategic framework for Hawaiʻi tourism – refocusing on what matters most: strengthening competitiveness, deepening collaboration, and ensuring that tourism creates greater value for residents and communities as well as for visitors and the visitor industry.

Fulfilling these important objectives through 2030 will require increased funding for the Hawaiʻi Tourism Authority, potentially through restoration of a dedicated revenue source. An intention of this plan is to make the case for ways more funding could build the long-term strength and resilience of our state's top economic driver. To underscore the importance of this, we have made "Increased Funding" a Primary Key Performance Indicator.

Rooted in Hawaiʻi's cultural riches, natural beauty, and timeless appeal for travelers, the plan recognizes tourism not as an end in itself, but as a force that must deliver greater benefits for the people and extraordinary culture and places that set Hawaiʻi apart. These intentions underlie each of this plan's three Pillars, which reflect the Hawaiʻi Tourism Authority's core responsibilities: Brand Marketing, Experience Development, and Tourism Leadership.

Drawing upon extensive stakeholder engagement, this plan creates a sharper, actionable focus on prioritizing "value over volume" of travelers to manage overall visitation while driving a healthy tourism economy. Success will be defined primarily by the quality, timing, and spending of visitors, ideally with growth in visitor spending outpacing increases in visitor arrivals.

A new direction for brand marketing is to strengthen Hawaiʻi's competitive position through clearer market segmentation, a more distinctive brand position, smarter digital tools, and targeted strategies that attract the right visitors at the right times. This responds directly to rising competition, slower business travel recovery, promising travel trends, climate-related risks, and concerns that Hawaiʻi has been losing its competitive edge.

A second major shift is elevating the role of experience development. The plan heightens emphasis on guiding and shaping the visitor experience, especially to attract purpose-driven, higher-spending visitors. Initiatives in agritourism, sports tourism, Meetings, Convention and Incentive (MCI) development, cultural storytelling, local sourcing, and community-rooted experiences aim not only at diversifying the tourism economy but supporting other economic sectors. This direction is geared to create opportunities for local entrepreneurs, outfitters, artists, makers, and growers while strengthening Hawaiʻi's brand through experiences that are authentic, sustainable, and locally beneficial. It also enhances Hawaiʻi's ability to meet high-value travelers' rising interest in centering travel plans on experiences.

The plan also introduces a more collaborative agenda for leadership. HTA is moving to build organizational excellence and to increase accountability through transparency and by sharing clear evidence of tourism's contributions. This encompasses stronger partnerships with state and local government bodies, industry and labor, academic institutions, and communities, with clearly defined roles and responsibilities, performance measurement and proactive communication with broad audiences. The plan also envisions HTA more actively partnering to advance policies and programs, such as guiding efforts to make Hawaiʻi a national or even global center of excellence for tourism training.

Collectively, these directions set a more deliberate path to success for Hawaiʻi tourism. HTA will be more strategic in the visitors it seeks to attract, more intentional in the development of experiences it supports, more transparent and collaborative in its decision-making, and more focused on delivering visible benefits for residents while protecting and advancing Hawaiʻi's unique sense of place.

MAJOR OUTCOMES OF THE 2026 TO 2030 STRATEGY

ECONOMIC IMPACT.

The plan is designed to deliver higher visitor yield, with spending growing faster than arrivals, by intentionally targeting high-value segments such as business and MCI travel, sports and major events, agritourism, wellness, and culture-seeking visitors. More local lodgings, makers, growers, and event organizers can sell directly into these segments through curated offerings, experiences, and events.

COMMUNITY IMPACT.

Residents can expect a more respectfully managed tourism ecosystem through projects and programs that are explicitly anchored in each island's Destination Management Action Plan (DMAP). By incorporating the input of communities on how to evolve tourism as a guide for marketing, the DMAPs aim to mitigate visitor pressure and create better alignment between tourism activity and community priorities. Success will be measured by improving resident sentiment for tourism.

ORGANIZATIONAL IMPACT.

The plan will result in a stronger, more accountable HTA through a clarified mandate, an updated Tourism Functional Plan, and a new performance framework that tracks a strategic set of clear Key Performance Indicators for spending, satisfaction, and resident sentiment. Regular reporting and communication to the Legislature and the public as well as formal collaboration mechanisms with other state and county agencies, industry and communities will make tourism policy more coherent and responsive to needs.

DESTINATION IMPACT.

Over time, Hawai‘i will benefit from more systematic protection of culture, nature, and place identity through the integration of stewardship criteria into funding decisions, program design, and evaluation of new initiatives. By applying regenerative tourism principles to experience development, (re)investing visitor revenues (including the Green Fee) into climate resilience and local quality of life initiatives, and using data to guide visitor flows and messaging, the plan seeks to keep Hawai‘i's landscapes, communities, cultural stories, and business sectors strong while maintaining its competitive position in a crowded global market.

OVERVIEW OF THE 2026-2030 STRATEGIC PLAN

The HTA's newest Strategic Plan creates a sharp focus on fulfilling the core responsibilities described by our governing statute, HRS 201B, to foster a regenerative tourism economy for Hawai'i. Each of the three Pillars is centered on achieving a clear Objective by 2030. These Objectives are to be fulfilled through 18 actionable Strategies and related tactics. We will track performance by primary Key Performance Indicators (KPIs) and other success measures.

OUR MISSION

To strategically manage Hawai'i tourism in a sustainable manner consistent with economic goals, cultural values, preservation of natural resources, community desires and visitor industry needs.

OUR VISION

Hawai'i thrives through collective actions to grow economic vitality, strengthen collaborations, and fulfill our shared kuleana to build a visitor economy where people, place, and culture prosper together, guided by ho'okipa, mālama 'āina, and aloha.

Hawaii Tourism Authority (HTA) / Ethan Tweedie

STRATEGIC PILLAR 1

BRAND MARKETING

OBJECTIVE

Inspire high-value visitation that respects our culture, environment, and communities.

STRATEGIES

- Strengthen the Hawaiʻi brand with clarity and consistency
- Reach the right audiences at the right times
- Drive demand that delivers value to Hawaiʻi
- Amplify Hawaiʻi stories and cultural authenticity

STRATEGIC PILLAR 2

EXPERIENCE DEVELOPMENT

OBJECTIVE

Cultivate meaningful, place-based experiences that benefit communities and engage visitors.

STRATEGIES

- Support and grow diverse, place-based experiences
- Advance sustainability and regenerative tourism
- Strengthen community benefits and local partnerships
- Enhance visitor stewardship and education

STRATEGIC PILLAR 3

TOURISM LEADERSHIP

OBJECTIVE

Lead collaboration, data, and accountability to shape a thriving tourism future.

STRATEGIES

- Foster collaboration across sectors and islands
- Use data and insights to inform decisions and actions
- Advance policy and funding that support our goals
- Strengthen organizational effectiveness and innovation

Guided by overall KPIs: Resident Sentiment, Visitor Satisfaction, Visitor Spending, Average Daily Visitor Spending, Increased HTA Funding.

With specific monitoring indicators, we will track and communicate progress and adapt to deliver results that benefit Hawaiʻi today and for generations to come.

MAJOR NEW INITIATIVES FOR 2026 TO 2030

The Strategic Plan's 18 strategies encompass more than 70 actionable tactics to deliver on the HTA's Vision and Mission. While the plan centers on fulfilling HTA's core responsibilities, it also introduces significant new initiatives and practices to strengthen performance and achieve greater impact. An implementation timeline for all initiatives is provided in Pages 42-45.

PILLAR 1: BRAND MARKETING

- To strengthen Hawaiʻi's market competitiveness, conduct a brand and market segmentation study to differentiate Hawaiʻi from competing "sun and sand" destinations, invigorate the Hawaiʻi brand, and identify high-potential, high-spending traveler segments to drive increased spending.
- Relaunch GoHawaii.com with modern tools and technology to give visitors highly personalized trip-planning tools while delivering insights for powerful "digital-first" marketing of high-priority market segments.
- Provide Hawaiʻi-based visitor industry partners with opportunities to share targeted advertising on GoHawaii.com and other owned HTA communication channels.

PILLAR 2: EXPERIENCE DEVELOPMENT

- Launch an HTA Experience Development program to create significant new and enhanced visitor experiences while generating economic opportunities for local businesses, artists, makers, and growers.
- Strengthen HTA's sports committee by developing and implementing a comprehensive Sports Strategic Plan focused on recruiting and developing major sporting events that drive growth of targeted visitor segments and elevate Hawaiʻi's global brand.
- Develop a comprehensive "agritourism" initiative to connect more producers and products to the visitor economy.
- Field a study to explore perceptions of aloha for and by visitors, including prospective visitors, and identify strategies for improvement.

PILLAR 3: TOURISM LEADERSHIP

- Create an air route sustainability and development plan to protect load factors on current routes, sustain and build seat inventory from inbound markets, and identify opportunities to attract routes from high-potential markets.
- Support the development of Hawaiʻi as a premier training and educational center for the tourism community, serving students in Hawaiʻi and from around the world.

Hoʻomoe wai kāhi ke kāoʻo

Let us all travel together like water flowing in one direction.

When a group or community comes together and embraces a shared purpose, they will move, grow, and navigate their way forward as one. This strategic plan points the way to a unified approach for Hawaiʻi tourism.

Hawaii Tourism Authority (HTA) / Tor Johnson

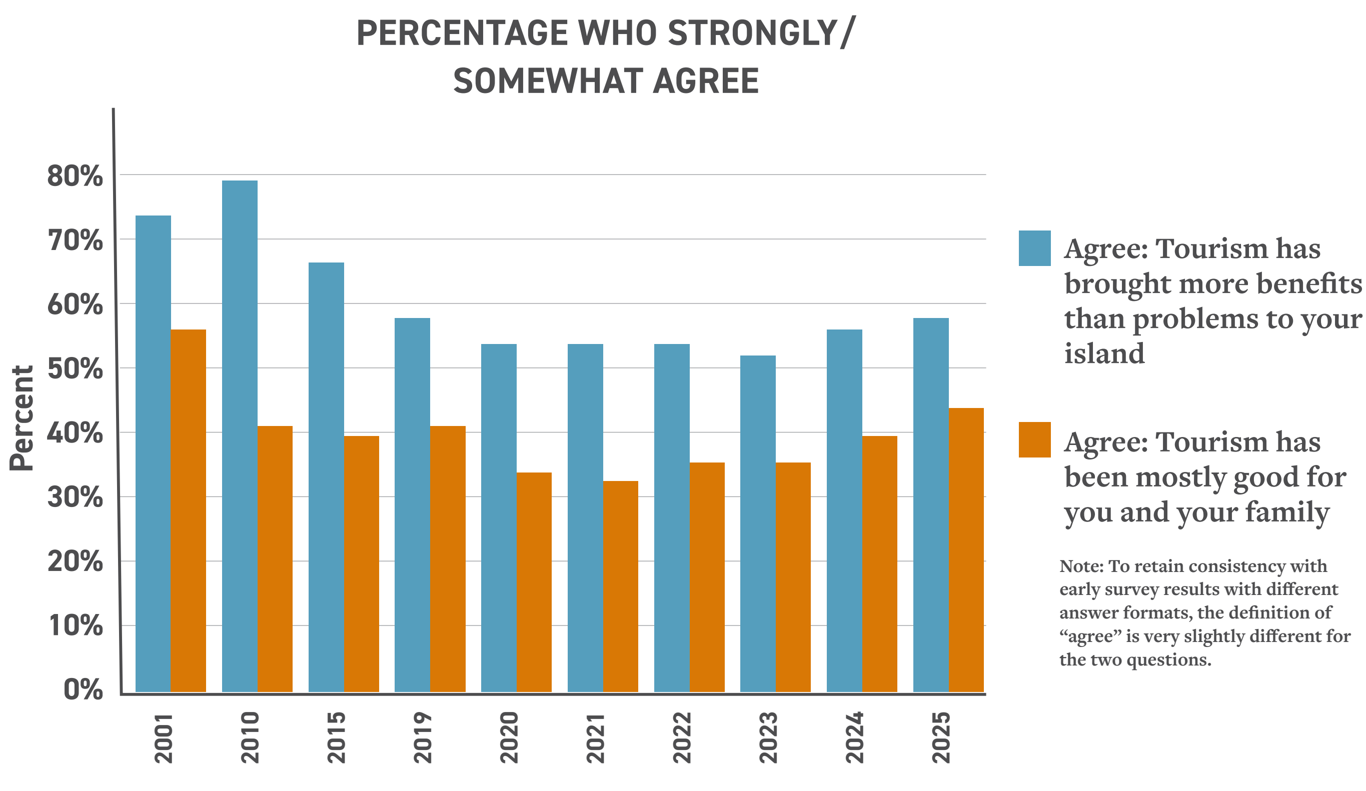
KEY PERFORMANCE INDICATORS
HOW WE WILL MEASURE SUCCESS

This strategic plan includes clear measures of success to track performance. Among these are five primary KPIs tied to reports compiled periodically by the DBEDT Tourism Research Branch. These include **Resident Sentiment, Visitor Satisfaction, Visitor Spending, Average Daily Visitor Spending** and **Increased HTA Funding**. Other success indicators will be drawn from other reliable sources tracked by HTA or new systems to be developed during this planning cycle.

This plan relies most heavily on Resident Sentiment and Visitor Satisfaction because residents and visitors are among HTA's most important constituents. Context for these important metrics is provided below.

Hawaiʻi Residents Are Growing More Positive About Tourism

Hawaiʻi resident sentiment toward tourism continued rising in 2025, with 58% saying tourism has brought more benefits than problems, up from 56% in 2024 and finally regaining pre-pandemic levels. The same survey showed considerably more residents — 55%, up from 47% in 2024 — were seeing more attention to balancing the economic benefits of tourism with resident quality of life.



Source: HTA/DBEDT Resident Sentiment Study

While the latest positivity rating remains well below the 80% recorded in 2010, when tourism pulled the state's economy from the Great Recession, Hawai'i's current resident sentiment ranks among the most positive of approximately 70 "mature destinations" tracked by Oregon State University's Sustainable Tourism Lab.

The Lab has followed attitudes about the relative benefits and costs of tourism over the past several years from about 370 global destinations, including several in the Pacific. Hawai'i's latest results were more positive than nearly 75% of "mature destinations," defined as places where growing tourism impacts have triggered community push back and constraints, such as funding cutbacks or tax increases.

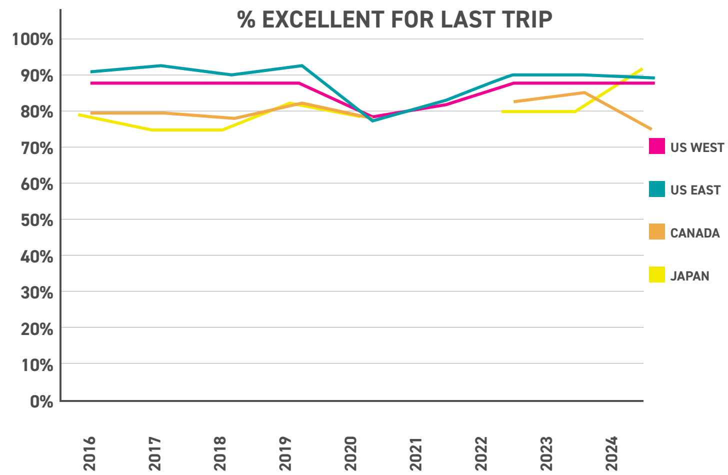
Most Hawai'i Visitors Are "Extremely Satisfied"

Extremely high percentages of Hawai'i visitors from four Major Market Areas (MMAs) typically rate their most recent trips as "Excellent." Allowing satisfaction to dip, however, holds serious consequences for any destination.

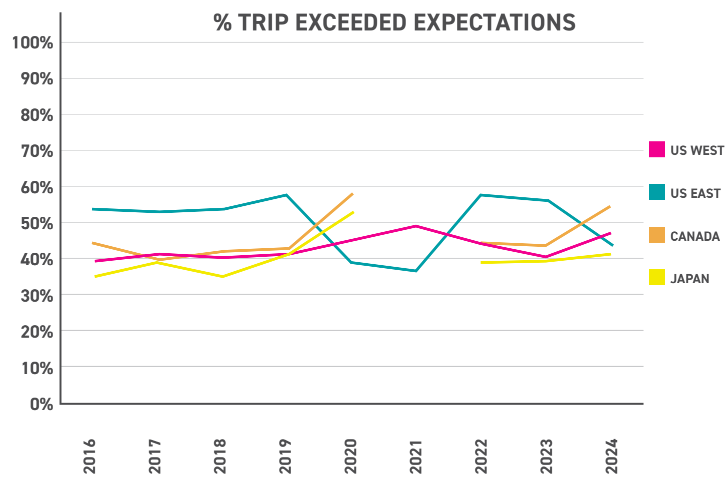
High satisfaction ratings matter because extremely satisfied visitors are far more likely to return and to refer a Hawai'i vacation to others. Personal referrals historically are the most powerful and cost-effective form of marketing.

Hawai'i visitors also are highly likely to say their trip "exceeded expectations." Researchers see this factor as among the highest predictors of a return visit.

Most likely to return, based on 2025 results, are travelers from Hawai'i's biggest source market, the U.S. West, with 81.3% "very likely" to revisit within the next five years. Those less likely to return typically cited the high cost of a Hawai'i trip, an interest in visiting other places, or the long distance to visit Hawai'i.



Source: HTA/DBEDT Visitor Satisfaction Survey



Source: HTA/DBEDT Visitor Satisfaction Survey

A FRESH START

Not since the HTA was formed in 1998 has the arrival of new leadership and a new governance structure coincided with the timing of a new strategic plan. This rare alignment of events creates a fresh opportunity to define our purpose and commitment to ensuring that Hawai'i's top economic driver is positioned to thrive and be a benefit to all who care about our islands.

To address past challenges and set a foundation for success, HTA will take decisive steps to enhance operational efficiency and accountability. We will establish clear measures of performance, establish a robust reporting process, and set defined targets in our yearly Strategic Tourism Management Plan to respond to the 2025 State Audit recommendations. Our commitment to fiscal responsibility will guide all vendor relationships as we refine our organizational structure to improve productivity and streamline decision-making. Strengthening procurement capabilities will be a priority, including investing time to optimize processes and cross-train staff. We will collaborate and communicate proactively to lead a broad partnership in support of a healthy tourism economy. Through these actions, HTA will demonstrate transparency, efficiency, and a renewed focus on delivering measurable results.

As we embark on this new five-year plan, both our U.S. and Hawai'i tourism economies are facing fresh economic worries. Unresolved conflict in the Middle East is driving uncertainty and sharp increases in the cost of fuel. Inflation remains above the Fed's 2% annual target. The loss of 92,000 U.S. jobs in 2025 has softened the labor market. Tariffs and other geopolitical forces dropped international arrivals to the U.S. by 5% to 6% in 2025, even as international tourism grew globally by 6% to 7%. New societal fault lines are emerging around a K-shaped economy. In March 2026, CoStar and Tourism Economics projected RevPAR growth of just 0.6% in 2026, driven by high-tier, luxury segments and major events like the FIFA World Cup, while lower-tier properties will face challenges. Without the World Cup, they said, U.S. hotel RevPAR would be up just 0.2%.

Here in Hawai'i, the latest state economic forecast predicted a nearly flat growth rate of 1.7% to 1.8% through 2027 that likely will be outpaced by inflation. The DBEDT first quarter 2026 Statistical and Economic Report noted falling visitor arrivals in 2025 were offset by rising visitor revenues. Although visitor arrivals dropped from 9.7 million in 2024 to 9.64 million in 2025, their spending rose 5.8%, increasing from $20.72 billion in 2024 to $21.75 billion in 2025. At the same time, statewide hotel occupancy improved from 73.3% in 2024 to 73.9% in 2025, indicating that visitors, while fewer in number, were staying longer and choosing hotels.


Hawaii Tourism Authority (HTA) / Blake Abes

Our 2025 resident sentiment survey showed 63% sharing concern about statewide impacts of the Hawai'i tourism economy's slow recovery. The same survey showed growing resident support for spending tax dollars both to manage tourism and to promote it. A total of 47% agreed "Tax dollars should be spent to ENCOURAGE tourism in my community," up sharply from 42% in 2024.

Because tourism is Hawai'i's single biggest economic driver, the success of our state economy depends largely on the success of the tourism economy. In late 2024, the DBEDT Research Division reported in its latest annual Tourism and Hawai'i Economy brief that direct and indirect visitor spending hit $23.9 billion in 2023, with total impacts accounting for 23.5% of Hawai'i's GDP. The next largest category was real estate and rentals, also heavily influenced by tourism.

The stakes for success are high, not just here but across the nation. Tourism organizations like ours — at state, regional, and city levels — are also strategizing on how to emerge as winners in these challenging times. The competition will be fierce. Though our brand is famous across the globe, Hawai'i does not "market itself." A September 2025 UHERO study of tourism industry perspectives, *Tourism in Hawai'i: Industry Views and Stakeholder Comparisons*, tied long-time underfunding of HTA's marketing budget to Hawai'i's declining competitiveness.

These new realities are why this plan points HTA back to the basics. We are sharpening our focus on these three strategic pillars to excel as a tourism government organization and provide for the long-term success of Hawai'i's visitor industry:

- **Brand Marketing:** To grow the economic value of Hawai'i tourism without stressing our islands' capacity, we will take steps to increase visitor spending at a faster rate than visitor volume. This "Value Over Volume" strategy rests on expanding our definition of a high-value traveler from those who earn more to those who spend more and do more — and inspiring them to visit, especially when we have available capacity. Our goal is not to attract just the most well-off travelers but to seek out those who spend above the average on their travels to pursue a special moment, a passion, or an experience. These may include those who travel for a sport or event, a honeymoon, business, wellness, a tour, a luxurious experience, or other interests to be defined through upcoming research. As in the past, we will seek those mindful high-value travelers inclined to share our own values and care for our home.
- **Experience Development:** To ensure that tourism delivers direct economic benefits to more Hawai'i residents, we will create a new focus on Experience Development. This area of focus will build on current community-based programs to create a comprehensive, community-first approach to connecting visitors with uniquely Hawai'i experiences, sports and events, local arts and culture, and "Hawai'i Made" products — and with the people who produce them. This work will play an important role in guiding development of "products" for the high value travelers we target.
- **Tourism Leadership:** To deliver on this plan and the many responsibilities entrusted to us, we will take immediate steps to build a strong organization prepared to execute on this strategic plan. But we know it takes many hands to build a healthy statewide tourism economy. We will affirm a spirit of collaboration in working on the challenges facing Hawai'i. Although we are not authorized to build housing and transit or even regulate vacation rentals, we will support solutions by those who do have that authority through policy and program development. We will tap into the expertise of our visitor industry and community partners to address big tourism challenges: rebuilding our attraction for key international and domestic markets and enhancing our competitiveness as a business travel destination, especially to re-fill our beautifully reimagined Hawai'i Convention Center after a two-year renovation. We will also collaborate with state and county partners to build a stronger tourism economy, especially to build and retain key air routes.

Each of these three strategic pillars represents an aspect of Destination Management, as defined in our governing statute, HRS 201B. Each also holds potential for the holistic practices of Destination Stewardship and fostering regenerative tourism. Our overall aim with this plan is to build a more successful, more competitive tourism economy for Hawai'i in harmony with the priorities and values of our residents, businesses, and visitors.

We also recognize that building Hawai'i's competitive position for travelers will require our state to make a greater investment in the tourism economy. Our intention with this plan is to make that case.

GUIDING PRINCIPLES

This plan expresses our commitment to strengthening the well-being of Hawaiʻi's people and places, reflecting the priorities of residents first while also supporting a strong and resilient visitor industry. It advances responsible travel as a means to protect what communities value most, fostering the right relationships between people, place, and prosperity so that tourism contributes to island life rather than defining it.

The fundamental strength of Hawaiʻi begins with aloha as lived, taught, and practiced by Hawaiʻi's people, in their communities and with the ʻāina. HTA's first strategic plan, Ke Kumu, identified nine principles based on Hawaiian values to guide HTA's work and achieve its goals. More than 25 years later these principles continue to guide us in honoring residents, protecting culture and environment, and inviting visitors to engage with respect.

HOʻOKIPA

(To entertain, treat hospitably; hospitable; hospitality)
To properly host visitors, whether invited or unexpected, is an important value in Hawaiian culture. Hawaiians of the past took great pride in hosting or entertaining visitors. We reaffirm our pride in hosting visitors from around the world with quality visitor experience.

LŌKAHI

(Agreement, unity, harmony or accord)
The figurative translation refers to a group working together toward a common goal, with that common goal having a positive benefit for all. Likewise, the HTA values local community involvement in defining and planning a successful tourism industry so that it supports the quality of life for Hawaiʻi's residents.

PŪLAMA I KA HOʻOILINA

("Cherish the Heritage")
Hoʻoilina means legacy and pūlama means care, cherish, or treasure. For HTA, this phrase refers to caring for the legacy that will be handed down to future generations and supporting the preservation of Hawaiʻi's unique cultural heritage, which has shaped Hawaiʻi's history and identity.

ALOHA ʻĀINA

("Love of the Land")
In caring for the land and ocean, the Hawaiians of old viewed themselves as stewards of the land and ocean, which sustained all life. Therefore, HTA recognizes the importance of preserving Hawaiʻi's fragile natural environment and natural resources to sustain future generations of residents and visitors.

ALAKAʻI

(To lead, guide or direct and/or refers to a leader, guide, or conductor)
The HTA recognizes Hawaiʻi's potential to be the premier training and educational center for the tourism community and for students in Hawaiʻi and around the world.

HOʻOULU

(To grow, to inspire)
The HTA desires to be a building block for growth and diversification of local products as an export into the worldwide distribution system.

HOʻOKAHUA

(To build a foundation; also infers developing stability over the long haul)
The HTA will strive to build a foundation that encourages and supports product growth, diversification, and a diversified visitor mix. This foundation will (a) support a broader range of products and services within the local business community; and (b) serve the long-term business and economic cycles impacting the health and welfare of Hawaiʻi's residents.

PALEKANA

(Safety)
A core value of HTA is to maintain a safe and secure environment for all residents and visitors.

HE KŪLANA I MAHALOʻIA

(A position of admiration or appreciation)
The HTA shall strive to earn the respect of the people by its contribution to the state and the community.

Hawaii Tourism Authority (HTA) / Tor Johnson

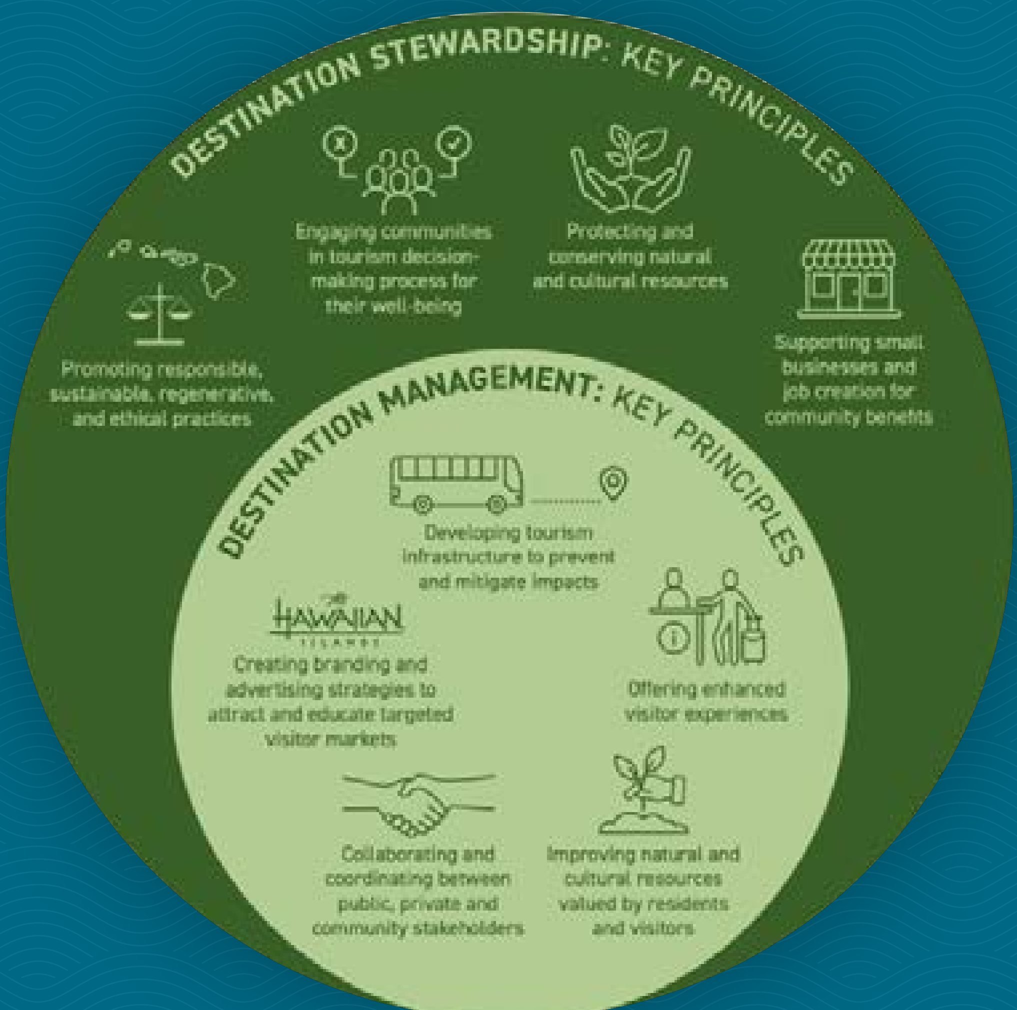
KEY CONCEPTS

DESTINATION MANAGEMENT.
HTA defines this term in accordance with our governing statute, HRS Chapter 201B -1. Destination management means a collaborative and coordinated process with public, private, and community stakeholders to manage the various elements of a visitor destination to:

1. Create, implement, and monitor strategies that attract targeted visitor markets and improve visitor experiences;
2. Improve natural and cultural resources valued by Hawai‘i residents and visitors;
3. Develop and maintain tourism-related infrastructure to prevent overcrowding and overtaxing sites and resources; and
4. Ensure that the provision of services enhances the visitor experience.

DESTINATION STEWARDSHIP.
Destination stewardship in Hawai‘i emphasizes a regenerative tourism approach, ensuring the islands' stunning natural beauty, rich cultural heritage, and vibrant communities thrive for generations to come. By balancing the needs of residents, visitors, and businesses, we create a flourishing economic future. Key to this is destination management, which focuses on elevating visitor experiences and generating revenue while safeguarding Hawai‘i's unique identity. Collaboration among all levels of government, industry stakeholders, and the community is essential for both stewardship and management.

Destination Management and Stewardship



EXPERIENCE DEVELOPMENT.
The process of transforming a tourism destination's attributes into immersive, emotional, and participatory activities. The intent is to shift focus from travel logistics to building a destination's appeal on memorable, authentic experiences that drive deeper engagement in local culture and environment, resulting in higher visitor satisfaction, longer stays, and increased local economic benefits. A related goal is to attract and retain targeted visitors who contribute to the destination's well-being while creating experiences for residents to enjoy as well.

HIGH-VALUE TRAVELERS. This term refers to traveler segments targeted by our marketing or sales tactics. Typically, these are travelers who are likely to spend more per trip. These may include international, MCI, luxury, wedding, sports/events travelers, and other categories. By targeting these travelers, we can generate greater economic impact (value) without large increases in visitor numbers (volume). A high value can also be placed on visitors who show desirable behaviors, such as mindfulness or a willingness to visit multiple islands and stay in hotels. Many Hawai'i visitors may not fit these definitions because not all who visit are targeted by our marketing.

KEY PERFORMANCE INDICATORS (KPIs).
Measurements are established to track the performance of a strategy or plan. This Strategic Plan identifies an Objective for each of the three core Pillars that includes at least three KPIs. Additional performance measures are embedded in the plan's Strategies and Tactics.

REGENERATIVE TOURISM.
HTA defines regenerative tourism as a tourism model that:
1. Is designed and carefully managed to bring net benefits to local communities and destinations; and
2. Implements an innovative and sustainable economic development plan to:
(A) Make net positive contributions;
(B) Create conditions that allow communities to flourish;
(C) Engage in collaborative efforts that provide visitors with genuine and meaningful experiences in Hawai'i; and
(D) Improve destinations for current and future generations for the well-being of the environment, residents, and indigenous communities.

Key Principles of regenerative tourism in Hawai'i include:

HOW THIS PLAN WAS CREATED

The 2026-2030 Strategic Plan is the first to be created in parallel with six new island-based Destination Management Plans (DMAPs).

Building on months of outreach and evaluation of past plans, HTA convened and facilitated **more than 30 input sessions** with industry and community participants on the islands of Hawai'i, Kaua'i, Lāna'i, Maui, Moloka'i, and O'ahu from August to November 2025. These virtual and in-person input sessions prompted participants to share their hopes for Hawai'i tourism in the next five years and reflect on paths for improvement. HTA also fielded two statewide surveys, one for community members and another for industry stakeholders.

Other strategic plan findings and initiatives stemmed from data-driven research, our strategic planning team's extensive destination experience, and **more than 50 confidential interviews** with a wide range of stakeholders recommended by HTA. This includes state government executives, legislators, state agency directors, all HTA Advisory Board Members, past HTA Board members, visitor industry leaders, county economic development officials, academics, and HTA vendors. (See Acknowledgements for full list of interviewees.)

Facilitated input sessions were held with HTA staff and our long-time marketing partner, the Hawai'i Visitors and Convention Bureau (HVCB). Findings were incorporated into an extensive **Situation Analysis.**

Lastly, this plan includes a section describing the **Legal and Statutory Framework for Each Strategic Pillar.** This section aligns HTA's statutory mandates with the three Strategic Pillars. (See page 41.)

The Governor's office, Director of DBEDT, and the HTA Advisory Board reviewed and approved this plan prior to publication.

Hawai'i Tourism Authority (HTA) / Ben Ono

HTA ANNUAL WORK CYCLE

The HTA has a dynamic work cycle that begins with gathering research and market intelligence. This information helps shape HTA's direction within each of the major market areas (MMAs) while balancing the need to optimize the industry's contributions to Hawai'i's communities. In addition, reviewing program evaluation measures and reports assists in developing visitor experiences, destination management, and workforce programs.

Research. Research provides the foundation for HTA to formulate its plans for the sustainability of Hawai'i's tourism industry. The HTA uses market intelligence along with historical and current visitor data, accounting for seasonal trends, demographics, competition, and economic conditions.

HTA Strategic Plan. The HTA Strategic Plan (HTASP) serves as a roadmap to address medium- and long-term goals to achieve Key Performance Indicators (KPIs). These goals are based on research data, market intelligence, input from industry and community meetings, and collaboration with industry and community.

Strategic Tourism Management Plan. The Strategic Tourism Management Plan (STMP) is the HTA annual action/tactical plan and details initiatives and programs to achieve KPIs. The budget is formulated in conjunction with the STMP, and targets are established to measure progress towards HTASP goals and priorities.

Execution. The HTA's global marketing teams develop their annual marketing plans, based on HTA directives for the MMAs and their respective markets' current trends and conditions. The HTA also ensures that its destination management action plans are implemented effectively. Additionally, annual procurements and programs are executed per the STMP.

Evaluation #1. To optimize performance outcomes, HTA reassesses its KPIs by monitoring research data and drawing from market intelligence. Global marketing contractor initiatives are reviewed semiannually. HTA also reviews its other visitor experience and destination management programs to determine whether benchmarks are being met.

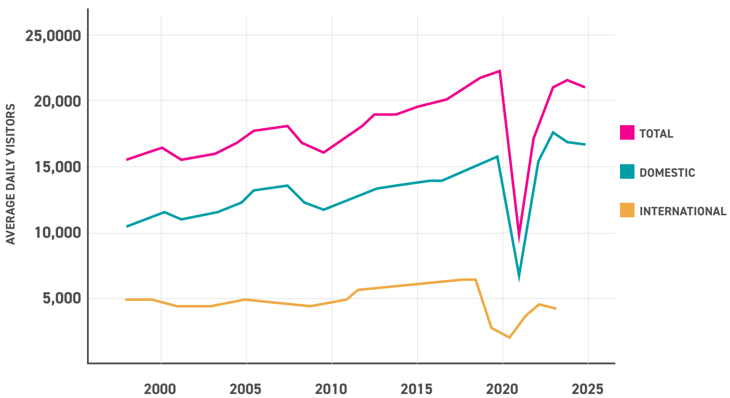
Adjustments. The first evaluation provides an opportunity for HTA and its marketing contractors to regroup and review current market trends and economic conditions and make necessary adjustments to its marketing plans to achieve its objectives. The HTA also collaborates with its other program contractors and partners to make adjustments to those plans and programs as needed.

Evaluation #2. At the end of the year, the HTA evaluates the effectiveness of its initiatives by analyzing market research and intelligence alongside program outcomes. This evaluation informs decisions to refine, retool, and implement in the following year's STMP.

THE STATE OF HAWAIʻI TOURISM
KEY INSIGHTS

Important considerations for HTA's 2026-2030 Strategic Plan arose from extensive desktop research, industry and community input sessions, survey results, and confidential interviews with more than 50 key stakeholders. Significant findings are shared below.

Average Daily Visitor Census (1998-2024)



Source: HTA/DBEDT Visitor Statistics

- **Although Hawaiʻi's overall visitation remains short of the record 10.2 million who arrived by air in 2019, domestic visitation surged past 2019 levels in 2022 and was up by 8.9% over 2019 in 2024.** However, DBEDT Visitor Statistics show visits from one of Hawaiʻi's most valuable segments — international travelers — remained 45.2% below 2019 levels in 2024. DBEDT's recent quarterly economic forecast projected that visitor arrivals will crest 10 million in 2029 for the first time since 2019. This signals an imperative to ensure that growing visitation is managed in keeping with local priorities.

- **A wide range of stakeholders supports targeting a higher-spending visitor to generate economic growth with limited growth in overall visitation.** Industry, community, and government leaders alike see value in controlling growth while increasing economic impact from visitor segments with above-average expenditures. This approach also recognizes the reality that Hawaiʻi costs more than many other island and U.S. destinations. Industry leaders caution, however, that targeting higher-spending visitors will require investment in outdated infrastructure so that the quality of the visitor experience matches expectations for a high-end destination.

- **Expectations for full recovery of U.S. MICE (Meetings, Incentives, Conferences, Exhibitions) tourism during 2025 have faded,** based on uncertainty about tariffs and rising costs. In early October 2025, a U.S. Travel Association forecast projected just 1.4% growth in domestic business travel during 2025, with inflation-adjusted spending at 88% of 2019 levels. Even lower projections were shared for group business travel, with spending at just 85% of 2019 levels in 2025, rising to 94% by 2029. Transient business travel was seen as recovering faster, but U.S. Travel foresees an even slower recovery for international group business travel, with spending projected at just 70% of 2019 levels in 2025 and rising to 84% by 2029. This less optimistic outlook may require the reimagined Hawaiʻi Convention Center to market more aggressively to fill expanded meeting and event spaces when it reopens in 2028 following two years of renovation.

- **A persistent belief that "Hawaiʻi markets itself" is often cited to explain or justify the state's reluctance to fund marketing.** The importance of marketing to attract targeted travelers, stimulate demand in slow periods, drive recovery, and overcome competition is not well understood. While several industry leaders call for raising awareness of the economic value of tourism, the Resident Sentiment Survey shows residents already are well-aware that tourism supports jobs and business vitality. The Spring 2025 survey shows 80% agreeing that tourism "creates job opportunities for residents" and 81% agreeing that tourism "supports our local businesses like retail, dining, etc."

- **There is a growing understanding that some resident dissatisfaction stems from a lack of transparency around how tourism tax revenues are spent.** The Spring 2025 Resident Sentiment Survey shows that many residents perceive little direct benefit from tourism in their daily lives, even though visitor spending — from the Transient Accommodations Tax (TAT) and the state's General Excise Tax — funds a substantial portion of state and county budgets. Transparent allocations of Hawaiʻi's new "Green Fee" will provide both an opportunity to highlight the value of tourism for residents and to thank visitors for the tangible improvements their dollars are funding.

KEY INSIGHTS

- **Concerns are growing that the health of Hawai'i's visitor economy has been impacted by a loss of aloha.** Findings of MMGY's Portrait of the American Traveler survey in summer 2025 show an uptick — from 11% in 2024 to 13% in 2025 — among those who say, "I have heard/read that people in Hawai'i are opposed to visitors coming." It will be important to assess the depth and root causes of this growing risk and, if warranted, develop a strategy for turning around negative perceptions of Hawai'i travel before they become even more widespread and difficult to reverse.

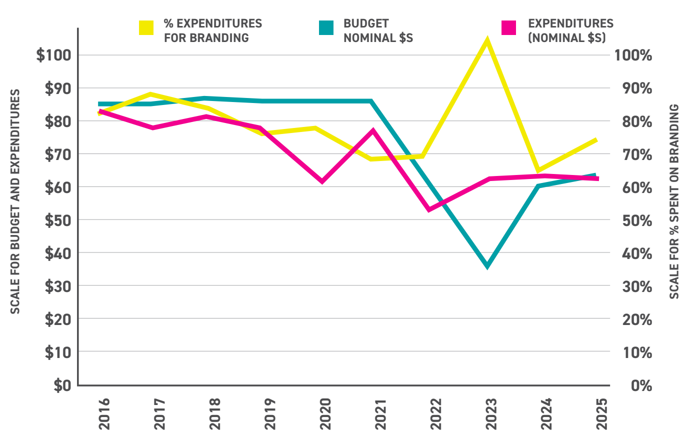
- **New Datafy research into traveler behavior shows U.S. travelers prioritizing spending on experiences over typical trip logistics.** Analyzing more than 90 million travel-related credit card transactions, Datafy found travelers allocating more of their trip budget over the past year for leisure, recreation and entertainment while the share of spending for accommodations and dining and nightlife declined. Shopping, especially specialty retail, gained an even larger share of trip budgets. While cost remains travelers' biggest concern, Datafy notes they are managing their budgets to protect experiences, indicating that destinations should be accentuating experiences, events, and attractions in trip planning and marketing.

- **Hawai'i began fostering community-rooted regenerative practices long before the term became popularized, but the concept is still widely misunderstood.** While HTA and other Hawai'i organizations have embraced regenerative tourism as a policy model bringing net benefits to local communities, recent research shows that businesses see it as more of an "add-on" than a new way of doing business. Adoption also has been limited by a lack of understanding. Many Hawai'i stakeholders mistakenly believe regenerative tourism centers on voluntourism. A deeper cross-sector collaboration is needed to achieve alignment on the value of a regenerative tourism ecosystem for Hawai'i.

- **Many, including lawmakers, see opportunity in creating a tourism economy that keeps more dollars in Hawai'i and in the pockets of residents.** Despite the substantial revenue generated from tourism — with approximately 13% of the state's budget coming from the Transient Accommodation Tax (TAT) and visitor-generated General Excise Tax — many residents express a desire to see more direct benefits of tourism in their daily lives. This concern emerges in the Resident Sentiment Study and was shared in island input sessions conducted for this plan. Although DBEDT's 2017 Input-Output Model shows that 81 cents of every visitor dollar spent in Hawai'i circulates within the Islands, many residents believe tourism proceeds and profits go mainly to offshore companies rather than staying in Hawai'i.

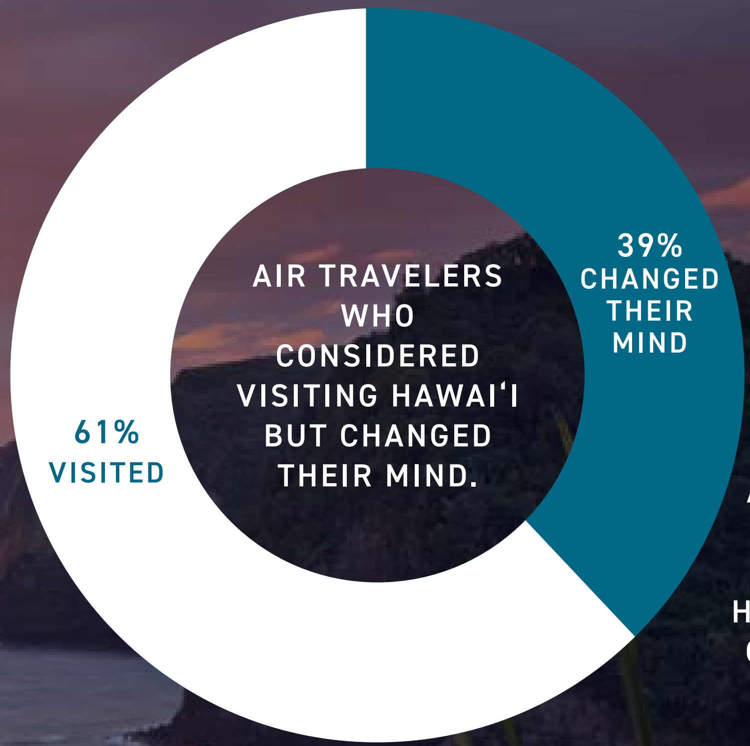
- **HTA's statewide industry survey and interviews with industry leaders identified deep concerns about Hawai'i's declining competitiveness, especially for leisure travelers. These findings were corroborated by a September 2025 UHERO study of tourism industry perspectives, tying the loss of competitiveness in part to long-time underfunding of HTA's marketing budget.** The UHERO report noted that HTA's 2025 U.S. marketing contract totaled $14.4 million, far below top competitor Mexico's $50 million U.S. marketing budget. Two other major competitors — Florida and California — both have far larger U.S. marketing budgets than Hawai'i as well. An April 2025 report by HTA research vendor SMARInsights demonstrated how a $3 million cutback in HTA's 2024 media buy for U.S. markets cost the state more than $1.2 billion in spending by "ad-aware" visitors, who outspend non-aware visitors. (See details in "Why Marketing Matters" on page 39).

Change in HTA Budget, Expenditures, Brand Spending FY2016-FY2025



Source: HTA Annual Reports and Records

THE COST TO VISIT HAWAIʻI CONTINUES TO BE THE MOST CITED DETERRENT TO VISITING.



A GROWING CONCERN: MORE TRAVELERS ARE HEARING THAT HAWAIʻI RESIDENTS ARE OPPOSED TO VISITORS COMING.

REASONS FOR NOT VISITING HAWAIʻI - AMONG AIR TRAVELERS WHO CHANGED THEIR MIND	2023	2024	2025
PRICE OF AIRFARE	40%	37%	39%
PRICE OF THE VACATION PACKAGE	32%	30%	32%
PRICE OF HOTEL	32%	30%	31%
BETTER VALUE AT ANOTHER DESTINATION	22%	27%	26%
THE FLIGHT TO HAWAIʻI IS TOO LONG	23%	24%	23%
BEEN TO HAWAIʻI BEFORE, WISH TO TRY ANOTHER DESTINATION	12%	13%	17%
I DON'T HAVE ENOUGH TIME TO TRAVEL TO HAWAIʻI	18%	10%	14%
I HAVE HEARD/READ THAT RESIDENTS ARE OPPOSED TO VISITORS	13%	8%	14%
HURRICANES AND TROPICAL STORMS HITTING HAWAIʻI	NA	11%	13%
NOT SURE WHICH ISLAND(S) IN HAWAIʻI TO VISIT	9%	8%	11%
I CAN FIND HIGHER QUALITY ENTERTAINMENT AT OTHER DESTINATIONS	9%	9%	10%
ACCOMMODATIONS WERE NOT AVAILABLE	NA	8%	10%
HAVE HEARD RENTAL CARS ARE LIMITED OR NOT AVAILABLE	9%	7%	10%
HAWAIʻI IS NOT UNIQUE AND DIFFERENT ENOUGH FROM OTHER DESTINATIONS	NA	7%	10%
NOT ENOUGH ACTIVITIES IN HAWAIʻI THAT INTEREST ME	7%	6%	9%
HAWAIʻI IS NOT EXOTIC ENOUGH	NA	4%	7%
NOT ENOUGH DINING OPTIONS AT A PRICE POINT I CAN AFFORD	6%	5%	5%
I DO NOT FEEL COMFORTABLE VISITING HAWAIʻI AT THIS TIME	NA	7%	4%
DUE TO THE FIRES IN MAUI	NA	4%	3%

SOURCE: MMGY 2025 PORTRAIT OF AMERICAN TRAVELERS, SUMMER EDITION.

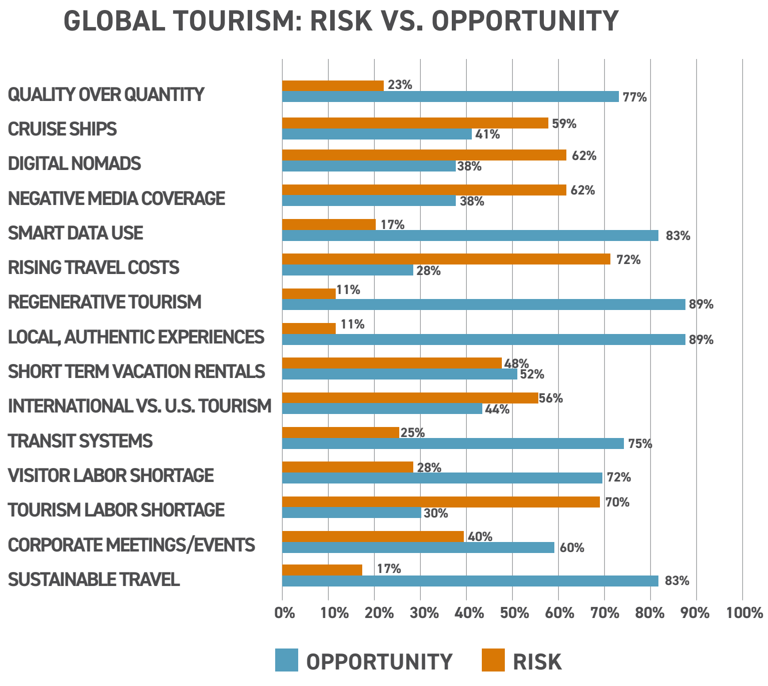
Hawaii Tourism Authority (HTA) / Tyler Schmitt

KEY INSIGHTS

Risks and Opportunities
Significant attention was devoted throughout the planning process to identifying risks and opportunities for Hawai'i tourism. This included a detailed PESTLE Analysis, using a well-established framework to systematically review the Political, Economic, Social, Technological, Legal, and Environmental forces shaping the global tourism landscape.

To gain Hawai'i perspectives, various groups of stakeholders, including HTA staff and Advisory Board members and HVCB leadership, were asked to rate global tourism trends as either risks or opportunities for Hawai'i tourism. Results from all groups were highly similar, indicating strong alignment across a wide range of stakeholders. Below are results from a similar question included in the HTA Community Survey fielded in August 2025.

Q: Below are some global tourism trends. For each one, do you think it is mostly an opportunity or a risk for tourism on your island?



Source: PPRC/HTA Community Survey, Aug 2025

A TOP RISK

Hawai'i's lodging tax was among the highest in the U.S. in 2025, with Honolulu's overall tax rate of 17.96% ranking fifth among the nation's 25 most-visited destinations and well above their average rate of 16.11%. With Hawai'i's "Green Fee" taking effect Jan. 1, 2026, the state's lodging tax climbed another 0.75%.

The comparisons come from the 2025 Lodging Levies & Rates study by the U.S. Travel Association and Civitas, which creates innovative funding solutions for destination organizations globally.

The 2026 rate breakdown for Honolulu, which is standard across Hawai'i, totals to 18.71%,. including:

- State Transient Accommodation Tax (TAT) of 11% (including the "Green Fee").
- County TAT of 3%.
- State General Excise Tax (GET) of 4.21%, and
- County GET of 0.50%.

A TOP OPPORTUNITY

Although Hawai'i's high lodging tax rate puts it at a competitive disadvantage, especially for attracting meetings, conventions and incentive (MCI) travel, the newest component of its lodging tax holds a silver lining. Allocations of the new 0.75% "Green Fee" will channel an estimated $60 million to $100 million annually into projects addressing climate impacts and improving infrastructure for both Hawai'i residents and visitors beginning in 2026.

These allocations also provide HTA with a rare opportunity to highlight the value of tourism for residents and to thank visitors for the difference they are making.

It will be important for HTA to develop a thorough communications plan to inform both residents and visitors of how the state accommodations tax is building Hawai'i's climate resilience while improving key visitor assets for all to enjoy. Like New Zealand and others, Hawai'i can use this kind of messaging to build stronger relationships between visitors and residents.

STRATEGIC PILLAR 1

BRAND MARKETING

HTA is the state agency responsible for promoting and marketing Hawaiʻi to targeted travelers.

I maikaʻi ke kalo i ka ʻohā.

"The goodness of the mature kalo is judged by the ʻohā or offspring."

The life-giving kalo plant reminds parents they will be known by the way their children grow and develop. Just as parents have a kuleana to nurture and guide their children, HTA must shape the Hawaiʻi brand to inspire beneficial returns and positive emotional connections for Hawaiʻi.

OBJECTIVE

Differentiate Hawai‘i through branding that recognizes our unique culture and local values, drives economic vitality, and respects community needs. Attract well-defined, high-value visitor segments with targeted marketing strategies that deliver measurable, high returns on investment.

WHY?

For both community and industry, sustained investment in effective brand and targeted marketing is necessary to generate increased revenue for state and county governments and the business sector. Along with destinations across the U.S., Hawai‘i is impacted by a decline in international arrivals and a slower-than-expected recovery of business travel. On top of that, Hawai‘i faces strong competition from better-funded, less expensive beach and island destinations, a shrinking airline seat inventory, growing threats to cruise activity, and a two-year pause on hosting citywide conferences. To build economic vitality without stressing our capacity for visitors, it is imperative to double down on attracting traveler segments with above-average trip spending and strong alignment with community values. It will be equally important to differentiate our greatest attribute — our unique Hawai‘i experience — through strong, values-aligned branding.

KEY PERFORMANCE INDICATORS

- **GROW AVERAGE DAILY VISITOR SPENDING** (ADVS).
- Annual growth rate of **VISITOR SPENDING OUTPACES GROWTH RATE OF VISITOR ARRIVALS.**
- Increase **RETURN ON INVESTMENT FOR ADVERTISING** (dollars spent on media) on spending and tax revenue from “ad-aware” visitors.
- Drive **INCREASED INTENT TO TRAVEL** in Major Market Areas.
- Increase **VISITOR SPENDING AND VISITOR ARRIVALS IN SHOULDER SEASONS** to generate activity without straining capacity.

STRATEGIC PILLAR 1

STRATEGIES AND TACTICS

1. Identify and focus marketing outreach to include more higher-spending, high-value traveler segments.

- Conduct a brand and market segmentation study to validate and identify productive high-value market segments, Hawai‘i’s readiness to compete for them, and the relevance of high-potential segments for each island according to local community values.
- Develop personas for each segment so everyone can understand who HTA is targeting.
- Refine ongoing targeted market segments, such as romance, avid traveler, and others.
- Initiate marketing co-ops to sustain and build air service in key international and domestic markets.
- Place more emphasis on the higher-spending U.S. East market to stimulate increases in Average Daily Visitor Spending.
- Inspire visitors to experience more events and attractions to drive additional visitor spending.
- Moderate visitor flows in peak travel seasons and stimulate visitation during slower periods.
- Drive efficiencies in market segmentation through a digital-first strategy.
- Provide Hawai‘i-based visitor industry partners with opportunities to share targeted advertising on GoHawaii.com and other owned HTA communication channels.

2. Energize the Hawai‘i brand.

- Use the brand and market segmentation study to carve out a distinctive position for Hawai‘i among competing “sun and sand” destinations, invigorate the Hawai‘i brand, update brand guidelines, and identify product development needs and opportunities.
- Relaunch GoHawaii.com with modern tools and technology, such as artificial intelligence, to provide visitors with a powerful, seamless user experience for exploring and planning a trip to Hawai‘i and position the website as a leader for digital-first marketing.
- Collaborate with DBEDT’s Creative Industries Division to further differentiate the Hawai‘i brand and enliven marketing and promotional activities.
- Strategically promote film and TV locations through integrated storytelling and partnerships that convert on-screen visibility into visitor inspiration and demand.

3. Strengthen Hawai‘i’s global competitiveness for Meetings, Conventions, and Incentives (MCI) travel.

- Lead a task force of industry stakeholders to create a long-term plan to build Hawai‘i’s competitive position for MCI travelers, using the reimagined Hawai‘i Convention Center as a launchpad for growth and a leading destination for sustainable conferences.
- Highlight Hawai‘i’s unique cultural identity in branding to differentiate from other destinations.
- Determine an appropriate level of citywide conference incentives for the convention center to remain competitive in the MCI marketplace and improve Hawai‘i Convention Center profitability.
- Focus MCI sales strategy on Hawai‘i’s core competencies and DBEDT’s targeted key growth economic clusters to attract conferences and meeting attendees aligned with Hawai‘i’s business strategy.
- Increase recruitment of incentive trips and meetings during the convention center renovation to mitigate loss of future business and build interest in the re-launch.

4. Identify optimal distribution of visitation and high-value traveler segments for each island.

- Collaborate with island communities to prioritize attributes of each island for promotion, differentiate each island experience, stimulate interisland travel, and reflect local priorities for visitation.
- Leverage attraction and development of visitor experiences, infrastructure for international markets, and tours — especially growing interest in domestic tours — to stimulate interisland visitation and responsible travel.

STRATEGIES AND TACTICS

5. Educate and engage all visitors to travel responsibly throughout Hawai‘i.

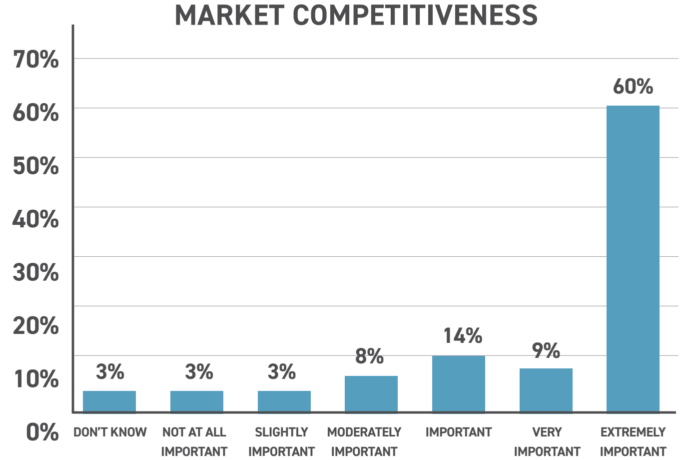
- Integrate pre- and post-arrival messaging efforts into a single branded campaign for greater impact and consistency.
- Partner with hotels, attractions, and airlines to educate visitors about desirable Hawai‘i travel practices before and after arrival.
- Collaborate with the Department of Land and Natural Resources (DLNR) and other stakeholders to identify top messaging priorities for visitors. Develop and distribute relevant messages for HTA and partners to share.
- Explore the use of artificial intelligence to identify and correct misinformation on social media.

ADDITIONAL MEASURES OF SUCCESS

Monitoring these additional indicators will provide further insights into outcomes of the strategies and tactics above. Results will be shared in HTA’s annual report to the legislature.

- **International visitation:** Increase the proportion of international to domestic visitors (In 2024, 17% of visitors were international)
- **Market segmentation:** Use campaign effectiveness studies to show above-average spending for each targeted segment.
- **MCI growth:**
  - Number of events
  - Mixture of events
  - Room nights
  - Cost per person per day spent at Hawai‘i Convention Center
  - Intent to return
  - New businesses (have not been to Hawai‘i in 7 years)
- **Campaign effectiveness:** HTA marketing ROI rated “above average” among U.S. destination organizations.
- **Visitor Message Recall:** Increase percentage of visitors who recall hearing or seeing information about “Safe and responsible travel” and “Caring for People, Environment, and Culture” both pre-arrival and during trip.
- **Increase in first time visitors** from 2025 to 2030.

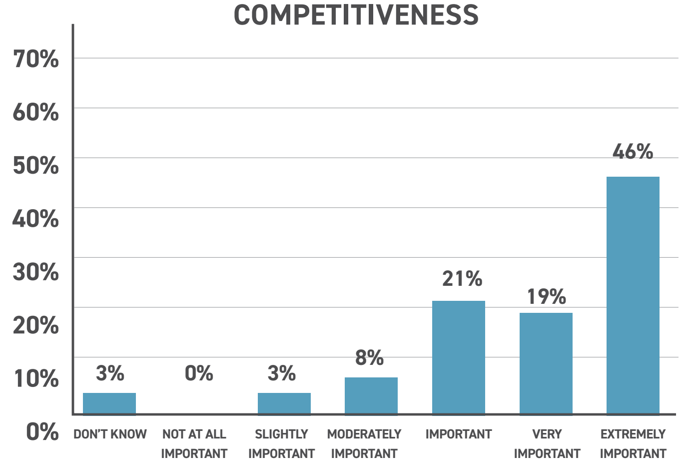
IMPORTANCE OF LEISURE MARKET COMPETITIVENESS



A large majority of industry respondents agree it’s “extremely important” to improve Hawai‘i’s competitiveness for leisure travelers.

Source: PPRC/HTA Industry Survey, Aug 2025

IMPORTANCE OF MCI COMPETITIVENESS



Industry respondents also endorse the importance of building competitiveness for MCI travelers, with 65% saying it’s “very” or “extremely” important.

Source: PPRC/HTA Industry Survey, Aug 2025

STRATEGIC PILLAR 1
BRAND MANAGEMENT

WHAT IS A HIGH-VALUE TRAVELER?

In recent years, HTA's definition of a high-value traveler has centered on higher-income households whose buying habits show sensitivity to natural resources, culture, and people. We call them our High-Value Mindful Hawai'i Travelers.

With this plan, we expand our focus to include purpose-driven travelers who may not earn the most but outspend other types of travelers to pursue an interest, whether for a sport or event, wellness, business, luxury, or to reduce their carbon impact. New research will point us to the highest-potential travelers. This will be a path to generating more economic impact from fewer visitors.

DBEDT's 2024 Visitor Statistics already show that business travelers' average daily spend of $302.50 in 2024 outpaces the leisure travelers' average spend of $238.30. One of our highest-value visitors of all is honeymooners, who spent $337.70 per day.

Typically, the farther a visitor travels to Hawai'i, the more they spend. U.S. East travelers spent an average of $264.60 per person per day in 2024, well above the average $244.70 for all travelers and $229.80 for U.S. West travelers — and for many international markets as well. Plus, nearly 20% of U.S. East visitors spread their dollars across multiple islands, and almost 40% visit Neighbor Islands.

China and Korea provide our highest-value international travelers, with average daily spends in 2024 of $353.37 and $318.57, respectively. Though relatively few in number, more than 80% stay in hotels. Visitors staying in hotels spend more on average ($281.50 in 2024) than those who pick condos ($247.60) or rental houses ($243.90) and far more than those staying in timeshares or with friends.

Hawaii Tourism Authority (HTA) / Ben On

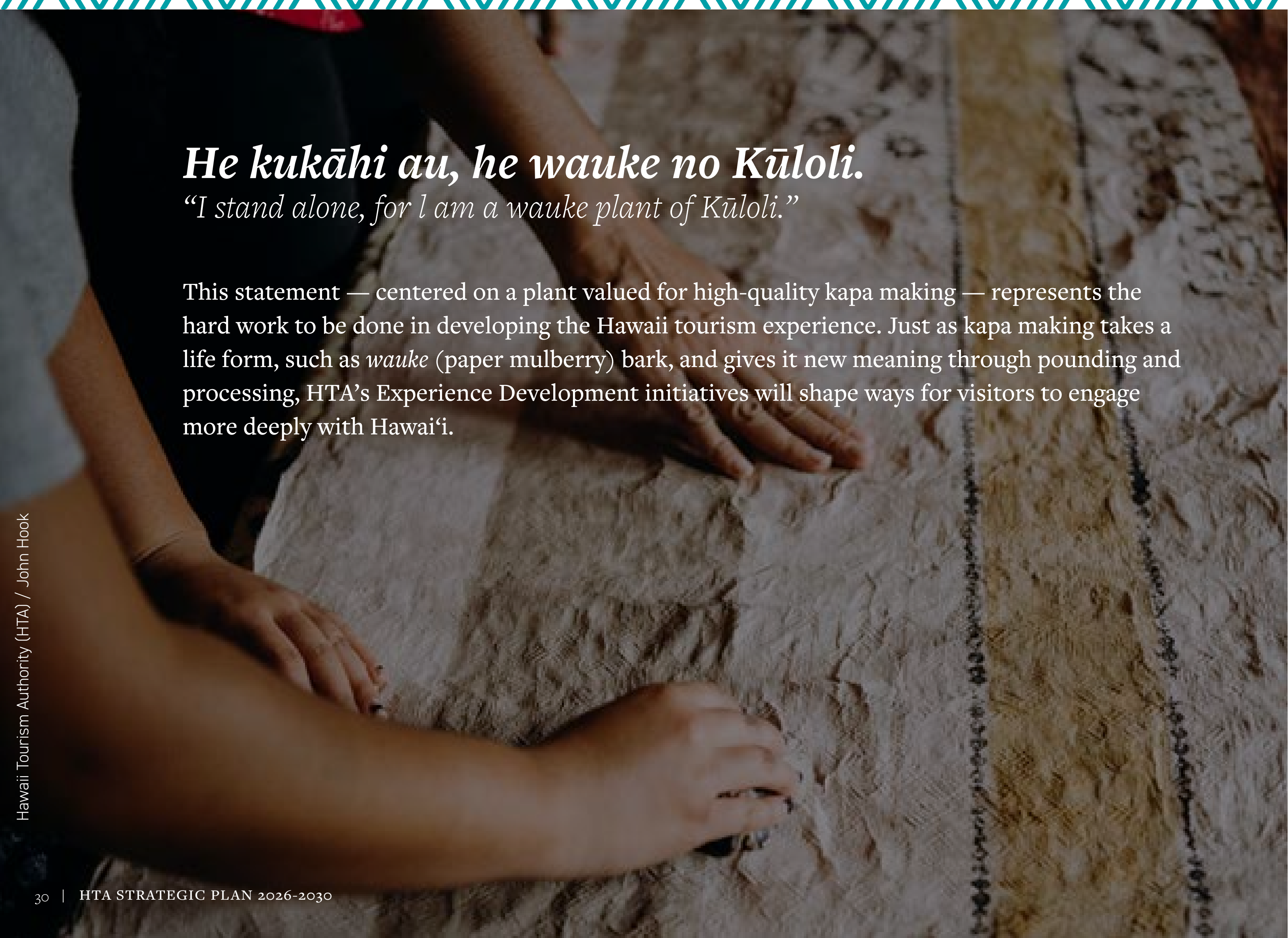
One of Hawai'i's highest-value traveler segments: Honeymooners.

Hawaii Tourism Authority (HTA) / Heather Goodman

STRATEGIC PILLAR 2

EXPERIENCE DEVELOPMENT

HTA's statutory responsibilities include improving visitor experiences and services in ways that generate "net positive" benefits for residents.



He kukāhi au, he wauke no Kūloli.

"I stand alone, for I am a wauke plant of Kūloli."

This statement — centered on a plant valued for high-quality kapa making — represents the hard work to be done in developing the Hawaii tourism experience. Just as kapa making takes a life form, such as *wauke* (paper mulberry) bark, and gives it new meaning through pounding and processing, HTA's Experience Development initiatives will shape ways for visitors to engage more deeply with Hawai'i.

Hawaii Tourism Authority (HTA) / John Hook

OBJECTIVE

With a "community-first" focus, develop sustainable and regenerative visitor experiences that revitalize communities, create economic opportunities, and address the interests of high-value visitors.

WHY?

Experience development is a path to connecting more local businesses, outfitters, artists, makers, growers, and producers to the tourism economy while satisfying rising traveler demand for uniquely Hawaiian experiences. It further differentiates Hawai'i against its competitors, expands our array of visitor experiences, and creates new reasons for high-value travelers to visit more islands. It can stimulate demand for other sectors, such as agriculture and arts and culture, channel opportunities to places seeking revitalization, ease pressure on places experiencing strain, and safeguard natural resources. By aligning community-based programs and regenerative tourism efforts into one focused initiative, HTA can support product development and technical assistance with greater impact, giving more local entrepreneurs and communities a stake in tourism while creating new ways for visitors to contribute to local economies.

KEY PERFORMANCE INDICATORS

- Improve **VISITOR SATISFACTION** ratings for "Exceeded Expectations."
- Improve **RESIDENT SENTIMENT** by rising agreement with "Tourism is being better managed on my island" and "HTA actively works to manage tourism in our state through its DMAPs."
- Improve **VISITOR SATISFACTION** rating for "Unique experiences."
- Increase **VISITOR SPENDING AND VISITOR ARRIVALS IN SHOULDER SEASONS** to generate activity without straining capacity.

STRATEGIC PILLAR 2

STRATEGIES AND TACTICS

1. Establish an HTA experience development program.

- Create an experience development program to build on existing community-based programs, lead product development initiatives, and stimulate regenerative tourism strategies.
- Design and align tourism product development initiatives with community priorities, ensuring they are regenerative and sustainable to deliver positive impacts for both communities and the environment.
- Continue to work with Native Hawaiian organizations and practitioners to lead product design, protocols, and storytelling so tourism directly strengthens cultural practice and language.
- Support initiatives and educational programs recognizing Hawai‘i’s cultural diversity and celebrating contemporary expressions of aloha.
- Coordinate internal efforts to bridge the gap between community-aligned experiences and market readiness, prioritizing experiences that attract high-value travelers.

2. Support the enhancement of major attractions and experiences to improve Hawai‘i’s competitiveness for high-value visitors and major events.

- Strengthen HTA’s sports committee to actively pursue and develop significant sports events that generate community benefits and high-value visitation, particularly during shoulder seasons.
- Support feasibility studies to guide sustainable improvement or development of high-potential, “on-brand” experiences.
- Develop branded experiences or “trails” to create, highlight, and drive visitation to signature offerings, such as Hawai‘i Island’s Kona coffee region.
- Prioritize funding of festivals and events that fill shoulder seasons and generate economic impact for local communities, foster positive relationships between visitors and residents, and advance Hawaiian culture.
- Develop film and TV-based visitor experiences to leverage Hawai‘i’s iconic on-screen locations.

3. Strengthen Hawai‘i Convention Center’s role as an economic and cultural hub for visitors and residents.

- Support efforts to complete repair and maintenance projects on time and on budget based on the HCC’s 6-year Capital Improvement Projects plan.
- Continue to use HCC for community events, cultural festivals, and local business expos during off-peak convention periods.
- Develop local business integration programs and encourage local sourcing for catering, décor, and event services.
- Partner with the University of Hawai‘i School of Travel Industry Management and the University of Hawai‘i system, other universities in Hawai‘i, and training programs to provide internships and event staffing opportunities.

4. Strengthen pathways for local entrepreneurs, creators, and producers to join the tourism economy.

- Foster multi-purpose hubs connecting travelers with authentic local experiences and products, artists, outfitters, cultural information, and potentially transit options.
- Foster an agritourism initiative to connect more producers and products with the tourism economy.
- Integrate and expand programs that equip small businesses to engage more effectively with visitors.
- Support local entrepreneurship by connecting tourism operators with local producers, arts and culture, and service providers, potentially through a statewide directory, and amplifying the “Hawai‘i Made” brand.

5. Advance understanding and preservation of Hawaiian culture.

- Encourage use of Native Hawaiian voices and language to share cultural values and traditions in signage, digital tools, and other touchpoints throughout the visitor journey.
- Partner with hotels, attractions, transit systems, and airlines to share accurate and meaningful representations of Hawaiian culture and aloha.
- Collaborate with Hawaiian cultural organizations to identify practices for sharing cultural sites with visitors.
- Require authentic portrayals of Hawaiian culture for all HTA-funded activities supporting Hawaiian culture, including communications, events, and sponsorships.
- Field a study to explore perceptions of aloha among prospective and past visitors and residents to address concerns that visitors may feel unwelcome and identify ways to promote positive interactions among visitors and residents.

6. Implement a proactive, data-driven destination management approach that balances visitor distribution, safeguards cultural and natural resources, and prioritizes community well-being.

- Develop and implement destination management action plans that prevent overcrowding and congestion, protect cultural and natural resources assets, ensure exceptional experiences for both visitors and residents, and enhance the quality of life for residents.
- Engage communities on every island in the development and implementation of the destination management action plans and build awareness around the planning, execution, and iteration processes.

7. Continue supporting Hawaiʻi's sustainability goals.

- Identify ways to enable and equip visitors and tourism-related businesses to embrace sustainable actions.
- Develop a toolkit for local businesses and attractions on how to operationalize regenerative and sustainable practices and communicate them effectively to visitors.
- Align HTA messaging and programs with the state's Aloha+ Challenge.

Hawaii Tourism Authority (HTA) / Ben Ono

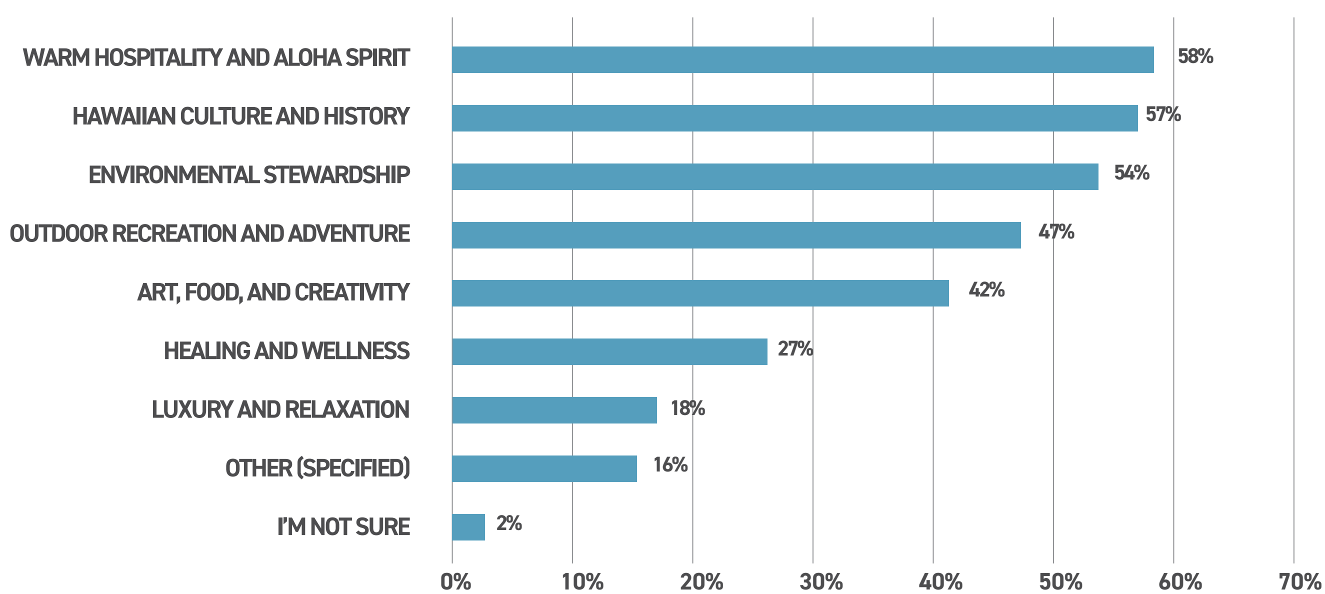
STRATEGIC PILLAR 2

EXPERIENCE DEVELOPMENT

ADDITIONAL MEASURES OF SUCCESS

- **Sports events**: Out-of-State visitation for sports events rises between 2025 and 2030.
- **Trails:** Four new cultural/product-based trails are branded and marketed by 2030.
- **Business development:** Number of tourism-related small- and medium-size enterprises increases from 2025 to 2030.
- **Experience of Aloha:** MMGY Portrait of American Traveler study shows a drop in the percentage of visitors agreeing that "I have heard/read that Hawai'i residents are opposed to visitors coming."
- **DMAP milestones:** Delivered on time and on budget.
- **Adoption of HTA sustainability tools and initiatives:** Monitor participation in HTA-funded sustainability programs to assess value and guide refinements.
- **Awareness of HTA activities:** Awareness of Hawai'i's destination management activities rises. Source: Resident Sentiment Survey.
- **Quality of life:** Agreement that "tourism is an industry that enhances residents' quality of life" rises. Source: Resident Sentiment Survey.

WHAT DO YOU WANT YOUR HAWAI'I COMMUNITY TO BE KNOWN FOR?

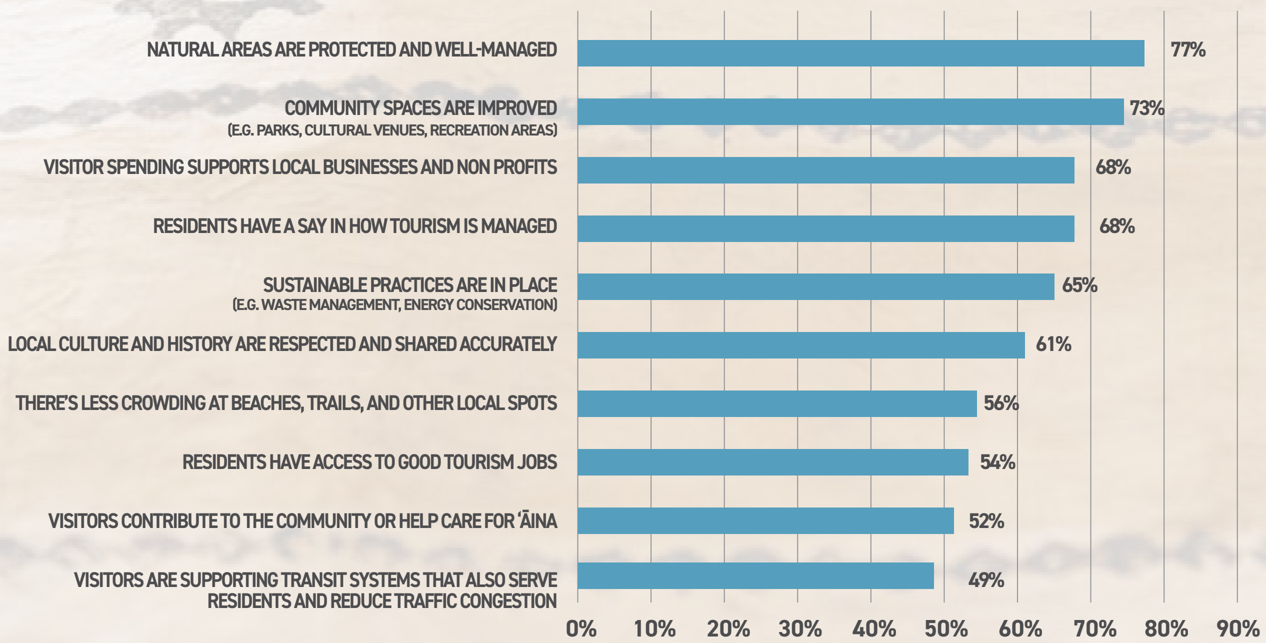


Residents especially see promise in advancing Hawai'i's reputation for hospitality, Hawaiian culture, and environmental stewardship. Many also support outdoor recreation and arts, food and creativity.

Source: PPRC/HTA Community Survey, Aug 2025

Hawaii Tourism Authority (HTA) / John Hook

TOURISM IS BENEFITING THE COMMUNITY WHEN...



Source: PPRC/HTA Community Survey, Aug 2025

STRATEGIC PILLAR 3

TOURISM LEADERSHIP

HTA is responsible for collaborating with public, private, and community stakeholders to manage visitation and foster a regenerative, resilient tourism economy.

ʻAʻohe puʻu kiʻekiʻe ke hoʻaʻo ia e piʻi.

“No cliff is so tall it cannot be climbed.”

These words speak to perseverance and the ability to overcome challenges through effort. The manu (winged creatures) of Hawaiʻi show us how to soar above even the highest cliff. Hawaiian culture honors birds as “story keepers,” and their plumage has been recognized traditionally as symbols of leadership.

Hawaii Tourism Authority (HTA) / Vincent Lim

OBJECTIVE

Lead tourism in partnership with the Legislature, state, county, industry, and community partners to deliver more "net positive" outcomes and build the visitor economy's strength and resilience. Communicate clearly and collaboratively so that everyone understands their stake in tourism.

WHY?

Hawai'i's tourism economy faces several interconnected challenges, including overcrowding, workforce shortages, housing pressures, environmental impacts, aging infrastructure, and vulnerability to crises. No single agency or sector can resolve these issues on its own. The future of Hawai'i tourism relies on strong public trust, collaborative governance, and a shared commitment to delivering meaningful benefits for communities, the environment, and the economy. Establishing formal partnerships, defining clear responsibilities, ensuring shared accountability, and promoting transparency are essential steps to finding solutions, leveraging resources, restoring trust, and building resilience for Hawai'i's economy and communities in the face of future crises.

KEY PERFORMANCE INDICATORS

- Improve **RESIDENT SENTIMENT** by rising agreement with "Tourism has brought more benefits than problems."
- Increase **PARTNER SATISFACTION** with HTA collaborations as reported by partners in a new annual partner survey from 2026 to 2030.
- HTA secures **INCREASED FUNDING** for initiatives in this plan.

STRATEGIC PILLAR 3

STRATEGIES AND TACTICS

1. Clarify and strengthen HTA's role as leader of Hawaiʻi tourism.

- Enhance HTA's operational efficiency and accountability by conducting a full organizational assessment, aligning staffing and resources with the new strategy, improving procurement processes, and establishing clear performance measures that support a high-functioning, positive organizational culture.
- Increase opportunities to engage the visitor industry, state and county governments, nonprofits, and community expertise in HTA planning and program development.
- Strengthen ties with other sectors to build understanding of tourism's value and shared benefits.
- Lead the industry in use of advanced technologies, including artificial intelligence, to strengthen tourism marketing, communications, planning, and evaluation functions and improve overall operational efficiency.
- Launch a "Partners in Stewardship" program to recognize successful cross-agency or cross-sector collaborations, potentially at the annual Tourism Conference.

2. Formalize interagency partnerships.

- Update the Tourism Functional Plan to support long-term planning to maintain and improve key visitor infrastructure (including airports and public lands) in line with local priorities and visitor industry needs.
- Establish Memoranda of Understanding with state and county agencies, beginning in fiscal year 2027, to define roles, responsibilities, and desired outcomes for tourism-related initiatives involving HTA, including DMAPs.
- Facilitate a standing interagency/island tourism roundtable to foster cross-learning, set a shared action agenda, and assess progress on shared initiatives.

3. Strengthen island-based collaboration.

- Launch a statewide Visitor Management Dashboard during fiscal year 2027 to track island-based DMAP outcomes and visitor insights from the statewide app and HTA's website.
- Develop opportunities for industry and community engagement at least twice a year on each island to inform planning and strengthen local partnerships.

4. Communicate collaboratively and proactively.

- Establish a periodic media briefing to present forward-looking tourism plans and report on visitor economy performance, especially to identify positive impacts of visitor spending and progress with the "Value Over Volume" marketing strategy.
- Engage with residents in periodic community forums to share initiatives, report outcomes, gather input, and publish follow-up actions in a timely manner.
- Reimagine the annual report to include tourism outcomes and evidence-based benefits of tourism.
- Develop a statewide public information campaign to raise awareness of the benefits of tourism and the need to market Hawaiʻi responsibly to sustain a visitor economy that can support community well-being.
- Advocate for transparency around allocation of tourism-generated tax revenues and work with DBEDT to demonstrate the true contribution of the visitor economy to state and county budgets.
- Create visitor-facing communications that acknowledge their role in mutually beneficial tourism, describing how their spending creates benefits, such as "Green Fee"-funded improvements.

STRATEGIES AND TACTICS

5. Support workforce development.

- Update and implement HTA's Tourism Workforce Development Plan with a focus on making Hawai'i a center of excellence for tourism training and education, both for students in Hawai'i and from around the world.
- Expand collaborations with the University of Hawai'i's School of Travel Industry Management and the UH system's tourism and culinary programs.
- Explore developing an initiative to address employers' top challenge: recruitment and training of managers.

6. Build the long-term resilience of the tourism economy.

- Create an air route sustainability and development plan to protect load factors on current routes, sustain and build seat inventory from inbound markets, and identify opportunities to attract routes from high-potential markets.
- Support contingency planning and crisis protocols for natural hazards, terrorism, infectious disease, and other events that could impact tourism.
- Develop education, prevention, and preparedness programs for visitor safety, such as a toolkit equipping vacation rental operators to alert guests to emergency plans.
- Leverage HTA's authority for policy development and technical assistance to support research and policies that address major social issues impacting tourism.
- Collaborate with partners to prioritize tourism promotion and activities in designated, highly managed areas to reduce impacts of visitation and protect the character of special places.
- Support compliance and responsible operation of legal short-term vacation rentals.

WHY MARKETING MATTERS

While many in Hawai'i seem to believe that "Hawai'i markets itself," HTA's independent campaign effectiveness research shows bigger marketing budgets yield bigger economic returns — and that visitors who recall seeing HTA marketing far outspend those who don't.

SMARInsights' analysis shows HTA's 2024 U.S. campaign yielded an extremely high return on investment (ROI) — $406 in visitor spending and $36 in taxes for every $1 spent on media. HTA's ROI was 85% higher than the average $219 ROI tracked for state tourism offices with media spends of $5 million or more.

The April 2025 report also shows HTA's 2024 media budget of $5.288 million generated nearly $2.15 billion in spending and about $190.8 million in state and county TAT and GET — just from the U.S. travelers who recalled seeing parts of the 2024 campaign.

The study also showed that these "ad-aware" U.S. travelers spent an average of $6,264 per trip, or $308 per person per day. That was 26% more than the daily average of $244 reported by DBEDT for a U.S. visitor in 2024. "Ad-aware" consumers also were far more likely to say they wanted to visit Hawai'i (43%) than those who were unaware (23%).

SMARInsights noted that 2024 results fell short of 2023, mainly because the U.S. media budget was cut from $8.32 million in 2023 to $5.288 million in 2024. Although the state saved $3.0 million, "ad-aware" visitor spending fell by $1.237 billion in 2024.

STRATEGIC PILLAR 3

TOURISM LEADERSHIP

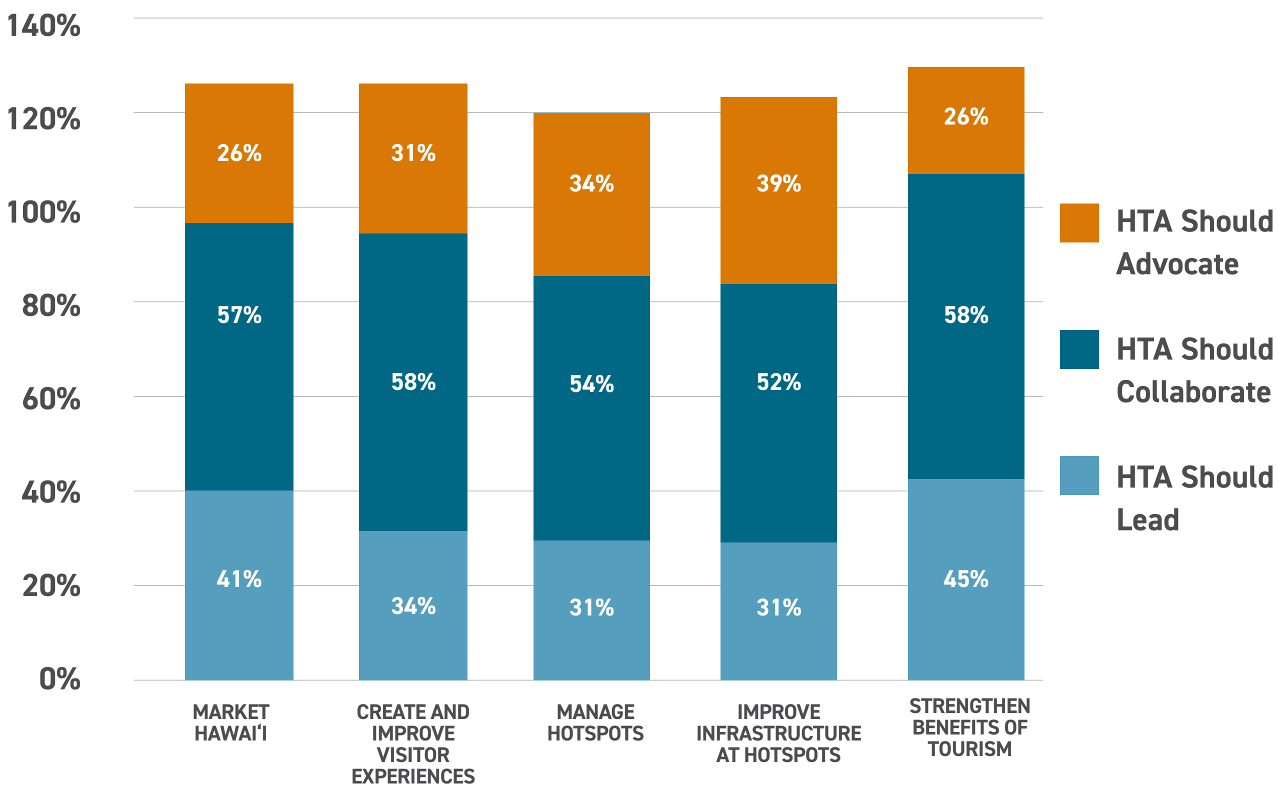
ADDITIONAL MEASURES OF SUCCESS

Monitoring these additional indicators will provide further insights into outcomes of the strategies and tactics above. Results will be shared annually in the Strategic Tourism Management Plan.

- **Visitor Satisfaction:** Visitors from MMAs rate their experience as "excellent."
- **Dashboard/App Insights:** Reduced pressure and improved management of sensitive or high-use sites.
- **Partner satisfaction:** Satisfaction rate of DMAP advisory board members and other identified partners is monitored.
- **Stronger community and industry engagement:** Identification of decisions and actionable insights resulting from industry and community participation in DMAP Advisory Groups, committees, and forums.

WHAT SHOULD BE HTA'S ROLE?

Percentages sum to more than 100% because respondents could select multiple options.



Tourism industry members believe HTA's primary role is to collaborate.

Source: PPRC/HTA Industry Survey, Aug 2025

STATUTORY FRAMEWORK FOR EACH STRATEGIC PILLAR

STRATEGIC PILLAR 1: BRAND MARKETING

HRS §201B-7(a)(1)/ 7(b)(3): Requires the HTA to promote, market, and develop Hawaiʻi's tourism industry, with the authority to engage contractors.

HRS §201B-7(a)(2)/ 7(b)(4): Allows and requires HTA to engage contractors for market-development research.

HRS §201B-6: Requires HTA to create an annual Strategic Tourism Management Plan that advances tourism marketing, complies with destination management best practices, and promotes regenerative tourism. The plan also must include measures of effectiveness.

HRS §201B-3(a)(16): Allows HTA to advise the private sector in developing tourism-related activities and resources.

STRATEGIC PILLAR 2: EXPERIENCE DEVELOPMENT

HRS §201B-1: Includes "improve visitor experiences" and "ensure that the provision of services enhances the visitor experience" among HTA's destination management responsibilities.

HRS §201B-1: Defines regenerative tourism as a practice designed and managed to bring "net positive contributions" to local communities and that implements innovative and sustainable economic development plans.

HRS §201B-6: Requires HTA to create an annual Strategic Tourism Management Plan that advances tourism marketing, complies with destination management best practices, and promotes regenerative tourism. The plan also must include measures of effectiveness.

HRS §201B-3(19), §201B-7(a)(3): Allows HTA to coordinate with counties and others in the public and private sectors to create new experiential products and engage in product development.

HRS §201B-7(a)(4), 201B-3(18): Allows HTA to promote, develop, or coordinate festivals, community and cultural events, as well as sports-related or environmental stewardship activities.

201B-3(a)(28): Allows HTA to "focus on perpetuating the uniqueness of Hawaiian culture and communities and their significance to the quality of the visitor experience."

STRATEGIC PILLAR 3: TOURISM LEADERSHIP

HRS §201B-1: Defines destination management as a collaborative and coordinated process with public, private, and community stakeholders to manage the various elements of a visitor destination.

HRS §201B-1: Defines regenerative tourism as a practice designed and managed to bring "net positive contributions" to local communities and implements innovative and sustainable economic development plans.

HRS §201B-7(b)(1), §201B-6.2: Mandates development of a long-term statewide tourism strategic plan and a regularly updated tourism functional plan describing economic, community, and sustainability goals.

HRS §201B-7(b)(2), §201B-6.4: Requires HTA to develop and implement DMAPs for four counties.

HRS §201B-3(a)(20): Allows HTA to establish a public information and educational program to increase understanding of tourism and tourism-related problems.

IMPLEMENTATION TIMELINE

STRATEGIC PILLAR 1: BRAND MARKETING

NOTE: This timeline is effective June 1, 2026, and indicates when strategic tactics are expected to begin. Timeline may be revised due to budget, statutory changes, or other conditions.

	FY26	FY27	FY28	FY29	FY30	FY31	ONGOING
1. Identify and focus marketing outreach to include more higher-spending, high-value traveler segments.	STRATEGIC PLANNING						
· Conduct a brand/market segmentation study to validate and identify high-value market segments.			◆				
· Develop personas for each segment so everyone can understand who HTA is targeting.			◆				
· Refine ongoing targeted market segments.				◆			
· Initiate marketing co-ops to sustain and build air service in key international and domestic markets.							◆
· Place more emphasis on the higher-spending U.S. East market to stimulate increased average daily visitor spending.			◆				◆
· Inspire visitors to experience more events and attractions to drive additional visitor spending.							◆
· Moderate visitor flows in peak travel seasons and stimulate visitation during slower periods.							◆
· Drive efficiencies in market segmentation through a digital-first strategy.			◆				
· Provide Hawaiʻi-based visitor industry partners with opportunities to share targeted advertising on owned HTA channels.			◆				
2. Energize the Hawaiʻi brand.	STRATEGIC PLANNING						
· Use the brand and market segmentation study to carve out a distinctive Hawaiʻi brand position.				◆			
· Relaunch GoHawaii.com with modern tools and technology.				◆			
· Collaborate with DBEDT's Creative Industries division to further differentiate the Hawaiʻi brand.							◆
· Strategically promote film and TV locations through integrated storytelling and partnerships to inspire visitation.							◆
3. Strengthen Hawaiʻi's global competitiveness for meetings, conventions, and incentives (MCI) travel.							
· Lead an industry task force to create a long-term plan to build Hawaiʻi's competitive position for MCI travelers.		◆					
· Highlight Hawaiʻi's unique cultural identity to differentiate the brand.							◆
· Determine an appropriate level of citywide conference incentives.		◆					
· Focus MCI sales strategy on Hawaiʻi's core competencies and DBEDT's key economic clusters.		◆					
· Increase recruitment of incentive trips and meetings during the convention center renovation.		◆					
4. Identify optimal distribution of visitation and high-value traveler segments for each island.	STRATEGIC PLANNING						
· Collaborate with island communities to prioritize attributes for promotion and reflect local priorities.			◆				◆
· Leverage visitor experiences and tours to stimulate interisland visitation and responsible travel.				◆			
5. Educate and engage all visitors to travel responsibly throughout Hawaiʻi.							
· Integrate pre- and post-arrival messaging efforts into a single branded campaign.		◆					
· Partner with hotels, attractions, and airlines to educate visitors.							◆
· Collaborate with DLNR and other stakeholders to identify top messaging priorities for visitors.							◆
· Explore the use of artificial intelligence to identify and correct misinformation on social media.			◆				

NOTE: Wording of strategies and tactics may be condensed. See Pages 26-39 for full versions.

IMPLEMENTATION TIMELINE

STRATEGIC PILLAR 2: EXPERIENCE DEVELOPMENT

NOTE: This timeline is effective June 1, 2026, and indicates when strategic tactics are expected to begin. Timeline may be revised due to budget, statutory changes, or other conditions.

	FY26	FY27	FY28	FY29	FY30	FY31	ONGOING
1. Establish an HTA experience development program.	STRATEGIC PLANNING						
· Create an experience development program.			◆				
· Design and align tourism product development initiatives with community priorities.			◆				
· Continue to work with Native Hawaiian experts so tourism directly strengthens cultural practice.							◆
· Support initiatives recognizing Hawaiʻi's cultural diversity and celebrating contemporary expressions of aloha.							◆
· Steer experience development toward market readiness, especially to attract high-value travelers.			◆				
2. Support enhancement of major attractions and experiences to improve Hawaiʻi's competitiveness.							
· Strengthen HTA's sports committee to actively pursue and develop significant sports events.		◆					
· Support feasibility studies to improve or develop high-potential, "on-brand" experiences.				◆			◆
· Develop branded experiences or "trails" to highlight and drive visitation to signature offerings.		◆					
· Prioritize funding of festivals and events that fulfill Experience Development objectives.							◆
· Develop film and TV-based visitor experiences to leverage Hawaiʻi's iconic on-screen locations.		◆					
3. Strengthen Hawaiʻi Convention Center's role as an economic and cultural hub for visitors and residents.	STRATEGIC PLANNING						
· Support efforts to complete repair and maintenance projects on time and on budget.							◆
· Continue to use HCC for community events, cultural festivals, and local business expos during off-peak periods.							◆
· Develop local business integration programs and encourage local sourcing for catering, décor, and event services.							◆
· Partner with Hawaiʻi universities and training programs to provide internships and event staffing opportunities.							◆
4. Strengthen pathways for local entrepreneurs, creators, and producers to join the tourism economy.							
· Foster multi-purpose hubs connecting travelers with authentic local experiences.				◆			
· Foster an agritourism initiative to connect more producers and products with the tourism economy.		◆					
· Expand programs equipping small businesses to engage more effectively with visitors.			◆				
· Support local entrepreneurship by connecting tourism operators with local producers and makers.							◆
5. Advance understanding and preservation of Hawaiian culture.	STRATEGIC PLANNING						
· Encourage use of Native Hawaiian voices and language to share cultural values and traditions.							◆
· Partner with industry operators to share meaningful representations of Hawaiian culture.							◆
· Collaborate with Hawaiian cultural organizations to identify best practices for visitor interactions.							◆
· Require authentic portrayals of Hawaiian culture for all HTA-funded activities.							◆
· Explore perceptions of aloha to address concerns that visitors may feel unwelcome.		◆					
6. Implement a proactive, data-driven destination management approach.							
· Develop and implement destination management action plans (DMAPs).						◆	◆
· Engage all island communities in developing and implementing DMAPs.							◆
7. Continue supporting Hawaiʻi's sustainability goals.							
· Identify ways to equip visitors and tourism-related businesses to embrace sustainable actions.							◆
· Develop a toolkit for local businesses to operationalize regenerative and sustainable practices.				◆			
· Align HTA messaging and programs with the state's Aloha+ Challenge.							◆

NOTE: Wording of strategies and tactics may be condensed. See Pages 26-39 for full versions.

IMPLEMENTATION TIMELINE

STRATEGIC PILLAR 3: TOURISM LEADERSHIP

NOTE: This timeline is effective June 1, 2026, and indicates when strategic tactics are expected to begin. Timeline may be revised due to budget, statutory changes, or other conditions.

	FY26	FY27	FY28	FY29	FY30	FY31	ONGOING
1. Clarify and strengthen HTA's role as leader of Hawai'i tourism.	STRATEGIC PLANNING						
· Enhance HTA's operational efficiency by conducting a full organizational assessment.		◆					
· Increase opportunities to engage visitor industry, government, nonprofit, and community expertise.							◆
· Strengthen ties with other sectors to build understanding of tourism's value and shared benefits.							◆
· Lead the industry in use of advanced technologies to strengthen tourism marketing and improve operational efficiency.							◆
· Launch a "Partners in Stewardship" program to recognize successful cross-sector collaborations.			◆				
2. Formalize interagency partnerships.							
· Update the Tourism Functional Plan to support long-term planning and improve key visitor infrastructure.		◆					
· Establish MOUs with state and county agencies to define roles, responsibilities, and desired outcomes.		◆					
· Facilitate a standing interagency/island tourism roundtable to foster cross-learning and set a shared action agenda.		◆					
3. Strengthen island-based collaboration.	STRATEGIC PLANNING						
· Launch a statewide Visitor Management Dashboard to track island-based DMAP outcomes and visitor insights.		◆					
· Develop opportunities for industry and community engagement on each island to strengthen local partnerships.		◆					
4. Communicate collaboratively and proactively.							
· Establish a periodic media briefing to present forward-looking tourism plans and report on visitor economy performance.		◆					
· Engage with residents in periodic community forums to share initiatives, report outcomes, gather input. Publish follow-up actions.							◆
· Reimagine the annual report to focus on tourism outcomes and evidence-based benefits of tourism.		◆					
· Develop a statewide public information campaign to raise awareness of the need to market Hawai'i responsibly.		◆					
· Advocate for transparency around allocation of tourism-generated tax revenues.							◆
· Create visitor-facing communications that acknowledge their role in mutually beneficial tourism.			◆				
5. Support workforce development.	STRATEGIC PLANNING						
· Update HTA's Tourism Workforce Development Plan to make Hawai'i a premier global educational center for tourism.		◆					
· Expand collaborations with the University of Hawai'i's tourism and culinary programs.							◆
· Explore developing an initiative to address employers' top challenge: recruitment and training of managers.			◆				
6. Build the long-term resilience of the tourism economy.							
· Create an air route development plan to sustain and build current routes and seats and identify expansion opportunities.			◆				
· Support crisis planning for natural hazards, terrorism, infectious disease, and other events that could impact tourism.							◆
· Develop education, prevention, and preparedness programs for visitor safety.		◆					
· Leverage HTA's authority for policy development to help address major social issues impacting tourism.							◆
· Collaborate with partners to prioritize tourism promotion and activities in designated, highly managed areas.							◆
· Support compliance and responsible operation of legal short-term vacation rentals.							◆

NOTE: Wording of strategies and tactics may be condensed. See Pages 26-39 for full versions.

Hawaii Tourism Authority (HTA) / Heather Goodman

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