2026 Spring Tourism Update Q&A Compiled Questions

Trends:

1. Are there any insights regarding why KOA dropped so much?

   According to our daily passenger counts, passenger arrivals were mostly up from 2024 in November and December except in the last week of the year for KOA. This suggests that the decrease in TSA volume for November was due to a lower volume of interisland travelers since the Mainland traffic was up. During the summer and through fall of 2025, Mainland volume was similar but slightly lower than 2024. For more information on daily passenger counts, visit https://dbedt.hawaii.gov/economic/daily-passenger-counts/.

2. Have there been any studies/data collection on reasoning for continued low TVR numbers? $ or just a different type of traveler with specific hotel type needs?

   No studies or data collection have been conducted.

3. Why the large variance between this year and last for Alaska. Is Hawaiians numbers not included for last year?

   Hawaiian was reported separately last year. Changes were also made to schedules.

4. Is there an analysis of where increased visitor spending is going within the spend categories of hotel, activities, restaurant dining, retail shopping, etc…

   For more information on how visitor spending is broken down by category please visit our Monthly Visitor Statistics (https://www.hawaiitourismauthority.org/research/monthly-visitor-statistics/) and Annual Visitor Research Reports (https://www.hawaiitourismauthority.org/research/annual-visitor-research-reports/).

5. Are you prepared to intentionally reduce total arrivals if it results in higher per-visitor revenue and lower community impact?

   One of our proposed KPIs for Brand Marketing is Annual growth rate of Visitor Spending outpaces growth rate of Visitor Arrivals. We also monitor Average Visitor Daily Spending and Resident Sentiment to guide our work.

6. How is the HTA formally defining a high-value visitor—is it daily spend, total trip value, or net economic impact to local communities? Is there concern that the "high value" visitor marketing will alienate middle class travelers? It's starting to feel like the focus is only on $$$ vs placing value on informed and active visitors.

   In our proposed strategic plan 2026-2030, the definition of a high-value traveler is: "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." Our definition is multi-dimensional, not just daily spend or total trip value.

<u>USA:</u>

1. How do these 110 million impressions translate into actual visitor arrivals and total visitor spending for Hawaiʻi?

   Media impressions do not translate linearly into visitor arrivals and spending, but return on advertising spend provides a meaningful measure of impact. The most recent HTA-measured U.S. Leisure campaign delivered a return of $406 in visitor spending for every $1 invested in paid media. Results for 2026 are not yet available, but this benchmark reflects the proven efficiency of Hawaiʻi's destination marketing efforts in converting awareness into economic activity. [Source: March 2025 SMARInsights Campaign Effectiveness Study]

2. What percentage of these travel advisors specialize in or actively sell to high-value traveler segments versus mass-market travel?

   HTUSA has preferred relationships with Signature Travel Network, Travel Leaders Network, and Virtuoso providing access to approximately 85,000 advisors. While exact percentages vary, all three consortia skew strongly toward high-value travelers, with a majority of advisors focused on premium, luxury, and experiential travel.

   Virtuoso is exclusively luxury-focused, serving affluent and high-net-worth clients. The network represents more than $35 billion in annual luxury travel sales and is widely regarded as the industry's leading voice in high-end travel.

Signature Travel Network primarily caters to upscale and luxury segments with many advisors focused on premium and luxury segments, including custom FIT and experiential travel.

Travel Leaders Network, while broader, includes a significant base of advisors specializing in premium and luxury travel. Global Travel Collection, a member of TLN is the world's largest collection of 1,500 luxury travel agencies and advisors serving affluent leisure, corporate, and entertainment clients

Across these networks, it's widely estimated that 60–80%+ of advisors regularly sell to high-value traveler segments, with a growing shift away from mass-market bookings toward more customized, higher-value experiences. In addition, HTUSA attends events exclusively for luxury advisors including Travel Leaders Luxury Symposium, Global Travel Marketplace Luxury, International Luxury Travel Marketplace, and ULTRA Summit.

3. What is the conversion rate from these campaigns; specifically from impression to booking; and how is that being tracked?

   This is measured in several ways including:

   - *Paid media campaigns drive targeted consumers to a destination landing page where they're exposed to qualifying offers available for direct booking. Participating partners measure actualized booking conversions.*
   - *Further, year over year occupancy reports are analyzed by term, by island, and by region for corresponding and substantiated impact in occupancy lift.*

Global MCI:

1. What financial or structural incentives are being offered to compete with destinations that are aggressively subsidizing conventions and attendance?
   - *2028–2029 Citywide Promotion:*
     A focused initiative offering enhanced incentives to secure future citywide conventions aligned with Hawai'i Convention Center availability.
   - *Single Property Incentive (Launched February):*
     A targeted program designed to help close business that has relocated from destinations in crisis, supporting final conversion decisions.
   - *In-State Spend Requirement:*
     All incentives—across both citywide and single property—are required to be

spent within the State of Hawaiʻi, ensuring direct economic benefit to the destination.

- *Clarification:*
  Hawaiʻi's MCI incentive approach is structured around targeted, conversion-based programs. Direct subsidization of attendee costs is not a component of current incentive programs.

2. How are campaigns like the Maui Incentive Campaign translating into confirmed bookings, room nights, and total visitor spending; particularly for Maui's recovery?
   - *Campaign Results to Date (Direct Booking Program):*
     - *Total Incentives Awarded: $29,500*
     - *Total Room Nights Generated: 12,572*
     - *Total Economic Impact: $15.8 million*
   - *Campaign Performance:*
     - *Incentive Sales Program: 4,107 room nights | $4.3M economic impact*
     - *IMEX Activation: 8,465 room nights | $11.5M economic impact*
   - *In-State Spend Requirement:*
     All incentives are required to be spent within the State of Hawaiʻi, ensuring direct economic benefit to Maui.
   - *Ongoing Campaign Activity:*
     A third campaign (Maui Incentive Marketing Program), focused on lead generation through SITE Global and Meet Hawaiʻi channels, is currently in market and running through May 31. Final results are not yet available.
   - *Measurement:*
     Results are based on confirmed bookings (executed contracts), with room nights and economic impact tracked through standard reporting.

3. How is Hawaiʻi addressing the widening gap between its premium pricing and planners' increasing focus on cost and value?
   Hawaiʻi recognizes that pricing is a consideration in today's environment, particularly as planners place increased focus on overall value.

   Our Meet Hawaiʻi team works closely with each client to understand their goals, budget parameters, and program needs. Based on that, we guide them toward options across the islands that best align, whether through venue selection, timing, or overall program design.

When Hawaiʻi comes in at a higher price point, we focus on clearly articulating the value the destination delivers. This includes strong attendee demand, higher attendance performance, longer stays, and a unique, memorable experience that supports overall program success and ROI.

Safety is also a key differentiator. Hawaiʻi is widely viewed as a safe, stable, and trusted destination, particularly when compared to some international markets, providing added confidence for both planners and attendees.

Every program is different, and this tailored, consultative approach is often what moves business forward.

In select cases, we are able to offer targeted incentives to help close business. These funds are applied directly to the in-destination program—supporting attendee experience and on-island services, ensuring the investment stays within Hawaiʻi while adding value for the client.

Hawaiʻi may not always be the lowest-cost option, but we remain highly competitive when measured on total program value and long-term impact.

4. If other cities are winning on infrastructure, how is Hawaiʻi quantifying and packaging its experiential advantages to justify higher costs?

This is a shared focus across HVCB, HCC, and HTA.

While infrastructure, such as convention facilities, hotel inventory, and accessibility is an important consideration and often drives initial interest, our role is to ensure Hawaiʻi's experiential advantages are clearly defined, supported by data, and integrated into the sales process.

We quantify value through performance. Hawaiʻi consistently delivers strong attendance, longer stays, and high levels of engagement outcomes that directly support program success and overall ROI for the client.

We also package the destination experience more intentionally, integrating cultural engagement, unique off-site venues, and legacy opportunities that align with organizational goals and create a more meaningful program.

We focus on delivering a high-quality, well-executed experience that drives strong attendance, engagement, and overall program success, ensuring clients see value in the outcomes, not just the cost.

Safety is also a key differentiator. Hawaiʻi is widely viewed as a safe, stable, and trusted destination, particularly when compared to some international markets…providing added confidence for both planners and attendees.

Ultimately, while infrastructure may drive initial consideration, it is the combination of performance, experience, and long-term impact that positions Hawaiʻi competitively in the global market.

Convention Center:

1. Why is the construction funding in jeopardy?
   The funding for the rooftop repair project is not in jeopardy. The funds for this project are already secure. Currently, the legislature is considering our request to spend the $21 million in the Hawaiʻi Convention Center Special fund to fix leaks in the transom glass, which is adjacent to the convention center roof being repaired.

2. Given the scale of expansion across US America convention centers, how is Hawaiʻi positioning itself to compete if it cannot match these destinations on size, cost, or infrastructure?

   The repairs we are conducting are primarily to address leaks - something expected in any convention center. These efforts are necessary, but they bring the building back to baseline. What will truly reposition us in the market are the other things that add value to our convention center and keep us competitive, like digital signage and technology upgrades. The canopy is major opportunity for our 28-year-old building, especially since there have been no large-scale improvements in that area.

   Modernizing our escalators is essential so that they don't stop in the middle of a conference. We intend to seek funding for some of the other upgrades and leaks in our building to better position us.

   Ultimately, this is about enhancing the experience for the attendees in our building through technology and additional flex space so meeting planners can utilize every component of our building, and consistent, high-quality service.

   When they're in the Hawaiʻi Convention Center, they know they are in Hawaiʻi. Our building is beautiful; it brings the outdoors indoors. What sets us aside is the service we provide. That comes through our surveys, customer feedback and client testimony. That's what will reposition us in our market to be a world-class facility *where East meets West.*

Europe:

1. Of the ‘Ethical Explorers’ and ‘Wellness Seekers’ targeted, how many align with Hawaiʻi’s high-value visitor strategy; travelers likely to spend more per trip and engage with premium experiences?

   Our Ethical Explorers and Wellness Seekers segments are intentionally designed to align with Hawaiʻi’s high-value visitor strategy. These audiences are identified using a combination of travel intent signals, premium lifestyle behaviors, and long-haul travel interest—ensuring we reach travelers who are both willing and able to invest in meaningful, high-quality experiences.

   By leveraging a mix of first-, second-, and third-party data, we focus on affluent, experience-driven travelers who are more likely to spend more per trip and engage with Hawaiʻi’s unique, premium offerings. In key markets like Europe, this approach is further refined to prioritize travelers with the mindset, intent, and financial capacity to realistically consider a long-haul destination like Hawaiʻi.

2. How are you measuring whether these emotion-led campaigns in the UK and Germany are converting engagement into actual bookings to Hawaiʻi?

   We partner with travel trade companies on each campaign and set measurable targets such as visitor numbers, length of stay, and booking value. After the campaign, partners report on these metrics, allowing us to directly assess performance and confirm conversion into bookings.

3. Europeans are taking fewer trips but longer stays; how is HTE tailoring offers, packages, and messaging to capture these long-stay, high-spend visitors?
   We work with trade partners to package itineraries that showcase multiple islands and provide training to help them sell these experiences effectively. Our campaigns target culturally curious travelers seeking immersive, meaningful experiences, aligning with European preferences for fewer but longer trips. This approach supports higher on-island spending, responsible tourism, and sustainable growth.

4. How is HTE measuring whether these PR efforts are strengthening Hawaiʻi’s positioning as a premium, culturally grounded destination over time?

PR plays a key role at the top of the travel decision journey, building awareness and inspiring future bookings. We measure success through a combination of media quality, audience reach, and downstream impact. This includes coverage in top-tier publications, advertising value equivalency (AVE), audience engagement, and partnerships with trade that provide trackable calls to action. We also monitor destination rankings in reader surveys and industry awards, as well as engagement metrics from influencers. Together, these indicators help us assess how effectively PR is strengthening Hawaiʻi's positioning as a premium, culturally rich destination over time.

5. How is HTE using its campaigns and PR to encourage visitation beyond Maui and Oahu to smaller islands where cultural experiences are more immersive?

   Hawaiʻi Tourism Europe (HTE) promotes Hawaiʻi through targeted media visits and storytelling. Within the past year, we've hosted 14 journalists across all major islands, often combining multiple islands in a single itinerary to highlight ease of travel and the unique character of each destination. Our approach emphasizes cultural experiences, local communities, and responsible tourism. We also work closely with island partners to align messaging and ensure balanced exposure.

6. If digital engagement increases but visitation does not, how will you adjust your strategy?

   Strong digital engagement indicates we are reaching the right audiences at the right stage of the travel decision journey—an important first step for a long-haul destination like Hawaiʻi. We continuously optimize campaigns using data from tour operator partners, including tracking tools that measure not only engagement but also downstream actions such as searches, inquiries, and bookings where available. This allows us to adjust targeting, creative, and channel mix in real time to focus on high-value audiences most likely to convert, while also building long-term demand. Additionally, many bookings occur through partners, so not all conversions are immediately visible in direct visitation data, even though campaigns are driving demand.

7. Hawaiʻi's flag includes the Union Jack, reflecting historical ties to Britain—how is HTA leveraging this heritage in the UK and European markets to strengthen Hawaiʻi's positioning as a culturally rich, premium destination and ultimately driving tangible bookings and longer stays?

HTA is leveraging Hawaiʻi's historical ties to the UK through targeted partnerships and storytelling. For example, our collaboration with the British Museum engages a high-value, culturally curious audience through the exhibition A Kingdom Crossing Oceans, which highlights the connection between Hawaiian and British royalty. We also supported media coverage in outlets such as The Telegraph, featuring Hawaiʻi's royal history and cultural ties to the UK. These efforts position Hawaiʻi as a culturally rich, premium destination and inspire travel consideration among high-value audiences.

Canada:

1. How is HTA measuring whether Canadian travelers who are hesitant due to political sentiment are still converting into actual bookings for Hawaiʻi?

   While the Hawaiʻi Tourism Canada (HTCAN) doesn't specifically survey the sentiment of those choosing to visit or not visit Hawaiʻi, the team closely monitors the overall sentiment towards U.S. travel via our trade partners, consumer surveys, etc. Thankfully, Canadians view Hawaiʻi quite differently from the continental U.S. There is a genuine appreciation for how unique Hawaiʻi is multiple ways. For conversion, thankfully, Hawaiʻi has maintained considerably stronger results than the continental U.S. Canadians are still visiting Hawaiʻi and planning for future trips. Canada maintains its position as the #2 international market to Hawaiʻi.

2. If Canadian travelers do return, how is HTA ensuring that visitation benefits not just Maui and Oahu, but also neighbor islands and rural communities?

   HTCAN has been in place for over 8 years and has consistently followed the HTA mandate to encourage multi-island visits and to incorporate all the islands into our activities. Whether it is providing equal presentation time for all the islands in Sales Missions, coordinating webinars for Travel Agents with each island Visitor Bureau represented, or facilitating journalist visits and content creation, HTCAN aims to spread the benefits of visitation to all the islands and their rural communities. While there has been a downturn in visitation, Canada remained Hawaiʻi's second-largest international market in 2025. Canadian visitors stayed an average of 11 days and visited an average of 1.5 islands per trip, per the Monthly Visitor Statics Reports*, released by the Hawaiʻi Department of Business, Economic and Tourism.*

3. How are historical connections, like the Native Hawaiian presence in Canada during the 1800s, being incorporated into HTA's trade and consumer storytelling to differentiate Hawaiʻi as a culturally grounded destination?

HTCAN has not strategically utilized that history as a layer within its marketing and promotional efforts but has recently connected with a Pacific Cultural Society and intends to explore collaborative opportunities. There is unique story to be told, which has been featured in prominent mainstream media in the past.

Oceania:

1. Are there any new trends that you're seeing in the Oceania market in terms of responsible tourism?

   HTO is seeing a growth in consideration and value placed on Responsible Tourism. (Some of this information can be found on the Hawaiʻi Regenerative Tourism Website *for just a couple of examples on how this resonates with the Oceania market). Visitors from Australia and New Zealand, will often seek out tourism entities that have a proven commitment to sustainability, and social and environmental care. We are seeing more travelers seeking an official endorsement, or certification when choosing their accommodation or experience.*

2. We've seen changes with flight routes within the Oceania market. Can you speak directly to how we're seeing some of those changes play out or to anything you're doing to help with those relationships?

   We currently have several campaigns aligned with our airlift partners. Over the past 12 months, airlines have faced challenges generating demand outside of core markets. Unfortunately we can't speak directly to those changes, only from our viewpoints of speaking with the industry. An example is when a new route had been added last year by Qantas in Melbourne with nonstop service to Honolulu, where it seems that particular market was not strong enough to be able to perform on its own during this particular timeframe, leading to their withdrawal less than a year later. HTO did a robust partnership campaign to promote the launch of the new route. However, Qantas has since added additional capacity from Sydney to Hawaiʻi .

   It appears that there is growing momentum from the Qantas and Alaska–Hawaiian partnership (Hawaiian Airlines is officially joining the Oneworld alliance loyalty program on April 22, 2026 due to the merger with Alaska Airlines), which is expected to benefit our market due to the locations of these routes. Particularly through frequent flyer engagement by driving bookings, mileage accrual, and redemption.

Driving demand remains a key focus in the first half of the year, with an emphasis on partnerships that align with major retail brands and airlines to deliver measurable booking impact.

Japan:

1. If visitor arrivals continue to grow but length of stay declines or neighbor-island distribution remains concentrated, how will HTJ adjust strategies to ensure maximum economic and community impact from the Japanese market?

   Hawaiʻi Tourism Japan (HTJ) is already shifting from a volume-driven approach to a value-focused strategy, increasing per-visitor spend through campaigns and co-op programs and targeted promotion of affluent and senior segments with more personalized, experience-driven travel. We are also expanding neighbor-island distribution through FAM tours and close collaboration with partners, enabling travel agents to develop and sell multi-island itineraries beyond Oʻahu. In addition, our partnerships with airlines, agencies, and industry stakeholders are helping create more seamless and appealing interisland travel options. At the same time, we continue to embed Mālama Hawaiʻi principles into our programs, encouraging visitors to engage more deeply with local communities and culture. Together, these efforts ensure we are maximizing both economic value and positive community impact from the Japanese market.

2. If Hawaiʻi remains 3rd in search interest but continues to lag in bookings, what specific initiatives will HTJ implement to close that gap while also promoting sustainable, high-value visitation?

   HTJ is focused on converting strong search interest into bookings by strengthening airline and travel trade partnerships to offer compelling packages and seamless booking pathways. We are also enhancing our digital strategy with targeted, personalized content and clear calls to action that guide travelers from inspiration to purchase. Campaigns are designed to attract high-value segments and emphasize culturally rich, experience-driven travel that reinforces Hawaiʻi's premium positioning.

3. If Hawaii successfully attracts affluent Japanese seniors but visitation remains concentrated on just a few islands, what actions will HTJ take to maximize economic distribution and cultural engagement across all islands?

HTJ is expanding neighbor-island visitation by working with travel trade partners to develop senior-friendly, multi-island itineraries that highlight the unique experiences of each island. We support this with targeted campaigns, island-specific content, and partnerships with airlines, OTAs, and wholesalers to create more seamless interisland travel options. This approach helps distribute economic benefits more broadly while encouraging deeper cultural engagement.

4. Hula enthusiasts (1.5–2M) serve as cultural ambassadors; how is HTJ activating this niche audience to promote immersive cultural experiences and differentiate Hawaiʻi from other destinations?

   HTJ engages Japan's hula enthusiasts as cultural ambassadors by partnering with hālau, kumu hula, and cultural organizations to foster authentic connections. Through events, educational programs, and collaborations such as Hawaiʻi Expo × Ke Au Hou Festival, we provide immersive cultural experiences beyond performance. Hula is also central to our storytelling, positioning it as a gateway to Hawaiʻi's living culture and helping differentiate the destination through authenticity.

5. Why are Japanese visitors so Oahu-centric?

   Oʻahu is the primary entry point for Japanese travelers due to the concentration of direct flights into Honolulu. It also offers a wide range of accommodations, shopping, dining, and Japanese-language services, making it especially appealing for first-time and shorter-stay visitors seeking convenience and familiarity.

6. What is the status of Pre-Clearance?
   According to U.S. Customs and Border Protection, this is still pending. However, we can note that Japanese citizens have been eligible to apply for and obtain Global Entry status since November 2025.

7. You mention Kona flights may resume summer 2026. Would did be from Narita ?
   This question refers to a statement made by HTJ at the Spring Tourism Update on April 1, 2026, regarding an update about a nonstop flight from Japan to Kona possibly returning in summer 2025.

Answer: Yes, the discussions have been for this flight to be from Narita. However, the flight likely will no longer be resuming summer 2026 and is now pending resuming in summer 2027.

China:

1. Is there any airline partners expressed interest or capacity to operate Shandong–Hawaiʻi routes? What incentives (marketing support, route guarantees, promotional campaigns) could HTA provide to encourage airlines to establish these direct flights?
   At this time, Hawaiʻi Tourism Authority has not received any expressions of interest from airlines to operate routes between Shandong Province and Hawaiʻi. . Direct flights between China and the United States require regulatory approvals from both the U.S. Department of Transportation and the Civil Aviation Administration of China, and are currently subject to a bilateral cap of 100 weekly flights. When this cap is lifted, the initial recovery of direct air service is expected to prioritize major hub cities such as Beijing and Shanghai. The HTA will collaborate with airlines and the travel trade on marketing initiatives to support new direct air services connecting China and Hawaiʻi.

2. What steps are you taking to combat ramped fraud campaigns originating in China targeting travelers to Hawaii from China?
   If this inquiry concerns fraudulent accounts associated with credit card chargebacks on RedBook, the HTC has taken the following actions: Upon receiving reports from Hawaiʻi vendors, HTC promptly reported the issue to RedBook and the U.S. Embassy in Beijing. Official warnings were also posted on WeChat and RedBook to alert travelers and to identify legitimate booking channels, including major OTA platforms and authorized travel agencies. In addition, HTA sent a mass email to inform Hawaiʻi vendors of the situation. Vendor feedback indicates that implementing a two-step credit card verification process for online bookings helps reduce fraudulent chargebacks. Impacted customers are also encouraged to report fraudulent accounts directly.

Korea:

1. How is the chatbot educating visitors on responsible travel, cultural sensitivity, and sustainability practices?

The KakaoTalk-based AI chatbot is designed to guide visitors toward responsible, culturally respectful, and high-value travel throughout their journey. It integrates HTA's verified content to deliver real-time, contextual guidance at each stage:

- *Pre-trip: Highlights responsible travel principles such as mālama, cultural respect, and conservation*
- *Planning: Recommends experiences aligned with sustainability values, including cultural activities, community-based experiences, and neighbor-island travel*
- *In-destination: Provides situational guidance on topics such as beach safety, wildlife etiquette, and sacred site protocols*

2. Is there a mechanism to track whether travelers follow recommended guidelines, e.g., wildlife or sacred site etiquette?

   At this stage, the chatbot focuses on education and behavioral nudging rather than direct enforcement. We track engagement metrics such as clicks, time spent and repeat interactions to measure awareness and intent. The chatbot also uses scenario-based prompts to guide behavior—for example, offering guidance when users inquire about visiting culturally sensitive sites. Looking ahead, we are exploring additional tools such as post-visit surveys or pledge-based features to better assess impact. While direct verification of behavior is complex, these approaches help us measure influence and continuously refine messaging.

3. For Korea, how much of the Hula market world is being seen? Is there growth for bigger Hula Festivals and desire with Korean people? Like Japan?

   Korea's hula market is still relatively niche, with an established but smaller community of organizations, instructors, and local groups active since the early 2000s. There is gradual growth in festivals, including dedicated hula events and participation in broader cultural festivals supported by local governments in cities such as Siheung, Daejeon, and Anyang. Interest in hula is genuine, driven by appreciation for Hawaiian culture, wellness trends, and travel demand to Hawaiʻi, but it remains concentrated within a dedicated community rather than the general public. Compared to Japan, the market is significantly smaller and has yet to reach the same level of mainstream visibility.

Taiwan:

1. Provide an insight into trends/interest in Hawaii for the Taiwanese traveler?

   The Taiwanese travel market has shifted fundamentally, with international travel evolving from a luxury or recreational activity into an essential lifestyle commodity. This is reflected in outbound demand that has now surpassed pre-pandemic levels.

   According to a recent report on 2026 travel trends by booking.com, current interests and trends are driven by four distinct psychological pillars:

   - *Quiet Nature Escapes: This is the most significant trend, as there is a profound interest in "unplugging" from urban life through natural sanctuaries and secluded retreats.*
   - *Romantasy Retreats: Travelers are seeking "storyscape" environments—aesthetic, dream-like settings that blend romance with a fantasy-like atmosphere.*
   - *The Turbulence Test (Bonding Trips): There is an emerging trend of using travel as a compatibility test, where couples and friends choose challenging or remote experiences to strengthen their relationships.*
   - *Spontaneous Travel: "No-reason" travel is on the rise, characterized by last-minute decisions to escape for immediate rejuvenation.*

   Beyond these psychological drivers, Hawaiʻi Tourism Taiwan observed distinct areas of interest in Hawaiʻi products among consumers in the Taiwan market:

   - *Fly-Cruise Itineraries: There is an increased interest in comprehensive 11-day packages, with multi-night pre- and post-cruise stays on Oʻahu that include arranged local tours.*
   - *Outdoor and Sustainable Tourism: Interest is shifting toward "Outdoor Hawaiʻi" and active adventure. This is coupled with a growing awareness of Coastal Kuleana, where travelers seek to be stewards of the ocean and practice respectful, sustainable tourism.*
   - *Dual-City Products: Due to the high volume of weekly flights through gateways in Japan, Korea, and the Philippines, there is a perfect setting for products that combine Hawaiʻi with another major Asian hub.*

Cruise:

1. Could you speak to any early indicators you're seeing regarding the impact of the war and the flooding on bookings, cancellations, fuel costs, or ship rerouting?

Early indicators are beginning to emerge. The cruise industry has historically demonstrated strong resilience, with operator's adept at repositioning assets in response to geopolitical developments — and we're seeing that adaptability tested in real time.

At the time of the Spring Tourism Update meeting, Access Cruise had been aware of at least six vessels reported within the industry of being unable to reposition out of the Middle East, resulting in itinerary cancellations. Explora Journeys had also announced itinerary changes to the region. Despite this disruption, cruise lines have broadly maintained that overall booking demand remains strong.

On the cost side, fuel is becoming an increasing pressure point. Several European brands have signaled their intent to introduce fuel surcharges for the duration of the conflict, and Carnival Corporation has revised its Q2 outlook downward, citing rising fuel costs as a key driver.

2. What is the status of the additional GET tax being charged to cruise passengers?

   The "Green Fee" as it applies to cruise passengers is currently on hold, due to a lawsuit, with an appeal and results pending, filed by the Cruise Line International Association (CLIA). While enforcement is paused, some cruise brands have proactively begun collecting the tax and holding those funds in reserve — anticipating either retroactive collection or the introduction of a new Head Tax down the line.

   On the legislative front, a proposed bill was introduced to require a per-person port charge, otherwise known in the industry as a "head tax". The intention of the proposed bill is to replace the "Green Fee" (as it pertains to taxation on cruise passengers only), which is more of a taxation on cabin fare (not common in the industry) vs. a per-person head tax. As such, the situation remains fluid due to the combination of the pending lawsuit and legislative session that are both active.

3. Which cruise market segments (contemporary, premium, luxury, expedition) are most likely to target Hawai'i in 2026–2027?

   The contemporary brands represent approximately 59% of the capacity which visits Hawai'i led by the Pride of America (POA). POA accounts for 34% of all cruise capacity (based on port bookings of their total ship capacity, not actualized *passenger counts at the time of disembarking to sea). Premium brands represent 38% of capacity to Hawai'i led by Princess Cruises.*

4. Are there strategies to target emerging cruise markets like China, Japan, and Singapore specifically for Hawai'i itineraries?

   Strategies for the cruise industry are B2B driven. 95% of the cruise capacity comes to Hawai'i from the US cruise brands who primarily focus on sourcing from North America, based on port bookings. There are limited brands sailing from China, Japan and Singapore. The emerging markets for Asia who source from the Asian markets, focus on home ports in the region and short sailing itineraries.

5. How can Hawaii leverage global cruise deployment trends to capture high-value passengers from Asia-Pacific or European markets?

   There is an emerging high-end yachting segment developing within the cruise segment including Ritz Carlton, Four Seasons, Orient Express and Aman at Sea. These brands focus on ultra-high-net-worth individuals. All these brands are relatively new to the industry. Ritz Carlton will make their Inaugural cruise to Hawai'i in 2026 and are scheduled to return in 2027. The vessels are small (between 100-400 guests) and rarely repeat itineraries in the same year. In the grand scheme of the cruise industry, their impact is limited.

6. How can Hawaii leverage AI and digital tools to enhance the cruise passenger experience onshore, such as itinerary planning or cultural engagement?
   Across the globe, there has been a decline in tour participation. AI and digital tools can support independent cruise passengers to guide them to planning positive experiences within the Hawaiian Islands. This also applies to education on cultural engagement.

7. Could you collaborate with cruise lines to highlight high-value experiences, such as wellness tours, Hula workshops, or neighbor-island excursions, through onboard technology?

   Access Cruise works on behalf of HTA to assist in making introductions between local stakeholders and key contacts with the cruise lines for any type of experience available within the Hawaiian Islands, and work with the cruise lines to provide localized content for onboard posting/use when applicable. Any local stakeholder is welcome and encouraged to reach out to Access Cruise if an introduction would be *helpful. Based on HTA's Strategic Plan, the type of experiences that are of highest of importance as a state, such as authentic, culturally related initiatives & programs, are pitched to cruise lines for consideration on how those overall concepts may come to life for the cruise lines in partnership local stakeholders.*

8. What are you hearing directly from cruise lines about Hawaiʻi right now in terms of interest and confidence in the destination?

   Hawaiʻi consistently rates high for guest satisfaction. The cruise industry deploys ships based on consumer demand. Forecasts for 2026 are currently trending strong. However, the cruise industry has the ability to make adjustments quickly if demand is not present. While not frequent, they will re-deploy vessels if they are not filling capacity.

9. Where are you seeing continued commitment or even growth from cruise lines in Hawaiʻi and can we expect more cruise calls as cruise lines reposition from the Middle East?

   While the cruise industry seems to be closely monitoring the Middle East, there was limited capacity in the region. The Eastern Mediterranean is a region to watch should the war continue due to a higher volume of cruise travelers in that region. Associated ships will begin their annual transitioning back to Europe in April due to seasonality. In the short-term, it is not seen as much of an opportunity for an increase in market share to Hawaiʻi as a result of conflict in the Middle East. The fuel cost of repositioning vessels around the world is likely too high for the cruise industry to make significant changes at the present time, with the exception of ships in the Middle East.

Destination Stewardship:

1. What percentage of HTA funding will directly support local entrepreneurs, Native Hawaiian practitioners, and small operators versus large legacy players

   The Hawaiʻi Tourism Authority is currently reviewing the Fiscal Year 2027 budget, and we will share that information once the process is complete. We remain committed to supporting programs that support small businesses, local entrepreneurs, and Native Hawaiian practitioners.

2. Each year since COVID-19 Pandemic, we keep losing more Native Hawaiian small businesses & the true culture of Hawaii. How can we create a greater impact holistically to visitors experience of Hawaii ?

   HTA recognizes the importance of supporting Native Hawaiian and local small businesses. HTA encourages visitors to participate in authentic experiences that support our communities. Through our brand marketing and educational messaging, we highlight opportunities for visitors to support local makers, practitioners, and small businesses. In addition, we provide funding support for community-based tourism projects and events through our Community Enrichment, Kūkulu Ola, and Signature Events programs.

3. Which events or projects under the Community Enrichment Program have demonstrated the highest visitor engagement and economic impact?

   Two Community Enrichment Program events that we want to highlight are the Old Kapaʻa Town First Saturday Art Walks and the Annual Maui Marathon and Half-Marathon. Both events showcase local talent and engage both residents and visitors in memorable ways. Based on attendance, we estimate that these events generate millions in direct visitor expenditures and consistently draw over thousands of out-of-state attendees.

4. What initiatives are in place to educate visitors about ocean safety and reduce drownings and other ocean related injuries? Are there any specific efforts to create awareness via videos, social media campaigns, or flyers that aim to raise awareness?
   Visitor ocean safety education is delivered through a coordinated, statewide approach that reaches visitors before and after arrival. This includes the Kuleana Campaign and short-form video content that highlight safe ocean practices. These campaigns use trusted local voices, along with airport displays, geo-targeted digital ads, and partner platforms. Safety information is also centralized on GoHawaii and reinforced through airlines, hotels, and activity providers. These efforts prioritize simple, actionable guidance—such as swimming at lifeguarded beaches and checking conditions—ensuring consistent messaging across multiple touchpoints to raise awareness and help reduce ocean-related injuries and drownings.

5. When granting funds to signature events or smaller events - are the grants tied to a media goals measured with viewership from outside of Hawai'i?

No. Awards for Signature Events, Community Enrichment, Kūkulu Ola, Kahu ʻĀina, and Hoʻokipa Malihini are not tied to out-of-state viewership. While media exposure outside of Hawaii is a requirement for the Signature Events program, funding decisions are based primarily on the project's alignment with the program objectives, its impact on the community, and its ability to support HTAʻs broader brand and strategic priorities.

Starting with the July-December 2026 project cycle, media goals will be evaluated as key performance indicators (KPIs) along with attendance and satisfaction ratings for all HTA Community Funding Programs. HTA evaluates marketing performance using the KPI sections in the post-event reporting framework, which include both outcomes and clearly defined media metric goals. These may include targets for earned media impressions, social media reach and engagement, digital performance metrics such as unique users, page views, and click-through rates, broadcast or streaming audience estimates, paid media deliverables, and geographic audience distribution. These media metric goals help HTA assess whether Signature Events are effectively leveraging marketing resources, supporting statewide branding efforts, and contributing to HTA's broader strategic objectives.

6. It seems that announcing CEP and Signature grants for Q3 and Q4 2026 that late in the game is causing budgetary problems for events - do you plan on announcing these awarded grants earlier so these events can plan ahead?

   The application period for the July 2026 to December 2026 project cycle for the Community Enrichment Program, Kūkulu Ola, and Signature Events opened on April 9, 2026. Proposals are due by May 7, 2026. Application materials are available at: kilohana.com/umeke. *The application period for the January 2027 to December 2027 project cycle is estimated to open in September 2026.*