



HAWAII
VISITORS & CONVENTION BUREAU

HAWAII TOURISM CONFERENCE

Hawai'i Tourism United States Update

23 September 2025



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MARKET SITUATION



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U.S. MARKET SITUATION

YTD Performance Through July 2025



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U.S. MARKET SITUATION

Headwinds *YOY Performance* *July 2025 Data*



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U.S. MARKET SITUATION

Airlift and Access



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The Evolving U.S. Traveler Landscape

Travelers are motivated by experiences:
they seek sustainability, cultural connections,
and opportunities to engage with our local communities.
These interests are reshaping both travel planning and
on-island behavior.



Regenerative Tourism Mandate

§201B-1 “Regenerative Tourism” means a tourism model that:

- (1) Tourism practices that contribute to the restoration and enhancement of local ecosystems, adhere to sustainable practices, respect and preserve local culture, and support the local community*
- (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, indigenous communities, and visitors.*



Regenerative Tourism Framework

SB2659, Act 128

- 1. Incorporates a Regenerative Framework*
- 2. Commits the State to a Regenerative Visitor Industry*
- 3. Supports Culturally- and Environmentally-Aligned Visitor Behavior*
- 4. Prioritizes Values-Aligned Markets*
- 5. Promotes Equity and Career Advancement*
- 6. Mandates Tourism Functional Plan Updates*



The Derivations and Domains of Regenerative Tourism

Derivations

- 1. Visitor*
- 2. Host*
- 3. Enterprise*
- 4. Governance*
- 5. Āina momona*

Domains

- 1. Ecological*
- 2. Cultural*
- 3. Social*
- 4. Economic*
- 5. Narrative*



OLA HAWAI'I



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2026 PLAN HIGHLIGHTS

The Hawai'i Target Traveler



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2026 PLAN HIGHLIGHTS

Media Mix: How We Reach Consumers



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2026 PLAN HIGHLIGHTS

Public Relations / Earned Media



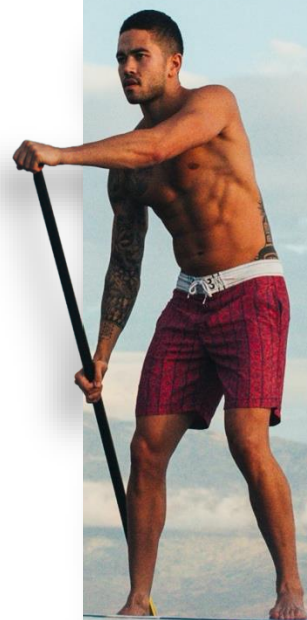
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2026 PLAN HIGHLIGHTS

Travel Trade & Advisor Engagement



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2026 PLAN

When travellers come to understand Hawai‘i through the eyes of those who live here, they are impacted by what it means to be connected to this place. This perspective deepens respect, shifts behaviour, and ensures tourism benefits residents, ‘āina, and visitors.

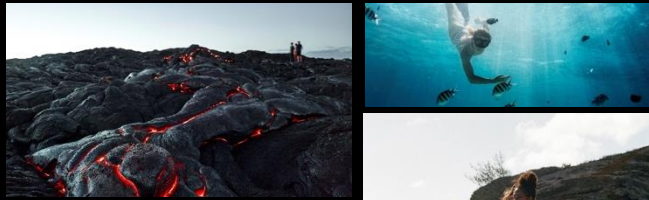
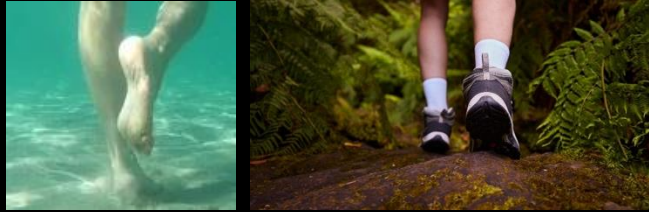


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HAWAI'I STAYS WITH YOU



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*WHERE ANOTHER WAY OF LIFE
CAN CHANGE YOURS*



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2026 PLAN HIGHLIGHTS

Partnership Opportunities



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An underwater photograph showing a diver in the upper left, surrounded by a massive school of fish. Sunlight filters from the top right, creating a bright, ethereal glow. The title 'The Bottom Line' is centered in a white serif font.

The Bottom Line



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MAHALO



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