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ADVISORY BOARD MEETING
OF THE
HAWAIʻI TOURISM AUTHORITY

HYBRID MEETING

WEDNESDAY, MARCH 25, AT 9:30 A.M.

Hawaii Convention Center
Parking Level | Executive Boardroom A
1801 Kalakaua Avenue
Honolulu, Hawaii 96815

Meeting will be live-streamed via Zoom

https://us06web.zoom.us/j/84227774301

You may be asked to enter your name. The Board requests that you enter your full name, but you may use a pseudonym or other identifier if you wish to remain anonymous. You may also be asked for an email address. You may fill in this field with any entry in an email format, e.g., *****@***mail.com.

Call In: +1 669 444 9171 US
Webinar ID: 842 2777 4301

Members of the public may provide written or oral testimony on agenda items. Oral testimony (in-person or via Zoom) will be limited to five minutes for each testifier per agenda item. Signup for oral testimony in-person will be at the registration table in the meeting room. Signup for oral testimony via Zoom will be accepted through the Q&A feature on Zoom.

Written testimony received ahead of the preparation of the board packet will be included in the board packet. Written testimony received after the issuance of the board packet (three full business days before the meeting) will be distributed to the board and available for public inspection at the meeting. Email written testimony to Carole Hagihara-Loo at Carole.M.Hagihara@hawaii.gov or hand-deliver or mail to the Hawaiʻi Tourism Authority office, 1801 Kalākaua Avenue, 1st Floor, Honolulu, HI 96815.

AGENDA

1. **Call to Order**

2. **Roll Call to Announce Name of Participating Board Members and to Identify Who Else is Present with Board Member if the Location is Nonpublic**

3. **Approval of Minutes of the February 26, 2026, Advisory Board Meeting**

4. **Report of Permitted Interactions at Informational Meetings or Presentations Not Organized by the Board Under HRS section 92-2.5(e)**

5. **CEO Report** *9:45 a.m.*

6. **Review and Discussion on Current Legislative Bills** *10:05 a.m.*

HB 1590 HD3	Relating to Vacation Rentals
HB 1950 HD1	Relating to the Transient Accommodations Tax
HB 1800 HD1	Relating to the State Budget
HB 2195 HD1	Relating to Transportation
HB 2268 HD1	Relating to Film Production
HB 2585 HD3	Relating to Agricultural Tourism
SB 2577 SD2	Relating to Sports Tourism
SB 2698 SD2 HD1	Relating to Transportation
SB 2921 SD1	Relating to State Fund

7. **Discussion and Assignment of Board Members to the Governance Study Permitted Interaction Group (PIG)** *10:20 a.m.*

8. **Update on the CEO Search** *10:30 a.m.*

9. **Presentation and Discussion of Current Market Insights and Conditions** *10:40 a.m.*

10. **Presentation and/or Discussion of Japan Affluent Market Research Findings** *10:50 a.m.*

11. **Presentation and/or Discussion of U.S. Maui Emergency Marketing Campaign Final Results** *11:10 a.m.*

12. **Presentation and/or Discussion Examining Global MCI (Meetings, Conventions, Incentives) Market Conditions and Identifying Opportunities for Hawaiʻi** *11:25 a.m.*

13. **Adjournment** *12:00 p.m.*

*** Executive Session: The Board may conduct an executive session closed to the public pursuant to Hawai‘i Revised Statutes (HRS) § 92-4. The executive session will be conducted pursuant to HRS § 92-5 (a) (2), § 92-5 (a)(4), § 92-5 (a)(8) and §201B-4(a)(2) for the purpose of consulting with the board's attorney on questions and issues pertaining to the board's powers, duties, privileges, immunities, and liabilities; to consider hiring and evaluation of officers or employees, where consideration of matters affecting privacy will be involved; and to discuss information that must be kept confidential to protect Hawai‘i's competitive advantage as a visitor destination.
Pursuant to Section 531.5, of the Budgetary Control Accounting Manual, State of Hawai‘i, lunch is served as an integral part of the meeting, while the meeting continues in session, and not during a break.

If you require an auxiliary aid/service or other accommodation due to a disability, please contact Carole Hagihara-Loo at (808) 973-2289 or carole.m.hagihara@hawaii.gov as soon as possible, preferably at least 3 days prior to the meeting. **Requests made as early as possible have a greater likelihood of being fulfilled.** Upon request, this notice is available in **alternative/accessible** formats.

In accordance with HRS section 92-3.7, the Hawai‘i Tourism Authority will not establish a remote viewing area for members of the public and board members to view and participate in meetings held using interactive conference technology (ICT) because there will be an in-person option for members of the public and board member to view and participate in the meeting.

3

Approval of Minutes of the February 26, 2026, Advisory Board Meeting

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ADVISORY BOARD MEETING
HAWAIʻI TOURISM AUTHORITY
Thursday, February 26, 2026, 9:30 a.m.

Virtual Meeting

MINUTES OF THE ADVISORY BOARD MEETING

MEMBERS PRESENT:	Kimberly Agas (Co-Vice Chair), James McCully (Co-Vice Chair), Leah Belmonte, Mericia Palma Elmore, Terry Fischer, Joel Guy, Troy Lazaro, Danny Ojiri, Lisa Paulson, Chris West, Linda Wong
MEMBER NOT PRESENT:	Lānaʻi Tabura
HTA STAFF PRESENT:	Caroline Anderson, David Uchiyama, Talon Kishi, Jadie Goo, Milton Lafitaga, Kendrick Leong, Jill Radke, Carole Hagihara, Lindsay Sanborn
GUESTS:	Dir. James Tokioka, Jennifer Chun, Martha Garcia
LEGAL COUNSEL:	John Cole

1. Call to Order

Co-Vice Chair Agas called the meeting to order at 9:31 a.m.

2. Roll Call to Announce Name of Participating Board Members and to Identify Who Else is Present with Board Member if Location is Nonpublic

Mr. Uchiyama conducted the roll call, and members were in except for member Tabura, who was excused.

3. Approval of Meeting Minutes of the January 29, 2026 Advisory Board Meeting

Co-Vice Chair McCully moved the motion to adopt the minutes, and Member Elmore seconded it. The motion passed unanimously.

Co-Vice Chair Agas asked Member Lazaro do a cultural opening protocol. He shared the ʻŌlelo Noʻeau today called He Aliʻi Ka ʻĀina He Kauwā ke Kanaka, which means the land is Chief; man is its servant.

4. Report of Permitted Interactions at Informational Meetings or Presentations Not Organized by the Board Under HRS section 92-2.5(e)

There was no input on Permitted Interaction Groups.

5. CEO Report

Dir. Tokioka thanked everyone for their hard work. He confirmed they had started with the goal of working with the legislature and regaining their trust. He confirmed that the legislature has introduced a bill that may restore some of the exemptions for events. He took this opportunity to thank them, specifically the Senate, where Senator DeCoite introduced a short-form bill regarding event procurement. He also thanked the sports and film committees for their commitment. He gave the film committee credit for all the productions currently in town.

Member Elmore was grateful to be working there.

The Director passed on greetings and gratitude from John Wells. He confirmed that 120 members were currently working on the three projects and that Gov. Green was very appreciative and supportive of both the film committee, the sports committee, and the administration teams.

There were no questions from the Board members.

Ms. Anderson thanked their hardworking staff for all they do to carry out their initiatives. She confirmed that the CEO report reflects all the work our staff has done.

She confirmed that they continue to engage with the legislature and have been down there testifying. She thanked Jill Radke and Carol Hagihara and confirmed that Ms. Radke would provide an update on where all the bills are.

She confirmed that the HCC rooftop terrace deck repair project is on track, and that Martha Garcia, senior project manager with Rider Levett Bucknall (RLB), would provide a brief presentation on their progress.

For emergency preparedness, she confirmed that Mr. Uchiyama has been doing an excellent job working with HiEMA and that we have the right things in place when a crisis occurs.

Community Programmes - Ms. Anderson thanked Dede Howa and Lindsey Sandborn for all that they do, and Kilohana. She confirmed that from January through February, they had subtitled 31 cultural, sporting, and community events statewide, including festivals, hula shows, and conservation work days

For the destination app, she recognized Meagan DeGaia for her work in this, and Dir. Tokioka, the HVCB, and Jennifer Chun. She confirmed that the DBEDT survey is now available in the GoHawaii app so visitors to Hawaiʻi can fill it out. She advised that the information from this survey is really important for decision-making.

For workforce development, she recognized Dede Howa for her work. She confirmed that this is a partnership with the TIM School that offers five full fourth-year, full-time, full-term scholarships to public school seniors who want to work in Hawaii's visitor industry. The deadline to submit applications is March 1.

Global marketing team - she thanked Jadie Goo, acting Chief Brand Officer, and her team, Christina Tuchman and Jennifer Bastiaanse, for what they are doing with their global team. She highlighted their efforts with Hawaiʻi Tourism Canada during the Winter Olympics, which aired on TV, and the Hawaiʻi State Review campaign. She thanked the HVCB for developing the assets and the campaign. She noted the synergy with how Hawaiʻi Tourism Canada has taken those assets and carried them forward in the Canadian market.

Destination Management Action plans - she thanked planner Kendrick Leong and destination managers Patricia Ornellas, Meagan DeGaia, Kui Adolpho, Blane Andrade, Matthew Sueda, and the Ward Research team. She confirmed that the draft plans have been presented to the community and that the public is invited to provide feedback on the website. She advised that webinars were also held over the last two weeks on this topic.

Strategic plan - she thanked the Strategic Plan group for their guidance and the HTA staff for their contributions.

Mr. Lafitaga gave an update on Sports at the HTA. Mr. Lafitaga shared slides showing the events they participated in on Hawaiʻi Island, in partnership with the Seattle Seahawks. He advised that the development team arrived a week before the Super Bowl game and hold two well-supported camps for the girls at Waiakea High School. He confirmed that many were participating for the first time and were aged 13–18 (from ninth grade to seniors). Around 200 participants were involved, with many volunteer coaches and three athletic directors. They participated and helped coach and man some of the stations. Many of the participants had also been involved in flag football with their local high schools, and they were able to receive some professional training with the NFL teams that came in.

He advised that the synergy manager helped bring this to fruition. He confirmed that he also worked with Craig Tom, the Seattle Seahawks development manager, to bring this to the neighbor islands, and that they did so at no cost to the HTA.

Mr. Lafitaga confirmed that he and Matthew Sueda drove to the Kona at The Kealakehe High School. About 60 girls came out on a hot Sunday to learn skills and drills to help elevate their game. He was pleased that one of the top 50 legends who had played six seasons with the Seattle Seahawks during 2009 and 2014, Max Unger (offensive line center) helped out and showed the girls some of the skills he had learned.

Mr. Lafitaga advised that many were grateful for the opportunity to participate in their hometown, which saved them extra travelling costs.

He gave an update on the Sony Open numbers. He thanked the chairs of Sony. The total number of visitors from out of state was 16,162. The average length of stay was about 2 weeks or 10 days. Japan visitors spent 6 nights or 6 days, while Canada visitors spent 12 days. The total expenditure with the U.S. mainland is $194, Japan is $246, and Canada is at $166. The total expenditure, or economic impact, of the Sony Open was $53,737,196.

He felt that the HTA should continue to encourage Sony and the PGA to have this event here in Hawaiʻi.

He ended his presentation and invited any questions.

Member Fischer asked what the budget and outlay were for Sony. Mr. Lafitaga confirmed it was $655,000.

Co-Vice Chair McCully asked about what the dollar spent equated to. Mr. Lafitaga replied that his figures were the total numbers spent for visitors and locals.

Member Ojiri asked if there is an update on the future of the Sony Open. Mr. Lafitaga replied that they are still in discussion with the PGA team and are still looking at their scheduling. It depends on the PGA Tour when they release the schedule. He said they are looking to scale down their schedule and most. Because the players are looking to reduce some of the signature events. So as far as Sony, they are still negotiating with the PGA Tour after next year. There was nothing signed, but he confirmed that Sony will indeed be involved in 2027.

Dir. Tokioka confirmed that the schedule would be very different in 2028, as host and chair Tiger Woods announced at Riviera Country Club. He said there will be changes, and Brian Rolapp, the new president and CEO of the PGA Tour, informed the governor that they would downsize from 44 tournaments to fewer than 30, focusing on signature events like Pebble Beach, Riviera, and the Phoenix Open. He advised that although Sony Open was viewed as one of the smaller tournaments, they are still very comfortable continuing with it. He reported that the governor had reached out to some decision-makers, including people close to Tiger Woods, to let them know that Hawaiʻi is very interested in continuing the relationship, though it does not want to compete with the NFL or the playoffs. He clarified that the schedules will change. He advised that the TY company from Japan, which hosted the Sentry, wants to continue due to the value it adds to Maui and West Maui through job creation and economic spending. He applauded both Mr. Tadashi Yanai and Sentry, who donated $800,000 and $1 million, respectively, to the charity, even though the tournament was not played this year.

He confirmed that they would stay connected so that when things happen, they will be in the know and their voices would hopefully still be heard.

Ms. Anderson asked the members to save the date of March 13 for Tourism Day at the Capitol. She confirmed that the staff has been working with Hawaiʻi Hotel Alliance and The McClellan Group to organize this. She also confirmed that the Hawaiʻi Tourism Authority's Spring Tourism Update will be held on April 1.

Dir. Tokioka advised that the Tourism Day would be highlighted by music by Kapono and Olomana, and hula shows by Tihati. He confirmed that a new group would be running it and that it would get many hotels and restaurants to participate.

Mr. Uchiyama said he has worked with many accountants and wanted to recognize Mr. Kishi for earning the right to be the VP of Finance for the HTA. Co-Vice Chair McCully seconded this.

Co-Vice Chair McCully said that earlier, they had requested that Ms. Chun be available to provide a DBEDT download at their meetings. He said Ms. Anderson should, from time to time, receive reports from Kilohana and the HVCB so that, as an Advisor Board, they are more aware of what the contractors are doing, as they make up a large part of our budget. Ms. Anderson said this would be actioned accordingly.

Dir. Tokioka said Ms. Anderson was a big part of resolving back payments, and that the amount the HVCB was owed was astronomical. He is very appreciative of the HTA and the team for ensuring everything is in compliance. He thanked the entire faculty house team.

Ms. Anderson pointed out the dashboards towards the end of the CEO report. She thanked Mr. Leong, the planner, for working with the brand team. She advised that this shows where each global marketing team is tracking against the measures identified in their contracts. The dashboard also shows the 2025 annual results and highlights how they have met or exceeded their targets, which will be reported on each quarter, along with the community programmes. The calendar will show the Board when these types of reports will be provided, as recommended by the auditors, and will communicate the results clearly.

Mr. Leong confirmed there were no public testimonies or questions online for review.

6. Update on the Hawaiʻi Convention Center Rooftop Construction

Ms. Anderson introduced Martha Garcia, senior project manager for RLB. She confirmed that they were appointed about two years ago as project managers for the rooftop repairs and other repairs at the HCC. Ms. Anderson advised that an architect/engineer was also hired, and in December, they contracted with the construction company for the repairs. She thanked the team and Ms. Orton and her team for their involvement.

Ms. Garcia provided an update and showed some images of their progress. The project was broken down into four phases:

Phase 1 (January – July, 2026)

- Mobilization, fencing, survey existing conditions (Swinerton Builders Fencing)
- Interior and rooftop demolition
- Structural upgrades
- Canopy piers

Phase 2 (July 2026 – February 2027)

- Canopy and MEP (mechanical, electrical, and plumbing) installation
- Deck repairs and MEP

Phase 3 (February 2027 – June 2027)

- Re-roofing

Phase 4 (June – November 20 27)

- Finishes

Ms. Garcia confirmed that there has been significant activity by Swinerton since they moved onto the site in January. They set up their offices and began securing the site in preparation for demolition and surveying the condition of the existing building. She showed images of the barricades the contractor had erected to prevent people from walking through. During January, the contractor started removing the rooftop finishes and the topping slab on level 4. They are taking care of the old landscaping planters and the plants, removing the soil, and taking care of the space that used to have the water feature.

On level 3, Ms. Garcia confirmed that they assessed the condition of the existing finishes and took the necessary steps to protect the existing walls and carpets. They pulled down the acoustic panels to protect them from damage. They also removed the existing fireproofing from the main structure to check the condition and the structure of the building. At the back of house, where the kitchen is, she confirmed that they pulled down the ceiling to check for any damage or rust on the deck before undertaking the extensive repairs. In February, they started in the level 3 meeting rooms to assess and then undertake the necessary protection.

Inclement Weather and Water Mitigation: Ms. Garcia advised that each project has its own challenges. The next images showed how Swinerton put measures in place to protect as much as possible and to ensure any leaks were contained and the building was protected. She confirmed they have a team for flood alerts issued. They come to the site as needed, 24/7, to ensure the building remains dry. She confirmed that the project is on schedule and on budget, but they are facing some challenges with the building permit. Ms. Garcia advised that they were consulting with the HTA and had provided all the necessary information to enable the HTA to finalize their review and, hopefully, have the permits released. She showed some images of how the team had kept the roof dry. She confirmed that the HCC has also installed a live camera, which can be viewed at any time as they progress, and advised that this was posted on the Hawaiʻi Convention website.

She advised that there is still a lot of demolition to be done and undertook to keep everyone updated on progress. She invited questions from the meeting.

Co-Vice Chair Agas commended the team for their good management during the recent rains and asked whether they encountered anything during the demolition that they hadn't anticipated.

Ms. Garcia advised that what they had already uncovered was very close to what the design team had communicated through the drawings during the RFP process. She said they are in a good place right now.

Co-Vice Chair Agas asked if they have the right support to help with the DPP or the permits. Ms. Garcia confirmed that they do, and that Bryan Gallagher is in active communication with the design team, and that every time they request a document, they return it promptly. However, they would like to accelerate this process as much as possible. She highlighted that one of the critical items is the procurement of the canopy, and they are awaiting written confirmation from the DPP that they can proceed.

Co-Vice Chair Agas asked Ms. Garcia to keep Teri Orton and the team updated regularly and to communicate with them if they felt they were going to hit a snag on a timeline or need any help. Ms. Garcia confirmed that they would. She said they are in constant communication with Ms. Orton and the whole team.

Co-Vice Chair McCully asked whether it was normal for public repair projects to go over budget. He noted when reviewing something at the stadium not long ago that the Data point says 9 out of 10 public projects for repair and rebuild go over budget. He asked her to confirm that theirs was a standard public procurement process, not a design-build. Ms. Garcia confirmed yes. She confirmed that the design was completed last year and that they submitted it to DPP, explaining that this is a typical process in Hawaiʻi and that the permit process always takes longer than usual. Co-Vice Chair said this year it is taking longer to the get the permitting approval. He asked Ms. Garcia to confirm how far the permit approval was from being finalized. Ms. Anderson said they are working closely with the City and County DPP, and Dir. Tokioka is in communication with the Mayor and Dir. Apuna in this regard. They are just waiting for approval. Co-Vice Chair McCully asked whether they have an exemption to begin the work without a permit.

Ms. Garcia confirmed that they have permission to proceed with the work before the release of the permit, that the last thing they were waiting for from them was the fireproof floodproofing report, which was submitted a week ago. She was hoping to receive the permit within the next two to three weeks.

Co-Vice Chair Agas confirmed there was no public testimony or questions online.

7. Presentation and Discussion of Current Market Insights and Conditions

Ms. Chun confirmed they are already ahead of 2025 for visitor expenditures and visitor arrivals. She highlighted that many people had come from the U.S., with an increase in visitor arrivals from the U.S. West and U.S. East. She confirmed double-digit increases in arrivals with significant increases in expenditures.

She noted that, due to the HTA campaign, they were seeing significant increases in Maui and in the number of hotel-only visitors in the U.S. West and U.S. East, with ties to the January figures. Hotel performance statewide is only a 1.9% overall occupancy increase, with average daily rates basically flat and RevPAR slightly up. On the vacation rental side, there were decreases in January for occupancy and ADR.

She showed two charts reflecting the size and the volume of hotel and vacation rental demand. Vacation rental demand is just a fraction of hotel demand, yet it sometimes gets a lot more attention. She showed a slide with the TAT collections, which shows great results as expected. She confirmed that it was the average for the last few years, starting with January 2021. She commented that this was the highest collection they have had in a long time, similar to January 2023, when all the revenge travel drove it. Looking at the airports for January, she noted that Hawaii's airports were very busy but very similar to what was seen before, with not a big increase in the number of people coming through. She noted that Kahului had more people, which aligns with the increase in visitor arrivals to Maui, but there was a slight decrease in Kona and a small increase in Lihue.

Looking at load factors for January 2026 versus January 2025, she noted a slight decrease in domestic and international load factors. She hoped that in the coming months there would be fuller flights. She drew attention to the number of scheduled non-stop seats and noted that, overall, for the state, there was an increase in seats for January 2026 versus 2025, although not across the board. She noted that although there were higher increases, for example, in Kona than in Honolulu, there are more flights to Honolulu anyway.

She advised that February and March also showed an increase in non-stop seats for domestic and international down. She noted a decrease in domestic seats for March for Honolulu and also for April, the return of one flight to service Hilo direct from the mainland - The Las Vegas flight from Southwest.

Ms. Chun drew attention to a decrease in domestic seats for March and April affecting Honolulu, noting that the only flight returning to Hilo direct from the mainland is a special service tied to the Merrie Monarch event. This service is not part of the regular schedule and is not slated to begin until later in the year. On the broader market trends and insights side, there were numerous slides, but Ms. Chun indicated they would skip almost all of them to focus on key points. Specifically, attention was given to the relationship between the Japanese yen and U.S. visitor arrivals to Hawaiʻi; the Board's question last month was whether a stronger yen correlates with increased visitation. The presented data suggest that there isn't a clear trend of more visitors as the yen strengthens, while the Canadian dollar appears to follow a more pronounced trend in line with exchange rate movements. The takeaway is that, for the Japanese market, visitation is influenced by multiple factors beyond exchange rates, suggesting a more complex mix of drivers.

Additionally, the discussion included a recent STR hotel forecast for 2026, noting stable occupancy, minimal ADR change, and flat RevPAR, with slightly higher growth projected for 2027. The analysis emphasized looking at each island separately. For Oʻahu, Mr. Eslinger from HVCB and the STR forecast team discussed expectations that the market would remain essentially flat in 2026, with a marginal uptick in ADR and RevPAR, followed by a somewhat stronger uptick in ADR and RevPAR in 2027. Maui County was forecast to see an increase in occupancy, accompanied by a decrease in ADR and a slight decline in RevPAR, with all metrics anticipated to rebound in 2027. Hawaiʻi Island appeared largely flat in occupancy with ADR and RevPAR both expected to rise, continuing the positive trend into 2027. Kauai was forecast to show a decline in occupancy but increases in ADR and RevPAR, with all metrics expected to rise in 2027.

A critical caveat underscored in the briefing was that the STR forecast had been prepared a few weeks earlier, before certain developments that could affect the market were known. Specifically, events such as ongoing instability in Mexico were not factored into the forecast, despite the potential to influence traveler behavior—where groups might consider moving to Hawaiʻi due to safety concerns, and leisure travelers might adjust their plans with longer-range considerations in mind. The speaker acknowledged these unaccounted-for factors as opportunities that could influence Hawaii's market opportunities going forward.

Ms. Chun commented that 2026 may be a better year than previously anticipated. She noted that work is underway on the DBEDT tourism forecast and that optimism is high in certain markets, while others remain less optimistic. Building on the discussion from the last Board meeting about traveler profiles, she presented an example of what the traveler profile looks like. The example is available on the HTA website under "other research," specifically within the U.S. Traveler profile. The HTA subscribes to data similar to that seen for responsible travelers, collected from multiple markets: the United States, Japan, Canada, Australia, and Korea. These populations are surveyed daily, with new data available weekly; data are compiled for the U.S. on a monthly basis, for Canada on a quarterly basis, and for the other markets on a half-yearly basis.

A key point for this report is the definitions used in the full report on the HTA website. For the U.S., the average traveler is defined as having a household income of around $100,000, aged 25 to 54, planning an international vacation likely to book soon, who has visited Hawaiʻi or Alaska, with the next leisure destination being Hawaiʻi or Alaska. Alaska is included because it is a distant market relative to the mainland, suggesting that travelers willing to go to Alaska may have travel patterns similar to those considering Hawaiʻi, i.e., long-distance travelers. The national representation (Nat rep) is also provided. When examining residents by segment who match the 100k traveler profile, the top origins are California, New York, and Texas, with California standing out as the number one market. This aligns with expectations, as California residents are heavily represented among frequent travelers.

The report also highlights the importance of travel factors, broken down by segment. Attributes such as comfort and accessibility, value for money, entertainment and nightlife, consideration of sustainable principles, natural attractions and activities, cultural attractions, opportunities to experience local restaurants and businesses, and family-friendly options are assessed for their relative importance across markets. Across the U.S., safety and security are emphasized as critical attributes for Hawaiʻi as a destination. The report notes a high level of agreement among the U.S. 100k travelers and the avid traveler segments regarding these attributes—specifically, that Hawaiʻi is a fun and exciting destination, a dream destination for many, a place where travelers intend to save for future trips, and that the love of travel motivates their plans. The deck includes similar attribute and agreement analyses for other markets, and the fuller report is available on the HTA website.

Regarding Japan, the chosen traveler profile emphasizes affluent, avid, and active senior travelers. For Japanese travelers, safety and security remain highly important, and there is strong agreement with statements about Hawaiʻi as a safe, secure destination. For Canada, the profile includes older avid travelers and senior travelers, with value for money marking as a very important consideration. The bottom lines show that safe and secure destinations resonate across markets, reinforcing Hawaii's positioning in traveler perceptions. When Hawaiʻi is viewed as an aspirational destination, there is substantial agreement among the 100k Canadian average traveler and a notable level of agreement among long-distance and older Canadian travelers as well. The deck also includes material for Australia, though that content isn't summarized here. The section ends by noting that the Japanese team has selected the average traveler profiles that emphasize safety and security as central to traveler expectations, and these insights inform market tailoring and messaging. If needed, the fuller traveler profile deck and related materials are available in the HTA packet and on the HTA website.

Co-Vice Chair Agas thanked Ms. Chun for the great data.

Mr. Uchiyama discussed Ms. Chun's points regarding the Mexico market, noting that hotels are beginning to receive inquiries about Mexico, though the duration of this elevated interest remains uncertain. He then shifted to the CEO report, specifically page 11, which presents the backlog of business in the convention center. He observed that historically the cycle for citywide convention business has spanned five, seven, and ten years, but that in the aftermath of COVID, it appears to have shortened to three, five, and seven years. The current Mexico situation; however, is viewed as creating an additional opportunity within citywide convention business. Mr. Uchiyama expressed concern that the existing backlog may reflect past experiences with the facility and the uncertainty surrounding whether the convention center project would be completed. He relayed Ms. Garcia's reassurance that the project is on track and anticipated to perform better than before. Nevertheless, he emphasized the importance of focusing on 2028 and 2029 to ensure that, once the convention center comes back online, it is fully utilized. He underscored the need for strong support for the sales teams and for collaboration with the Hawaiʻi Convention Center (HCC) to promote the venue, describing this as top-of-mind.

There were no further questions or comments.

8. Report by the Strategic Plan Permitted Interaction Group

Member Fischer commended Ms. Anderson and her staff for delivering a solid foundation for the plan in collaboration with the contracting team, noting that the committee could refine and massage the plan to enhance its impact and clarity. He previewed that Ms. Anderson would provide additional detail and outlined the planned protocol for reviewing the plan. Specifically, Mr. Anderson would deliver a PowerPoint presentation on the plan, after which it would be presented to all Board members later in the week. Following that presentation, board members would have an opportunity to review the plan on their own, culminating in a special board meeting where discussions would take place. For today, the agenda centers on a high-level presentation with no in-depth discussion, reserving substantive discussion for a later date. The committee has met over the past four Fridays, affirming the HTA's current mission statement and continuing into the next Strategic Plan. The mission statement emphasizes strategically managing Hawaii's tourism in a sustainable manner aligned with economic goals, cultural values, preservation of natural resources, community desires, and visitor industry needs.

The committee's strategic focus centers on three pillars: brand marketing, experience development, and tourism leadership. In brief terms, under brand marketing, the aim is to grow the economic value of Hawaii's tourism without overburdening island capacity, as measured by metrics such as visitor spending growth relative to visitor volume, visitor message recall, return on ad spend, brand strength, and distribution across shoulder seasons and islands. Experience development is defined as ensuring tourism delivers more economic benefits to Hawaii's residents by connecting visitors with uniquely Hawaiian experiences, local arts, culture, and products, as measured by visitor-resident satisfaction. Across the four initial sessions, the group progressed from introducing the chair and vice chair, and recapping the plan development process, to reviewing guiding principles and the pillars, with a focus on shoulder seasons across the pillars. In the second session, guiding principles were reviewed alongside the three pillars, with longer discussions about experience development and tourism leadership focusing on community benefits, the Destination Management Action Plan (DMAP), and the streamlining of strategies and tactics. The third session covered streamlined strategies and tactics for each pillar, the consideration of key performance indicators (KPIs) for each pillar, and how HTA activities contribute to these KPIs. The fourth session finalized the brand marketing and visitor experiences KPIs and additional measures, added film tourism to visitor experiences, discussed illegal and legal short-term rentals and how they should fit into the Strategic Plan, and explored opportunities for further collaboration with the University of Hawaii's School of Travel Industry Management, including workforce development. Ms. Anderson noted that all of this content would be covered in the upcoming PowerPoint.

The three pillars are supported by detailed strategies and tactics guiding day-to-day HTA activities. Under brand marketing, strategies include identifying and expanding marketing outreach to attract higher-spending, higher-value traveler segments; energizing the Hawaiʻi brand; strengthening Hawaii's competitiveness for meetings, conventions, and incentives (MCI travel); identifying optimal distribution channels and high-value traveler segments for each island; and educating and engaging all visitors to travel responsibly in Hawaiʻi. For experience development, strategies include establishing an HTA experience development program; supporting the enhancement of major attractions and experiences to improve Hawaii's competitiveness for high-value visitors and major events; strengthening pathways for local entrepreneurs, creators, and producers to participate in the tourism economy; advancing understanding and preservation of Hawaiian culture; and maintaining a data-driven destination management approach while continuing to support Hawaii's sustainability goals. For tourism leadership, strategies focus on clarifying and strengthening HCA's role as a leader in Hawaiʻi tourism; formalizing integrity partnerships; strengthening island-based collaboration; proactively communicating and supporting workforce development; building long-term resilience of the tourism economy; and strengthening Hawaii's convention center as an economic hub.

Ms. Anderson opened by acknowledging the ongoing work of the Strategic Plan Permitted Interaction Group and thanking Ms. Orton as Chair, Danny Ojiri as Vice Chair, Co-Vice Chairs Kimberly Agas, and the members Guy, Wong, and Elmore. She expressed appreciation for the staff's guidance over the past weeks and framed the effort as a return to basics: building demand while ensuring an exceptional visitor experience and translating these efforts into economic benefits for residents, improved quality of life, and a thriving visitor industry. She reviewed the slide previously covered by Ms. Orton and reiterated the mission: to strategically manage Hawaiʻi tourism in a sustainable manner aligned with economic goals, cultural values, preservation of natural resources, community desires, and visitor industry needs. The proposed vision for 2030, Hawaiʻi thriving through collective actions to grow economic vitality, strengthen collaborations, and fulfill the shared Kuleana to build a visitor economy where people, place, and culture prosper together, was highlighted and anchored in guiding principles drawn from the original Kikumu Strategic Plan, including Hoʻokipa, Mālama 'Āina, aloha, Lōkahi, Pūlama i ka hoʻoilina, Aloha 'Āina, Alakaʻi, Hoʻoulu, Hoʻokahua, Palekana, and He kulana i mahaloʻia. She emphasized that the pillars and strategies would drive the plan forward, with tactics to be detailed in the forthcoming draft.

Ms. Anderson reaffirmed the three pillars for the HTA Strategic Plan: brand marketing, experience development, and tourism leadership. Brand marketing aims to differentiate Hawaiʻi through branding that reflects its unique culture, local values, and responsible community engagement, while driving economic vitality and ensuring targeted, high-value visitor segments with measurable returns on investment. Experience development focuses on community-first, sustainable, and regenerative visitor experiences that revitalize communities, create economic opportunities, and meet the interests of high-value visitors, with outcomes measured by visitor satisfaction. Tourism leadership seeks to regain confidence among the legislature, industry, and community by leading tourism and partnering with state agencies, counties, the visitor industry, and community partners to build a resilient visitor economy, while promoting clear, collaborative communication to residents and visitors alike. She clarified that the slide presented the pillars and strategies, with tactics to be appended in the Strategic Plan draft to show how staff will implement the plan over the next five years. Ms. Orton had already covered the strategies; Ms. Anderson noted that the next version would include detailed tactics under each strategy.

She then enumerated the high-level key performance indicators associated with the plan: average daily visitor spending, total visitor expenditures, visitor satisfaction, and resident sentiment. These KPIs would be tracked in collaboration with Ms. Chun and the Tourism Research Branch to ensure reliable data from surveys. Under each pillar, high-level KPIs were outlined. For Brand Marketing, the indicators include average daily visitor spend, growth in visitor expenditures—specifically, growth in expenditures expected to outpace growth in visitor arrivals—plus metrics such as return on advertising spend, brand strength (intended travel), visitor message recall, and shoulder-season distribution across islands. For Experience Development, the focus is on visitor satisfaction—specifically exceeding expectations in major market areas—and resident sentiment, measured by perceptions of tourism benefits and local impacts, and again average daily spending. For Tourism Leadership, the KPIs include resident sentiment, tourism's positive effects on families, partner satisfaction with HTA collaborations, and evidence of increased funding as signals of trust with the legislature.

Ms. Anderson indicated that additional measures would appear in the draft Strategic Plan to be shared the following day, emphasizing a commitment to accountability, with clear outcomes and outputs, and to improved communication with Board members, the public, and legislators. She thanked the Strategic Planning Permitted Interaction Group, along with Better Destinations, Cathy Ritter, and her team, for their contributions. She reminded attendees that the plan is data-driven, incorporating input from interviews conducted by Ms. Ritter with Board members, key legislators, government officials, visitor industry leaders, and community leaders, as well as a public survey and community webinars conducted in the latter part of 2025. The results and feedback were used to draft the plan, which was reviewed by the HTA staff to ensure alignment with the desired direction and available resources. The process was described as a collaborative effort, with the Permitted Interaction Group refining and steering the plan.

Ms. Anderson outlined the next steps: the Board would receive the draft Strategic Plan for review, followed by a Special Board meeting in the second week of March to discuss the plan, with the aim of Board approval so it could move to the director and governor for final approvals and then proceed to implementation. She concluded by reiterating gratitude to the group and all contributors for their time and effort, particularly noting the Friday afternoon sessions over the past four weeks and the input gathered through interviews, surveys, community hearings, and webinars.

Co-Vice Chair Agas thanked everyone for their great, hard work.

Co-Vice Chair McCully asked whether the meeting she was proposing would be around Tourism Day and whether it would be an in-person meeting.

Ms. Anderson asked what the Co-Vice Chairs would like to do. Co-Vice Chair McCully said it would be helpful for some people from neighbor islands who come in for the meeting and then stay over for Tourism Day. And it would be a way for people to walk the aisles, see their local legislators, and interact as representatives of the HTA.

Ms. Anderson agreed.

Co-Vice Chair McCully asked about the Strategic Plan. He asked if it was the contract they gave to Ms. Ritter to follow up on the governance study.
Ms. Anderson said that was correct, and it was a competitive process, and her company was selected to help them with the Strategic Plan. She said she would be distributing the draft of this the following day.

Co-Vice Chair McCully asked what the result was from Ms. Ritter's contract. Ms. Anderson said it was to help them develop their 2026 through 2030, and she would distribute it the following day.

Co-Vice Chair McCully, offered guidance on how to approach the governance work and the Strategic Plan moving forward. He referenced the original governance study report—the case for reinventing Hawaiʻi tourism oversight—produced by Ms. Ritter's group, noting that while it isn't homework, it can serve as a valuable source document or baseline for the Advisory Board to become familiar with. He then shifted to the practical purpose of the Strategic Plan, acknowledging the committee's progress and noting that those who have served on the Board and participated in the governance study are familiar with the pillars discussed today. He emphasized that a key role of the Advisory Board now is to help staff focus on accomplishable, tangible, achievable actions that can yield measurable results. In this context, he urged the group to identify KPIs as the core reporting mechanism, given that the existing list of strategies is extensive and may be difficult to implement all at once. His suggestion was to consider which items represent "low-hanging fruit"—those that can be realistically achieved in the near term and demonstrate clear, reportable improvements through the KPIs. He proposed that the Board's role could include recommending to staff a prioritized focus based on their collective experience in the communities, ensuring that efforts align with what is feasible and impactful. In sum, he stressed the value of using KPIs to guide governance focus, determine which strategic initiatives to pursue first, and leverage the Board's market and community experience to inform prioritization and resource allocation.

Member Guy echoed the appreciation of the staff and team.

9. Report by the Administrative Standing Committee on their Meeting Held on February 25, 2026

a. Discussion and/or Approval of the Job Description of the HTA President and CEO

Co-Vice Chair McCully said the Committee is advising the General Board that what they have is a significantly different job description and benefits package, and that when the CEO Permitted Interaction Group meets to continue the CEO they will take that into consideration.

Co-Vice Chair McCully made a motion to move. Member Guy seconded. The motion passed unanimously.

b. Discussion and/or Approval of the Bylaws of the Hawaii Tourism Authority

Co-Vice Chair McCully opened with a housekeeping note, acknowledging a correction made by Mr. Uchiyama. He referenced language changes regarding the Film Tourism Committee, noting that Section 6 needed adjustment. Member Ojiri confirmed the specific edits: renaming the committee from the Film Production Tourism Committee to the Film Tourism Committee, and modifying the committee mission statement guidelines to reflect initiatives that promote Hawaiʻi through film, television, and integrated marketing; these initiatives should support economic development and authentic representation of the state, and the mission should commit to guiding and supporting initiatives that promote Hawaiʻi as a film tourism destination through film, television, and integrated marketing, fostering economic development while ensuring authentic representation of the state. Co-Vice Chair McCully characterized the changes as minor corrections and encouraged all standing committees to review their own mission statements or wording for accuracy. He thanked the participants for their efforts, specifically acknowledging the Film Tourism Committee, and concluded by noting that the adjustments would be implemented going forward.

Co-Vice Chair McCully made a motion, and it was seconded by Member Elmore. The motion passed unanimously.

10. Report by the Film Production Tourism Committee on their Meeting Held on February 19, 2026

Member Elmore provided a concise, high-level recap of the committee's recent activities, noting that minutes will capture the full detail. She began by confirming that the group reviewed and adjusted the mission and the corresponding title to ensure alignment with the updated mission, describing these as minor edits. She highlighted a discussion with Karen Ewald from the State Foundation for Culture and the Arts about the Hawaiʻi Film and TV Pop Up Museum. Karen Ewald, the Executive Director of the State Foundation on Culture and the Arts, shared logistical aspects of the plan, including that an installation typically requires three to four weeks to deploy; however, due to scheduling and other Capitol Modern commitments, the pop-up is unlikely to occur before 2027. A positive takeaway was that costs are not expected to be excessive, and that tasks related to creating, shipping, and installation would be handled by the State Foundation, given their expertise.

Member Elmore then turned to HIFA, the Hawaiʻi International Film Association, and summarized a robust presentation from George Russell, the association's Assistant Director. She urged Board members to review the minutes once released, noting that Russell's PowerPoint would be included. The history and context of HIFA were summarized: HIFA began in 1987 as a nonprofit comprised of bilingual location coordinators and production managers. Member Elmore referenced historical production expenditures, citing $8 million in 2015, peaking at $12 million in 2017, and $9 million in 2019, illustrating the economic impact of film productions connected to Hawaiʻi. She emphasized that this activity is not funded by the HTA or the state but represents "free advertising" for Hawaiʻi, with visible placements in Japanese subway stations and taxis at no cost to the state, while recognizing the substantial outlay by Japanese advertisers.

Labor representatives also contributed, underscoring the program's importance to workers. Tui Scanlan from IATSE, the international trustee, spoke on behalf of the behind-the-scenes workforce in film and TV, noting that meaningful wages support workers' professional development and skill enhancement, particularly on productions involving Japan and Korea. Member Elmore acknowledged the value of the Haifa and labor perspectives and thanked HIFA's George Russell for their informative presentation.

She mentioned that administrative items were not repeated since they had been covered previously, and she noted the postponement of the discussion on the RFP feasibility and related DBEDT's Creative Industries Division (CID) director Georja Skinner's absence, planning to revisit these topics at the April meeting. Concluding, Member Elmore invited questions from the Board, staff, or attendees and signaled that further details would be contained in the forthcoming minutes. If desired, the minutes could be formatted with standardized headers, include attendee names, timestamps, and extract any actionable items or owners for follow-up.

Co-Vice Chair Agas thanked Member Elmore.

There were no questions online or public testimony.

11. Discussion and/or Action on Revisions to the Standing Committee Charters

Mr. Uchiyama reported that this agenda item was covered in section 9B.

12. Review and Discussion on Current Legislative Bills

Ms. Radke welcomed everyone to Tab 12 and acknowledged the return of Member West. She signaled that she would report on what has been done and invite input from the rest of the group throughout, pausing to address questions as they arise. She began by recounting the process they had used to review the 70 bills the committee initially faced. Since the last meeting, the legislature has pared many of those bills down, and the team has documented which bills the HTA supports, opposes, or comments on and monitors. She noted that testimony for upcoming hearings must typically be submitted within about 48 hours of notice, with the usual cycle starting when notices arrive on Friday, followed by staff discussions that reference prior HTA testimony, the relevant resolution numbers, and the Board's guidance. The process involves evaluating operational considerations with Ms. Anderson present in the meetings, then coordinating with DBEDT to determine the HTA's formal position—opposed, supported, or commented—and drafting the testimony. Both Ms. Anderson and Mr. Uchiyama sign off on the drafts before they are submitted to DBEDT for review and approval by the director. The final testimonies are then circulated to the Board to provide adequate opportunity for review, though Ms. Radke acknowledged that the tight timeline is not ideal.

Ms. Radke then opened the floor to questions about the process before moving on to discuss the bills the HTA has supported. She explained that support generally aligns with bills that are part of the administration's package, bills that restore procurement exemptions or funding, and those closely aligned with the HTA's mission, Strategic Plan, and legislative responsibilities. Regarding bills the HTA opposes, she noted that there are three such items, all of which seek to dissolve the HTA either in full or in part and are inconsistent with Hawai'i Revised Statutes (HRS) 201B; the HTA has submitted testimony in opposition. She clarified that these three bills have been deferred, meaning the committee decided not to hear them, effectively rendering them dead. Ms. Radke offered to discuss these three bills further if anyone wished to delve into their specifics.

Turning to the bills HTA supports, she highlighted several notable items. Two measures that promote film marketing and promotion—HB1590 and a related item on the list—are moving through the process, with hearings occurred currently. Additionally, HB62602 HD2 would create a DBEDT Sustainable Tourism Infrastructure Matching Grant Program for one-time capital projects tied to measurable sustainability and climate resilience; the HTA views this as closely aligned with its mission and Strategic Plan and therefore has supported it. She also mentioned two sports-related bills generating particular enthusiasm: one is a study to assess the benefits and costs of sports tourism, which is queued for the third reading on March 5, and SB2627, which aims to restore the HTA's procurement exemption for sports marketing contracts, another measure the director, Louis Vu, has expressed support for.

In contrast, she summarized the three opposition items as attempts to dissolve the HTA in full or in part, noting these are inconsistent with the state's governing statutes and have been deferred. She did not go into detail on those three during this briefing, but invited questions if anyone wished to discuss their specifics. Concluding, Ms. Radke reminded attendees that the discussion would continue with questions and that the Board would receive the testimonies as they are submitted to the legislature, recognizing the tight timelines involved. She invited questions about the process, the specific bills, or the status of those actions, and she offered to provide deeper detail on any item upon request.

Co-Vice chair McCully asked if the position is established through the executive committee working with DBEDT director.

Ms. Anderson said that is guided by the resolution that the Board passed last month.

Co-Vice Chair McCully underscored a key governance point: while the resolution expresses broad principles, the actual positions on specific bills require careful, bill-by-bill review to determine alignment with the HTA's goals. He distinguished between existential bills that threaten the HTA's existence, bills that are simply deferred, and bills like SB2906, which are moving forward in SD1 and appear to have support in both houses but would substantially amend the HTA. He explained that SB2906 seeks to establish a tourism liaison officer within the governor's cabinet, with the goal of transferring destination management and stewardship responsibilities from the HTA and its Advisory Board to the tourism liaison office, thereby placing branding as the HTA's singular focus going forward. Ms. Radke concurred, clarifying that the difference between SB2906 and an existential dissolution bill lies in the absence of dissolution; SB 2906 would not dismantle the HTA but would reallocate functions and alter governance. She noted that because SB2906 does not dissolve the HTA, the committee considered it differently—viewing it as a bill that could require a nuanced commentary or targeted positions rather than outright opposition.

Co-Vice Chair McCully opened by informing the Board that he had offered comments on SB2906 during the committee hearing, noting he happened to be there for another reason and decided to provide his input. He urged all members to access the legislative website, obtain a copy of SB2906 if they do not already have one, and follow its progress, as it appears to be moving forward. Ms. Radke responded that SB2906 is now in SD1 and has been referred onward; she anticipated additional hearings but noted there have been substantial changes since it first appeared. She opened the floor to questions, inviting Member Guy to weigh in, though Member Guy indicated he could not see the testimony. Co-Vice Chair McCully clarified that he attended for another purpose and provided verbal comments, explaining that SB2906 could become an omnibus bill with language that could be broadened or contracted, and could potentially be deferred. He warned that the bill's title is broad, covering tourism, and suggested it could encompass a wide range of provisions, possibly serving as the HTA's vehicle in the 2029 or 2026 session, depending on how it evolves.

Ms. Radke then circled back to confirm whether there were additional comments on the previously opposed bills (numbers 47, 1944, or 2807). With no further comments, she announced a shift to commenting and monitoring. She explained that this category includes bills that touch the HTA, its responsibilities, or related areas such as tourism administration and cruise shipping. She emphasized the importance of discussing these bills in more depth with the team to gauge positions. She proceeded to highlight a couple of quick items, starting with HB1623, which concerns the HTA's participation versus via our CEO. They filed comments to address an administrative issue, and otherwise, the committee appeared largely aligned on this bill.

She signaled that there would be additional discussion on the remaining bills under the commentary and monitoring category in subsequent deliberations.

Ms. Radke began by flagging HB1800 and HB2500 as upcoming budget-related bills that would be taken up in the near term. The committee will submit testimony on these budget items as they pertain to the HTA's responsibilities. HB1950 was discussed as a notably interesting case. The staff considered supporting it, but the HTA chose to file a comment rather than support it. The bill would establish a state-led marketing and branding special fund using a share of the transient accommodations tax (TAT), with the proposal showing that a percentage of TAT allocations would return to support tourism. The issue, as the HTA saw it, was that the bill would create an additional special fund on top of the existing Tourism Special Fund, which raised concerns about duplicative funding mechanisms. The committee noted that the draft included a 15% allocation, which the HTA had not requested, so the current language was blanked out for the moment. The HTA remains supportive of the concept in principle, provided the language is clarified so that allocations are based on a defined percentage of TAT rather than a fixed amount. Ms. Radke indicated that they hope the language will be reintroduced for further discussion. The overarching rationale remains that allocating a percentage of TAT has historically been an effective mechanism for funding marketing and balancing the tourism budget.

Co-Vice Chair Agas sought to clarify whether the fund would require the DBEDT to submit an annual marketing and branding tourism management plan, versus the HTA's current approach to determining marketing dollars and island-focused priorities. Ms. Radke clarified that the proposed plan language in the bill did not appear to be substantially different from the HTA's current operations. However, she acknowledged that the language needs alignment. Member Ojiri explained that historically, the HTA did receive a percentage of TAT; under the bill's current drafting, the HTA would instead be assigned a total amount, which would revert to a percentage draw if the bill's final language returns to that structure. He noted that the original 15% figure, if applied to today's TAT collections, would translate to roughly $121 million in spending—an amount the HTA favored, but the bill's direct percentage was currently removed or blanked out. He reiterated that the intent is to create dedicated funding so the HTA can plan longer-term and deliver sustainable marketing across markets, with supplemental increases allocated based on plan use.

Ms. Radke noted that SB2906 would not dissolve the HTA, but would reorganize responsibilities by transferring destination management and stewardship from the HTA and the Advisory Boar to a Tourism Liaison Office, potentially making branding the sole focus for the HTA going forward. She contrasted SB2906 with the existential dissolution bills, explaining that since SB2906 retains the HTA's existence in some form, the committee's stance would be more nuanced—potentially comments rather than outright opposition, depending on strategic fit and timing. The discussion then touched on whether the committee would be comfortable with a multi-year budgeting approach should the funding mechanism be established, allowing the HTA to plan further ahead for contracts and market initiatives.

The conversation then shifted to HB2403 and SB3267, which propose reducing the HTA Advisory Board from 12 to seven members and restricting appointments to lists from specified tourism industry organizations. Co-Vice Chair McCully expressed concern that seven industry-only appointees would be unlikely to survive in the context of typical state boards, which usually include non-public-facing members. Ms. Radke noted that the bill had not yet come up for hearing but should be reviewed if it does. Member Ojiri provided context that the bill would require industry-based appointments and implied a risk of overly industry-centric governance. The group then discussed SB2131, which ties available HTA funding to the Tourism Functional Plan, and HB2483 (similar to HB1623), noting that both relate to functional planning and CEO designee considerations. SB2906 had already been mentioned in the broader governance discussion.

The Boar then touched on SB3332 SD1, which was originally heard and later deferred; it is scheduled for a hearing on March 3. There was also a bill to impose a moratorium on state-funded travel by certain agencies through June 30, 2028, prompted by concerns raised in Civil Beat regarding the Department of Education's travel reporting. HB1529 would reduce quorum requirements, but Ms. Radke indicated there would be no immediate comment on that. The committee also discussed HCC-related bills HB1609 and SB2074 regarding naming rights for stadiums and convention centers, both of which had been deferred as of the meeting. The cruise bills under consideration included SB634 (carried over) and the pair HB2195 and SB2698, which would establish a per-passenger head fee to fund a cruise ship special fund for harbor infrastructure improvements, with retroactive repeal provisions and alignment with DOT's energy security goals for 2030. The cruise industry advocates favored the per-head fee because it targets the passenger portion of cruise rates rather than the full room rate included in the

TAT, arguing it more fairly distributes costs. The committee acknowledged the potential economic impact on tourism-related businesses and the broader implications for Hawaii's tourism strategy.

Member Fischer shared a personal perspective, noting that he submitted written and virtual testimony on the cruise-related bills. He reflected on the historical context of Act 96, acknowledging the tense discussions in earlier stages and the cruise industry's reliance on certain carriers and the broader tourism ecosystem. He described the Pride of America and related stakeholders as essential to Hawaii's economy and noted concerns about potential adverse effects if cruise ships were discouraged or removed. Fischer emphasized that the current approach—allocating TAT as a percentage rather than the entire fare—aligns with fair distribution of marketing costs and benefits. He expressed satisfaction with the direction of the bills and the industry's cautious optimism, alongside ongoing discussions with industry lobbyists and government officials, including the governor.

Next steps: The conversation suggested continuing review of the budget bills (HB1800, HB2500) and the HTA-related measures; a continued emphasis on SB2906 and how its governance implications affect the HTA's role and funding; further analysis of SB2131, HB2483, and other related measures; and ongoing engagement with the cruise-related bills to monitor potential impacts and industry feedback.

Ms. Radke kicked off by guiding the Board through upcoming budget-related bills and the HTA's approach to testifying. HB1800 and HB2500 were highlighted as budget bills that would be addressed in the near term, with the HTA planning to submit testimony on those items as they pertain to the HTA's responsibilities. HB1950 was discussed as particularly noteworthy: HTA considered supporting it but ultimately filed testimony as a comment rather than full support. The bill intends to establish a state-led marketing and branding special fund using a share of the transient accommodations tax (TAT). While the HTA supports the general concept of directing a portion of TAT to marketing, the draft proposed a separate special fund in addition to the existing tourism funding, which the HTA found problematic. The draft reportedly included an assumed 15% allocation that the HTA did not request, so the number was blanked out for now. HTA remains supportive in principle, provided the language is corrected to ensure allocations are made via a defined percentage of TAT, not a fixed amount. There is a hope that the language will reappear for further discussion.

Co-Vice Chair Agas sought clarification about how expenditures would be allocated, distinguishing between whether annual marketing dollars would be guided by a DBEDT plan or by the HTA's current approach to marketing by island and priorities. Ms. Radke indicated that the bill's plan language did not appear to be substantially different from the HTA's current practice, though alignment is needed. Member Ojiri reminded the group that the HTA historically received a percentage of TAT; under the bill's current drafting, the HTA would be assigned a total amount, potentially reverting to a percentage draw depending on final language. He noted that the original 15% figure would translate to roughly $121 million in spending under current TAT collections, which the HTA favored, but the explicit percentage was removed. The aim, per Member Ojiri, is to create dedicated funding to enable long-range planning and sustained marketing across markets, with supplemental increases allocated based on strategic plans.

Ms. Radke noted that SB2906 would not dissolve the HTA but would transfer destination management and stewardship responsibilities to a Tourism Liaison Office, potentially making branding the HTA's sole focus going forward. She contrasted SB2906 with existential dissolution bills, explaining that SB2906's retention of the HTA means the committee may respond with comments rather than outright opposition, depending on timing and strategic fit. The discussion then touched on whether the funding mechanism could support multi-year budgeting, enabling the HTA to plan contracts and market initiatives further ahead.

The conversation then moved to several other bills. HB2403 and SB3267 were discussed; these would reduce the HTA Advisory Board from 12 to seven members, with appointments restricted to lists from specific tourism industry organizations. Co-Vice Chair McCully expressed concerns that seven industry-only appointees would be unlikely to withstand the broader expectations for state boards, which typically include non-industry perspectives. Ms. Radke acknowledged the bill had not yet been heard, but should be reviewed if it comes up. Member Ojiri provided context that the bill's design would center on industry-based appointments, underscoring risks to the breadth of governance.

The discussion then covered SB2131, which ties HTA funding to the Tourism Functional Plan, and HB2483, which is similar to HB1623; both were flagged for consideration, with SB2906 having already been addressed earlier in the session. SB3332 SD1 had been scheduled to be heard on March 3 after being deferred earlier. A separate item proposed a moratorium on state-funded travel by certain agencies through June 30, 2028, prompted by concerns raised in Civil Beat regarding the Department of Education's travel reporting. HB1529 would reduce quorum requirements; Ms. Radke indicated no immediate comment on that bill. For stadium and convention center matters, HCC-related bills HB1609 and SB2074 had been deferred as of the meeting. The cruise-related bills included SB634 (carried over from last session) and HB2195/SB2698, which propose a per-passenger head fee to fund a cruise ship special fund for harbor infrastructure improvements, with a retroactive repeal provision. The cruise industry prefers the per-head approach because it targets the passenger portion rather than the entire fare, aligning with DOT's energy security goals for 2030. Member Fischer added a personal perspective, noting he submitted written and virtual testimony. He described the cruise bill's trajectory as a potential “exit” from tense debates into a more balanced approach that protects the cruise industry and local economies, acknowledging prior negotiations and the broader stakeholder landscape.

Next steps and housekeeping notes:

- Continue monitoring HB1800, HB2500 (budget-related), and HB1950 (subject to language fixes).
- Track SB2906’s progress and its governance implications for the HTA; determine whether to provide comments or support, depending on how the bill evolves.
- Monitor SB2131, HB2483, and related measures that tie the HTA funding to planning or organizational changes; prepare targeted positions as needed.
- Monitor the cruise-related bills (HB2195, SB2698, SB634) and the per-passenger head fee concept, including industry reactions and potential infrastructure outcomes.
- Continue evaluating the TAT discussion, ensuring any proposed changes preserve a clear nexus to the visitor industry and TAT’s role in marketing and destination management.
- The Board will review testimony drafts and maintain alignment with the resolution, prioritizing direct nexus to visitor experience and economic impacts.

There were no questions from online participants. Co-Vice Chair Agas thanked Ms. Radke’s presentation and being the resource for the Board members.

13. Presentation and Discussion on the HTA and Hawaiʻi Convention Center Fiscal Year 2027 Budget Request***

The Board proceeded into Executive Session pursuant to HRS §92-5(a), which requires certain confidential information and the HTA's own exception about protecting Hawaii's competitive edge in tourism.

14. Adjournment

AG Cole reported that there was a presentation and a lengthy discussion on the HCC budget for Fiscal Year 2027, but no vote was taken. There were no comments from the public.

Co-Vice Chair Agas adjourned the meeting at 2:13 p.m.

Respectfully submitted,

Sheillane Reyes

____

Sheillane Reyes
Recorder

5
CEO Report

CEO MONTHLY REPORT
MARCH 2026

This March report highlights the Hawaiʻi Tourism Authority's (HTA) activities and actions taken by the staff from February 16 through March 15, 2026, in support of the organization's overall mission, its 5-year strategic plan, and its annual strategic tourism management plan.

EXECUTIVE SUMMARY

- **Legislative Engagement** – HTA submitted written and oral testimony on 2026 bills. Leadership continues to engage directly with legislators and responds to requests.
- **Administrative Updates** – HTA is evaluating transition back to calendar year budgeting to align with brand marketing cycles.
- **Hawaiʻi Convention Center Rooftop Terrace Deck Repair Project** – Project continues to advance and remains on schedule. Project budget remains stable. Two major rain events in February and one in March were managed with 24/7 onsite supervision. Construction progress continues on Levels 3 and 4 (demolition and utilities).
- **Emergency Preparedness** – Active participation with HIEMA emergency preparedness and response. Involved in emergency management during the March Kona Low Storm event and ongoing damage assessment documentation. Collecting agricultural sector damage estimates for federal/state funding. Finalizing updated continuity and departmental plans.
- **HTA Public Affairs** – February metrics: 147 media mentions; 26 placed stories; estimated 79M exposures; $276k publicity value
- **Community Programs** – Supported 30 cultural and enrichment projects statewide from Feb-March, including festivals, hula shows, and conservation workdays.
- **Destination App** – Integrated DBEDT tourism survey with GoHawaii app; 63,247 responses since Dec 24 (avg 771/day); 17,314 marketing options
- **Sports Partnerships** – Sony Open 2026: 16,162 out-of-state visitors; slight decrease from Japan offset by U.S. increase; $53.7M economic impact
- **Global Marketing** – Preparing next RFP cycle, supplemental contracts, and major industry events. Monitoring global uncertainties (Mexico, Iran, oil prices) affecting long-term travel performance.
    - <u>Market Area Highlights</u>
        - USA: 11.4M impressions from Advanced TV/OTT; 58.2M impressions from social/digital; strong campaign momentum.
        - Canada: "Hawaiʻi Stays With You" activation across billboards, Olympics broadcasts, and travel trade.

        - Oceania: Strong presence at Flight Centre Expo and Brand USA events across Australia and New Zealand.
        - Japan: Yappari Hawaiʻi and Beautiful Hawaiʻi campaigns generating over 3.5M impressions; successful media webinar.
        - Korea: Multiple OTA and airline partnerships delivering significant YoY growth; new spending incentives with VISA/Shinhan.
        - Europe: British Museum exhibition ongoing; new ʻŌlelo Hawaiʻi campaign launching.
        - China: Trip.com and Prince Waikīkī promotion with value-added packages.
        - Taiwan: NCL partnership promoting new fly cruise itinerary.
    - <u>Cruise Industry</u>
        - Princess Cruises conducted statewide port visits to strengthen partnerships. Holland America announced 2027–28 Hawaiʻi sailings with expanded itineraries.
    - <u>Meet Hawaiʻi</u>
        - February generated three long lead citywide convention leads for 2032–2035 (30,466 room nights).
        - Pipeline includes nine high probability opportunities valued at ~$280M economic impact.
- **Draft Destination Management Action Plans** – 2026 public comment closed March 2; over 150 comments received. Island-specific webinars reached 300+; final draft expected mid-March with approvals through late March–April.
- **Draft HTA Strategic Plan** – HTA's 2026–2030 Strategic Plan approved by Advisory Board; pending DBEDT Director and Governor approval
- **Save the Dates!** HTA's Spring Tourism Update will take place on April 1 at Limeline Hawaiʻi and Tourism Day at the Capitol has been rescheduled to April 10. Staff has been preparing for these two events.

At the time this report was prepared, the latest visitor statistics available were for January 2026. Our KPIs are total visitor spending and per-person-per-day spending, and each has shown an increase compared to January 2025:

- Total Visitor Spending: $2.25 billion, compared to $1.89 billion in year-to-date January 2025 (+19.1%).
- Total Per Person Per Day Spending: $277.8, compared to $249.9 in year-to-date January 2025 (+11.2%).
- State Tax Revenue (direct, indirect, and induced): $315.7 million, compared to $265.4 million in January 2025 (+19.0%).

I. OFFICE OF THE CEO

Staffing

Of HTA's 30 approved positions, two are temporarily assigned, and five are vacant.

Position	Status
CEO & President	Caroline Anderson is Interim. The CEO Search Permitted Interaction Group and Chief Administrative Officer are working on filling the position.
Chief Brand Officer (CBO)	Jadie Goo is Acting CBO. Paperwork has been signed off, and HTA will advertise in March.
Chief Stewardship Officer	Vacant. Paperwork is awaiting DBEDT approval.
Budget & Finance Officer	Vacant. Position is being redescribed.
Administrative Assistant	Vacant. Processing candidate’s background and reference checks.
Contracts & Administrative Manager	Vacant. In active recruitment.
Brand Manager	Vacant. Position is being redescribed.

HTA’s VP of Finance, Chief Administrative Officer (CAO), along with the HTA’s Executive Assistant and Interim President & CEO, are actively involved in updating job descriptions and submitting documentation to DBEDT to fill vacant positions.

Administrative

Staff has identified the need to transition the HTA back to a calendar budget cycle in alignment with its brand marketing contractors, which will better match hospitality industry standards. The preferred solution is to revert to dedicated funding based on a percentage of the Transient Accommodations Tax (TAT). However, if this cannot be accomplished during the current legislative session, staff is considering allocating funding for marketing contracts over a 16 to 18-month period using fiscal year 2027 funds. This approach would align with the state’s budget processing timeline.

The fiscal year budget begins on July 1, with funds distributed by the Department of Budget and Finance to all state departments around September. This plan would extend the HTA’s fiscal year 2027 budget for brand marketing activities until December 2027. It would also create an overlap in funding, providing a safeguard against a potential 2 to 3-month funding gap.

Current market conditions are very volatile with conflicts in the Middle East and in Mexico. Already challenged international exchange rates are feeling the effects of the rise of oil cost; some international carriers already introducing fuel surcharges will have an additional impact on air service to the islands.

Legislative Update

HTA provided both written and oral testimony on bills relating to the HTA or Hawaiʻi's visitor industry. See tab 6 in the board book for the update on the 2026 bills. The Interim President & CEO, CAO, and VP of Finance continue to meet with legislators regarding HTA's program and to respond to legislative requests.

Emergency Management and Crisis Coordination

HTA continues to actively support Hawaiʻi Emergency Management Agency's preparedness exercises, serving as a communications link to assist Hawaiʻi's visitor industry and visitors during times of crisis. HTA engaged in several emergency preparedness and response activities.

We were actively involved with the past incident (Kona Low) and are now involved with damage assessment documentation. David is now the Emergency Management Officer, so he is engaged with both HTA and DBEDT responses to HIEMA.

We are currently collecting damage estimates from agriculture-related organizations to submit for federal and state funding. Also, all updated continuity and departmental plans for HIEMA are being finalized.

Operational Focus Area

HTA continues to work with the Department of Business, Economic Development & Tourism's (DBEDT) Director's Office and Administrative Services Office to identify solutions and improve efficiencies with HTA's procurements.

Stakeholder Outreach and Engagement

Director Tokioka, Board Member Ojiri, Interim President & CEO along with CAO met with Japan Airlines to discuss their re-entry into Kona and market conditions. Before March 2027, JAL indicated that Boeing has fallen in their deliveries to Japan Airlines and therefore re-entry into the Kona market is due to available aircraft.

Public Affairs

Media

Media Releases in February

Feb. 3: Hawaiʻi Tourism Authority to Share Draft Destination Management Action Plans Developed by Each Island This Month

Key Performance Indicator	February Results
Media Mentions (total)	147
Placed media (media mentions based on media releases, pitches, or public affairs contacts)	26
Media Releases	1
Estimated Audience/Exposures	79,222,730
Estimated Publicity Value (USD)	$276,371

The Interim President & CEO provided welcome remarks at the Honolulu Festival's Press Conference on March 6, 2026.

- www.staradvertiser.com/2026/03/09/hawaii-news/honolulu-festival-celebrates-cultural-exchange-as-it-turns-30

Hawaiʻi Convention Center Roof Top Project

The Hawaiʻi Convention Center (HCC) rooftop terrace deck repair project is on schedule. The project aims to restore approximately 96,000 sq. ft. of the rooftop structure damaged by water intrusion, replacing the waterproofing system, and creating a flexible outdoor event space to enhance revenue opportunities.

Current Progress:

- Swinerton Builders continued demolition and investigative work on the third and fourth floors, adjusted schedules to reflect the delayed sprinkler determination, and maintained continuous oversight during two major rain events in February and one major rain event in March with no reported significant impacts.
- Financial forecasts remain unchanged from the prior month.
- Key risks include precast railing deterioration, long-lead times for design, engineering, procurement and installation of canopy materials, inclement weather, and pending permit approvals.
- Opportunities include value-engineering options to improve construction schedule and mitigate long lead material procurement, and coordination with HCC's events to minimize construction impacts.

The project remains a top priority to maintain HCC as a world-class facility and prevent further water damage to meeting spaces.

II. PROGRAM UPDATES

Destination Stewardship

The Destination Stewardship team continued to advance programs across the Destination Stewardship focus areas: Destination Management, Visitor Experiences, and Sports Partnerships.

Destination Management

DESTINATION MANAGEMENT ACTION PLANS (DMAPS)

See Planning Section for details for the development of the 2026 DMAPs. The Destination Managers are working together with HTA's Planning Team on this effort.

SMART DESTINATION APP/GOHAWAII UPDATE

Efforts shifted toward stabilizing operations and laying the groundwork for Phase 2 planning. The survey continued running without major disruption, with minor usability and data quality refinements applied to reduce respondent confusion and improve submission consistency.

Early adoption analysis revealed an estimated 6% conversion rate from arrivals to completed surveys. A key insight from this period was the absence of click-through tracking between the Akamai arrival page and the tourism survey — a gap that prevented full funnel visibility. Pacific Point has since begun implementation of click-through tracking to enable clearer analysis of user drop-off points. Separately, alignment discussions progressed on capturing additional non-PII parameters (such as home city/state/country and hotel name) to enrich downstream analysis, pending Attorney General guidance on allowable data fields.

Phase 2 planning was introduced during February, with an emphasis on stakeholder alignment before any scope or delivery commitments are made. A broad group of agency and legislative stakeholders were engaged — including representatives from DBEDT, HTA, DOT, and the State Senate — to gather input on priorities and direction. Given the breadth of perspectives received, HVCB and HTA are working to establish a formal governance structure, including a cross-agency Steering Committee, to ensure that scope decisions are properly authorized before planning advances.

Since the launch of the Digital Tourism Survey on the evening of December 24, 2025 through March 15, 2026, there have been 63,247 Digital Tourism Surveys completed, averaging 771 daily surveys. 17,314 passengers opted in for marketing messages. Efforts are being made to improve the capture of partial visitor survey data and approach the Airline Committee of Hawaiʻi to ensure greater compliance among airlines providing the Digital Tourism Survey to passengers. Opt-in language will soon be expanded beyond marketing messages to also include emergency notifications.

Visitor Experiences

HTA COMMUNITY FUNDING PROGRAMS

HTA's community funding programs empower local organizations to share the heart of Hawaiʻi with the world. By investing in projects created "by the community, for the community," HTA helps preserve the unique character of our islands while offering visitors a truly authentic glimpse into our way of life.

The five HTA community funding programs include: Signature Events, Community Enrichment Program, Kāhu ʻĀina, Kūkulu Ola, and Hoʻokipa Malihini Initiative. Below is a list of the thirty (30) projects that occurred between February 1, 2026 to March 31, 2026:

Program Name	Date	Location	Event/Project Name
Signature Events	3/13/2026 to 3/15/2026	Oʻahu	Honolulu Festival
Community Enrichment Program	2/28/2026 to 3/30/2026	Oʻahu	Wahi Pana: Stories Places
	2/6/2026 & 3/6/2026	Maui	Wailuku First Friday
	2/2/2026, 2/9/2026, 2/16/2026, 2/23/2026, 3/2/2026, 3/9/2026, 3/16/2026 & 3/23/2026	Kauaʻi	E Kanikapila Kākou 2026
	2/7/2026	Oʻahu	World Wetlands Day 2026 at Keawawa Wetland
	2/7/2026	Waimea, Hawaiʻi	Kahilu Festival Series: "Waimea Cherry Blossom Heritage Festival"
	2/13/2026, 2/14/2026, & 2/15/2026	Oʻahu	Zippys Hawaiʻi Esports Invitational
	2/14/2026, 2/15/2026, 2/16/2026, 3/7/2026 & 3/8/2026	Oʻahu	2026 Hawaii Club Volleyball Championship Series "Shaka Classic"

	2/14/2026	Kona	Wiliwili Love Festival
	2/14/2026 & 2/15/2026	Hilo	Panaʻewa Stampede Rodeo
	2/15/2026 to 2/22/2026	Kaua'i	Waimea Town Celebration: Heritage of Aloha 2026
	2/28/2026 (rescheduled to 3/22/2026)	O'ahu	The Art of Hawaiian Pāʻū
	3/27/2026	Maui	Prince Kūhiō Maui Hoʻolauleʻa
	3/28/2026	O'ahu	2026 Prince Kūhiō Parade
Kahu ʻĀina	3/6/2026, 3/14/2026 & 3/19/2026	Hilo	Mālama ʻĀina Community Workday
	2/14/2026 & 3/14/2026	O'ahu	Komo I Ka Aina
Kūkulu Ola	2/1/2026 to 3/30/2026	Kaua'i	An Interpretive Plan for Limahuli Tours (Garden Tours)
	2/7/2025	O'ahu	Niho ʻOki (Sharkʻs-tooth Knife) Workshop with ʻUmi Kai
	2/7/2026	Molokaʻi	Me Ke Aloha Project
	2/8/2026 & 3/8/2026	O'ahu	2025-2026 Kamaʻāina Sunday at ʻIolani Palace
	2/8/2026	Hilo	Hula Arts at Kilauea
	2/15/2026 & 3/7/2026	Hilo	E ʻŌlelo Hawaiʻi Kākou
	2/18/2026 & 3/18/2026	Hilo	Holomua Imu Mea Ai/ Imu building workshop
	3/14/2026	O'ahu	OHCRA “Stew Kalama Memorial Race”
	3/28/2026	O'ahu	OHCRA: "Mālama Pono ʻIa Nā Koa Race"
Hoʻokipa Malihini Initiative	2/3, 2/10, 2/17, 2/24, 3/3, 3/10, 3/17, 3/24, 3/31/2026	Hilo	Hilo Harbor Pier Greetings Program
	2/3, 2/10, 2/17, 2/24, 3/3, 3/10, 3/17, 3/24, 3/31/2026	Hilo	Hilo Gateway Information & Hawaiian Culture Program
	2/4, 2/5, 2/11, 2/18, 2/20, 2/25, 2/26, 3/4, 3/11, 3/18, 3/25/2026	Kona	Aloha Greeting & Cultural Program (Kailua-Kona Pier)
	2/7, 2/14, 2/21, 2/28, 3/7, 3/10, 3/14, 3/17, 3/21, 3/24/2026	O'ahu	2025 Kuhio Beach Hula Show & Torch Lighting
	2/6, 2/20, 3/6, 3/20, 3/27/2026	O'ahu	Waikīkī By Moonlight

Sports Partnerships

This program is designed to strengthen Hawaiʻi's position as a premier destination for sports tourism and events while fostering community well-being and economic benefits.

Through strategic partnerships, branding initiatives, and sustainable funding models, the program aims to deliver long-term value for Hawai‘i residents and visitors alike.

SONY OPEN RECAP:

The annual SONY Open golf tournament was held on Thursday, January, 15th through 18th, with the final economic impact for 2026. There was a total of 16,162 out-of-state visitors, less than a percent from last year’s total visitors overall. The slight decrease (-6%) were mostly from the International visitors from Japan, which could’ve resulted in the weak Yen rate exchange. However, the pickup in the US Mainland visitors increased (20%) and made up for the decrease in International visitors attending the event and kept the visitor expenditures total to a minimal decrease of only $200k overall, bringing the total economic impact expenditures total to $53,737,196 for 2026.

Brand Marketing

In February, the Brand Team focused on upcoming procurement activities, including the execution of supplemental contracts and preparation for the next round of RFPs for major market areas. The team also supported planning efforts for Tourism Day at the Capitol, the Spring Tourism Update in April, as well as IPW in May. On March 11, the team convened its second group meeting with all major marketing and stewardship contractors. During the meeting, the Activities & Attractions Association of Hawai‘i and VolunteerAlly presented their programs and products for promotion across the global markets. This month, following developments related to the Mexico and Iran situations, the industry has seen a slight uptick in both group leads and transient bookings. However, ongoing uncertainties, including rising oil prices, continue to pose risks to the long-term stability of inbound travel performance.

USA Major Market Area

In February, the *Hawai‘i Stays With You* campaign advanced post-production on select b-roll and photography while sustaining robust paid digital, social, and email marketing efforts as part of the media plan. Advanced TV/OTT partners, including Amazon, Samsung, LG, and Roku, distributed 30-second brand videos that generated 11.4 million impressions, complemented by OMD programmatic efforts that delivered an additional 2.2 million impressions through optimized video and search placements. Paid media across Facebook, Instagram, TikTok, and YouTube added more than 58.2 million impressions, featuring Hero, Culinary, and Leisure verticals along with static ads, while boosted organic and user-generated content on TikTok and Meta further extended overall reach. In addition, the February E-xpressly for Travel Professionals (EXTP) e-newsletter, themed “*Hawai‘i Stays With You*” was deployed on February 19 to 51,887 travel advisor subscribers.

Canada Major Market Area

Hawai‘i Tourism Canada (HTCAN) has recently gone all-in with the *Hawai‘i Stays With You* creative assets for both direct-to-consumer and travel trade focused initiatives.

High Traffic Billboards - The new creative was perfect for two unique billboards targeting affluent potential travelers in Toronto and Calgary. The visually compelling Toronto Wall Mural was over 80’ long and 7’ high and generated over 1,210,000 impressions over a 4-week period in February. Strategically located in the downtown core along a major walking tunnel route. While a smaller billboard was installed alongside a high-traffic food court in downtown Calgary. The location was chosen for its proximity to the finance district. Both executions were complimented with proximity video boards showcasing a brief clip from the “hero” video.

Winter Olympic Television – As first reported last month, the campaign was locally featured for the Winter Olympics on :15 and :30-second TV ads in between locally favorite sports like hockey, snowboarding, and curling, on CBC (Canadian Broadcasting Corporation) in Ontario. Advertising ran for the full duration of the Winter Olympics, ending on February 22, generating over 442,000 impressions and enjoying a VCR (Video Completion Rate) of 86%.

Travel Trade Activities
Recognizing the inspiring value of the four new videos, HTCAN aimed to encourage Travel Advisors to view the collection. Using a targeted mix of e-communications and social media, one post generated over 1,300 Advisor views, reaching over 800 accounts which represents very solid engagement from the Canadian travel trade community.

Focusing on over 2,000 Travel Advisors who have completed the Hawai‘i Destination Specialist Program, HTCAN created an email to showcase the new video collection. Additionally, multiple e-blasts were sent out via key trade media platform Baxter Media, Bonus activity included high profile website banners. Assets promoting the video collection generated over 58,000 impressions with Canadian Travel Advisors.

Oceania Major Market Area

Hawai‘i Tourism Oceania (HTO) exhibited at Flight Centre Expo Auckland, the much-anticipated consumer expo in Auckland, with almost 4,000 attendees during the day.

Hawaiʻi was well represented alongside HTO with both Hawaiian Airlines and Air New Zealand promoting show specials to Hawaiʻi. In February, HTO also participated in Brand USA Expo across Sydney, Brisbane, Melbourne in Australia; and in Auckland and Christchurch in New Zealand, engaging with more than 800 travel agents/travel trade attendees. In Brisbane, HTO supported a prize giveaway, with one agent winning a Hawaiʻi travel package provided by Hilton Hawaiian Village and Highgate. In Christchurch, HTO's Darragh Walshe joined a panel discussion, sharing insights on the destination and travel trends.

Japan Major Market Area

Hawaiʻi Tourism Japan (HTJ) continued promoting its *Yappari Hawaiʻi* campaign, which will run through March and positions Hawaiʻi as the next overseas destination for Japanese travelers. The campaign's digital placements generated 1,763,865 impressions in February. As part of the *Beautiful Hawaiʻi* campaign, HTJ launched eight original short videos on YouTube based on personal travel stories from Hawaiʻi. The *Beautiful Hawaiʻi* digital campaign achieved a total of 1,799,149 impressions during the month. HTJ also conducted a FAM tour on February 27 on Oʻahu with 10 agents from major travel agencies. On the same day, HTJ conducted a media webinar to promote the campaigns, attended by 60 media. The webinar was considered one of HTJ's most successful with most attendees rating it as "very informative" and "inspired us to plan feature stories about Hawaiʻi." Following the webinar, a major online media outlet also requested imagery for potential coverage.

Korea Major Market Area

Hawaiʻi Tourism Korea (HTK) partnered with MyRealTrip, one of Korea's leading OTAs, to launch a dedicated *All Ways Hawaiʻi* mindful travel promotion from January - February. The campaign featured curated island recommendations along with responsible travel guidance, generating 5,039 reservations (+26% YoY) and $2.6M in sales (+25.1% YoY). HTK also launched a partnership with Korean Air to promote the ICN–HNL route across 13 Korean OTA partners. The campaign includes a dedicated promotional page and homepage placements to drive incremental ticket sales and will run through March, targeting 400 incremental tickets YoY. Additionally, HTK is partnering with Asiana Airlines, Irum Tour, and Tour Links on a golf promotion from March – June, targeting 100 incremental bookings. HTK will also collaborate with NOL Universe to drive bookings through a dedicated landing page highlighting Hawaiʻi festivals and events. The campaign will run March – June, targeting 1,044 tickets (+10% YoY). To stimulate spending, HTK is launching a *Your One & Only Hawaiʻi* Promotion with VISA Korea and Shinhan Card, Korea's leading credit card issuer. The campaign features exclusive hotel offers, tour discounts, and a prize promotion for travelers who spend $150 or more in Hawaiʻi. Running March – May, the initiative targets $206.8k in additional spending YoY.

Europe Major Market Area

The British Museum's *Hawai'i: A Kingdom Crossing Oceans, which* opened in January, continues to runs through May 25, 2026. The exhibition is projected to reach approximately 80,000 visitors and generate 50 million campaign impressions during the exhibition period. In early February, Hawaiʻi Tourism Europe (HTE) took part in Visit USA Island Hopping 2026 in Zurich, welcoming 90 registered travel agents. HTE conducted six individual training sessions offering valuable insight into Hawaiʻi's unique experiences across the individual islands. Coming up, HTE will launch its ʻŌlelo Hawaiʻi Campaign in March, aimed to inspire visitation to Hawaiʻi and educate potential visitors on unique Hawaiian language.

China Major Market Area

Hawaiʻi Tourism China (HTC) has launched a new consumer promotion in partnership with Trip.com and the Prince Waikīkī Hotel BU. Running from February 18 to March 24, 2026, the campaign offers Trip.com users the chance to receive an exclusive "Blind Box" reward when booking a Beachfront King Room. Selected guests will enjoy a complimentary second night along with breakfast for two. Additionally, all room categories are available at a special discount for stays in May or December 2026. Guests can also claim a limited-edition digital red envelope cover featuring the hotel's signature oceanfront design. This promotion invites travelers to celebrate the festive season in Hawaiʻi with exceptional value, unique perks, and memorable experiences.

Taiwan Major Market Area

On February 24, Hawaiʻi Tourism Taiwan (HTT) partnered with Norwegian Cruise Line (NCL) to host a travel trade briefing aboard the Norwegian Sun during its port call in Kaohsiung. The event welcomed 38 travel trade professionals, where the HTT team showcased comprehensive Hawaiʻi travel resources and unveiled a new 11D9N Fly-Cruise Hawaiʻi itinerary. In addition to the trade briefing, HTT invited eight media representatives and two influencers to further promote the new itinerary and Hawaiʻi in general.

Cruise Industry in Hawaiʻi

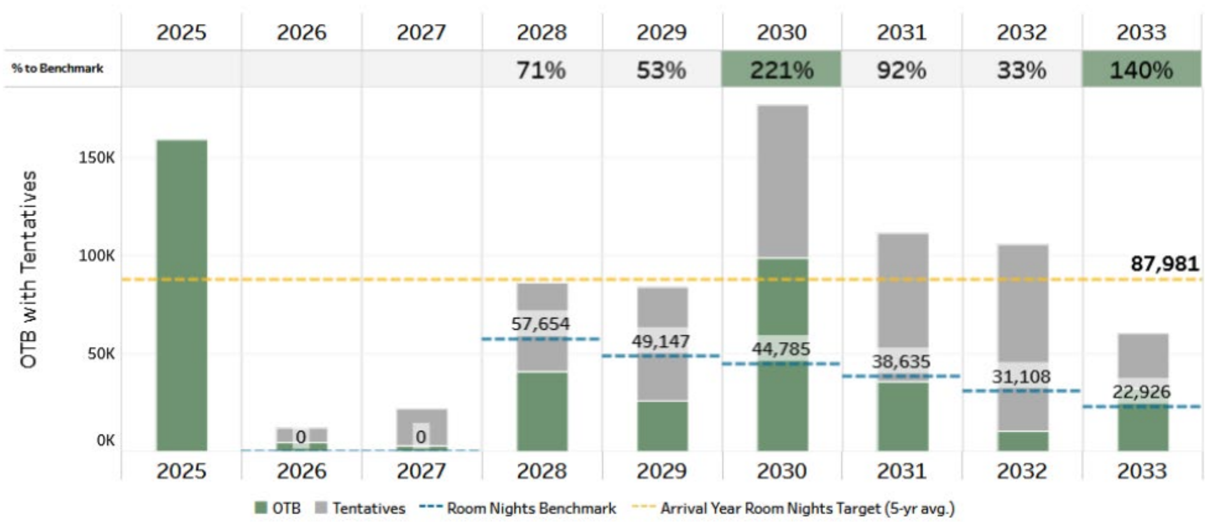
Princess Cruises – Shore excursion executives visited each of the Hawaiʻi ports the week of March 2. They met with local businesses, tour operators, HVCB, and HTA. Special thanks to Denise Clark, and everyone else who led and contributed to their market tour. Understanding local market needs and opportunities, including ways to infuse culturally-based programs, were key components of their tour.

Holland America – Announced rolling out new Hawai'i, Mexico and Panama Canal Sailings for the 2027–2028 season. The lineup includes extended Hawai'i voyages lasting 17–18 days. Guests will be able to enjoy activities ranging from agriculture and local history to native arts and geology, along with stargazing, luau and island-themed entertainment.

Meet Hawai'i - Sales Production

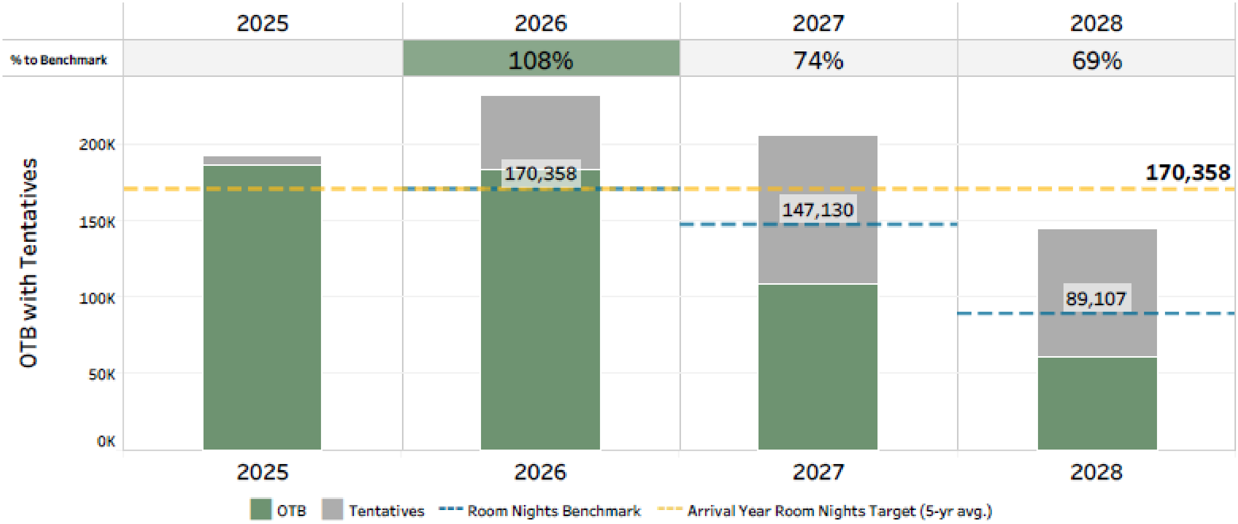
Citywide: February activity reflects the long-lead nature of the citywide convention sales cycle, in which sustained engagement and pipeline advancement occur well before definitive booking conversions. Current efforts are centered on converting high-value opportunities already in the pipeline while continuing to position Hawai'i competitively for future convention cycles. During February, three new leads totaling 30,466 tentative room nights were generated for arrival years 2032, 2033, and 2035. The pipeline now includes nine high-probability opportunities representing more than 80,000 tentative room nights and an estimated $280 million in economic impact, all of which are targeted for contract signature by June 30.

FuturePace Report: Convention Center 8-year Pace (citywide only)



Single-Property: February performance reflects strong Single Property sales execution, with definite bookings and pipeline activity exceeding same-time-last-year (STLY) benchmarks, driven by increased West Coast corporate demand and East Coast association programs building future-year room nights. Hawai'i continues to attract domestic corporate and association markets sourcing 2026–2027 programs, aligning with industry trends favoring the state as a safe U.S. meetings destination and supporting targeted outreach across corporate, incentive, and high-end association segments, including short-term relocation opportunities from Mexico. The month produced 30 definite bookings totaling 18,801 room nights, up 15,963 over STLY with Medical/Pharma and Engineering sectors leading production; 70% of room nights (13,225) were contracted for 2026–2027, 5,576 for 2028–2030, and 1,485 (7.9%) from Japan and Australia, highlighting continued international contribution. Pipeline activity remained strong with 101 new tentative leads representing 83,869 room nights, up 23% in lead volume and 55% in room nights over STLY.

FuturePace Report: Single Property 3-year Pace



Global Marketing Team Events

Date	Location	Event/Project Name	HTA Program
February / March	Australia	Ignite / My Hawaii Campaign	Oceania MMA
March	Australia & New Zealand	Ocean Film Fest	Oceania MMA
March	Australia	International Traveller Campaign	Oceania MMA
March	Australia and New Zealand	Luxury Escapes	Oceania MMA
March 5-6	Virtual	HPCJ Webinar	Japan MMA
March 7	Tokyo, Japan	Moananuiākea movie screening	Japan MMA
March 10	London, UK	Unite USA	Europe MMA
March 31 – April 1	Vancouver	Virtuoso Agent Training	Canada MMA

March – May	Oʻahu, Maui, Kauaʻi, and Island of Hawaiʻi	"All Ways Hawaiʻi" OTA promotion with NOL Universe	Korea MMA
March – May	Oʻahu, Maui, Kauaʻi, and Island of Hawaiʻi	Credit Card Local Spending Promotion with Shinhan VISA	Korea MMA
March 1	San Francisco, CA	MPI NCC ACE	Meet Hawaiʻi
March 4	Tokyo	Online Seminar: Participants of JTB MCI Ambassador Fam	Meet Hawaiʻi
March 2-4	San Fransisco / Oakland, CA	Meet Hawaiʻi NorCal Road Show	Meet Hawaiʻi
March 5	Reston, VA	CVB Reps Marriott NSO and client Tradeshow	Meet Hawaiʻi
March 11	Chicago, IL	GMC PCMA Luncheon	Meet Hawaiʻi
March 14	Oʻahu	JTB MCI Ambassador FAM Trip	Meet Hawaiʻi
March 23-26	Virtual	Destination Wedding & Honeymoons Virtual Roadshow	USA MMA
March 24	Virtual	Hawaiʻi Loves Travel Agents (Travel Weekly Event)	USA MMA
March 30-31	Denver CO, Salt Lake City UT, Phoenix AZ	HTUSA Educational Blitz Events	USA MMA
March 10-13	Nanjing, Suzhou, Hangzhou	AITS Roadshow	China MMA
March 17	Online	Shanghai Mei Yin International Travel	China MMA

Hawaiʻi Convention Center Events through Meet Hawaii

Date	Event Name	# of Attendees
March 14-16	Honolulu Festival	15,000
March 21-22	Aloha Region Spring Break Madness 2026	1,500
March 21-22	Feather Artwork Workshop #25	50
March 21-22	Ohana Education Weekend 2026	40
March 28-29	Aloha Challenge 2026	2,000

Planning

Destination Management Action Plans

The Destination Management Action Plans (DMAPs) are a key way HTA carries out its strategy to manage tourism in ways that support residents, protect cultural and natural resources, and strengthen the long-term health of each island. The next version of DMAPs will focus on priority hotspots and outline actions to mitigate or prevent further impact.

Public review of the draft DMAPs closed on March 2, 2026. Over 150 comments and suggestions were submitted through the HTA website and directly to each island's Destination Manager.

HTA also held island-specific webinars to present the priority hotspots and proposed actions, with more than 300 total registrants. These sessions were an important opportunity to explain how focusing on hotspots can drive measurable, site-specific improvements over the next three years and to address community questions.

The Planning team and Destination Managers are now incorporating feedback and expect to publish a final content draft around March 16, 2026. DMAP Advisory Group meetings will be held during the last 2 weeks of March for their final approval. The final draft DMAPs will go before the HTA Advisory Board for their blessing in April.

HTA's 5-Year Strategic Plan

The draft HTA Strategic Plan 2026-2030 was shared with the full Advisory Board on March 5, 2026. A Special Advisory Board meeting was held on March 12, 2026, where the plan was discussed and subsequently approved. Staff have since updated the draft HTA Strategic Plan based on the feedback from the Advisory Board and are currently working with a consultant to finalize it. The leadership team will meet with the DBEDT Director to seek his approval. Once finalized, the draft will be submitted to the Governor for final approval.

Program Evaluation

Preliminary data from our Destination Stewardship community programs held between July and December 2025 show these programs contributing over $87 million in direct visitor expenditures and generating nearly $160 million in sales. Visitor interest in these programs, spanning cultural and sporting events, generated over $12 million in government tax revenues. As data on last year's community programs come in, we will update our maps and analyses on our website.

III. FINANCIALS

HTA's financial results will be presented at the April meeting.

IV. PROCUREMENT

Executed Contracts - Pursuant to Hawai‘i Revised Statutes §201B-7 (9), below are contracts executed for this reporting period.

Contract No.	Contractor	Description	Contract Amount	Total Contract Value	Start Date	End Date
† 26019	PGA Tour Enterprises	PGA Tour Aloha Swing	$1,445,590	$1,445,590	02/23/2026	06/30/2026
Contract Type: † Procurement Exemption			$1,445,590			

Current Procurements - HTA regularly issues open solicitations – Requests for Proposals, Requests for Qualifications and Invitations for Bids – to secure professional services from qualified contractors in support of HTA’s mission on behalf of the State of Hawai‘i. A list of active solicitations is below.

RFP No.	Description	Release Date	Deadline
26-09	Evaluation of Selected Major Sports & Signature Events 2026-2028	03/06/2026	04/09/2026

6

Review and Discussion on Current Legislative Bills

LEGISLATIVE SUMMARY

Updated 3/19/2026

HRS §201B-3(a)(6) provides that the authority may, through its president and chief executive officer, represent the authority in communications with the governor and the legislature. All plans to testify, positions, and the text of HTA's testimony are submitted in advance and approved by HTA's Interim President and CEO, COO, and DBEDT Director prior to submission to the legislature. Once approved, HTA testimony is sent to the HTA Advisory Board along with hearing notices and links to hearing agendas and bill status.

Support

HTA's testimony **supports** bills introduced by the administration that restore its funding source as a percentage of the TAT and that restore its procurement exemption. It also supports bills closely aligned with HTA's mission, strategic plan, and legislative responsibilities.

- **HB 1950 HD1**—Creates a state-led marketing/branding special fund using a share of TAT and requires DBEDT to submit an annual marketing/branding/tourism management plan for legislative approval before spending. **
- **HB 2268 HD1** / **SB 3087**—Adds marketing and promotion of film production as an express HTA responsibility, supporting coordination between tourism marketing and film-related visitor demand.**
- **HB 1590 HD3**—Establishes/expands short-term vacation rental compliance tools and requires HTA destination management efforts to include encouraging use of lawful accommodations.**
- **SB 2577 SD2**—Directs DBEDT to study the benefits/costs of sports tourism in Hawaiʻi and report findings; appropriates funds.**

Commenting and Monitoring

HTA comments on bills that directly affect its operations, HRS §201B, the visitor industry, and destination management.

HTA

- **HB 1800 HD1**/ **SB 2500**—Executive budget bill establishing operating and capital appropriations for FY 2026–2027.**

Cruise

- **HB 2195 HD1** / **SB 2698SD2 HD1**—Establishes a per-passenger cruise head fee and a Cruise Ship Special Fund for port/harbor capital improvements; includes a retroactive repeal/transition related to cruise passenger accommodations tax.**

Tourism

- **HB 1948 HD2**—Prohibits lodging establishments from providing personal care products in small plastic containers in sleeping-room accommodations or public/guest bathrooms; establishes civil penalties.

** Written HTA testimony submitted (as of 3.18.26)

- **HB 2585 HD3** / **SB 3298**—Establishes uniform statewide standards for agricultural tourism in counties with agritourism ordinances, including county registration and requirements that agritourism remain secondary to ongoing agriculture.**

TAT and Special Funds

- **HB 1949 HD1**—Establishes the Green Fee Transparency and Accountability Program and the Green Fee Resiliency Impact Dashboard under the Hawaiʻi Climate Change Mitigation and Adaptation Commission; appropriates funds.
- **HB 2618 HD1**—Requires the Governor to request, via a bill separate from the budget, general funds approximating additional revenues generated by any TAT increase and by applying TAT to certain cruise-fare proceeds for climate change and tourism destination management projects.
- **SB 2921 SD1**—Transfers to the general fund the excess balances of various non-general funds and programs.**

Oppose

HTA testimony **opposes** bills that seek to dissolve HTA in whole or in part, because these are inconsistent with HRS §201B.
[none active as of 3/19/2026]

10

Presentation and/or Discussion of Japan Affluent Market Research Findings

Affluent Market Research Project Report

HAWAIʻI TOURISM™
JAPAN

Project Recap

Background

- Japan outbound travel recovery remains slow
- Weak yen and rising travel costs affect demand
- Japan’s affluent population has grown after the pandemic
- Opportunity to focus on high-value travelers rather than volume

Objective

- Increase tourism revenue through high-value travelers
- Understand motivations and barriers of affluent Japanese travelers
- Analyze perception of Hawaiʻi
- Identify strategies to increase spending and length of stay
- Support sustainable tourism growth

Market Context

- Japanese arrivals to Hawaiʻi remain below pre-pandemic levels
- Tourism revenue has not fully recovered
- Limited flight capacity restricts supply
- Increasing visitor volume alone risks overtourism

Strategic focus shifting toward quality and value

Marketing Strategy Targeting Affluent Japanese Travelers to Hawaiʻi

Measures to restore the number of Japanese travelers have already been implemented. However, even if Hawaiʻi's visitor numbers recover to pre-COVID levels (2019), revenue-boosting initiatives will still be necessary.
Therefore, this project will focus primarily on targeting affluent travelers. Through the planning, implementation, and operation of initiatives and systems, **it aims to contribute to revenue growth (spending, length of stay, and visitor numbers).**

Objective	Spending per person	Daily spending amount	Length of stay per person	Visitor numbers
2019年(Results)	$1427.5	$241.6	5.9 Day	1,576,205
2024年(Results)	$1482.6	$239.2	6.2 Day	708,234
2028年(estimated)*1	$1573.2	$259.6	6.1Day	820,000

*1　Extracted from DBEDT figures

Market Context

Radical Shifts in Hawai‘i’s Tourism Market

Impact of the COVID-19 Pandemic

- **A drastic decline** in the number of Japanese visitors to Hawai‘i.
- **A simultaneous, sharp drop** in tourism revenue.

Current Status (As of 2025)

- Japanese visitor arrivals remain at only 50% of their peak levels.
- Tourism revenue **has yet to recover**.

Structural Challenges

Air Seat Capacity:

- Flight frequencies remain reduced, with no significant recovery in seat numbers.
- Consequently, the overall supply remains constrained.

Visitor Growth Considerations:

- Simply increasing visitor numbers carries the risk of overtourism.
- It is essential to recover tourism revenue without over-relying on sheer volume.

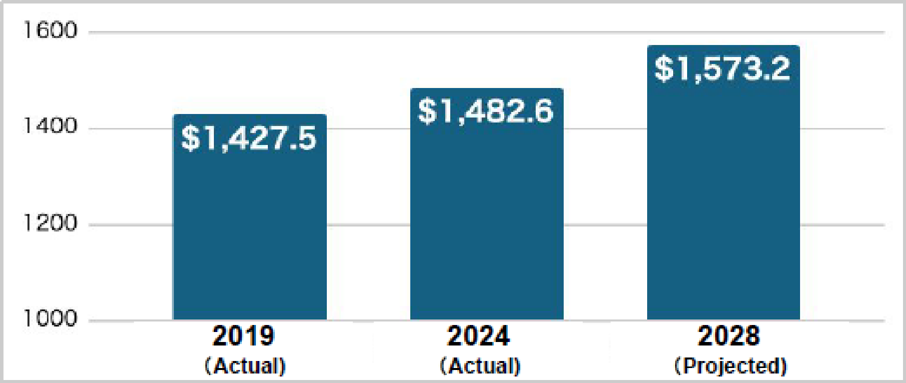
Strategic Shift

To recover tourism revenue while addressing structural challenges, it is crucial to **increase the average spend per traveler.**

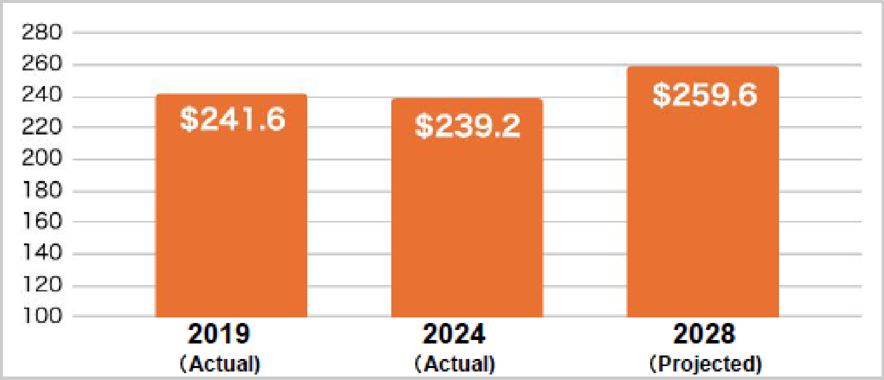
A unique approach is required to attract affluent Japanese travelers, who represent a segment with high travel expenditure, back to Hawai‘i.

Changes in Visitor Metrics

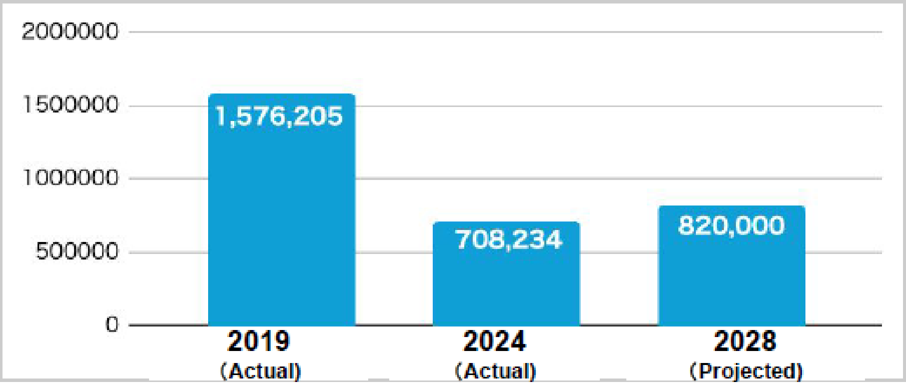
Spending per person
(Slight increase)



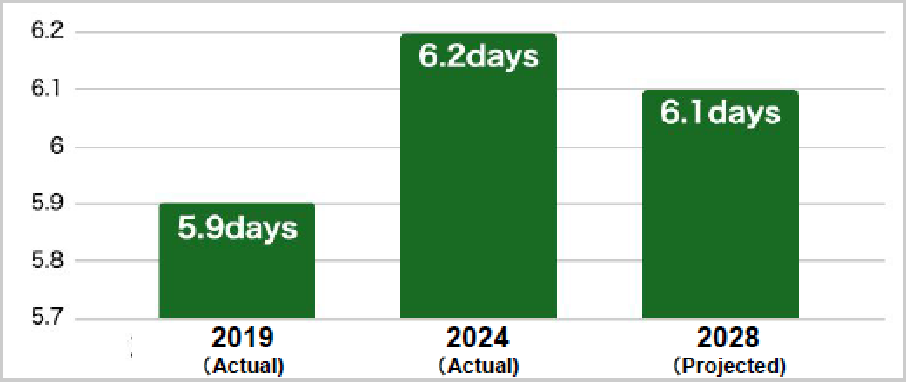
Daily spending amount
(Slight increase)



Visitor numbers
(Decrease)

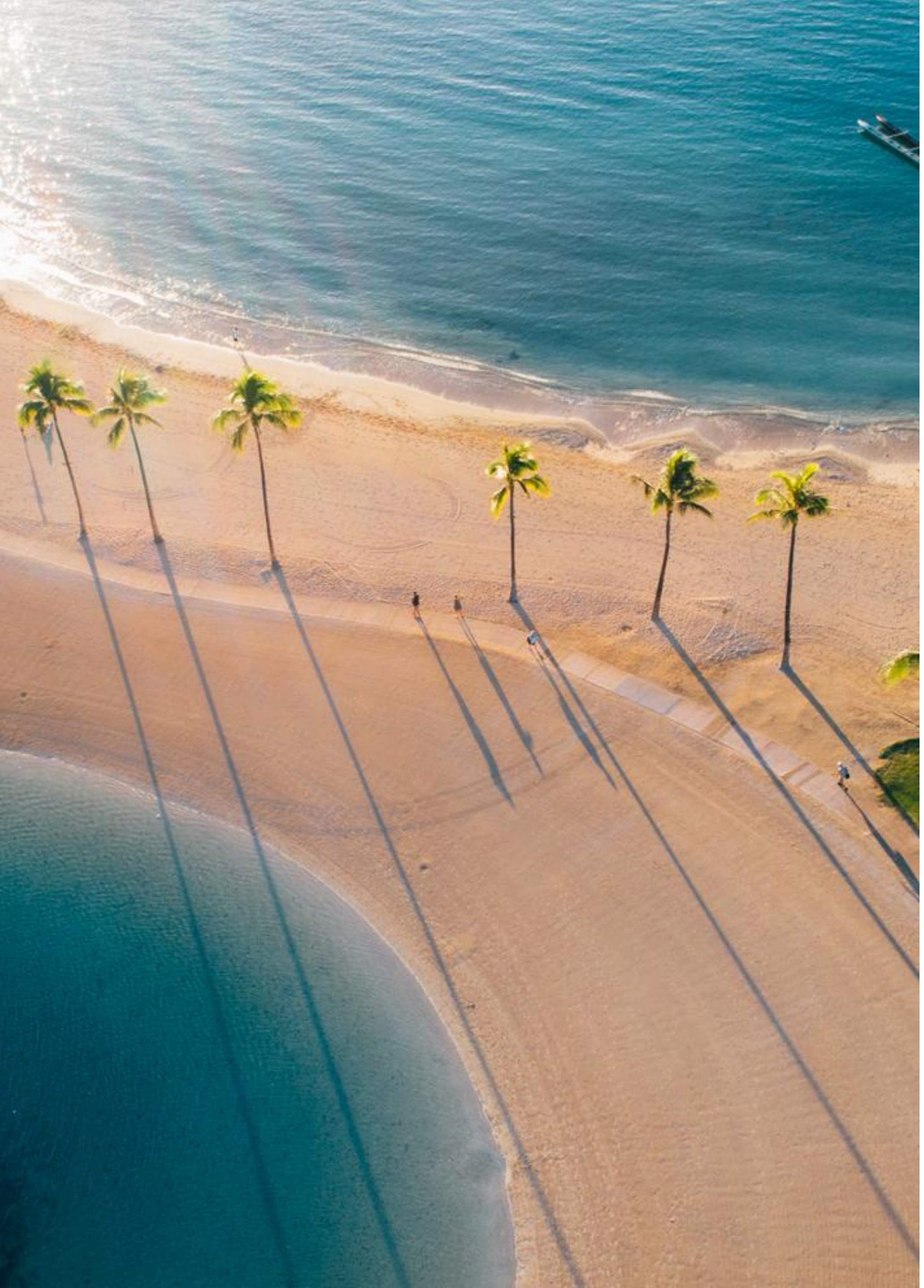


Length of stay per person
(Slight fluctuation)



FIVESTAR INTERACTIVE DNTI

*1 Extracted from DBEDT figures (2028 projection)



Research Methodology

- 4,000+ quantitative survey responses
- 16 in-depth qualitative interviews
- Participants selected from luxury brand membership database
- Included super wealthy, wealthy, and semi-wealthy segments
- Included both Hawaiʻi travelers and non-Hawaiʻi international travelers

Focus

- Travel motivations and decision-making processes
- Perception of Hawaiʻi as a destination
- Reasons for visiting or avoiding Hawaiʻi
- Expectations for travel experiences
- Information sources and trip planning behavior

Executive Summary

Currently, Hawai‘i maintains a certain level of demand as a "safe and standard" destination.
However, interview research has revealed challenges that directly impact the future.

Challenges and Risks		**Hawai‘i has already fallen off the radar for wealthy travelers.** This sentiment is particularly strong among wealthy and semi-wealthy individuals in their 30s to 50s who seek intellectual adventure. If this trend continues, Hawai‘i will face a structural decline in the length of stay, spending, and overall number of high-end visitors.
Cause		**Current PR messaging has remained stagnant since the 1970s**, failing to resonate with the needs of intellectually curious wealthy travelers. Furthermore, the explosion of information via the internet and SNS has intensified global competition.
Proposals	**Target**	**Highest Priority: Affluent Japanese who are currently not visiting Hawai‘i** specifically the 30s-50s "Adventure Faction" of the wealthy and semi-wealthy. ※Super-wealthy segment is on hold as a target because their needs are extremely niche and they already possess their own unique information channels.
	Method	**Develop a matching portal site to provide services for the affluent.** Through this, establish long-term relationships between Hawai‘i, the affluent, and partner businesses.
GOAL		Contribute to Hawai‘i's sustainable economic growth by recovering and expanding visitor metrics (length of stay, spending, and numbers) in the mid-to-long term via these long-term relationships.

Personas by Segment Super Wealthy class a.k.a "Celebrity Rich"

■ **Overview: A charismatic global founder and insatiable adventurer.**
While possessing "national-scale" wealth, he maintains a youthful, innovative mindset and relies on exclusive, off-market information.

■ **Values: A fusion of "Essential Discipline" and "Intuitive Creation".**
He enforces strict business rigor while prioritizing art and unknown experiences in private life. Driven by the theme of "Breaking Conventions," he invests in new talent over tradition. He views assets as tools to manifest his aesthetic sense and considers absolute privacy the ultimate luxury.

■ **Connection to Hawai'i**

- He eschews O'ahu's tourism for the "Pulse of the Earth" on the Big Island, finding inspiration in its magma and starry skies.
- He invested 2 billion yen in a prime Big Island estate to secure a completely private sanctuary inaccessible to tourists.
- He values time spent in primitive nature and lava fields to contemplate life from a cosmic viewpoint.
- Using direct hotlines to top local agents and artists, he acquires off-market property information and makes immediate decisions.

Model Case for Hawai'i Stay

Purpose: "Solitary thought" as a business leader and "release of sensibility" as an artist.
Duration: 2 weeks to 1 month (Direct flight to Kona Airport, Hawai'i Island, via private jet).
Characteristics: Stays at his 2-billion-yen residence, which resembles an art museum, built on the lava plateau or along the coast of Hawai'i Island. Uses a dedicated helicopter for access to pathless nature. Spends mornings following a strict routine to give directions to global bases, and afternoons conversing with artist and architect friends.

Profile

Age： 70s
Family： Wife, Son (holds key position in group company and is being groomed as successor). Strong family ties.
Financial Assets： Over 3 trillion yen
Residence： Shibuya Ward, Tokyo (Vast, fortress-like mansion)

Asset Background and Money Mindset

✔Possesses vast assets and dividend income from a globally listed company.
✔Obsessed with acquiring world-class real estate and top-tier collections.
✔Invests billions in art and architecture not as spending, but to leave a "cultural legacy".
✔Values "privacy" and "spectacular views" above all; buys at the asking price.
✔Provides significant donations to support young artists, education, and science.

Interests and Preferences

✔ Golf: Plays on courses that align with his personal aesthetics.
✔Contemporary Art: Collects and displays world-class pieces, such as Basquiats.
✔Philosophy & Reading: Reads voraciously to gain deep business insights.
✔Space & Science: Supports Mauna Kea Observatories and natural science.
✔Wine: Savoring the world's most premium vintages.

Personas by Segment Wealthy class a.k.a "New Rich"

■ **Overview:** A pre-global leader. An "**Education Investor**" and "**Intellectual Adventurer**" on the world stage. Pours passion and assets into business and next-gen education. Defines travel as an "opportunity for learning and growth".

■ **Values: Prioritizes "Intellectual Acquisition" and "Essential Growth".**
Dislikes "merely comfortable" time; seeks cultural depth and global leadership skills.
Rejects stereotypical luxury in favor of niche, trusted information.

■ **Connection to Hawai'i (Why they don't go)**
・Views Waikiki as lacking "intellectual excitement" or "survival skills" due to the high density of Japanese speakers.
・Deterred by the stereotypical image of "shopping and beaches"; seeks cross-cultural friction and academic learning.
・Can be attracted by Hawai'i's "academic side," such as geology, astronomy, and deep Polynesian spirituality.

Overseas Travel Model Case

Purpose: Provide "foundational experiences" for children and refine their "aesthetic sense" for art and culture.
Destinations: Switzerland (Boarding school visits) , UK (History/manners) , and Central Asia/Africa (Extraordinary experiences).
Characteristics: While children attend elite summer schools , parents visit art fairs or explore "unseen worlds" like Kyrgyzstan. They embrace inconvenience as "adventure" and prioritize deep local interaction.

Profile

Age: 40s to early 50s
Family Composition: Wife & children (elementary to junior high). Focus on multilingualism and liberal arts.
Financial Assets: Over 5 billion yen (Business & investment profits).
Residence:Ashiya, Hyogo or Minato, Tokyo.

Asset Background and Money Mindset

✔ Managing assets as a global owner-manager or angel investor.
✔Values "experience, education, and networks" over material goods.
✔Spares no expense on elite global education (tens of millions JPY annually).
✔Invests in solving social issues and fostering the next generation of leaders.
✔ Recognizes that assets should be "used" to foster the next generation of leaders, not just "protected."

Interests and Preferences

✔ Art Collection (Valuing empathy for the artist's philosophy, not just speculation)
✔ Travel (Secluded regions, historic cities, architecture tours)
✔ Reading (History, philosophy, science, geopolitics)
✔ Education Research (Investigating schools and curricula worldwide is a hobby)
✔ Stoic sports that self-discipline, such as triathlon and mountain climbing.

Personas by Segment Semi Wealthy class a.k.a ”Stable Rich”

■ **Overview:** A busy corporate warrior, a victim of information overload, and a **"proposal-awaiting traveler."** They have financial capacity but are constrained by time, taking only scheduled holidays.

■ **Values:** A yearning for **"complete escape from daily life"** and the **"destruction of predictable routine."** While expecting luxury, he finds true value in serendipitous interactions and authentic local experiences. They are not moved by uniform brochures or web media and lack the time or connections to unearth deep information themselves. They constantly crave a **"special plan tailored to them."**

■ **Connection to Hawai'i (Why they don't go)**
・Current Hawai'i feels like an **"extension of Tokyo"** due to the sheer number of Japanese people. The use of Japanese is a turn-off for those seeking a complete break from daily life.
・They feel that **"the current Hawai'i lacks content that compels them to visit."** Lacking the means to search for Hawai'i's deeper appeal, they judge it based on superficial information and exclude it from their options.
・Open to Hawai'i if presented with concrete links to asset formation (real estate) or hobbies (golf).

Overseas Travel Model Case

Purpose: "Fulfillment of curiosity" and unexpected "serendipitous encounters."
Destinations: Aegean cruises, visiting friends in Germany, or gourmet trips to Korea.
Characteristics: "Secure arrangements for peak holidays" combined with "local spontaneity." They are planners who book flights and hotels early as they can only travel during crowded periods like Golden Week or New Year's. However, locally, they dislike standard tours and seek "drama," such as making friends with locals and changing their plans.

Profile

Age: 40s.
Family: Wife (corporate manager) and two children in private school.
Household Income: 20–30 million JPY; Assets: 50–100 million JPY.
Residence: Detached house in Meguro Ward, Tokyo

Asset Background and Money Mindset

✔ Both spouses are high-earning salaried workers or professionals with stable income and strong social credibility.
✔ Due to their demanding schedules, they are willing to "buy time" by paying for high-quality travel arrangements and expert proposals.
✔ While focused on domestic asset formation, they have a strong latent interest in overseas real estate but lack established international channels.
✔ They are actively exploring overseas investment opportunities but remain cautious due to fragmented and confusing information.
✔ While their standard budget is under 1 million JPY per trip, they are willing to increase spending if the value proposition is truly convincing.

Interests and Preferences

✔ Golf: They aspire to play at world-class courses but find the logistical and arrangement barriers to be significantly high.
✔ Nature: They value outdoor activities such as hiking and fishing as essential means to clear their minds from professional stress.
✔ Fine Dining: They prefer a mix of high-end dining and authentic local spots that offer genuine culinary culture.
Fine Dining Local Interaction: They dislike being treated as mere tourists and deeply desire to engage with and enter the local community.

Key Findings and Conclusion

Two Groups of Values toward Hawai‘i

1. Hawai‘i travelers

【Conservative Faction】

Segment currently addressed by marketing

Seeks

"Security", "Relaxation" and "Passive Enjoyment"

Perception of Hawai‘i(Positive)

・An extension of daily life.
・Close, safe, and comforting due to the use of Japanese.
・A place for physical and mental rest.

Current Status

Satisfied, as the traditional appeal of 'healing Hawai‘i' matches their existing needs.

Non Hawai‘i travelers

【Adventure Faction】

Segment currently missed by marketing

Seeks

"Adventure" "Exploration" "Active Acquisition" and "Stimulation."

Perception of Hawai‘i (Negative)

・stereotypical place just for relaxing.
・Too many Japanese, lacking the thrill of being abroad.
・A place that cannot satisfy the spirit of adventure.

Challenge

Amidst many stimulating global options, Hawai‘i's 'safe and secure' image appears insufficiently appealing to this group.

【Conclusion】For the affluent Adventure Faction in particular, Hawai‘i's strong stereotype fails to stimulate curiosity and prevents it from being considered.

Target

We identify the Wealthy and Semi-Wealthy segments as our target audience (indicated in the yellow area below). Within this group, **the highest priority target** is the Affluent and Semi-Affluent individuals who "travel to overseas destinations other than Hawai‘i" (indicated in the red area below).

Target Affluent Tiers (3 Classifications)	Hawai‘i Engagement Level (2 Categories)	
	Current Hawai‘i Travelers	Non-Hawai‘iInternational Travelers
Super Wealthy class a.k.a ”Celebrity Rich”	Segment on hold as a target due to niche needs	
Wealthy class a.k.a ”New Rich”	Secondary Target	The highest priority target
Semi Wealthy class a.k.a ”Stable Rich”		

FIVESTAR INTERACTIVE DNTI

Challenges for Hawai‘i in Attracting Affluent Travelers

Challenges

Affluent non-Hawai‘i travelers find it difficult to satisfy their **needs for "adventure and intellectual exploration,"** while affluent Hawai‘i travelers are at **risk of "detachment from Hawai‘i"** depending on their life stage.
Common feedback from both groups includes that "**stereotypical images actively deter Japanese visitors"** and there is a **"lack of information beyond relaxation."**
Therefore, **redefining the value proposition and building sustainable relationships** are necessary.

1. **Non-Hawai‘i travelers are bypassing Hawai‘i due to a lack of intellectual stimulation.**
2. **Current Hawai‘i visitors risk future detachment due to life stage changes.**
3. **Strong stereotype images obscure true appeal and erode Hawai‘i's destination value.**
4. **Missing out on business and investment opportunities due to a lack of information.**

Affluent Japanese Services: Current Status and Gaps

Current Status of Existing Services

Affluent Tours
Ex: JTB Royal Road
Focus on minimizing risk and superior hospitality
→"High-Quality Experience with Zero Risk".

Luxury Real Estate / Membership Residences
Ex: Park Lane, Kohanaiki
Support in Japanese、Asset Preservation, Rest, Exclusivity
→"The Pursuit of Premium Relaxation"

Concierge Services
Ex: REI, ARKADEAR,Quintessentially
Resolution of all daily life issues, Reduction of effort for arranging/planning tours, restaurants, and transportation, Charter Booking Availability
→"Realization of the Finest Plans Tailored to Needs"

Education/ Relocation Support
Ex: Tokyu Livable
Offer practical support for specific goals like school arrangement and visa acquisition.

Gaps with Needs

Reinforces stereotypical images
Marketing focused on "blue ocean and white sand" strengthens stereotypes, which actively deters the target non-visitor demographic.

Limited Opportunity for Fulfillment
There are scarce opportunities for self-growth, building connections, or achieving fulfillment through contribution.
Customers are often left as mere "buyers," with limited pathways to engage in local networks or gain spiritual/social satisfaction.

Lack of Active and Unexpected Experiences
The prevailing service model is reactive—"taking requests and making arrangements"—which often results in predictable experiences and efficient consumption, lacking elements that generate uncertainty or serendipitous encounters.

Absence of Cultural and Historical Learning
Services center on practical support, not on delivering emotionally impactful experiences or exposure to new values. This fails to address the affluent segment's educational need for fostering "global leaders."

Existing services excel at moving "Minus to Zero" (minimizing inconvenience) but fail to deliver "Zero to Plus" (creating new value and self-transformation).

Strategic Direction

Vision

- Building Long-Term Relationships with Affluent Japanese Travelers
- Shift Hawaiʻi tourism from transactional visits to long-term engagement with affluent Japanese travelers

Goal

Create a sustainable community connecting Hawaiʻi and Japan through deeper cultural, personal, and experiential connections.

Strategic Directions

- Reposition Hawaiʻi as a destination for discovery, learning, and personal growth
- Shift brand messaging from resource-based appeal to people and community
- Provide exclusive information and personalized experiences

Conclusion

- Affluent Japanese travelers represent a high-potential segment for Hawaiʻi's tourism recovery, though current messaging and offerings need better alignment with their needs
- Research validates the BMP strategy and four target cluster framework as effective for this market
- The senior market promotion launching in April will serve as a catalyst to strengthen cluster integration and industry collaboration


Mahalo
HAWAIʻI TOURISM
JAPAN

11

Presentation and/or Discussion of U.S. Maui Emergency Marketing Campaign Final Results

HAWAIʻI
VISITORS & CONVENTION BUREAU ™

Maui Emergency Marketing Campaign

18 March 2026

Campaign Overview

The Maui Emergency Marketing Campaign (MEMC):
$6M program dedicated to supporting tourism recovery to Maui

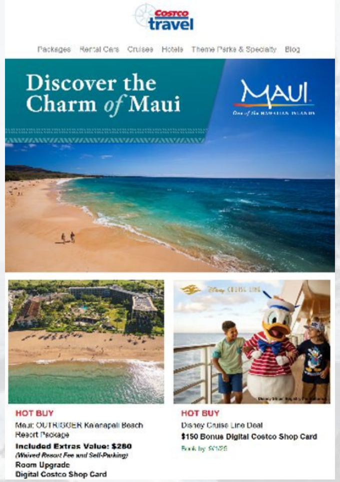
Paid social creative

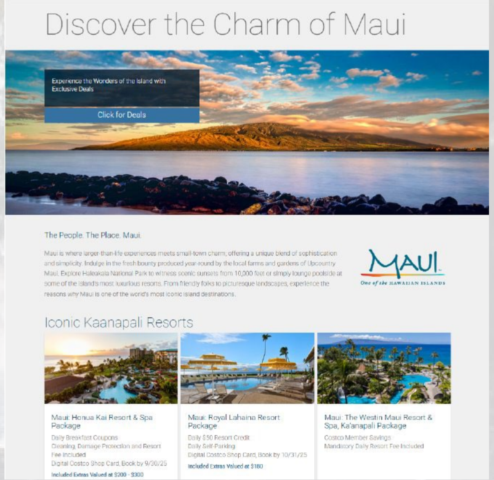
- Program focused on increasing Maui brand awareness and driving Wholesale packages and direct bookings
- Launched in June 2025 and wraps in May 2026, with expected halo effect to carry forward in 2026
- Program consists of a Wholesale Channel Co-op, Digital and Social Media Direct Booking, Public Relations and MCI conversion programs
- Investment includes market study to understand pre-, during, and post-campaign impact

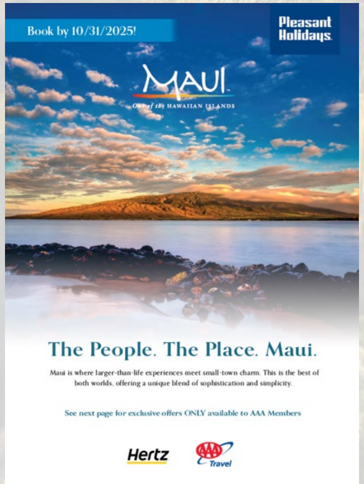
Wholesaler Programs

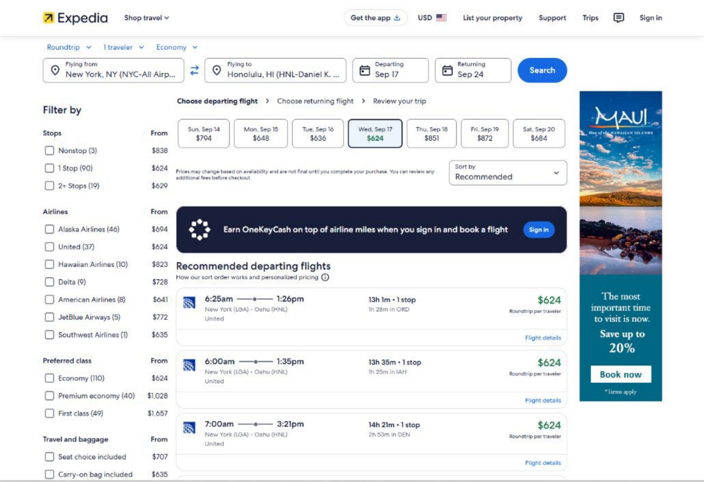
Significant investment to maximize promotion and drive production

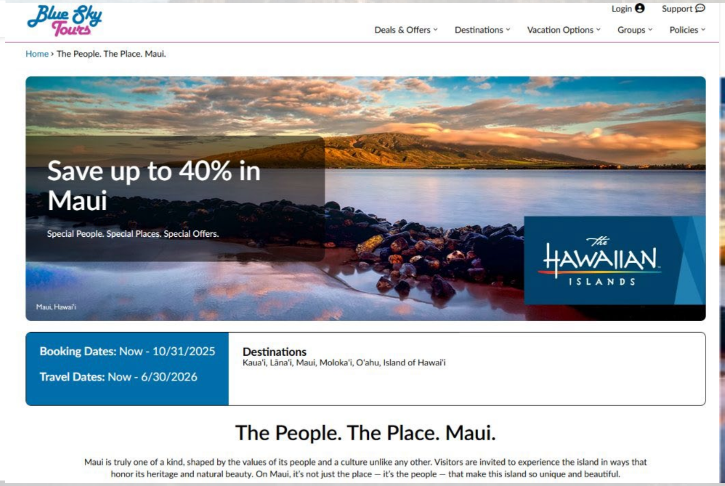
- **Expedia**
- **Costco Travel**
- **Pleasant Holidays**
- **ALG Vacations**
- **Delta Vacations**
- **Classic Vacations**





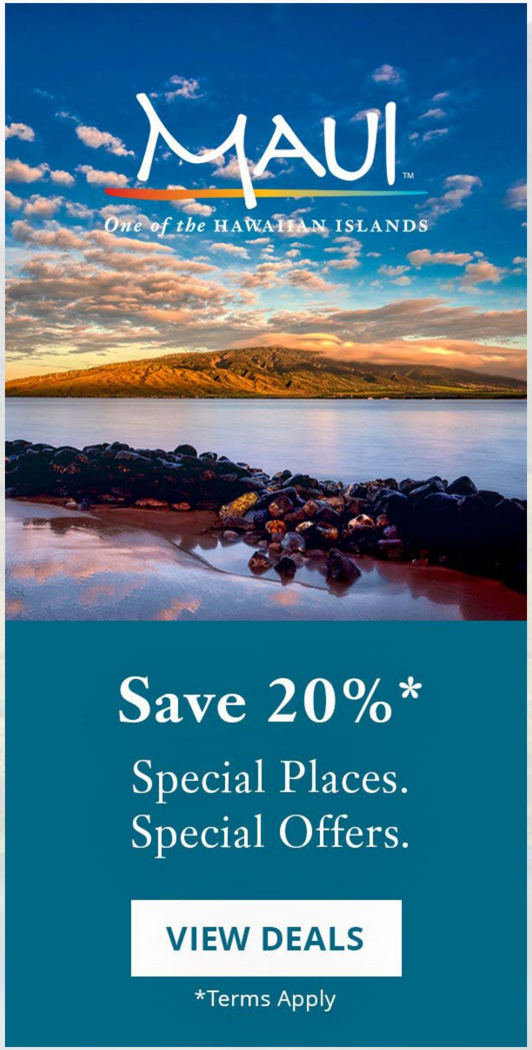


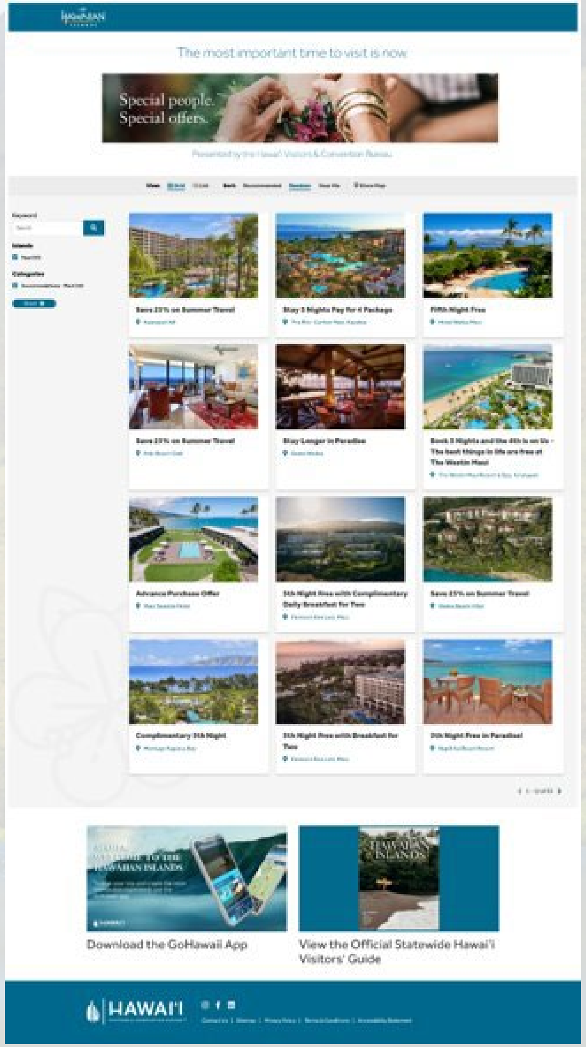




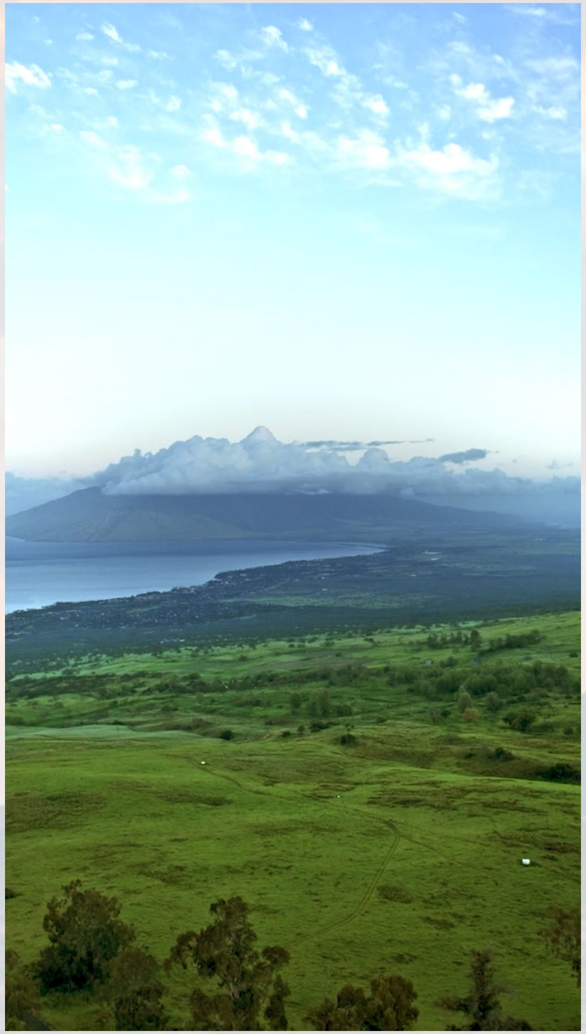
Direct Booking Program

- Hosted on hvcb.org, Hawaiʻi Special Offers landing page defaulted to showcase Maui offers
- Promoted 245 vetted Maui Special Offers with direct booking links to partner offers
- Targeted consumers in top producing Hawaiʻi markets
- Two (2) flights of paid media
- Complemented brand and wholesaler tactical programs





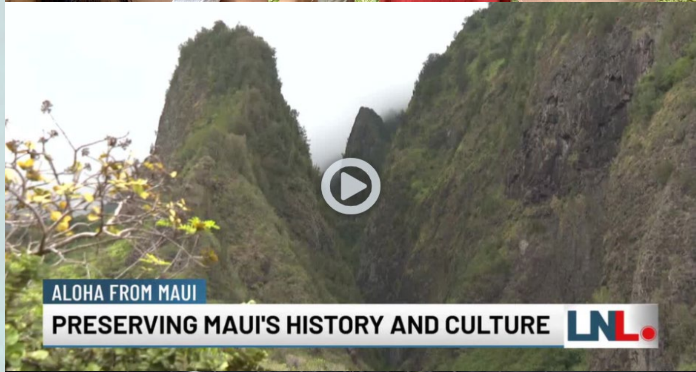
Social Media Campaign



- Paid social campaign activated across:
  - Facebook
  - Instagram
  - YouTube
  - TikTok
- Target Hawaiʻi travelers in key West Coast cities:
  - Los Angeles
  - San Francisco
  - San Diego
- Focus on CTA to access Maui Special Offers page, driving urgency to book next getaway

Public Relations

SEPTEMBER	**Multi-market News Series** • CBS LA, Portland FOX, Phoenix CBS, FOX Las Vegas, etc. **Maui Press Trip** • Andaz Maui at Wailea, Aston Kāʻanapali Shores, Westin Maui Resort & Spa, Maui Ocean Center, Coco Deck Lahaina, Maui Pineapple Store, Maui Kuʻia Estate Chocolate
OCTOBER	**International Media Marketplace LUX** • Fairmont Kea Lani, Montage Kapalua Bay • 92 appointments: Robb Report, Travel + Leisure, Condé Nast Traveler, etc.
NOVEMBER	**Entertainment Tonight** • Wailea Resort Association, Wailea Beach Resort • 10-14 November



2025 Calendar

<table>
<tr><th>Initiatives</th><th>MAY</th><th>JUN</th><th>JUL</th><th>AUG</th><th>SEP</th><th>OCT</th><th>NOV</th><th>DEC</th></tr>
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<tr><td>Expedia</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Costco Travel</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Pleasant Holidays</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
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<tr><td colspan="9">Direct Booking Program:</td></tr>
<tr><td>Paid Digital Media - CTA
“Hawai‘i Special Offers”</td><td colspan="2">- Paid Digital
- LA Rams Maui Camp</td><td></td><td></td><td colspan="3">Paid Digital Media</td><td></td></tr>
<tr><td colspan="9">Social Media Campaign:</td></tr>
<tr><td>Paid Social Media</td><td></td><td></td><td></td><td></td><td colspan="2">Instagram, Facebook, YouTube, TikTok</td><td></td><td></td></tr>
<tr><td>Public Relations Programs:
Satellite Media Tour / IMM</td><td>Satellite Media Tour</td><td></td><td></td><td></td><td>Satellite Media Tour & Maui Media Visits</td><td>IMM LUX</td><td>Entertainment Tonight</td><td></td></tr>
<tr><td>Travel Trade Education Events</td><td colspan="2">Travel Advisor
Education & Training</td><td></td><td colspan="4">Travel Advisor
Education & Training</td><td></td></tr>
<tr><td>MCI Incentives</td><td></td><td colspan="7">Targeted Offers</td></tr>
<tr><td>Post Conversion Brand Study</td><td></td><td>Pre-Wave QR</td><td></td><td></td><td>Data Collection & Impact Assessment</td><td></td><td></td><td>ROI Assessment</td></tr>
<tr><td>Expenditures</td><td>$100,000</td><td>$502,000</td><td>$1,100,000</td><td>$650,000</td><td>$1,200,000</td><td>$1,200,000</td><td>$725,000</td><td>$523,000</td></tr>
</table>

Campaign Results

Final results showed positive growth across digital programs

Wholesaler Program

- **78,544** incremental room nights
- **126%** YoY increase

Direct Booking Program

Paid Digital Media

- Impressions: **143.7M**
- Clicks to Special Offers: **312K**

- MCI Economic Impact: **$15.8M**

Social Media

Paid Social Media

- Impressions: **91.8M**
- Video Views: **4.7M**
- Clicks to Special Offers: **347.7K**

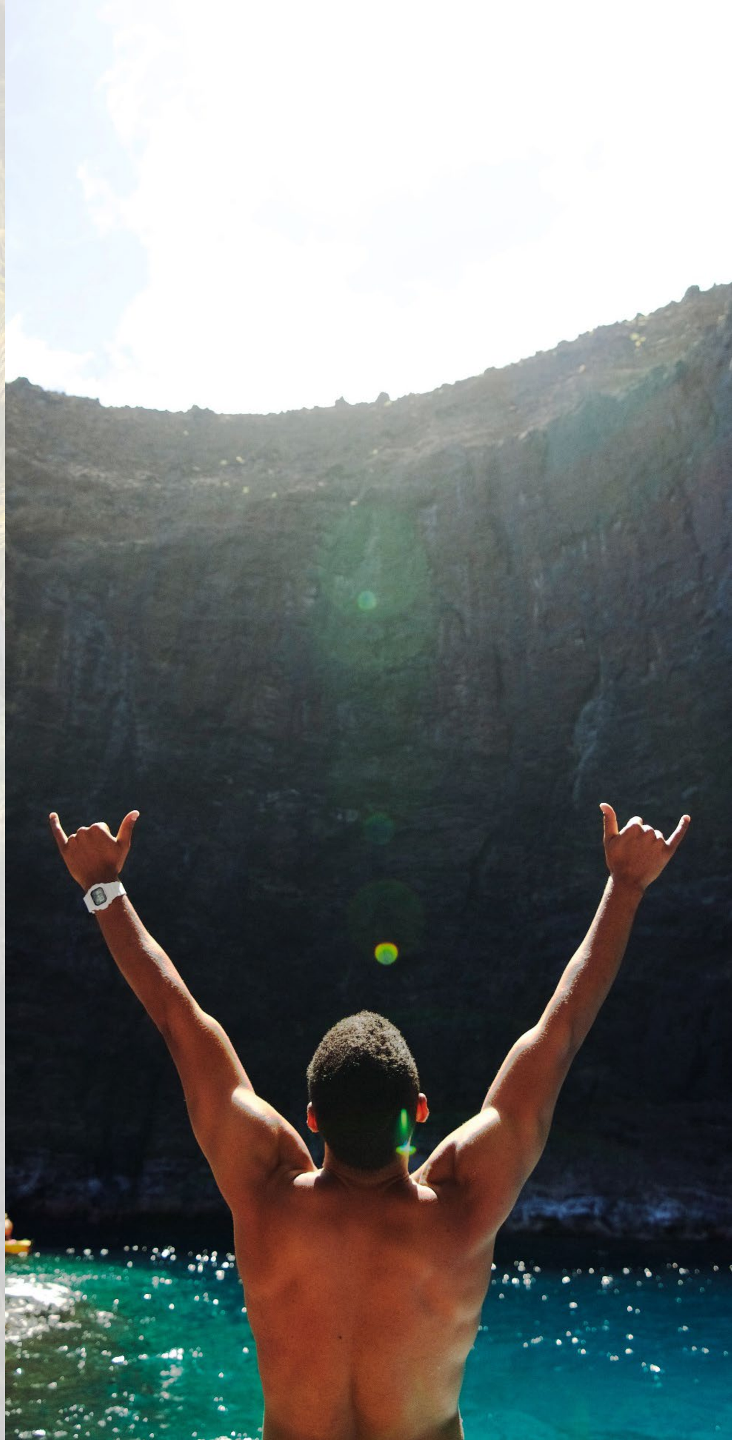
Maui STR Hotel Data

		Occupancy %			Average Daily Rate			RevPAR		
		2025	2024	% Pt. Change	2025	2024	% Change	2025	2024	% Change
July 2025	Wailea	76.0%	68.8%	+7.3%	$776.97	$818.78	-5.1%	$590.80	$562.94	+4.9%
	Lahaina / Kāʻanapali / Kapalua	66.2%	57.9%	+8.3%	$465.62	$465.64	0.0%	$308.45	$269.65	+14.4%
August 2025	Wailea	69.9%	63.3%	+6.6%	$702.47	$727.22	-3.4%	$490.79	$460.11	+6.7%
	Lahaina / Kāʻanapali / Kapalua	61.2%	50.8%	+10.4%	$394.58	$403.76	-2.3%	$241.46	$205.14	+17.7%
September 2025	Wailea	60.5%	56.5%	+4.0%	$599.22	$627.14	-4.5%	$362.52	$354.45	+2.3%
	Lahaina / Kāʻanapali / Kapalua	61.1%	49.8%	+11.3%	$345.76	$379.68	-8.9%	$211.14	$188.90	+11.8%
October 2025	Wailea	74%	59.4%	+14.6%	$610.21	$639.66	-4.6%	$451.40	$379.78	+18.9%
	Lahaina / Kāʻanapali / Kapalua	65.3%	52.4%	+12.9%	$349.49	$387.28	-9.8%	$228.27	$202.91	+12.5%
November 2025	Wailea	73.7%	67.6%	+6.1%	$672.84	$710.25	-5.3%	$495.87	$480.19	+3.3%
	Lahaina / Kāʻanapali / Kapalua	65.3%	56.2%	+9.7%	$371.84	$401.33	-7.3%	$244.94	$225.42	+8.7%
December 2025	Wailea	72.4%	69.4%	+3.0%	$1,059.00	$1,064.71	-0.5%	$766.65	$738.51	+3.8%
	Lahaina / Kāʻanapali / Kapalua	67.2%	58.7%	+8.5%	$525.60	$519.87	+1.1%	$353.21	$305.37	+15.7%
January 2026	Wailea	78.0%	70.2%	+7.8%	$755.95	$840.66	-10.1%	$589.40	$590.21	-0.1%
	Lahaina / Kāʻanapali / Kapalua	69.7%	59.7%	+10.0%	$436.66	$465.29	-6.2%	$304.19	$277.62	+9.6%

Results – Wholesaler Program

- Maui County averaged 64.6% occupancy (**+7.5** pts YoY) and **7.7%** RevPAR growth, despite a **4.9%** decline in ADR

- Initial wholesaler YoY aggregate room night performance:
  - **June** **59,960 (100%)**
  - **July** **67,604 (117%)**
  - **August** **69,373 (140%)**
  - **September** **62,626 (125%)**
  - **October** **60,401 (118%)**
  - **November** **59,886 (126%)**
  - **December** **63,454 (130%)**



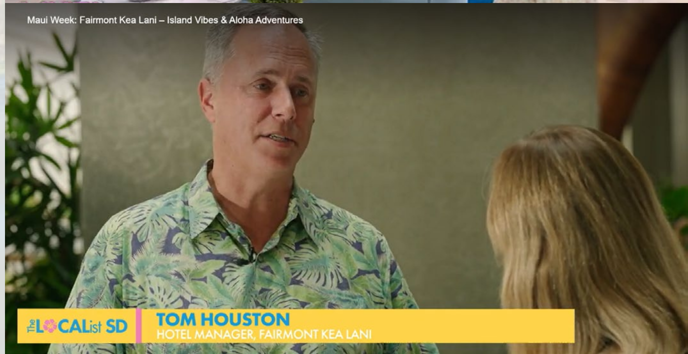
Results – Direct Booking Program

Hawaiʻi Special Offers Program (Maui-focused)

- 2 Flights of Paid Media:
  - West Coast (May 15 – Jun 30)
  - Top Markets (Aug 25 – Nov 30)
- Total Direct Booking and Social Impressions: **236M**
- Total Click-Throughs to Special Offers: **660K**

Maui Nui Kākou: Maui Week Promotion

- TV spot market promotion across 14 source markets
- 90 pieces of custom content produced wth coverage in spot markets
- TV Impressions: **81M**
- Digital Impressions: **39M**



Results – Direct Booking Program

Maui MCI Immediate Conversion Incentive

Campaign 1 – Incentive Sales Program

- Incentives Awarded: $10,500
- Total Room Nights: 4,107
- Economic Impact: **$4.3 million**
- **ROI:** For every $1 invested, the campaign generated ~**$410 in economic impact**
- Cost per Room Night: $2.56

Campaign 2 – IMEX Activation

- Incentives Awarded: $19,000
- Total Room Nights: 8,465
- Economic Impact: **$11.5 million**
- **ROI:** For every $1 invested, the campaign generated ~**$605 in economic impact**
- Cost per Room Night: $2.24

Results – Direct Booking Program

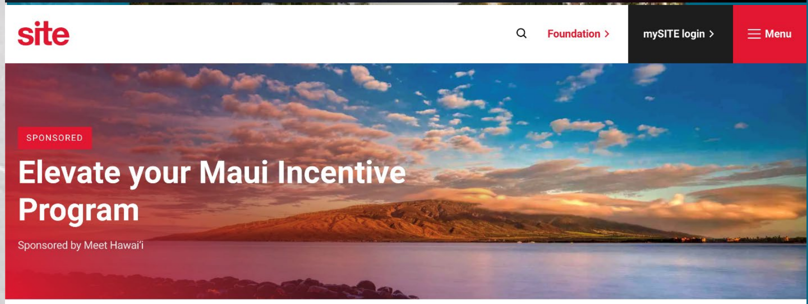
Maui MCI Immediate Conversion Incentive

Campaign 3 – Maui Incentive Marketing Program

Launched to drive group incentive business to Maui.
Partnered with SITE Global (Society for Incentive Travel Excellence)

Targeted incentive planners with limited-time 2026 Maui offers to drive leads:

- SITE IncentiveWise homepage article
- SITE dedicated planner eblast
- SITE retargeting banner flight
- MH owned database eblast



Results – Brand Efforts for Maui Recovery

- **Media & Social Media Campaigns – Maui Creative**
  - **91.8M** paid social impressions, exceeding projections by **43.4%**
  - **347.7K** clicks to Maui-focused messaging and special offers content

- **Public Relations Inititatives**
  - Five broadcast television news segments (Sep – Nov 2025)
    - **12.5M** impressions
    - **$840,512** in earned media value
  - Maui Press Trip
  - IMM LUX 2025
  - Entertainment Tonight's "Hawai'i Week"
    - **15M** total viewers

Results – Brand Study

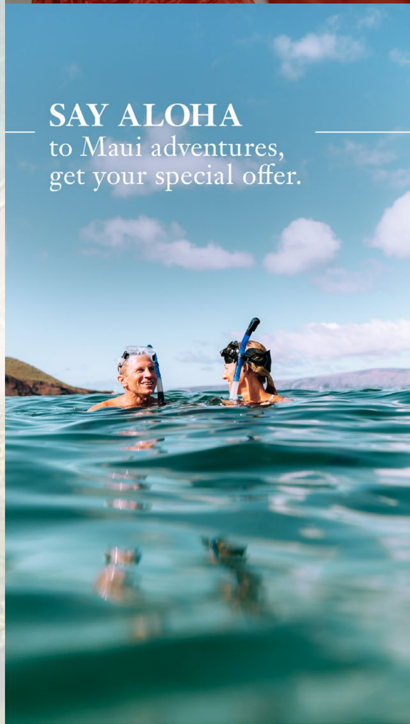
Before Measurement (Pre-Activation)

- Among those likely to visit Hawaiʻi in the next year, Maui lead with nearly 60% saying they would include it, while Hawaiʻi Island (47%) sits just behind Oʻahu (49%)

Impact Assessment (During/Post-Activation)

- 40% of qualified travelers recall the advertising, with higher awareness in California (43%) and among travelers under 55
- Impact scores were excellent for:
  - **“Visit Maui” (4.17)**
  - **“Support local businesses on Maui” (4.08)**

Conversion Measurement & ROI (expected April 2026)



Mahalo

11

Presentation and/or Discussion of Examining Global MCI (Meetings, Conventions, Incentives) Market Conditions and Identifying Opportunities for Hawaii

Meet HAWAIʻI™

Global MCI Update

18 March 2026

MCI: High-Value Business That Builds Hawai‘i’s Future

ECONOMIC IMPACT

- Meet Hawai‘i generates nearly half of the $1.1B in total attendee expenditures reported by DBEDT
- Annual Event Economic Impact: $857M (2025)
- MCI visitors spend more per day, stay longer, and generate meaningful tax revenue statewide

PLANNING HORIZON

- Single Property Meetings, 6–18 months in advance
- Large conventions, 3–5 years in advance — creating a predictable, long-range economic pipeline
- Short-term opportunities (sports, incentive, corporate) add near-term value
- Forward bookings help stabilize the destination and support stronger leisure performance

LEGACY VALUE

- Connects Hawai‘i to global industries, academic institutions, and professional communities
- Visitors often return as leisure travelers — MCI creates lasting brand advocates
- Legacy impact: cultural stewardship, workforce development, community investment

MCI: High-Value Business That Builds Hawai‘i’s Future

MCI Booking Cycle

1. RFP issued, proposal submitted (Year 1)
2. Top destinations selected — site visit conducted (Year 1–2)
3. Contract negotiated and signed (Year 2–3)
4. Group arrives (Year 3–5)

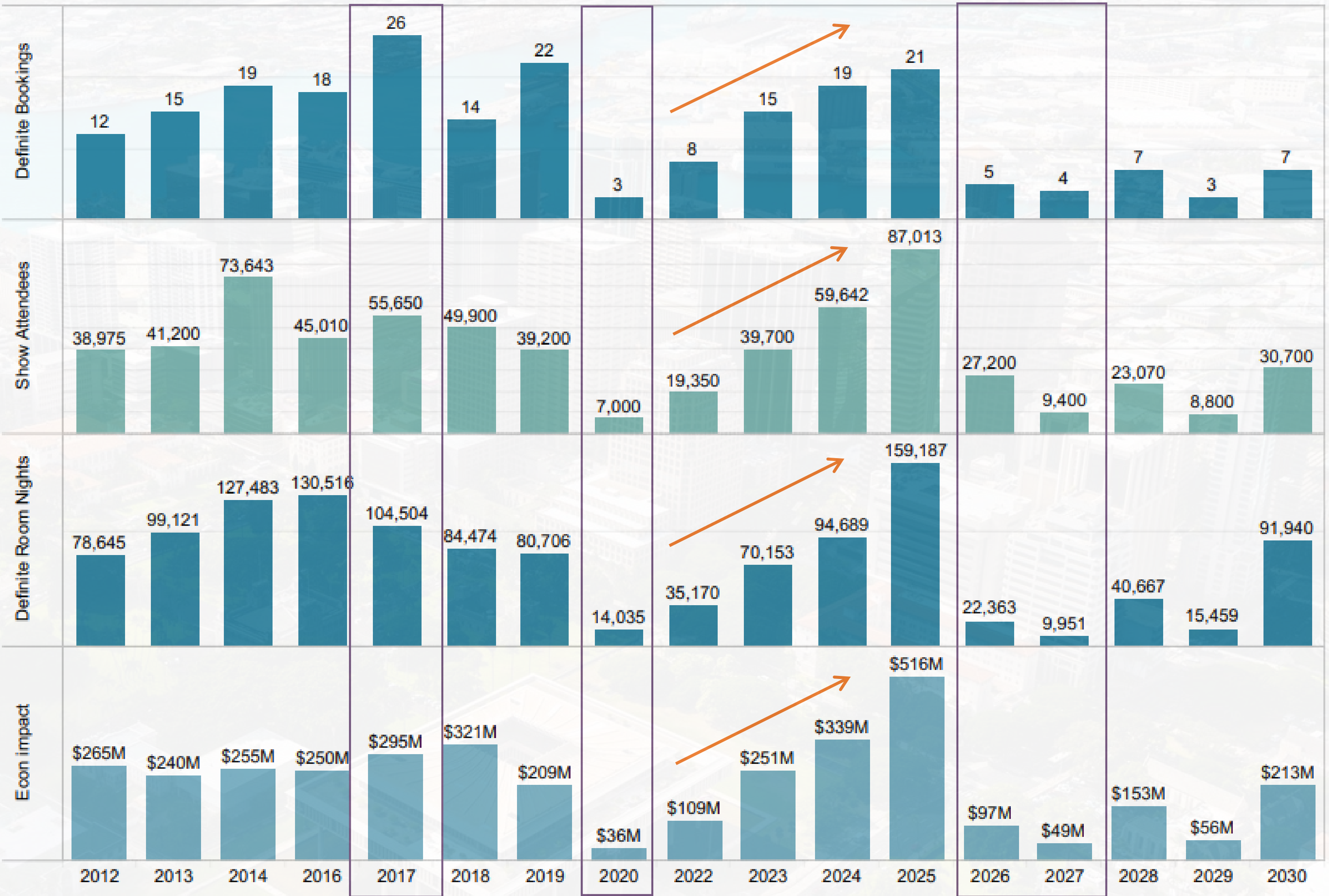
What Protects the Cycle

- Venue certainty and consistent messaging
- Competitive incentive tools (MFF)
- Planner trust built over years
- A destination that shows up — every time

This business moves on trust and long planning cycles. When certainty is disrupted, recovery takes time.

Hawai‘i Convention Center – The Long View

- HCC Opened in 1998
- Peak performance: 2017, 20 years after opening
- 2020/2021 Pandemic Disruption
- 2024/2025 Strongest Financial Performing Years
- 2026/2027: Partial Closure



Before the closure: Hawai‘i at its best

2024 & 2025 – Our Strongest Financial Years

2024:

- 19 Citywide Events
- 94,689 Total Room Nights

2025:

- 21 Citywide Events
- 159,187 Total Room Nights

	OTB Events	% of OTB Net Rent and F&B	% of OTB Room Nights
Medical, Healthcare	5	15.8%	15.8%
Scientific	5	11.9%	29.3%
Government	4	9.8%	3.1%
Trade Assns	2	9.0%	12.0%
Educational	1	9.5%	3.4%
Fraternal, Service	2	6.2%	6.9%
Real Estate	2	6.9%	7.9%
High Tech	1	5.3%	1.9%
Energy, Environment	3	5.6%	4.4%
Sports	6	4.5%	2.9%
Technology	1	3.8%	2.1%

A Sequence of Compounding Disruptions

2023–2025

Mar 2023	Honolulu Star Advertiser article on HCC roof leaks reaches key markets
Nov 2023	Start/stop construction announced for proposed repairs
Q1 2024	Decision made: HCC will close fully in 2026 — start/stop not feasible
Q1–Q2 2024	CW team relocates 2026 groups; working to keep business in destination
Q3 2024	Marketing Flexibility Fund structure and approval process adjusted; some groups move to other destinations
Mar 2025	⚠️ Closure extended through 2027 — previously relocated groups must move again
Q4 2025	One contracted 2028 group cancels — cites reasonable doubt on construction timeline
Late 2025	HCC renovation renderings released + on-time delivery confirmed — market re-engages

Why 21 Events in 2028 is a Strong Recovery Target

2028 groups made commitment decisions during the period of highest uncertainty around the Convention Center Timeline

THE TARGET

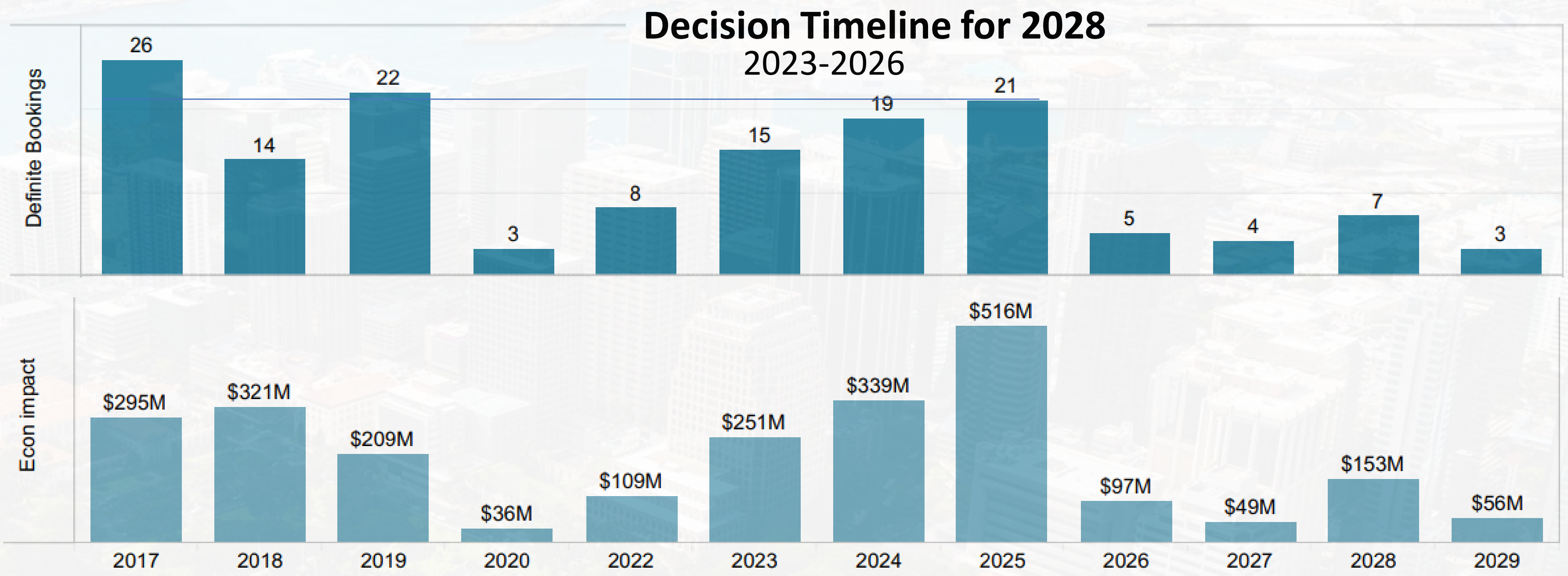
21 events – Developed with HCC Leadership

THE CHALLENGE

2028 Decisions made during peak uncertainty

THE TRAJECTORY

21 is a milestone, not a ceiling



*2026–2027 groups remaining in destination + weekend bookings; no full citywide conventions

21 Events represents a strong recovery milestone given the compressed booking window following the renovation period.

The Forward Pipeline: Active, Advancing, and Growing

Why this matters: Long-term demand for Hawaiʻi is moving forward

YEAR	DEFINITE EVENTS	DEFINITE ROOM NIGHTS	TENTATIVES
2028	7	40,667	46,452 (8)
2029	4	26,046	48,065 (7)
2030	8	98,815	51,234 (5)
2031	2	32,525	76,034 (5)
2032	1	10,280	102,968 (9)
2033	3	32,135	45,068 (5)

TOTAL ACTIVE PIPELINE

48
Active Leads

438K
Room Nights in Opportunity

$1.5B
Potential Economic Impact

241K
Potential Attendees

ACTIVE CLOSE CAMPAIGN: JUNE 30 DEADLINE:

9 high-probability opportunities advancing to contract

• 80,000+ tentative room nights • Est. $280M economic impact

Sustaining the Destination While We Rebuild

MCI is an Ecosystem

Keeping Business in the Destination – 2026-2027

- Asia/Oceania team: 4 active opportunities closing in 2026/2027 @ HCC

Single Property – Stabilizing the Destination Statewide

- February tentative pipeline: +23% leads, +55% room nights over STLY
- Maui Incentive Campaign: Launched with SITE Global
- Crisis Relocation Campaign: targeting groups displaced from international markets.

Single property sustains the ecosystem – Keeping hotels across all islands active, partners engaged, and Hawaiʻi visible while we rebuild.

Future MCI bookings yield higher leisure rates. When conventions are confirmed, the entire destination benefits – compression, airlift, supplier revenue, and community investment rise together.

Selling Today, Building for Tomorrow

- International Market Development
  MOU’s with ABTS and Singapore
- 2028-2029 HCC Promotion
  Enhanced incentives for groups committing by June 30. Meet Hawaiʻi and HCC aligned on every active opportunity
- Multi-Year Incentives (short term)
  Multi-year agreements securing 2026 through 2028 in a single commitment—converting near-term interest into long-term pipeline.
- Future Demand Calendar
  Led by Market Insights, this tool identifies need periods across islands and aligns group sales efforts to highest-value compression windows.
- Legacy Impact Framework
  Embedding community stewardship and cultural engagement into the MCI sales process — ensuring the groups we bring to Hawaiʻi reflect the values of the destination.

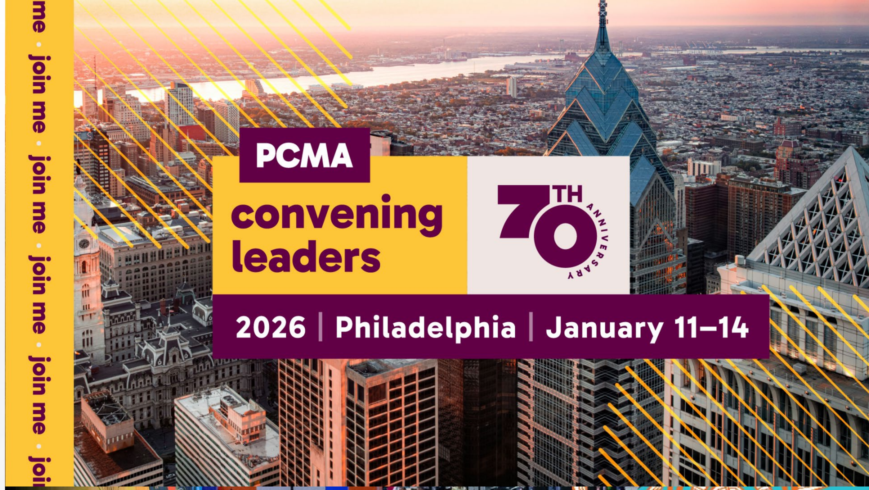
Highlights

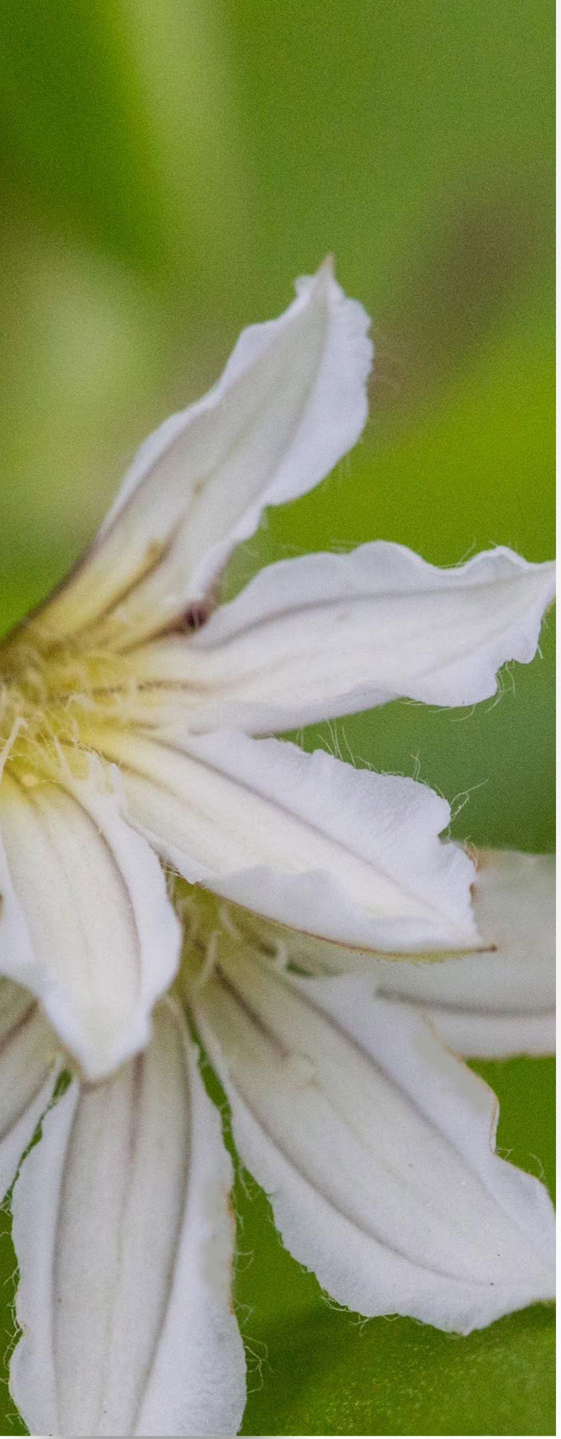
Q1 Highlights

- PCMA Convening Leaders (Philadelphia)
- CESSE CEO Board Meeting
- AIME 2026 (Melbourne)
- Meet New York
- Northern California Road Show

Looking Ahead

- Japan Summit
- California SAE Elevate
- SportsETA
- Destinations International – Sales, Services
- IAEE Women’s Leadership Forum
- Japan Corporate Event (Tokyo)
- Meet Hawaiʻi Oceania Aloha Mission (Australia)





The Right Groups = The Right Impact

We are not just counting events.

We are building the right portfolio of groups — those that deliver the strongest economic return for the Convention Center, the greatest impact for the destination, and meaningful legacy for Hawai'i.

HVCB and HCC are integrating our systems and data to measure success not only by event count, but ty the value those events deliver.

Together we are focused on:

- The right mix of groups
- The right HCC return
- The right destination impact

Mahalo