



**BRANDING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY**

VIRTUAL MEETING

Wednesday, October 8, 2025 at 1:30 p.m.

Meeting will be live streaming via Zoom.

<https://us06web.zoom.us/j/86828776504>

You may be asked to enter your name or email. The Board requests that you enter your full name, but you may use a pseudonym or other identifier if you wish to remain anonymous.

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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 via Zoom will be accepted through the Q&A feature on Zoom.

Written testimony received ahead of the preparation of the committee packet will be included in the packet. Email written testimony to Carole Hagihara-Loo at Carole.m.hagihara@hawaii.gov or hand-deliver or send via postal mail to the Hawai'i Tourism Authority office, 1801 Kalākaua Avenue, 1st Floor, Honolulu, HI 96815. Written testimony received after the issuance of the committee packet (three business days prior to the meeting) will be distributed to the committee and available for public inspection at the meeting.

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 Location is Nonpublic**
- 3. Approval of Minutes of April 21, 2025, Branding Standing Committee Meeting**
- 4. Presentation and/or Discussion of 2026 Brand Marketing Plans for USA, Canada, Japan, Oceania, Korea, China, Taiwan, and Europe Leisure Markets, and Global Meetings, Conventions and Incentives*****
- 5. Adjournment**

***** 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.

If you need an auxiliary aid/service or other accommodation due to a disability, contact Carole Hagihara-Loo at (808) 973-2289 or Carole.m.hagihara@hawaii.gov as soon as possible, preferably no later than 5 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 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). The ICT audiovisual connection will be located on the 1st Floor in the Lobby area fronting the Hawai'i Tourism Authority at the Hawai'i Convention Center at 1801 Kalākaua Avenue, Honolulu, Hawai'i, 96815.

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**Approval of Minutes of the
April 21, 2025
Branding Standing Committee Meeting**



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**BRANDING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY
Monday, April 21, 2025, at 1:30 p.m.**

Virtual Meeting

MINUTES OF THE BRANDING STANDING COMMITTEE MEETING

MEMBERS PRESENT:	Roy Pfund (Chair), Lisa Vice Chair Paulson (Vice Chair), Kimberly Agas, David Arakawa
MEMBERS NOT PRESENT:	Mufi Hannemann, Chris West
NON-VOTING MEMBERS:	James McCully
HTA STAFF PRESENT:	Kalani Ka'anā'anā, Caroline Anderson, Isaac Choy, Jennifer Bastiaanse, Trishia Mendoza
GUESTS:	Eric Takahata, Lynn Whitehead, Tom Mullen
LEGAL COUNSEL:	John Cole

1. Call to Order and Opening Protocol

Ms. Anderson called the meeting to order at 1:34 p.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

Ms. Anderson conducted the roll call, and members were confirmed in attendance by themselves, except for Mr. Hannemann and Mr. West, who were excused.

3. Approval of Minutes of the March 17, 2025, Branding Standing Committee Meeting

Mr. Arakawa proposed a motion to approve the minutes, and Vice Chair Paulson seconded it. There were no objections, and the motion was passed unanimously.

Chair Pfund moved Agenda Items #4 and #6 to the end of the present meeting, as they were to be discussed during the executive session.

5. Update on the Japan Affluent Market Study

Interim HTA CEO Ms. Caroline Anderson introduced the speaker, Mr. Eric Takahata, Managing Director of Hawai'i Tourism Japan (HTJ).

Mr. Takahata emphasized that the plan was still under consideration for the Japan Affluent Market Study to be funded by the proposed additional appropriation of \$300,000. HTJ had established a framework and outline and was to request further details from the market research company.

Mr. Takahata explained that HTJ had discussed possible actions to mitigate the two primary challenges for the Japanese market: the dollar/yen exchange rate and U.S. inflation. He stated that Hawai'i's pricing was among the highest globally and was cost-prohibitive, thus hindering the return of the Japanese market to pre-pandemic levels.

Mr. Takahata indicated that industry partners had concluded that Hawai'i was not effectively reaching individuals possessing financial resources, often referred to as affluent or high-value travelers. Industry partners suggested that an ideal way for the destination to raise visitor expenditure would be to increase individual travelers' spending while reducing travelers' footprints.

The HTJ team had determined that it was necessary to conduct additional research into the development of targeted programs and initiatives for affluent travelers. During pre-pandemic times, 1.5 and 1.6 million Japanese visitors traveled to Hawai'i annually, but post-pandemic conditions restricted travel to affluent individuals.

Mr. Takahata remarked that Hawai'i needed access to a broader pool of affluent Japanese individuals, noting an improvement in the exchange rate and economic conditions as evinced by the value of the yen at 140 per U.S. dollar that morning, reflecting a decline of 15 yen compared to the previous month. This improvement in the exchange rate made travel from Japan to Hawai'i more attractive, and HTJ anticipated an increase in bookings from middle-class travelers seeking Hawai'i as a destination.

Mr. Takahata believed that developing the affluent market would minimize dependence on economic fluctuations. He noted that other destinations, such as Singapore, were investing considerable resources to attract affluent Japanese travelers, and data confirmed the success of these efforts.

Faced with budgetary constraints, the HTJ team proposed that focusing on the affluent market would most likely yield an optimal return on investment. This plan was spurred by input from industry partners who reported that Hawai'i had not effectively positioned itself as a destination for the affluent market. The HTJ team also proposed the additional goal of cultivating a database of affluent visitors who could be targeted for travel to Maui and

neighboring islands while addressing price-related challenges, such as the \$1,000 nightly rates on neighboring islands. The HTJ team believed that neighbor island visitation would increase if a larger number of affluent travelers were reached. The fact that these individuals had already visited destinations such as Singapore, the Maldives, and Dubai demonstrated that they could develop an interest in Hawai'i as a destination.

Mr. Takahata pointed out that targeted initiatives and messaging were required to attract the attention of the affluent traveler, but an advantage was that the timing of their travel was flexible since programs attracting them could target "soft seasons." Mr. Takahata also added that even affluent travelers would be attracted by value-added programs.

Mr. Takahata explained that the allocated amount of \$300,000 marked the initial phase of a multi-step process. Step 1 was to involve the collection and analysis of data along with clarification of the target profile, while Step 2, still under consideration, aimed to build a framework, develop value-added programs, create an implementation system, and execute promotions.

Step 1, involving pre-project research and analysis, had been tentatively scheduled for the late third quarter and the fourth quarter of 2025 and was to comprise two sub-steps:

Step 1–1: Data Collection and Analysis:

The wealthy class in Japan was to be identified by comprehensive data collection, research, and analysis. Profiles of wealthy Japanese travelers were to be refined, and initiatives, incentives, and investment opportunities would be conceptualized. The HTJ team had noted significant interest in Hawai'i among Japanese investors, suggesting that affluent traveler initiatives likely stimulate economic development at the State level. Hence, it was expected that this initiative would attract affluent Japanese travelers and promote investment in Hawai'i across sectors such as retail, renewable energy, and transport development.

Step 1–2: Strategy Development

The data collected in the initial phase inspired the development of strategies, including identifying potential local partner companies for collaborative efforts and creating an RFP for a company capable of implementing and executing this program.

Mr. Takahata presented a flow chart provided by the research company, outlining digital platforms for subsequent phases of the program. He explained that the intention was to access the affluent class by encouraging their enrollment into a "club" database, adding that such limited membership clubs were popular in Japan due to their exclusivity. These clubs were to offer incentives, investment opportunities, and concierge services that would attract affluent individuals to visit Hawai'i and identify viable business opportunities for investment in the State.

Mr. Takahata explained that the objective was to develop, maintain, and increase the database's size to attract more affluent travelers and encourage their investment in Hawai'i. He presented visualizations of the software's projected mobile and web versions and stated that the implementation was expected to be straightforward, with the research company providing collected data. The sales platform (SP) version was to be executed via affluent-targeted social media campaigns on mobile devices, alongside a web version for which Mr. Takahata provided screenshots of reference views and traditional web interfaces.

The HTJ team was working on several ideas to attract travelers, such as the development of events originating in Hawai'i. Partners willing to organize events for affluent travelers had been identified, such as an exclusive annual event at Aloha Stadium targeting affluent members and encouraging them to view Hawai'i as a leisure destination and an investment opportunity.

Mr. Takahata elaborated on other potential incentives for members, such as an airport fast lane for first-class passengers, although collaboration with the Federal Government and Customs and Border Protection (CBP) would be required. Preferential investment opportunities would encourage affluent individuals to perceive Hawai'i as a promising investment destination. Mr. Takahata concluded his presentation by suggesting that once the database was established, it could serve as a basis for further development of initiatives and events targeting affluent travelers.

Chair Pfund thanked Mr. Takahata for his presentation and invited questions from committee members.

Mr. Arakawa appreciated the detailed explanation but cautioned against revealing too much information during a public meeting, given Hawai'i's competition with destinations such as Singapore, the Maldives, and Dubai.

Mr. Arakawa asked when the yen/dollar differential had been an issue and opined that it had been two or three years. He questioned why strategies for attracting Japanese travelers had not yet been fully developed and wondered aloud whether the proposed expenditure of \$300,000 would yield the best return on investment. He compared the proposed initiative with the Maui emergency plan, which aimed to attract as many Japanese travelers as possible by offering varied accommodation and pricing options. Mr. Arakawa asked whether allocating the funds to broad-based advertising would be more effective than a study on affluent travelers, which might take time to execute.

Mr. Takahata thanked Mr. Arakawa for his comments and explained that the HTJ team had debated these issues. They had concluded that, at the present time, the allocation of \$300,000 to broad-based advertising or promotions would be unlikely to yield meaningful

results. It was important for Maui messaging to target affluent travelers, but first, it was necessary to identify the specific clusters to which this message should be directed. The team had reasoned that given the current situation with Japanese visitor numbers less than half of pre-pandemic levels, a more focused and strategic approach would benefit Hawai'i most. The team believed this targeted method would be more advantageous at present and in the long term compared with spending \$300,000 on untargeted advertisements for the general visitor base.

Mr. Arakawa asked whether destinations such as Singapore, the Maldives, and Dubai were employing similar targeted strategies. Mr. Takahata confirmed this was the case, noting that competition with these destinations was a challenge for Hawai'i because their governments were investing significantly in infrastructure development, including hundreds of millions of dollars in upgrading infrastructure, enhancing national treasures, improving national parks, and expanding airport access. Mr. Takahata cited the example of a Chinese airport where a special terminal for pet travel had been constructed. This demonstrated how other destinations created niche opportunities for affluent travelers.

Mr. Takahata admitted that it would be a challenge for Hawai'i, as a single state, to compete against entire countries regarding infrastructure investment. The HTJ team also acknowledged that affluent individuals often sought value for their expenditures. Hawai'i needed to emulate the efforts of competing destinations such as Singapore and Dubai, which successfully attracted affluent travelers through effective outreach and messaging.

Vice Chair Paulson thanked the Chair and greeted Mr. Takahata. She noted that Maui was a non-international airport and inquired whether the HTJ proposals would include "white-glove service." She asked if visitors choosing to travel to Maui would experience seamless and efficient baggage handling and transfers to neighbor island airlines.

Mr. Takahata thanked Vice Chair Paulson for raising this matter and explained that a major Japanese travel agency, Highest International Standards (HIS), had been working on the white-glove service. HIS had expressed interest in partnering with HTJ on this initiative, which would focus on Maui and is currently in the preliminary stage. HIS was the only Japanese travel wholesaler with an office in Maui, although the Japan Travel Bureau (JTB) had previously maintained a Maui office.

Mr. Takahata expressed optimism that advances in travel technology, such as mobile passport control, would allow Japan to participate in global entry and would facilitate the inter-island flights they were targeting. He added that these developments in travel technology were expected to enable international travelers to visit Maui without needing to pass through customs. Mr. Takahata also pointed out that initiatives such as Clear, TSA PreCheck, and Global Entry were evolving rapidly, reducing the urgency for pre-clearance.

He conveyed his optimism about improvements in conditions for Japanese travelers. He noted that several operators were interested in offering such white-glove seamless services for affluent travelers seeking the smoothest possible journeys.

Vice Chair Paulson thanked Mr. Takahata and Chair Pfund.

Mr. Choy asked how affluent Japanese travelers were defined, and Mr. Takahata responded that the millionaire class was to be targeted, though an in-depth study of this group had not yet been conducted.

Mr. Choy asked whether this referred to an annual income of one million dollars or some other measure. Mr. Takahata replied that the exact definition was still to be determined. He noted that affluence was previously defined based on household income, although it had never reached the one-million-dollar threshold. He added that the targeted travelers would have more wealth and could be classified as "high-affluent."

Mr. Choy asked how many individuals in Japan had annual incomes of one million dollars. Mr. Takahata responded that while this was a group of considerable size, detailed statistics on them were to be obtained from the research company.

Mr. Choy asked whether the assessment would focus on individuals or households. Mr. Takahata replied that this also required a definition but suggested that a household income of one million dollars, potentially from dual incomes, could be discussed further with the research company while indicating that separate levels of targeting would be reviewed with the company.

Mr. Choy asked whether there were statistics on affluent travelers among the 1.9 million Japanese tourists who had previously visited Hawai'i. Based on earlier definitions of affluence, Mr. Takahata responded that such data might exist. He suggested that relevant information might be available from research conducted by banks and credit card companies.

Mr. Choy proposed a hypothetical scenario involving 200,000 affluent travelers and asked about marketing costs per traveler, given subsequent marketing strategies once relevant data had been collected and target groups identified.

Mr. Takahata replied that he understood that Mr. Choy was asking about the possible return on investment, and in response to a further question from Mr. Choy, confirmed that the analysis assumed that affluent travelers would stay in high-value hotels.

In response to Mr. Choy's question about the timing of this initiative, Mr. Takahata stated that the marketing budget had been reduced from \$9 million the previous year to \$6 million for the current year. As a result, HTJ was now focused on covering as much of the market as

possible on a broad basis. Mr. Takahata pointed out that the additional \$300,000 allocation was an extra provision, and the team had been asked to determine how they would utilize such funds. He emphasized that previous budget constraints had not permitted research on affluent travelers, given that more nuance was required.

Mr. Choy asked whether the HTA Board would be informed if data revealed that the initiative would not yield sufficient returns to justify its expenditure or if a marketing campaign would not be worthwhile. Mr. Takahata assured him that the first step was to assess the potential of the initiative by acquiring and analyzing a database of affluent travelers and developing targeted initiatives. These findings would then be reviewed and discussed with the Branding Standing Committee and the Board. He confirmed that the initiative could be reconsidered if the analysis suggested that the returns were insufficient to justify the expenditure.

Mr. Choy observed that affluent travelers were likely to prefer different activities compared to average travelers and asked whether suitable activities had been identified. Mr. Takahata clarified that this was the purpose of "developing initiatives around this" and stated that Hawai'i activities appealed to affluent travelers. However, he emphasized that partners providing these services needed to do so at an optimal demand point. He added that one-off activities were insufficient to draw Japanese visitors to Hawai'i based solely on a single experience.

Mr. Takahata confirmed Mr. Choy's assumption that most of the affluent Japanese travelers were repeat visitors, stating that they had been informed by a number of their partners, including airline companies and credit card companies, that many high-affluent travelers had not revisited Hawai'i for approximately ten years. Mr. Takahata attributed this to these travelers' perception that there was no novelty in returning to the destination. He added that this emphasized the need for Hawai'i to reinvent itself for this market. He pointed out that the destination had undergone significant changes over the past decade and offered many additional experiences.

Mr. Choy asked for an estimate of the number of people involved, and Mr. Takahata responded that the figure was believed to be in the tens of thousands.

Chair Pfund intervened to limit the questioning and inquired whether the HTA would retain ownership of the database for future marketing initiatives once developed. Mr. Takahata confirmed that the HTA and the State would own the database.

Chair Pfund asked if there were any additional questions and thanked Mr. Takahata for his presentation.

7. Presentation and/or Discussion Regarding an Update on the Meetings, Conventions and Incentives Market Activity and Pace Report

Ms. Anderson introduced Ms. Lynn Whitehead, the Vice President of Global Sales Meetings, Conventions, and Initiatives (MCI) for the HVCB.

Ms. Whitehead noted that it had been some time since she had made a presentation to this committee and expressed her gratitude for their time. She greeted the committee and extended "a strong farewell" to the first quarter of 2025 while encouraging the HTA to approach the second quarter as an opportunity to reset, realign strategies, and face the moment. She added that the single-property team was set to become the primary driver of high-impact meetings for Hawai'i during the much-needed repair and renovation of the Hawai'i Convention Center (HCC) between 2026 and 2027.

Ms. Whitehead explained that the citywide team aimed to position Hawai'i for long-term success by shifting its focus to 2028 and beyond. She and Ms. Teri Orton, the General Manager of HCC, had frequently emphasized the importance of diversification for the success of the MCI business. They believed it was essential to contract a balanced mix of local and offshore groups across a range of market segments to bring business to all Hawaiian Islands, their partners, and stakeholders in high-end and mid-level sectors.

Ms. Whitehead expressed her belief that the closure of the HCC during 2026 and 2027 would present a unique opportunity to showcase the collaboration of the various sales teams for the benefit of the State. She added that the citywide, single-property, and client services teams had adopted an innovative approach to the MCI business by responding quickly, creating short-term compression, and fostering a sustainable future for the Hawai'i meetings industry. Ms. Whitehead acknowledged challenges, such as the need to rebuild trust among the groups with definite and tentative bookings for 2028 and instill confidence in their decision to move forward with Hawai'i. This was critical for staying on track for the January 2026 commencement of construction, which would set the stage for teams to sell future years with certainty.

Ms. Whitehead stressed that launching a robust marketing and communications initiative would be essential once construction began. This initiative included creating a newsletter for monthly project updates posted to their website, holding quarterly town hall meetings open to all tentative and contracted clients, and providing updates from project management and leaders in the local hospitality industry. Ms. Whitehead believed that grassroots efforts in key markets would also be necessary to keep Hawai'i top of mind and to share progress visibly and consistently.

Ms. Whitehead acknowledged that the single-property team faced challenges, particularly

competing against destinations offering significant financial incentives to win business. She had been informed that several convention centers had experienced difficulties and were to close, with businesses being attracted to the destinations by their single-property teams during the closure of the convention centers.

Ms. Whitehead informed committee members that her presentation slides were to be very detailed, intending to serve as a resource for the remainder of the year, not just for the current day's discussion. She stated that her narrative would focus on key highlights while the complete set of slides would remain available for reference.

Ms. Whitehead reviewed the role of Meet Hawai'i, describing it as a collaboration between the HCC and Hawai'i Visitors and Convention Bureau (HVCB) that positioned the Hawaiian Islands as a premier destination for MCI business. She reminded committee members that HVCB generally managed activities outside the HCC building, while HCC oversaw activities within the building.

Ms. Whitehead explained that the HVCB's MCI global sales team was responsible for booking groups at HCC more than 13 months before arrival. The single-property team oversaw hotel meetings on all islands, while the services team assisted planners with transportation and pre- and post-event arrangements for outside events at destinations across all islands. The HCC events management team facilitated all services within the building, including food and beverage, audiovisual needs, telecommunications, and other arrangements. The HCC team also managed bookings for local groups within 13 months of arrival.

Ms. Whitehead outlined the responsibilities of the three specialized teams:

- The citywide team focused on the HCC.
- The single-property team concentrated on hotel-only groups.
- The client services team ensured the groups had a positive experience.

Ms. Whitehead also defined several technical terms used in reports:

- **Booking or Event Cycle** was the timeline from initial client engagement to event execution, encompassing the period between receiving the initial RFP and securing the business. This timeline varied based on meeting size, with corporate groups typically booking closer to the event date than associations.
- **Future Pace** was defined as a measure of room nights and a number of events booked for future years. This metric indicated whether sales were ahead of or behind those years.

- **Targets and benchmarks** were not identified as goals. Instead, these figures were calculated based on historical averages of previous years, specifically the pre-pandemic years of 2017, 2018, and 2019. These benchmarks served as guideposts to help the sales team determine whether their booking pace was on track. Ms. Whitehead reminded committee members that, in future presentations, she intended to include criteria related to attendance, economic impact, and additional metrics, such as food and beverage and rental performance. Benchmarks were designed to ensure the team booked the right business for the HCC while aligning with food and beverage and rental goals.
- **Production goals** represented the number of committed events and room nights the team aimed to achieve in future years, including tentative and definite bookings. Production goals were consistently set higher than benchmarks to motivate the team toward higher-impact results. The economic impact on the State of the MCI business was a key measurement provided by the Department of Business, Economic Development, and Tourism (DBEDT) each August, reflecting data from the preceding year. Ms. Whitehead commented that in 2024, the economic impact on the State of visitor spending was more than \$1 billion.

Ms. Whitehead highlighted the team's 2024 production achievements. The citywide team had achieved 114% of its tentative goal, and the new team had demonstrated strong momentum despite definite bookings declining by 10%. Ms. Whitehead attributed this to staffing levels that had been fully restored only midway through the year. She added that, by the end of the year, single-property sales had been on pace for 2025 and 2026, while the citywide team had successfully brought 2028 back on track.

Ms. Whitehead explained that there has been a change in national booking trends in recent years. Single-property groups (hotel-only bookings) now scheduled meetings between 6 to 18 months before arrival, with many booking meetings in the same year they took place. On the other hand, citywide groups (HCC-related businesses) typically scheduled meetings from two to five years in advance. Ms. Whitehead added that although the booking window had tightened in the post-pandemic environment, the team had successfully secured several in-the-year-for-the-year (ITYFTY) bookings, with notable contributions from the Asia Global Sales Team. For example, Daito had recently finalized their license agreement for an event planned for August 2025.

Ms. Whitehead commented that she often consulted reports from 2synergize (2s), a specialized agency within the destination marketing organization (DMO) space to which the HVCB belonged. These reports offered statistics and comparative analyses of booking cycles across destinations, categorizing cities according to the size of their convention centers.

With an exhibit space of 204,000 gross square feet (GSF), the HCC was placed in Category C, comprising 48 destinations with exhibit spaces ranging from 100,000 to 499,000 GSF.

Ms. Whitehead noted that HCC trends aligned with national patterns, and bookings at the HCC were consistent with those at other midsize centers across the U.S. Most bookings for 2027 had been made in 2023 and early 2024, with 11 tentative bookings in progress. However, geopolitical concerns had caused a slowdown, shortening the booking window for Hawai'i and affecting the 2027 pace, hence driving plans to shift momentum toward future years.

Ms. Whitehead acknowledged that citywide business was expected to be impacted by the extended closure of the HCC. Prior to this extension, the team had been ahead of pace, with 12 definite bookings expected to generate \$339 million in economic impact and 11 tentative events projected at \$343 million. The team made strenuous efforts to retain these groups by rescheduling their events for future years or by identifying alternative venues within Hawai'i. Although outcomes were not expected until the end of the second quarter of 2025, the team hoped to retain five groups in Hawai'i in 2027 by redesigning their programs to distribute activities across multiple hotels. She thanked Mr. Choy and Ms. Orton for quickly confirming parameters regarding the 2027 groups, ensuring a rapid response to inquiries following news of the extended closure.

Ms. Whitehead pointed out that transparency was the priority for groups needing relocation, followed by assistance to find alternative venues for their 2027 programs. Another key objective was to mirror the terms of their 2027 contracts and preserve the integrity of the work done on behalf of the destination, transferring the contracts to viable future years. Ms. Whitehead acknowledged Ms. Orton's initiative in addressing these issues.

Ms. Whitehead explained that the activities of the single-property team had been leveraged to address shorter-term gaps in 2026 and 2027. The team had targeted corporate groups capable of rapid decision-making while also striving to secure larger associations that could utilize the capacity of major hotel properties.

Ms. Whitehead highlighted that the MCI teams had not only created business valued at nearly \$1 billion in future economic impact but also provided a robust foundation for strengthening strategies over the following two years. She emphasized the importance of maintaining the marketing flexibility fund (MFF), noting that 95% of competitors offered financial incentives to finalize deals. She reiterated that the MFF had been significantly reduced since the pandemic and was nearing its limit for most future years. In the future, this fund is likely to be critical in keeping Hawai'i competitive during the final stages of negotiations.

With respect to the current booking pace and strategies for resetting moving forward, Ms. Whitehead presented a bar chart detailing the eight-year future pace for citywide room nights and including "on the books" (OTB) bookings, tentative bookings, current pace targets, and the final five-year average. She explained that "pace" referred to the tracking of room nights and numbers of events booked in future years and served as an indicator of whether the team was ahead of or behind future goals and targets. The graph illustrated that, at 113%, they were slightly ahead of pace for 2028, but Ms. Whitehead emphasized the importance of staying focused to maintain this pace, as bookings needed to be confirmed within the next month. She identified 2029 and 2031 as significant "Need Years" for the team. For 2027, at 207%, the outlook would resemble 2026 as groups shifted into future years. She noted that 2028 remained their short-term goal.

Ms. Whitehead also presented a chart showing the booking pace for 2028 and stated that there were seven contracted groups on the books compared to a pace target of six, exceeding the target by one group. She commented that for 2029, however, there were only three groups on the books, two fewer than the target.

Ms. Whitehead presented a bar graph illustrating the single-property team's booking pace, noting that the chart focused on a three-year outlook since the single-property business had a shorter booking cycle. She commented that the single-property team was on track for 2025 and had recently launched an incentive campaign to boost production for 2026, with a campaign for 2027 under discussion. She presented a tabulation of single-property definite bookings by island, with 32,000 contracted room nights representing an economic impact of \$48 million. Ms. Whitehead commented that Maui led in production and stated that, while acknowledging Maui's significant growth due to extensive efforts, the team was determined that all islands should succeed. Ms. Whitehead added that Maui production showed a significant increase compared with the previous year's total of only 1,327 contracted room nights.

A tabulation of the tentative production of Meet Hawai'i projected a potential economic impact of nearly \$1 billion, and Ms. Whitehead emphasized the importance of maintaining a strong pipeline moving forward. Subsequent slides demonstrated definite production of Meet Hawai'i, comprising 26,000 total room nights and \$54.7 million in economic impact. Ms. Whitehead acknowledged that the citywide team had faced challenges during the first quarter of 2025 but had since reset their strategies to focus on creating more opportunities and closing tentative bookings.

Ms. Whitehead elaborated on the citywide team's strategies and added that 2028 was likely to be a strong year for the team. She added that single-property bookings were stable for 2025 and 2026 thanks to incentive programs launched earlier in the year. A campaign for

2027 was under development, with the aim of targeting larger meetings capable of creating compression and offsetting the HCC gap. Ms. Whitehead explained that the citywide and single-property teams endeavored to align their strategies, share leads, support conversion efforts, and initiate grassroots efforts in their markets.

Ms. Whitehead reviewed the major initiatives for 2025 that had been shared during the HTA's tourism update the previous month. She provided a list of key programs and strategies. She emphasized the Meet Hawai'i team's strength, enthusiasm, and commitment to welcoming groups back to the refreshed and repaired HCC in 2028. She thanked committee members for the opportunity to share updates on Meet Hawai'i and looked forward to a close collaboration between the HCC and the HTA in the future. She invited questions from committee members.

Mr. Choy commented on the disparity between single-property and citywide numbers, questioning why the hotels did not cover the costs of MCI. He suggested that hotels rather than the HTA benefited directly from single-property groups and asked why they did not assume these expenses.

Ms. Whitehead emphasized the importance of diversification to maintain a balanced mix of several types of groups. She explained that the single-property business complemented citywide business well and emphasized the need to boost single-property production strategically during the HCC's closure in 2026 and 2027, particularly by filling larger hotels and pursuing short-term opportunities for corporate groups given the shorter single-property booking cycle.

Mr. Choy remarked that citywide operations appeared to incur losses, whereas single property must generate gains; otherwise, the hotels would not pursue them. He sought clarification from Ms. Whitehead, who acknowledged his point and noted that the building's benchmarks for food, beverage, and rentals were being created. She explained that the HVCB provided financial incentives to drive bookings for single-property groups, although these incentives were offered only as a last resort to secure business.

In reply to a question from Mr. Choy about whether hotel businesses maintained dedicated single-property marketing teams, Ms. Agas confirmed that hotels employed sales teams focused on specific market segments, one of which was MCI. She highlighted the necessity of maintaining a balanced mix to build business for future years and reiterated that economic benefits extended beyond the State to encompass other activities such as food and beverage provision and transportation companies.

In response to a question from Mr. Choy concerning the renegotiation of leases, Ms. Agas indicated that there were broad benefits for all stakeholders.

Chair Pfund reminded committee members that activities associated with the HCC meetings contributed to tax revenues and numerous other economic activities. He noted that conference attendees often booked accommodation in local hotels, reinforcing the interconnected nature of economic activities.

In response to an invitation to comment from Chair Pfund, the CEO of the HVCB, Mr. Tom Mullen, stated that it was important to understand that all enterprises, including the HCC, had performed well during 2017, 2018, and 2019. However, everything had shut down when COVID-19 struck, and the timeline for the return of the meetings business remained uncertain. Mr. Mullen commented that, as a result, the primary goal had become filling HCC and rebuilding market demand. He explained that the HCC's objectives were now different, focusing on reducing free rentals and increasing food and beverage revenue. He believed that a more classical approach could be adopted in the future by prioritizing the most profitable groups for the HCC.

Regarding single-property bookings, Mr. Mullen noted that meeting planners frequently approached the HVCB for hotel options to present to clients rather than contacting hotels directly. The HVCB provided the necessary information to help planners match groups to suitable hotels, attracting the types of visitors required, whether free independent travelers (FIT), corporate gatherings, or Japanese travelers. Each group had distinct per-person per-day (pppd) requirements, which needed to be maximized. Mr. Mullen reminded committee members that the HCC had shut down in 2020 with no certainty as to when it would reopen and had begun to fill and rebook over time. He emphasized that they were now positioned to take a tactical approach to bookings, which aligned with Ms. Whitehead's focus on intermediate strategies to mitigate the impact of the HCC's closure in 2026 and 2027.

Mr. Choy asked Mr. Mullen whether he agreed that, from the HTA's perspective, the HCC should no longer function as a loss leader and should benefit from the profits seen by other properties.

Mr. Mullen responded that he would be pleased if the HCC could reach the point of either breaking even or becoming profitable, but, while noting that this possibility was supported by everyone, he cautioned against drastic changes, advocating instead for a gradual approach to achieve this goal.

Mr. Choy remarked that the HCC had been in operation for 25 years and had only made a profit once. He added that even during 2017 and 2018, the HCC had operated at a loss, and he expressed satisfaction with Mr. Mullen's agreement that the formula should be revised.

Ms. Whitehead commented that not all opportunities were equally profitable, but some that appeared not to meet all criteria should be balanced with more profitable

opportunities to ensure alignment with Ms. Orton's strategy and the benchmarks established by the HTA.

Vice Chair Paulson recommended that the team return with a clearer visual representation of their strategies, particularly about plans for the full reopening, possible modifications, and future directions.

Mr. Choy reminded the committee of the importance of focusing on the bottom line.

Chair Pfund thanked Ms. Whitehead and proposed moving to the next agenda item, stating that the subsequent two items would be addressed in the executive session. He asked AG Cole to define the reason for entering the executive session.

AG Cole clarified that a motion and a second were required to proceed into the executive session. He explained that the session was justified under HRS §201B-4(a)(ii) to allow the committee to receive information that needed to remain confidential to protect Hawai'i's competitive advantage as a visitor destination.

Vice Chair Paulson proposed a motion to enter the executive session to discuss Agenda Items 4 and 6. Ms. Agas seconded the motion.

Chair Pfund invited further discussion or objections and, hearing none, declared that the motion had passed unanimously.

4. Presentation and/or Discussion on the 2026 HTA Marketing Plan ***

6. Update on the U.S. Maui Emergency Marketing Campaign ***

8. Adjournment

The committee resumed the regular session at 3:10 p.m. Chair Pfund reported that the committee had discussed Agenda Items 4 and 6, and no decisions had been made.

The meeting adjourned at 3:12 p.m.

Respectfully submitted,



Sheillane Reyes
Recorder

4

**Presentation and/or Discussion of 2026 Brand
Marketing Plans for USA, Canada, Japan,
Oceania, Korea, China, Taiwan, and Europe
Leisure Markets, and Global Meetings,
Conventions and Incentives*****

2026 Branding Marketing Plan Europe

2026 BRAND MARKETING PLAN



HAWAII TOURISM™

EUROPE

HAWAII TOURISM™

EUROPE

TEAM



Amy Thomas
Account Director



Julia Rohrbacher
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Account Manager
United Kingdom



Sabrina Hasenbein
PR Manager
Germany / Switzerland



Joanna Cooke
PR Manager
United Kingdom

WHO ARE WE TARGETING?

HAWAII TOURISM™

EUROPE

WHO ARE WE TARGETING?



Ethical Explorers (Ages 28-45)

- 83% say sustainable travel matters
- Seek authentic engagement and cultural immersion, avoid overtourism
- Why? Spend more, stay longer, respect culture



Wellness Seekers (Mid-30s to 60s)

- 56% prefer health-conscious holidays
- Spa treatments, spiritual / retreat experiences, physical exercise
- Why? High spend, premium / unique experience seekers



Conscious Families (Affluent Millennials)

- 70% seek cultural experiences for children
- Values-based travel, adventure, bonding opportunities
- Why? Multi-generation spend, educational investment, repeat visitation



TRADE & PR STRATEGY

TRADE

- Trade training and education
- Content enhancement – websites and brochures
- Market presence – trade shows, events and FAMs

PR

- Strategic communications (12 targeted releases)
- Customized media stories
- Relationship building
- FAM trip programme
- Crisis readiness



'ŌLELO HAWAI'I

Q1-Q2: Cultural Campaign

TIMING: March / April

MARKETS: Germany / UK

- Awareness – Consideration - Conversion strategy (TO partners)
- Digital campaign - precision targeting
- Cultural heritage and Hawaiian language focus
- Targeting *Ethical Explorers*
- Aligned with British Museum exhibition

ONE 'OHANA, FOUR STORIES

Q3-Q4: Experience Campaign

TIMING: October / November

MARKETS Germany / Switzerland / UK

- Multi-faceted, digital TO partner campaign
- Showcasing each island's unique 'āina (land) and kai (sea) personality
- Targeting *Wellness Seekers* and *Conscious Families*

Innovative Creative Formats

1. Swipe-to-Reveal Concept

This concept highlight different locations in Hawai'i based on "either / or" selection. Users click on the selection to reveal a bespoke content frame with detail.

2. Multi -frame with Video

Ideal for multiple messages, with video and options for multiple promotion to a variety of experiences / islands. Final frame can also be utilized for additional messaging.

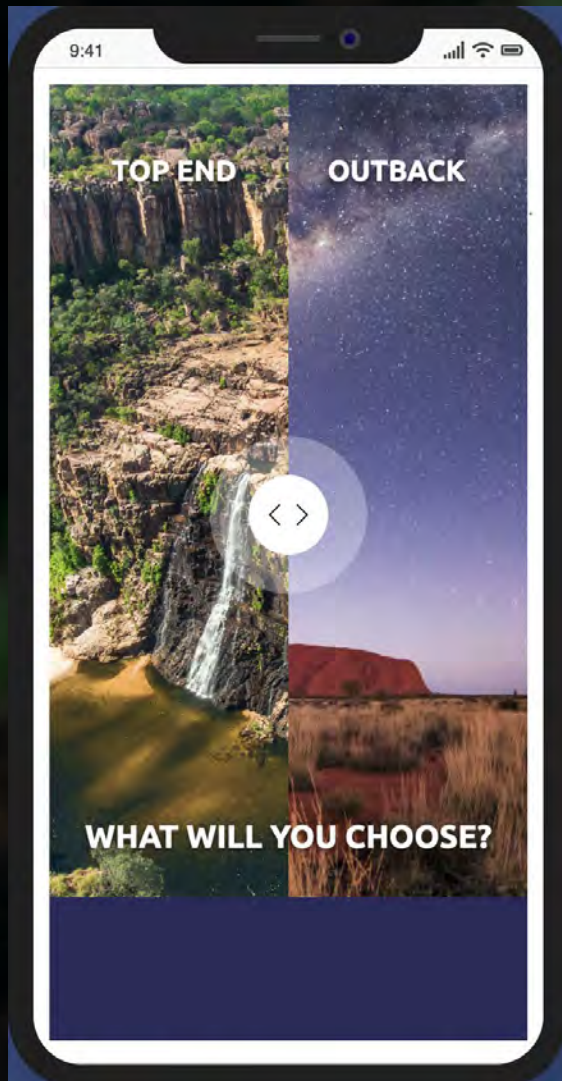
3. Hawai'i Island Grid Format

A flexible multi experience or multi-island grid format that can be used to showcase islands, experiences and partners.

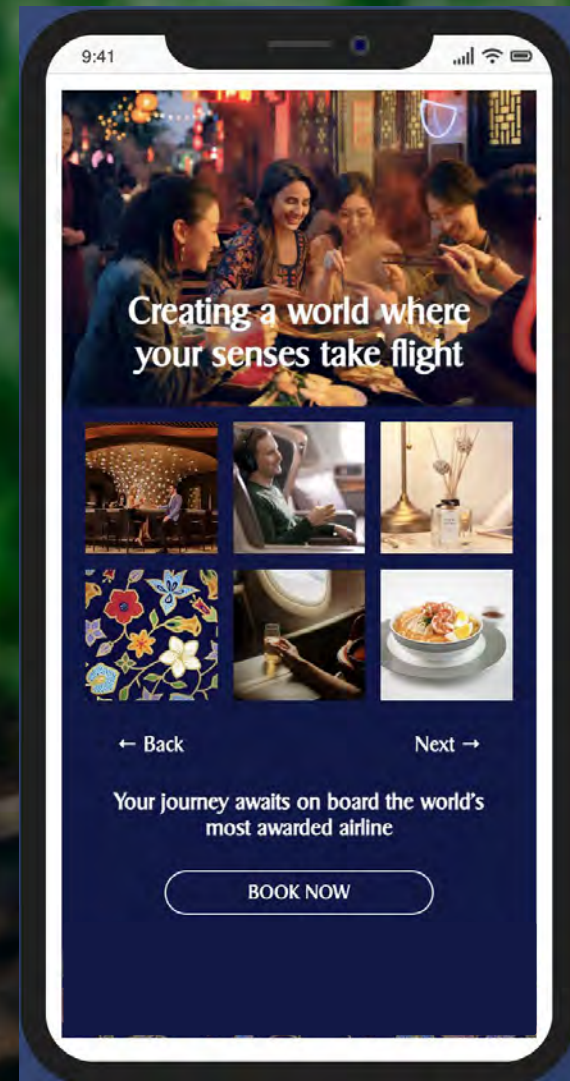
4. Interactive Video Format

Allows the user to choose the content to feel like they are in charge of the narrative. Messaging is clear and can be defined for TO partner.

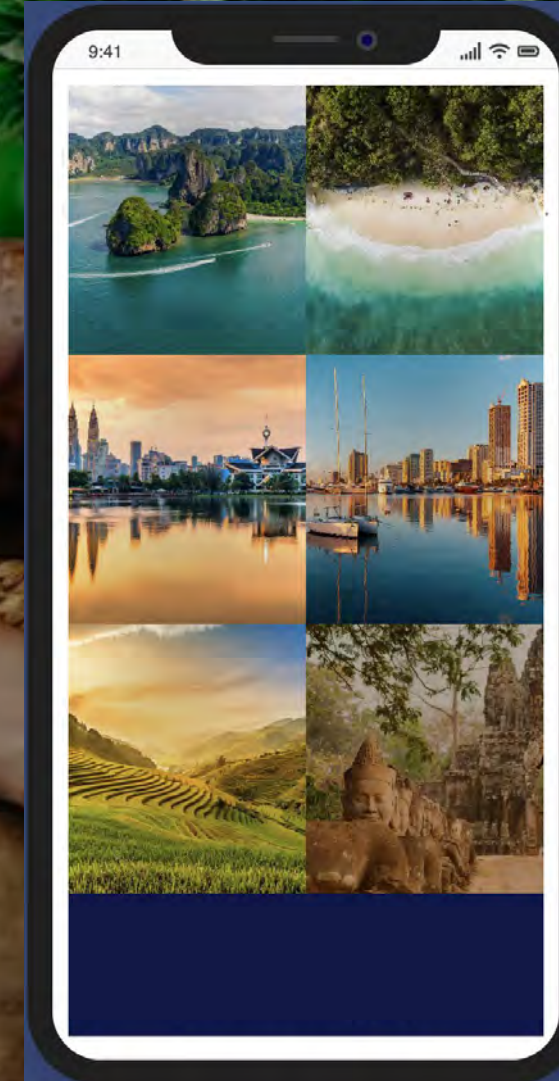
Innovative Creative Formats



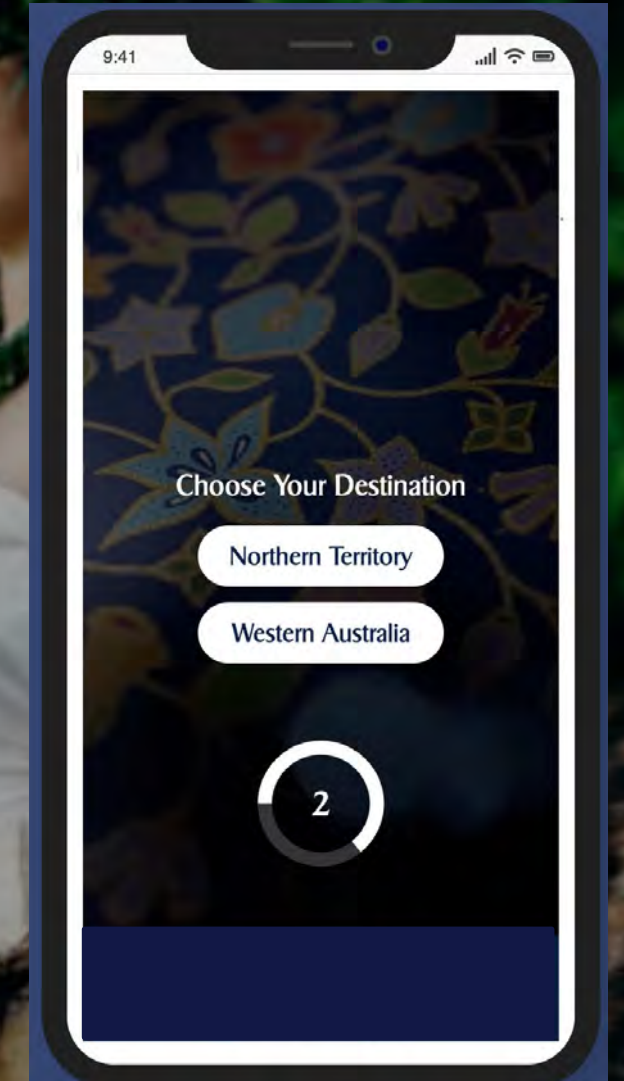
Swipe-to-Reveal



Multi-frame Video



Island Grid Format



Interactive Video

ALOHA! SALES MISSION

Q3: Trade and Press

TIMING: Early September

MARKETS: Germany / United Kingdom

- Frontline sales training in Frankfurt, Hamburg, London and Manchester
- Product manager meetings in Frankfurt and London
- Press events with hand-picked media in Hamburg and London

2026 MAJOR ACTIVITY TIMELINE

Q1 Jan - Mar

- ‘Ōlelo Hawai‘i – Consumer Campaign (Mar/Apr)
- UK British Museum Partnership (Jan-May)

Q2 Apr - Jun

- Trade Sales FAM - Pan European (Jun)
- UK Group Content Creator FAM (Apr/May)

Q3 Jul - Sept

- Aloha! Europe Sales Mission (Sept)
- Germany Co-Op Campaign (Sept/Oct)

Q4 Oct - Dec

- One Ohana, Four Stories - Consumer Campaign (Oct/Nov)
- Germany / Switzerland Group Media FAM (Sept/Oct)
- Trade Sales FAM
- Pan European (Nov)

YEAR-ROUND

Trade Training Program, Trade and Media Outreach, Press Releases (12), Event Representation, Website / Brochure Auditing, Product Manager Meetings and Trade Program Development.

WORKING TOGETHER



Support Trade and Press FAMs:

Showcase your product to the media and trade.



Join Our Sales Mission 'Ohana:

Gain visibility among Europe's most influential trade and press audiences.



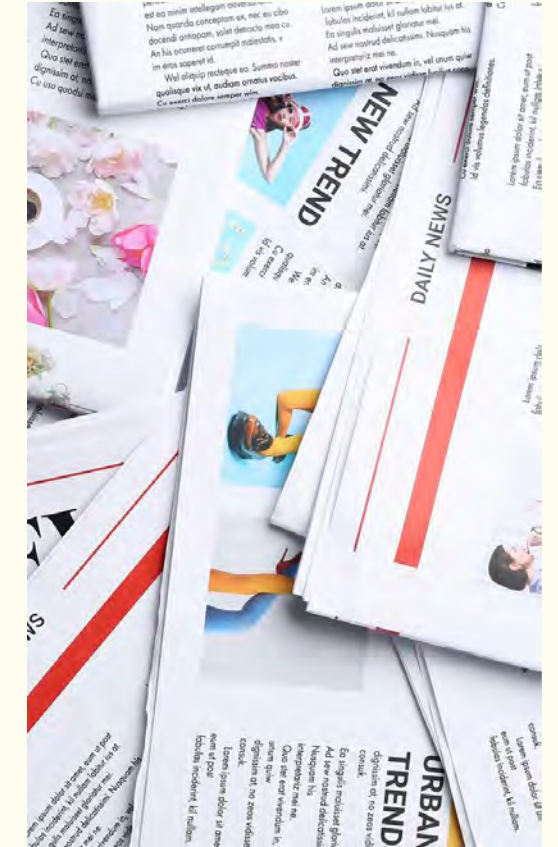
Connect With Our Partners:

Coordinate with TO partners to provide the strongest rates and updates.



Ask Us Your Questions:

Have a question or, spotted a trend ? Let us know...



Share Your News!

For HTE's trade newsletter, press releases, and LinkedIn page.

JRNY **America** AWARDS 2025

HAWAII TOURISM™
EUROPE

FINALISTS IN FIVE CATEGORIES

- Destination of the Year
- State Conservation Award
- US State of the Year
- Best Conservation Initiative -
Surfrider Kaua'i – Ocean Friendly Visitors Program
- New Tourism Initiative -
Recovery & Resilience Initiative (Maui)

MAHALO NUI LOA!

HAWAII TOURISMTM
EUROPE

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2026 Branding Marketing Plan Oceania

2026 Brand Marketing Plan Oceania Market



OUR TEAM

Jacqui Walshe
CEO and Managing Director
The Walshe Group

Darragh Walshe
Brand Leader

Jennifer Gaskin
Chief Marketing Officer

Anna Riedel
Project Manager

Maree Robinson - Olsson
Tourism Marketing Specialist

A person with curly hair is seen from behind, holding a large wooden surfboard. They are standing on a beach looking out at the ocean under a cloudy, sunset sky. A semi-transparent blue rectangle is overlaid in the center of the image, containing the text "TARGET AUDIENCE" in white capital letters.

TARGET AUDIENCE

CURRENT CUSTOMER

54.1%
REPEAT VISITORS

48
AVERAGE AGE

2.5
AVERAGE
PARTY SIZE

*Hawai 'i Tourism Authority, Monthly Visitor Statistics YTD June

OUR LOYAL CUSTOMER



Adventurous
experiences



Awe-inspiring
nature



Opportunities for
cultural
connection



Value for
money



THE NEW GENERATION
OF TRAVELER

YOUNG,
MINDFUL,
EXPERIENCE LED

WOMEN 50+



Culinary experiences



Luxe



Sustainability



Authenticity



Nature & wellness
experiences

The background image shows two women from behind, wearing traditional Hawaiian attire. They have dark hair and are wearing elaborate flower leis (necklaces) and matching flower headbands. The woman on the left is wearing a lei with red, yellow, and green flowers. The woman on the right is wearing a lei with yellow and white flowers. They are standing outdoors, and a blurred background shows other people and warm, bokeh-style lights. A dark teal rectangular box is centered over the image, containing the text "UPCOMING PROGRAMS" in white, bold, sans-serif capital letters.

UPCOMING PROGRAMS



2026 KPIs OCEANIA

Total Arrivals
205K

+5.7%

Visitor Days
1.76M

+2.1%

Visitor \$
0.54B

+4.7%



TRADE

Co-ops
Luxury Escapes
MyHawaii
Qantas Hotels &
Holidays

Trade Hub Refresh

Wellness Trade Famil

Month of Lei
Roadshow
Auckland
Sydney
Brisbane
Melbourne

TRADE



CIRQUE DU SOLEIL
AUAU
HAWAIIAN AIRLINES

Webinars

Trade eDMS

Trade conferences

Visit/Brand USA

SELF FAMIL PROGRAM



ALOHA, HAWAII! DISCOUNT PROGRAMME

Are you ready to explore the Hawaiian Islands and gain a deeper understanding of the people and the place? Apply for the *Aloha, Hawai'i!* famil programme.

Hawai'i Tourism Oceania, with the support of Hawai'i's tourism businesses, extends an invitation to you, our valued travel trade partners, to experience The Hawaiian Islands on a self-famil.

What is the *Aloha Hawai'i* Discount Programme?

Aloha, Hawai'i! is a travel industry discount programme that allows you and your travel companion to curate your own Hawaiian itinerary through discounts generously provided by Hawai'i tourism businesses.

You choose when to travel (blackout periods may apply), which islands to visit and which experiences to enjoy. All at your own pace.

Once you return from your trip, we'll ask for your feedback on what you liked and where you think we could improve.

Apply Now

First name*

Last name*

Email*

Mobile phone number

CONSUMER



BYRDLI Influencer
partnership

Duke's Day

Ocean Film Festival

Consumer eDMS
& social media



MEDIA

International Traveller
content partnership -
Hawaiian Icons

Always on media
hosting

Media group famil -
focus on sports and
active adventure

Well Traveler content
partnership

THE NEW WAVE

Hawai 'i is famous for a lot of things: surfing, world -beating natural beauty, and a rich cultural history to boot. Tradition runs deep.

But the future is being forged by a new wave of creatives; a generation who have one foot in the past, but their gaze fixed firmly on the Hawai 'i they want to co - create. They are creatives, artists custodians and taste - makers.

Through a series of beautiful and personal profiles, we'll highlight the way these bright young things are championing culture and enriching their communities - and how travelers can support them with their adventures.



THE NEW WAVE

Adventure.com is backed by Intrepid Travel, leaders in responsible, regenerative travel. We propose forming a partnership between Intrepid Travel, Hawai‘i Tourism Authority and Hawai‘i Tourism Oceania to find the future tourism leaders of Hawai‘i.

This would run as a competition across the Hawaiian Islands for young people to pitch their new tourism product idea and the winner would receive a grant and mentorship from Intrepid and HTA to bring the idea to life.





PARTNERSHIP OPPORTUNITIES

1

Group trade famil

1

Group media famil

12

Trade, media and
consumers e -newsletters

12

Months of social media
content and updates

Co-ops

Luxury Escapes
Qantas Hotels & Holidays
MyHawaii

Webinars

We can host individual
webinars or by island or
theme

Visiting media

Please reach out if you're
interested in hosting
media



SEA CLEANERS 2025





MAHALO!

2026 Branding Marketing Plan Japan

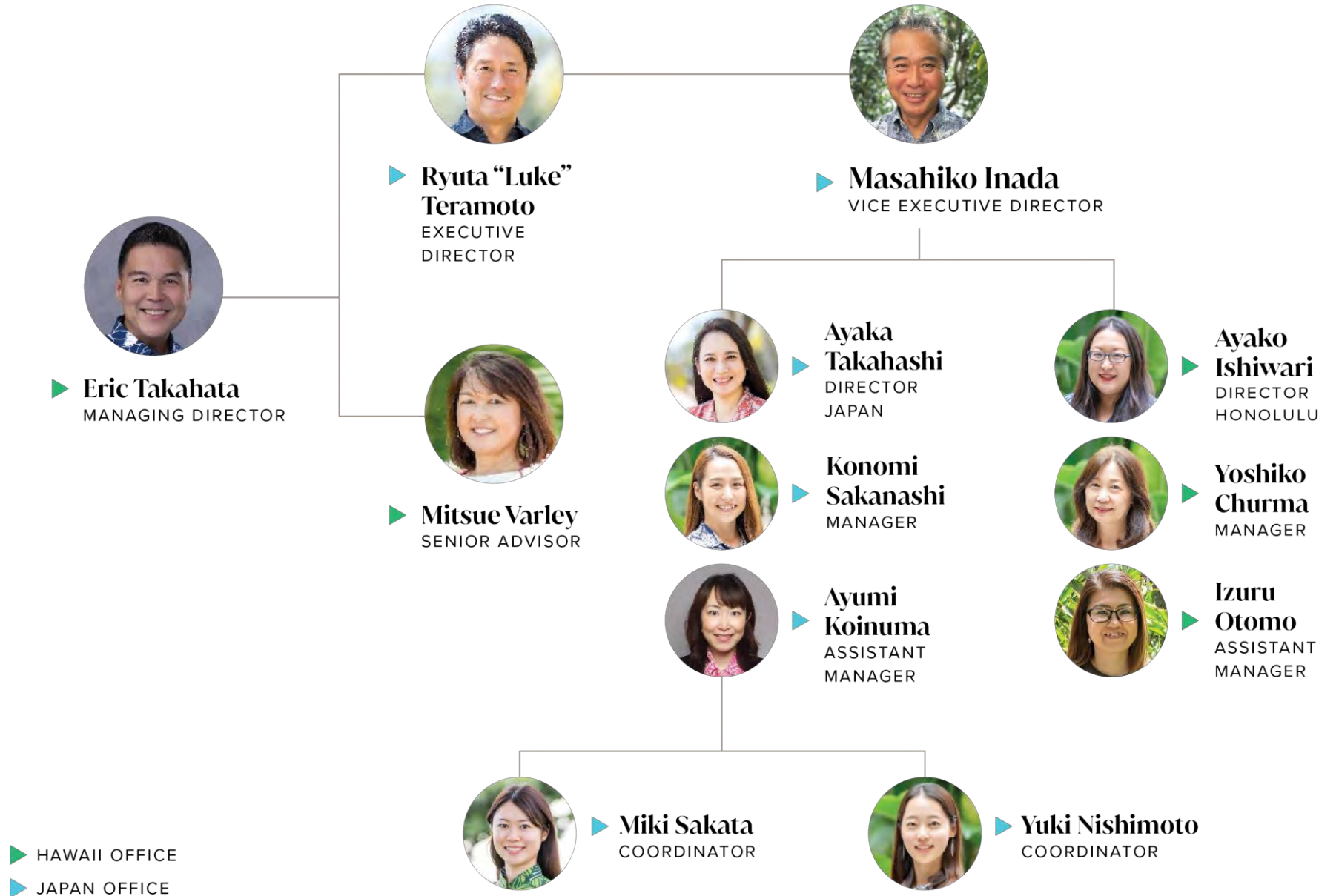


2026 Brand Marketing Plan Japan

Eric Takahata
Managing Director



Hawai'i Tourism Japan Team



Target Audience



Geographic Targets

Primary

- Kanto (Tokyo, Kanagawa, Saitama, Chiba, Ibaraki, Tochigi, Gunma)
- Kansai (Osaka, Kyoto, Hyogo, Nara, Shiga, Wakayama, Mie)
- Nagoya

Secondary

- Kyushu (Fukuoka)
- Chugoku (Hiroshima)
- Shikoku
- Tohoku
- Hokkaido (Sapporo)

Sister-Cities

- Hokkaido
- Okinawa
- Fukuoka
- Hiroshima
- Yamaguchi
- Ehime



Target Profiles



**Active Seniors
(60s–70s):**
Prosperous, time-rich,
multi-gen family
travelers



**New Wealth Class
(40s–60s):**
Entrepreneurs,
investors, lifestyle
hobbyists



**Power Couples
(30s–50s):**
Dual-income
professionals,
wellness-focused



Affluent Z (20s–30s):
SNS-natives, high
discretionary spend

Niche Audiences



Hawai'i Repeaters:
72% repeat rate; many
view Hawai'i as a
“second home”



Hula Market:
1.5–2M enthusiasts,
cultural ambassadors

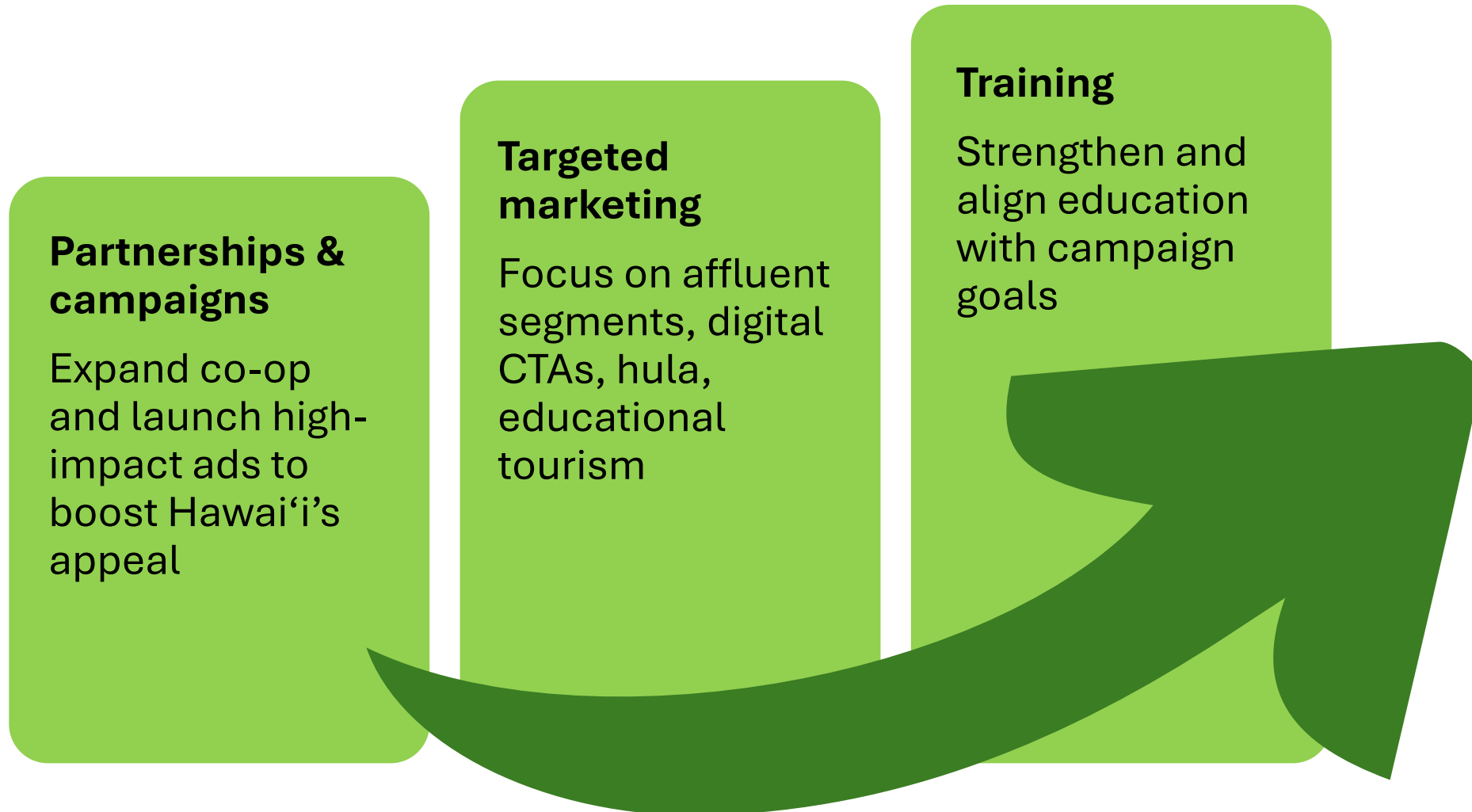


**Special Interest
Groups**
Pickleball, other niche
activities



Strategies & Tactics

Short-Term Booking Acceleration



Long-Term Growth



Brand management

Protect Hawai'i's brand strength amid resource constraints and global challenges (economy, geopolitical, U.S. sentiment)



Market growth

Promote neighbor islands; attract younger travelers and first-time visitors



MICE & partnerships

Collaborate with Meet Hawai'i; co-create with local partners



Content & media

Build sustainable owned media; deliver consistent, high-value content

A photograph of hula dancers in traditional attire, featuring long, flowing orange skirts with dark patterns and green leaf leis. The dancers are barefoot and wearing green leaf bracelets. The background is blurred, showing more dancers and greenery.

Consumer Education and Promotions

- Hawai'i's brand strong in Japan; bookings lag due to costs/global conditions
- Shift to innovative messaging to address obstacles such as exchange rate, high Hawai'i prices and negative U.S. sentiment
- Focus promotions on affluent market and repeaters; use digital targeting and partnerships to boost spending and neighbor island travel
- Growing hula community, a cultural channel for new and repeat visits



Travel Trade Training and Engagement

- Drive bookings via joint promotions with wholesalers, OTAs and airlines; expand routes and early customer acquisition
- Ongoing education through nationwide seminars, webinars and Aloha Program Satellite Offices courses ensure accurate Hawai'i knowledge among travel professionals
- Target educational and MCI travel through schools, government and Meet Hawai'i partnerships



A couple stands on a dark, silhouetted hilltop, looking out over a vast landscape of clouds. The sun is low on the horizon, creating a warm, golden glow that illuminates the clouds and the couple's silhouettes. The sky transitions from a deep blue at the top to a bright orange near the horizon. The couple is positioned in the lower center of the frame, with the man on the left and the woman on the right, both facing away from the camera.

Public Relations

- **Proactive PR:** Pitch targeted stories and build media partnerships
- **Communications strategy:** Drive industry recovery and short-term demand by targeting affluent, neighbor island and key segments (Active Seniors, Power Couples, Repeaters, Hula, etc.)
- **Owned media** will also expand and integrate with overall media plan

Island Distribution

- Expand promotion for Kona service resumption and Maui recovery
- Develop island-specific content for repeaters, first-timers, affluent, seniors and hula markets in collaboration with Island Visitors Bureaus and local partners
- Launch FAM trips for wholesalers, OTAs and educators to strengthen product development and grow both standalone and multi-island packages





Major Programs

Recovery Co-op



旅、はじめるなら
やっぱり
HAWAII

おもいきり、ご褒美はじめよう。
めいっぱい、観光行はじめよう。
無制限で、青春はじめよう。
全力で、恋はじめよう。
すべて忘れて、自分磨きはじめよう。

食べて、遊んで、学んで、癒えて。
取り戻すには十分すぎる、
色とりどりの体験がここにある。
誰にとっても、優しく、開放的で、安心して、
非日常な体験がここにある。

もう一度あの、眩いほどに輝ける
旅、はじめるなら、やっぱりハワイ。

HAWAIIAN ISLANDS

Airline, OTA, and wholesaler tie-ups to stabilize supply and boost bookings

HTJ x Expedia x VISA

ハワイ旅行もVisaで!

Visaカード決済で
ハワイのホテルが
12% OFF!

対象有効期限: 2024.9.1-2025.2.28
ご予約期限: 2024.9.1-12.15

VISA Expedia

HTJ x JTB

飛び出せ! 夏旅

HTJ x VELTRA

HTJ x HIS

HIS

ハワイの魅力を
最大限に引き出す
SALE FINAL

HAWAII

HTJ x HAL
x Arluis Wedding

GRAND OPEN
記念キャンペーン

ハワイでの結婚式をご検討中の方へ!

ゲストを含めた合計9席以上のお申込みで、
5割分をプレゼント!

さらに、先着で
ハワイアン婚装
ハワイ住民航空券を
新郎新婦様分プレゼント!

HTJ x ANA

ANAの機で
新しい思い出を

HTJ x JAL

JAL

SUMMER SALE

最大40,000円割引!
(1人1人)

A portrait of three elderly women of East Asian descent. The woman on the left has dark hair with grey streaks and is wearing a light grey jacket. The woman in the center has white hair and is wearing a light-colored, possibly white, jacket. The woman on the right has white hair and a mole on her cheek, wearing a brown jacket. They are all looking directly at the camera with slight smiles. The background is a solid, muted grey.

Active Senior Campaign

Because I'm old.



Time to enjoy because I'm old.

Age is just a number! I put myself first and enjoy doing what I love.
We propose a new kind of Hawai'i trip for seniors who feel the same.

Neighbor Island Promotion



Digital-first storytelling, influencer
FAMs, island-specific branding



Affluent Segment Initiatives



Tailored luxury campaigns for seniors, entrepreneurs, couples and Gen Z



Event Promotions



~100 annual Japan events (Hawai'i EXPO, department store fairs, hula festivals)

Japan Summit 2026



B2B event for planners and wholesalers; focus on product development and outbound recovery

Education Initiatives



Aloha Program, cultural blitzes, webinars and FAMs



Educational Travel Promotion (Groups)



Ministry of Education tie-ups; high school FAMs
positioning Hawai'i as a "treasure house of learning"

Mahalo

HAWAII TOURISM™

JAPAN

2026 Branding Marketing Plan Korea



2026 Brand Marketing Plan - Korea

Irene Lee
Country Director

WHAT'S DRIVING KOREAN TRAVELERS

Wellness & All-Inclusive

- 44% prefer all-inclusive packages
- 61% prioritize wellness and retreats in travel plans
- Rising demand for wellness-focused itineraries and healthy diet

Sports Themed Travel

- 48% Korean travelers aged 25-34 are planning trips around sports events in 2025

Authentic Experiences

- 73% visit local markets when traveling
- 69% prioritize nature-based experiences
- 48% Gen Z values immersive cultural activities

Digital & AI Influence

- Mobile booking reached 42.8% of total
- 68% influenced by social media content
- 20% now using AI for personalized itineraries

KOREAN TRAVEL BEHAVIORS

Travel Type



32%
Free
Independent
Traveler (FIT)

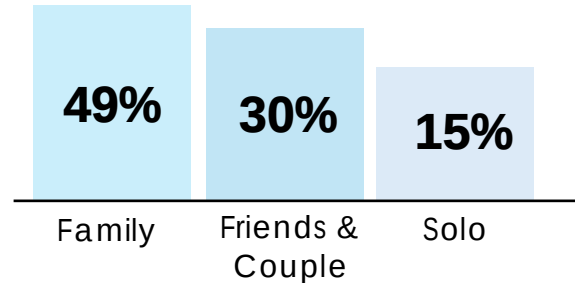


26%
Private
Group
Package

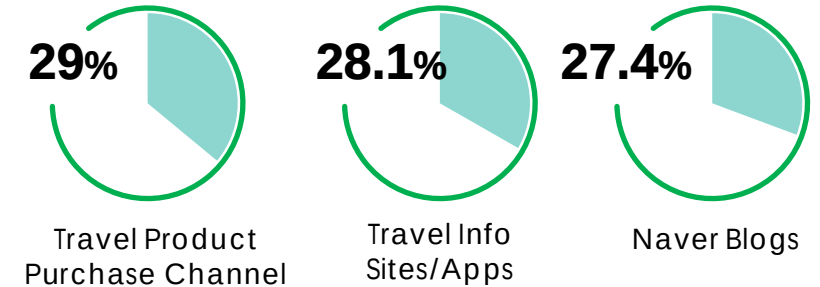


21%
Semi-
Package
(Air + Hotel)

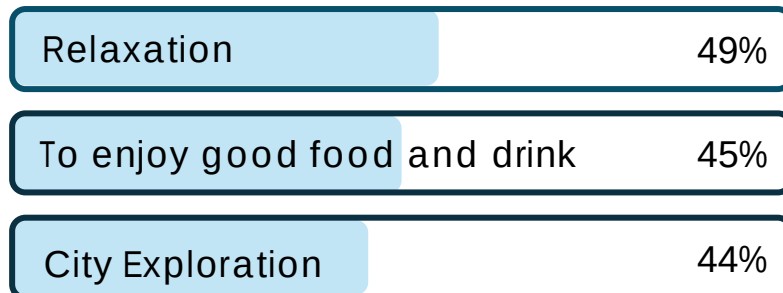
Travel Companion



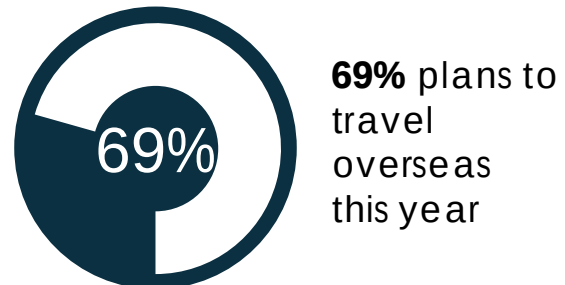
Travel Accommodation Info Channels



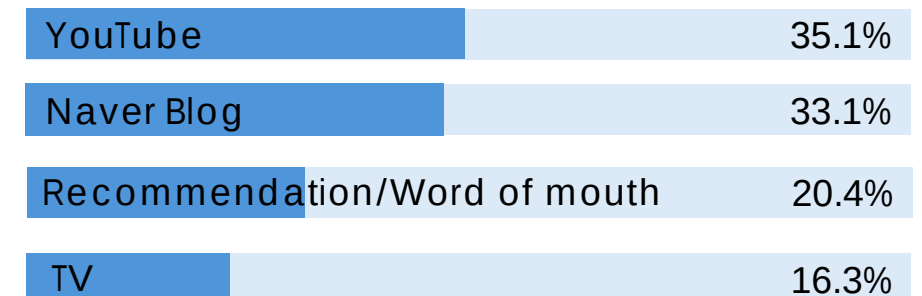
Main Travel Purpose



Travel Intentions

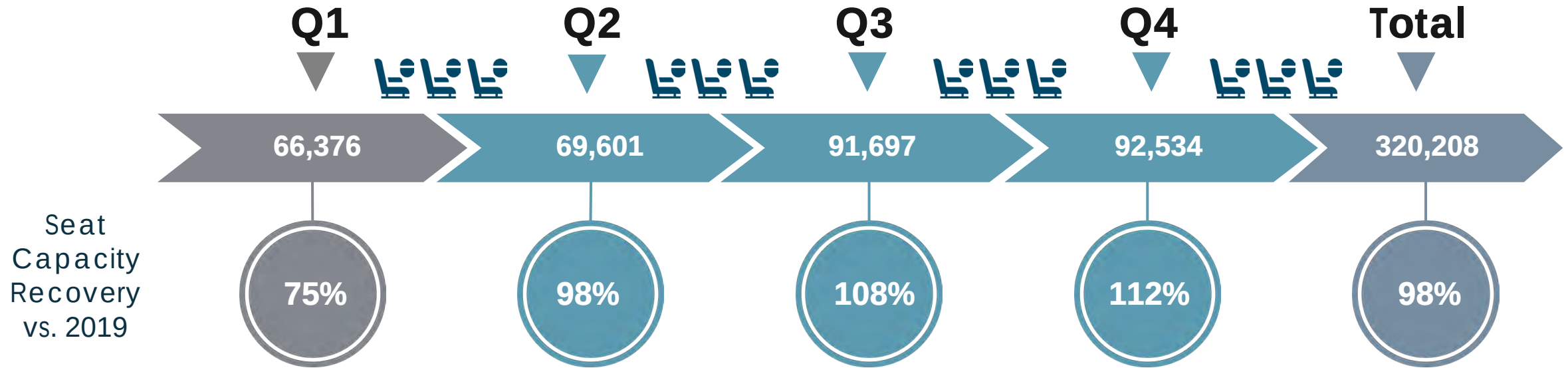


Overseas Travel Planning Info Channels



AIRLIFT TO HAWAII

98% Recovery of Pre-Pandemic Seat Capacity



Total Flights From
Korea (1,054)
vs. 2024 (923)

**14.2%
Increase**

Total Seats From
Korea (320,208)
vs. 2024 (278,982)

**14.8%
Increase**



SEOUL HONOLULU

18x Nonstop Service From Dec 2025, 16x From Mar 2026

Airlines	Frequency	Seats (Capacity)
 KOREAN AIR	7 Weekly	291 Seats (B787-10)
ASIANA AIRLINES	5 Weekly	301 Seats (B787-200ER)
 AIR PREMIA	4 Weekly to 6 Weekly (Dec 15, 2025 – Feb 22, 2026)	309 Seats (B787-900)

2026 BRAND MESSAGE

ALL WAYS HAWAI'I

Position Hawai'i as an endlessly inspiring, multi-island destination offering diverse cultural, natural, sports, and culinary experiences



ALL WAYS HAWAII BRAND STRATEGY



Comprehensive Appeal

Position Hawai'i as a multi-island destination offering diverse cultural, natural, sports, and culinary experiences



Showcase Versatility

Highlight the many ways to explore, enjoy, and connect



Dual Meaning

Build timeless appeal through the dual nuance of All Ways and Always

- All Ways = Diverse Experiences
- Always = Timeless Inspiration



Brand Identity

Strengthen with a unified, multidimensional message

TARGET AUDIENCE PROFILE

Primary focus – high value, mindful Korean travelers from Seoul Metropolitan Area and Busan-Gyeongnam Area with:

- Household incomes of \$70,000+
 - Double incomes exceeding \$100,000
 - Interest in premium experiences and cultural immersion
 - Tendency to plan and research extensively before booking
-
- Mainstreamers (20s – 60s)
 - Romantic Couples (20s – 60s)
 - Affluent Travelers (40s – 70s)
 - Outdoor Goers (20s – 60s)
 - Free Independent Travelers (FIT) (20s – 40s)



ALL WAYS HAWAII' CAMPAIGN (PART 1)

Signature Travel Promotion

- Develop signature festival/event travel products with trade partners
- Engage consumers with festival-focused content and campaigns to highlight Hawai'i's unique cultural experiences
- Collaborate with Korean fitness influencers in neighbor island marathons to showcase natural beauty and communities

Mindful Travel Promotion

- Collaborate with trade partners to promote mindful travel rooted in cultural appreciation, nature preservation, and community respect
- Host media fam tours to highlight regenerative tourism
- Partner with conscious brands to engage consumers through initiatives on zero-waste, ethical consumption, and community engagement

Made-in Hawai'i Promotion

- Partner with retail and F&B brands to showcase Made in Hawai'i and Hawai'i-inspired products, creating engaging consumer events and digital campaigns that foster emotional connections to Hawai'i



Objective

Position Hawai'i as "Always Inspiring, Always Hawai'i" — a multi-island destination of endless culture, nature, sports, and flavors.

ALL WAYS HAWAII CAMPAIGN (PART 2)

The Hawaiian Islands Promotion

- Strengthen trade/media ties through Travel Mission Korea & IPW 2026
- Organize neighbor island fam tours with airlines to enhance offerings for repeat and long-stay travelers
- Enhance expertise via webinars, roadshows, and Hawai'i Specialist Program
- Generate inspiring content with KOL digital fam tour
- Run #AllWaysHawaii campaign to spotlight culture, nature, and regenerative values

AI Travel Promotion

- Develop AI-customized travel products with OTA partners
- Host "Aloha Through AI" event to engage young consumers with trip giveaways



Expected Outcomes:

- ✓ Engage 200+ travel partners and host 30+ business meetings during HTM and trade roadshow
- ✓ Certify 20+ Hawai'i Specialists and deliver 2+ seminars with 100+ participants each
- ✓ Generate 1.8M+ media impressions
- ✓ Achieve 270K+ impressions and 80 posts via owned social media
- ✓ Attract 800+ attendees through consumer activation initiatives
- ✓ Produce 20+ KOL contents generating 200K+ impressions

YOUR ONE&ONLY HAWAI'I CAMPAIGN (PART 1)



Objective

Position Hawai'i as the premier destination for premium and romantic travel, offering high-end accommodations, exclusive activities and services

Premium Travel Promotion

- Boost ticket sales and high-value spending with airlines and premium shopping partners
- Develop all-inclusive long-stay products for affluent seniors
- Partner with credit card companies to target platinum cardholders with exclusive Hawai'i benefits
- Promote the Lotte LPGA Championship and host a KOL golf tour to showcase Hawai'i's golf experiences
- Collaborate with luxury brands, connecting culture, wellness, and premium experiences to reinforce Hawai'i as a premier travel destination.

YOUR ONE&ONLY HAWAI'I CAMPAIGN (PART 2)

Romance Travel Promotion

- Co-op with honeymoon specialty agencies to promote romance products
- Host romance fam tour with trade and planners to develop diverse products, including premium stays, wedding venues, and couple activities
- Integrate romance-themed content into media to position Hawai'i as an aspirational couple destination
- Co-op with influencers to create digital content that builds emotional connections and reinforces Hawai'i as the ideal place to celebrate love



Expected Outcomes:

- ✓ Generate 1.2M+ impressions through travel media channels
- ✓ Secure 20+ digital media placements via romance program integration
- ✓ Achieve 100K+ impressions via influencer collaborations
- ✓ Enhance brand visibility and inspire high-value travelers with aspirational content

PARTNERSHIP OPPORTUNITIES

Contact: HTK@aviareps.com

- Hawai'i Specialist Training Program
- Hawai'i Travel Mission in Seoul
- Neighbor Island Digital KOLs Fam Tour

- Neighbor Islands Trade Familiarization Tour
- Hawai'i Specialist Training Program

Q1

1

2

Q2

- Mindful Travel Fam Tour with Daily News Media
- Romance-themed Digital Content Creation with Influencers

Q3

3

4

Q4

- KOL Golf Fam Tour
- Romance Trade Fam Tour

KEEP CONNECTED WITH HTK



PHONE:

+82 2 777 0033



EMAIL:

htk@aviareps.com



ADDRESS:

#1128 Signature Tower, West, 100, Cheonggyecheon-ro,
Joong-gu, Seoul, 04542, Korea



WEBSITE:

www.gohawaii.com/kr

2026 Branding Marketing Plan China

2026 BRAND MARKETING PLAN

CHINA MARKET

DENNIS SUO
MANAGING DIRECTOR



MEET THE TEAM



Dennis Suo
Managing Director



William Zhang
*Director of Travel Trade
& Business Dev.*



Jasmin Li
*Sr. Manager
of Trade & Training*



Sarah Wang
*Director of Creative &
Social Marketing*

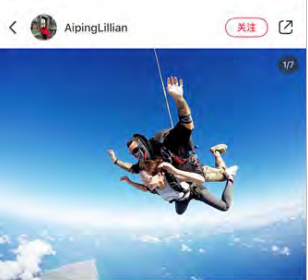


Virginia Lin
*Director of Marketing &
Strategy*

TARGET AUDIENCE



MILLENNIUM INDIVIDUALIST (MI)



夏威夷超酷超美跳伞攻略
旅行必体验的项目 夏威夷跳伞攻略来啦
👉👉👉👉👉
如果小伙伴们去夏威夷玩耍，那一定要去跳一次伞，不仅是因为夏威夷海岛的风景真的太美，也是因为夏威夷跳伞是全球！最！低！价！敲黑板，真的比其他任何一个地方都要便宜，真的不要太划算！👉👉
被马克吐温称为“大洋中最美的岛屿”的夏威夷，是旅游的天堂，夏威夷跳伞被称为世界最美的跳伞之一，特别是夏威夷欧胡岛的Drop Zone更是被誉为World most beautiful DZ（世界上最美的空落地）。
夏威夷跳伞目前只能在欧胡岛，（也就是夏威夷的首府，火奴鲁鲁）欧胡岛的跳伞公司目前有两家，分别为 SKYDIVE HAWAII和PACIFIC SKYDIVING，其中Pacifi Pacific skydiving有21000英尺的高空跳伞，这是不带氧气可以允许的最高跳伞高度。



少女心泛滥的夏威夷粉色酒店推荐 皇家夏威夷酒店
“The pink palace of the Pacific”
这家酒店真的到处都是粉红色，很多ins博主都打卡过，普通房型都是园景，粉色背景墙，房间设施有些老旧，毕竟是有90多年历史的酒店了。强烈推荐塔楼套房，阳台景色真的太美了。携程价格3500左右，酒店每天还有30美金左右的resort fee。



FAMILY



夏威夷 say "Yes, I do" in Hawai'i
夏威夷
很多情侣选择来夏威夷度蜜月，抽出一两天的时间拍摄婚纱照。
图中的YES IDO车牌是夏威夷注册有效的汽车牌照哦！
我的婚纱照看吗
姐妹们，来聊聊一拖二夏威夷亲子游吧！
去年感恩节在夏威夷过的，老大就想着想回来夏威夷，索性就决定圣诞节来夏威夷过了。我一个人带两个，老大女儿6岁，老二儿子22个月，可想有多难搞了吗……
因为是带孩子出来旅游，所以主题主要以孩子为准，我们8天在夏威夷，我定了4天在迪士尼主题酒店，后四天在



HIGH NET WORTH INDIVIDUAL (HNWI)



夏威夷 ■ 购物 ■ 爱马仕菜篮子18奶昔白金扣！性价比地克瑞宝
夏威夷有什么
Honolulu有两个大型购物地，Waikiki和Aie Moana
我住在Waikiki的Royal Hawaiian真的是字字中心！楼下就是Royal Hawaiian center，各种名牌店！
夏威夷|欧胡岛保姆级攻略 第一次去夏威夷怎么玩
欧胡岛是夏威夷所有岛屿中最繁华最有青春气息的一个，首府火奴鲁鲁也是从中国来夏威夷的必到之地，第一次来夏威夷的盆友一定要收好这篇啦。
玩
夏威夷

01

Desirability for
Island Destination

02

Accessibility 1st & 2nd
Tiers Cities

03

Disposable
Income

04

US Visa Issuance

THE FREQUENCY FRAMEWORK

→ ANCHOR MOMENTS

Leverage major Agritourism event, cultural festival (Merrie Monarch), sports event to build travel inspiration

Unique Culture & Events

→ ALWAYS-ON STREAMS

Maintain constant

Year- Round Digital Storytelling & Engagement



→ SEASONAL SPARKS

Promote eco friendly outdoor activities during key booking periods.

CNY, 2026 FIFA World Cup

→ CONVERSION BURSTS

Convert high-intent audiences

Tactical Offers & Trade Activations

SOCIAL MEDIA MARKETING



Goals

Boost engagement, inspire FITs, reinforce Aloha, mālama, ho‘okipa, kuleana.



Content

Long-form articles, short videos, influencer vlogs, events, Hawai‘i-made products, voluntourism



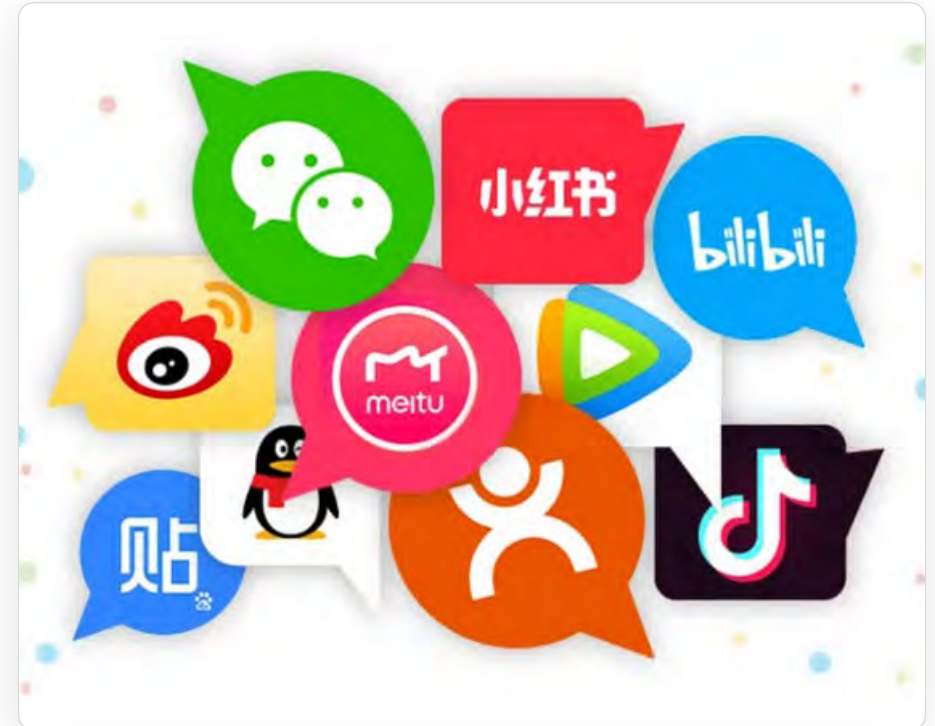
Influencer Collaboration

Multi-island self-driving tour vlog series (scenic routes, cultural stops, eco-conscious tips)



Tactics

Hashtags, mentions, cross-promotion; Localize GoHawaii.com; Embed Hawaiian values



Ma‘ema‘e
HAWAII STYLE & RESOURCE TOOLKIT

CORE MESSAGING

#邂逅阿罗哈·追逐梦想# - 夏威夷群岛 Discover Aloha, Live the Dream – The Hawaiian Islands

皮皮在蓝色星球 Following



跟夏威夷当地人一起 在农场里打滚儿

这几天一直晃荡在夏威夷的农场，跟这里农场主和农场家的小朋友一起聊天玩耍，感受当地的文化

如果您计划前往夏威夷旅行，
不要错过这段迷人旅程！
《‘Auana》
将带您进入一个夏威夷的奇幻世界……

OUTRIGGER威基基海滩酒店
(OUTRIGGER Waikiki Beachcomber Hotel)

与太阳马戏团娱乐集团携手合作，
为本地居民和游客呈现了一场
专为夏威夷定制的全新演出。

**这场极具现代、奇幻与冒险的演出
只有在夏威夷才能欣赏到！**



Ka'u Coffee

Ka'u地区的地理环境为咖啡的生长提供了绝佳条件。这里有人山土壤、适宜的降水、温暖和湿润的气候，使得咖啡豆能够充分吸收养分。

其次，手工采摘的方式确保每颗豆子在最佳成熟期时采摘。这种细致的采摘方法使得Ka'u咖啡在口感上更加细腻且层次分明，常带有巧克力、果仁和热带水果的香气。美国全国咖啡协会 (NCA) 和国际咖啡组织 (ICO) 对Ka'u咖啡都有较高的品质认证，体现了其在业界的认可度。



在夏威夷的日常生活中，
卢奥(Lū'au)是重要庆典的一部分，
这是一个关于文化、音乐和美食的
盛大庆祝活动。

夏威夷年度
顶级饕餮派对之旅
HAWAII FOOD & WINE FESTIVAL
欧胡岛+夏威夷大岛 8天



- 仅需一张门票……
- 即可与百位米其林烹饪大师，酒商面对面
- 无限畅享夏威夷本地食材烹制的极品美食
- 无限畅享夏威夷本地美酒佳酿

TRAVEL TRADE EDUCATION

- 01 Travel trade education sessions to major OTAs and wholesalers in 2026
- 02 Partner with US Embassy Beijing & Consulates for joint Trade Roadshows
- 03 Collaborate with airlines and OTAs for bundled PKG and joint social marketing



SHOWCASING EACH ISLAND'S IDENTITY

Muti-Island Standup Poster Design - 2026



Kuleana
社会责任

夏威夷大岛 · Hilo





Aloha
亲切问候

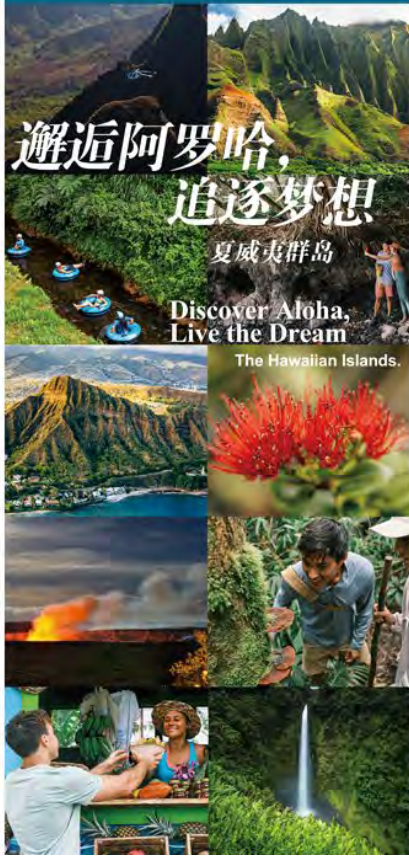
欧胡岛 · Leeward Coast





邂逅阿罗哈，
追逐梦想
夏威夷群岛

Discover Aloha,
Live the Dream
The Hawaiian Islands.





Ho'okipa
宾至如归

茂宜岛 · Molokini





Mālama'āina
关爱大地

可爱岛 · Nā Pali Coast



An aerial photograph of a dramatic coastline. The foreground shows a steep, reddish-brown cliff face with patches of green vegetation. Below the cliff, the ocean is a vibrant turquoise color, with white waves crashing against the base of the rock. In the distance, the coastline continues with more steep cliffs and a small sandy beach. The sky is blue with scattered white clouds.

MAJOR CAMPAIGNS

COFFEE MEETS CULTURE CAMPAIGN



Partnership

USDA, SHOB, Hawai'i Coffee Association, Synergistic Hawai'i Agriculture Council



Goals

Position Hawai'i coffee as premium souvenir;
Link to agricultural heritage, travel experiences



Tactics

Retail activations, Hainan Expo; Content on volcanic soil, family farms, sustainability.



Activities

FAM tour, workshop & tastings, Influencer vlogs/reviews



Impact

Drive spending, awareness; "Bring home a memory, not just a product."



ROAD TRIP INFLUENCER-LED CAMPAIGN



Collaboration

Hertz Rental Car for self-driving exploration



Structure

Season 1 (2026: **O'ahu & Hawai'i Island**);
Season 2 (2027: **Maui & Kaua'i**)



Content

Short-form vlogs on **scenic drives, cultural stops, local dining, sustainable practices**



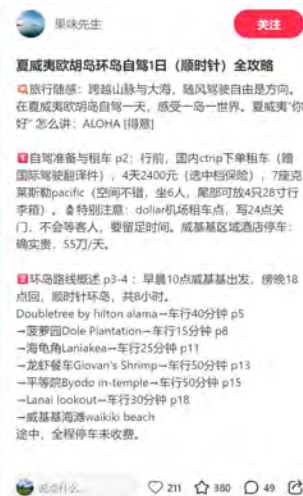
Objectives

Inspire FIT travelers (Gen Z/millennials);
Promote **accessibility, island uniqueness**



Tactics

Recommended **itineraries, rentals/deals**;
Embed **Mālama tips/messaging**



夏威夷欧胡岛 | 檀香山 | 最全旅游攻略

♥ Ala Moana Center 阿拉莫那购物中心
- 买买买和时髦精们必去, 大牌热门款几乎都有
货, sales tax 税比美国本土相当于打九折

RAINBOW ECO CAMPAIGN

- 01.** Eco-bag series with **7 rainbow colors**, celebrating **Hawai'i's diversity, people & nature**.
- 02.** **Sustainable** brown paper and linen design, **reverse use**
- 03.** **Evolution:** Duke Kahanamoku brown, Nāpali Coast blue, volcanic red/orange 'ōhi'a lehua
- 04.** Engage via social media quizzes and final contest: collect 7 colors for a **China-Hawai'i round-trip** (airline collaboration)
- 05.** Bring Hawai'i's diversity into daily life, boosting **eco-awareness** and **sustainable travel**



LNy WECHAT RED ENVELOPE CAMPAIGN

01. Red Envelopes symbolize good fortune

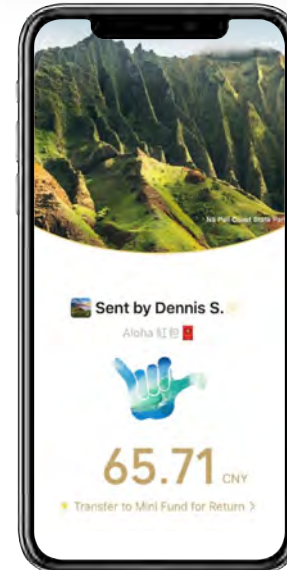
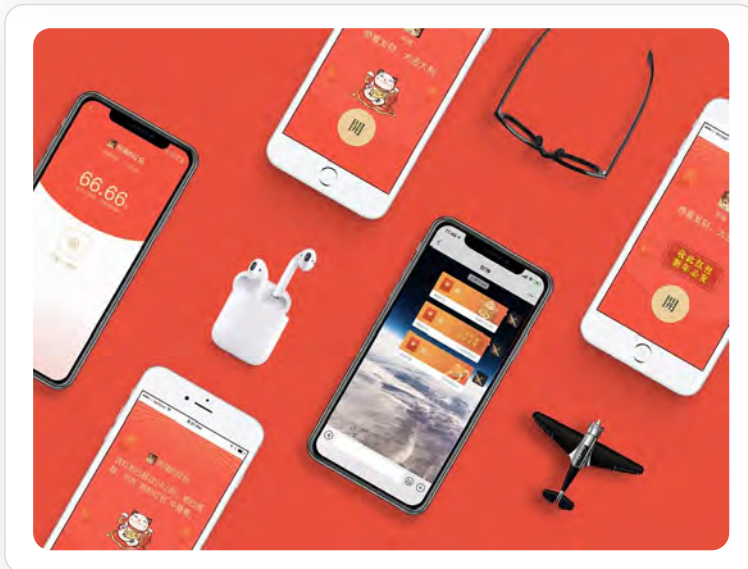
02. Branding via key traditional festival

03. 2,000 digital Red Envelope snapped up in 1 hour

04. Focus on engagement

05. Stay on top of the digital social trend

06. 2026 Year of the Horse, “Mana of the Horse”



2026 OTA LNY PACKAGE

4钻 0905-22

Hawaii

【品质4钻 碧海潮生曲】
· 多情夏威夷7日 ·

KOREAN AIR 5星大韩 23城联运

2025: 12月10日 22800元/人

2026: 01月14日 22800元/人

这里有温暖的海风、欢快的尤克里里、热情的草裙舞
鲜美的金枪鱼、慵懒的绿海龟、绽放的鸡蛋花和数不尽的美景
请跟随我们，向赤道靠拢，这个冬天不太冷

KUALOA RANCH
【古兰尼牧场电影之旅】
这里不仅是好莱坞导演的最爱
更是波利尼西亚文化活态博物馆

PEARL HARBOR
【沉浸式历史体验】

【庆新春特别活动】
周五绚烂烟花夜
沙滩派对
过一个欢乐吉祥年

【深度探索者选项】
火山岛/茂宜岛/游园/出海/骑马/奥莱
更多精彩随心选择

火山国家公园 波利尼西亚文化中心 彩虹瀑布 夏威夷海滩公园 卡阿纳帕利沙滩 日落游船

中青旅 Akaia 遨游旅行

ALOHA AURORA
不只极光
从夏威夷火山到阿拉斯加冰川
跨越北极圈 西雅图不眠夜 美国15日

无购物自费: 11人VIP精致小团·夏威夷双岛·极光列车·冰川徒步·狗拉雪橇
连续4晚极光观测·沙滩露营·圣诞老人之家·极地博物馆·派克市场

北极圈 ARCTIC CIRCLE 费尔班克斯 FAIRBANKS 安克雷奇 ANCHORAGE 西雅图 SEATTLE 夏威夷欧胡岛 OAHU 夏威夷火山大岛 ISLAND OF HAWAII

2025年11月30日
2026年01月11/13日 02月01/15日 03月01日
RMB 65800起

KUALOA RANCH seattle USA ANCHORAGE FAIRBANKS

2026 TRADE MISSION (MAY)

Expanding Trade Outreach

01.

Goals

Forge partnerships, promote the latest offerings/ experiences

02.

Market

Target major 1st and 2nd tier cities

03.

Builds on

Partnerships of ITB China, MITE, Trip.com, and culture display

04.

Impact

Boost visitation, strengthen OTA market presence.



DBEDT SISTER STATE MISSION

- ✓ 40 years with Guangdong | 33 years with Hainan
- ✓ Boost trade & promote Hawai'i products
- ✓ Promote tourism & education partnerships
- ✓ Open new investment opportunities
- ✓ Participation of Legislators, DBEDT, UH Reps, Coffee industry leaders, and local Chinese communities
- ✓ July 20 – 28th in Guangdong and Hainan



GUANGDONG CHINA
中国 广东



PARTNERSHIP OPPORTUNITIES

01.

Social Media Content
Collaboration (ongoing)

02.

US Embassy & Consulates Tourism
Roadshows (quarterly)

03.

Coffee Meets Culture Immersive
Agritourism (Mar-Jun 26)

04.

Trade Mission – Eastern China
(May 26)

05.

HTC + Hertz road trip multi-year
influencer-led digital series (Oct 26)



Mahalo
谢谢!



2026 Branding Marketing Plan Taiwan



2026 Brand Management Plan



Hawai'i Tourism Taiwan Team



Andrew Koh
Managing Director



Amy Lo
Account Director



Felicia Tseng (Fifi)
Travel Trade Director



Ann Lin
Marketing Specialist



Hubert Lo
Public Relations Director



Yuri Hsu
Social Media Specialist

Target Audience Segments

High-value, sustainability-conscious travelers across key demographics represent Hawai'i's prime opportunity. Taiwanese travelers, on average, spend \$2,322 per trip, with 77% choosing hotels and 52% preferring 4-star+ accommodations. They also actively seek local culinary experiences, indicating a desire for quality and authentic engagement. Furthermore, over 80% desire eco-friendly options, with 20% actively practicing sustainable travel through local purchases and conservation activities.



Silver Travelers (60+)

This segment shows 68.5% growth in the past decade. 65% prioritize spending on experiences over inheritance, and 26% are actively pursuing lifelong dreams through travel.



Family Travelers (30-49)

Comprising 39.1% of outbound travelers, this segment saw a 64.4% growth in the children (1-12) sub-segment. Families with children under 12 tend to plan ahead, while Packaged tours remain appealing.



LGBTQ+

With Taiwan leading Asia in marriage equality, there is a growing demand for inclusive and safe destinations, particularly for honeymoons and celebrations.

An aerial photograph of a tropical coastline. In the background, a large, rugged mountain with a prominent peak rises from the land. The mountain's slopes are covered in dense green vegetation. In the foreground, a coastal town is visible, featuring several buildings with blue roofs and a mix of greenery. The town is situated along a curved shoreline that meets a body of water with a sandy beach. The water is a deep blue, and the sky is filled with soft, white clouds. The overall scene is a picturesque representation of a tropical island environment.

Major Campaigns and Programs

Key Objectives in Taiwan

Ultimate Goal : To drive demand for Hawai'i , contributing to direct flights



Re-establish Presence

Focus on re-establishing Hawai'i's presence in both Business-to-Business (B2B) and Business-to-Consumer (B2C) sectors.



Generate Online Presence

Create compelling online content to engage and inform the target audience effectively.



Strengthen Brand Recognition

Enhance Hawai'i's brand recognition to build strong support for potential direct flight routes in the future.

Key Strategies for Taiwan

Integrated Campaigns to enhance destination awareness and to drive travel demand



Re-establish connection

- Flagship campaigns and always on communication channels



Generate online content

- Videos
- Social media content
- Media coverage: Print & Digital



Develop AI integration

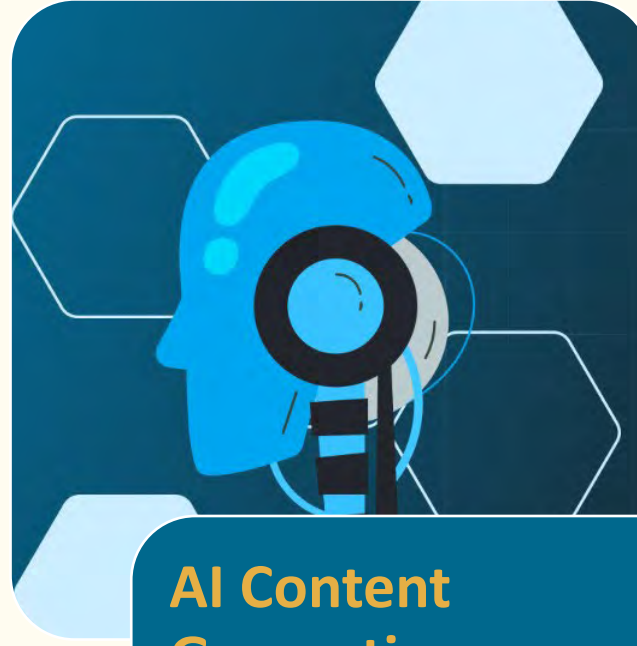
- PR strategy
- Keyword generation that will contribute to easy AI search

The Path to AI



HTT Programs

- Aloha Festival
- Lei of Love
- Aloha Spirit Influencers Program
- OTA Co-Op
- Media Partnership
- PR Tactics
- Social Media Roundup



AI Content Generation

- Hawai'i attractions
- Hawai'i experiences
- Hawai'i activities
- Hawai'i itineraries
- Hawai'i local gourmets



Traditional Chinese Travelers Prompts

- What's the best island destination
- What's the best honeymoon destinations
- What to do in Hawai'i
- Itinerary for a 5-day Hawai'i trip

Aloha Festival

Signature two-day cultural event (revival of 2018, 5,000+ attendees) at high-traffic weekend location in Taipei

- **Consumer Activities: +5,000 attendees**
- **Travel Trade Engagement: 2 TOs at event**
- **PR & Promotion: 1 Media Gathering + 20 News Clips**
- **Industry Collaboration**
- **Hawai'i-Made Products**
- **AI Integration**



Hawai'i Sales Mission – Taipei

- Consumer Activities
- Travel Trade Engagement
- PR & Promotion
- Island Representation
- Industry Collaboration
- Hawai'i-Made Products

→ Integrated Campaigns: Aloha Festival



Month of Lei (Mother's Day)

- Consumer Activities: 2 workshops, 20 participants
- Travel Trade Engagement: 1 product
- PR & Promotion: 1 media session, 10 media/influencers
- Island Representation
- Hawai'i-Made Products

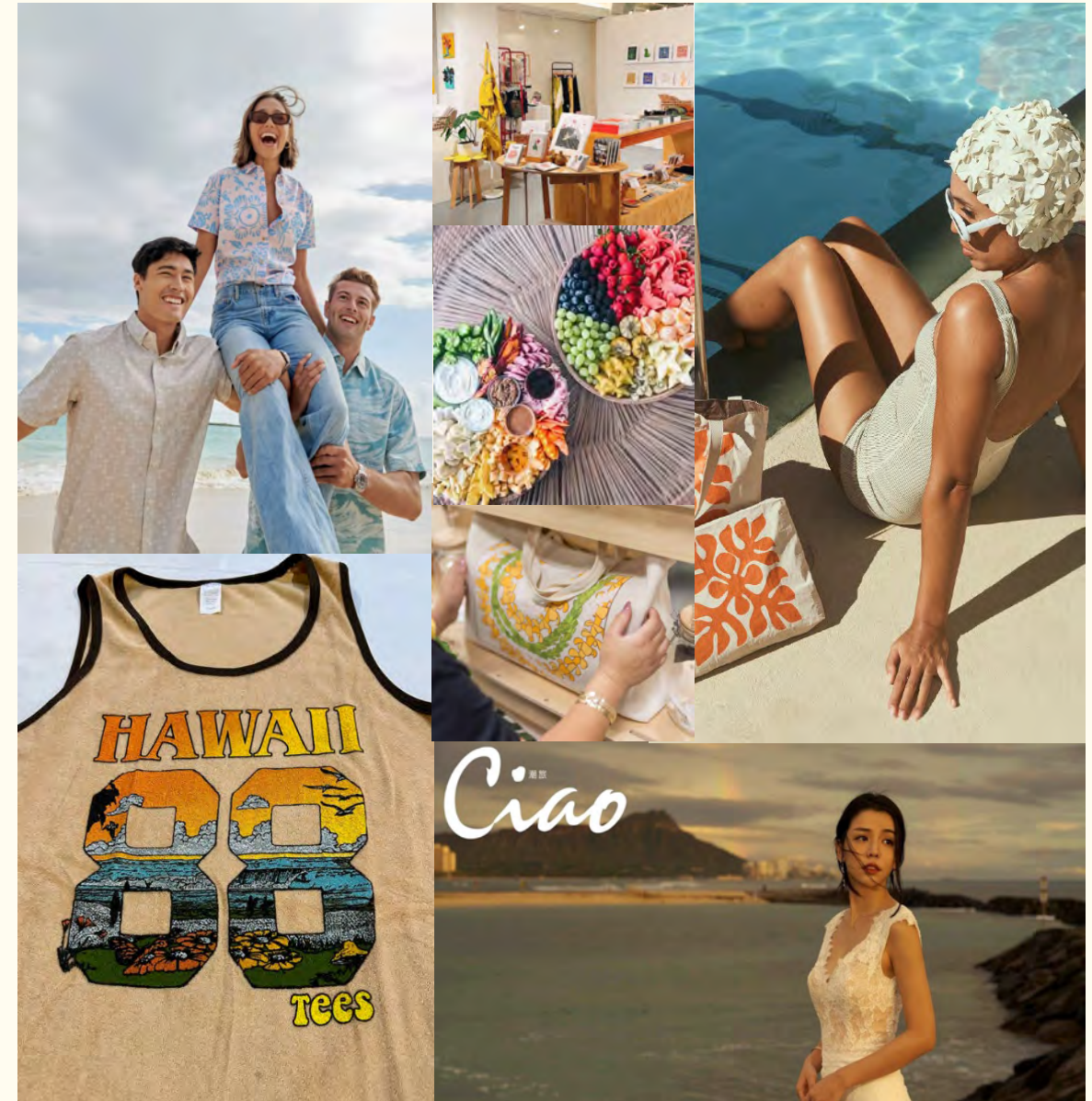


Islands of Style - Media Partnership

Collaborate with leading lifestyle media (e.g., Marie Claire, Vogue, Cosmopolitan) on a Hawai'i-themed edition with cover story + quarterly "Editor's Selection" column.

- **PR & Promotion: 1 editorial and 4 special columns & 4 online social media posts**
- **Travel Trade Engagement: 1 product**
- **Island Representation**
- **Industry Collaboration**
- **Hawai'i-Made Products**

→ Integrated Campaigns: Aloha Festival, Influencer Program, Lei Your Love



Aloha Ambassador Influencer Program

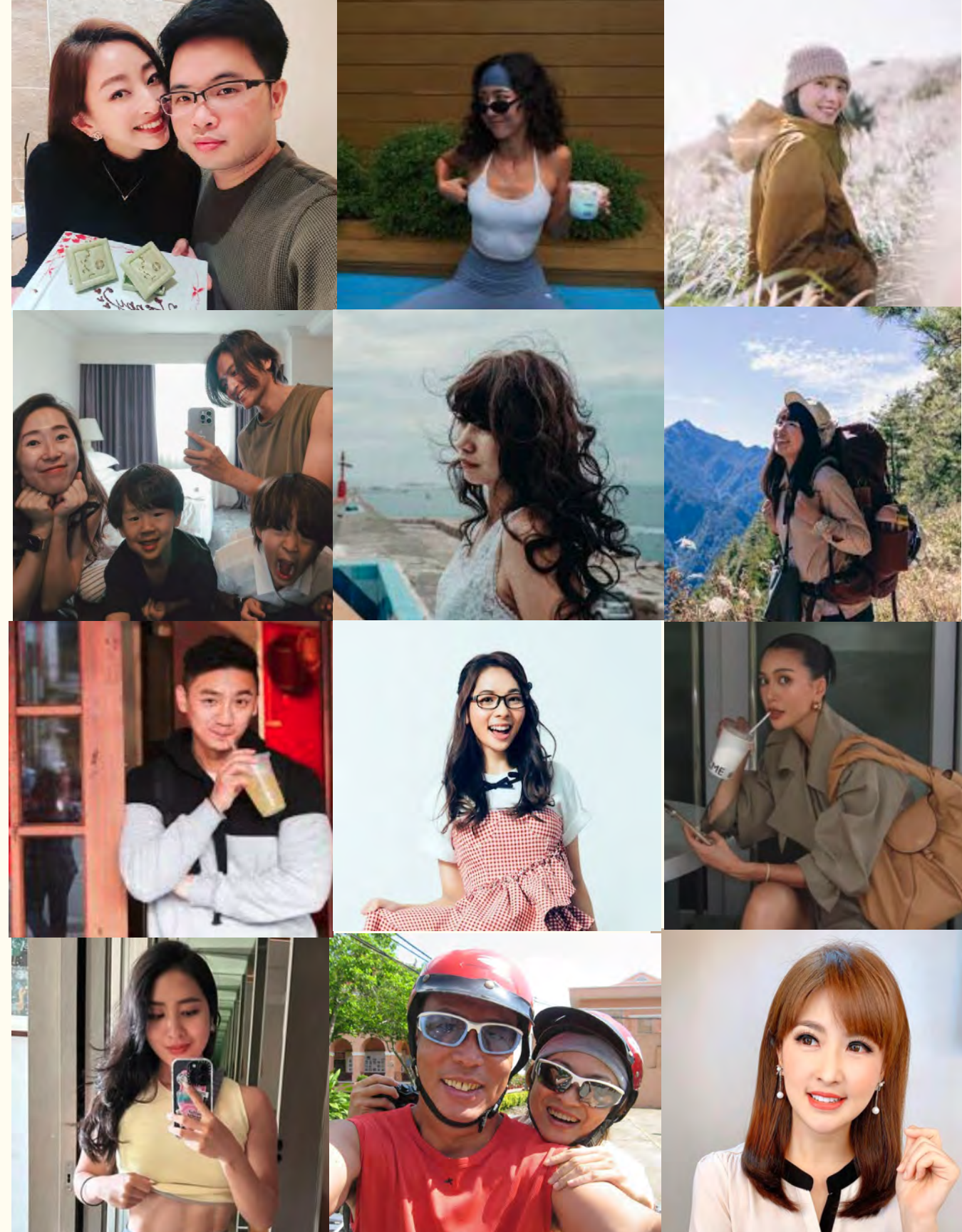
12 mega & micro creators share authentic Hawai'i stories on culture, adventure, food, and mindful travel, promoting respectful, immersive experiences.

- **Quarterly Themes:**

- Q1: Family Fun (young families)
- Q2: Outdoor, Nature, Wellness (Gen Z, Millennials)
- Q3: Food, Shopping, Wellness (LGBTQ+, Gen Z, Millennials)
- Q4: Romance & Wellness (affluent & silver travelers)

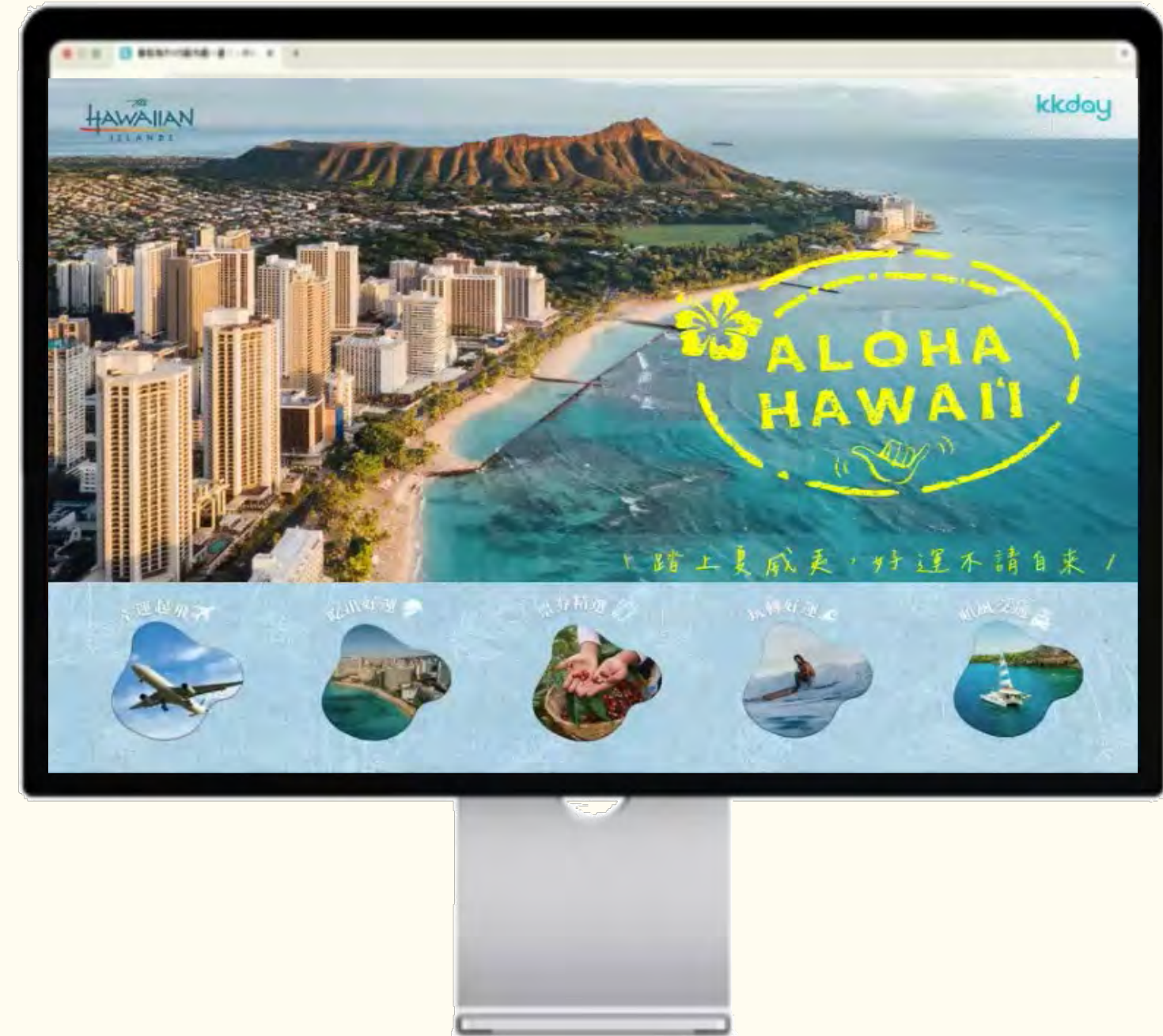
- **Travel Trade Engagement: 6 products**
- **Social Media & GoHawaii.com: 12 influencers**
- **Island Representation**
- **Industry Collaboration**
- **Hawai'i-Made Products**

→ Integrated Campaigns: PAK & Boutique Agency Co-op



Hele Mai Hawai'i – OTA Digital Co-Op

- Trade Engagement: 1 OTA
- PR & Promotion: 200,000 page views
- Island Representation
- Industry Collaboration



→ Integrated Campaigns: Influencer Program

PAK Agency & Boutique Agency Co-Ops

- **Trade Engagement:**
8 Wholesales Agencies vs. 5 Boutique Agencies
- **PR & Promotion:**
Targeting media investment and content marketing
- **Island Representation:**
O'ahu only vs Multi-Island Itinerary.

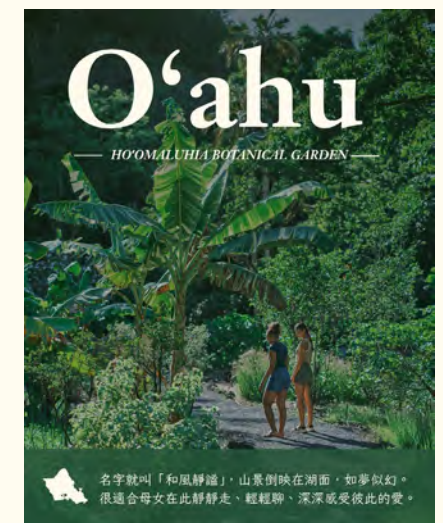
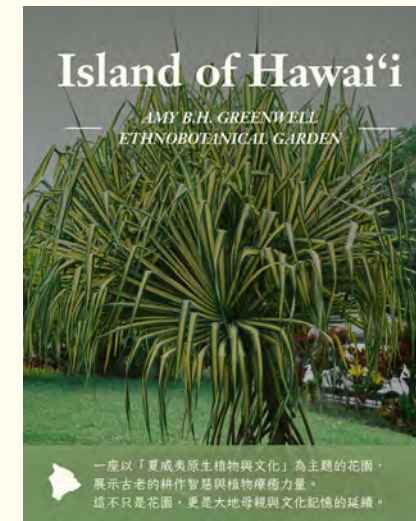
→ Integrated Campaigns: Influencer Program



Public Relations Tactics & Social Media

- Media & KOL Events: Festival previews, lei studio launches
- Press Releases: Bi-monthly, aligned with key campaigns & seasonal stories
- Always-On Media Relationship: Pitch niche tourism (diving, culinary, LGBTQ+), timely PR & crisis comms
- Social Media Content Themes:
 - Hawaiian Dictionary (language & values)
 - Hawai'i Destinations (island highlights)
 - Call from Hawai'i (inspiration, emotion)
 - Meaningful Travel (regenerative tourism, giveback)
 - Seasonal Greetings (holidays, events)

→ Integrated Campaigns: Aloha Festival, Lei of Love, OTA Co-op, PAK and Boutique Travel Agency Co-op, Influencer Program



Partnership Opportunities



Partner Opportunities

Number	Campaign & Program	Time	Opportunity
1	Aloha Festival	Aug, 2026	In-Kind Contribution
2	Lei Your Love – Month of Lei (Mother’s Day)	Apr - May, 2026	In-Kind Contribution
3	Islands of Style - Media Partnership	Year-long	In-Kind Contribution
4	Aloha Ambassador Influencer Program	Year-long	In-Kind Contribution
5	Hawai’i Sales Mission – Taipei	Aug, 2026	Participant Fee & In-Kind Contribution
6	Hele Mai Hawai’i – OTA Digital Co-Op	May, 2026	In-Kind Contribution
7	PAK Agency Co-Ops	Feb, 2026	In-Kind Contribution
8	Boutique Agency Co-Op	Mar, Jun, Aug, Nov. 2026	In-Kind Contribution
9	Public Relations Tactics	Year-long	In-Kind Contribution
10	Social Media Campaign	Year-Long	In-Kind Contribution



Mahalo Nui Loa!

謝謝!

HAWAII TOURISMTM
TAIWAN

**2026 Branding Marketing Plan
Meetings, Conventions and Incentives
(MCI)**



HTA - BSC

08 October 2025



2026 PLAN HIGHLIGHTS

2025: Momentum Meets Headwinds

- Record-setting years: 22 conventions, \$500M + impact
- Single Property ahead of YTD goals for tentatives and definites
- Citywide: tentatives up 45%, conversion challenged
- Competitive climate; incentives, free rent, lower f&b from peers
- Confidence expected to return with January repair start



Hawai'i Tourism Conference
2025



2026 PLAN HIGHLIGHTS

Short-Term Response 2026, 2027

- Consistent Messaging across all platforms
- Short-Term Solutions, Long Term Impact
 - Creating mini-wides across multiple hotels
 - Securing alternative venues
 - Leveraging Convention Center during non-construction hours
- Creating compression across all islands.



Hawai'i Tourism Conference
2025



2026 PLAN HIGHLIGHTS

Looking Ahead *2028-2032*

- Critical recovery window once the Center re-opens
- Secure anchor events in medical, STEM, global association/incentive sectors
- Rebuilding Long Term Booking Pace + global rotation cycles
- **Goal:** restore planner confidence and Hawai'i's global competitiveness



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2026 PLAN HIGHLIGHTS

Strategies influencing our work

- Restore Confidence in the Hawai'i Convention Center
- Maximize Citywide Conversion and Future- Year Recovery
- Expand Single Property and Incentive Business
- Sustain Global Market Readiness
- Strengthen Brand, Client Experience, and Service Culture
- Define and Deliver Legacy Impact
- Media Strategy



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2026 PLAN HIGHLIGHTS

KPI's, Legacy, Regenerative

- Redefining KPI's: room nights + client satisfaction + legacy impact
- Legacy Impact Framework: workforce, education, culture, community
- Meetings, Conventions, Incentives – a natural driver of regenerative tourism



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2025



MAHALO

**2026 Branding Marketing Plan
Meetings, Conventions and Incentives
Canada**

2026 BRAND MARKETING PLAN – Canada Market

HAWAI'I TOURISM CANADA TEAM



Susan Webb

Country Director,
President VoX
International



Colin Wood

Account Director



Erin Oddleifson

Director of
Marketing
& Client Services



Samantha Carreira

Public Relations
Account Manager



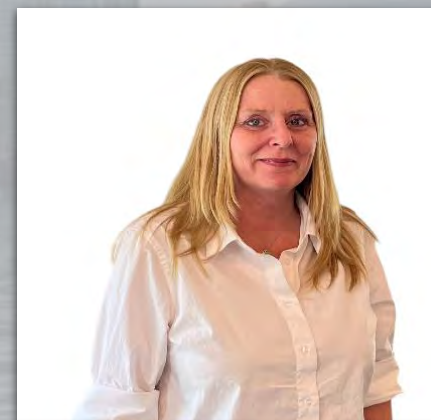
Rita Spizzirri

Marketing
Production
Manager



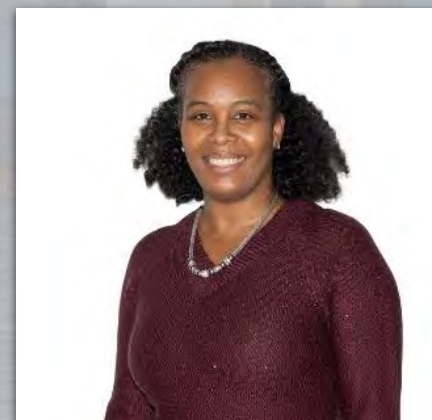
Anchita Singla

Social Media
Support



Karen-Ann Zoschke

Accounting
Manager



Lana Lubon

Events Manager



Faye Tierney

Account Services



Gustavo Inciarte

Account Manager
Western Canada



Carla D'Andrea

Account Manager
Eastern Canada



2026 TARGET AUDIENCE



Affluent Travelers

- ❖ Offering a greater likelihood of higher in-destination spend, longer trip duration, multi-island travel and repeat visits
- ❖ Less sensitive to price, currency fluctuations, etc.
- ❖ Household annual income over \$100K USD



Active Travelers / Experience Seekers

- ❖ Value physical and unique exploration focused experiences that incorporate culture and history



Snowbirds / Retirees

- ❖ Long duration visitors who live like locals

70% of visits come from British Columbia & Alberta, but Ontario over indexes with 36% of the desired audience

CANADIAN TRAVEL TRENDS

- ❖ Prioritizing experience-driven vacations
- ❖ Fewer, longer vacations
- ❖ Value-seeking, but not afraid to spend
- ❖ Solo travel, self-fulfillment, and sustainable

Hawai'i's Resonating Strengths

- ❖ The Aloha Spirit (feeling welcomed)
- ❖ History & Culture
- ❖ In-destination Safety
- ❖ Unique Experiences
- ❖ Kuleana & Mālama





2026 STRATEGIES & TACTICS

CONSUMER DIRECT STRATEGY

Continue to reinforce Hawai'i as...

- ❖ Welcoming – as a contrast to current perceptions about the continental U.S.
- ❖ Beautiful, relaxing, safe
- ❖ Incredible and unique experiences

Utilizing...

- ❖ Mālama, Kuleana & Ho'okipa messaging
- ❖ People, Place, Culture resources, with an emphasis on video
- ❖ A strategic mix of on and offline tactics



CONSUMER DIRECT STRATEGY

With an objective of inspiring mindful travel while preparing visitors for...

- ❖ Safe and responsible travel
- ❖ Caring for and respecting Hawai'i's culture, people, environment
- ❖ Supporting and shopping at local businesses

AI Support

HTCAN will support global AI strategy by maximizing Canadian content that contributes to responses to traveler questions about Hawai'i.

- ❖ Canadian content on gohawaii.com/ca



CONSUMER DIRECT TACTICS

TV Integration

- ❖ **New** multi-platform custom content-driven campaign with Bell and Bloomberg Media targeting affluent travelers
- ❖ Social amplification and online video extensions

Social Media

- ❖ **New** TikTok and Pinterest tests
- ❖ Canadian Facebook & Instagram channels
- ❖ Organic and paid

Digital Campaigns

- ❖ Online Video
- ❖ Connected TV & Retargeting
- ❖ Search & Programmatic Display Advertising



CONSUMER DIRECT TACTICS

Co-operative Campaigns

- ❖ Collaborative win-win initiatives with key partners
- ❖ Strategic mix on and offline tactics utilizing paid and owned assets
- ❖ Cooperative 1:3 value
- ❖ Mindful traveler education incorporated as a condition of partnership



PUBLIC RELATIONS

New! Influencer Group FAM: Spring 2026

- ❖ Islands TBD
- ❖ Highlighting wellness, adventure, culinary and culture
- ❖ 2-3 influencers

Group Media FAM: Fall 2026

- ❖ Two islands - TBD
- ❖ Theme: Beyond the Bucket List: Hawai'i's Must-Sees & Hidden Treasures
- ❖ 4 journalists

Individual Media Visits: Year Round

- ❖ 2-3 individual media visits in 2026
- ❖ Islands TBD



Hawaï surfe sur la vague du tourisme régénératif

Malik Cocherel, Le Devoir
Collaboration spéciale
12 octobre 2024



Photo: Malik Cocherel La côte nord de l'île d'O'ahu

PUBLIC RELATIONS

TMAC Conference: Spring 2026

- ❖ Richmond, BC
- ❖ 24 one-on-one appointments with media from across Canada
- ❖ Additional networking opportunities

Discover America Media Day: Fall 2026

- ❖ Toronto, ON
- ❖ 10 one-on-one appointments with local media
- ❖ Networking opportunity at luncheon
- ❖ Opportunity to submit articles for award consideration (HTCAN won Best Consumer Article in 2023 and 2024)



PUBLIC RELATIONS

Broadcast Segments: Year Round

- ❖ Partner with on-air personalities to tell the story of Hawaii to their broadcast audiences

Media Partnerships: Year Round

- ❖ Collaborate with key media partners on a large scale digital and print campaign to increase visibility

Hawai'i brings the Aloha spirit to Toronto

By Ann Ruppenstein | October 24, 2024



TRAVEL TRADE ACTIVITY

1. Education / Training

Combination of webinars, in-person activities, and releasing bite-sized content.

- ❖ Destination Specialist and Brand USA Badge Programs
- ❖ Aloha Canada 2026
- ❖ Trade FAMs
- ❖ Partner Shows / Launches

2. Communications

- ❖ Utilize key travel trade media platforms to educate, inform, inspire, and update Advisors and product decision makers



A tropical beach scene with two palm trees in the foreground, their shadows cast on the sand. The ocean with white-capped waves is in the middle ground, and a blue sky with light clouds is in the background. The text "MAJOR PROGRAMS 2026" is centered over the image in a large, white, bold, sans-serif font.

MAJOR PROGRAMS 2026

MAJOR PROGRAMS 2026

New! TV Integration – Bloomberg & Bell Media

- ❖ National & Bilingual
- ❖ Multiplatform custom content-driven campaign utilizing editorial style video storytelling
- ❖ Six vignette series showcasing immersive experiences aligned with Mālama, Kuleana, Aloha themes
- ❖ Hosted by known on-air talent
- ❖ Social amplification and online video extensions

Anticipated Market Impact: Over 2.1M impressions to a desirable affluent target audience.



BellMedia

Bloomberg

MAJOR PROGRAMS 2026

New! Lei Day Activation

- ❖ British Columbia / Vancouver focused – May 1
- ❖ Generating friendship, affinity, education, and aloha
- ❖ Lei greetings for politicians
- ❖ Cultural practitioners from Hawai'i
- ❖ Local media engagement
- ❖ Consumer activation activity (school visit)
- ❖ Press outreach for story generation
- ❖ Social media buzz

Anticipated Market Impact: High visibility and significant PR exposure within desirable British Columbia market.



MAJOR PROGRAMS 2026

New! Influencer Group FAM: Spring 2026

- ❖ Islands TBD
- ❖ Aiming younger
- ❖ Highlighting wellness, adventure and promoting cultural connections

Group Media FAM: Fall 2026

- ❖ Islands TBD
- ❖ Theme: Beyond the Bucket list: Hawai'i's Must-Sees & Hidden Treasures

Travel Advisor FAM: Fall 2026

- ❖ Islands TBD
- ❖ Theme: Luxury Hawai'i
- ❖ Travel Media included for additional impact



Anticipated Market Impact:
Significant increased exposure to new audiences & advisor luxury product awareness.

MAJOR PROGRAMS 2026

Co-operative Campaigns – peak booking season

- ❖ Win-win campaigns that drive targeted audience response
- ❖ Air Canada, WestJet, Flight Centre, Costco Travel

Aloha Canada 2026

- ❖ Tentatively December – Toronto, Calgary Vancouver
- ❖ Travel Advisor education focused
- ❖ Media Events – Toronto & Vancouver
- ❖ Cultural component
- ❖ Hawai'i and Canadian co-op partners attending

Anticipated Market Impact: High visit conversion via key partners and trade inspiration to over 400 Travel Advisors.





PARTNERSHIP OPPORTUNITIES

PARTNERSHIP / INVOLVEMENT OPPORTUNITIES

Agent Focused Trade Shows

Aloha Canada 2026

Agent Focused FAMs

Webinar Support

Campaign Content Creation Support

Individual Press Trip Support

Group Media FAM Support

Quarterly Press Releases

Agent Communications

Contact HTCAN for details!





MAHALO!

2026 Branding Marketing Plan USA

Hawai'i Tourism Authority Branding Standing Committee

US MMA

08 October 2025



A G E N D A

1. *Market Situation*
2. *Regenerative Tourism Mandate and Framework*
3. *The Derivations and Domains of Regenerative Tourism*
4. *Brand Ethos*
5. *2026 Plan Highlights*
6. *2026 Campaign*
7. *Partnership Opportunities*
8. *Bottom Line*



MARKET SITUATION



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U.S. MARKET SITUATION

YTD Performance Through July 2025



Hawai'i Tourism Conference
2025

U.S. MARKET SITUATION

Headwinds *YOY Performance* *July 2025 Data*



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U.S. MARKET SITUATION

Airlift and Access



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2025

Regenerative Tourism Framework

SB2659, Act 128

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



OLA HAWAI'I



Hawai'i Tourism Conference
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2026 PLAN HIGHLIGHTS

The Hawai'i Target Traveler



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2026 PLAN HIGHLIGHTS

Media Mix: How We Reach Consumers



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2026 PLAN HIGHLIGHTS

Public Relations / Earned Media



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2026 PLAN HIGHLIGHTS

Travel Trade & Advisor Engagement



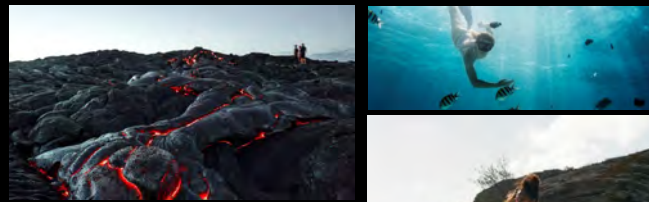
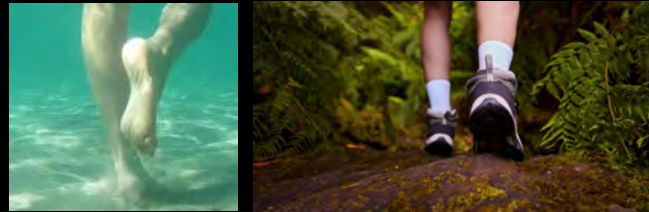
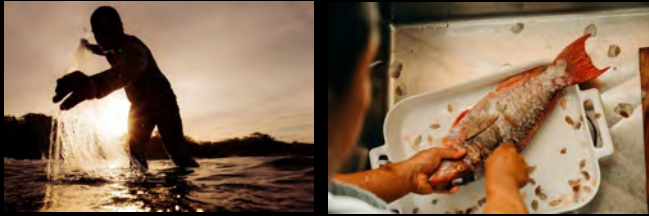
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HAWAI'I STAYS WITH YOU



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2026 PLAN HIGHLIGHTS

Partnership Opportunities



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