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BRANDING STANDING COMMITTEE MEETING
HAWAIʻI TOURISM AUTHORITY
Wednesday, October 8, 2025, at 1:30 p.m.

Virtual Meeting

MINUTES OF THE BRANDING STANDING COMMITTEE MEETING

MEMBERS PRESENT:	Kimberly Agas (Chair), Troy Lazaro, Terry Fischer
MEMBERS NOT PRESENT:	Danny Ojiri, Grant "Lanai" Tabura
NON-VOTING MEMBER:	Joel Guy, Mericia Palma Elmore
HTA STAFF PRESENT:	Jadie Goo, David Uchiyama, Talon Kishi, Christina Tuchman, Jill Radke, Jennifer Bastiaanse
GUESTS:	Susan Webb, Darragh Walshe, Irene Lee, Ayako Ishiwari, Amy Thomas, Dennis Suo, Lynn Whitehead, Colin Wood, Andrew Koh, Aaron Salā, Sa Taʻala, Eseta Malufau
LEGAL COUNSEL:	John Cole

1. **Call to Order and Opening Protocol**

Chair Agas called the meeting to order at 1:35 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. Goo conducted the roll call, and members were confirmed in attendance by themselves, except for Members Ojiri and Tabura, who were excused.

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

Member Lazaro proposed a motion to approve the minutes, and Member Fischer seconded it. No one objected to the motion, and the motion was carried unanimously.

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

a. Hawaiʻi Tourism Europe

Ms. Amy Thomas, Account Director of Hawaiʻi Tourism Europe (HTE), presented their 2026 Brand Marketing Campaign. She introduced her team based in Germany and the UK, comprising two account managers and two public relations (PR) managers.

Target Market Strategy

Ms. Thomas stated that the three core audience segments identified during 2025 would continue to be targeted in 2026. These segments were positioned as cultural ambassadors who, upon returning home, would advocate for Hawaiʻi among their friends and families. Emphasizing a quality-over-quantity approach, she noted that these audiences aligned with regenerative tourism goals, as they tended to stay longer, spend more, and engage deeply with Hawaiian culture.

Trade and Public Relations Strategy

Ms. Thomas highlighted the importance of trade and public relations within the European market. The majority of European customers booked their travel to Hawaiʻi through a tour operator or via an agency that subsequently worked with a tour operator. This preference stemmed from the high-value nature of the trip and the additional consumer protection afforded when booked as a package, particularly in the event of unforeseen circumstances.

HTE's trade strategy focused on ensuring that travel professionals were well-trained and confident in selling the destination. The team also collaborated with product managers to maximize content in websites and brochures, as well as verifying its accuracy, frequently requesting trade operators to enhance promotional efforts by including keynotes on their websites.

Ms. Thomas reminded committee members that HTE actively represented Hawaiʻi at numerous trade shows and events across Europe and operated a significant familiarization (FAM) program. Two sales-focused trade FAM trips were planned for 2026, each covering all four major Hawaiian Islands.

Public Relations Initiatives

HTE's PR strategy included the release of twelve targeted press communications annually, tailored to generate optimal media interest. The HTE PR managers were highly experienced and well acquainted with the trade media landscape in their respective countries. They managed a dedicated FAM trip program and maintained crisis readiness, having successfully navigated previous challenges, though it was hoped such measures would not be required.

Consumer Campaigns

Two consumer campaigns were scheduled for 2026. The first, titled *ʻŌlelo Hawaiʻi*, was planned for March and April in Germany and the UK. This culturally driven initiative would unfold in three phases: Awareness, Consideration, and Conversion, with initial phases aiming to build interest and engage the audience, while the Conversion phase, executed by tour operator partners, sought to translate interest into bookings. These partners were expected to amplify the effectiveness of the conversion efforts.

Additional digital campaigns were designed to highlight the Hawaiian language and history and foster deeper cultural storytelling and engagement. Hawaiian proverbs incorporated into campaign displays were expected to evoke emotional resonance. The initiative specifically targeted ethical explorers and included a partnership with the British Museum (BM). This institution had received 6.2 million visitors in 2024 and had scheduled an exhibition exploring the historical connection between Great Britain and Hawaiʻi for January to May 2026. Ms. Thomas noted that the BM exhibition was expected to significantly elevate Hawaii's visibility.

Ms. Thomas informed committee members that the second consumer campaign was entitled *One ʻOhana, Four Stories*, and was scheduled to take place during October and November 2026 in Germany, Switzerland, and the United Kingdom. Each market was to be supported by a tour operator campaign partner under a contractual agreement. The campaign was designed as an experience-led, island-themed storytelling initiative that highlighted the relationship between the land (*ʻāina*) and the sea (*kai*). It aimed to showcase the distinct personality of each island, emphasizing the importance of visiting multiple islands. The campaign also sought to spotlight stewardship and cultural traditions such as wayfinding and surfing, and targeted wellness-seekers and conscious families.

Creative Formats and Campaign Innovation

Ms. Thomas presented examples of the four innovative creative formats planned for the 2026 campaigns, comprising a "swipe to reveal" concept, a multi-frame video, a Hawaiʻi island grid format, and an interactive video. Ms. Thomas noted that while these examples were not Hawaiʻi-based, they served to illustrate the intended approach.

Aloha Sales Mission

Ms. Thomas announced that the Aloha Sales Mission was scheduled for the first week of September 2026 in London, Manchester, Hamburg, and Frankfurt. She reminded committee members that the 2024 mission had been a significant success. This biennial initiative would include sales training for frontline staff, meetings with product managers, and press and media events featuring selected media representatives.

2026 Timeline and Year-Round Activities

Ms. Thomas presented a timeline for 2026, outlining events planned across all four quarters. These events were intended to draw attention to year-round activities such as trade training, product manager meetings, and event representation, which would complement the major campaign events, FAM trips, and the Aloha Sales Mission.

Partnerships and Collaboration

Ms. Thomas gave details of ongoing collaborations with Hawaiian partners and expressed her hope for continued support from partners to welcome guests from both the trade and press sectors. The sales mission was identified as the most effective opportunity to present Hawaii's tourism offerings to the European trade and press communities collectively. HTE had actively encouraged participation and hoped for strong representation from Hawaiʻi at the event.

Ms. Thomas emphasized the importance of maintaining up-to-date and accurate content and imagery in collaboration with travel operator campaign partners. She stated that she welcomed reports related to trade and press FAM trips, as well as inquiries and comments from those who might identify emerging trends. Reminding committee members that the HTE team possessed deep familiarity with the European market, Ms. Thomas pointed out that HTE distributed a trade newsletter, issued regular press releases, and maintained a LinkedIn page. The team gratefully received new content about Hawaiʻi and looked forward to sharing it through these channels.

Ms. Thomas informed committee members that HTE had been named a finalist in five categories for the UK Travel Magazine of the Year awards, with winners to be announced on October 23. She had been particularly gratified by the recognition of new conservation and tourism initiatives. Ms. Thomas concluded by providing contact details for all five team members and invited any final questions.

Chair Agas expressed her thanks for Ms. Thomas' presentation.

Member Lazaro also conveyed his appreciation for the presentation, stating that all his questions had been addressed and that he was enthusiastic about the promotional efforts and their anticipated outcomes.

Chair Agas requested that Ms. Thomas suggest ways to expand the collaboration with the British Museum, including potential partnerships with other organizations represented there. She looked forward to continuing the dialogue and exploring additional ideas.

b. Hawaiʻi Tourism Oceania

Ms. Goo introduced Mr. Darragh Walshe, Brand Leader of Hawaiʻi Tourism Oceania (HTO), based in New Zealand, who presented the 2026 Brand Marketing Plan for the Oceania market.

Mr. Walshe introduced key members of his team, noting that Ms. Anna Riedel, Project Manager, was unable to attend as she was representing Hawaiʻi at a luxury tourism meeting in Australia.

Target Audience Overview

Mr. Walshe reported that the current audience from Oceania comprised 54% repeat visitors, with an average age of 48 and an average party size of 2.5. He pointed out that although the number of loyal repeat visitors had been maintained, the statistics showed that nearly 50% of arrivals were first-time visitors, and this presented a valuable opportunity to target new audiences.

Mr. Walshe described the loyal customer base as a core audience motivated by authentic, immersive experiences. These travelers valued adventure, nature, cultural connection, and cost-effectiveness. However, although loyalty provided a strong foundation, it was necessary to shift the strategy to attract a new generation of travelers.

Emerging Segments

Mr. Walshe identified two emerging segments:

- experience-led, mindful, high-spending visitors from Generation Z and millennials
- women over the age of 50

The younger segment typically consisted of single or dual-income individuals without children, who traveled multiple times per year, often during shoulder or low seasons to avoid crowds. These travelers sought boutique accommodation, unique culinary experiences, and opportunities to contribute positively to the destinations they visited.

Mr. Walshe described the segment of women over 50 as fast-growing and high-value. Solo travel was increasingly popular among this group, and even when traveling with family, these individuals often served as the primary decision-makers. Their interest in immersive cultural experiences and wellness aligned well with Hawaii's storytelling, local communities, and restorative landscapes.

HTO planned to target these two groups as new visitors to Hawaiʻi, tailoring marketing and experiences to attract travelers who were not only high spending but were also committed to making a positive impact and embracing the spirit of Aloha.

Market Statistics

Mr. Walshe informed committee members that growth projections for the Oceania market were positive, with arrivals expected to reach approximately 205,000 in 2026, representing a 5.7% increase. Visitor days were projected to total 1.76 million, a 2.1% increase, and visitor spending was forecast at $540 million, reflecting a 4.7% year-on-year increase. Visitors from Oceania were particularly beneficial for Hawaiʻi due to their high per-person, per-day (PPPD) spending, averaging $300, and their extended stays, averaging 10 days. Additionally, one in five Oceania travelers visited multiple islands.

Trade Strategy and Activities

Mr. Walshe outlined various trade-focused activities, including cooperative marketing with three key partners: Qantas Holidays, MyHawaii, and Luxury Escapes. These initiatives targeted travelers seeking curated, experiential trips.

He emphasized the importance of wellness as a theme. He announced plans to refresh the trade hub during 2026 to ensure that this would continue to provide essential tools for the effective promotion of Hawaiʻi by trade operators.

The key roadshow for 2026 was scheduled for May, themed as the Month of Lei. It would involve signature cities with a destination focus and include partners from island visitor bureaux. Additional trade events were to include electronic direct mail campaigns, webinars, trade conferences with retail partners, and collaborations with VisitUSA and BrandUSA.

Mr. Walshe announced the launch of a new self-familiarization program, allowing agents to design their own holidays in Hawaiʻi. This program offered flexibility in travel dates, island selection, and experience choices, serving as an effective method for building deeper product knowledge.

Consumer-Focused Initiatives

Mr. Walshe listed several consumer-focused activities planned for 2026. These included a major influencer partnership and collaboration with Duke’s Day, particularly in Sydney. He highlighted the historical significance of the introduction of surfing to Australia during the visit of Duke Kahanamoku to Freshwater Beach in 1914.

HTO was also to partner with the Ocean Film Festival, and this would align with their goal of reaching active, mindful travelers. Media-focused activities included media FAM trips, with plans for themed FAMs centered on sports and active adventure.

Additional partnership initiatives

HTO anticipated collaboration with *International Traveler* to spotlight Hawaiian icons, with a particular emphasis on local makers and artists. The theme of wellness was to be integrated through a partnership with *Well Traveler*.

Mr. Walshe described the *New Wave* Campaign, developed in cooperation with *Adventure.com*, affiliated with *Intrepid*, and aiming to amplify the HTA's global messaging positioning Hawaiʻi as a premier destination for conscious, sustainable travelers. The campaign highlighted emerging Hawaiian leaders across the fields of arts, sports, tourism, and culture. These changemakers, honoring tradition while shaping a sustainable future, were to be featured through editorial content, social media videos, and compelling storytelling that would reinforce the tourism message.

Mr. Walshe informed committee members that HTO welcomed partnership opportunities with Hawaiʻi-based industries and expressed appreciation for their partners' continued engagement in the market.

The *Sea Cleaners* initiative was to continue in 2026, building on its previous success in bringing together youth ambassadors from across the Pacific Rim. During 2025, the Hawaiʻi Visitors and Convention Bureau (HVCB) partnered with youth ambassadors from Seattle to collaborate with local schools, conduct workshops, and participate in beach clean-ups in Maui. These activities addressed the issue of plastic pollution in the Pacific Ocean and emphasized collective responsibility for environmental stewardship.

Chair Agas thanked Mr. Walshe for his presentation and inquired about potential improvements in flight availability and seating capacity for 2026. Mr. Walshe responded that airlift remained a critical factor, noting some improvement in flight services from Australia during their summer period, and attributing this progress both to cooperative efforts with airline partners and to the generation of increased demand.

However, Mr. Walshe acknowledged that several challenges remained beyond their control, including aircraft access and maintenance. Operational issues at Sydney Airport had affected both Air New Zealand and Hawaiian Airlines. On a positive note, he highlighted the frequent flier partnership between Hawaiian Airlines and Qantas, which had facilitated increased visitation through the use of frequent flier points.

Mr. Walshe identified Melbourne as a market with significant growth potential. Historically, it had been underserved, with Jetstar as the sole carrier, which did not align well with the targeted high-value visitor profile. The introduction of Qantas flights from Melbourne was expected to ameliorate lift for this desired segment of travelers.

Member Lazaro expressed his gratitude for the presentation and commented on the relevance to conscious, sustainable travel of the *New Wave* Campaign. While he was familiar with this concept, he believed that such initiatives would have a meaningful impact on visitors to Hawaiʻi. He appreciated visitors' contributions to environmental restoration efforts in Maui.

Member Guy also extended his thanks and acknowledged the valuable work being carried out by Hawaiʻi Tourism Oceania.

c. Hawaiʻi Tourism Japan

Ms. Goo introduced Ms. Ayako Ishiwari, the Honolulu Director of Hawaiʻi Tourism Japan (HTJ), who delivered the presentation in place of Managing Director Eric Takahata, on tour in Japan with Gov. Green at the time.

Ms. Ishiwari presented the 2026 Brand Marketing Plan and introduced the HTJ team, which comprised seven members based in Japan and five in Hawaiʻi, including herself and Mr. Takahata.

Target Audience and Market Trends
Ms. Ishiwari reported that the current trend indicated growth in senior-led travel, alongside an evolving affluent market. Given the prevailing economic conditions, HTJ planned to focus its efforts on the affluent segment.

Primary geographic targeting consisted of regions served by airports with direct flights to Hawaiʻi. Regions served by local airports that were well connected to direct-flight hubs or otherwise easily accessible comprised the secondary geographic targets, as well as sister cities with established relationships with Hawaiʻi.

The 2026 target audience comprised the following segments:

- Active seniors
- The new wealth class
- Power couples
- Affluent Generation Z travelers

With a repeat visitation rate standing at 72%, HTJ also aimed to engage niche audiences such as the estimated 1.5 to 2 million Japanese hula enthusiasts, representing a significant segment of cultural ambassadors. Additional niche interest groups included pickleball participants and communities for other specialized activities.

Strategic Framework

Ms. Ishiwari emphasized the need for a stronger focus on short-term strategies while also recognizing the importance of cultivating a new generation of Hawaiʻi visitors, given the aging core market. This meant that HTJ adopted both short-term and medium-to-long-term initiatives.

Short-term strategies included a booking acceleration plan, expansion and enhancement of cooperative initiatives with industry partners to drive conversion, targeted marketing directed at brand-specific affluent segments, digital marketing efforts. They strengthened training and online education aligned with campaign themes.

Long-term growth strategies focused on brand management to preserve Hawaii's brand strength, continued branding and promotion of neighbor islands, strengthened digital marketing targeting younger travelers, and expanded initiatives to attract first-time visitors. HTJ also planned to collaborate with Meet Hawaiʻi to attract meetings, incentives, conferences, and exhibitions (MICE) groups, as well as develop sustainable owned media to produce consistent, high-value content.

Consumer Education and Promotions

Ms. Ishiwari noted that Hawaiʻi remained Japan's number one dream destination, but in spite of research placing Hawaiʻi at the top, actual bookings ranked lower due to cost and global conditions. To address this discrepancy, HTJ intended to deliver clear, value-driven messaging tailored to each audience segment, utilizing appropriate platforms and creative assets.

She reiterated the importance of the hula community in Japan, comprising 1.5 to 2 million individuals deeply connected to Hawaiian culture. During 2026, HTJ planned to expand targeted promotions to this community and strengthen cultural and emotional ties to Hawaiʻi.

Travel Trade Training and Engagement

To stimulate bookings, HTJ planned to execute joint promotions with wholesalers, online travel agencies (OTAs), and airlines. These efforts would align messaging and timing across channels. The organization also aimed to enhance industry knowledge through nationwide seminars, webinars, and courses offered via Aloha Program Satellite Offices.

Ms. Ishiwari informed committee members that HTJ intended to target educational and MICE travel through deeper collaboration with schools, government organizations, and Meet Hawaiʻi partnerships, thereby attracting new groups and incentive travel opportunities.

Public Relations Strategy
Ms. Ishiwari outlined a balanced public relations strategy that included both proactive and protective measures. While safeguarding Hawaii's brand integrity, HTJ would actively promote positive storytelling and engagement. The team planned to pitch stories to media outlets and expand its own media presence, integrating an overarching media plan to deliver consistent and high-impact messaging across all channels.

Island Distribution and Regional Promotion
For 2026, HTJ aimed to expand promotional efforts in anticipation of the resumption of Kona service and the continued recovery of Maui. The organization would work closely with island chapters and local partners to develop island-specific content tailored to key audience segments, as well as conduct FAM trips for wholesalers, OTAs, educators, and media to strengthen product development.

Major Programs
Recovery cooperative efforts were to be prioritized, with an emphasis on collaboration with industry partners. HTJ's partnerships with airlines, wholesalers, credit card companies, and OTAs would be maintained, including specific OTAs for action sales.

Digital Campaigns
Performance-driven digital campaigns remained central to conversion efforts. Ms. Ishiwari reminded committee members that HTJ worked closely with online platforms to enhance outreach and engagement.

***Yappari Hawaiʻi* Message**
The "*Yappari Hawaiʻi*" message, meaning "It's got to be Hawaiʻi," had been launched at the end of 2024 and continued to run successfully. A promotional video featuring a three-generation family giving back to their parents and highlighting how couples had performed well in the Japan market.

Active Senior Campaign
The active senior campaign targeted a growing segment of affluent, time-rich seniors. Research indicated that this demographic held $4.67 trillion in savings, and it was estimated that by 2036, one in three Japanese citizens would be over the age of 65. The campaign aimed to reframe the message from "Because I'm old" to "I'm not too old; I will enjoy

because I'm old." Active seniors had been targeted through a film series portraying Japanese seniors enjoying Hawaiʻi. Ms. Ishiwari added that products tailored by partners for this demographic were to be offered by owned media platforms.

Neighbor Island Promotion

A neighbor island promotion campaign, previously run several years ago, had been relaunched. During 2025, one hundred short videos had been produced to showcase the beauty, lifestyle, and traditions of each of the four major islands. The four main videos have been made available on the HTJ YouTube channel. High-impact digital campaigns were planned for 2026, including collaborations with influencers and creators to strengthen storytelling about the neighbor islands. Travel agents would also conduct FAM tours on each island.

Affluent Segment Initiatives

HTJ was to conduct tailored luxury campaigns during 2026 with the twin aims of engaging high-value segments and encouraging repeat visitation in future years.

Event Promotions

Ms. Ishiwari noted that each year in Japan the HTA supported approximately one hundred events, with exhibitions featuring cooperative categories. These events provided key opportunities to share updates about Hawaiʻi and showcase Hawaiʻi-made products, particularly in venues reflecting Hawaiian culture such as department stores, Hawaiʻi fairs, hula festivals, and cultural fairs. This was to continue through 2026.

Signature flagship events, branded as Hawaiʻi Expo, have been conducted since 2015. In 2025, HTJ collaborated with Okina Kalani for the Ke Au Hou Festival, achieving a record attendance of 22,000 participants, including many hulas and Hawaiʻi enthusiasts. Hula groups would continue to be targeted in 2026.

Japan Summit

This event has been conducted annually since 2015, bringing together one hundred senior partners and nearly three hundred on-island partners. The summit offered business-to-business meetings, market updates, and a platform for collaboration and new product development. The 2026 focus was to shift toward business-to-business meetings and experiential programs to accelerate the recovery of outbound travel from Japan, and would include staff of Japanese travel agencies who had not visited since the pandemic.

Educational Initiatives

These were to target travel industry media and consumers and would include webinars and FAM tours for travel agencies. Ms. Ishiwari added that the Aloha Program for consumers had grown to over 65,000 members since its launch in 2013. This platform enabled consumers to learn about Hawaiian history and culture and offered monthly webinars and cultural blitzes. The Aloha Reading Club had been introduced in 2025 and offered opportunities to learn the Hawaiian language and hula. These initiatives were to continue in 2026.

Educational Travel Promotion

Ms. Ishiwari explained that this had been conducted in collaboration with the Ministry of Education since 2024. FAM tours for educators had enabled them to experience firsthand the impressive educational content available for student trips, and these tours were to continue during 2026. Hybrid seminars were to feature teachers involved in travel programs as presenters, while collaboration with industry media was expected to increase exposure.

Ms. Goo thanked Ms. Ishiwari for this presentation and invited questions from committee members.

Chair Agas remarked that the comments regarding the prospect of one in three Japanese being over the age of 65 by the year 2036 were insightful and presented a new segment of target visitors. She expressed support for the island-specific targets and emphasized the importance of promoting multi-island stays.

Member Lazaro indicated interest in seeing increased focus on Maui, while Member Guy expressed a desire for more attention to be given to Kauaʻi.

Chair Agas asked whether there were any initiatives aimed at increasing the length of stay for Japanese visitors.

Ms. Ishiwari replied that many affluent Japanese visitors already owned condominiums or timeshares, and these individuals were being targeted for neighbor island visits. She explained that such visitors tended to stay longer, and the team hoped to develop content showcasing available activities in the neighbor islands to encourage extended stays and multi-island travel.

Chair Agas responded that she looked forward to seeing the Japanese travel market recover and strengthen over the coming years.

Member Lazaro acknowledged that Japanese visitors were highly conscious of and respectful toward the Hawaiian Islands. He asked Ms. Ishiwari whether she had observed an increase in visitation to areas of Maui beyond Lahaina.

Ms. Ishiwari responded that they had collaborated with major travel agencies, including JTB and HIS, to create packages for both Maui and the Island of Hawaiʻi. She noted that while visitor arrivals had not yet shown a significant increase, there had been numerous media inquiries. HTJ aimed to encourage visitation by sharing the deeper cultural and experiential narratives of each island.

Member Lazaro commented that many promotional efforts in Japan had involved Hawaiian cultural activities such as hula. He asked how Japanese visitors who had attended Hawaiian cultural events were being encouraged to return.

Ms. Ishiwari replied that once a Japanese visitor had experienced Hawaiʻi, they often became a repeat visitor, returning because they appreciated the aloha spirit and Hawaiian culture, and because they consistently sought new experiences. She added that the large viewership of a YouTube series had consistently cited the weather and the atmosphere as reasons for their preference for Hawaiʻi.

Ms. Ishiwari informed committee members that HTJ had commissioned a market study that would provide deeper insights into the Japan market. They expected to present this study to the Branding Committee and the full Board by the end of 2025.

An online question was submitted by Mr. David Uchiyama, an HTA staff member, who asked whether there was any indication of booking pace from the Japan market for the second quarter of 2026 and beyond.

Ms. Ishiwari responded that she did not have the relevant data for 2026 at that time, but that Mr. Ryuta Teramoto, Executive Director of HTJ, would be better positioned to provide that information.

Ms. Sue Kanaho from Kauaʻi submitted a comment that Kauaʻi possessed a valuable resource in Kumu Troy, who frequently traveled to Japan.

Chair Agas thanked Ms. Ishiwari for her presentation.

d. Hawaiʻi Tourism Korea

Ms. Goo introduced Ms. Irene Lee, Country Director of Hawaiʻi Tourism Korea (HTK), who presented market insights and strategic considerations for 2026. Korea was identified as one of the most promising markets for Hawaiʻi, having entered 2025 with significant momentum.

Ms. Lee outlined three key drivers that made Hawaiʻi exceptionally attractive to Korean visitors. She noted that public confidence had been restored after the presidential election of June 2025, which had concluded a period of political instability. Despite the political turmoil during the first half of the year, Korean citizens had continued to travel abroad. The new administration had fostered a renewed willingness among the population to invest in experiential activities, including international travel.

Consumer confidence had increased, and optimism about the future had become more widespread. Most notably, travel sentiment remained strong, with a growing number of Koreans prioritizing experience-focused travel expenditures, an alignment well-suited to Hawaii's offerings.

Ms. Lee shared demographic and travel data to illustrate the market's potential, noting that Korea's population stood at 51 million. This reflected a rebound in 2024 for the first time in nine years and was attributed to government policies addressing the country's historically low fertility rate, ranked the lowest among OECD nations, including Japan.

Between January and August 2025, Koreans had undertaken over 19 million overseas trips, representing a 2.8% year-on-year increase and projecting 30 million outbound trips by the year-end, marking a historic high. Ms. Lee pointed out that this was a remarkable volume of international travel given Korea's population size.

Ms. Lee reminded committee members that Korea held the world's second most powerful passport in terms of travel freedom. She added that approximately 68% of the population possessed valid passports, a figure significantly higher than Japan (19%) and China (11%), underscoring Korea's status as a nation of avid travelers.

The economic forecast for Korea indicated a steady growth rate of 1.8% for 2026, and the market demonstrated both scale and spending capacity.

Ms. Lee highlighted four major travel trends in Korea that aligned closely with Hawaii's tourism profile:

- **Wellness and All-Inclusive Travel**: Wellness and all-inclusive experiences had become increasingly popular. 44% of Korean travelers preferred all-inclusive packages, while 61% prioritized wellness and retreat-based travel. Ms. Lee pointed out that Hawaii's spa resorts, yoga retreats, wellness-focused activities, and healthy culinary options were highly appealing to this market segment.
- **Authentic and Nature-Based Experiences**: Authenticity held growing importance. 73% of Korean travelers visited local markets, and 69% prioritized nature-based experiences. Hawaii's local farmers' markets, cultural offerings, and pristine natural environments were well-positioned to meet these preferences.

- **Sports-Themed Travel**: Sports-related travel was expanding rapidly. 48% of Korean travelers aged 25–34 planned trips around sports events. Activities such as marathons, golf tournaments, and water sports presented strong opportunities for Hawaiʻi.
- **Digital and AI-Driven Planning**: Ms. Lee informed committee members that digital tools and artificial intelligence (AI) were reshaping travel planning in Korea. 43% of bookings were made via mobile platforms, 68% were influenced by social media content, and 20% of travelers used AI tools to personalize itineraries. These trends indicated key areas for targeted marketing efforts.

Ms. Lee noted that Hawaii's recovery in the Korean market was particularly robust compared with other Asian markets. Korean travel had returned to nearly 70% of pre-pandemic levels, and although arrivals in 2025 had remained relatively flat compared with 2024, projections for 2026 indicated modest growth, with strong performance across quality metrics.

Ms. Lee reminded committee members that the 8.3-day average duration of stay for Korean visitors represented an increase of 9.2% compared to 2019. Per-person-per-day (PPPD) spending reached $323, a 13% increase over 2019 levels, placing Korea just behind China in terms of this metric.

Airlift capacity had recovered to 98% of pre-pandemic levels. The scheduled November 2025 exit of Hawaiian Airlines from the Korean market was not expected to cause any decline in visitor numbers. For the upcoming winter season, 19 non-stop flights from Seoul to Honolulu were scheduled, operated by Korean Air, Asiana Airlines, and Air Premia. The last airline was a new hybrid carrier in the Korean market, having launched its service to Honolulu in July 2025. Air Premia was expected to increase its frequency from four weekly flights to daily service.

Ms. Lee informed committee members that the 2026 airlift focus would be on three key areas:

- Strengthening the partnership with existing carriers such as Korean Air and Asiana Airlines to drive high load factors;
- Supporting growth in frequency for Asiana Airlines and Air Premia to stimulate an increase to daily services;
- Developing opportunities with low-cost carriers (LCC) Trinity Airways and Jin Air. Ms. Lee added that Trinity Airways had formerly been known as T'way Air and was now one of the largest hotel and resort companies in Korea. The company was extending

their investment into international markets and had begun investment in Hawai'i by acquiring the Waikiki Resort last year. Trinity Airways was hoping to launch a service to Honolulu by the fourth quarter of 2026 or early 2027. Ms. Lee informed committee members that Jin Air was the LCC brand of Korean Air, designed to compete with Air Premia and Trinity Airways to maintain Korean Air's market leadership in Hawai'i.

Ms. Lee's summary was that overall airlift capacity out of the Korean market looked positive for the coming years.

Target Audience Profile
Ms. Lee informed committee members that the 2026 target audience profile comprised

- mindful travelers
- mainstreamers
- romantic couples
- affluent travelers
- outdoor enthusiasts
- free independent travelers (FITs)

Core Brand Message and Strategy
"All Ways Hawai'i" had been designated as the title of the 2026 campaign and was intended to reflect the aspirations of Korean travelers. The message carried a dual meaning, with "All Ways" representing the diverse experiences available across the Hawaiian Islands, while "always," suggested Hawaii's enduring inspiration.

Ms. Lee added that the brand strategy was structured around four pillars:

- comprehensive appeal
- showcase versatility
- dual meaning
- brand identity

These pillars directly addressed previously identified Korean travel trends.

Campaign Programs
The campaign was to comprise five distinct promotions: signature travel, mindful travel, made-in-Hawai'i, the Hawaiian Islands, and AI travel.

A second campaign, titled "*Your One and Only Hawai'i*," was introduced to target the premium travel and romance travel markets.

New Initiatives for the Coming Year

Ms. Lee outlined two new initiatives for 2026:

- **Sports tourism** would leverage events such as the Honolulu Marathon to develop products in collaboration with Korean tour operators. The initiative aimed to generate consumer engagement through partnerships with consumer brands and planned to involve celebrities to promote these events across media platforms and other sports-related activities.
- **Smart tourism** would promote personalized Hawaiʻi itineraries through AI-driven recommendations. Ms. Lee added that this initiative would involve partnership with a Korean OTA and online media outlets for consumer promotion events.

Ms. Lee added that Korea represented a significant opportunity for Hawaiʻi tourism in 2026.

Ms. Goo thanked Ms. Lee for her presentation and invited questions and comments from the committee.

Member Lazaro reminded Ms. Lee not to overlook the Kauaʻi Marathon, noting substantial participation from Korean athletes and families during the 2025 edition.

Chair Agas noted that both Ms. Lee and Mr. Walshe had discussed the expansion of sports tourism. She emphasized the importance of including smaller-scale events and recommended working closely with the HTA Sports Manager, Mr. Lafitaga, to increase exposure to sports events across the islands.

Chair Agas thanked Ms. Lee for her presentation and recognized the presence of two non-voting HTA Board members, Members Elmore and Guy, and acknowledged the presence of Eseta Malufau from Senator DeCoite's office.

e. Hawai'i Tourism China

Ms. Goo introduced Mr. Dennis Suo, the Managing Director of HTC.

Mr. Suo outlined the 2026 Brand Marketing Strategy, noting that the China market appeared to be rebounding, with 145 million trips outside China forecast for 2025.

Mr. Suo introduced the five team members of HTC, who were based between Shanghai and Hong Kong. He added that this team had spent several years promoting Hawaiʻi to the Greater China market.

Target Audience:

The target audience remained consistent, comprising three segments:

- Millennium individualists
- Multi-generational families
- High net worth individuals

The team saw no reason to revise the target audience, as it had remained stable over the years. These groups prioritized authenticity, comfort, and exclusivity. They sought deeper cultural immersion, traveled frequently to distant destinations, and valued experiences that aligned closely with those offered by Hawaiʻi . Mr. Suo added that Hawaiʻi visitors often mentioned these features in Chinese social media on their return.

Strategic Framework:
The strategy was referred to as the "frequency framework," emphasizing layered content and the activation of key seasonal periods. These included the Chinese New Year, typically falling during Hawaii's shoulder season in February, as well as Golden Week, a weeklong holiday occurring in early October.

The "frequency framework," strategy leveraged anchor moments such as cultural events including the Merrie Monarch Festival, the King Kamehameha Celebration, the Hawaiʻi Wine Festival, the Kona Coffee Festival, and the Honolulu Marathon. These monthly anchor moments were intended to provide travel trade planners with timely themes for itinerary and product design. This approach aimed to drive consistent brand visibility and conversion throughout the year, with the ultimate objective remaining conversion of interest into booking.

Mr. Suo commented that the 2026 FIFA World Cup was to take place in North America, with 14 matches hosted in California, and presenting a strategic opportunity for Hawaiʻi .

Social Media Marketing Strategy:
Mr. Suo reminded committee members that content remained central to the marketing approach. The HTC team continued to blend various formats, including long-form articles, vlogs, influencer travel diaries, and campaign activations across major Chinese social media platforms such as WeChat, Weibo, Douyin (TikTok's Chinese counterpart), and Little Red Book. The goal was to drive engagement and inspire personalized travel experiences, with key data values embedded in search engine-optimized posts.

Core Messaging for 2026:
The Chinese-language slogan which translated to, "*Discover Aloha, Live the Dream*," encapsulated both the emotional and inspirational spirit of Hawaiʻi visits. "Aloha" symbolized authentic connection and hospitality, resonating strongly with Gen Z and

millennial travelers who sought meaningful, self-guided experiences. The FIT market had become the dominant segment, particularly among younger demographics.

Mr. Suo pointed out that cultural nuances were optimized for Chinese digital platforms to ensure hashtag compatibility and ease of sharing. The messaging reinforced Hawaii's identity as a welcoming, safe, and diverse destination, and this was especially relevant in the context of evolving global geopolitical dynamics.

Travel Trade Education:
Mr. Suo stated that the cornerstone of the market strategy remained travel trade engagement. HTC continued to collaborate with leading OTAs, major airline partners, and the U.S. Embassy, as well as the U.S. Consulate Commercial Service network across Tier 1 cities. These partnerships facilitated trade education sessions and updates on U.S. visa application procedures. FAM trip opportunities were offered to ensure accurate and culturally aligned messaging across all sales channels.

To showcase each island's unique identity, HTC had developed multi-island concepts to assist travel trade professionals and influencers to present the rich diversity of the Hawaiʻi archipelago, with QR codes linking to social media accounts embedded in promotional materials.

Major Campaigns for 2026:

- "*Coffee Meets Culture*" positioned coffee as a storytelling medium. This agritourism campaign connected Hawaiʻi -grown coffee with cultural sustainability and local heritage. Activities included tasting events, farm visits, and influencer storytelling. The campaign aimed to elevate Hawaiʻi coffee from a souvenir to a meaningful memory. Partners included USDA, the State of Hawaiʻi Office in Beijing (SHOB), and the Hawaiʻi Coffee Association.
- The Road-Trip Influencer-Led Campaign, in partnership with Hertz Rental Car, was to launch a multi-island vlog series beginning with Oʻahu and Hawaiʻi Island. Influencers would highlight scenic drives, cultural landmarks, local farms, dining venues, and boutiques. This campaign had been planned in response to growing demand from Gen Z and millennial FITs for self-guided experiences and it would promote regenerative tourism through curated, responsible exploration routes.
- The Rainbow Eco Campaign was to feature a seven-color eco-bag series tied to digital content in collaboration with Trip.com and an airline partner. Participants who collected all seven colors would be eligible to win a round-trip ticket between China and Hawaiʻi . This interactive initiative celebrated Hawaii's diversity and environmental values.

- The 2026 Lunar New Year (LNY) WeChat Red Envelope Campaign would build on prior success, where 2,000 digital red envelopes had been claimed within one hour. The 2026 campaign would be expanded to OTAs and retail partners. Mr. Suo commented that in Chinese culture 2026 marked the Year of the Horse which symbolized strength, freedom, and prosperity. This promotion would align with the *Mana* of the horse, with OTA partners distributing digital red envelopes as festive tokens to customers booking Hawaiʻi packages during the LNY season, with the intent to amplify both bookings and brand visibility.

Winter Season Packages:
Mr. Suo outlined the winter season packages being marketed by partners. One of HTC's Beijing partners was promoting an ice-and-fire package entitled "*Aloha Aurora*," which took travelers from Fairbanks, Alaska to the volcanic landscapes of Hawaiʻi , offering a distinctive two-week journey from snow-covered terrain to a tropical island setting.

2026 Trade Mission:
Building on the success of the 2025 trade missions in both Shanghai and Macao, where HTC participated in the Macao International Tourism Expo alongside stakeholders, the 2026 mission was set to focus on Eastern China, specifically Hangzhou and Nanjing. Strategic partnerships were to be established with Alibaba, Fliggy, Tuniu.com, and WeChat's travel platform. This initiative would extend HTC's regional reach as well as strengthening its collaboration with major OTAs. Mr. Suo added that HTC planned to broaden its engagement by tapping into a different region each year.

Mr. Suo noted that in 2026 HTC was to celebrate 40 years of Hawaii's ties with Guangdong Province and 33 years with Hainan Province. A Hawaiʻi State delegation, including legislators, representatives from DBEDT and the University of Hawaiʻi (UH), and coffee industry leaders, along with members of the local Chinese community, were to take part in ceremonies and celebrations in Guangdong Province. Mr. Suo commented that HTC would continue to leverage these sister-state relationships, with key programs such as the promotion of UH sports and initiatives to encourage more Chinese students to pursue education in Hawaiʻi .

Partnership Opportunities:
Mr. Suo noted that all partnership opportunities had been published on the HTA website. Stakeholders were encouraged to contact HTC for further details and would be welcomed to join the 2026 Trade Mission to Eastern China.

Ms. Goo thanked Mr. Suo for his presentation, confirming that there were no questions from either the committee or the audience.

f. Hawaiʻi Tourism Taiwan

Ms. Goo introduced Mr. Andrew Koh, the Managing Director of Hawaiʻi Tourism Taiwan (HTT), noting that this market segment had been paused since early 2020 and welcoming HTT back into the HTA portfolio.

Thanking Mr. Suo for his presentation, Mr. Koh presented the 2026 Brand Management Plan, beginning with introducing the five other members of the HTT team.

Mr. Koh noted that the HTT target audience comprised three major groups;

- Silver Travelers (60+)
- Family Travelers
- LGBTQ+

2026 Market Strategy

Mr. Koh acknowledged the growing importance of high-value, conscious travelers in the Taiwan market, particularly the “silver traveler” segment. Taiwan, like other Asian countries, was experiencing a demographic shift toward an aging population. Silver travelers represented a fast-growing segment, showing approximately 70% growth over the previous decade and demonstrating a trend of “spending the kids’ inheritance” (SKI). In a recent survey, 65% of respondents indicated a preference for investing in once-in-a-lifetime travel experiences rather than saving for inheritance, marking a departure from traditional Chinese values.

Mr. Koh added that Taiwan was recognized as the leading Asian country in marriage equality, with the LGBTQ+ community comprising approximately 10% of the population. HTT intended to actively target this group in future campaigns.

Major Campaigns and Programs

Key objectives in Taiwan included driving demand to support direct flights. Since the suspension of HTT operations in early 2020, there had been no representation in Taiwan aside from Meet Hawaiʻi, which continued to market meetings, conventions, and incentives (MCI). Mr. Koh pointed out that it was critical for HTT to reestablish its presence in the Taiwan market, to regenerate online visibility, and to strengthen brand recognition. HTT aimed to rebuild and expand the strong brand awareness possessed by Hawaiʻi tourism before the 2020 pause. Mr. Koh identified online presence as an essential foundation to position Hawaiʻi top-of-mind among Taiwanese travelers.

Strategic Initiatives

Mr. Koh outlined HTT's strategies intended to reconnect with the market through flagship programs, adopting an "always-on" communication approach via a robust marketing plan targeting both travel industry partners and consumers. HTT's efforts would focus on generating extensive online content, including video, social media, and print and digital media coverage. HTA and Hawaiʻi partners' assets would be leveraged and customized to align with Taiwanese cultural concepts.

Mr. Koh stated that HTT intended to embed an AI integration strategy within the PR framework, aimed at producing curated online articles and content optimized for AI searchability. This was to include the development of traditional Chinese prompts to enhance discoverability by AI tools. The 2026 HTT program was designed to generate buzz, exposure, and strong brand awareness in Taiwan through a mix of creative initiatives and PR tactics. These efforts aimed to produce searchable content that would surface during travel inspiration searches by individuals or AI platforms.

Mr. Koh referred to the high adoption rate of AI among Taiwan travelers, with Booking.com reporting that 88% of Taiwanese travelers relied on AI during their travel planning process, compared with 64% globally. Given Taiwan's use of traditional Chinese, which distinguished it within the global Mandarin-speaking population, the team emphasized the importance of localized content and messaging for market success.

Individual Campaign Highlight: Aloha Festival

Mr. Koh informed committee members that the two-day Aloha Festival, last held in 2018 and 2019, was a key offline marquee consumer activation event showcasing Hawaiian culture, Hawaiʻi-made products, and travel offerings. All Hawaiʻi-related stakeholders in Taiwan had participated, creating a marketplace for Hawaiʻi products and cuisine. Mr. Koh pointed out that Taiwan possessed the second-largest hula community after Japan, and the inaugural 2018 festival had been attended primarily by hula groups from Taiwan. Many hula groups from Japan, Hong Kong, and China had expressed interest in performing at the 2019 Aloha Festival.

HTT intended to revive the Aloha Festival in 2026, and this decision aligned with their decision not to participate in the Taiwan International Travel Fair, which had become dominated by bargain-seeking consumers. Mr. Koh pointed out that this demographic was not aligned with HTT's target market, hence HTT's decision to prioritize the Aloha Festival instead.

Airlines and tour partners offering exclusive promotions and packages were to be invited to participate onsite with the aim of driving conversion from interest to bookings. The festival would serve as a blend of culture, cuisine, music, and trade engagement, bringing to life the message “The People, the Place, the Hawaiian Islands,” aiming to promote responsible tourism, and fostering lasting emotional connections with Taiwanese travelers.

Taiwan Market Activation

Mr. Koh reviewed plans for the Hawaiʻi Sales Mission in Taipei, which aimed to expand Hawaii’s presence in the Taiwan market by leveraging the momentum of the Aloha Festival. The two events were to be combined in a coordinated effort to engage both consumers and the travel trade. The Sales Mission would comprise four integrated programs:

- marketing briefing breakfast;
- B2B seminars;
- targeted trade visits;
- curated media gathering.

The Trade Mission would incorporate participation in the Aloha Festival, thus ensuring that Hawaiʻi-based partners joining the initiative would experience the energy and cultural resonance of the festival.

Online Campaigns

The “Mother of Lei” campaign was scheduled around the time of Mother’s Day and was designed as a social media initiative in partnership with local artisans and flower shops. A lei-making studio was to be launched in which the public could create their own leis while learning about the origin, etiquette, and cultural significance of the lei. The story of the lei was to be narrated in a visually compelling format by HTT’s owned digital platforms, influencers, and lifestyle media.

Media Partnerships

Mr. Koh informed committee members that the “*Islands of Style*” media partnership would form a key strategy for the regeneration of Hawaii’s online presence and brand visibility in Taiwan. Collaborations with lifestyle and fashion media would reposition Hawaiʻi on the cultural map, with top international media groups featuring a special Hawaiʻi-themed edition along with one-time features and a quarterly “Editor’s Selection” column in targeted outlets.

Influencer Strategy: Aloha Ambassador Program

Mr. Koh identified the Aloha Ambassador Influencer Program as a major initiative under the “always-on” media strategy. Continuous online presence during 2026 was to be ensured by inviting twelve carefully selected mega- or micro-influencers to share authentic stories conveying the aloha spirit, cultural heritage, outdoor adventure, cuisine, and meaningful community connections. Mr. Koh added that, while highlighting immersive, responsible experiences, each influencer would also be expected to promote mindful travel, with emphasis on respect for the *ʻāina* and the local community.

This campaign was designed to drive conversion, with influencer content cross-promoting curated travel products from OTAs and boutique agencies, and with the additional aim of stimulating bookings and generating demand within the MCI segment.

Digital Co-op: *Hele Mai Hawaiʻi*

Mr. Koh explained that the "*Hele Mai Hawaiʻi*" OTA Digital Co-op scheduled to run from May to July 2026 would target tech-savvy, self-guided travelers, and would feature curated travel products, a branded landing page, and influencer-generated content tailored to audiences seeking flexible and meaningful travel experiences.

Travel Trade Partnerships

HTT was to partner with consortia including PAK and other agencies as well as boutique agency co-operatives. Collaborations with wholesalers were expected to deliver high-value products to a broader market, enhancing Hawaii's visibility among competing destinations. Simultaneously, boutique agencies would offer flexibility in designing customized itineraries with influencer campaigns positioned to showcase Hawaii's distinct culture directly to Taiwanese travelers.

Public Relations and Social Media

Mr. Koh outlined a continuous PR approach, with distribution of news releases tailored to resonate with the target audience and aimed at maximizing media content output. Social media efforts would not only promote Hawaiʻi as a destination but would also educate Taiwanese audiences on Hawaii's unique culture, heritage, language, and products. Examples of proposed content were included in the presentation shared with committee members.

Partnership Opportunities

A summary of partnership opportunities was provided in the accompanying handout.

Chair Agas thanked Mr. Koh for his presentation and referred to Mr. Uchiyama's earlier inquiry about booking pace updates for the second quarter of 2026. Mr. Koh replied that the data were not immediately available but could be provided at a later time. The Chair noted that stakeholders were concerned about the 2026 outlook and forecast, and Mr. Koh assured the committee that the requested information would be made available.

g. Hawaiʻi Tourism Canada

Ms. Goo introduced Mr. Colin Wood, Account Director for Hawaiʻi Tourism Canada (HTCAN). Mr. Wood presented HTCAN's eleven-member team.

2026 Target Audience:
Mr. Wood stated that the 2026 target audience focused on affluent travelers, noting that there were subsegments within this group with increased likelihood of longer stays, higher spending, multi-island visits, and repeat visitation. These travelers were generally less sensitive to price and currency fluctuations and had annual household incomes exceeding $100,000. Two key subsegments were:

- Active travelers and experience seekers, whose activities included physical pursuits as well as cultural, historical, and culinary exploration.
- Snowbirds and retirees, who tended to stay for longer durations and live like locals. Canadians were particularly well known for this travel pattern.

Mr. Wood reported that 70% of Canadian visits to Hawaiʻi originated from British Columbia and Alberta, while Ontario accounted for 36% of Canadian visitors to Hawaiʻi. He added that although visitor activity was concentrated in western Canada, HTCAN also targeted the remainder of the country.

Mr. Wood noted that Canadian travel trends had shifted toward experience-driven vacations, fewer but longer trips, and a willingness to spend for value. Other key priorities were solo travel, self-fulfillment, and sustainability, and these preferences aligned well with Hawaii's strengths, including the aloha spirit, rich history and culture, in-destination safety, unique experiences, *kuleana*, and *mālama*.

HTCAN's 2026 tactics and strategies aimed to reinforce Hawaii's image as a welcoming destination. Mr. Wood noted that Canadians sometimes felt uncomfortable in the continental United States, but viewed Hawaiʻi differently: as beautiful, relaxing, safe, and offering unique and memorable experiences.

HTCAN had previously utilized resources themed "The people, the place, the culture," and expected to develop and incorporate further content on this theme using a blend of online and offline tactics. Mr. Wood added that he had been inspired by the diverse approaches and tactics seen in the presentations of the other global marketing teams.

Consumer Direct Strategy:
Mr. Wood explained that HTCAN's objective was to inspire mindful travel by preparing visitors for safe and responsible experiences. This included promoting respect for Hawaii's culture, people, and environment, and encouraging support for local businesses. These efforts were to be aligned with market-specific key performance indicators (KPIs).

Mr. Wood commented that Canadian AI search results were often populated with US-based content, and HTCAN proposed to ensure that Hawaiʻi would be discoverable by Canadian audiences by enhancing Canadian-specific content on gohawaii.com/ca.

Consumer Direct Tactics:

- A multi-platform, custom content-driven TV integration campaign with Bell and Bloomberg Media was to target affluent travelers and would be supported by social amplification and online video extensions.
- Social media initiatives included tests of new TikTok and Pinterest segments, alongside continued use of Facebook and Instagram channels (both organic and paid).
- Digital campaigns were to include online video, connected TV, retargeting searches, and programmatic display advertising.
- Mr. Wood noted that cooperative campaigns with Canadian market partners offered a 1:3 value ratio and added that incorporating mindful traveler education was a condition of participation by partners.

Public Relations Initiatives for 2026:

- Spring 2026 influencer group FAM trip highlighting wellness, adventure, culinary, and cultural themes for two to three influencers, noting the challenge that many influencers' audiences were primarily American
- Fall 2026 group media FAM trip for four journalists, covering two islands under the theme "*Beyond the Bucket List*," featuring must-see and lesser-known attractions
- Individual media visits throughout the year
- Participation in the TMAC Conference for trade and travel media in Spring 2026 in Richmond, British Columbia
- Attendance at Discover America Media Day in Fall 2026 in Toronto, Ontario, with ten one-on-one appointments with local media
- Broadcast segments featuring on-air personalities narrating Hawaii's story
- Media partnerships throughout the year

Travel Trade Activity:
Mr. Wood pointed out that the foundation for travel trade activity was education and training delivered through webinars, in-person events, and bite-sized content. He added that travel agents responded well to smaller, continuous updates, whereas destination specialist programs tended to be longer and more detailed.

HTCAN was to collaborate with key travel trade media platforms to educate, inform, inspire, and update advisors and product decision-makers.

Major Programs for 2026:

- A national, bilingual TV integration campaign targeting the Quebec audience, featuring a vignette series hosted by on-air talent
  The series would showcase immersive experiences aligned with *mālama*, *kuleana*, and aloha themes, supported by social amplification and online video extensions. The campaign was expected to generate over 2.1 million impressions among affluent target audiences.
- A Lei Day activation in British Columbia and Vancouver on May 1st
  Although this date was outside the peak Canadian booking period, this high-visibility initiative was expected to foster friendship, affinity, education, and aloha, and would include school visits and lei greetings for politicians.
- A Spring 2026 influencer FAM group visit to islands yet to be announced
  Mr. Wood commented that this was intended to increase exposure to new audiences and raise awareness of luxury advisory products.
- Cooperative campaigns during the peak booking season
  Partners such as Air Canada, WestJet, Flight Centre, and Costco Travel were to be involved.
- Aloha Canada
  This event had not been held for over twenty years and was scheduled for December 2026 in Toronto, Calgary, and Vancouver. The initiative would focus on travel advisor education and would include media events with cultural components in Toronto and Vancouver. Cooperative partners were expected to attend, with the goal of inspiring trade advisors and using key partnerships to convert interest into bookings.

Mr. Wood concluded his presentation by encouraging his audience to explore partnership opportunities with HTCAN, noting that he had referred to these throughout the presentation and that HTCAN remained open to collaboration.

Ms. Goo thanked Mr. Wood and invited comments and questions.

Chair Agas expressed her appreciation for Mr. Wood's exciting initiatives and commented that industry partners had emphasized the importance of distributing influencer, group media, and video FAM visits across all islands to ensure comprehensive representation.

Mr. Wood responded that he and the PR team remained mindful of the need to include multiple islands, and acknowledged the valuable support and guidance provided by the island visitor bureaux in selecting appropriate venues for the FAM trips.

h. Brand Marketing Plan USA (page 146)

i. HTA/BSC (page 116)

Ms. Whitehead said she was excited to be in the meeting. IMEX is looking good for the year. They have 38 partners in the booth. IMEX is expecting 5,700 buyers representing over 150 countries, which is a slight increase over 2024. The meeting industry is still looking good despite all of the headwinds coming their way. They have a lot of leads for 2028 and 2029, which is exciting for the HCC. The single property team is really cranking as well. They have had a couple of appointments, especially with clients who they moved from 2026 into 2028. There is concern about timing. The HCC will be on time, and the contract will be signed this month.

Another initiative that took place that morning is an MOU that they signed with Singapore, with key messaging where the HVCB and Singapore Tourism Board are joining forces at a three-year alliance that positions Hawaiʻi and Singapore as the premier gateway duo for associations, expanding their international footprint for their locations, for their meetings. This is a relationship that started about four years ago. It is exciting to put it in writing. They had a big celebration. They had a protocol beforehand, and Aaron and the CEO of Singapore Tourism Board did a signing this morning, so there was great press around that. Another exciting initiative is Luau Hawaiʻi that they started for the first time ever this Sunday, which kicked off IMEX. They engaged the local Hawaiian community, which is very significant in Las Vegas. They have been trying to enhance their booth without the funding that they have had. They have 70 partners and clients, and they are looking to build upon this next year and make it bigger.

She spoke about technical challenges. She gave an update on 2026 initiatives. 2024 and 2025 were really the most successful years that they had at the HCC since opening. And 2025 will host 22 conventions, generating 206,000 room nights, 86,000 attendees, and more than $500 million in economic impact. They are booked solid through the end of the year. There were some leaks in the building with some groups that have been in town, but Ms. Orton has been managing that.

She reminded everyone that every meeting, convention and incentive program that comes to Hawaiʻi fuels more than hotels. According to U.S. travel, meetings and events generated $119 billion in U.S. tax revenue in 24 for Hawaiʻi. Each Citywide convention contributes directly to the general fund, dollars that support schools, infrastructure, and communities. Most of these bookings were secured short-term, which highlights one of the center's unique values.

Moving into Q4 both teams are showing strength in the pipeline. Single property is ahead of year-to-date goals for both tentative and definite bookings. On the Citywide side, the team is up 45% over goal for tentatives. But closing the business has been more difficult. The headwinds are truly clear. The geopolitical uncertainty delayed the execution of the construction contract, and aggressive competition offering free rent and heavily reduced F and B minimums and incentives that we cannot compete against. It is, without question, a buyer's market. Even with those headwinds. The team has nine verbal definites moving toward licensing, representing 66,000 attendees and a little over $281 million in future economic impact. Once the construction begins, they believe that once this begins in January, confidence will return in the destination. The industry will see that Hawaiʻi is serious and committed to repairing one of the state's most powerful economic engines. These offshore conventions do more than just fill hotel rooms. They fuel the general fund and provide the resources that they need for communities to thrive.

She spoke about compression and how the HCC drives that state. Obviously, the building is closing in 2026 and 2027. The MCI attendees spend more person, stay longer, and bring pre and post travel that ripples across every island. And the question is how to maintain that compression. Their teams have embraced adaptability. As soon as the closure was announced for 2027, they had to shift. They need to continue to keep booking 2026 and 2027 business, and have more manpower behind that, so they can support their single property team and bring business to the state in those years. 2026 is really hurting right now. 2028 and 2032 is really their recovery. They are getting a lot of leads. As the HCC reopens, they have a narrow but important opportunity to restore that confidence and demonstrate Hawaii's long term competitiveness. They are working on trying to get those global rotation cycles back, re-entering the bid process for international associations, and positioning Hawaiʻi alongside peer destinations by rebuilding long-term booking pace. Is important that their sales teams bring 2029 up to a strong booking pace next year. It is their top priority, and IMEX is going to help with that initiative.

They also just launched a campaign to infuse business into 2028 and 2029 that offers a flat rental and discounted rates for audio, visual, tech, and other ancillary items in the building that Ms. Orton really worked with them on. It is near the end of the year, but hopefully they can relaunch something at the beginning of the year to keep that momentum going. She spoke about strategies and highlighted expanding the single property incentive business, that is really important. It is a high-value market. The single property team is ahead year to date for both tentatives and definites, which really shows the strength that Hawaiʻi has outside of the HCC. Bookings, incentive meetings are high value and high spend. They are going to target verticals with growth potential. They will level up communication with their third-party planners and intermediaries and really focus on need periods guided by sightline and simple view analytics. MCI business helps to fill the shoulder season. So, it's a great opportunity to focus on that with the single property team. Second is really making sure that they keep a strong presence globally with the geopolitical situation.

Looking ahead, KPIs must evolve. Room nights are always going to matter, along with economic impact and attendance. They are redefining success to include client satisfaction and the new legacy impact framework on client satisfaction. Every group will now receive a post-event survey. The client services team will lead this effort in partnership with HCC's event management team, ensuring they evaluate the entire process. It will show where Hawaiʻi is excelling compared to our competitors and where they need to adapt. The key now is to evaluate how Hawaiʻi is doing from a response standpoint, a service standpoint, and where they identify needs where they can make an impact and easily ramp up. Legacy is another area where they increased KPIs. Meetings, conventions, and incentives have always been a natural driver of regenerative tourism. By measuring both satisfaction and legacy, they are proving that Hawaii's MCI sector is not just delivering economic results, but also contributing to the workforce, to education, to culture, and to the long-term health of communities, which is what makes meetings in Hawaiʻi meaningful.

Member Fischer said it seems there is a lot of focus on the HCC. He got the sense that it may be potentially stifling some of the business coming to the islands. He was curious about the opportunity and what she was hearing at IMEX with regards to other options available.

Ms. Whitehead said the presentation does lean heavily on the center business just because there is a deficit in 2026 and 2027. She wants everyone to know that they have strategies behind that to support all islands and try to create that compression that they are losing. When they visit other islands, they meet and specifically talk about strategies for each island. They highlight the HCC because what they see now, without the HCC business coming in, all of the islands are hurting because they are missing that compression that would usually drive them to other islands if they did not have that availability there. They want to have strategies for each island.

Member Fischer said he feels that there is a lot more activity on the other islands with the big conferences. He said there is a great opportunity there.

Ms. Whitehead said the unique selling point that Hawaiʻi has is that it can actually create rotations within the state, within each island, because each island is so unique.

Dr. Salā said part and parcel of the success of this work really is dependent on the HCC getting done on time. Citywide will divide large groups, and pieces of these groups will go to separate islands. They are nervous about the HCC getting done on time. The key to the maintenance of the success and sort of trust from the industry is dependent on their being able to do that. So, whatever they can do to support the HTA is key to maintaining this sector.

Chair Agas thanked Dr. Salā and Ms. Whitehead. She asked about the improvement on the booth and asked what they could do to help with that at a later stage.

Dr. Salā said the reason why they decided to start the luau this year was an opportunity for them to fix the booth, but also to engage a native Hawaiian and local Hawaiʻi community in the diaspora. They need to update the booth.

Dr. Salā said the presentation sets the stage with the current market situation in the U.S. market, further setting the foundation for the way that the HVCB, under the auspices of the HTUSA in this case, contemplates its work. Distinct from the other GM plans, their work with the HVCB in this case is a branding contract. It is not just a direct sales contract. This might seem a bit distinct from the quality of the other presentations today, and he would like feedback in terms of how they drive down the funnel. That is key to the success of their work. He said year to date through July of this year, the market saw growth in visitation at 110% of 2019 numbers and 77% of overall visitation to Hawaiʻi, an increase of 17% from 2019. He noted that 2019 is a rather dangerous benchmark for them to use. He encouraged the Board to think about how the GMTs should be articulating the benchmarks, depending on whether it is year over year. However, this tells them that the U.S. market remains the primary engine behind Hawaii's ongoing tourism recovery. U.S. visitor spending is at a record high, with total spending up 45% over 2019, with person per day spend up 37%. This marks a significant increase in economic impact for the state. U.S. arrivals have increased 8.5% from pre-pandemic levels and are up 2.2% for July year to date. The daily census is up 5.6%, particularly driven by growth in the U.S. region.

Through July, the U.S. market is up. One of the challenges they have is that the U.S. Market does not spend the way Canada and Japan spend. Trying to manage the gap is really key. That points to some headwinds that they are now seeing. The month of July, measured year over year, saw both a decline in visitor arrivals and meaningful reductions in domestic airlift. This is a big challenge, especially going into 2026. Reasons for this are multi-fold. Costs are on the rise, the effects of inflation, the weaker dollar, growth has lagged, wage growth has lagged, and competition. The dramatically diminished level of marketing funding at some point is going to start to take effect now. Hawaiʻi as an aspirational destination means that sun, sand, and Surf are sort of traditional brand, are enough to help get people on planes. Because the marketing funding has diminished dramatically, they are fighting head-to-head with other destinations like Mexico, Aruba, Costa Rica, etc. And so, what drives consumer demand, consumer decision making, is cost. They need to re-elevate the quality of the brand, which is key to the success of U.S. moving forward in the market. Total spending is up 33% versus 2019, but down 3% year over year. U.S. West saw a notable drop compared to last July, though both U.S. West and U.S. East still deliver spending far above pre-pandemic levels. So, the headwinds are there. They are starting to see some chaos in the ecosystem. They want to try to level out that chaos so that people are making sound judgments and sound decisions. Airlift remains one of the most critical factors shaping Hawaii's visitor industry, determining not only where travelers come from, but also when they arrive. For now, domestic lift is essentially flat compared to last year. However, by the first half of 2026, they expect a modest rebound, with overall seat capacity climbing just over 5%. These shifts in air access have real implications for trip timing and visitor origination, which is why they monitor them so closely.

Hawaiian Airlines, for example, will suspend its long-haul service to Boston this November, but redeploy those aircraft to strengthen high-demand domestic routes LAX to Honolulu will add an extra daily flight during peak holiday and spring windows, while Honolulu to Seattle expands to four daily widebody flights, adding critical capacity from two of the largest gateways. American Airlines is restoring non-stop service from Chicago to Honolulu and from Dallas to Kona, making Hawaiʻi more accessible to travelers from the Midwest and Texas. Delta is adding Salt Lake City to Kona during the winter. And Southwest continues to optimize its red-eye departures from the islands, opening up more overnight connections for East Coast visitors. He met with Mayor Alameda's team on the Big Island last week, and they will be working with them. They requested to see if it would be possible to do a late-night flight from Honolulu back to Hilo so that residents from Big Island who are in meetings or have events can get home later in the evening. They have also asked them to help them design a Southwest Hilo Las Vegas flight. The counties are starting to really get thankfully interested and energized around air access. Collectively, these adjustments enhance schedule flexibility and broaden reach across Hawaii's key origin markets, ensuring the state is ready to capture renewed demand as travel rebounds in 2026.

He spoke about the regenerative tourism framework. Chapter 201B defines regenerative tourism as those practices that contribute to the restoration and enhancement of local ecosystems, adhere to sustainable practices, respect and preserve local culture, and support the local communities. Further implements an innovative and sustainable economic development plan to make net positive contributions, create conditions that allow communities to flourish, engage in collaborative efforts that provide visitors with genuine, meaningful experiences, improve the destination for current and future generations, as well as for the well-being of the environment, residents, indigenous communities, and visitors. Act 128 sets forth a framework to structure the mandate committing the state to a regenerative visitor industry, prioritizing markets that align with its values. What is key is placing residents at the center of your work. He is trying to take the work that they do in terms of storytelling on behalf of the state and create a grid that helps operationalize the creative.

They have a series of derivations of regeneration and a series of domains. Each derivation must derive regeneration across the domains in the ecosystem. They want to evolve how they think about doing the work industry-wide with the community. They are to represent a holistic value system that is grounded in Hawaii's unique worldview.

The lives inside of this brand ethos are called Ola Hawaiʻi, a foundational value system inspired and informed by Hawaiʻi that guides and directs all of their decision-making. Regenerative tourism for them is about life first, and if they get this part right, because failure is not an option, this ultimately means more resilience across the ecosystem. This will mean that Hawaiʻi comes to serve as a living model for the entire world. He spoke about the philosophy and where it takes them in practice. Their plan for 2026 begins with clarity around their audience, the Hawaiʻi target traveler. Their target traveler is curious, respectful, values-driven, and seeks meaning, a reflection, and a deeper relationship with place. To bring this a bit closer to the ground, the Hawaiʻi target traveler is a person who lives their values in travel as they do at home.

The audience framework, the definition of a high spending visitor narrows through successive qualifiers. So, in the U.S. they start with an adult demographic that is age 25 to 54. There are about 256 million of these persons in the U.S. Household income is $150,000 or larger. So, of this 256, this breaks it down to 61.75. The long-distance traveler is someone who has taken an international trip by air in the last three years or a domestic trip by air in the last 12 months. That takes that 61 down to 22. And then they do a few value-based filters. Travelers demonstrating participation in activities on vacation have attitudes and motivations aligned with Hawaii's vision, including being values-driven, respectful of culture and environment, seeking meaningful, intentional experiences. That takes 22 down to 14. And within that 14, they have a Hawaii target traveler, a core audience most likely to travel responsibly, respect culture and community, and support Hawaii's economic and regenerative goals. So, there is some language that asks how the HVCB or the HTA ultimately is going to drive the high spend traveler. Now they do not articulate the Hawaii target traveler as a high spend traveler. However, by default, the Hawaii target traveler does make an affluent income as a sort of given to us by MMGY and the other data-driven science that they use to make decisions about the work that we do. What is really important is that the messaging of that is not in affluence or not in high spend, but in the Hawaii target traveler. Traditional advertising still does have its place, but discovery now happens on social media.

Their media mix reflects that shift and reinforces Hawaii's value through advanced television and video, shows up in social at the point of discovery, and owns the moment of decision-making in search. It is precise, it is data-driven, and it is designed for travelers who are looking for more than the cheapest ticket. Whereas paid media is one side of the coin, earned media stands on the integrity of their brand and builds the credibility that no ad can buy. And as people are starting to use more and more AI, more ChatGPT in their decision-making, what they know is that AI builds on earned media more than paid media. Developing the earned media side of this work is going to be key for us. Three key strategies - one, digital-first channels where travelers consume content, two, community-centered storytelling that elevates local voices, and three, Hawaii stories must surface in AI-powered trip planning platforms. Once they have sparked interest through media, they reinforce that messaging through the trusted voices of travel advisors, who are still very key personnel who continue to remain critical to Hawaii's tourism ecosystem. Advisors carry Hawaii's story abroad, helping to disperse visitors, supporting regenerative behaviors, and strengthening the relationship between travelers and place, reinforcing the values for which they stand.

The HVCB is taking a renewed look at the way that they do travel trade, how they do travel trade, and with whom they do travel trade with. They are starting to evolve the whole destination education pillar that will happen in 2026. Regenerative tourism is about importing good people and exporting better humans as a result of their experience in and with their home. It is a stake a claim for the power that Hawaiʻi has over the world, they are calling their 2026 campaign Hawaiʻi stays with you. Through the eyes of visitors, guided by the people of this place, from the very heart and soul of Hawaiʻi, this campaign reveals the moments that matter most. Family playing together on a beach, friends sharing a meal, playing, and enjoying good music. The message is simple but profound. The land, the people, the stories of Hawaiʻi do not leave you. They imprint upon you. They travel home with you. And if they have done their work well, Hawaiʻi stays with the traveler. And Hawaiʻi staying with them allows them to continue to tell Hawaiʻi story to friends, family, etc.

Dr. Salā showed some of the mood boards that they are working on right now. The mod boards are an effort to express how the campaign comes to life. The creative is cinematic but intimate. It is energetic but profound. Visually, there is not just a way to show Hawaii's beauty. It is to show connection. They are trying to design an opportunity to engage the film industry in the campaign for next year, just in an effort for the HVCB to figure out how they are supporting the

efforts of "film industry tourism." He will ensure that the HTA is well aware of the work that we're doing. None of this ever happens in isolation. The strength of the global brand and reach into the world is amplified and multiplied through partnership. Every single partner, large and small, enterprise and individual, has a role to play in carrying the Ola Hawaiʻi ethos into the world. He acknowledged the HVCB's partnership with HTJ and Hawaiʻi News, and their partnership with Hawaiʻi Tourism Oceania. He gave kudos to Darren with Sea Cleaners. He mentioned partnering with Colin, Sue, Outrigger, and Cirque du Soleil in December.
Chair Agas said she loved the campaigns. She asked about stakeholders' feedback.

Dr. Salā said they are revamping the whole process for this so that they can start earlier. The marketing advisory committee of HVCB is inclusive of stakeholders from across the ecosystem. They have cultural practitioners, small businesses, large businesses, communities, and hoteliers there. The marketing advisory committee has given its 100% endorsement. Aside from that, they also do some selective engagement. There is some reticence around the messaging because they are soft. They want people to visit and have a good time. The evolution of the brand is something they need to think through because ultimately, sand by itself is not going to sell Hawaiʻi anymore.

Chair Agas agreed with him. It is about telling the story, and they must be 100% behind the messaging.

Member Lazaro said he liked the take on regenerative tourism because many people misinterpreted those words, or they tried to figure out how to make it sound politically correct or correct for them. He liked the slogan, campaign, and the fresh approach.

5. Adjournment

Chair Agas asked if there was further discussion. She asked the committee to adjourn the meeting or go into an executive session. Everyone was happy to adjourn. Chair Agas adjourned the meeting at 4:20 p.m.

Respectfully submitted,

Sheillane Reyes

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Sheillane Reyes
Recorder