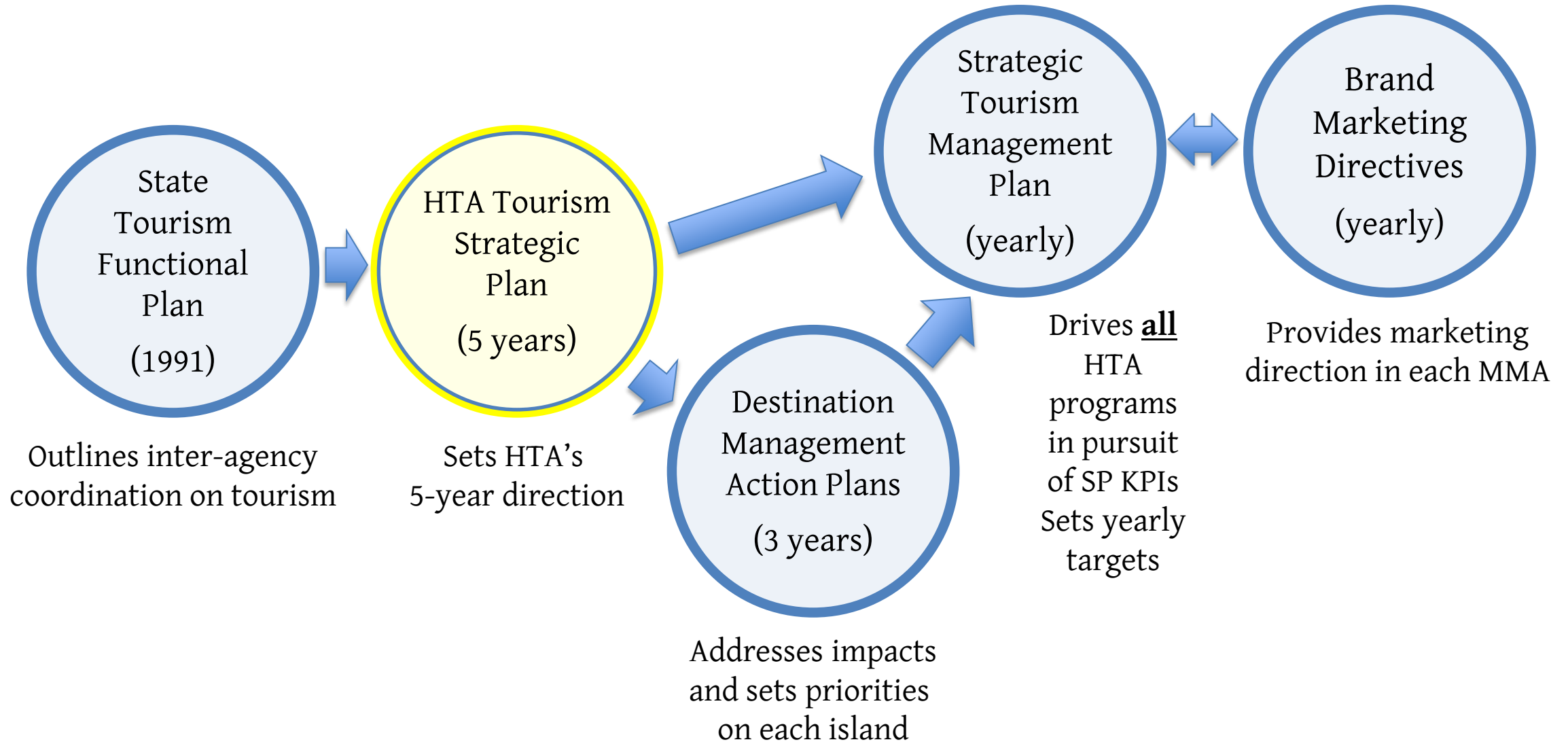


Hawai'i Tourism Authority's Proposed 5-Year Strategic Plan (2026-2030)

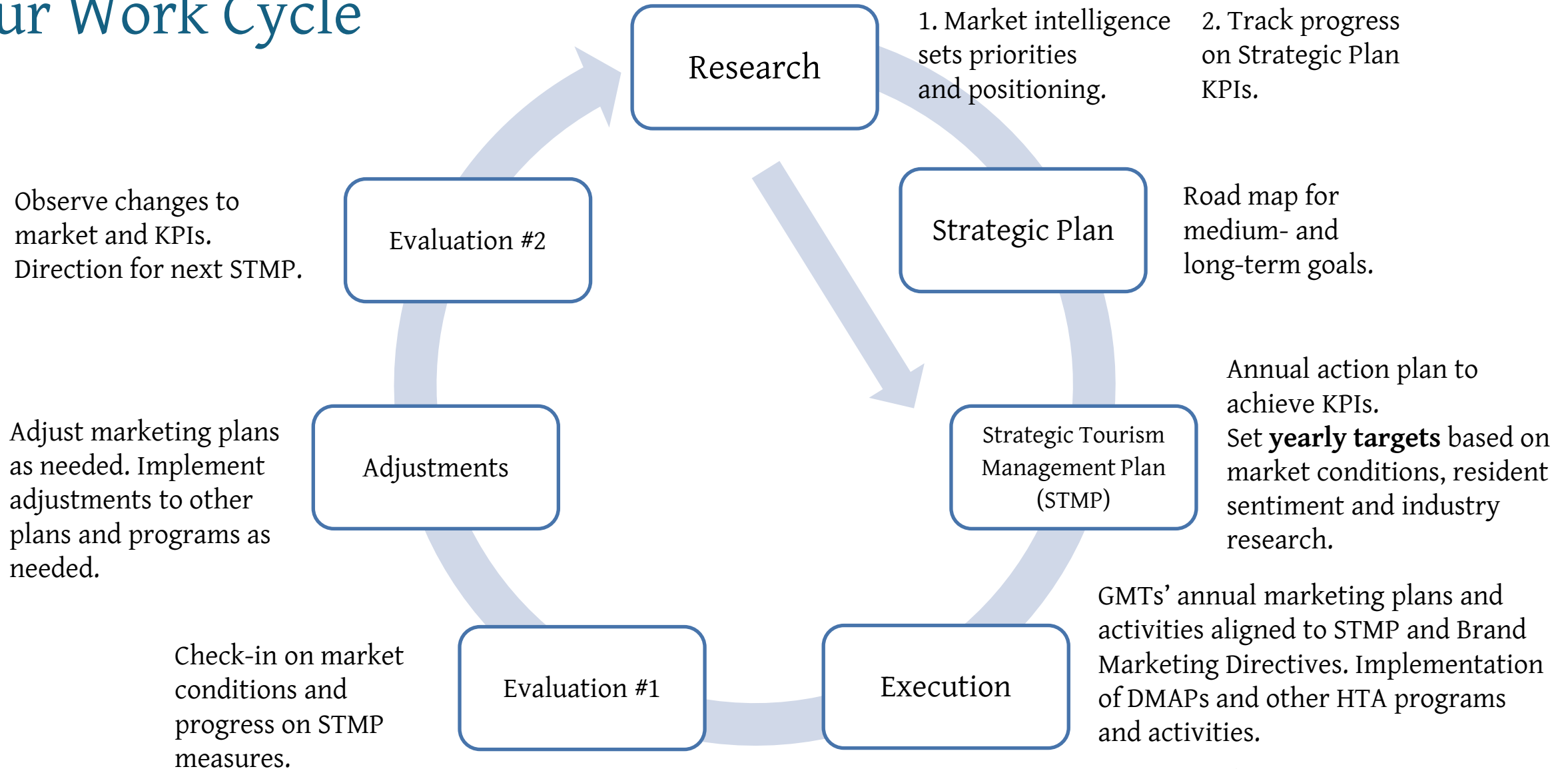
Special Advisory Board Meeting of the Hawai'i Tourism Authority
March 12, 2026



Our Planning Ecosystem



Our Work Cycle



Our Mission

To strategically manage Hawai'i tourism in a sustainable manner consistent with our economic goals, cultural values, preservation of natural resources, community desires and visitor industry needs.



Our Vision for 2030

Hawai‘i thrives through collective actions to grow economic vitality, strengthen collaborations, and fulfill our shared kuleana to build a visitor economy where people, place, and culture prosper together, guided by ho‘okipa, mālama ‘āina, and aloha.



Guiding Principles

Principle	Meaning
Ho‘okipa	To entertain, treat hospitably
Lōkahi	Agreement, unity, harmony or accord
Pūlama i ka ho‘oilina	Lit. “Cherish the Heritage”
Aloha ‘āina	“Love of the land”
Alaka‘i	To lead, guide, or direct
Ho‘oulu	To grow, to inspire
Ho‘okahua	To build a foundation; stability over time
Palekana	Safety
He kulana i mahalo‘ia	A position of admiration or appreciation

Our Proposed Pillars

Brand Marketing

Differentiate Hawai'i through branding that recognizes our unique culture, local values, and drives economic vitality, and respects community needs.

Attract well-defined, high-value visitor segments with targeted marketing strategies that deliver measurable, high returns on investment

Experience Development

With a "community-first" focus, develop sustainable and regenerative visitor experiences that revitalize communities, create economic opportunity, and address interests of high-value visitors

Tourism Leadership

Regain the confidence of the Legislature, Industry and Community.

Lead tourism in partnership with state, county, industry, and community partners to deliver more "net positive" outcomes and build the visitor economy's strength and resilience.

Communicate clearly and collaboratively so that everyone understands their stake in tourism.

Proposed Strategic Pillars and Strategies

Brand Marketing

- Define and target high-value visitors
- Demonstrate high return on investment

Strategies

1. Identify and focus marketing outreach to include more higher-spending, high-value traveler segments.
2. Energize the Hawai'i brand.
3. Strengthen HI competitiveness for MCI travel.
4. Identify optimal distribution of visitation and high-value traveler segments for each island.
5. Educate and engage all visitors to travel responsibly in HI.

Experience Development

- Visitor experiences
- Community benefit and economic opportunity

Strategies

1. Establish an HTA Experience Development Program.
2. Support the enhancement of major attractions and experiences to improve Hawai'i's competitiveness for high-value visitors and major events.
3. Strengthen pathways for local entrepreneurs, creators, and producers to join the tourism economy.
4. Advance understanding and preservation of Hawaiian culture.
5. Data-driven destination management approach.
6. Continue supporting HI's sustainability goals.

Tourism Leadership

- Inter-agency partnership
- Communication and collaboration

Strategies

1. Clarify and strengthen HTA's role as leader of Hawai'i tourism.
2. Formalize interagency partnerships.
3. Strengthen island-based collaboration.
4. Communicate collaboratively and proactively.
5. Support workforce development.
6. Build the long-term resilience of the tourism economy.
7. Strengthen HCC's role as an economic hub.

Proposed Key Performance Indicators (KPIs)

HTA as a whole will monitor five Key Performance Indicators to guide our work:

Strategic Plan 2026-2030 primary KPIs				
Average Daily Visitor Spending	Total Visitor Expenditures	Visitor Satisfaction	Resident Sentiment	Visitor Arrivals

Performance on each pillar is evaluated by KPIs:

Brand Marketing

- Grow **Average Daily Visitor Spending**
- Annual **growth rate of Visitor Spending outpaces growth rate of Visitor Arrivals**.
- **ROAS**
- **Rising intent to travel** in MMAs
- Increase traveler spending and visitation in **shoulder seasons** to generate activity without straining capacity.

Experience Development

- **Visitor satisfaction:** “Exceeds Expectations” for MMAs rises
- **Resident sentiment:** “Tourism has brought more benefits than problems” rises
- Increase traveler spending and visitation in **shoulder seasons** to generate activity without straining capacity.

Tourism Leadership

- **Resident sentiment:**
 - “Tourism is being better managed on my island” rises
 - “HTA actively works to manage tourism in our state through its DMAPs” rises
- **Partner satisfaction** rises via survey
- **Evidence of increased funding**

Tourism Strategic Plans: A Comparison



*2026-2030 cover forthcoming



	Hawai'i Tourism Authority	Travel Oregon	Visit California	Arizona Office of Tourism
Key Performance Indicators	• Visitor Expenditures • Visitor Satisfaction • Resident Sentiment • Per Person Per Day Spend • Visitor Arrivals	• Visitor Spending • Tourism Employment • Tax Revenue	Not listed	Objectives at a strategy level, e.g. "Increase average international spend"
Targets	Set in annual Strategic Tourism Management Plans	Set in biannual action plans	Not listed	Progress listed in annual Strategic Plans

Brand Marketing Strategies (p. 21)



Brand Marketing Pillar

	Strategies
1	Identify and focus marketing outreach to include more higher-spending, high-value traveler segments.
2	Energize the Hawai'i brand.
3	Strengthen HI competitiveness for MCI travel.
4	Identify optimal distribution of visitation and high-value traveler segments for each island.
5	Educate and engage all visitors to travel responsibly in HI.

Key Performance Indicators

1. Average Daily Visitor Spending grows
2. Annual growth rate of visitor spending outpaces growth rate of visitor arrivals
3. Return on advertising spend (ROAS)
4. Rising intent to travel across MMAs
5. Increase traveler spending and visitation in shoulder seasons

Other Measures

1. **International visitation (%)**
2. Above-average spending for targeted segments
3. MCI growth
4. Higher campaign effectiveness compared to other US DMOs
5. Visitor message recall:
 - A. "Safe and responsible travel"
 - B. "Caring for people, environment, and culture"
6. Increase in first time vs. repeat visitors

Success in Brand Marketing is **primarily** measured by:

Key Performance Indicator	Why?
Average Daily Visitor Spending grows	• The High-Value Traveler provides greater economic benefits to the State during their stay.
Annual growth rate of visitor spending outpaces growth rate of visitor arrivals	• Increase the economic value of tourism • Ensure our natural and cultural resources are not strained by visitor growth.
Return on advertising spend (ROAS)	• Use State resources responsibly • Improve campaigns towards effectiveness and efficiency
Rising intent to travel across MMAs	• Assess Hawai'i's competitiveness relative to other destinations • Identify softening markets early and adjust campaigns accordingly • Understand and get ahead of future visitor demand
Increase traveler spending and visitation in shoulder seasons	• Support local businesses that may rely heavily on peak-season revenues • Reducing pressures on natural and cultural resources

Other measures calibrate our Brand Marketing activities

Measure	Why?
International visitation (%)	• Diversify visitor markets to buffer domestic trends
Above-average spending for targeted segments	• Gauge how targeted markets are providing the economic benefits envisioned
MCI growth	• MCI Travelers provide exceptional economic value • Support HI's goals as a place to do business • Build pathways for repeat visitation in future
Higher campaign effectiveness compared to other US DMOs	• Solidify Hawai'i's reputation and expertise in tourism • Justify our responsible use of State resources
Visitor message recall: • "Safe and responsible travel" • "Caring for people, environment, and culture"	• Assess effectiveness of targeting HVTs that share in our culture and work with us in preserving our natural resources
Increase in first time vs. repeat visitors	• Set up first-timers for repeat visitation in the future • Build in cultural and environmental awareness

Experience Development Strategies (p. 26)



Experience Development Pillar

	Strategies
1	Establish an HTA Experience Development Program.
2	Support the enhancement of major attractions and experiences to improve Hawai'i's competitiveness for high-value visitors and major events.
3	Strengthen pathways for local entrepreneurs, creators, and producers to join the tourism economy.
4	Advance understanding and preservation of Hawaiian culture.
5	Data-driven destination management approach.
6	Continue supporting HI's sustainability goals.

Key Performance Indicators

- Visitor Satisfaction grows
- Resident sentiment: "Tourism has brought more benefits than problems" rises
- Increase traveler spending and visitation in shoulder seasons

Other Measures

1. Sports events: visitation increases
2. Business development: number of small and medium enterprises increases
3. Experience of Aloha (from Portrait of the American Traveler study) improves
4. DMAP milestones on time
5. Adoption of HTA sustainability tools and initiatives
6. Resident sentiment increases:
 - A. "Awareness of HTA's DMAPs"
 - B. "Tourism is an industry that enhances residents' quality of life"

Success in Experience Development is **primarily** measured by:

Key Performance Indicator	Why?
Visitor Satisfaction grows	• Sustaining Hawai‘i’s reputation as a premier destination requires consistently high visitor satisfaction. • Product development efforts in this pillar enhance the quality and depth of visitor experiences. • Strong resident support for tourism fosters authentic interactions, a hospitable workforce, and a sense of aloha that elevates the visitor experience.
Resident sentiment: “Tourism has brought more benefits than problems” rises	• Positive resident sentiment is essential to sustaining a healthy, community-supported visitor economy.
Increase traveler spending and visitation in shoulder seasons	• Investments in product development, such as trails and events, generate compelling offerings that naturally attract high-value travelers during off-peak months. • Spreading visitation more evenly throughout the year supports better management of natural and cultural sites, improving the overall visitor experience and reducing strain on sensitive areas.

Other measures calibrate our Experience Development activities

Measure	Why?
Sports events: visitation increases	• Proven, event-driven segment with the interest and capacity to travel • Aligned with larger State and Legislative priorities for sports tourism
Business development: number of small and medium enterprises increases	• Aligned with DBEDT small- and medium-sized enterprise priorities
Experience of Aloha (from Portrait of the American Traveler study) improves	• A significant number of stakeholder informants identified aloha as the defining quality of Hawai'i hospitality • Conversely, HI also observed a downturn in visitors "feeling welcome" according to the Portrait study in recent years
DMAP milestones	• Build Legislative confidence in Destination Management as a key HTA responsibility • Feeling included and heard in tourism planning decisions is the second most important resident sentiment determinant
Adoption of HTA sustainability tools and initiatives	• Aligned with State sustainability goals
Resident sentiment: - "Awareness of HTA's DMAPs" - "Tourism is an industry that enhances residents' quality of life"	• Tied to DMAP milestones measure above • Product development in this pillar improves both visitor and resident experiences/quality of life

Tourism Leadership Strategies (p. 30)



Tourism Leadership Pillar

	Strategies
1	Clarify and strengthen HTA's role as leader of Hawai'i tourism.
2	Formalize interagency partnerships.
3	Strengthen island-based collaboration.
4	Communicate collaboratively and proactively.
5	Support workforce development.
6	Build the long-term resilience of the tourism economy.
7	Strengthen Hawai'i Convention Center's role as an economic hub.

Key Performance Indicators

- Resident sentiment grows:
 - “Tourism is better managed on my island”
 - “Awareness of HTA DMAPs”
- Partner satisfaction
- Evidence of increased funding

Other Measures

1. Visitor Satisfaction
2. Dashboard and GoHawaii app insights
3. DMAP stakeholder satisfaction
4. Stronger community and industry engagement

Success in Tourism Leadership is **primarily** measured by:

Key Performance Indicator	Why?
Resident sentiment grows - “Tourism is better managed on my island” - “Awareness of HTA DMAPs”	• HTA is the primary agency working to better manage tourism on all islands. • The DMAPs is the primary expression of this management work. • Residents on all islands expressed a desire to be better informed about our management work.
Partner satisfaction	• As HTA is a coordinating agency, many of our programs are fulfilled through collaboration with agency and external partners.
Evidence of increased funding	• Activities in the Tourism Leadership pillar are centered on building trust with the Legislature. As our fiscal sponsors, their trust and confidence can be measured through funding each year.

Other measures calibrate our Tourism Leadership activities:

Measure	Why?
Visitor Satisfaction	• Our activities in building trust and confidence should directly contribute to better funding mechanisms, more efficient execution of programs, and ultimately a better visitor experience, inclusive of community stakeholders.
Dashboard and GoHawaii app insights	• These tools serve both as communication and transparency mechanisms. Increasing communication and transparency can be measured through these platforms.
DMAP stakeholder satisfaction	• A more systematic DMAP process this time around should translate into better working relationships and collaboration with DMAP stakeholders (including Advisory Groups and community members) on each island.
Stronger community and industry engagement	• Strengthened public affairs, communication, and transparency capabilities should equate with stronger engagement from both community and industry partners. • Informants for the SP expressed a desire for an increased cadence in communications and convenings with both community and industry partners.