



The Complexity & Importance of In-Destination Experiences for a Tourism Destination

Presented by A3H to the Hawai'i Tourism Authority Board,
December 18, 2025

Date: [Insert]
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Presentation's Outline

- Who is A3H
- What In-Destination Experiences (IDE) provide for the Industry, Community & Economy.
- Current Challenges
- We are seeking direction from the HTA's board and management regarding the best approach to secure Marketing support for the resident-owned Businesses in our Industry sector.

Who A3H Is

A Member-Owned Trade Association Not-For-Profit 501 (c)(6) est.1989



A3H (Activities & Attractions Association of Hawai'i) represents attractions, tours, and activity providers statewide. The modern term “In-Destination Experiences” (IDE).

We work to increase pre-arrival **direct bookings** while improving consumer protection and industry standards. We've been self-supported through membership and Shaka Gold Card Sales for 36 years!

Protection

- Lobby for consumer protection in the sale of Hawaii's IDE.
- Represent member interests to the county, state, and federal governments.
- Share best practices: waivers, contracts, standards (SOPs).

Promoting

- **Collective marketing to drive pre-arrival direct bookings.**
- HawaiiFun.org and partner network sites.
- Member offers via Shaka Gold Card.

Communication

- Private member forum to share issues and solutions.
- Collective problem-solving (operational + policy).
- Coordination with destination partners.

Why focus on direct bookings?

*Because it improves visitor experience and
Best supports value in Hawai'i.*

Visitor Outcomes

- Clear accountability for customer service and safety communications
- Transparent terms, refunds, and real-time availability
- Fewer booking errors and fewer disputes/chargebacks

Community + Business Outcomes

- More revenue retained by resident-owned Hawai'i-based operators
- Better data for destination management and dispersal
- More capacity to invest in training, culture, and stewardship

Our Members

[illegible]

Thousands of Activities. Only One Hawaii.

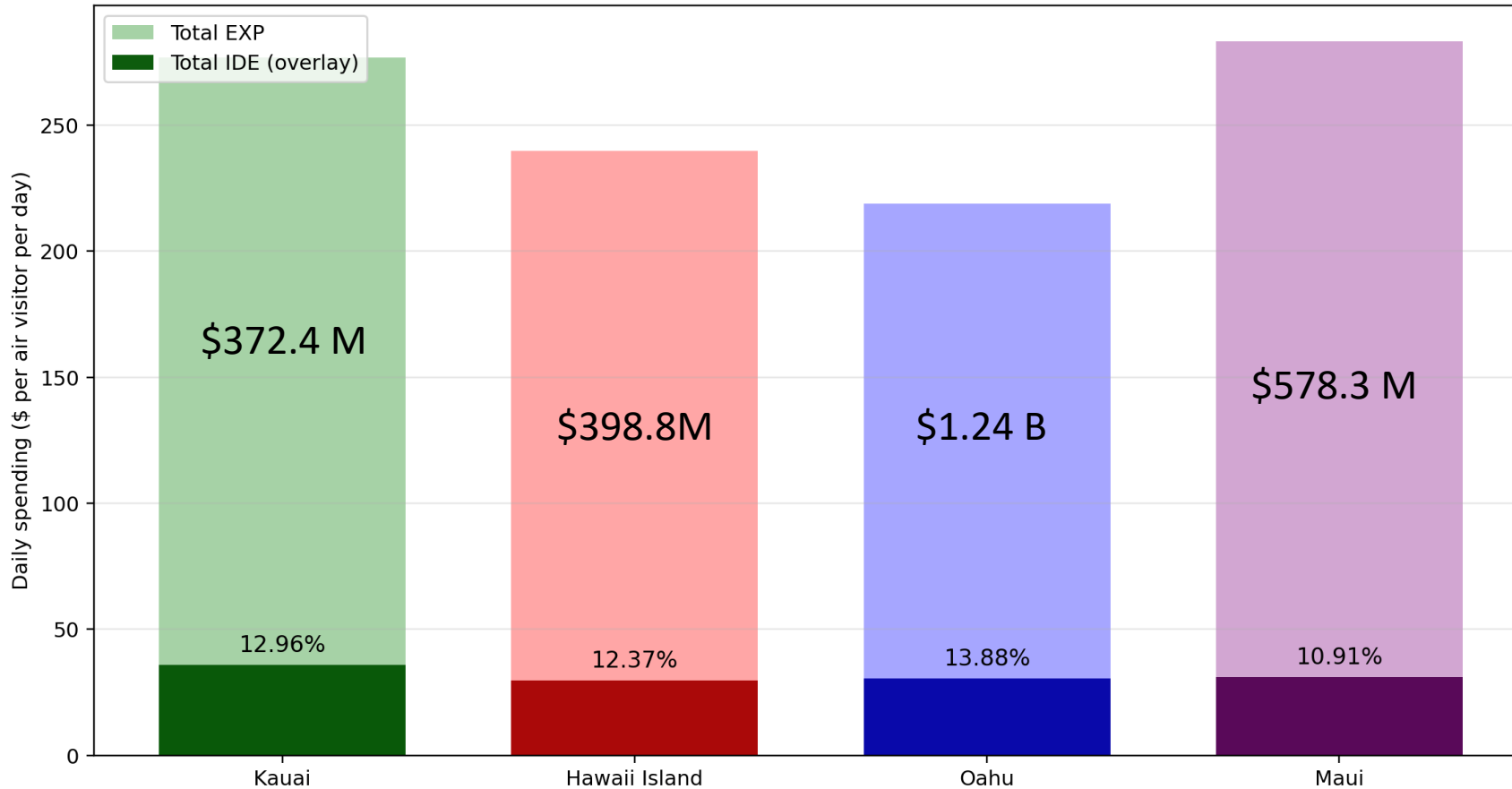
Our profits remain in this economy.

Economic Frame of Reference (2024 Air only) - \$2.59 B IDE

In-Destination Experiences is a Meaningful Share of Daily Visitor Spend*

Air visitor personal daily spending (2024): "Total IDE" by island (US Dollars) - % of total Daily Visitor Spend (Total Annual Visitor Spend \$24.9 B; .5% = \$125M)

2024 Air Visitor Daily Spending by Island: Total EXP vs Total IDE (Overlay)



Implication

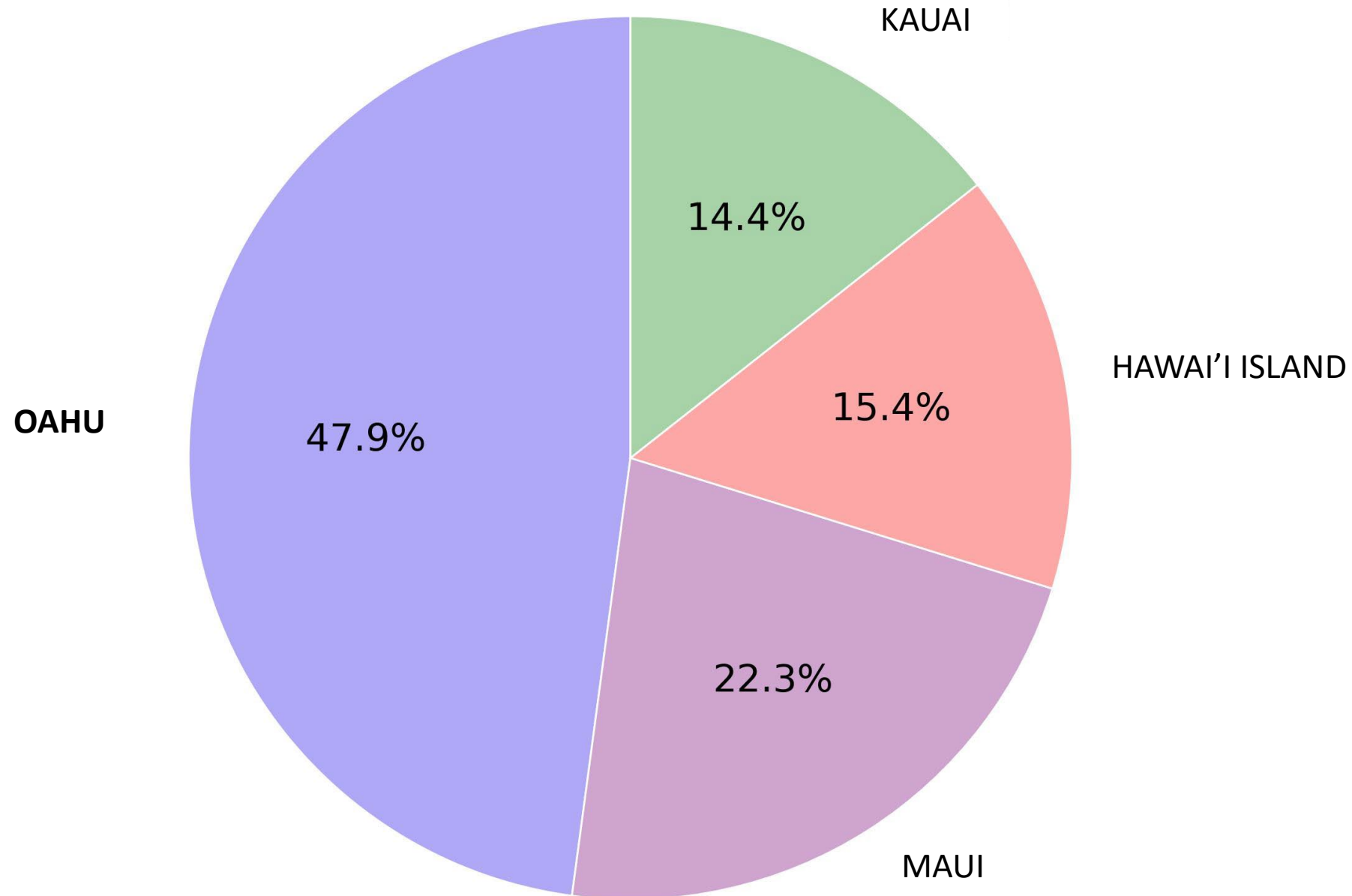
Even small shifts toward direct booking can materially benefit:

- visitor trust
- local business retention
- measurement + stewardship

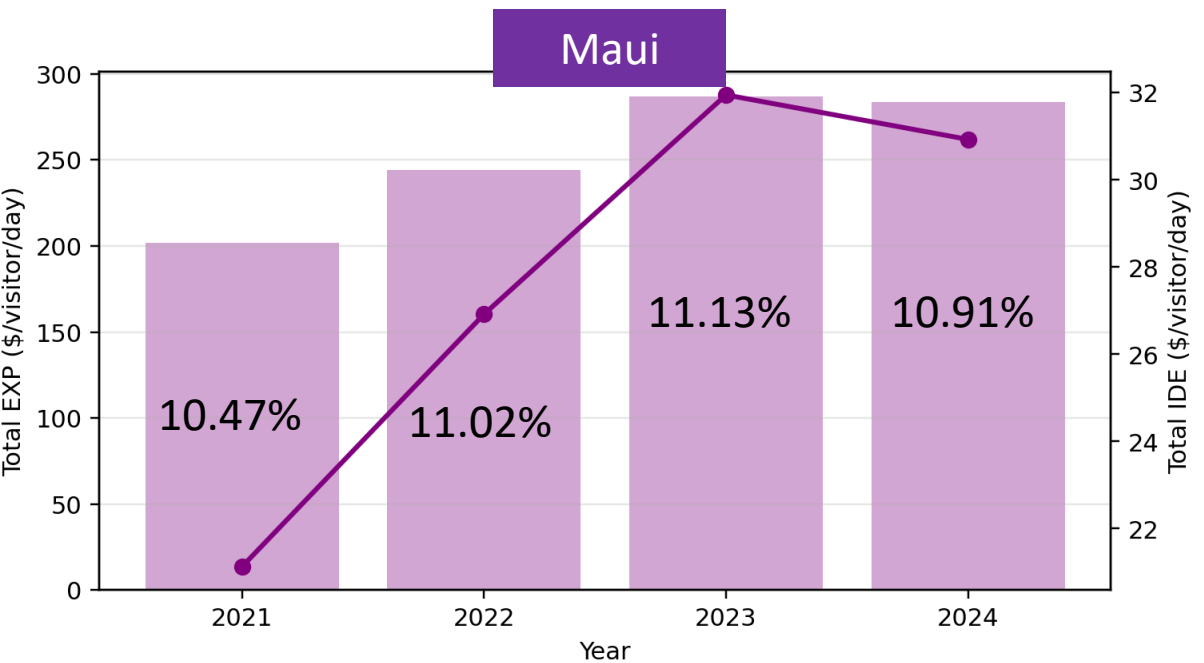
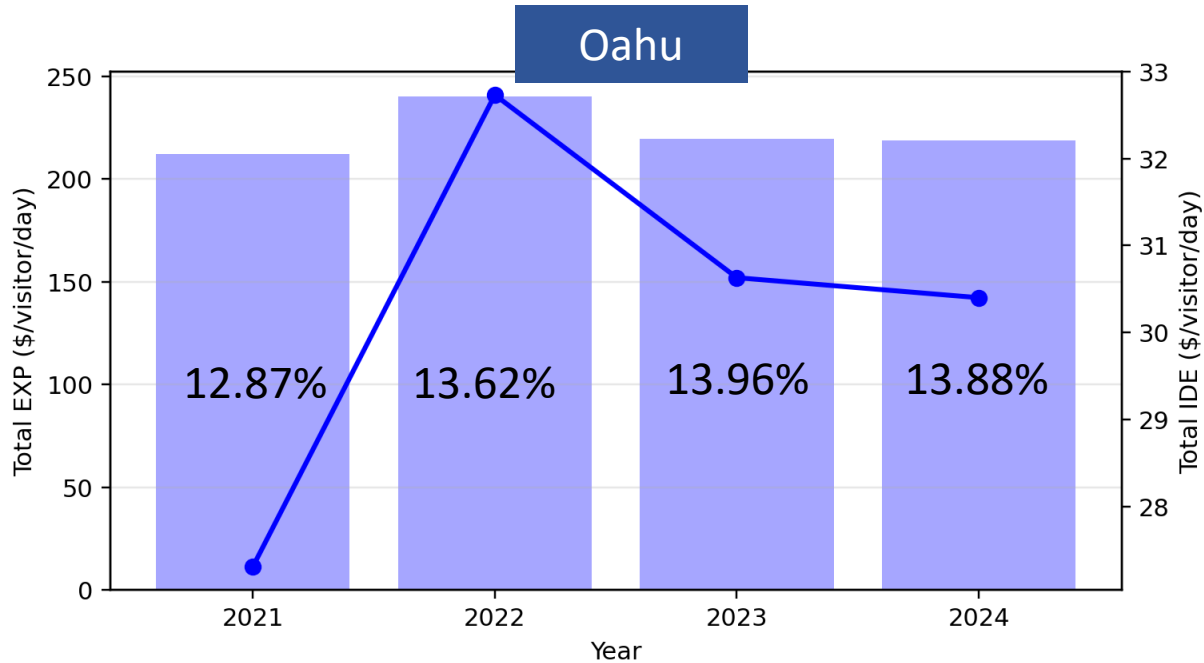
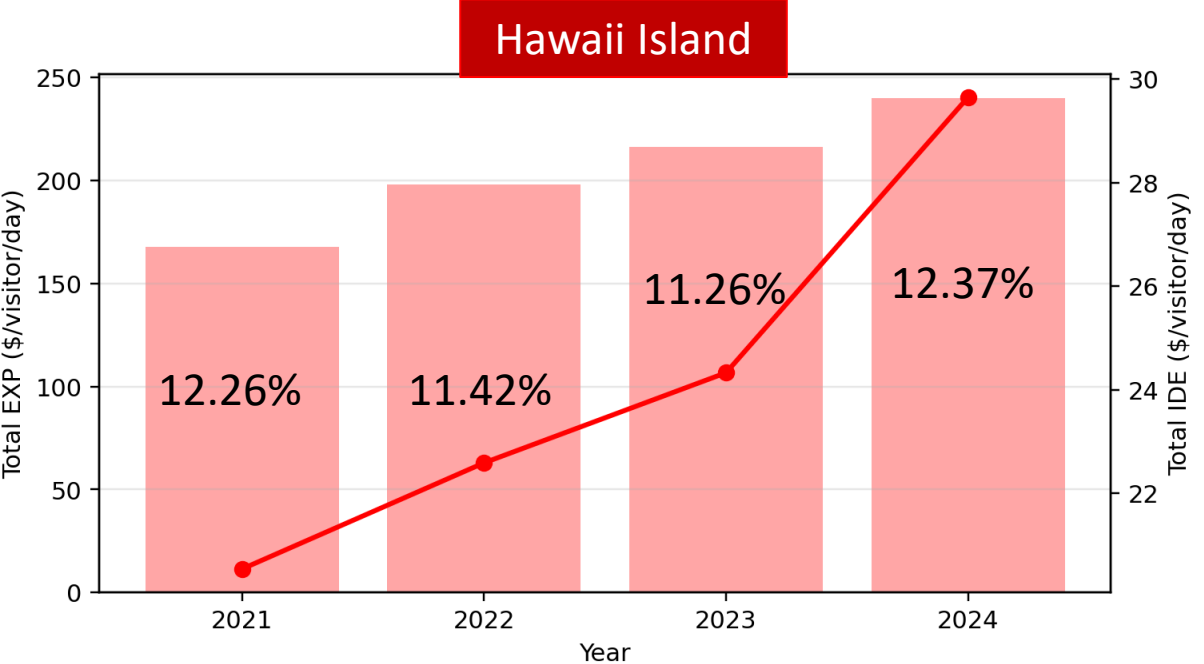
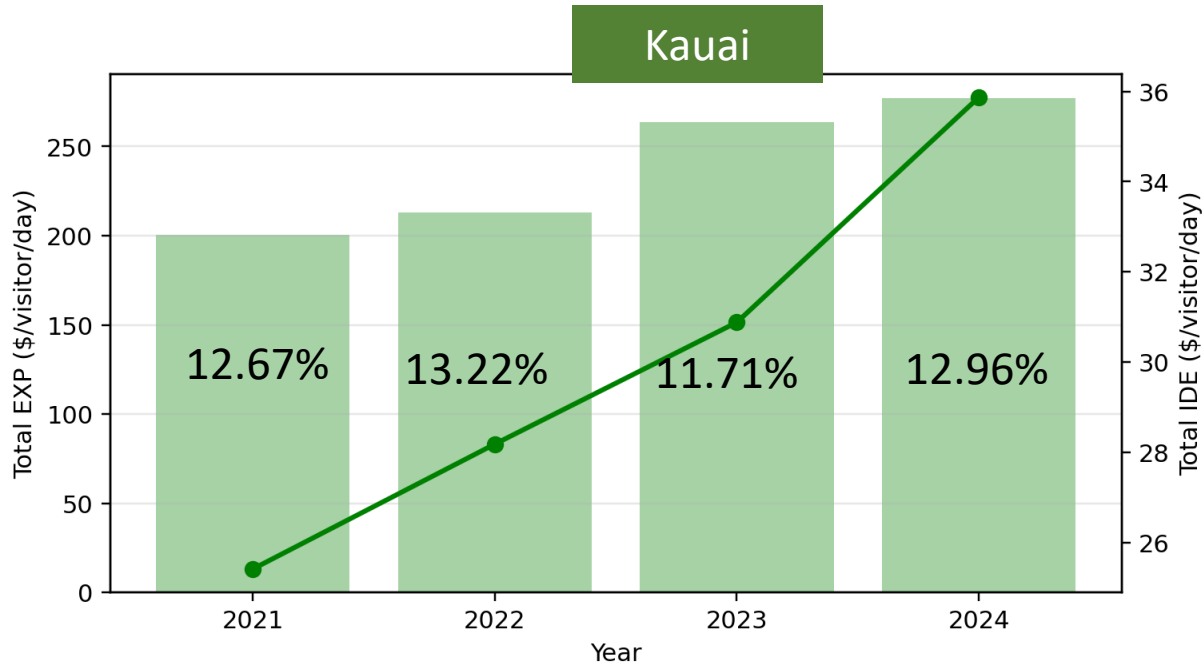
Our goal is to increase the share of these dollars captured directly by verified Hawai'i operators.

*Entertainment & Recreation +Dinner Show & Cruises + Transportation

Air Travel Expenditure Distribution By Island



Air Visitor Daily Spending (2021-2024): Total EXP (bars) vs Total IDE (line)



Current Frictions

Member Pain Points

- Mixed Marketing Messages.
- Lack of skilled labor, which is exacerbated by a lack of affordable housing.
- Price of a Hawai'i vacation is at its highest, while IDE margins are at their lowest.
- Unauthorized resellers and misrepresentation of terms, mismanagement of funds, as the economy slips.
- Illegal operators (lack of enforcement).
- Chargebacks, Fraudsters, and disputes (financial loss + operational burden).
- Limited first-party data to improve visitor experience.

What's getting in the way of direct growth

Visitor Impact

- Potential Guests question whether residents want them to visit or not.*
- Increase in self-guided, Flop & Drop visitors.
- Misaligned expectations and “surprise fees”; Transactional Experience.
- More customer service loops (operator vs reseller vs platform).
- Lower confidence in authenticity and safety communications.

*Especially true on Maui STR Bill 9 and harsh anti-tourism comments by County Government connecting the industry to the Maui wildfires and housing crisis.

Consumer Protection is Destination Stewardship

A3H helps reinforce “trusted sellers” and consistent standards across channels.

Proposed Approach

- Hawaiiifun.org is a “Verified Direct” pathway: visitors click from trusted channels to book directly with vetted operators.
- Establish clear standards: pricing transparency, cancellation terms, and accurate representation.
- Centralize complaint intake and escalation for unauthorized sellers and misrepresentation.
- Align with HTA programs (e.g., certification/quality marks) where appropriate.

HTA Alignment

HTA highlights:

- Destination Management + Visitor Education with a focus on Sustainability
- Official Quality Marks (e.g., Qurator)
- Brand Protection

A3H contribution:

- Supplier Verification + Member Accountability
- Industry Standards and Best Practices
- On-the-Ground Issue Signals and Rapid Mitigation

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SHAKA GOLD CARD LOGIN



HAWAII ISLAND

KAUAI

MAUI

OAHU

SHAKA GOLD CARD

ABOUT US

FIND THE PERFECT ISLAND ACTIVITY

Example: Pearl Harbor Tour

Search



Shaka Gold Card

Book direct & save money

Already a Member?

Sign-In

Hawaii Time: 09:39 AM HST

Hawaii Weather: 77.0 F (25.0 C)



Gathering of the Kings



Experience Maui in Luxury!



Ultimate Whale Watch



Island Breeze Luau

HOME

HOW IT WORKS

DISCOUNTS AVAILABLE

ORDER

ABOUT US

Save \$100s while vacationing in Hawaii with a Shaka Gold Card membership!

Membership starts at \$30 and covers up to 4 people.

Expand the card to cover as many people in your group for only \$7.50 per person.

Order Card

Testimonials

We had a wonderful experience with the A3H Shaka Club Membership. At first I was really skeptical, but everywhere we used it, it worked and we saved a lot of money! We had a family of 9 there and the membership discounts allowed us to do activities that we wouldn't have been able to afford.

Thank you! We plan to go back in about a year and we will renew our membership.

Debbie Ruse
Pleasant Grove, UT

“Book Direct, Experience Hawai'i” — a measured pathway with existing tools

Core Question

What is our best approach to secure & improve Marketing Support for these local Businesses in this sector of Hawaii’s visitor industry?

1) Visitor-facing discovery

- Curated collections (culture, ocean, land, sea, attractions)
- Island-specific itineraries and dispersal prompts
- Clear “book direct with verified operator” messaging

2) Trust + verification

- Verified supplier list (A3H membership + criteria)
- Consistent terms and accurate representation
- Complaint escalation loop for unauthorized sellers

3) Measurement

- Tagged links from each channel
- Conversion reporting SGC
- Insights Tracking & Heat Mapping to improve campaigns and visitor experience



Mahalo

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AUTHORITY

