DRAFT

Hawaiʻi Tourism Authority

Strategic Plan 2026-2030

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This is the Hawai‘i Tourism Authority’s (HTA’s) sixth strategic plan or update, with the most recent previous version approved for 2020-2025.

HRS 201B-7 Tourism-related activities.

(b) The authority shall be responsible for:

(1) Creating a vision and developing a long-range strategic plan for tourism in Hawai‘i;

A FRESH START

Not since the Hawai‘i Tourism Authority (HTA) was formed in 1998 has the arrival of new leadership and a new governance structure coincided with the timing of a new strategic plan. This rare alignment of events creates a fresh opportunity to define our purpose and commitment to ensuring that Hawai‘i’s top economic driver is positioned to thrive and be a benefit to all who care about our islands.

To address past challenges and set a foundation for success, HTA will take decisive steps to enhance operational efficiency and accountability. We will establish clear performance measurements and Key Performance Indicators, establish a robust reporting process, and set defined targets to respond to the 2025 State Audit recommendations. Our commitment to fiscal responsibility will guide all vendor relationships, while we refine our organizational structure to improve productivity and streamline decision-making. Strengthening procurement capabilities will be a priority, including investing time to optimize processes and cross-train staff. Through these actions, HTA will demonstrate transparency, efficiency, and a renewed focus on delivering measurable results.

As we embark on this new five-year plan, both our U.S. and Hawai‘i tourism economies are facing fresh economic worries. CoStar and Tourism Economics recently downgraded their U.S. hotel performance projections for 2025 and 2026, pointing to rising consumer unease about inflation, increasing labor costs and worker shortages, policy uncertainty, and tariff costs.

Here in Hawai‘i, the latest state economic forecast predicted a nearly flat growth rate that likely will be outpaced by inflation through much of this five-year planning cycle. The DBEDT fourth quarter 2025 Statistical and Economic Report noted “sluggish” visitor arrivals in the latter half of 2025, offset by rising visitor revenues from higher-spending visitors. Economic growth was projected to dip slightly in 2026, with a gradual recovery expected to begin in 2027 and growth rising to 1.9% in 2028. Our 2025 resident sentiment survey showed 63% were concerned about our slowing tourism economy. The same survey showed growing resident interest in promoting tourism, with 47% agreeing that "Tax dollars should be spent to encourage tourism in my community,” up from just 42% in 2024.

Because tourism is Hawai‘’s single biggest economic driver, the success of our state economy depends largely on the success of the tourism economy. In late 2024, the DBEDT (Department of Business, Economic Development & Tourism) Research Division reported in its annual *Tourism and Hawai‘i Economy* brief that direct and indirect visitor spending hit $23.9 billion in 2023, with total impacts accounting for 23.5% of Hawai‘’s GDP. The next largest category was real estate and rentals, also heavily influenced by tourism.

The stakes for success are high, not just here but across the nation. Tourism organizations like ours — at state, regional, and city levels — also are strategizing on how to emerge as winners in these challenging times. The competition will be fierce. Though our brand is famous across the globe, Hawai‘i does not “market itself.” A September 2025 UHERO study of tourism industry perspectives, *Tourism in Hawai‘i: Industry Views and Stakeholder Comparisons,* tied long-time underfunding of HTA’s marketing budget to Hawai‘’s declining competitiveness.

These new realities are why this plan points HTA back to the basics. We are sharpening our focus on three strategic pillars to excel as a tourism government organization and provide for the long-term success of Hawai‘i’s visitor industry:

- ***Brand Marketing***: To grow the economic value of Hawai‘i tourism without stressing our islands’ capacity, we will take steps to increase visitor spending at a faster rate than visitor volume. This “Value Over Volume” strategy rests on expanding our definition of a high-value traveler from those who earn more to those who spend more and do more — and inspiring them to visit, especially when we have available capacity. Our goal is not to attract just the most well-off travelers but to seek out those who spend above the average on their travels to pursue a special moment, a passion, or an interest. These may include those who travel for a sport or event, a honeymoon, business, wellness, a tour, luxury, or other interests to be defined through upcoming research. As in the past, we will seek those mindful high-value travelers inclined to share care for our home.

- ***Experience Development***: To ensure that tourism delivers direct economic benefits to more Hawai‘i residents, we will create a new focus on Experience Development. This area of our office will build on current community-based programs to create a comprehensive, community-first approach to connecting visitors with uniquely Hawai‘i experiences, local arts and culture, and “Hawai‘i Made” products — and with the people who produce them. This division also will play an important role in guiding development of “products” for the high-spending travelers we target.

- ***Tourism Leadership***: To deliver on this plan and the many responsibilities entrusted to us, we will take immediate steps to build a strong organization prepared to execute on this strategic plan. But we know it takes many hands to build a healthy statewide tourism economy. We will affirm a spirit of collaboration in working on the challenges facing Hawai‘i. Although we are not authorized to build housing and transit or even regulate vacation rentals, we will support solutions by those who do have that authority through policy and program development. We will tap into the expertise of our visitor industry partners to address big tourism challenges: rebuilding our attraction for key international and domestic markets and enhancing our competitiveness as a business travel destination, especially to re-fill our beautifully reimagined Hawai‘i Convention Center after a two-year renovation. We will also collaborate with state and county partners to build a stronger tourism economy, especially to build and retain key air routes.

Each of these three strategic pillars represents an aspect of Destination Management, as defined in our governing statute, HRS 201B. Each also holds potential for the holistic practices of Destination Stewardship and fostering regenerative tourism. Our overall aim with this plan is to build a more successful, more competitive tourism economy for Hawaiʻi in harmony with the priorities of our residents, businesses, and visitors.

We also recognize that building Hawaiʻ'ʼs competitive position for travelers will require our state to make a greater investment in lifting the tourism economy. Our intention with this plan is to make that case.

GUIDING PRINCIPLES

This plan expresses our commitment to leading the state tourism economy in the ways that reflect the desires of Hawaiʻi residents while also addressing the need for a strong and resilient visitor industry. The strategies described in these pages advance responsible travel, fostering the right relationships between people, place, and prosperity. Our plan makes it clear we invite visitors to share aloha, engage with respect for all we value, and contribute to the well-being of our islands. We firmly believe that the fundamental strength of Hawaiʻi as a visitor destination is aloha, which is preserved and made manifest by its people. HTA's first strategic plan, Ke Kumu, identified nine principles based on Hawaiian values to guide the Authority's work and achieve its goals. More than twenty-five years later, these principles will continue to shape our efforts to meet intended outcomes.

- **Hoʻokipa** (To entertain, treat hospitably; hospitable; hospitality) – To properly host visitors, whether invited or unexpected, is an important value in Hawaiian culture. Hawaiians of the past took great pride in hosting or entertaining visitors. We reaffirm our pride in hosting visitors from around the world with a quality visitor experience.

- **Lōkahi** (Agreement, unity, harmony or accord) – The figurative translation refers to a group working together toward a common goal, with that common goal having a positive benefit for all. Likewise, the HTA values local community involvement in defining and planning a successful tourism industry so that it supports the quality of life for Hawaiʻi's residents.

- **Pūlama i ka hoʻoilina** ("Cherish the Heritage") – Hoʻoilina means legacy and pūlama means care, cherish, or treasure. For HTA, this phrase refers to caring for the legacy that will be handed down to future generations and supporting the preservation of Hawaiʻi's unique cultural heritage which has shaped Hawaiʻi's history and identity.

- **Aloha ʻaina** ("Love of the Land") – In caring for the land and ocean, the Hawaiians of old viewed themselves as stewards of the land and ocean, which sustained all life. Therefore, HTA recognizes the importance of preserving Hawaiʻi's fragile natural environment and natural resources to sustain future generations of residents and visitors.

- **Alakaʻi** (To lead, guide or direct and/or refers to a leader, guide, or conductor) – The HTA recognizes Hawaiʻi's potential to be the premier training and educational center for the tourism community and for students in Hawaiʻi and around the world.

- **Hoʻoulu** (To grow, to inspire) – The HTA desires to be a building block for growth and diversification of local products as an export into the worldwide distribution system.

- **Hoʻokahua** (To build a foundation; also infers developing long stability over the long haul) – The HTA will strive to build a foundation that encourages and supports product growth, diversification and a diversified visitor mix. This foundation will (a) support a broader range of products and services within the local business community; and (b) serve the long-term business and economic cycles impacting the health and welfare of Hawaiʻi's residents.

- **Palekana** (Safety) – A core value of HTA is to maintain a safe and secure environment for all residents and visitors.

- **He kulana i mahaloʻia** (A position of admiration or appreciation) – The HTA shall strive to earn the respect of the people by its contribution to the state and the community.

HTA Annual Work Cycle

The HTA has a dynamic work cycle that begins with the gathering research and market intelligence. This information helps shape HTA's direction within each of the major market areas (MMA) while balancing the need to optimize the industry's contributions to Hawai‘i's communities. In addition, review of program evaluation measures and reports assist in the development of its visitor experiences, destination management, and workforce programs.

Research. Research provides the foundation for HTA to formulate its plans for the sustainability of Hawai‘i's tourism industry. The HTA utilizes market intelligence along with historical and current visitor data, taking into account changes in seasonal trends, demographics, and economic conditions.

HTA Strategic Plan. The HTA Strategic Plan serves as a road map to address short- and long-term goals to achieve Key Performance Indicators. These goals are based on research data, market intelligence, input from industry and community meetings, and collaboration with industry and community.

Strategic Tourism Management Plan. The Strategic Tourism Management Plan (STMP) is the HTA annual action/tactical plan and details initiatives and programs to achieve KPIs. The budget is formulated in conjunction with the STMP, and targets are established as a means to measure the success of attaining HTASP goals.

Execution. The HTA's global marketing team develops their annual marketing plans, based on HTA directives for the MMA and their respective market's current trends and conditions. The HTA also ensures that its destination management action plans are also implemented effectively. Additionally, procurements and programs are also executed per the STMP.

Evaluation #1. To optimize performance outcomes, HTA reassesses its KPIs by monitoring research data and drawing from market intelligence. There is a semi-annual review of its global marketing contractor initiatives. HTA also reviews its other visitor experiences and destination management programs to determine whether benchmarks are being met.

Adjustments. The first evaluation provides an opportunity for HTA and its marketing contractors to regroup and review current market trends and economic conditions, and make necessary adjustments to its marketing plans to achieve its objectives. HTA also collaborates with its other program contractors and partners to make adjustments to its plans and programs as needed.

Evaluation #2. At the end of the year, the HTA will evaluate the effectiveness of its initiatives by analyzing market research and intelligence alongside program results. This evaluation informs decisions on initiatives to refine, retool, and implement in the following year's STMP.

KEY CONCEPTS

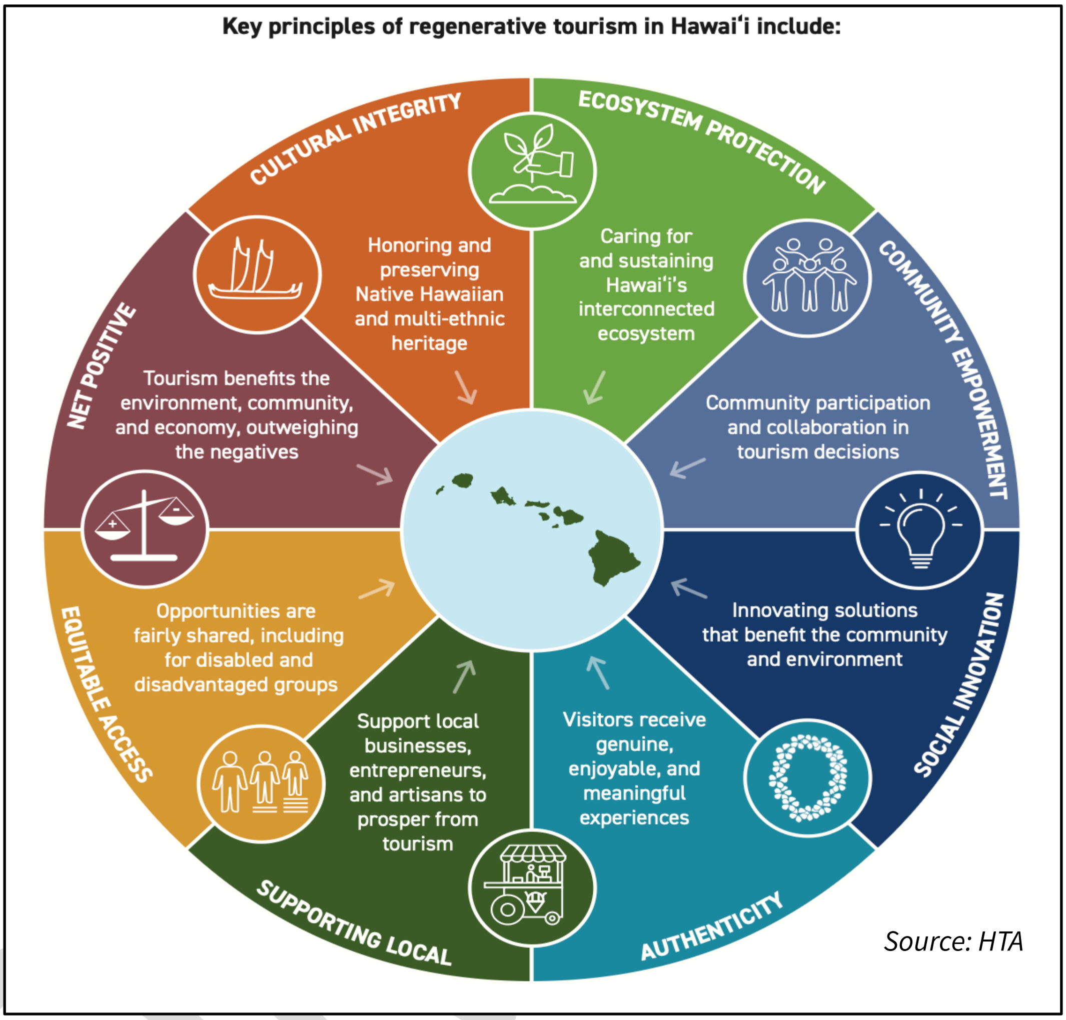
- **DESTINATION MANAGEMENT.** HTA defines this term in keeping with our governing statute, HRS Chapter 201B -1. Destination management means a collaborative and coordinated process with public, private, and community stakeholders to manage the various elements of a visitor destination to:
  1) Create, implement, and monitor strategies that attract targeted visitor markets and improve visitor experiences;
  2) Improve natural and cultural resources valued by Hawaiʻi residents and visitors;
  3) Develop and maintain tourism-related infrastructure to prevent overcrowding and overtaxing sites and resources; and
  4) Ensure that the provision of services enhances the visitor experience.

- **DESTINATION STEWARDSHIP.** Destination stewardship in Hawaiʻi emphasizes a regenerative tourism approach, ensuring the islands' stunning natural beauty, rich cultural heritage, and vibrant communities thrive for generations to come. By balancing the needs of residents, visitors, and businesses, we create a flourishing economic future. Key to this is **destination management**, which focuses on elevating visitor experiences and generating revenue while safeguarding Hawaiʻi's unique identity. Collaboration among all levels of government, industry stakeholders, and the community is essential for both stewardship and management.

- **EXPERIENCE DEVELOPMENT.** The process of improving a tourism destination's physical, social, cultural, and economic attributes to attract and retain targeted visitors who contribute to the destination's well-being while creating experiences for residents to enjoy as well.

- **REGENERATIVE TOURISM.** HTA defines regenerative tourism as a tourism model that:
  1) Is designed and carefully managed to bring net benefits to local communities and destinations; and
  2) Implements an innovative and sustainable economic development plan to:
     (A) Make net positive contributions;
     (B) Create conditions that allow communities to flourish;
     (C) Engage in collaborative efforts that provide visitors with genuine and meaningful experiences in Hawaiʻi; and

(D) Improve destinations for current and future generations for the well-being of the environment, residents, and indigenous communities.”



Other Important Concepts for This Plan

- **HIGH-VALUE TRAVELERS.** This term is used to describe traveler segments targeted by our marketing or sales tactics. Typically, these are travelers who are likely to spend more per trip. These may include international, MCI, luxury, wedding, sports/events travelers, and other categories. By targeting these travelers, we can generate greater economic impact (*value*) without large increases in visitor numbers (*volume*). A high value also can be placed on visitors who show desirable behaviors, such as mindfulness or a willingness to visit multiple islands. (Many Hawaiʻi visitors may not fit these definitions because not all who visit are targeted by our marketing.)

- **KEY PERFORMANCE INDICATORS (KPIs)**. Measurements established to track performance of a strategy or plan. This Strategic Plan identifies an Objective for each of the three core responsibilities that includes at least one KPI. Additional performance measures are embedded in the plan’s Strategies and Tactics.

OUR MISSION

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

OUR VISION

Hawaiʻi 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 hoʻokipa, mālama ʻāina, and aloha.

HOW THIS PLAN WAS CREATED

This section will include a graphic of "input by the numbers."

The 2026-2030 Strategic Plan is the first to be created in parallel with six new island-based Destination Management Plans (DMAPs).

Building on months of outreach and evaluation of past plans, HTA convened and facilitated **more than 30 input sessions** with industry and community participants on the islands of Hawaiʻi, Kauaʻi, Lānaʻi, Maui, Molokaʻi, and Oʻahu from August to November 2025. These virtual and in-person input sessions prompted participants to share their hopes for Hawaiʻi tourism in the next five years and reflect on paths for improvement. HTA also fielded **two statewide surveys**, one for community members and another for industry stakeholders. The findings of these surveys are available in Appendix B.

Other strategic plan findings and initiatives stemmed from data-driven research, our strategic planning team's extensive destination experience, and **more than 50 confidential interviews** with a wide range of stakeholders recommended by HTA. These included **Lieutenant Governor Sylvia Luke** and **Governor's Chief of Staff Brooke Wilson** as well as **Senate President Ron Kouchi** and **House Speaker Nadine Nakamura.** Other legislators — along with state agency directors, HTA Advisory Board Members, past HTA Board members, visitor industry leaders, county economic development officials, academics, and HTA vendors — also shared insights in confidential interviews. (*See Acknowledgements for full list of interviewees.)*

Facilitated input sessions were held with HTA staff and our long-time marketing partner, the Hawaiʻi Visitors and Convention Bureau (HVCB). Findings were incorporated into an extensive **Situation Analysis**. *(See Appendix A.)*

Lastly, this plan includes a section on **Legal and Statutory Framework for Each Strategic Pillar** . This section aligns HTA's mandates with the strategic pillars. *(See page 39.)*

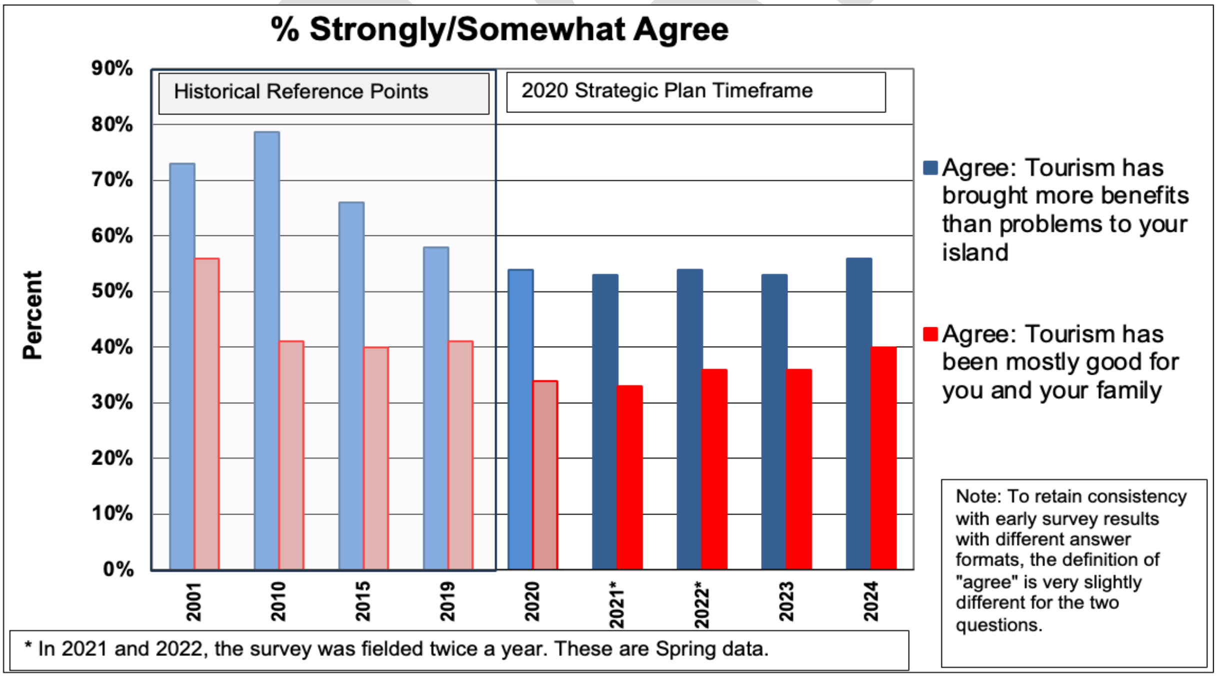
HOW WE WILL MEASURE SUCCESS

This strategic plan includes many detailed measures of success to track performance. Among these are five primary KPIs tied to statistics compiled periodically by DBEDT: Average Daily Visitor Spending, Resident Sentiment, Visitor Satisfaction, Visitor Spending, and Visitor Arrivals. Other success indicators are to be drawn from other reliable sources tracked by HTA or new systems to be developed during this planning cycle.

This plan relies most heavily on Resident Sentiment and Visitor Satisfaction because residents and visitors are among HTA's most important constituents. Context for these important metrics is provided below.

Hawaiʻi Residents More Positive About Tourism

Hawaiʻi resident sentiment toward tourism grew more positive in 2025, with 58% saying tourism has brought more benefits than problems, up from 56% in 2024 and finally regaining pre-pandemic levels. The same survey showed considerably more residents — 55%, up from 47% in 2024 — were seeing more attention to balancing the economic benefits of tourism with resident quality of life.

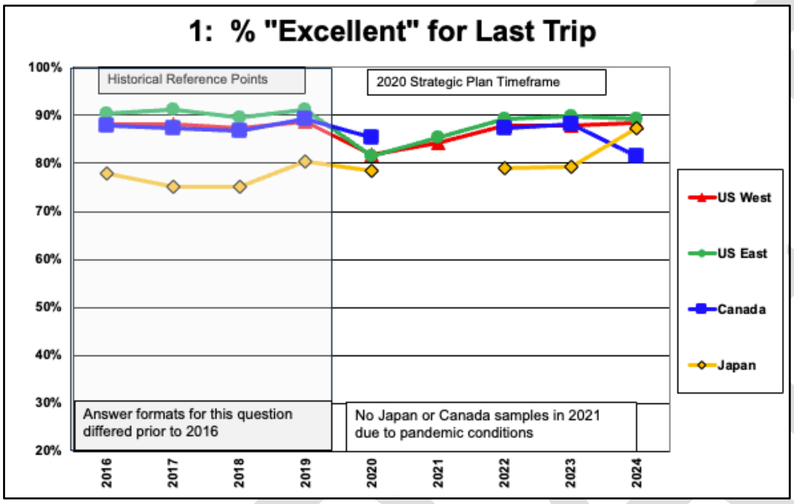


Resident Satisfaction 2001 - 2024 Source: Resident Sentiment Study

While the latest positivity rating remains well below the 80% recorded in 2010, when tourism pulled the state's economy from the Great Recession, Hawaiʻi's current resident sentiment ranks among the most positive of about 70 "mature destinations" tracked by Oregon State University's Sustainable Tourism Lab.

The Lab has followed attitudes about the relative benefits and costs of tourism over the past several years from about 370 global destinations, including several in the Pacific. Hawai‘i's latest results were more positive than nearly 75% of "mature destinations," defined as places where growing tourism impacts have triggered community pushback and constraints, such as funding cutbacks or tax increases.

Most Hawai‘i Visitors "Extremely Satisfied"

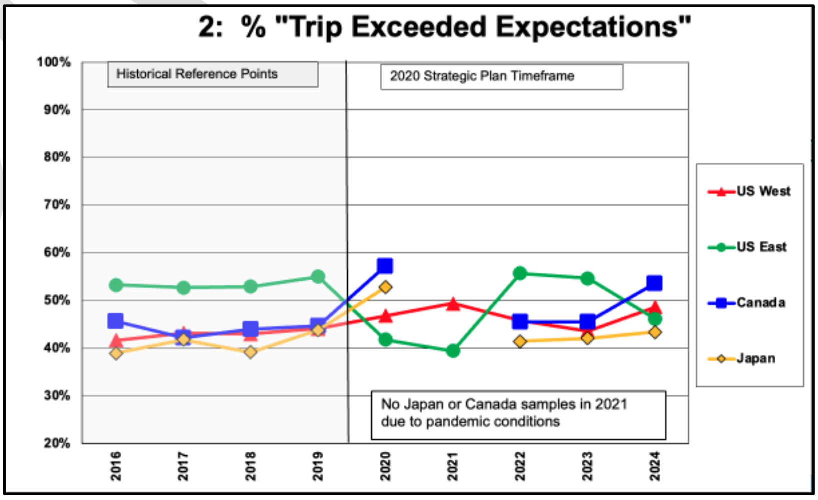


Source: Visitor Satisfaction Survey

Extremely high percentages of Hawai‘i visitors from the four Major Market Areas (MMAs) rate their most recent trips as "Excellent." Allowing satisfaction to dip, however, holds serious consequences for any destination.

High satisfaction ratings matter because extremely satisfied visitors are far more likely to return and to refer a Hawai‘i vacation to others. Personal referrals historically are the most powerful and cost-effective form of marketing.

Hawai‘i visitors also are highly likely to say their trip "exceeded expectations." Researchers see this factor as among the highest predictors of a return visit.



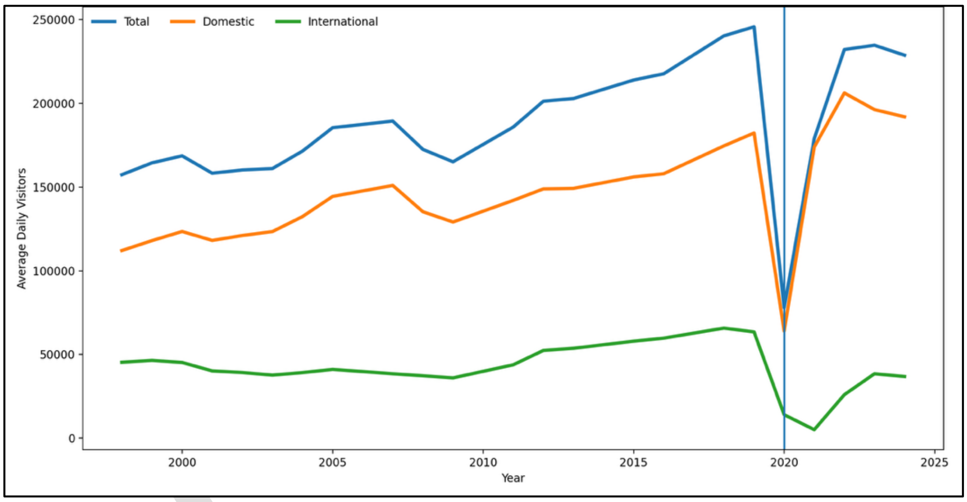
Source: Visitor Satisfaction Survey

Most likely to return, based on 2025 results, are travelers from Hawai‘i's biggest source market, the U.S. West, with 81.3% "very likely" to revisit within the next five years. Those less likely to return typically cited the high cost of a Hawai‘i trip, an interest in visiting other places, or the long distance to visit Hawai‘i.

The State of Hawaiʻi Tourism

KEY INSIGHTS

Important considerations for HTA's 2026-2030 Strategic Plan arose from extensive desktop research, industry and community input sessions, survey results, and confidential interviews with more than 50 key stakeholders. Significant findings are shared below.



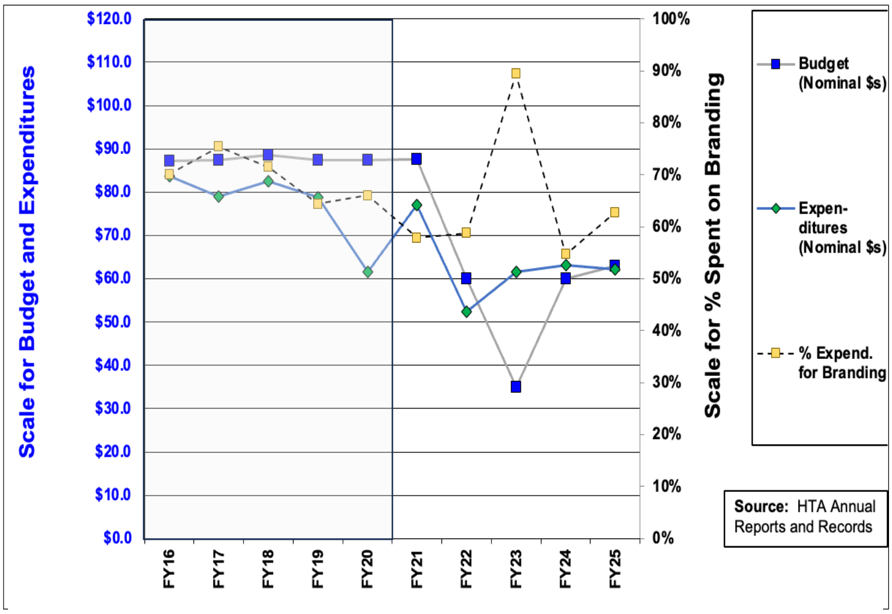
Average Daily Visitor Census: 1998-2024, Source: DBEDT

- **Although Hawaiʻi's overall visitation remains short of the record 10.2 million who arrived by air in 2019, domestic visitation surged past 2019 levels in 2022 and was up by 8.9% over 2019 in 2024.** However, DBEDT Visitor Statistics show visits from one of Hawaiʻi's most valuable segments — international travelers — remained 45.2% below 2019 levels in 2024. DBEDT's recent quarterly economic forecast projected that visitor arrivals will crest 10 million in 2028 for the first time since 2019. This signals an imperative to ensure that growing visitation is managed in keeping with local priorities.

- **Expectations for full recovery of U.S. MICE (Meetings, Incentives, Conferences, Exhibitions) tourism during 2025 have faded**, based on uncertainty about tariffs and rising costs. In early October 2025, a U.S. Travel Association forecast projected just 1.4% growth in domestic business travel during 2025, with inflation-adjusted spending at 88% of 2019 levels. Even lower projections were shared for group business travel, with spending at just 85% of 2019 levels in 2025, rising to 94% by 2029. Transient business travel was seen as recovering faster, but U.S. Travel foresees an even slower recovery for international group business travel, with spending projected at just 70% of 2019 levels in 2025 and rising to 84% by 2029. This less optimistic outlook may require the reimagined Hawaiʻi Convention Center to market more aggressively to fill expanded meeting and event spaces when it reopens in 2028 following two years of renovation.

- **HTA's statewide industry survey and interviews with industry leaders identified deep concerns about Hawaiʻi's declining competitiveness, especially for leisure travelers. HTA anticipates declining competitiveness. These findings were corroborated by a September 2025 UHERO study of tourism industry perspectives, tying the loss of competitiveness in part to long-time underfunding of HTA's**

marketing budget. The report noted that HTA's 2025 U.S. marketing contract totaled $14.4 million, far below top competitor Mexico's $50 million U.S. marketing budget. Two other major competitors — Florida and California — both have far larger U.S. marketing budgets than Hawaiʻi as well. An April 2025 report by HTA research vendor SMARInsights demonstrated how a $3 million cutback in HTA's 2024 media buy for U.S. markets cost the state more than $1.2 billion in spending by "ad-aware" visitors. (See details in "Why Marketing Matters," page 34).



Change in HTA Budget, Expenditures, Brand Spending, FY2016-FY2025

- **Many industry leaders call for raising resident awareness of the economic impact of tourism.** However, the Resident Sentiment Survey shows residents are well aware that tourism generates jobs and earnings for business, with the spring 2025 resident survey showing 80% of residents agreeing that tourism "creates job opportunities for residents." What seems much less understood is the importance of marketing to attract targeted travelers, stimulate demand in slow periods, drive recovery, and overcome competition. A persistent belief that "Hawaiʻi markets itself" is often cited to explain or justify the state's reluctance to fund marketing.

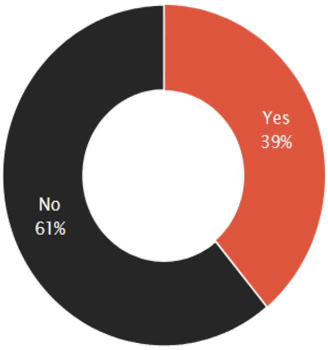
- **A wide range of stakeholders supports targeting a higher-spending visitor to generate economic growth with limited growth in overall visitation.** Industry, community, and government leaders alike see value in controlling growth while increasing economic impact from visitor segments with above-average expenditures. This approach also recognizes the reality that Hawaiʻi costs more than many other island destinations. Industry leaders caution, however, that targeting higher-spending visitors will require investment in outdated infrastructure so that the quality of the visitor experience matches expectations for a high-end destination.

- **There is a growing understanding that some resident dissatisfaction stems from a lack of transparency around how tourism tax revenues are spent.** The Resident Sentiment Study shows many residents perceive little direct benefit from tourism in their daily lives, even though visitor spending — from the Transient Accommodations Tax (TAT)and the state's General Excise Tax — funds a substantial portion of state and county budgets. Transparent allocations of Hawaiʻi's new "Green Fee" will provide both an opportunity to highlight the value of tourism for residents and to thank visitors for the tangible improvements their dollars are funding.

- **Concerns are growing that the health of Hawai‘i's visitor economy has been impacted by a loss of *aloha*.** Recent data from MMGY's Portrait of the American Traveler survey in summer 2025 shows an uptick — from 11% in 2024 to 13% in 2025 — among those who say, "I have heard/read that people in Hawai‘i are opposed to visitors coming." It will be important to assess the depth and root causes of this growing risk and, if warranted, develop a strategy for turning around negative perceptions of Hawai‘i travel before they become even more widespread and difficult to reverse.

The cost to visit Hawai’i continues to be the most cited deterrent to visiting.

Considered Visiting Hawai’i But Changed Their Mind



Reasons For Not Visiting Hawai’i – Among Air Travelers Who Changed Their Mind	2023	2024	2025
Price of the airfare	40%	37%	39%
Price of the vacation package	32%	30%	32%
Price of the hotel	32%	30%	31%
Better value at another destination	22%	27%	26%
The flight to Hawai'i is too long	23%	24%	23%
Been to Hawai'i before, I wish to try another destination	12%	13%	17%
I don't have enough time to travel to Hawai'i	18%	10%	14%
Hawai'i is too crowded	13%	8%	14%
I have heard/read that Hawai'i residents are opposed to visitors coming	NA	11%	13%
Hurricanes and tropical storms hitting Hawai'i	9%	8%	11%
Not sure which island(s) in Hawai'i to visit	9%	9%	10%
I can find higher quality entertainment at other destinations	NA	8%	10%
Accommodations were not available	9%	7%	10%
Have heard rental cars are limited or not available	NA	7%	10%
Hawai'i is not unique and different enough from other destinations	7%	6%	9%
Not enough activities in Hawai'i that interest me	NA	4%	7%
Hawai'i is not exotic enough	6%	5%	5%
Not enough dining option at a price point I can afford	NA	7%	4%
I do not feel comfortable visiting Hawai'i at this time due to the fires on Maui	NA	4%	3%

Hawai’i Tourism Proprietary Questions

12 Base: Air Travelers (n=2,111) & Air Travelers Who Changed Their Mind (n=717)
Source: MMGY’s 2025 *Portrait of American Travelers®* “Summer Edition”

MMGY Travel Intelligence

- **Hawai‘i began fostering community-rooted regenerative practices long before the term became popularized, but the concept is still widely misunderstood.** While HTA and other Hawai‘i organizations have embraced regenerative tourism as a policy model bringing net benefits to local communities, recent research shows that businesses see it as more of an "add-on" than a new way of doing business. Adoption also has been limited by a lack of understanding, Many Hawai‘i stakeholders mistakenly believe regenerative tourism centers on voluntourism. A deeper cross-sector collaboration is needed to achieve alignment on the value of a regenerative tourism ecosystem for Hawai‘i.

- **Many, including lawmakers, see opportunity in creating a more circular tourism economy that keeps more dollars in Hawai‘i and in the pockets of residents.** Many residents see or experience little benefit from tourism in their daily lives, even though tourism revenues from TAT and the state's General Excise Tax fund approximately 13% of the state's budget and a considerable portion of most county budgets. Additionally, many residents believe tourism proceeds and profits go mainly to offshore companies rather than staying in Hawaiʻi.

Risks and Opportunities

KEY INSIGHTS

Significant attention was devoted throughout the planning process to identifying risks and opportunities for Hawai‘i tourism. This included a detailed PESTLE Analysis, using a well-established framework to systematically review the Political, Economic, Social, Technological, Legal and Environmental forces shaping the global tourism landscape. (See Appendix A). By assessing 20 global macrotrends through these six lenses, the analysis identifies significant external factors beyond Hawai‘i's immediate control that can determine both opportunities or challenges for the years ahead. This structure ensures the strategy remains grounded in realistic, forward-looking conditions.

To gain Hawai‘i perspectives, various groups of stakeholders, including HTA staff and Advisory Board members, were asked to rate a list of global tourism trends as either risks or opportunities for Hawai‘i tourism. Results from all groups were highly similar, indicating strong alignment across a wide range of stakeholders. Below are results from a similar question included in the HTA Community Survey fielded by PPRC in August 2025.

Q: Below are some global tourism trends. For each one, do you think it is mostly an opportunity or a risk for tourism on your island?

Source: PPRC/HTA Community Survey, Aug 2025

A top risk: Hawaiʻi's lodging tax among the nation's highest
Hawaiʻi's lodging tax was among the highest in the U.S. in 2025, with its overall tax rate of 17.96% ranking fifth among the nation's 25 most-visited destinations and well above their average rate of 16.11%. With Hawaiʻi's "Green Fee" taking effect Jan. 1, 2026, the state's lodging tax climbed another 0.75% to 18.71%.

The comparisons come from the 2025 Lodging Levies & Rates study by the U.S. Travel Association and Civitas, which creates innovative funding solutions for destination organizations globally.

The study also showed that Honolulu's lodging tax rate — which is standard across Hawaiʻi — ranked just 15th among the 20 U.S. destinations with the highest lodging tax rates in 2025. Among these destinations, rates ranged up to 19.98%, compared with an average lodging tax rate of 15.5% for all destinations tracked in the study.

The 2026 rate breakdown for Honolulu includes the state Transient Accommodation Tax (TAT) of 11% (including the "Green Fee"), County TAT of 3%, state General Excise Tax (GET) of 4.21%, and County GET of 0.50%, totaling to 18.71%.

A top opportunity: Hawaiʻi's new "Green Fee"
Allocations of the new "Green Fee" will pump many millions of dollars annually into projects addressing climate impacts and improving infrastructure for both Hawaiʻi residents and visitors.

These allocations also provide HTA with a rare opportunity to highlight the value of tourism for residents and to thank visitors for the difference they are making. Even if "Green Fee" proceeds are deposited into the state's General Fund, allocations for projects funded by the 0.75% add-on to the TAT are expected to be publicly disclosed.

It will be important for HTA to develop a thorough communications plan to inform both residents and visitors of how the state accommodations tax is building Hawaiʻi's climate resilience while improving key visitor assets for all to enjoy. Like New Zealand and others, Hawaiʻi can use this kind of messaging to build stronger relationships between visitors and residents.

Overview of the 2026-2030 Strategic Plan

FUNDAMENTALS FOR SUCCESS

This page will feature a graphic portraying the planning framework -- the Mission and Vision, the three Responsibilities, and six strategies (abbreviated) for each Responsibility. We will develop this once you finalize the plan.

The 2026-2030 Strategic Plan creates a sharp focus on fulfilling three core Responsibilities described by our governing statute, HRS 201B, to support a regenerative tourism economy for Hawaiʻi. For each Responsibility, we have set a clear Objective through 2030. Each Objective is to be fulfilled through actionable Strategies and Tactics. We will track performance by primary Key Performance Indicators (KPIs) and other success measures.

MAJOR NEW INITIATIVES FOR 2026-2030

While the 2026-2030 plan embraces a "Back to Basics" focus on fulfilling HTA's statutory responsibilities, it also incorporates many ways for HTA to lead Hawai‘i tourism in positive new directions. New initiatives in this plan include:

- To strengthen Hawai‘i's market competitiveness, conduct a brand and market segmentation study to differentiate Hawai‘i from competing "sun and sand" destinations, invigorate the Hawai‘i brand, and identify high-potential, high-spending traveler segments to drive increased spending.
- Create an air route sustainability and development plan to maintain load factors on current routes, sustain and build seat inventory from in-bound markets, and identify opportunities to attract routes from high-potential markets.
- Relaunch GoHawaii.com to give visitors highly personalized trip-planning tools while delivering insights for powerful "digital-first" marketing of high-priority market segments.
- Provide Hawai‘i-based visitor industry partners with opportunities to share targeted advertising on GoHawaii.com and other owned HTA communication channels.
- Develop an HTA Experience Development program to create significant new and enhanced visitor experiences while generating economic opportunities for local businesses, artists, makers, and growers.
- Strengthen HTA's sports committee by developing and implementing a comprehensive Sports Strategic Plan focused on recruiting and developing major sporting events that drive visitor growth and elevate Hawai‘i's global brand.
- Develop a comprehensive "agritourism" initiative to connect more producers and products to the visitor economy.
- Field a study to explore perceptions of *Aloha* for and by visitors, including prospective visitors, and identify strategies for improvement.
- Support the development of Hawai‘i as a premier training and educational center for the tourism community, as well as for students in Hawai‘i and around the world.

Strategic Pillar 1

BRAND MARKETING

HTA is the state agency responsible for promoting and marketing Hawai'i tourism to targeted travelers.

OBJECTIVE

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.

WHY?

For both community and industry, sustained investment in effective brand and targeted marketing is necessary to generate increased revenue for the state and county governments and the business sector. Along with destinations across the U.S., Hawai'i is impacted by a decline in international arrivals and a slower-than-expected recovery of business travel. On top of that, Hawai'i faces strong competition from better-funded, less expensive beach and island destinations, a shrinking airline seat inventory, growing threats to cruise activity, and a two-year pause on hosting citywide conferences. To build economic vitality without stressing our capacity for visitors, it is imperative to double down on attracting traveler segments with above average trip spending and strong alignment with community values. It will be equally important to differentiate our unique Hawai'i experience through strong, values-aligned branding.

KEY PERFORMANCE INDICATORS

- Grow **Average Daily Visitor Spending (ADVS**)
- Annual growth rate of **Visitor Spending** outpaces growth rate of **Visitor Arrivals**.
- **Return on Advertising Spend** – for every $ spent (in advertising), tax revenue generated
- Rising **intent to travel** in Major Market Areas (MMAs).
- Increase **traveler spending and visitation in shoulder seasons to generate activity** without straining capacity.

STRATEGIES AND TACTICS:

1. Identify and focus marketing outreach to include more higher-spending, high-value traveler segments.

- Conduct a brand and market segmentation study to identify additional productive high-value market segments, Hawai'i's readiness to compete for them, and the relevance of high-potential segments for each island and local community values.
    - Develop personas for each segment so everyone can understand who HTA is targeting.
- Refine ongoing targeted market segments, such as romance, avid traveler, and others.

- Initiate marketing co-ops to sustain and build air service in key international markets.
- Place more emphasis on the U.S. East market to stimulate visitation and spending.
- Inspire visitors to experience more events and attractions to drive additional visitor spending.
- Moderate visitor flows in peak travel seasons and stimulate visitation during slower periods.
- Drive efficiencies in market segmentation through a digital-first strategy.

2. Energize the Hawai‘i brand.
- Use the brand and market segmentation study to carve out a distinctive position for Hawai‘i among competing "sun and sand" destinations, invigorate the Hawai‘i brand, update brand guidelines, and identify product development needs and opportunities.
- Relaunch GoHawaii.com with modern tools and technology, such as AI, to provide visitors with a powerful, seamless user experience for exploring and planning a trip to Hawai‘i and position the website as a leader for digital-first marketing.
- Collaborate with DBEDT’s Creative Industries Division to uplift the Hawai‘i brand and enliven marketing and promotional activities.
- Strategically promote film and TV locations through integrated storytelling and partnerships that convert on-screen visibility into visitor inspiration and demand.

3. Strengthen Hawai‘i's global competitiveness for Meetings, Conventions, and Incentives (MCI) travel.
- Lead a task force of industry stakeholders to create a long-term plan to build Hawai‘i's competitive position for MCI travelers, using the reimagined Hawai‘i Convention Center as a launchpad for growth and a leading destination for sustainable conferences.
- Highlight Hawai‘i’s unique cultural identity in branding to differentiate from other destinations.
- Determine an appropriate level of citywide conference incentives for the convention center to remain competitive in the MCI marketplace and improve Hawai‘i Convention Center profitability.
- Focus MCI sales strategy on Hawai‘i’s core competencies and DBEDT's targeted key growth economic clusters to attract conferences and meeting attendees aligned with Hawai‘i's business strategy.
- Increase recruitment of incentive trips and meetings during the convention center renovation to mitigate loss of future business and build interest in the re-launch.

4. Identify optimal distribution of visitation and high-value traveler segments for each island.
- Collaborate with island communities to prioritize attributes of each island for promotion, to differentiate each island experience, stimulate interisland travel, and reflect local priorities for visitation.

- Leverage attraction and development of visitor experiences, infrastructure for international markets, and tours — especially growing interest in domestic tours — to stimulate interisland visitation and responsible travel.

5. Educate and engage all visitors to travel responsibly throughout Hawaiʻi.
- Integrate pre- and post-arrival messaging efforts into a single branded campaign for greater impact and consistency.
- Partner with hotels, attractions, and airlines to educate visitors about desirable Hawaiʻi travel practices before and after arrival.
- Collaborate with the Department of Land and Natural Resources (DLNR) and other stakeholders to identify top messaging priorities for visitors. Develop and distribute relevant messages for HTA and partners to share.
- Explore the use of artificial intelligence to identify and correct misinformation on social media.

OTHER SUCCESS MEASURES
Monitoring these additional indicators will provide further insights into outcomes of the strategies and tactics above. Results will be shared in HTA's annual report to the legislature.

- **International visitation:** Diversify international visitors to ___% by 2030. Currently it is 23%.
- **Market segmentation:** Campaign effectiveness studies show above-average spending for each targeted segment.
- **MCI growth:**
  - Number of Events
  - Mixture of Events
  - Room Nights
  - Cost per person per day spent at Hawaiʻi Convention Center
  - Intent to return
- **Campaign effectiveness:** HTA marketing ROI rated "above average" for U.S. DMOs.
- **Visitor Message Recall**: Increase percentage for visitors recall hearing or seeing information about "safe and responsible travel", and "Caring for People, Environment, and Culture," both pre-arrival and during trip.
- **Increase in First Time vs Repeat Visitors**

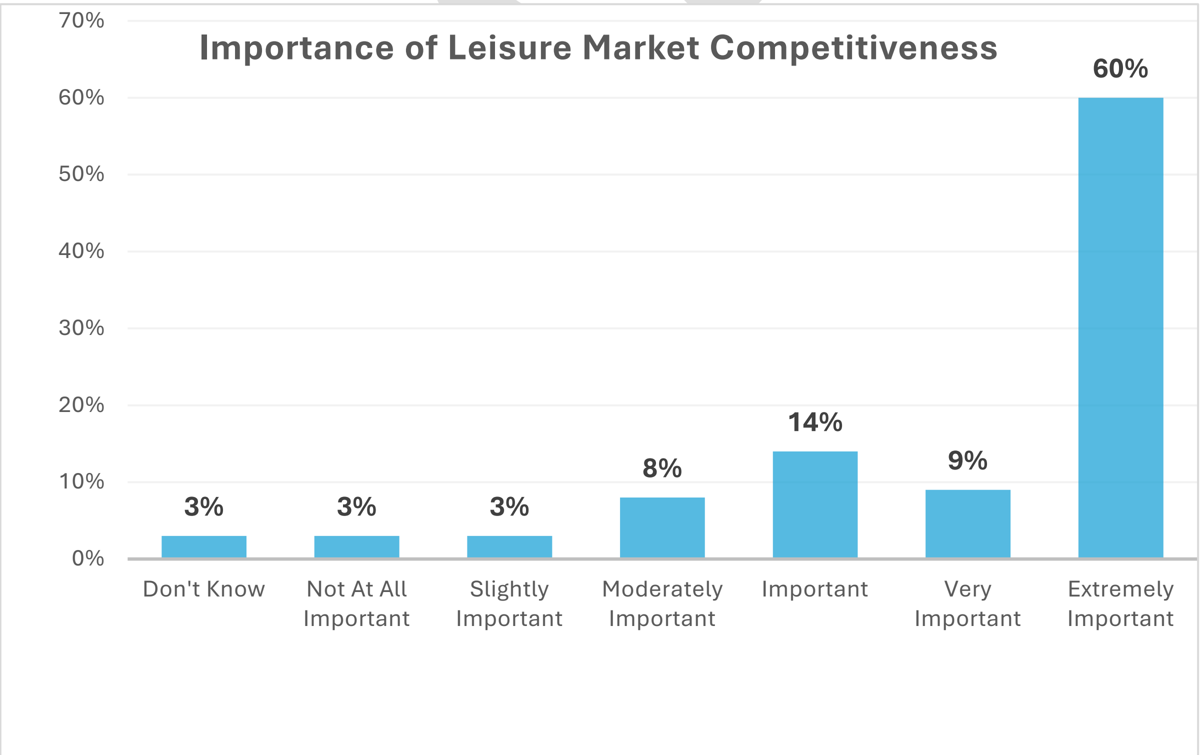
What Is a High-Value Traveler?
In recent years, HTA's definition of a high-value traveler has centered on higher-income households whose buying habits show sensitivity to natural resources, culture, and people. We call them our High-Value Mindful Hawaiʻi Travelers.

With this plan, we expand our focus to include purpose-driven travelers who may not earn the most but outspend other types of travelers to pursue an interest, whether for a sport or event, wellness, business, luxury, or to reduce their carbon impact. New research will point us to the highest-potential travelers. This will be a path to generating more economic impact from fewer visitors.

DBEDT's 2024 Visitor Statistics already show that business travelers' average daily spend of $302.50 in 2024 outpaces the leisure travelers' average spend of $238.30. One of our highest-value visitors of all are honeymooners, who spent $337.70 per day.

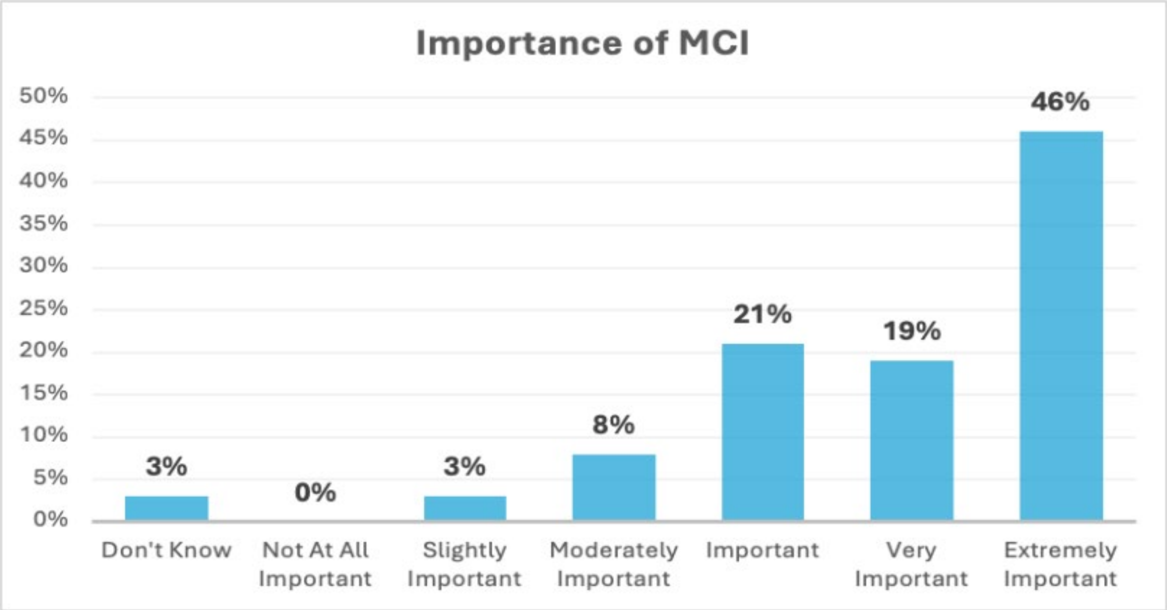
Typically, the farther a visitor travels to Hawaiʻi, the more they spend. U.S. East travelers spent an average of $264.60 per person per day in 2024, well above the average $244.70 for all travelers and $229.80 for U.S. West travelers — and for many international markets as well. Plus, nearly 20% of U.S. East visitors spread their dollars across multiple islands, and almost 40% visit Neighbor Islands.

China and Korea provide our highest-value international travelers, with average daily spends in 2024 of $353.37 and $318.57, respectively. Though relatively few in number, more than 80% stay in hotels. Visitors staying in hotels spend more on average ($281.50 in 2024) than those who pick condos ($247.60) or rental houses ($243.90) and far more than those staying in timeshares or with friends.



A large majority of industry respondents agree it's "extremely important" to improve Hawaiʻi's competitiveness for leisure travelers.

Source: PPRC/HTA Industry Survey, Aug 2025



Industry respondents also endorse the importance of building competitiveness for MCI travelers, with 65% saying it's "very" or "extremely" important.

Source: PPRC/HTA Industry Survey, Aug 2025

Strategic Pillar 2

EXPERIENCE DEVELOPMENT

HTA's statutory responsibilities include improving visitor experiences and services in ways that generate "net positive" benefits for residents.

OBJECTIVE

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

WHY?

Experience development is a path to connecting more local businesses, outfitters, artists, makers, growers, and producers to the tourism economy while satisfying rising traveler demand for uniquely Hawaiian experiences. It further differentiates Hawaiʻi against its competitors, expands our array of visitor experiences, and creates new reasons for high-value travelers to visit more islands. It can stimulate demand for other sectors like agriculture and arts and culture, channel growth into places seeking revitalization, ease pressure on places experiencing strain, and safeguard natural resources. By aligning community-based programs and regenerative tourism efforts into one focused initiative, HTA can lift up product development and technical assistance with greater impact, giving more local entrepreneurs and communities a stake in tourism while creating new ways for visitors to contribute to local economies.

KEY PERFORMANCE INDICATORS

- **Visitor Satisfaction:** "Exceeded Expectations" ratings improve by 2 percentage points for Major Market Areas (MMAs) between 2025 and 2030.
- **Resident Sentiment:** Agreement with “Tourism has brought more benefits than problems” rises from 58% in 2025 to 65% by 2030.
- Increase **traveler spending and visitation in shoulder seasons** to generate activity without straining capacity**.**

STRATEGIES AND TACTICS

1. **Establish an HTA Experience Development Program.**
   - Create an Experience Development Program to build on existing community-based programs, lead product development initiatives, and stimulate regenerative tourism strategies.
   - Design and align tourism product development initiatives with community priorities, ensuring they are regenerative and sustainable to deliver positive impacts for both communities and the environment.
   - Continue to work with Native Hawaiian organizations and practitioners to lead product design, protocols, and storytelling so tourism directly strengthens cultural practice and language.

- Support initiatives and educational programs recognizing Hawaiʻi's cultural diversity and celebrating contemporary expressions of Aloha.
- Coordinate internal efforts to bridge the gap between community-aligned experiences and market readiness, prioritizing experiences that attract high-value travelers.

2. **Support the enhancement of major attractions and experiences to improve Hawaiʻi's competitiveness for high-value visitors and major events.**
   - Strengthen HTA's sports committee to actively pursue and develop significant sports events that generate community benefits and high-value visitation, particularly during shoulder seasons.
   - Support feasibility studies to guide sustainable improvement or development of high-potential, "on-brand" experiences.
   - Develop branded experiences or "trails" to create, highlight, and drive visitation to signature offerings, such as Hawaiʻi Island's Kona coffee region.
   - Prioritize funding of festivals and events that fill shoulder seasons and generate economic impact for local communities, foster positive relationships between visitors and residents, and advance Hawaiian culture.
   - Evaluate outcomes and build understanding around these attractions' economic contributions.
   - Develop film/tv-based visitor experiences to leverage Hawaiʻi's iconic on-screen locations.

3. **Strengthen pathways for local entrepreneurs, creators, and producers to join the tourism economy.**
   - Foster multi-purpose hubs connecting travelers with authentic local experiences and products, artists, outfitters, cultural information, and potentially transit options.
   - Foster an agritourism initiative to connect more producers and products with the tourism economy.
   - Integrate and expand programs that equip small businesses to engage more effectively with visitors.
   - Support local entrepreneurship by connecting tourism operators with local producers, arts and culture, and service providers, potentially through a statewide directory, and amplifying the "Hawaiʻi Made" brand.

4. **Advance understanding and preservation of Hawaiian culture.**
   - Encourage use of Native Hawaiian voices and language to share cultural values and traditions in signage, digital tools, and other touchpoints throughout the visitor journey.
   - Partner with hotels, attractions, transit systems, and airlines to share accurate and meaningful representations of Hawaiian culture and aloha.
   - Collaborate with Hawaiian cultural organizations to identify practices for sharing cultural sites with visitors.

- Require authentic portrayals of Hawaiian culture for all HTA-funded activities supporting Hawaiian culture, including communications, events, and sponsorships.
- Field a study to explore perceptions of *Aloha* among prospective and past visitors and residents to address concerns that visitors may feel unwelcome and identify ways to promote positive interactions among visitors and residents.

5. **Implement a proactive, data-driven destination management approach that balances visitor distribution, safeguards cultural and natural resources, and prioritizes community well-being.**

- Develop and implement destination management action plans that prevent overcrowding and congestion, protect cultural and natural resources assets, ensure exceptional experiences for both visitors and residents, and enhance the quality of life for residents.

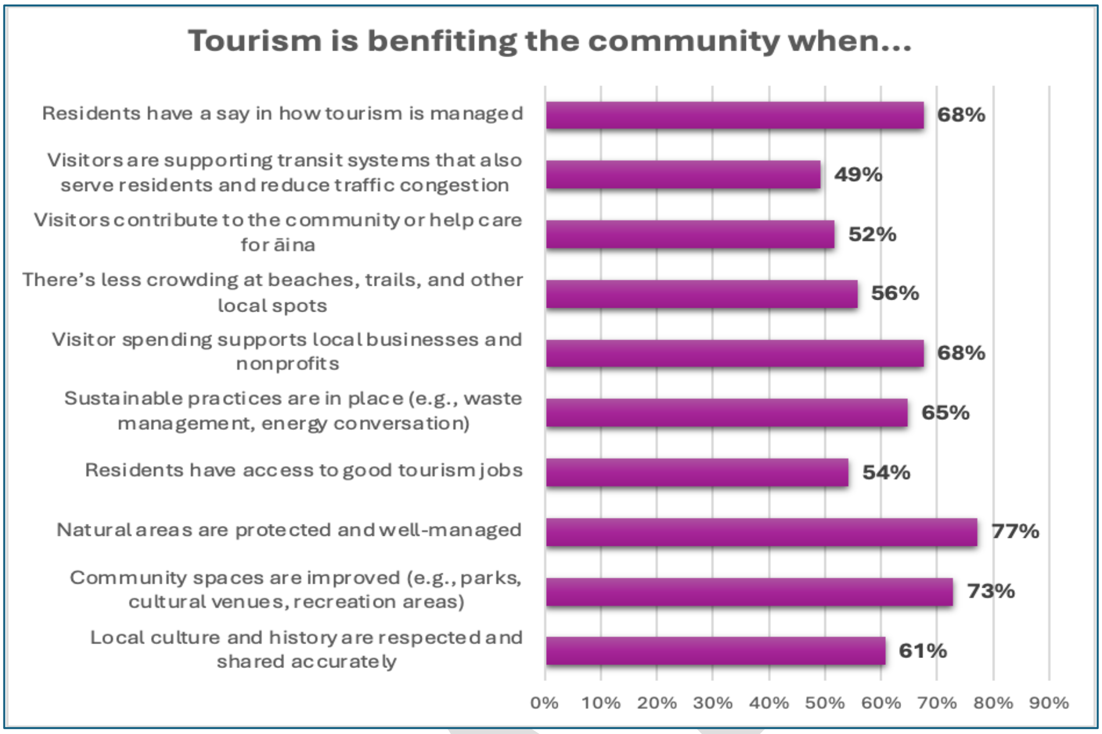
6. **Continue supporting Hawaiʻi's sustainability goals.**

- Identify ways to enable and equip visitors and tourism-related businesses to embrace sustainable actions.
- Develop a toolkit for local businesses and attractions on how to operationalize regenerative and sustainable practices and communicate them effectively to visitors.
- Align HTA messaging and programs with the state's Aloha+ Challenge.

OTHER SUCCESS MEASURES

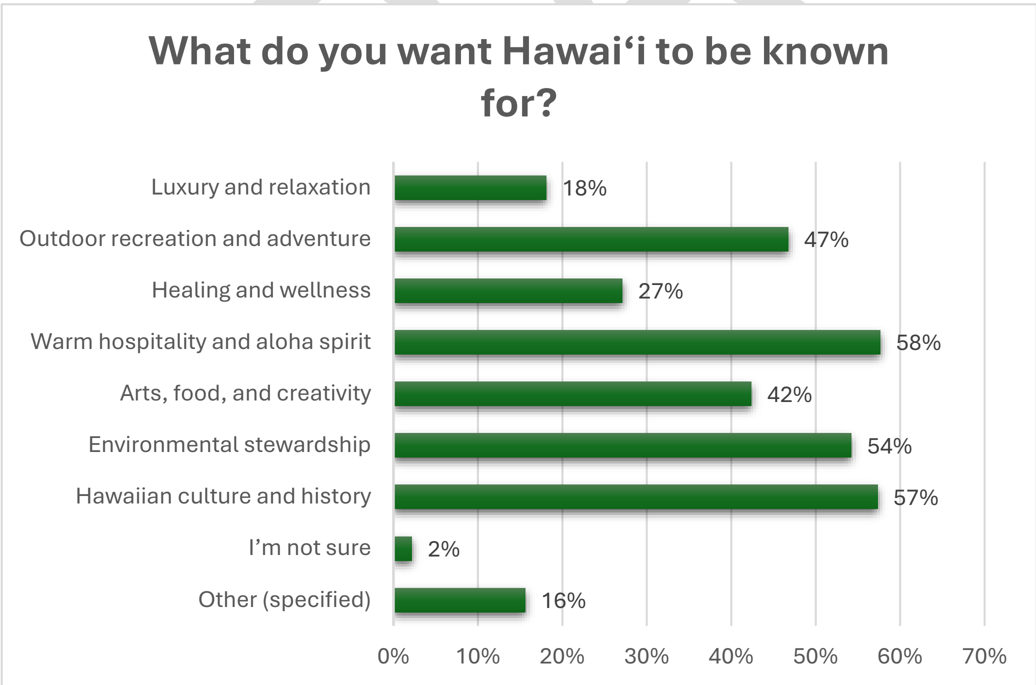
Monitoring these additional indicators will provide further insights into outcomes of the strategies and tactics above. Results will be shared in HTA's annual report to the legislature.

- **Sports events:** Visitation from sports events rises by __% between 2026 and 2030.
- **Trails:** Four new cultural or product-based trails are branded and marketed by 2030.
- **Business development:** Number of tourism-related small- and medium-size enterprises increases by 5% from 2025 to 2030.
- **Experience of Aloha:** MMGY Portrait of American Traveler study shows drop in percentage of visitors agreeing that "I have heard/read that Hawaiʻi residents are opposed to visitors coming" from 13% in 2025 to __% in 2030.
- **DMAP milestones**: Delivered on time and on budget.
- **Adoption of HTA sustainability tools and initiatives:** Monitor participation in HTA-funded sustainability programs to assess value and guide refinements.
- **Awareness of HTA activities:**- Awareness of Hawaiʻi's Destination Management Action Plans (DMAPs) rises from 45% in 2025 to over __% in 2030.
- **Quality of life:** Agreement that "tourism is an industry that enhances residents' quality of life" rises from 55%.



Residents are likely to believe tourism is beneficial when they see visitor spending supporting local businesses or nonprofits or sustainable practices being put into place.

Source: PPRC/HTA Community Survey, Aug 2025



Residents especially see promise in advancing Hawaiʻi's reputation for hospitality, Hawaiian culture, and environmental stewardship. Many also support outdoor recreation and arts, food and creativity.

Source: PPRC/HTA Community Survey, Aug 2025

Strategic Pillar 3

TOURISM LEADERSHIP

HTA is responsible for collaborating with public, private, and community stakeholders to manage visitation and foster a regenerative, resilient tourism economy.

OBJECTIVE

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.

WHY?

Hawai‘i’s tourism economy faces several interconnected challenges, including overcrowding, workforce shortages, housing pressures, environmental impacts, aging infrastructure, and vulnerability to crises. No single agency or sector can resolve these issues on its own. The future of Hawai‘i’s tourism relies on strong public trust, collaborative governance, and a shared commitment to delivering meaningful benefits for communities, the environment, and the economy. Establishing formal partnerships, defining clear responsibilities, ensuring shared accountability, and promoting transparency are essential steps to finding solutions, leveraging resources, restoring trust, and building resilience for Hawai‘i’s economy and communities in the face of future crises.

KEY PERFORMANCE INDICATORS

- **Resident satisfaction**. Agreement with "Tourism is being better managed on my island" rises from 52% in 2025 to __% in 2030 and “HTA actively works to manage tourism in our state through its DMAPs”
- **Partner satisfaction**: Cross-sector partners report increasing satisfaction with HTA collaborations in a new annual partner survey from 2026 to 2030.
- **Increased funding**. HTA secures increased funding for initiatives in this plan.

STRATEGIES AND TACTICS

1. Clarify and strengthen HTA's role as leader of Hawai‘i tourism.

- Enhance HTA’s operational efficiency and accountability by conducting a full organizational assessment, aligning staffing and resources with the new strategy, improving procurement processes, and establishing clear performance measures that support a high-functioning, positive organizational culture.
- Increase opportunities to engage visitor industry, state and county governments, nonprofits, and community expertise in HTA planning and program development.
- Strengthen ties with other sectors to build understanding of tourism’s values and shared benefits.

- Leverage advanced technologies, including artificial intelligence, to strengthen HTA’s marketing, communications, planning, and evaluation functions and improve overall operational efficiency.
- Launch a “Partners in Stewardship” program to recognize successful cross-agency or cross-sector collaborations, potentially at the annual Tourism Conference.

2. Formalize interagency partnerships.

- Update the Tourism Functional Plan to support long-term planning to maintain and improve key visitor infrastructure (including airports and public lands) in line with local priorities, backed by an island-by-island inventory.
- Establish MOUs with state and county agencies, beginning in FY2027, to define roles, responsibilities, and desired outcomes for tourism-related initiatives involving HTA, including DMAPs. Update MOUs annually to address collaboration around an annual action agenda.
- Facilitate a standing interagency/island tourism roundtable to foster cross-learning, set a shared action agenda, and assess progress on shared initiatives.

3. Strengthen island-based collaboration.

- Launch a statewide Visitor Management Dashboard during FY2027, to track DMAP outcomes and visitor insights from the statewide app and HTA's website.
- Develop opportunities for industry and community engagement at least twice a year on each island to inform planning and strengthen local partnerships.

4. Communicate collaboratively and proactively.

- Establish a periodic media briefing to present forward-looking tourism plans and report on visitor economy performance, especially to identify positive impacts of visitor spending and progress with the "Value Over Volume" marketing strategy.
- Engage with residents in periodic community forums to share initiatives, report outcomes, gather input, and publish follow-up actions within 30 days.
- Reimagine the annual report to focus on tourism outcomes and evidence-based benefits of tourism rather than HTA activities.
- Develop a statewide public information campaign to raise awareness of the need to market Hawai‘i responsibly to sustain a visitor economy that can support community well-being.
- Advocate for transparency around allocation of tourism-generated tax revenues and work with DBEDT to demonstrate the true contribution of the visitor economy to state and county budgets.
- Create visitor-facing communications that acknowledge their role in mutually beneficial tourism, describing how their spending creates benefits, such as for "Green Fee"-funded improvements.

4. Support workforce development.

- Update and implement HTA’s Tourism Workforce Development Plan. This plan should focus on making Hawaiʻi a premier training and educational center for the tourism community, both for students in Hawaiʻi and around the world.
- Expand collaborations with the University of Hawaiʻi’s School of Travel Industry Management and UH system’s tourism and culinary programs.

- Explore developing an initiative to address employers' top challenge: recruitment and training of managers.

5. Build the long-term resilience of the tourism economy.

- Create an air route sustainability and development plan to protect load factors on current routes, sustain and build seat inventory from inbound markets, and identify opportunities to attract routes from high-potential markets.
- Support contingency planning and crisis protocols for natural hazards, terrorism, infectious disease, and other events that could impact tourism.
- Develop education, prevention, and preparedness programs for visitor safety, such as a toolkit equipping vacation rental operators to alert guests to emergency plans.
- Leverage HTA’s authority for policy development and technical assistance to support research and policies that address major social issues impacting tourism.
- Explore the feasibility of concentrating tourism activities in designated, highly managed areas to reduce impacts on resident spaces.
- Support compliance and responsible operation of legal short-term vacation rentals.

6. Strengthen Hawaiʻi Convention Center’s role as an economic hub.

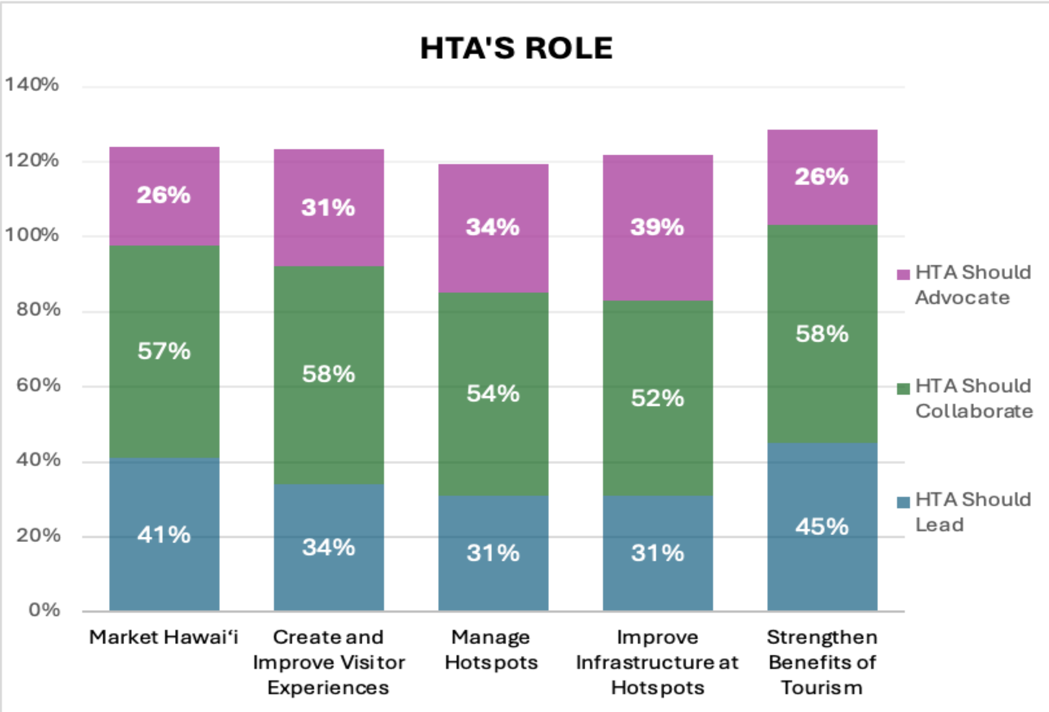
- Support efforts to complete repair and maintenance projects on time and on budget based on the HCC’s 6-year Capital Improvement Projects plan.
- Continue to use HCC for community events, cultural festivals, and local business expos during off-peak convention periods.
- Develop local business integration programs and encourage local sourcing for catering, décor, and event services.
- Partner with the University of Hawaiʻi School of Travel Industry Management and the University of Hawaiʻi system, other universities in Hawaiʻi, and training programs to provide internships and event staffing opportunities.

Additional Measures of Success

Monitoring these additional indicators will provide further insights into outcomes of the strategies and tactics above. Results will be shared annually in the Strategic Tourism Management Plan.

- **Visitor satisfaction:** 90%+ visitors from MMAs rate their experience as “excellent.”
- **Dashboard/App Insights**: Reduced pressure and improved management of sensitive or high-use sites.
- **Partner satisfaction:** Satisfaction rate of DMAP advisory board members and other identified partners is monitored.

- **Stronger community and industry engagement**: Identification of decisions and actionable insights resulting from industry and community participation DMAP Advisory Groups, committees, and forums.



Tourism industry members believe HTA's primary role is to collaborate. Source: PPRC/HTA Industry Survey, Aug 2025

Why Marketing Matters

While many in Hawaiʻi seem to believe that "Hawaiʻi markets itself," HTA's independent campaign effectiveness research shows bigger marketing budgets yield bigger economic returns — and that visitors who recall seeing HTA marketing far outspend those who don't.

SMARInsights' analysis shows HTA's 2024 U.S. campaign yielded an extremely high return on investment (ROI) — $406 in visitor spending and $36 in taxes for every $1 spent on media. HTA's ROI was 85% higher than the average $219 ROI tracked for state tourism offices with media spends of $5 million or more.

The April 2025 report also shows HTA's 2024 media budget of $5.288 million generated nearly $2.15 billion in spending and about $190.8 million in state and county TAT and GET — just from the U.S. travelers who recalled seeing parts of the 2024 campaign.

The study also showed that these "ad-aware" U.S. travelers spent an average of $6,264 per trip, or $308 per person per day. That was 26% more than the daily average of $244 reported by DBEDT for a U.S. visitor in 2024. "Ad-aware" visitors also were far more likely to say they wanted to visit Hawaiʻi (43%) than those who were unaware (23%).

SMARInsights noted that 2024 results fell short of 2023, mainly because the U.S. media budget was cut from $8.32 million in 2023 to $5.288 million in 2024. Although the state saved $3.0 million, "ad-aware" visitor spending fell by $1.237 billion in 2024.

Implementation Timeline

To be created when Objectives, Strategies and Tactics are finalized; this will provide a timeline plus assignments of responsibility. Probably two pages.

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HTA Staff

HTA Advisory Board

DBEDT

Other

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EXECUTIVE
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Brooke Wilson, Chief of Staff, Governor's Office

LEGISLATIVE
Sen. Ron Kouchi, Senate President
Rep. Nadine Nakamura,* House Speaker
Sen. Lynn DeCoite, Chair, Senate Committee on Economic Development and Tourism
Sen. Donna Mercado Kim, Committee Member, Senate Committee on Economic Development and Tourism
Sen. Glenn Wakai, Vice Chair, Senate Committee on Economic Development and Tourism
Rep. Adrian Tam, Chair, House Committee on Tourism
Rep. Chris Todd, Chair, House Finance Committee

HTA ADVISORY BOARD MEMBERS
Kimberly Agas, General Manager, Aulani, A Disney Resort & Spa
Leah Belmonte, Director, HR, Mahi Pono, LLC
Mericia Elmore, Executive Director, SAG-AFTRA Hawaiʻi Local
Terry Fischer, President and Owner, Polynesian Adventure Tours
Joel Guy, Executive Director, The Hanalei Initiative
Troy Lazaro, Kumu hula and cultural steward
James McCully, Orchid Breeder at Mauna Kea Orchids
Danny Ojiri, Vice President, Outrigger Hospitality Group
Lisa Paulson, Chief Executive Officer, Maui Food Bank
Lanai Tabura, Emmy winning TV host
Chris West, President, ILWU Local 142
Linda Wong, President and COO, World of Aloha

OTHER INTERVIEWEES
Jerry Agrusa, UH Professor of Travel Industry Management
Amy Asselbaye, Executive Director, Honolulu Office of Economic Revitalization
Carl Bonham, Executive Director, UHERO
Paul Brewbaker, Principal of TZ Economics
Nalani Brun, Economic Development Director - Kauai
David P. Carey III,* Retired Outrigger President & CEO
Dawn N. S. Chang, Chairperson, DLNR Board and Commission on Water Resource Management
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Rick Egged, Executive Director, Waikiki Improvement Assn
Jerry Gibson, President, Hawaiʻi Hotel Alliance
Tyler Gomes, Chief Administrator, Kilohana
Mufi Hannemann,* President & CEO, Hawaiʻi Lodging and Tourism Association
David Hu, President and CEO, Pleasant Holidays
Sharon Hurd, Chairperson of the Board of Agriculture & Biosecurity

Jason Ito, Director, Administration, Labor and Community Relations for Kyo-ya Management Company
Kelly Knox, Corporate Responsibility Advisor, Southwest Airlines
Cynthia Lallo, Maui County Chief of Staff
James Mak, Professor Emeritus, UHERO
Benson Medina, R&D Director, Hawaiʻi Island
Teri Orton, General Manager, Hawaiʻi Convention Center
Roy Pfund,* President and CEO, Roberts Hawaiʻi
Ben Rafter, CEO, Springboard Hospitality
Aaron Salā,* President & CEO, Hawaiʻi Visitors and Convention Bureau
Ed Sniffen, Director, Hawaiʻi Department of Transportation
Dan Spencer, Director, School of Travel Industry Management, University of Hawaiʻi at Manoa
Eric Takahata, Managing Director, Hawai'i Tourism Japan
James Kunane Tokioka,* Director, Department of Business, Economic Development, and Tourism
Keith Vieira,* Principal, KV & Associates Hospitality Consulting LLC
John White, CEO, Hawaiʻi Farm Project
Ron Williams, CEO, Atlantis Submarines

** Former HTA Board Member*

Legal and Statutory Framework for Each Strategic Pillar

Strategic Pillar 1: Brand Marketing

- **HRS §201B-7(a)(1)/ 7(b)(3):** Requires the HTA to promote, market, and develop Hawai'i's tourism industry, with the authority to engage contractors.
- **HRS §201B-7(a)(2)/ 7(b)(4):** Allows and requires HTA to engage contractors for market-development research.
- **HRS §201B-6:** Requires HTA to create an annual Strategic Tourism Management Plan that advances tourism marketing, complies with destination management best practices, and promotes regenerative tourism. The plan also must include measures of effectiveness.
- **HRS §201B-3(a)(16)**: Allows HTA to advise the private sector in developing tourism-related activities and resources.

Strategic Pillar 2: EXPERIENCE DEVELOPMENT

- **HRS §201B-1:** Includes "improve visitor experiences" and "ensure that the provision of services enhances the visitor experience" among HTA's destination management responsibilities.
- **HRS §201B-1:** Defines regenerative tourism as a practice designed and managed to bring "net positive contributions" to local communities and that implements innovative and sustainable economic development plans.
- **HRS §201B-6:** Requires HTA to create an annual Strategic Tourism Management Plan that advances tourism marketing, complies with destination management best practices, and promotes regenerative tourism. The plan also must include measures of effectiveness.
- **HRS §201B-3(19), §201B-7(a)(3):** Allows HTA to coordinate with counties and others in the public and private sectors to create new experiential products and engage in product development.
- **HRS §201B-7(a)(4), 201B-3(18):** Allows HTA to promote, develop, or coordinate festivals, community and cultural events, as well as sports-related or environmental stewardship activities.
- **201B-3(a)(28)**: Allows HTA to "focus on perpetuating the uniqueness of Hawaiian culture and communities and their significance to the quality of the visitor experience."

Strategic Pillar 3: TOURISM LEADERSHIP

- **HRS §201B-1:** Defines destination management as a collaborative and coordinated process with public, private, and community stakeholders to manage the various elements of a visitor destination.
- **HRS §201B-1:** Defines regenerative tourism as a practice designed and managed to bring "net positive contributions" to local communities and that implements innovative and sustainable economic development plans.
- **HRS §201B-7(b)(1), §201B-6.2:** Mandates development of a long-term statewide tourism strategic plan and a regularly updated tourism functional plan describing economic, community, and sustainability goals.
- **HRS §201B-7(b)(2), §201B-6.4:** Requires HTA to develop and implement DMAPs for four counties.
- **HRS §201B-3(a)(20):** Allows HTA to establish a public information and educational program to increase understanding of tourism and tourism-related problems.