



**KA HĀLĀWAI KŪMAU A KE KŌMIKE ALOWELO
KE'ENA KULEANA HO'OKIPA O HAWAII**

**BRANDING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY**

**HĀLĀWAI KELEKA'A'IKE
VIRTUAL MEETING**

Pō'akahi, 17 Malaki 2025, 1:30 p.m.
Monday, March 17, 2025 at 1:30 p.m.

E ho'olele ʻiwa ʻia ka hālāwai ma o ka Zoom. Meeting will be live streaming via Zoom.

<https://us06web.zoom.us/j/82506391295>

E noi ʻia paha ʻoe e kāinoa me kou inoa a leka uila paha. E ʻoluʻolu, e hoʻokomo i kou inoa piha akā hiki nō iā ʻoe ke hoʻohana i ka inoa kapakapa e like me kou makemake.

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

Kelepona / Call In: 16694449171
Helu Hālāwai / Webinar ID: 825 0639 1295

Hiki i ka lehulehu ke hōʻike manaʻo ma o ka palapala a i ʻole ma o ka waha. E kau palena ʻia ka hōʻike manaʻo waha (ma ke kino a i ʻole ma o ka Zoom) he ʻelima minuke ka lōʻihi no kēlā me kēia kumuhana. E kāinoa no ka hōʻike manaʻo waha ma ke pākaukau hoʻokipa ma ka lumi hālāwai. E kāinoa no ka hōʻike manaʻo waha ma o ka Zoom ma o ke pihi "Q&A."

Members of the public may provide written or oral testimony on agenda items. Oral testimony (in-person or via Zoom) will be limited to five minutes for each testifier per agenda item. Signup for oral testimony via Zoom will be accepted through the Q&A feature on Zoom.

E hoʻohui ʻia nā palapala hōʻike manaʻo i hiki ma ka pūʻolo hālāwai. E leka uila ʻia nā palapala iā Carole Hagihara-Loo ma carole@gohta.net, a i ʻole, e lawe kino ʻia i ke keʻena. No nā palapala hōʻike manaʻo i hōʻea mai ma hope o ka paʻa o ka pūʻolo hālāwai (ʻelua lā ma mua o ka hālāwai), e kākaʻahi ʻia nā kope i ke kōmike a e mākaukau no ka ʻike ʻia e ke anaina ma ka hālāwai.

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

AGENDA

1. *Ho'omaka a Wehena*
Call to Order and Opening Protocol
2. *Kikolā*
Roll Call to Announce Name of Participating Board Members and to Identify Who Else is Present with Board Member if Location is Nonpublic
3. *'Āpono Mo'olelo Hālāwai*
Approval of Minutes of the February 19, 2025 Branding Standing Committee Meeting
4. *Kūkākūkā A Ho'oholo I Ke Koho 'Ana I Hope Luna Ho'omalū*
Discussion and/or Action on the Selection of a Vice Chair for the Branding Standing Committee
5. *Hō'ike, Kūkā A Ho'oholo No Nā Hana Hokona 'Amelika 2025 ****
Update on the U.S. Maui Emergency Marketing Campaign ***
6. *Hō'ike, Kūkā, A Ho'oholo No Kā HTA Papa Hana Hokona 2026*
Presentation and/or Discussion on the 2026 HTA Marketing Plan
7. *Ho'oku'u*
Adjournment

*** *'Aha Ho'okō: Ua hiki i ka Papa Alaka'i ke mālama i kekahi hālāwai kūhelu i kū i ka Hawai'i Revised Statutes (HRS) § 92-4. E mālama 'ia kēia hālāwai kūhelu nei ma lalo o ka § 92-5 (a)(4), § 92-5 (a)(8) and §201B-4(a)(2) no ka pono o ko ka Papa Alaka'i kūkā a ho'oholo 'ana i nā nīnūnē a nīnau i pili i ko ka Papa Alaka'i kuleana me ko ka Papa Alaka'i loio. He hālāwai kūhelu kēia i 'ole paulele 'ia ka 'ikepili a i mea ho'i e mālama kūpono ai i ko Hawai'i 'ano, he wahi i kipa mau 'ia e nā malihini.*

*** **Executive Session:** The Board may conduct an executive session closed to the public pursuant to Hawai'i Revised Statutes (HRS) § 92-4. The executive session will be conducted pursuant to HRS § 92-5 (a) (2), § 92-5 (a)(4), § 92-5 (a)(8) and §201B-4(a)(2) for the purpose of consulting with the board's attorney on questions and issues pertaining to the board's powers, duties, privileges, immunities, and liabilities; to consider hiring and evaluation of officers or employees, where consideration of matters affecting privacy will be involved; and to discuss information that must be kept confidential to protect Hawai'i's competitive advantage as a visitor destination.

Inā he lawelawe a mea like paha e pono ai ke kīnānā, e ho'oka'a'ike aku me Carole Hagihara-Loo ma (808)-973-2289 a ma ka leka uila e like me ka wikiwiki i hiki, 'a'ole ho'i a ma 'ō aku o ka 'ehā lā ma mua o ka hālāwai. Inā 'ike 'ia he noi i ka lā ma mua o ka hālāwai,

e ho'ā'o mākou e 'imi i ka lawelawe a mea like paha, 'a'ole na'e ho'i e hiki ke ho'ohiki 'ia ke kō o ua noi lā. Ua noa pū kēia ho'olaha ma nā kino 'oko'a e like me ka mea pono.

If you need an auxiliary aid/service or other accommodation due to a disability, contact Carole Hagihara-Loo at (808) 973-2289 or carole@gohta.net as soon as possible, preferably no later than 3 days prior to the meeting. **Requests made as early as possible have a greater likelihood of being fulfilled.** Upon request, this notice is available in alternative/**accessible** formats.

E like nō me ka 'ōlelo o ke Kānāwai Hawai'i i ho'oholo 'ia māhele 92-32.7, e mālama ana ke Ke'ena Kuleana Ho'okipa o Hawai'i i kekahi wahi e hiki ai ka po'e o ka lehulehu ke noho a komo pū ma nā hālāwai ma o ka ho'ohana 'ana i ka 'enehana pāpaho (ICT). Aia ana kēia 'enehana pāpaho ma ka papahale mua o ka lumi ho'okipa i mua o ke Ke'ena Kuleana Ho'okipa o Hawai'i ma ka Hale 'Aha. 'O 1801 Kalākaua Avenue, Honolulu, Hawai'i, 96815 ka helu wahi.

In accordance with HRS section 92-3.7, the Hawai'i Tourism Authority will establish a remote viewing area for members of the public and board members to view and participate in meetings held using interactive conference technology (ICT). The ICT audiovisual connection will be located on the 1st Floor in the Lobby area fronting the Hawaii Tourism Authority at the Hawai'i Convention Center at 1801 Kalākaua Avenue, Honolulu, Hawai'i, 96815.

3

**Approval of Minutes of the
February 19, 2025
Branding Standing Committee Meeting**



**BRANDING STANDING COMMITTEE MEETING
HAWAII TOURISM AUTHORITY
Wednesday, February 19, 2025, at 1:30 p.m.**

Virtual Meeting

MINUTES OF THE BRANDING STANDING COMMITTEE MEETING

MEMBERS PRESENT:	Roy Pfund (Chair), Kimberly Agas (Vice-Chair), David Arakawa, Mufi Hannemann, Lisa Paulson
MEMBERS NOT PRESENT:	Chris West
HTA STAFF PRESENT:	Daniel Nāho'opi'i, Isaac Choy, Caroline Anderson, Jadie Goo, Trishia Mendoza, Jennifer Bastiaanse
GUESTS:	Gina Chun, Jeffrey Eslinger, Lei-Ann Field, Kara Imai, Aaron Salā, Lynn Whitehead
LEGAL COUNSEL:	John Cole

1. Call to Order and Opening Protocol

Chair Pfund called the meeting to order at 1:34 p.m. Mr. Nāho'opi'i did the opening protocol.

2. Roll Call to Announce Name of Participating Board Members and to Identify Who Else is Present with Board Member if Location is Nonpublic

Ms. Goo did the roll call, and members were confirmed in attendance by themselves.

3. Approval of Minutes of the December 12, 2024 Branding Standing Committee Meeting

Mr. Hannemann moved to approve the minutes, and Vice Chair Agas seconded it. Ms. Goo did the roll call, and the motion passed unanimously.

4. General Remarks by Committee Chair Pfund

Chair Pfund opened with some remarks. He said he was fortunate to be a member when Mr. Miyasato was around and hoped to follow in his footsteps. He thanked the HTA staff for their support.

5. Presentation and/or Discussion on the Preparation of the 2026 HTA Marketing Plan

Mr. Nāho'opi'i started the discussion for the 2026 marketing plan. The marketing plan established through the committee then informs what the contractors/GMTs will be doing for the calendar year 2026. He spoke about top-line concepts and basic strategies they think are appropriate for 2026, addressing issues they see in the market, e.g. changes in demographics, demands, competition, etc. In March, all their international and local marketing partners will be in town, and they will take some of the input and work together to ensure that the marketing plan addresses those issues. In March, they will report to the committee what they have learned and fine-tune it. The objective is to have a final marketing plan by May because that is when the Board approves their budgeting for the upcoming year. The marketing plan should determine how much to spend in each market, what kind of additional programs they will need, and whether to increase MCI or additional programs to shore up some of what they are doing in product development.

In June, the Board approves a final budget and sends out more detailed plans. The GMTs will advise them on the amount of money that will be allocated in each market. They will then go back to the Brand Marketing Plan and discuss what they will be doing for the year following the guidelines and what targets they will be looking at. There will be another round of discussions and presentations to the Board in August, and in September, they will push out the marketing opportunities to get industry partners on board. They will have their conference at that time, where the industry partners can meet in person with the GMTs to discuss more details on how they could be integrated into it and see what kind of campaigns will be coming up.

They want to ensure the marketing committee is involved in giving their input. They also want a robust marketing plan coming from the HTA staff. The HTA has been criticized in the past. There has been a perception that the actual contractors are driving the process, which has caused the HTA to adjust their marketing plans, but that is not true. They have a strong marketing plan and guide each market with the best approach. They implement what they are working on, and adjustments will be made in the market. This can also be negotiated.

Mr. Choy said the timeline is good. He asked if they could move it up to May so they know the budget in April and then get the decisions made earlier. Mr. Nāho'opi'i said if the Board approves the finance side earlier, they can adjust it. Mr. Choy said he is trying to move the contract he is working on and is already looking at the plans for the next budget year. He suggested moving everything up by a month. Mr. Nāho'opi'i said if they expect the Budget

Committee to finalize everything earlier, they can also push the timing closer. He said some contracting needs to happen, and some of the markets are renewing their contracts. There may be some adjustments on specific markets, but they can generally move it up a little. In marketing, they are trying to increase the number of visitors who see their messaging that Hawai'i is strong in the natural, cultural, scenic resources and regenerative tourism and that they are a business and meetings kind of destination. They are trying to grow the number of people who see their website and social media posts. In essence, they are trying to increase the number of visitors who understand Hawai'i as a travel destination, the number of visitors who consider returning to visit Hawai'i, and the number of visitors who use the website for information. From the research, they have seen that it drives the intention to visit Hawai'i. This is a long-term plan for all of the HTA and not just part of marketing. They want to increase spending per person per day.

He spoke about strategy. This ensures that money flows into Hawai'i and businesses flow into Hawai'i, ensuring there are enough events meeting events, and that they are filling the HCC.

He spoke about the SWOT analysis. They identified from research that their strength towards the outside potential visitors. The multi-ethnic culture and natural beauty always sell well, and they do a good job of providing scenic beauty.

Although they have a strong brand strength of a quality vacation destination, there are some concerns. Their tracking has shown that awareness of Hawai'i as a travel destination compared to some other destinations is slowly falling behind in specific markets. They still have a good reputation for cuisine, which is also a driver of intention to visit and safety, particularly in the Asian market. However, they still face exchange rate issues compared to the strong U.S. dollar. The U.S. and Canada markets still have the perception that Maui is not ready for travelers. That is still a weakness for them. The Lahaina area needs to be rebuilt. They still have some issues related to the difficulty between resident sentiment and industry wanting to do certain things. They are also addressing a lack of new experiences and traffic congestion hotspots.

In terms of opportunities for amateur sports and sports overall, there has been a big push at the federal level and globally to utilize sports events as drivers for travel to Hawai'i. They can do a lot more in terms of product development. They are investing in that through the regenerative tourism components and the Community Tourism Collaborative to develop new products in technology. They have been working closely with some of the leaders in the AI area in tourism, trying to understand how that works and see where that will be applied to both marketing and managing their own efforts on the website.

To drive the higher spending visitors, they must continue to develop special curated, exclusive experiences that have higher demand and cannot be found in other places so that they can increase the price and bring a specific clientele. They are considering diversifying their source markets if funds are available to help lower risk and start to develop. As markets start to mature, they need to build up growing markets to ensure a steady flow of visitors and airseats. There is still the opportunity to increase off-peak demand so that there are constant visitors, resulting in constant work for their employees.

Some of the threats include the closing of businesses in Maui or those that are on the brink of closing because of the fires. They are also still recovering from losses of businesses closing during COVID. There are not as many activities, restaurants, etc., so they will have to build back a new product. They still have an issue with population exodus, which results in insufficient workers to staff their programs, hotels, etc. Other things include negative media coverage both in traditional and social media, which takes a lot of effort to address. They are constantly working on that, which takes resources away from their regular marketing efforts. The GMTs have told them there is intensified competition from other destinations, particularly because of the dollar.

To wrap it up with what they saw in the market. For Maui, they still have to work in the U.S. and Canada. It is not where it was before, but it is improving. International markets have not recovered. Japan is 45% to 50% of where it should be. They are doing well in Korea, but it is not as good as the previous year. There are some positives - increasing demand across all markets and types of demographic segments for sustainable, regenerative, and experiential travel, which is what they specialize in. As long as they continue to build new products in that area and work with wholesalers and travel agents to create new programs and products that feature their local businesses that offer that, they can draw the kind of visage they want. On the negative, there is intense competition. They are also seeing a shift in travelers' preferences for more exclusivity, which is good. If they can master that area by offering those exclusive options, they can ask for a higher price point, which will help them increase the spending per trip per person. They will have to ensure they are authentic and have quality experiences. That is what the curator program is for. Visitors can check and read comments and reviews from others.

Strategy:

- Stabilizing the travel for U.S. And Canada to Maui over the next year.
- Revitalizing higher spending visitors - Europe, Oceania, Korea, and China.
- They must also maintain Japan for the volume of visitors. It is their first international market in terms of number of visitors. They have the networks and the systems in place to ramp up very quickly, so they just need to maintain that even though the spending per person per day is lower, the total volume makes up for it. And they also do diverse

spending.

- Building new markets for Taiwan. If they are given enough resources to do so, that would be the next market they would look at.
- Strengthen brand recognition. Make sure it's a premier leisure and business destination. Continuing to do the marketing that the GMTs are instructed to do.
- Increase the person's expenditures through more immersive experiences. Doing more activities and having higher quality product establishments. Increasing more activities will result in more spending.
- Continue to differentiate – multi-ethnic experiences with the various festivals. Stewardship opportunities. All the various sustainability activities.
- Attract the affluent travelers and ensure MCI has the high sector, targeting those sectors like medical, technology, ocean sciences, etc. That aligns with their strengths.
- Romance has always been good. They do many activities, stay longer, and do multi-island travel. They are trying to emphasize multi-island visitation, which will increase spending in Hawai'i.
- Active travelers also try participating in and doing as many activities as possible, such as shopping, eating, etc.

He spoke about examples of the KPIs to which they hold themselves and their GMTs accountable. He also spoke about increasing total visitor expenditure. At a later stage, they will determine where they want to increase, etc. What was asked in the past for the high-value travel segment is if they are tracking the specific demographics that will result in high-value, high-spending travelers. They will build out additional tracking to see that their assumptions work.

The higher household incomes can afford to spend more. They will track the higher household incomes to see if they are increasing their reach to those areas. This means adjusting some of their research and availability of resources to track those.

Enhanced visitor satisfaction. They need to meet the expectations, which will result in more visits.

Responsible travel - the GMTs and other programs they are doing for destination stewardship are to increase awareness of safe and responsible travel so that visitors know what to expect. That will be one of the messaging types of KPIs that they will ensure the GMTs track.

Media engagement with website traffic is also important. Each one will depend on the specific market. Not all markets use the website as a strong tool. Some are more of a base but not as a marketing tool. It will adjust depending on the market.

They still want to track multi-island visiting. It helps spending and distribution on each island, particularly in some of the smaller communities. It also increases spending in Hawai'i by utilizing local airlines, other resources, and services.

Chair Pfund thanked Mr. Nāho'opi'i for the presentation.

Dr. Salā spoke about sports being encouraged at the national level. At the federal level, that will be expedited. They are looking to incentivize not just the big cities but small cities and towns throughout America. He would like to see more of that from a strategic perspective. He mentioned the big volleyball tournament at the HCC and how it went so well. Local businesses profit from the additional visitors that come with sports events. Another area that should not be excluded is the presence of the military in Hawai'i. The two major pillars that hold up the economy are tourism and defense. He said it is an untapped market. All the islands have a defense component that could lend itself to having meetings and conferences held in Honolulu and throughout the neighbor islands. He said they should try to weave that into their thinking when discussing strengthening the economy in these times and going after the objectives. He said the East-West Center is the host of many meetings that come with high-level diplomats and the like. When they come, they travel with an entourage. He said defense tourism should be part of the strategy going forward.

Mr. Nāho'opi'i said at the next Board meeting, they will discuss sport with the newly hired sports brand manager. This will make a big impact in the future. For 2026, they can put more emphasis on the sports area.

Dr. Salā said the Okinawa festival is an opportunity to build on. Relationships have been solidified as a result of FestPAC, and they are all looking to return to Hawai'i.

Ms. Paulson said she is concerned about the Canada market, especially for Maui, canceling their flights because of what is going on from a federal perspective. She asked if that was on the radar and if there were any special plans because the Canadian visitors were impactful for Maui numbers.

Mr. Nāho'opi'i said they have been monitoring this and working closely with Canada. They are hearing that the effects of Canadians not wanting to travel to the U.S. are generally due to various policies, etc. That sentiment does not carry as strongly to Hawai'i. They look at Hawai'i as an independent country, but more in alignment with some of their beliefs, feelings, and political beliefs are very more in line than the people of Hawai'i. HTC has monitored it carefully to see if there is going to be a drop in media use on the continent. They are going to swoop in and see if they can then convince those to do it in Hawai'i, special offers, etc., to take

advantage of this. There is some falloff, but they are on it and monitoring it daily. They keep in touch with Ms. Chun.

Mr. Arakawa agreed with Mr. Hannemann on the sports angle. He noticed that the SWOT analysis on opportunities talked about amateur sports only.

Mr. Nāho'opi'i said the opportunity is about what else they can do. They are already working on professional sports. In addition, they have not done as much on amateur sports, which is a new opportunity they can continue to work on. The SWOT analysis is about newer ideas that they can take advantage of. In their main strategy, they have a sports strategy in general, but these are additional things they can work on. Mr. Arakawa asked Chair Pfund to look at that because he was shocked that it did not have pro sports because they could do more. Chair Pfund said that was great input.

Mr. Arakawa said that on the multi-team thing concerning amateur sports, he understood that they assisted and spent some of their money to assist with a game. He said when they look at amateur sports opportunities, they should look at broader opportunities. He also suggested looking at the education market. Students travel, and it is an opportunity for the HTA to work on that. Some of the Japanese tour companies are looking at that particular market. He mentioned FestPAC and said Chair Hanneman was the tallest adopted Okinawan at the festival. This needs to be done in Hawai'i as well.

The committee member entered the Executive Session at 2:23 p.m.

6. Presentation, Discussion and/or Approval on the Plans for 2025 U.S. Market Saturation Activations ***

The committee members returned from the Executive Session at 3:28 p.m.

Ms. Anderson reported that the HTA staff recommended the Branding Standing Committee recommending to the Board \$6.3 million to HTUSA for California market activation in 2025, consistent with the Governor's intent to address the Maui Recovery and the California downturn, subject to the Budget, Finance, Convention Center standing committee's approval. Chair Pfund reported that the committee members unanimously voted in the executive session.

7. Presentation, Discussion, and/or Approval on Proposed Booth Improvements for the Worldwide Exhibition for Incentive Travel, Meetings, and Events (IMEX) Tradeshow

Chair Pfund announced that agenda items 7 and 8 are deferred to the next meeting.

8. Presentation and/or Discussion Regarding an Update on the Meetings, Conventions and Incentives Market Activity and Pace Report, and Hawai'i Convention Center Activity and Local Sales with Meet Hawai'i

9. Adjournment

The meeting adjourned at 3:31 p.m.

Respectfully submitted,



Sheillane Reyes
Recorder

5
Staff Report
Update on the U.S. Maui Emergency
Marketing Campaign



STAFF REPORT TO THE BOARD

March 13, 2025

REQUEST: To provide an update on the U.S. Maui Emergency Marketing Campaign.

FACTS:

1. February 27, 2025: Hawaii Tourism Authority’s (HTA) Board of Directors approved \$6.3 million for HTUSA to develop and implement a U.S. Maui Emergency Marketing Campaign that is in alignment with the Governor’s intent to address Maui’s recovery as follows:

Component	Budget Allocation
1. Wholesaler Program	\$4,000,000
2. Other Direct Booking Programs	\$500,000
3. Brand Efforts for Maui Recovery	\$800,000
4. Admin Fee + Brand Study	\$1,000,000
Total	\$6,300,000

2. February 27, 2025: HTUSA was directed to submit a revised proposal with a budget allocation in alignment with the HTA board motion. The proposal would then be provided to the DBEDT Director for Governor’s approval.
3. March 1, 2025: Interim President & CEO, Daniel Nahoopii, submitted the revised proposal to DBEDT Director Jimmy Tokioka. March 5, a revised version with more details on the HVCB administrative activities was provided.
4. March 7, 2025: DBEDT Director Jimmy Tokioka advised Mr. Nahoopii to move ahead with drafting the contract.
5. March 12, 2025: As of March 12, 2025, program staff has submitted all internal documents and a draft contract to the procurement team.

BUDGET IMPLICATIONS: This project will be funded by \$6.3 million from the restricted funds released by Governor Green on January 31, 2025. Emergency Procurement is being used per Governor Green’s Emergency Proclamation No. 20 Relating to Wildfires.

RECOMMENDATION: No action needs to be taken.

6
Staff Report
2026 HTA Marketing Plan



STAFF REPORT TO THE BOARD

March 13, 2025

REQUEST: To review HTA's next phase of the 2026 Marketing Plan Development

FACTS:

Timeline – HTA will issue the 2026 marketing plan and Brand Marketing Plan (BMP) outline in May to the Global Marketing Team. We are currently working through the process and some of the data that we've collected that hasn't been presented thus far. We are having additional discussions to refine the plan, and for next BSCM in April, we will be presenting a draft of the 2026 HTA marketing plan.

We will be reviewing additional information on the 2026 HTA Marketing Strategies. This packet includes additional information on the Marketing Strategies and a Brainstorming session that was completed during Spring Tourism Week. We have also included the target geographical markets for the plan, and 2025/(anticipated) 2026 budget allocations.

DISCUSSION: Refining the overall strategies and key objectives for 2026.

BUDGET IMPLICATIONS: N/A

RECOMMENDATION: For review and discussion.

March 13, 2025



Branding Standing Committee Meeting

Agenda #6

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

3.17.2025

2026 HTA Marketing Plan

Timeline & Approval Process

- 1. February:** Prepare 2026 Marketing Plan
 - Present Logic Model, Timeline, Strategies to BSCM; Receive Input **Completed**
- 2. March:**
 - Spring Tourism Update Week – GMT Brainstorm/Collective Feedback **Completed 3/6, updating today**
 - BSCM – Updated draft of 2026 Marketing Plan Strategies; Receive Input **Updated today**
- 3. April:** BSCM and Board - Present updated 2026 Marketing Plan; Receive approval
- 4. May:** Issue 2026 Marketing Plan & Brand Marketing Plan (BMP) Outline to GMT's
- 5. June:** Board approves final FY26 budget
- 6. July:** Receive BMPs from GMT
 - Internal review and feedback
- 7. August:** Receive Final BMPs
 - Present BMPs to BSCM; Receive approval
- 8. September:** Publish Partnership Opportunities and Present BMPs at 2025 Annual HTA Conference

2026 HTA Marketing Plan

Executive Summary

This Destination Marketing Plan outlines Hawai‘i’s strategic approach to targeting high-value, mindful travelers while supporting economic sustainability and community preservation. By leveraging data-driven marketing, exclusive partnerships, and regenerative tourism principles, Hawai‘i aims to increase visitor spending while managing visitor volume responsibly.

Target Markets

MMA	PPPD		PPPT		Total Expenditure	
	2019	2024P*	2019	2024P	2019	2024P*
USA	188.3	244.4	1,693.3	2,151.9	11,636.2	15,779.9
Japan	241.6	239.7	1,426.4	1,482.1	2,248.3	1,067.8
Canada	165.0	223.2	2,002.4	2,427.4	1,081.5	1,051.2
Oceania	261.7	299.6	2,462.1	2,628.0	895.1	541.4
Europe	150.6	215.7	1,943.9	2,828.2	268.1	257.7
Korea	285.2	318.1	2,173.7	2,655.0	497.9	411.3
China	329.0	355.3	2,636.6	2,574.0	242.8	40.5
Global MCI	233.6	(2023 data) 295.2	1,691.0	(2023 data) 2,266.8	904.7	(2023 data) 1,041.5
Cruise	87.3	110.8	406.7	516.4	58.4	86.8

* Global MCI 2024 data is released in August 2025

Market Budget Allocation

MMA	CY2025 (actual with 10% reduction)	CY 2026 (anticipated)
USA	\$15,052,001	\$17,798,333
Japan	\$5,850,000	\$7,261,111
Canada	\$900,000	\$1,000,000
Oceania	\$1,000,000	\$1,000,000
Europe	\$900,000	\$1,000,000
Korea	\$864,636	\$810,000
China	\$362,784	\$555,556
Global MCI	6,008,985	7,281,683
Cruise	80,100	111,111

Market Analysis

- **Maui Recovery of U.S.A. and Canada**
- **International Markets Not Recovered**
- **Increased Demand** for sustainable, regenerative, and experiential travel
- **Intensified Competition** from emerging destinations that promote cultural and eco-tourism
- **Shifting Traveler Preferences** for exclusivity, authenticity, and sustainability

Strategies

- **Stabilize travel from U.S.A and Canada to Maui**
- **Revitalize higher-spending international markets: Europe, Oceania, Korea, China**
- **Maintain Japan for volume and diverse spending (retail, activities)**
- **Diversify Source Markets - Taiwan**
- **Strengthen brand recognition** - As a premier leisure and business destination.
- **Increase per-person expenditure** - By emphasizing more experiences.
- **Differentiate Hawai'i** - Through Native Hawaiian cultural values, multi-ethnic experiences, and stewardship opportunities.

Target Audiences

- **Affluent Travelers** - High net worth individuals
 - Seeking exclusive experiences
- **Cultural Enthusiasts** interested in:
 - Hawaiian heritage and
 - local engagement
- **Eco-Conscious Travelers** motivated by:
 - Sustainability
 - Responsible travel
 - Voluntourism
- **Meetings, Conventions & Incentives (MCI) Travelers** - High-value MCI sectors
- **Romance Travelers**– High-spending, multiple activities and islands
- **Active Travelers** – Willing to spend and participate in many activities and experiences

For Discussion from 2025

HTA BRAND MARKETING

OVERALL STRATEGIES & KEY OBJECTIVES

To ensure the Hawaiian Islands remain globally competitive, the HTA's 2025 brand marketing overall strategies are as follows:

- Target mindful and high-value travelers in specific major market areas
- Revitalize the higher-spending international markets
- Stabilize U.S. and Canada markets, particularly visitation to Maui
- Support recovery or growth of air seats from key markets
- Create brand messaging that delivers and communicates the following destination attributes that have been shown to strengthen Hawai'i's competitive advantage:
 - Hawai'i's People, Place and Culture
 - Sustainable Destination
 - Beautiful Scenery
 - Relaxation
 - New Things to Explore
 - Volunteer/Giveback Opportunities

For Discussion

(Continued)

- Deploy the most effective channels for paid and earned media
- Focus on digital/social content marketing
- Leverage local voice/ambassadors /influencers
- Inform, educate and motivate travel trade and media
- Seek out strategic partnerships to increase destination marketing capacity
- Support Hawai'i's progress towards regenerative tourism

For Discussion

(Continued)

The HTA's 2025 brand marketing key objectives are as follows:

- Brand marketing campaigns and programs shall be guided and informed by the Hawaiian values of aloha, mālama, ho'okipa and kuleana.
- Maintain the cultural integrity of the Hawaiian language, customs and practices, cultural and historic sites, and imagery in all brand marketing initiatives. Highlight the diversity of Hawai'i's people, place, and culture.
- Drive destination brand awareness. Manage the brand of the Hawaiian Islands as well as the specific brands of Kaua'i, O'ahu, Lāna'i, Moloka'i, Maui, and Hawai'i Island.
- Take advantage of market insights and intelligence on trends, distribution dynamics, consumer insights, and competitive analysis. Stay adaptable to changing market trends and continuously innovate to keep the brand relevant.
- Cultivate the next generation of mindful travelers.

For Discussion

(Continued)

- Increase per person expenditures and total spending in alignment with the HTA's KPIs.
- Educate visitors pre-arrival with specific information about safe and respectful/mindful travel. This should be coordinated with the HTA's Destination Stewardship Branch to provide a seamless message throughout the entire visitor journey.
- Develop airline relationships with the goal of monitoring and optimizing load factors and supporting routes as directed.
- Focus marketing and support tour product development to build a desire to visit during shoulder periods and encourage multi-island itineraries.
- Assist the HTA's Global MCI Contractor "Meet Hawai'i" in securing MCI group business with special focus on the state-owned Hawai'i Convention Center (HCC) and citywide convention growth.

For Discussion

(Continued)

- Emphasis should be to drive visitor spending into Hawai'i-based businesses and organizations as a means to support a healthy economy, in partnership with the HTA, DBEDT, the private sector, etc.
- Assist the HTA and other designated entities with crisis management and communication related to the visitors and/or visitor industry.
- At the HTA's direction, support Hawai'i-based projects, programs, and initiatives.
- Where necessary, engage local communities and/or stakeholders to ensure their support and participation.
- Ensure that initiatives are metrics-driven.