



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 **Updating 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. May/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	FY2025 (after 10% reduction)	FY 2026 (based on \$70 million budget)
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	\$810,000	\$900,000
China	\$362,784	\$555,556
Global MCI	\$6,008,986	\$6,506,384
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

Target Audiences

- **Affluent Travelers** - High net worth individuals
 - Seeking exclusive experiences
 - Mindful and/or high-value
- **Cultural Enthusiasts** interested in:
 - Hawaiian heritage and
 - Local engagement
 - Mindful
- **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 for 2026

OVERALL STRATEGIES

To ensure the Hawaiian Islands remain globally competitive, HTA's 2026 brand marketing overall strategies are as follows:

Brand Elevation & Storytelling:

- Strengthen Brand Recognition – As a premier leisure and business destination
- Differentiate Hawai'i - Through Native Hawaiian cultural values, multi-ethnic experiences and stewardship opportunities
- Purposeful Travel Through Connection - Responsible tourism, and regenerative experiences

Spending Impact:

- Target Mindful and High-Value Travelers - In targeted major market areas
- Increase Per Person Expenditures & Total Spending - In alignment with the HTA's KPIs.
- Diversify Spending Opportunities – Such as through sustaining Japan expenditures (retail, activities)
- Revitalize the higher-spending international markets: Europe, Oceania, Korea, China

Market Visitation:

- Stabilize U.S. and Canada Markets - Particularly visitation to Maui
- Support Recovery or Growth of Air Seats - From key markets
- Drive Multi-Island Visitation
- Diversify Future Source Markets – Taiwan

For Discussion for 2026

BRAND MESSAGING GUIDELINES

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 & Culture
- Sustainable Destination
- Beautiful Scenery
- New Things to Explore
- Volunteer and Giveback Opportunities



For Discussion for 2026

BRAND MARKETING GUIDELINES

Brand marketing campaigns and programs shall be guided and informed by the Hawaiian values of aloha, mālama, ho‘okipa and kuleana

Strengthen Brand Recognition

- Stay adaptable to changing **market trends** and **continuously innovate** to keep the **brand relevant**
- 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**
- Assist HTA and other designated entities with **crisis management** and **communication related to visitors** and/or the visitor industry.
- Promote HTA-funded **projects, programs, and initiatives**.
- Drive **visitor spending** into **Hawai‘i-based businesses** and **organizations** to support a **regenerative tourism model**

For Discussion

BRAND MARKETING GUIDELINES

(Continued)

Purposeful Travel Through Connection

- Highlight the ***diversity of Hawai'i's people, place, and culture***
- Support Hawai'i's progress ***towards regenerative tourism***
- Maintain the ***cultural integrity*** of the ***Hawaiian language, customs and practices, cultural and historic sites, and imagery*** in all brand marketing initiatives
- Cultivate the next generation of ***mindful travelers***
- Promote ***unique activities/attractions*** to see and do in Hawai'i
- Showcase Hawai'i's ***natural environment*** from mauka to makai
- ***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***.

For Discussion

BRAND MARKETING GUIDELINES

(Continued)

Market Visitation

- Develop **airline relationships** with the goal of **monitoring** and **optimizing load factors** and **supporting routes** as directed
- Build a desire to **visit during shoulder periods** and **encourage multi-island itineraries**
- **Diversify traveler base** to **appeal to large business** and **industry groups** by assisting 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**
- Promote major **festivals, events** and **sports**

All strategies must be data-driven with initiatives that are measurable.

For Discussion for 2026

TACTICS

Consumer Direct

- **Marketing** - Deploy the most effective channels for paid and earned media
- **Digital & Social Content Marketing** - Utilize targeted advertising, influencers, and premium travel platforms (e.g., Virtuoso, Conde Nast Traveler)
- **Consumer Events** – Japan Hawai'i Expo
- **High-End Promotions and Co-Branding (lifestyle)** - Develop new higher-value packages

Travel Trade & Airline Partnerships

- **Agent Training & FAM Trips** – Educate and incentivize travel trade/tour operators and trade media
- **Airline Collaboration** - Work with carriers to optimize load factors and support new routes and flights
- **Cooperative Marketing** - Joint campaigns with hotels, airlines, tour/cruise operators, wholesalers
- **Strategic Partnership Initiatives** – Seek new opportunities to increase destination marketing capacity
- **Brand Alignment of Product** – Encourage tour travel trade to develop product aligned with our brand strategy
- **Mission & Roadshows** – Engaging, high in attendance and provide up-to-date education opportunities

Public Relations & Media

- **The People** - Leverage local voices/ambassadors/influencers/celebrities
- **Targeted Media Campaigns** - Feature Hawai'i in affluent travel, business, and eco-conscious publications
- **Earned Media & Storytelling** - Leverage travel writers and influencers to showcase unique experiences
- **Pitching of Stories** - To targeted media
- **Group Media Fam & Individual Press Trips** - Educate media on unique experiences

Measure of Success For Branding & Marketing

- **Brand Health**

- Messaging:

- *Increase percentage for “visitors recall hearing or seeing information about safe and responsible travel prior to arrival” compared to the most recent study*
 - *Increase percentage for "visitors recall hearing or seeing information about caring for and respecting Hawai‘i’s culture, people, and environment prior to arrival" compared to the most recent study*
 - *Increase percentage for "visitors recall hearing or seeing information about ocean and hiking safety prior to arrival" compared to the most recent study*
 - *Increase percentage for "visitors recall hearing or seeing information about volunteer/giving back opportunities prior to arrival" compared to the most recent study*
 - *Increase percentage for "visitors recall hearing or seeing information about support local/shop local prior to arrival" compared to the most recent study*

- Destination Familiarity

- Destination Preference

- **Travel Consideration/Likelihood to Visit**

- **Average Daily Visitor Spending**

- **Total Visitor Expenditures**