



HAWAII TOURISM
AUTHORITY

STRATEGIC
PLAN
2020-2025

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This is the Hawai'i Tourism Authority's (HTA's) fifth strategic plan or update, with the most recent previous version approved for 2016-20.

ON THE COVER:

A place where everything has a name and a purpose. Each existing in its own wholeness. Skilled ancestors with a profound understanding of nature and each other remind us, with every cool breeze that caresses us, to tread down the path they laid for us. So as we set out on the next five years of our work we ask, "*na wai ho'i ka 'ole o ke akamai, he alanui i ma'a i ka hele 'ia e o'u mau mākuu?*" Why shouldn't I know, when it is a road often traveled by my parents?





Foreword

Since our creation in 1998, the Hawai'i Tourism Authority has been guided by strategic plans that reflected their times. With HTA now in our third decade, this plan responds to new levels of tourism shaped by new technologies with new opportunities and new challenges.

What remains unchanged is HTA's mission: "To strategically manage Hawai'i tourism in a sustainable manner consistent with economic goals, cultural values, preservation of natural resources, community desires, and visitor industry needs." This plan represents our recommitment to that mission and, significantly, shifts more emphasis to address tourism's impacts. This shift recognizes the need for tourism to provide both a quality visitor experience and enhanced quality of life for Hawai'i residents, which, taken together, are the necessary ingredients for long-term success.

The mission is our *kuleana*, but it is not ours alone. This plan incorporates dialogue and input from the many stakeholders who are responsible for or affected by tourism in Hawai'i. Working together with the many government agencies, organizations, and individuals who are passionate about these islands, we are confident that tourism can continue to provide benefits far into the future.



STRATEGIC PLAN OVERVIEW

HTA'S EVOLVING SET OF PURPOSES

Act 156, SLH 1998 created the Hawai'i Tourism Authority. The law specifies a number of purposes and mandates, including:

- **STRATEGIC PLANNING.** This is a plan for HTA's own actions through 2025 – reflecting our legal powers, constraints, budget, and planning framework. Tourism will also be affected by many other private and public organizations that we cannot directly control, but the plan suggests ways we can coordinate and partner with these stakeholders.
- **HAWAIIAN CULTURE.** The law requires us to perpetuate the uniqueness of the Native Hawaiian culture and community in the visitor industry experience.
- **MARKETING & BRAND MANAGEMENT.** This has traditionally been HTA's primary focus and will continue to be an area of emphasis.

The law also encourages HTA to develop programs that attract visitors, improve life for residents, and heed both resident and visitor concerns over unintended tourism impacts.

As visitor numbers have grown more rapidly than visitor spending and as resident support for tourism has weakened in recent years, we have increased our focus on what is now commonly called **destination management**. This is the first strategic plan developed while HTA is re-balancing our attention from mainly marketing to greater emphasis on destination management.

Much of our new emphasis involves more time and funding to support Hawaiian culture, community and multicultural programs, and natural resources – as well as efforts to educate visitors about safety and responsible travel.

HTA is also legally empowered “to monitor, investigate, and respond to complaints about [tourism-related] problems ...”¹ We have historically responded to concerns about community impacts on an informal basis. Going forward, this plan calls for a more systematic approach when invited by legislators and supported by affected communities.

STRATEGIC DIRECTIONS & ACCOUNTABILITY

HTA has been reorganized around four interacting “Pillars” supported by research and other administrative functions. This plan establishes a general goal for each Pillar.



NATURAL RESOURCES

Respect for Our Natural & Cultural Resources

Dedicate resources to programs that enhance and support Hawai‘i’s natural resources and cultural sites to improve the quality of life for all of Hawai‘i’s residents and to enhance the visitor experience.

HAWAIIAN CULTURE

Support Native Hawaiian Culture & Community

Ho‘oulu (grow) the uniqueness and integrity of the Native Hawaiian culture and community through genuine experiences for both visitors and residents.

COMMUNITY

Ensure Tourism & Communities Enrich Each Other

Work to make sure residents and local communities benefit from tourism by supporting programs valued by the community and aligned with the destination’s brand and image; informing both residents and visitors of these programs and events; strengthening relations between residents and visitors; and forming partnerships to build a resilient tourism workforce and community.

BRAND MARKETING

Strengthen Tourism’s Contributions

Take the lead in protecting and enhancing Hawai‘i’s globally competitive brand in a way that is coordinated, authentic, and market-appropriate; is focused on Hawai‘i’s unique cultures, diverse communities, and natural environment; and supports Hawai‘i’s economy.

Under the goal for each Pillar, this plan establishes several objectives and specific milestones or measures for tracking success.

The Pillars are intended to support an integrated destination management system, with four overall Key Performance Indicators (KPIs), representing the most important ways HTA will be accountable to our stakeholders:

- Resident Satisfaction
- Average Daily Visitor Spending
- Visitor Satisfaction
- Total Visitor Spending

¹Hawai‘i Revised Statutes (HRS) §201B-3(a)(23)



1

INTRODUCTION

Hawai'i tourism is at a point that requires a re-balancing of priorities. The continuous drive to increase visitor numbers has taken its toll on our natural environment and people, the very reason visitors travel to our islands.

For this reason, **destination management** has become a major HTA focus and is at the heart of this 2020-2025 Strategic Plan Update.

Our previous strategic plans have included attention to community benefits, Hawaiian culture, workforce training, and other destination concerns. What is different now is the greater emphasis and additional resources being directed to them.

At the same time, HTA is enabled by law² to “Have a permanent, strong focus on Hawai'i brand management”, primarily **marketing**. However, marketing can only do so much if we neglect the very resources that draw visitors to Hawai'i – our *'āina*, our culture, our communities. By reinvesting in them, we strengthen the destination and better position ourselves to endure economic downturns.

1.1 NATURE AND FORMATION OF THIS STRATEGIC PLAN

As noted in previous strategic plans, this update is envisioned to be the guiding document for HTA to carry out its legal mandate over the next five years.

² HRS 201B-3(15)



Worldwide Perspective: “The good news is that tourism is growing, creating jobs and economic activity. The challenge is that this growth can put pressure on destinations.”

(World Travel & Tourism Council, McKinsey & Company, “Coping with Success: Managing Overcrowding in Tourism Destinations,” Dec. 2017)

The process for developing this plan began in June 2019 with stakeholder workshops on every island to discuss our new emphasis on destination management.

HTA staff then developed initial draft goals, objectives, and strategic choices for review and revision by the HTA Board’s Strategic Plan Investigative Committee. This next version was reviewed by about 50 community, industry, and government stakeholders statewide. Their comments resulted in further review by staff and the Board’s Committee, resulting in the final “Strategic Plan Core Contents” contained in Section 3 – the heart of the new plan.

HTA is investigating various tools to help measure progress on these issues, such as Aloha+ Challenge, annual Resident Sentiment surveys, and destination assessments.

1.2 RELATIONSHIP OF THE STRATEGIC PLAN TO THE STATE PLANNING ACT

The Hawai’i State Planning Act (HRS §226) of 1978 contains economic, social, and land-use objectives and policies, including broad policy guidelines to promote the economic health and quality of the visitor industry (HRS §226-103). The language in §226 relating to the “visitor industry” has been only lightly amended over the past 40 years.

Every State agency is charged with carrying out the policies in the State Planning Act. As such, the State Planning Act plays the role of a “State Plan,” and HTA understands and accepts our responsibility to ensure that our plans comply through implementation of our own strategic plan.

Figure 1 illustrates the alignment of the State Planning Act to HTA plans and reports.

HTA strategic plans present goals, guiding principles, strategic choices, objectives, evaluation measurement criteria, and programmatic actions as guides for allocating HTA resources and efforts.

Using the Tourism Strategic Plan as a foundation, HTA’s annual operating plan (included in the “Tourism Marketing Plan” in Figure 1), organizes HTA for success. Additional short-term specific actions may be added in each “Marketing Plan.”

HTA accounts for our activities via our *Annual Report to the Hawai’i State Legislature*. The report reviews HTA expenditures and programs for the calendar year, including evaluations based on success measures in both the HTA Tourism Strategic Plan and the Tourism Marketing Plan.

RELATIONSHIP TO THE STATE’S ACHIEVEMENT OF THE UNITED NATIONS SUSTAINABLE DEVELOPMENT GOALS

HTA supports the United Nations 17 Sustainable Development Goals (SDGs), and the UN 2030 Agenda for Sustainable Development. HTA will promote visitor industry alignment with the Aloha+ Challenge, Hawai’i’s recognized framework to achieve the UN SDGs, especially for energy, local food production and consumption, and water:

- Aloha+ Clean Energy Transformation: Business Sector energy efficiency
- Aloha+ Local Food Production and Consumption: Local food production and consumption
- Aloha+ Natural Resource Management: Watershed forest area and native species



Figure 1: HTA Plans & Reports







OUR MISSION

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

OUR VISION

By 2025, tourism in Hawai'i will:

Ho'oulu (Grow) the uniqueness and integrity of the Native Hawaiian culture and community;

Provide a unique, memorable, and enriching visitor experience;

Generate clear community benefits and responsibly manage tourism-related impacts and issues;

Support a vital and sustainable economy.



2 HAWAI'I TOURISM SITUATION ANALYSIS

The situation facing HTA, the visitor industry, and Hawai'i's communities has changed significantly since the 2016 HTA Strategic Plan was adopted.

OVERALL TRENDS

Visitor arrivals have set records each year since the 2016 plan, and the state is poised to reach the 10-million-annual-visitors milestone in 2019. While arrivals have been the traditional measure for tourism success, the “successful” increase in visitor numbers has created pressure on residential areas and visitor sites, threatening Hawai'i's quality of life and the visitor experience.

TOURISM FORECAST

The United Nations World Tourism Organization (UNWTO) reported that 2018 global tourism arrivals totaled 1.4 billion (+5.4% over 2017), with receipts reaching \$1.45 trillion (+4.4%). UNWTO forecasts global tourism arrivals to continue to increase at about 3% annually.

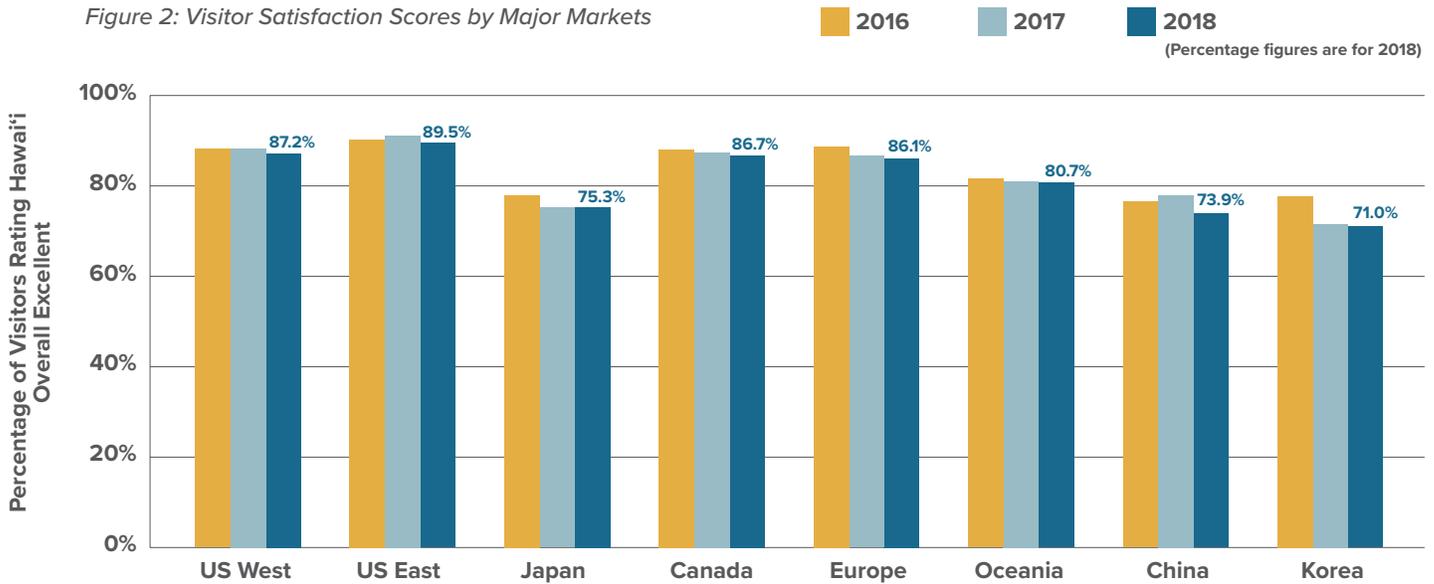
The State Department of Business, Economic Development, and Tourism (DBEDT) forecasts that Hawai'i's visitor census (the number of visitors in the state on an average day) will increase to about 253,500 by 2025 and then continue growing by about 1% annually. For the first time, DBEDT also forecasts real daily spending to continue to decline in the future.

HAWAI'I'S STRONG BRAND

The Hawai'i brand remains strong and competitive, and it has been a source for growth since the last HTA strategic plan.

A strong commitment from Hawai'i's airline partners has resulted in a consistent increase in air seats to the state over the last nine years.

Figure 2: Visitor Satisfaction Scores by Major Markets



Hotels in Hawai'i enjoy some of the strongest performance results in the U.S. Hotel occupancy, revenue per available room, and average daily rates have all been strong, at least partially offsetting high operating costs in Hawai'i.

Along with the strength of Hawai'i's brand, high visitor satisfaction has also been a key reason for tourism growth. Roughly 90% of visitors from the U.S. and Canada rate their Hawai'i vacation experience "excellent" overall. About three-quarters of visitors from Japan rate their experience excellent. In surveys measuring perceptions of prospective visitors to Hawai'i, our islands have a very favorable image overall. Hawai'i also rates highly for important considerations such as safety, authenticity, and uniqueness.

However, visitors find Hawai'i's value for the money to be a weak point, suggesting the need to continue to focus on creating and communicating high-quality experiences that justify Hawai'i's generally higher prices.

ECONOMIC CONTRIBUTIONS

While Hawai'i's strong brand has been driving record numbers of visitors, tourism's percentage of Hawai'i's GDP has declined. Tourism now accounts for about 17% of the state's gross domestic product (GDP) compared to about 25% two decades ago.

In eight of the last nine years, the average number of visitors in the state (the visitor census) has grown significantly faster than the rate of visitor daily spending. Inflation-adjusted visitor spending (per-person per-day) and total spending have both generally declined since mid-year 2018.

CHANGES IN VISITOR BEHAVIOR

Social media, global positioning technology, apps, peer review sites, and other advancements in technology provide visitors with much more control over their Hawai'i experience than ever before. Places that were once unknown to visitors are now often a challenge to manage. Many of these sites are culturally sensitive, on private land, or pose dangers to visitors.

Booking websites enable visitors to seek out lower-cost accommodations, including vacation rentals, many of which have been operating illegally. In 2018, about 1.3 million visitors stayed in bed and breakfasts, vacation rentals, or in shared accommodations.

Two-thirds of all visitors to the state are now repeat visitors. For the U.S. West, Hawai'i's most developed market, repeat visitors are 81% of arrivals. Repeat visitors often have different spending patterns than first timers. For example, they are less likely to stay in full-service hotels or visit commercial attractions.

Some higher-spending visitor segments (bridal/honeymoon, golf, meetings, and others) have declined as a percentage of total arrivals or stagnated since the last strategic plan.

RESIDENT SUPPORT FOR TOURISM

In 2018, there were nearly 243,000 visitors in the state on an average day, or about 14% of the total number of people present. In visitor-heavy Maui and Kaua'i counties, almost 30% of the people on island were visitors on an average day.

FIGURE 2: INSIGHTS

High visitor satisfaction has been a key reason for tourism growth. Roughly 90% of visitors from the U.S. and Canada rate their Hawai'i vacation experience as "excellent".

Figure 3: Resident Sentiment:
 “Tourism has brought more benefits than problems”

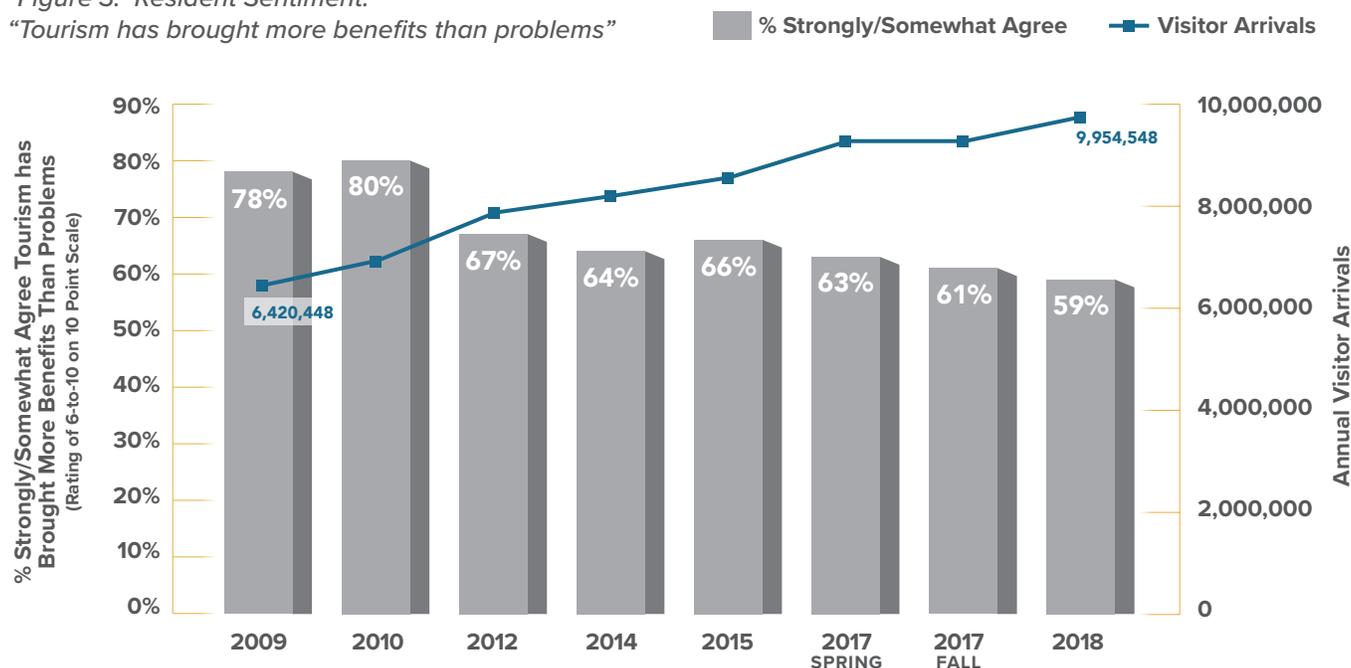


FIGURE 3: INSIGHTS

As visitor arrivals have increased greatly since 2009, some measures of resident satisfaction have fallen.

Using new technologies, large numbers of these visitors are now going to sites that do not have the capacity to handle large crowds. The result has affected the experience of both visitors and residents, as traffic congestion and crowds change the character of popular sites and neighborhoods.

The increasing pressure caused by growth coincides with reduced resident support for tourism. HTA’s resident sentiment surveys show the percentage of residents who feel that “tourism provides more benefits than problems” has declined from about 80% in 2010 to about 59% in 2018.

Statistical analysis of data in HTA’s resident surveys indicates that having a voice in tourism development, presenting Native Hawaiian culture authentically, and preserving Native Hawaiian culture are the keys to improving resident sentiment. Support for tourism is weakest on the Neighbor Islands, especially Maui and Kaua’i counties, where tourism is increasingly blamed for traffic congestion.

TOURISM IMPACTS AND DESTINATION MANAGEMENT

Community concerns about tourism have appeared in numerous local articles about “over-tourism,” highlighting overcrowding, traffic congestion, deteriorating conditions at parks and trails, and visitor encroachment in Hawai’i neighborhoods.

Hawai’i is not alone in dealing with the impacts of tourism growth. Tourism management plans have been developed in many destinations around the world to respond to growing concerns about tourism impacts. Tourism centers like Amsterdam, Barcelona, Rome, and Venice – as well as U.S. destinations such as Breckenridge in Colorado and the Columbia River Gorge in Oregon – have taken steps to control the effects of high-volume tourism.

EMERGING TECHNOLOGIES

While technology has contributed to many of the negative issues related to visitor spending and visitor crowding, emerging technologies may also provide new tools for tourism management. Virtual and augmented reality, “big data,” advances in data analytics, 5G (the next generation of wireless), and other new technologies potentially enable destinations to more precisely target higher-spending visitors. They can also contribute to the management of visitor flows and safety.

ACCOMMODATIONS

The growth in arrivals over the past 10 years has primarily been driven by visitors staying in vacation rentals and other non-traditional accommodations, many of which were operating illegally, without a permit. While visitor arrivals have grown 53% since 2009, the number of accommodations traditionally

Figure 4: Growth in Visitor Arrivals Compared to Growth in Traditional Accommodations



Source: Hawai'i Tourism Authority *Note: Traditional units include condo hotel and timeshare units

located in resort areas (hotels, timeshare units, and condo hotels) declined by slightly less than 1%.

Hawai'i's counties have begun to implement stricter controls on illegal short-term vacation rentals following years of unregulated activity. Enforcement of limits will take many accommodation units off the market. While these changes respond to resident concerns about the encroachment of tourism into residential neighborhoods, stricter regulation may also affect the total number of visitors and the number of air seats to the state.

Hoteliers have invested in programs to expand, refresh, and diversify many hotel properties. Office buildings have been "re-purposed" as hotels; older properties have been refurbished; and small properties have been upgraded as "boutique" hotels. While much of Hawai'i's hotel infrastructure is aging, these new initiatives are helping to keep Hawai'i competitive with other destinations.

IMPROVEMENTS IN MEETINGS MANAGEMENT

A recent change in the law allows marketing for both large meetings (those using multiple hotels or the convention center) and also smaller hotel-based meetings to be managed by the same contractor. HTA has conducted a search for a single organization to handle all of these aspects of marketing for meetings.

The reorganized marketing effort will be better aligned with customer needs and is expected to improve the development of the higher-spending meetings market.

INITIAL TOURISM MANAGEMENT INITIATIVES

Recognizing the increasing impact of high-volume tourism on attractions, sites, and residential neighborhoods, HTA has begun rebalancing our budgets to provide additional support for Hawaiian culture, community activities, and visitor safety. HTA's fiscal 2020 budget increased spending for Hawaiian culture, natural resources, and community programs by \$7.5 million compared to the previous year's budget.

In order to respond to issues at specific sites that are managed by other agencies, HTA is collaborating with and providing funding for other agencies' efforts to respond to tourism concerns at sites identified by elected officials and supported by the community.

POTENTIAL THREATS

Tourism is often described as a fragile industry easily affected by weather or other events and crises, economic downturns, terrorism, and adverse publicity, beach erosion, or other unforeseen events. The Kīlauea volcano eruption on Hawai'i Island and the record rains on Kaua'i in 2018 are

FIGURE 4: INSIGHTS

The 53% growth in arrivals from 2009 to 2018 has been largely driven by visitors staying in vacation rentals and other non-traditional accommodations.

Figure 5: HTA Spending Categories

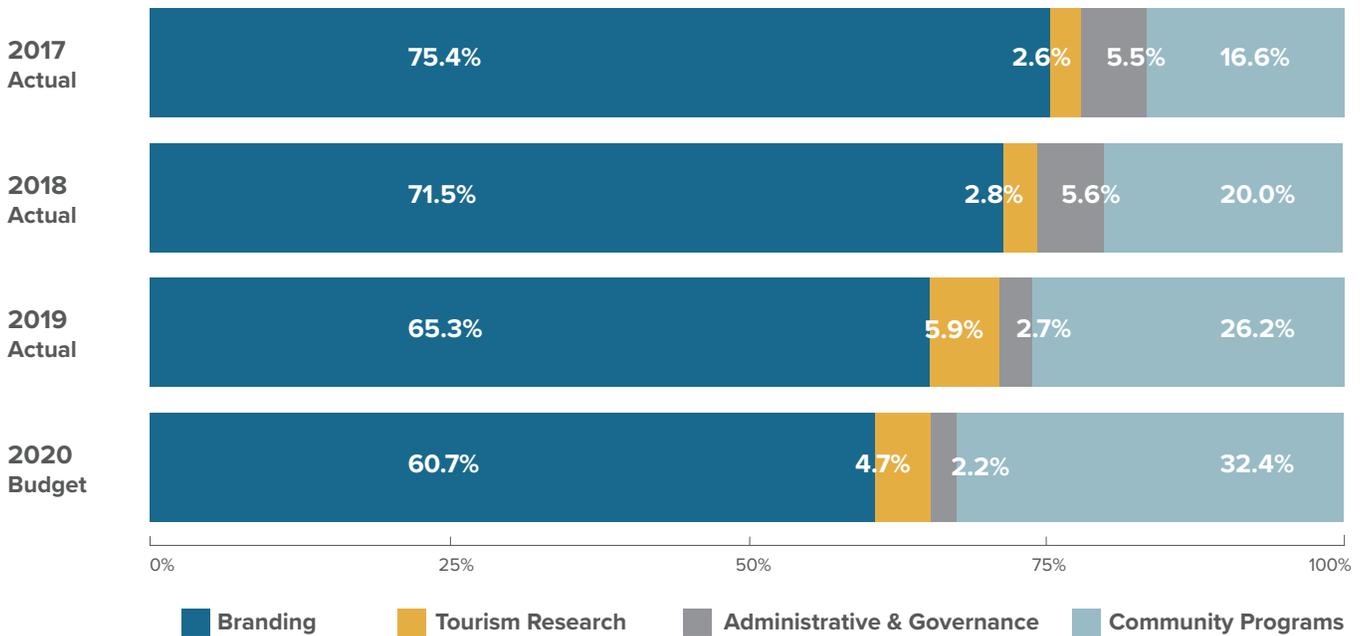


FIGURE 5: INSIGHTS

Hawai'i Tourism Authority has begun rebalancing budgets to provide additional support for Hawaiian culture, natural resources, community activities, and visitor safety.

two recent examples of events that have impacted tourism.

International markets are especially sensitive to changes in currency values and political uncertainties. For 2019, arrivals from Oceania (Australia and New Zealand) were down almost 13% while what HTA calls “Other Asia” (China, Korea, Taiwan, Singapore, and Hong Kong) were down by 6.5%, with the China market alone experiencing a 24% decline.

In preparation for future disasters, HTA has increased the resources we devote to safety and security, and we have established a close working relationship with the Hawai'i Emergency Management Agency (HI-EMA) to improve our ability to respond to potential future natural disasters and improve visitor safety.

Along with catastrophic threats like hurricanes and tsunamis, the Hawaiian Islands are vulnerable to global challenges like climate change and sea-level rise. HTA's relationship with HI-EMA and other state planning agencies provides an important link to ensure tourism considerations are included in response plans.

The U.S. economy has experienced a record expansion since the 2008 economic crisis. The expansion will inevitably end, and a recession is always a possibility, though forecasting economic downturns is not a science. While currently there is no real downturn, the growth in nominal visitor

spending in Hawai'i slowed to 1.4% in 2019 compared to 5.1% in 2018.

With the potential disruptions that can be caused by unforeseen events, HTA programs and contracts are designed to allow shifts in budgets and programs to respond to changing circumstances.

AMOUNT, SOURCE, AND USES OF FUNDS FOR HTA

HTA operates with a fixed budget set by the State Legislature with funds from the Transient Accommodations Tax (TAT). The amount of TAT revenues provided to HTA's Tourism Special Fund was capped in Fiscal Year (FY) 2014, and the cap was set at \$79 million in FY 2019.

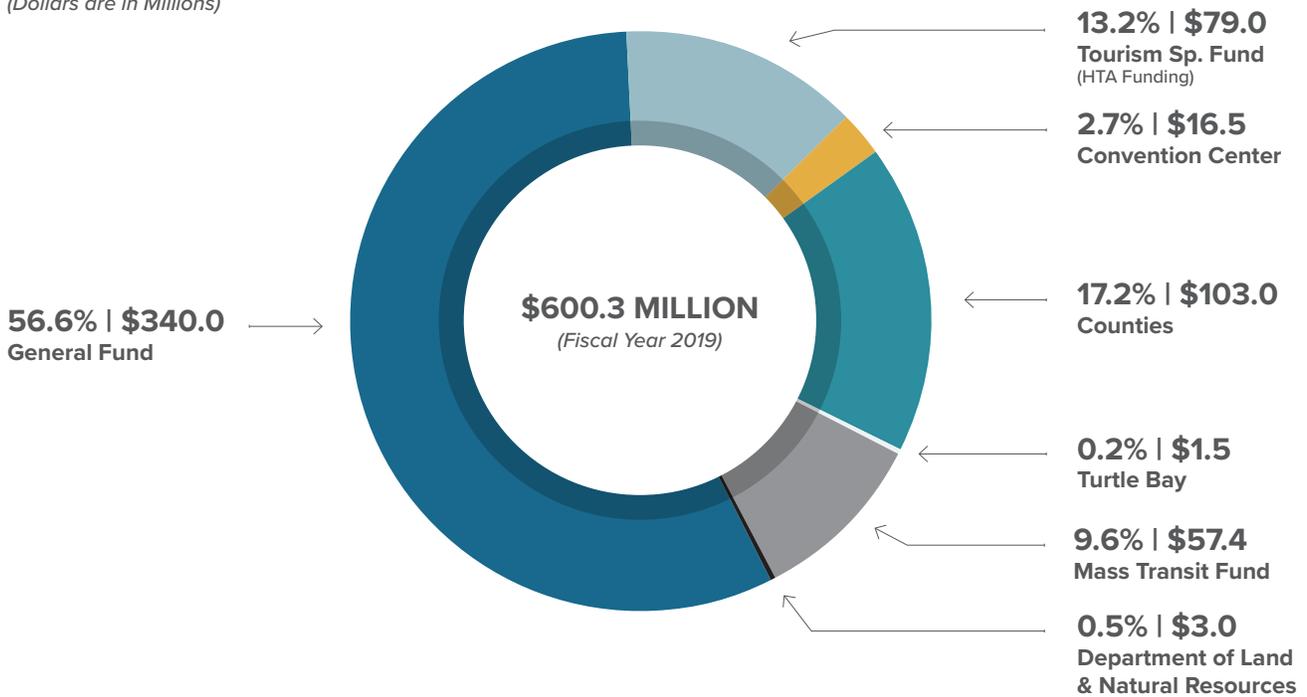
A budget of \$79 million is a sizeable amount, but for perspective, it represented less than 0.5% of the total Hawai'i State executive budget (\$17.3 billion) for FY 2019.

TOURISM'S ECONOMIC BENEFITS

Tourism supports a large portion of the state's economy. The impacts can be described in many ways. However, the most common ways to describe tourism's contribution are overall visitor spending and jobs. In 2019, visitor spending totaled \$17.75 billion, and the industry supported about 216,000 jobs.

In addition to the direct benefits of visitor spending, there are also indirect benefits, as employment and services not directly tied

Figure 6: TAT Amounts Allocated to HTA & Other Purposes
(Dollars are in Millions)



to tourism are also supported by the “ripple effects” of visitor spending.

The State government directly benefits from taxes generated by visitor spending – a total of \$2.07 billion was generated in FY 2019 (direct, indirect, and induced). The TAT was implemented in 1987 as a 5% tax collected from hotels and other accommodations. Since then, the tax has been increased periodically. The rate is now 10.25% (effective January 1, 2018) and generates over half a billion tax dollars (\$600.3 million in FY 2019).

Besides this Special Fund, other TAT revenues have been designated for additional purposes, including the Hawai'i Convention Center, assistance to the Department of Land and Natural Resources, and a Turtle Bay special fund to support a land management initiative on O'ahu's

North Shore. In FY 2019, the counties were allocated \$103 million of which City & County of Honolulu received \$45.4 million (or 44.1% of the counties' allocation), County of Maui received \$23.4 million (22.8%), County of Hawai'i received \$19.2 million (18.6%), and County of Kaua'i received \$14.9 million (14.5%). The most recent change to the TAT was a 1% increase in 2018 to help fund the Honolulu Area Rapid Transit project (4% of receipts or \$23.6 million).

FIGURE 6: INSIGHTS

The Transient Accommodations Tax is 10.25% and generates over half a billion dollars annually.

Tourism's Economic Benefits - 2019

TOTAL SPENDING	JOBS SUPPORTED	TAXES GENERATED BY VISITOR SPENDING
\$17.75	216	\$2.07
BILLION	THOUSAND	BILLION

Situation Analysis Summary

STRENGTHS

Hawai'i Enjoys...

- Strong brand awareness
- An intangible but real spirit of aloha and a distinct and vibrant Hawaiian host culture
- Natural advantages for tourism including climate, natural beauty and environment
- Unique characteristics that set it apart from other destinations including its history and heritage
- A variety of experiences across six islands
- A wide variety of accommodations and activities
- A multiethnic resident population
- A distinctive regional cuisine
- A perception of relative safety
- Strong levels of visitor satisfaction
- Strong hotel occupancy and financials
- Strong relationships with tour operators and airlines
- Diversity in its source markets

OPPORTUNITIES

Hawai'i Can Potentially Take Advantage of...

- Increasing the percentage of higher-spending visitors in its visitor mix
- Smoothing seasonality
- Growing interest in "voluntourism"
- Communications programs fostering responsible and respectful tourism
- Emerging technologies to manage tourism patterns and impacts
- Improved abilities to sell business travel resulting from the reorganization of the sales process
- Development of new international or long-haul markets resulting from extended air routes
- Visa waivers and initiatives to streamline the visa application process
- Island chapter presence in each county providing an on-the-ground resource to connect with local communities and issues

WEAKNESSES

Hawai'i Faces...

- A relatively weak "value for the money" perception
- Declining average daily visitor spending
- Competition from destinations requiring shorter travel times and offering lower prices
- Limited capacity for international flights to the Neighbor Islands
- An aging visitor infrastructure
- Overstressed and poorly maintained visitor sites and attractions; traffic congestion; airport inefficiencies
- An increasing "visitor load" (average number of visitors as a percent of total population) causing stress, especially on Neighbor Islands
- Eroding resident support for tourism
- Limited financial resources
- A perception that its strong leisure brand makes it an inappropriate business destination
- Labor shortage

THREATS

Hawai'i Can Be Affected by...

- Natural disasters, hazards, crimes, and violence
- Climate change
- Beach erosion
- Economic downturns
- Lower visitor counts and total spending if recently enacted regulations on short-term vacation rentals significantly impact travel
- Volatile international currencies, political events, and uncertainty
- Increasing restrictions on visas
- Adverse publicity generated by safety issues, unrest, or labor disputes
- Health-related incidents and epidemics
- Disruptions in air service
- Reductions in air seats
- Increased competition

2.1 CONCLUSIONS ABOUT HTA'S EVOLVING ROLE IN MARKETING HAWAI'I

Since our beginning, marketing has been a core part of HTA's mission. The role of marketing, though, has evolved as conditions have changed over time.

With roughly 10 million visitor arrivals, the focus of marketing is no longer set on driving volume. With flat or declining per-person per-day visitor spending, strategic targeting

to attract higher-spending visitors is more important than ever. With visitors finding their way to residential, culturally sensitive, or unsafe sites, marketing has an expanded role in promoting safe and respectful traveling, and marketing programs now include initiatives to influence visitors after they arrive.

2.2 CONCLUSIONS ABOUT HTA'S EMERGING ROLE IN DESTINATION MANAGEMENT

In 1902, the Hawai'i Promotion Committee was formed with a \$15,000 budget and a mission aptly reflected in its name: To promote travel to Hawai'i and grow the number of visitors here. That focus remained constant through the years.

However, within the last few years, the need to expand that focus became clear as visitor pressure on popular sites and residential areas grew, and the number of tourist arrivals approached 10 million annually.

Community leaders and government representatives have identified tourism issues and specific sites where tourism has affected the quality of life for residents and the quality of experience for visitors. Media coverage provides regular accounts of resident frustrations. Clearly, Hawai'i has reached a point where the impacts of tourism need to be actively managed.

In this environment, HTA has defined our role as a convener, collaborator, and supporter, working with other agencies

and organizations that have direct authority or jurisdiction to manage Hawai'i's tourism challenges.

To ensure that management efforts are closely connected to community needs, HTA now relies on elected officials and community leaders to identify and prioritize issues and take the lead in working collaboratively for solutions.

To ensure that resources are available to address management issues, HTA is supporting other agencies within our ability and resources.

To ensure good stewardship of limited resources, all HTA projects are being linked to goals in the four "Pillars" of this plan: Natural Resources, Hawaiian Culture, Community, and Brand Marketing.

To maintain Hawai'i's position as a premier, world-class destination that delights its visitors and supports its residents' lifestyle and values, HTA has expanded its role in supporting destination management.

3

STRATEGIC PLAN CORE CONTENTS

As noted in the Introduction, this plan is for HTA as an agency – focusing primarily on what HTA can do on its own, and secondarily, what it hopes to do in partnership with other public and private organizations.

The “destination management” side of Hawai‘i tourism has many needs that HTA alone cannot usually meet. These include improvements to infrastructure (airports, roads, trails, etc.), clean bathrooms at parks, resort property upgrades, additional ocean-safety and environmental enforcement personnel, and other projects.

Addressing all of these would benefit residents as well as visitors. However, many of these are the legal or practical responsibility of other agencies (e.g., the State Department of Land and Natural Resources, State Department of Transportation, county governments, and elected officials).

HTA’S STRATEGIC PLAN FOCUSES ON:

- Marketing and brand management aimed at bringing more high-spending, low-impact visitors;
- HTA-initiated contributions to community, cultural, and natural resource assets benefitting residents and visitors alike; and
- Reaching out to partner organizations, elected officials, and community groups to see if, when, and how we can work together to achieve destination management outcomes.

ORGANIZATION OF HTA AND OF THIS PLAN

As currently organized, HTA has four “Pillars:”

- Natural Resources;
- Hawaiian Culture;
- Community (including community enrichment, workforce development, sports, safety and security); and
- Brand Management and Marketing (abbreviated here as Brand Marketing).

This plan is primarily organized by “Pillar.” However, there is substantial overlap and exchange among the “Pillars,” and together – along with support services and impact mitigation – they reinforce overall HTA operations. (See Figure 7.)

3.1 DEFINITIONS AND EXPLANATIONS OF TERMS USED IN THIS PLAN

Elements of the Plan. As used in this plan, the various parts, or elements, are defined as follows:

GOAL

A broad overall end result, expressed in general language. Goals may be ongoing and usually lack measures of success. They are typically followed by one or more Objectives, which are more definite and measurable.

OBJECTIVE

A more specific aspect of achieving a Goal. Objectives are expressed in ways suited to determining whether or not (or to what extent) they have been reached through Measures or Milestones.

MEASURE OF SUCCESS

A quantitative (numerical) way of expressing whether (or to what extent) an Objective has been reached. A “measure” involves some change in dollars, percentages, or other number in explicitly or implicitly desirable ways.

MILESTONE FOR SUCCESS

A qualitative way of determining progress toward an Objective (e.g. accomplishing a specific defined action). This is typically a new thing (e.g. starting a new program, or acquiring a capacity that is currently lacking, etc.) needed to reach the Objective. A “milestone” describes an intended action that either gets done as intended (success) or not (lack of success).

GUIDING PRINCIPLE

A value statement about how to accomplish Goals and/or Objectives. (In the following Section 3.2, these are expressed as “Responsibilities” or *Kuleana*.)

STRATEGIC CHOICE

An important overall or “high-level” decision about how to work toward Goals and/or Objectives. Most of the Strategic Choices on the following pages reflect different approaches being implemented from 2020 onward. However, a few are longstanding HTA choices of which the public is not always aware.

Other Terms Used in This Plan

RESPONSIBLE TOURISM

Ua Mau ke Ea o ka ʻĀina i ka Pono

(The life of the land is perpetuated in righteousness)

Responsible Tourism has been defined as “making better places for people to live in and better places for people to visit.”⁴ More specifically, Responsible Tourism is described as tourism that:

- “minimizes negative economic, environmental and social impacts;
- generates greater economic benefits for local people and enhances the well-being of host communities, improves working conditions and access to the industry;
- involves local people in decisions that affect their lives and life changes;
- makes positive contributions to the conservation of natural and cultural heritage, to the maintenance of the world’s diversity;
- provides more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of local cultural, social and environmental issues;
- provides access for people with disabilities and the disadvantaged;
- is culturally sensitive, engenders respect between tourists and hosts, and builds local pride and confidence.”

HAWAI’I BRAND

As defined in Hawai’i Revised Statutes §201B-6(a), “... the programs that collectively differentiate the Hawai’i experience from other destinations.” A brand is the sum total of the physical, intangible, and perceived aspects of a product or service that distinguish it from alternatives.

GLOBALLY ALIGNED OR GLOBALLY COORDINATED

Hawai’i tourism is marketed in nine major market areas (MMAs) that together include selected target markets around the world. To effectively communicate the essence of Hawai’i’s brand, the core message must be consistent and aligned across markets. Within this core message, marketing contractors can adjust the message to reflect local market styles and preferences.

DESTINATION MANAGEMENT

As defined in this plan, this includes attracting and educating responsible visitors; advocating for solutions to overcrowded attractions, overtaxed infrastructure, and other tourism-related problems; and working with other responsible agencies to improve natural and cultural assets valued by both Hawai’i residents and visitors.

ENVISIONED IMPACT PLANNING COMPONENT

On a long-term basis, this means moving toward a more organized approach to minimizing negative tourism impacts – both in responding to existing concerns and planning in order to prevent future ones. It also involves thinking more broadly about developing the necessary framework to achieve this end (inclusive of budgetary, staffing, legal authority, and inter-agency coordination).

The inclusion of such an “Envisioned Planning Component” in the following Figure 7 represents a commitment by HTA to explore these issues. There may be other steps needed beyond those listed in Figure 7. However, the steps shown – such as possibly adding a staff position for planning and community facilitation – currently seem the most likely for further exploration.

⁴ Responsible Tourism was defined in Cape Town in 2002 during the World Summit on Sustainable Development. This definition, the Cape Town Declaration, is now widely accepted and was adopted by the World Travel Market in 2007 for World Responsible Tourism Day.

3.2 HTA'S GUIDING PRINCIPLES AND STRATEGIC CHOICES

HTA'S RESPONSIBILITIES (OUR KULEANA)

Above and beyond HTA's legal responsibilities, our *kuleana* is to:

- Actively address broad tourism issues by shifting more of HTA's resources into destination management, attracting and educating visitors, and working with other agencies to strengthen natural and cultural assets valued by both Hawai'i residents and visitors.
- Lead the visitor industry in supporting a strong Hawai'i economy. Even as we focus more on tourism management, it is also our *kuleana* to communicate tourism's economic benefits, such as providing jobs and tax revenues.
- Protect and market the Hawai'i "brand" while managing the destination. We understand this balance point will be a moving target over time.
- Place resident interests and benefits first. It is our responsibility to listen to tourism-related resident concerns, and to collaborate with industry, community, and government to work toward solutions.

STRATEGIC CHOICES FOR THE NEXT FIVE YEARS: CLARIFYING AND INCREASING DESTINATION MANAGEMENT

HTA, like any organization, must make strategic choices about how to best use our limited resources. Hawai'i's economy depends on tourism, and we will continue to focus primarily on marketing the Hawai'i brand. However, as we put more emphasis on destination management, we will move forward with the following strategies:

- HTA is now spending proportionately more time and money on programs that strengthen what makes Hawai'i unique in the world and that benefit the community. Our marketing efforts have more emphasis on educating visitors to travel responsibly and attracting visitors who create greater social and economic benefits.
 - We are emphasizing growth in the social and economic benefits of tourism and reducing its impacts to our natural and cultural resources. We will focus on higher-spending visitors rather than growth in visitor numbers, and we will pay greater attention to impact management.
 - We will continue to respond to specific tourism-related issues and contribute to solutions on a case-by-case basis – when invited by elected officials and supported by the community.
 - We will explore ways to become more involved in destination planning and management at the county and state levels through collaboration with public and private sector partners. (See Figure 7 – “Envisioned Impact Planning Component”)
- We are focusing on destination management as an integrated system. This will include ongoing efforts to bring together county, state, federal, and private agencies to address specific tourism-related issues at overcrowded sites; offering timely responses to other community concerns; airport and harbor issues; visitor education; marketing to higher-spending, lower-impact visitors; and supporting organizations that strengthen social, cultural, and environmental activities for residents and visitors.
- HTA's integrated destination management system rests upon four “Pillars” of (1) Natural Resources; (2) Hawaiian Culture; (3) Community (including sports and safety); and (4) Brand Marketing. (See Figure 7.)

Hawai'i Tourism Authority's *Kuleana*

ADDRESS

broad tourism issues by shifting resources into destination management.

LEAD

the visitor industry in supporting a strong Hawai'i economy.

PROTECT

and market the Hawai'i "brand" while managing the destination.

PLACE

residents' interests and benefits first.

The Four Pillars of HTA's Investments in Assets Benefiting Both Residents & Visitors

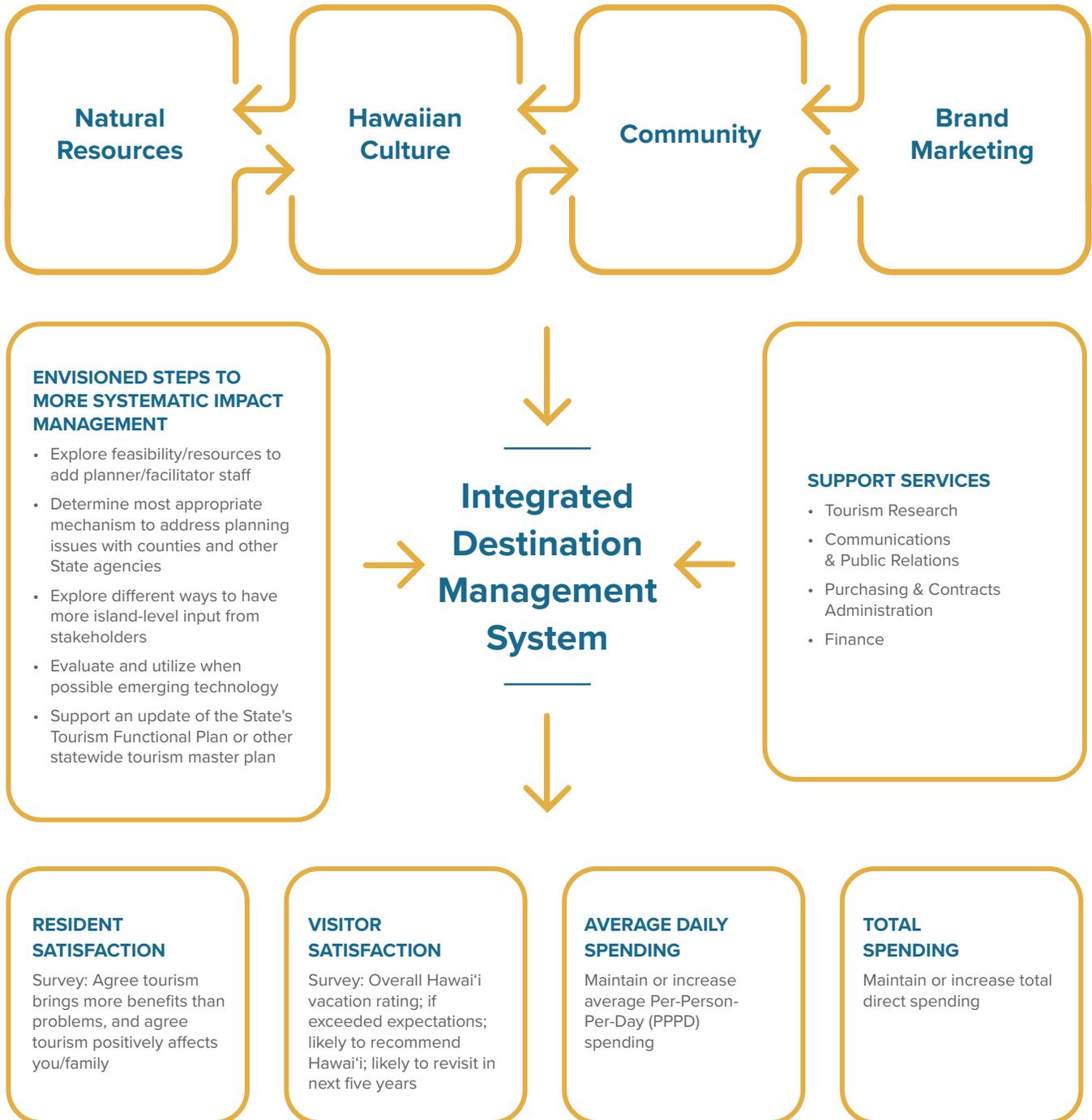


Figure 7: HTA Destination Management Based on Four Pillars



NATURAL RESOURCES PILLAR

*Respect for Our Natural
& Cultural Resources*



HAWAIIAN CULTURE PILLAR

*Support Native Hawaiian
Culture & Community*



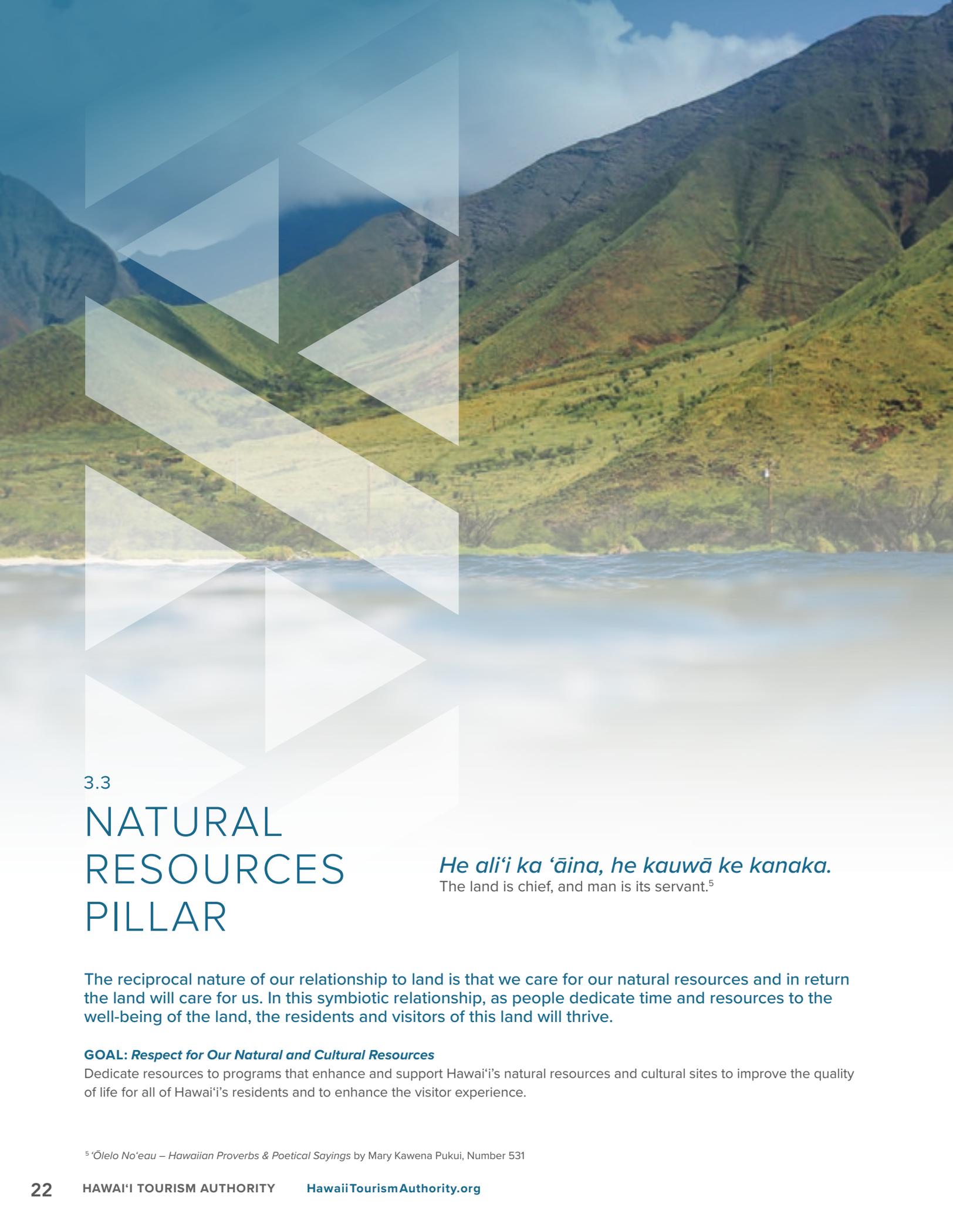
COMMUNITY PILLAR

*Ensure Tourism & Communities
Enrich Each Other*



BRAND MARKETING PILLAR

*Strengthen Tourism's
Contributions*



3.3

NATURAL RESOURCES PILLAR

He ali'i ka 'āina, he kauwā ke kanaka.
The land is chief, and man is its servant.⁵

The reciprocal nature of our relationship to land is that we care for our natural resources and in return the land will care for us. In this symbiotic relationship, as people dedicate time and resources to the well-being of the land, the residents and visitors of this land will thrive.

GOAL: *Respect for Our Natural and Cultural Resources*

Dedicate resources to programs that enhance and support Hawai'i's natural resources and cultural sites to improve the quality of life for all of Hawai'i's residents and to enhance the visitor experience.

⁵ 'Ōlelo No'eau – Hawaiian Proverbs & Poetical Sayings by Mary Kawena Pukui, Number 531

GUIDING PRINCIPLES

- Support, nurture, and amplify conservation and natural resource management by communities, nonprofits, and county, state, and federal agencies.
- Engage and encourage active education and management strategies of natural resources in areas frequented by visitors.

STRATEGIC CHOICES

- Over the next five years, we are increasing our attention to improving and enhancing visitor-impacted infrastructure and natural resources, such as forests, parks, trails, cultural sites, beaches, and reefs.
- As we invest in the uniqueness and biodiversity of our islands, we are supporting sustainable management, responsible tourism, and educational outreach in areas with high visitor traffic.
- Recognizing the impacts of climate change and sea level rise, we will be coordinating and collaborating with relevant organizations to make the tourism industry more resilient.

OBJECTIVES AND ASSOCIATED MEASURES

OBJECTIVE 1:

Encourage and support sustainable and responsible tourism.

- Milestone(s)/Measure(s) for Obj. 1:
 - (a) Increasing number of training sessions provided for visitor industry partners.
 - (b) Increasing number of management level trainings.

OBJECTIVE 2:

Engage and encourage active natural and cultural resource management strategies in areas frequented by visitors.

- Milestone(s)/Measure(s) for Obj. 2:
 - (a) Maintained or increased funding by HTA to other agencies for improving and managing tourism-impacted natural and cultural sites in proportion to overall budget.
 - (b) Identification of high impact areas by mobile location data tracking.

OBJECTIVE 3:

Promote visitor industry alignment with the Aloha+ Challenge, Hawai'i's recognized model to achieve the United Nations Sustainable Development Goals, especially for energy and water.

- Milestone(s)/Measure(s) for Obj. 3:
 - (a) Increased number of partners/organizations joining the Hawai'i Green Business (HGB) Program.
 - (b) Initiation of efforts to track sustainable efforts of the visitor industry, possibly in these key areas:
 - Increased number of kilowatt hours saved;
 - Reduced amount of water consumed;
 - Increased number of renewable energy installations;
 - Reduced amount of petroleum used;
 - Reduced amount of plastic waste.

PROGRAMMATIC ACTIONS:

- Provide funding through requests for proposals (RFPs) to organizations whose projects manage, protect, and improve Hawai'i's natural resources.
- Support efforts that encourage the visitor industry to purchase local products and locally grown food whenever appropriate to reduce dependence on imports and increase local economic activity.
- Contract to provide sustainable tourism certification and industry training modules to partners.
- Assist and recognize visitor industry businesses that operate in an environmentally and socially responsible manner, including local food purchasing and products, waste reduction, and reducing petroleum-based energy, and water usage.
- Conduct a collaborative environmental sustainability program with natural resource partners to mitigate visitor impacts and support responsible tourism initiatives.
- Collaborate with other government agencies, business/property owners and senior management to protect and enhance recognition of Hawai'i as a green destination and to meet or exceed the state's climate change and sustainability goals through the Aloha+ Challenge.



3.4

HAWAIIAN CULTURE PILLAR

‘O ke aloha ke kuleana o kāhi malihini.

Love is the host in strange lands. Every guest is treated as family.⁶

Ho‘okahi nō lā o ka malihini.

A guest for only a day.⁷

Feelings of affection, compassion, mercy, sympathy, kindness, grace, charity, and so much more are appropriate translations of *aloha*. Through *aloha*, visitors are no longer guests after a day. They are contributing members of the family having the same *kuleana* as we do to protect all that is Hawai‘i.

GOAL: Support Native Hawaiian Culture/Community

Ho‘oulu (grow) the uniqueness and integrity of the Native Hawaiian culture and community through genuine experiences for both visitors and residents.

GUIDING PRINCIPLES

- Strengthen the relationship between the visitor industry and the Hawaiian community.
- Strive to nurture the Hawaiian culture by creating visitor experiences, activities, and marketing programs that are respectful and accurate.
- Support Hawaiian programs and cultural practitioners, craftsmen, musicians, linguists, and other artists to help preserve and perpetuate Hawaiian culture

STRATEGIC CHOICES

- We are giving increased emphasis to the Hawaiian language by preserving language resources past and present, and by encouraging appropriate use of the language.
- We are strengthening the interaction of the HTA with other Native Hawaiian-serving organizations in alignment with our goals and objectives.

⁶ *‘Ōlelo No‘eau – Hawaiian Proverbs & Poetical Sayings* by Mary Kawena Pukui, Number 2453

⁷ *‘Ōlelo No‘eau – Hawaiian Proverbs & Poetical Sayings* by Mary Kawena Pukui, Number 1078

OBJECTIVES AND ASSOCIATED MEASURES

OBJECTIVE 1:

Support the everyday use of the Hawaiian language.

- Milestone(s)/Measure(s) for Obj. 1:
 - (a) Maintained or increased proportion of total budget for HTA cultural programs each year, specifically those focused on ‘ōlelo preservation or education.
 - (b) Increased annual number of visits and unique visitors to the *Ma‘ema‘e* toolkit on the HTA website.

OBJECTIVE 2:

Ensure the accurate portrayal of Hawaiian culture by HTA’s marketing contractors.

- Milestone(s)/Measure(s) for Obj. 2:
 - (a) Establishment of criteria for cultural content of marketing materials.
 - (b) Assurance, through annual marketing contractor performance review of marketing and promotional materials and activities, that these materials and activities meet the standards of the cultural and language content criteria.

OBJECTIVE 3:

Encourage accurate portrayal of Hawaiian culture in visitor industry marketing and experiences for visitors.

- Milestone(s)/Measure(s) for Obj. 3:
 - (a) Sponsorship or co-sponsorship of a statewide conference bringing together industry decision makers, cultural practitioners active in the industry, and various Native Hawaiian cultural groups to review best practices in marketing and visitor experiences.
 - (b) Publication of recommendations from the conference, along with participants’ comments about the feasibility of carrying out the recommendations.

OBJECTIVE 4:

Increase understanding and respect for cultural practitioners, cultural sites, and cultural resources.

- Milestone(s)/Measure(s) for Obj. 4:
 - (a) Establishment of a system for measuring and reporting the number of lodging industry entities with on-site cultural practice programs and practitioners, results to be tracked/reported annually.
 - (b) Numerical results of a survey (at least once during the next five years) of HTA’s cultural training program graduates to determine extent of their activities.
 - (c) Development of a partnership with recognized Hawaiian cultural organizations to identify sites that are being used appropriately or inappropriately for touristic purposes.

OBJECTIVE 5:

Provide the visitor industry with opportunities for Native Hawaiian cultural education and training for its workforce.

- Milestone(s)/Measure(s) for Obj. 5:
 - (a) Establishment of a requirement in workforce cultural training contracts to assess and report on program effectiveness.
 - (b) Annual reporting data that indicate increased numbers of organizations offering products and services certified as meeting HTA standards.

PROGRAMMATIC ACTIONS

- Provide funding for Native Hawaiian festivals and events that perpetuate the Hawaiian culture and community, and create unique and memorable experiences for residents and visitors.
- Provide the visitor industry, including senior level management and business owners, with access to comprehensive Hawaiian cultural training, curriculum and program.
- Work with contractors to enhance the visitor experience with programs that create and nurture a Hawaiian sense of place.
- Support Hawaiian cultural practitioners by creating opportunities in the visitor industry while enhancing the visitor experience.
- Fund programs that help to revitalize and normalize ‘ōlelo Hawai‘i (Hawaiian language).
- Enhance programs to provide meeting planners with an introduction to Hawaiian history and culture.
- Work with the University of Hawai‘i to require that all HTA funded scholarships include coursework in Hawaiian Studies and Hawaiian Language.
- Elevate the position of Hawaiian cultural experts within the visitor industry to develop standards and practices.

3.5

COMMUNITY PILLAR

‘A‘ohe hana nui ke alu ‘ia.
No task is too big when done together by all.⁸

What’s good for the community is good for tourism. Effective communication with local residents about tourism, its contributions, and how it affects their community is important. When opportunities to collaborate and support community projects present themselves, we can all, collectively, help diversify the visitor experience.

GOAL: Ensure Tourism and Communities Enrich Each Other

Work to make sure residents and local communities benefit from tourism by supporting projects valued by the community and aligned with the destination’s brand and image; informing both residents and visitors of these projects and events; strengthening relations between residents and visitors; and forming partnerships to build a resilient tourism workforce and community.

GUIDING PRINCIPLES

- Work from the premise that “What’s good for the community is good for tourism.”
- Enhance the quality of life for residents and overall experience for visitors.
- Invest in programs that support community activities valued by residents and visitors for the social, economic, and environmental benefits they bring.

STRATEGIC CHOICES

- Our communications leadership position is now focusing on communications with local residents about tourism’s contributions to our communities.
- We are now requiring HTA-sponsored sports events to have clear and measurable community benefits and a strong nexus to tourism.
- We are expanding resources and support for safety-related programs that impact residents and visitors.
- As part of the new destination management emphasis, we are exploring how to create a stronger and more systematic approach to managing tourism impacts.

OBJECTIVES AND ASSOCIATED MEASURES

OBJECTIVE 1 (Community Enrichment):

Generate and/or invest in initiatives and projects that provide for positive resident-visitor interaction, celebrate Hawai‘i’s multicultural heritage, and support better relations between communities and the tourism industry.

- Milestone(s)/Measure(s) for Obj. 1:
 - (a) Targeted attendee satisfaction is at least 85%.
 - (b) Targeted percentages of attendees/participants are at least 25% residents and at least 25% visitors.
 - (c) Number of new or improved projects funded.
 - (d) Improved Resident Sentiment Survey measure on “Tourism is good for me and my family.”

⁸ ‘Ōlelo No‘eau – Hawaiian Proverbs & Poetical Sayings by Mary Kawena Pukui, Number 142

OBJECTIVE 2 (Workforce Development):

Help build a globally competitive visitor industry workforce with programs for residents starting from school age, to college students, and to those already in the visitor industry.

- Milestone(s)/Measure(s) for Obj. 2:
 - (a) Successful initiation of a schedule bringing together industry and education partners in a workforce committee to meet at least twice a year, beginning in the second half of 2020.
 - (b) HTA invests in at least three new programs as a result of the workforce committee.

OBJECTIVE 3 (Communications):

Generate effective messages to enhance residents' understanding of how Hawai'i tourism helps perpetuate Hawaiian culture, preserve the environment, and support communities.

- Milestone(s)/Measure(s) for Obj. 3:
 - (a) Growing reach and engagement on all HTA social media platforms.
 - (b) Increased numbers of news stories about HTA-sponsored events and programs.

OBJECTIVE 4 (Safety & Security):

Support education and prevention programs to improve safety among visitors and residents and to maintain Hawai'i's reputation as a safe destination.

- Milestone(s)/Measure(s) for Obj. 4:
 - (a) Improved visitor awareness of ocean and hiking safety information, as measured by increase in the percentage of surveyed visitors that recall seeing or hearing a safety-related video or message.
 - (b) Annual Marketing Effectiveness Study (MES) results for selecting Hawai'i as "It is a safe and secure place" and reason to return to Hawai'i as "It is safe."
 - (c) Annual Visitor Satisfaction Survey (VSAT) results for item "Based on your most recent trip to Hawai'i, how would you rate the state of Hawai'i on being a safe and secure destination?"

OBJECTIVE 5 (Safety & Security):

Actively participate in Hawai'i Emergency Management Agency's (HI-EMA's) preparedness exercises and serve as a communications link to assist Hawai'i's visitor industry and visitors during times of crisis.

- Milestone(s)/Measure(s) for Obj. 5:
 - (a) Number of channels/tools available (and if needed, used) to inform and educate visitor industry businesses and visitors about various foreseeable types of emergencies.
 - (b) Maintained or improved exercise measurements as established by HI-EMA.

OBJECTIVE 6 (Mitigation):

Identify, mitigate, and address key issues threatening community support for tourism and the integrity of Hawai'i's tourism industry by working with public agencies and private organizations.

- Milestone(s)/Measure(s) for Obj. 6:
 - (a) Number of issues identified by island.
 - (b) Number of issues addressed via stakeholder meetings by island.

OBJECTIVE 7 (Sports):

Support sports programs that create community engagement, have marketing value, provide economic benefits, support Hawai'i's youth, and are aligned with Hawai'i's brand.

- Milestone(s)/Measure(s) for Obj. 7:
 - (a) Economic impact from high-profile sporting events.
 - (b) Number of communities reached/served through the sports programs.
 - (c) Number of youth participation through the sports programs.

PROGRAMMATIC ACTIONS

- Provide funding through requests for proposals (RFPs) to support community projects that help diversify the visitor experience and align with our guiding principles.
- Provide development and training opportunities to build community organizations' effectiveness.
- Increase awareness of HTA-funded community programs.
- Expand programs that build a strong, globally competitive workforce for Hawai'i's visitor industry, providing quality employment opportunities for residents. Create a taskforce to determine how to meet employer and employee needs.
- Conduct communications outreach and a social media campaign to educate residents and local media about the breadth and depth of tourism's statewide benefits.
- Invest in safety promotion and injury prevention programs, such as ocean and hiking safety videos, to educate and inform visitors and residents.
- Support security programs to enhance safety and curtail criminal activity.
- Support statewide water safety programs to increase safety awareness at Hawai'i's beaches.
- Support visitor assistance programs such as the Visitor Aloha Society of Hawai'i (VASH) and its counterparts in each county.
- Actively participate in HI-EMA exercises and training that enhance HTA's ability to respond to crises.
- Convene community, government, and industry networks to support destination management and increase collaboration in responding to negative tourism impacts on Hawai'i's communities.
- Support sporting events that provide community benefits, as well as marketing and economic benefits.



3.6

BRAND MARKETING PILLAR

Pā i ka leo.

Touched by the voice.⁹

Lei Mahiki i ka ua kōkō‘ula.

Mahiki wears a lei of rainbow-hued rain.¹⁰

Hawai‘i is adorned with its unique culture and natural landscapes. The warm voice that calls out to visitors is inviting and welcoming. This voice also instructs us to *nihī ka hele*, to tread softly, so that our travel activities are low-impact, coordinated, authentic, and market-appropriate. In the eyes of the beholder, Hawai‘i is a destination paradise. It is important to educate residents and visitors on how to respect these voices of care and value.

GOAL: Strengthen Tourism’s Contributions

Take the lead in protecting and enhancing Hawai‘i’s globally competitive brand in a way that is coordinated, authentic, and market-appropriate; is focused on Hawai‘i’s unique culture and natural environment; and supports Hawai‘i’s economy by effectively attracting higher-spending, lower-impact travelers.

⁹ *‘Ōlelo No‘eau – Hawaiian Proverbs & Poetical Sayings* by Mary Kawena Pukui, Number 2575

¹⁰ *‘Ōlelo No‘eau – Hawaiian Proverbs & Poetical Sayings* by Mary Kawena Pukui, Number 1972

GUIDING PRINCIPLES

- Develop effective marketing plans for each of HTA's designated major market areas (MMAs) with a common brand message, communicated in a way that is market appropriate.
- Differentiate Hawai'i from its competition by focusing on our unique Hawaiian culture, authentic activities, natural environment, and attractions, by engaging Native Hawaiian organizations.
- Focus marketing on higher-spending, lower-impact prospects by developing data-driven plans based on a deep understanding of current visitors and the visitor of the future.
- Nurture partnerships with industry partners – especially airlines, wholesalers, hoteliers, cruise lines, and others in the travel distribution system.
- Align marketing programs with the responsible development of tourism, including appropriate elements of the Aloha+ Challenge.
- Use advances in technology to enhance marketing efficiency and effectiveness, reach intended audiences, and promote responsible tourism.

STRATEGIC CHOICES:

- We are managing marketing programs by implementing a review system tied to measurable results, closely linking contractor performance to HTA marketing principles and objectives.
- We are focusing more on Responsible Tourism within our marketing plans, including post-arrival programs to promote visitor safety and responsible travel.
- We are contracting with a centralized MCI (Meetings, Conventions, Incentives) sales and marketing organization to manage convention center, large multi-property, and single-property meetings; provide centralized global coordination; and improve credibility.
- We are collaborating with our contractors to coordinate the development of marketing materials for regions around the world with a common brand platform while allowing for market-specific nuances.

OBJECTIVES AND ASSOCIATED MEASURES

OBJECTIVE 1:

Ensure that Hawai'i's brand image is globally aligned and consistent with marketing principles of authenticity, uniqueness, and Responsible Tourism.

- Milestone(s)/Measure(s) for Obj. 1:
 - (a) Prospective visitors surveyed in the Marketing Effectiveness Survey (MES) who were aware of Hawai'i marketing materials but had never been to Hawai'i scoring statistically higher in perceptions of uniqueness of the destination than those who were unaware.
 - (b) Assurance, through annual contractor performance review and HTA oversight checklists, that marketing materials in each major market area have consistent branding, are aligned with core values, and are appropriately adapted for nuances in each market.

OBJECTIVE 2:

Ensure marketing is focused on higher-spending, lower-impact market segments in each market area.

- Milestone(s)/Measure(s) for Obj. 2:
 - (a) Development of an expanded target list of higher-spending, lower-impact market segments by each Global Marketing Contractor.
 - (b) Increased percentages of the marketing budget devoted to high-spending market segments, along with increased MCI arrivals.
 - (c) Annual results of a new Visitor Satisfaction survey question asking if visitors recall hearing or seeing information about safe and responsible travel.

OBJECTIVE 3:

Maintain or improve the strength of Hawai'i's brand relative to its competitors.

- Milestone(s)/Measure(s) for Obj. 3:
 - (a) Improved Hawai'i's ratings in the MES for "value" and "unique experiences."

PROGRAMMATIC ACTIONS

- Contract for marketing in designated market areas and manage their programs in order to attract visitors to Hawai'i consistent with HTA's goals and guiding principles.
- Implement a Responsible Tourism marketing communications program to educate visitors both pre- and post-arrival with specific information about safe and respectful travel.
- Work with island-based organizations representing all six islands to maintain appropriate branding for each island, coordinate with all market contractors, and collaborate with island-based stakeholders.
- Work with subject matter experts to optimize the use of technology to take advantage of emerging applications and opportunities.

ACKNOWLEDGMENTS

The Hawai'i Tourism Authority extends our sincere appreciation to all of the people below, who each contributed their time and *kōkua* to this Strategic Plan. Mahalo!

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Regional Vice President, Sales & Marketing
Highgate

Eric Workman
Vice President & Chief Marketing Officer
Polynesian Cultural Center

SAFETY

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Hilton Hawaiian Village Waikiki Beach Resort

Jessica Lani Rich
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CULTURE

John De Fries
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Nā Ala Hele Program Manager,
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Brian Neilson
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Chief Resiliency Officer
City & County of Honolulu

Trisha Kēhaulani Watson
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Hon. Derek Kawakami
Mayor
County of Kaua'i

Hon. Michael Victorino
Mayor
County of Maui

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County of Maui

Edwin Hawkins
Director, Office of Economic Development
City and County of Honolulu

Diane Ley
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County of Hawai'i

Robbie Melton
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County of Kaua'i

Ipo Mossman
HTA Liaison, Office of Economic Development
County of Maui

Terryl Venci
Community Liaison (Tourism), Office of the Mayor
County of Maui

STATE GOVERNMENT

Linda Chu Takayama
Chief of Staff
Gov. David Ige

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Chair
House Tourism and International Affairs
Committee

Sen. Glenn Wakai
Chair
Senate Energy, Economic Development
and Tourism Committee

Rep. Sylvia Luke
Chair
House Finance Committee

Mike McCartney
Director
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Economic Development & Tourism

Ross Higashi
Deputy Director (Airports)
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John Richards
Dean of Business, Legal, Technology,
Culinary & Hospitality
Kapi'olani Community College



THE ALOHA+ MĀLAMA MANDATE

On April 19, 2019, Hawai'i's island leaders signed the Aloha+ Mālama Mandate in honor of Global Goals on Local Action Day. This marked Hawai'i's designation as a United Nations Local2030 Hub – the first hub in the Pacific and Island hub worldwide. The Hawai'i Tourism Authority recognizes the importance of supporting the Mālama Mandate for the future Hawai'i, our residents, and as a premier visitor destination.

The Hawai'i Tourism Authority commits to the Mālama Mandate as a Call to Action through 2025. Inspired by our love for Hawai'i, our collective ancestors and descendants, and our commitment to navigating towards a better future for Island Earth, we will:

- Perpetuate *mālama* values and the spirit of *aloha* within my personal life, my 'ohana, my community, and with visitors, as well as through my work and the respective institutions we serve;
- Take action to advance the Aloha+ Challenge, Hawai'i's local framework to achieve the United Nations Sustainable Development Goals, through a *mālama 'āina* approach;
- Honor the legacy of the Native Hawaiian culture and knowledge, which are embodied in the legacy of *Mālama Hawai'i* and the message of *Mālama Honua* carried across the world's oceans by the *Hōkūle'a*;
- Build a global culture of sustainability for future generations, grounded in key values of *mālama*, 'ohana, *kuleana*, and *aloha*.
- Acting together, Hawai'i can be the starlight that helps others find the balance and share an island worldview with the rest of the world.

A collection of handwritten signatures in various styles, including cursive and block letters, representing the signatories of the Aloha+ Mālama Mandate. The signatures are arranged in several rows and columns, with some names appearing to be printed or semi-printed below the handwriting.



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