



FAST FACTS

- USA is the world's largest wellness tourism market.
- US\$259 billion wellness tourism spend annually (Source: Global Wellness Institute, 2025).
- Higher visitor yield – Hawai'i is repositioning tourism towards longer stays, higher value and more meaningful visitor experiences through destination stewardship and regenerative tourism.
- Six major visitor islands – Each with a Destination Management Action Plan.

Hawai'i is demonstrating how regenerative tourism and wellness travel can work together to support a higher-value visitor economy. As the state continues to shift its focus from visitor volume to visitor yield, wellness tourism offers a natural alignment - attracting travellers who stay longer, spend more, engage more deeply with local communities and contribute to the long-term wellbeing of people, place and culture.

HAWAI'I CASE STUDY 2026

WELLNESS SNAPSHOT

Global Wellness Institute -
Wellness Destination Tourism Initiative

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A PLACE WHERE CULTURE, NATURE & WELLNESS CONNECT

Hawai'i demonstrates that wellness extends well beyond spas and resorts. For generations, Native Hawaiian traditions have recognised the deep relationship between physical, spiritual and environmental wellbeing. Today these cultural foundations continue to shape visitor experiences through traditional healing, locally grown food, movement, storytelling, music, connection with the ocean and respectful engagement with place.

This approach reflects Hawai'i's transition from measuring tourism success by visitor numbers to measuring the quality of visitor experiences and the value they create for communities. Wellness travellers naturally align with this vision through longer stays, deeper cultural engagement, greater participation in nature-based experiences and higher average visitor expenditure.

Across the islands, visitors can experience wellness through forest immersion, regenerative farms, botanical gardens, ocean adventures, lomilomi massage, locally inspired spa rituals and cultural experiences that celebrate Hawai'i's living heritage.

Each island offers its own expression of wellness. O'ahu combines urban wellbeing with forest immersion and cultural experiences. Hawai'i Island connects visitors with volcanic landscapes, native forests and regenerative agriculture. Maui celebrates local food, farming and ocean experiences, while Kaua'i's gardens, valleys and coastline encourage slower, nature-based travel. On Lāna'i, personalised luxury wellness is integrated with conservation and nature.

Together these experiences position Hawai'i as a global leader in regenerative and cultural wellness tourism.

JENNIFER GASKIN
HAWAII TOURISM AUTHORITY

“WELLNESS IN HAWAII BEGINS WITH THE WELLBEING OF OUR PEOPLE, OUR CULTURE AND OUR COMMUNITIES. THROUGH MĀLAMA - CARING FOR AND GIVING BACK TO THE PLACES WE CALL HOME - WE ARE CREATING VISITOR EXPERIENCES THAT ARE MORE MEANINGFUL, MORE AUTHENTIC AND MORE REGENERATIVE FOR EVERYONE”

KEY SUCCESSES

DESTINATION MANAGEMENT

Every major visitor island now operates under a community-led Destination Management Action Plan, aligning tourism with resident priorities, environmental stewardship and cultural protection.

PROTECTION OF NATURAL CAPITAL

Forests, reefs, watersheds and agricultural landscapes are living environments and shared resources that support visitor, community, cultural and environmental wellbeing.

REGENERATIVE TOURISM

Hawaii has become a global leader in embedding regenerative tourism principles into statewide tourism planning.

HIGHER VALUE VISITOR ECONOMY

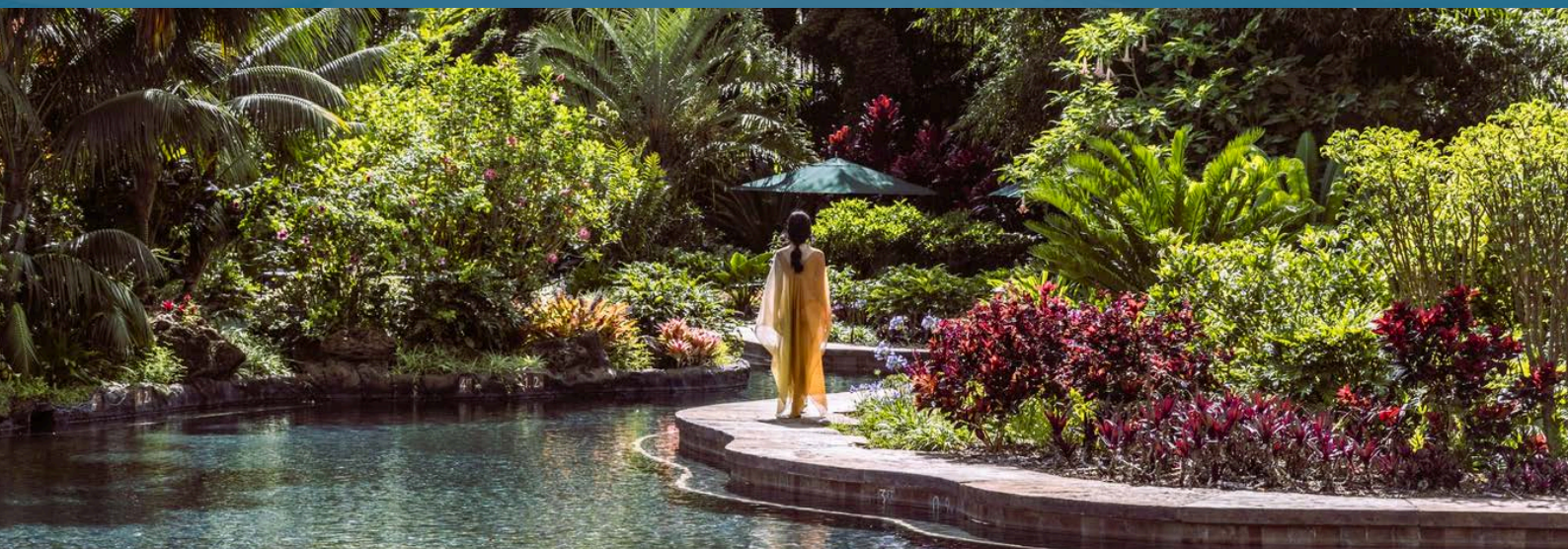
Wellness tourism supports Hawaii's strategic focus on visitor yield by attracting travellers seeking meaningful experiences, longer stays and deeper engagement with communities and culture.

LIVING CULTURAL WELLNESS

Native Hawaiian traditions continue to shape Hawaii's wellness identity through cultural practitioners, traditional healing, movement, food and authentic experiences grounded in place.

YEAR-ROUND APPEAL

Nature, movement, culture and world-class wellness accommodation create compelling reasons to visit throughout the year.



HEALTHY DESTINATIONS CREATE HEALTHY VISITORS.

KEY LEARNINGS

Hawai'i demonstrates that visitor wellbeing is strongest when communities, ecosystems and cultural heritage are healthy and resilient.

Native Hawaiian culture provides Hawai'i's greatest point of difference. Authentic cultural leadership creates experiences that cannot be replicated elsewhere while strengthening local identity and community pride.

Government and community collaboration has been fundamental. Destination Management Action Plans provide island-specific frameworks for addressing tourism-related impacts and opportunities for advancing community-identified destination stewardship priorities.

Wellness extends beyond traditional resorts. Increasingly, visitors seek experiences that combine luxury with local food, nature, conservation, movement and meaningful cultural connection.

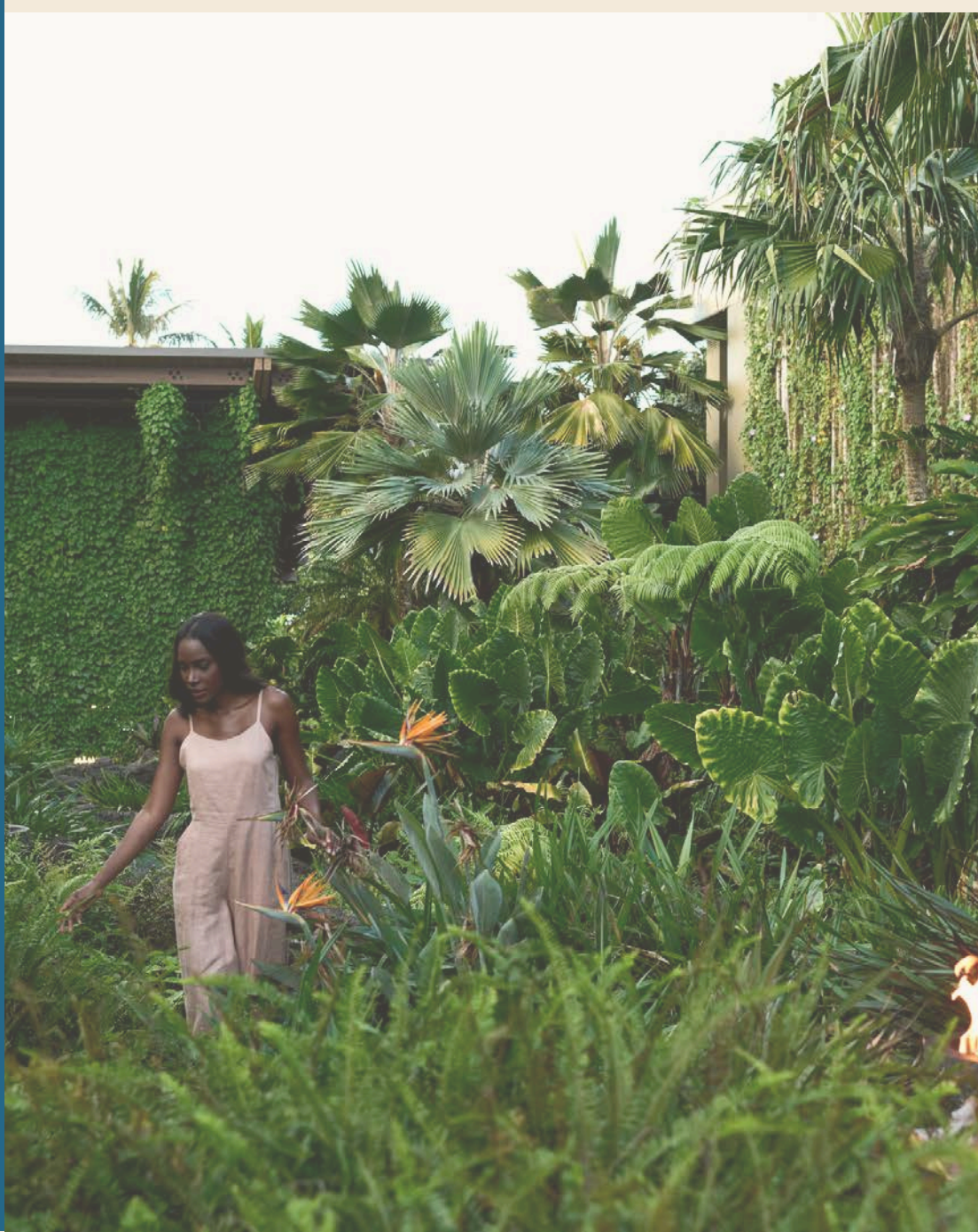


FUTURE OPPORTUNITIES

- Continue strengthening regenerative tourism through the implementation of island-based Destination Management Action Plans.
- Continue supporting Native Hawaiian cultural practitioners and community-led visitor experiences that protect and celebrate Hawai'i's living heritage.
- Continue expanding nature-based and cultural wellness experiences that deepen visitor connection while supporting local communities.
- Continue positioning and building brand awareness for Hawai'i as a leading regenerative wellness destination that supports higher visitor yield through longer stays, meaningful experiences and positive outcomes for residents, visitors and the environment.



OPERATOR EXCELLENCE



Forest Bathing Hawai'i - O'ahu

Guided forest immersion experiences encouraging mindfulness, nature connection and restorative wellbeing within O'ahu's mountain landscapes.

Lā Kāhea Community Farm - Maui

A regenerative farm experience celebrating sustainable agriculture, seasonal food and community connection through hands-on learning.

Kona Cloud Forest Sanctuary - Island of Hawai'i

Immersive conservation experiences within one of Hawai'i's rare cloud forests, demonstrating the connection between biodiversity, restoration and personal wellbeing.

1 Hotel Hanalei Bay - Kaua'i

A benchmark for regenerative luxury hospitality integrating sustainability, wellness and immersive nature experiences.

Sensei Lāna'i, A Four Seasons Resort - Lāna'i

An internationally recognised wellness destination combining evidence-based health programmes with personalised wellbeing and nature.



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