

HAWAII ISLAND

**DESTINATION MANAGEMENT
ACTION PLAN 2021–2023**

‘Ōpelu ha‘alili i ke kai.

‘Ōpelu that make the sea ripple.

Said of active, quick-moving people.

HAWAII TOURISM
AUTHORITY

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ON THE COVER *This 'ōlelo no'eau speaks to the art of 'ōpelu fishing. Like the holili schools of 'ōpelu, fishermen look for the ripples on the ocean, but the real work is hidden and unseen.*

'Ōlelo No'eau—Hawai'i Proverbs & Poetical Sayings by Mary Kawena Pukui, Number 2532



I. Introduction

PURPOSE OF THE PLAN

In 2019, the Hawaiian Islands received a record high of 10.4 million visitors. While this brought in \$17.75 billion in total visitor spending to Hawai‘i’s businesses, \$2.07 billion in taxes generated, and supported 216,000 jobs statewide, it has also put pressure on some of our destinations and communities. This situation is not unique to Hawai‘i. Other popular destinations—from Venice, Italy to Machu Picchu, Peru, to Kyoto, Japan—also felt the negative effects of tourism, which not only impact the residents’ quality of life but also the quality of the visitor experience.

The Hawai'i Tourism Authority (HTA), in partnership with the counties and the respective visitor bureaus, developed community-based Destination Management Action Plans (DMAPs) that aim to **rebuild, redefine and reset** the direction of tourism over a three-year period. The focus is on **stabilization, recovery, and rebuilding to the desired visitor industry for each island**. The actions put forth in the DMAPs are guided by an island-based Steering Committee for each island, and includes a collaborative process which encourages participation and vital input from the community, visitor industry and other sectors. The DMAPs identify areas of need as well as actionable solutions for enhancing the residents' quality of life and improving the visitor experience across the islands.

HTA's 2020-2025 Strategic Plan is organized around four interacting pillars—Natural Resources, Hawaiian Culture, Community, and Brand Marketing, with more emphasis on addressing tourism impacts and greater destination management. In it, HTA defined Destination Management to include:

- 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.

The DMAP initiative is a part of HTA's strategic vision and plan to manage Hawai'i tourism in a responsible and regenerative manner.

The idea of “regenerative tourism” has gained momentum in 2020, especially as the global COVID-19 pandemic has made people more aware of tourism's opportunities and vulnerabilities. What is regenerative tourism? About 15 years ago, the model for “sustainable tourism” was instituted, built on tourism that was environmentally friendly, culturally sensitive and had less impact than high numbers of visitors.

Regenerative tourism takes sustainability one step further and focuses on the net benefit of the visitor economy to a destination, looking at the social and cultural benefits. “Regenerative tourism is bolder and more inspiring. It aims not just to do less harm, but to go on and restore the harm that our system has already done to the natural world, and by using nature's principles, to create the conditions of life to flourish. It views wholes and not parts, and is a very different way of looking at the world.” (Anna Pollock, international tourism consultant and founder of Conscious Travel)

Many of the actions in this plan take a regenerative tourism approach.



FORMATION OF THE DMAP

The process of the development of the Hawai‘i Island DMAP started in July 2020 with HTA and the County of Hawai‘i building off of the 2020 Hawai‘i Island Tourism Strategic Plan (TSP) process. Together, HTA and the county developed a list of Hawai‘i Island residents who not only represented the visitor industry sectors (hotel, attractions, activities), different business sectors (e.g. agriculture, retail), the community (e.g. Hawaiian culture, education), and other nonprofit organizations, but also the communities that they live in. Invitations were sent, and 19 members volunteered their time to participate on the Hawai‘i Island Steering Committee. Also fundamental to the DMAP process were the 38 members who have been volunteering their time to serve on the Hawai‘i Island TSP Action Cohorts (see Acknowledgement section).

At the first Steering Committee virtual meeting, the members reviewed HTA’s Strategic Plan in addition to the 2020 Hawai‘i Island TSP, including HTA’s key performance indicators and four pillars, as well as the county’s tourism goals. These two plans are the foundation of the Hawai‘i Island DMAP. From there, the Steering Committee and Hawai‘i Island TSP Action Cohorts identified and prioritized actions that built on the Hawai‘i Island TSP. The actions were grouped, and overarching actions and sub-actions were identified. They were presented to Hawai‘i Island residents at two virtual public meetings via Zoom on November 17 and 23, 2020. The community was encouraged to provide input at the virtual public meetings, as well as through an online input form. The results to the online input form can be found on HTA’s website.

On December 4, 2020, the Steering Committee gathered virtually to review the high-priority sub-actions under each of HTA’s pillars. The Steering Committee members, along with representatives from HTA and the county, reviewed the proposed actions and, where necessary, provided additional feedback and clarification. The Steering Committee then met on January 15, 2021 to critically examine destination attributes valued only by residents, only by visitors, and by both residents and visitors. They also discussed the destination attributes that were at risk or threatened. The Steering Committee brainstormed actions—what to protect or mitigate, what to preserve or grow, and where the gap can be closed or bridged using the identified actions from prior meetings—and then developed new ones. On February 5, 2021, the Steering Committee reviewed the updated refined anchor actions. On February 12, 2021, the Steering Committee selected the 10 anchor actions that the DMAP would focus on. Employees of HTA, the county, and the Island of Hawai‘i Visitors Bureau (IHVB) reviewed the proposed sub-actions to verify they could be done under their respective purviews. All of the actions were developed by the Steering Committee with input from the community.



Figure 1 Collaborative Process



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

‘OLELO NO‘EAU (HAWAIIAN PROVERB)

IMPLEMENTATION FRAMEWORK

Hawai‘i’s tourism industry is at a critical point and residents’ livelihoods depend on the recovery of the visitor industry—whether directly or indirectly. Tourism needs to be managed responsibly so that the residents and destination can thrive. HTA is leading many of the efforts in the Hawai‘i Island Destination Management Action Plan. However, there needs to be collaboration and support of other state and county agencies, in addition to the community, visitor industry and other sectors, to help move the actions forward. This three-year plan is a living document that will be evaluated annually.

II. Overview of Tourism in Hawai'i

OVERALL TRENDS

Tourism has remained the primary economic driver for Hawai'i's economy across all islands. In 2019, tourism was 16.2% of Hawai'i Gross Domestic Product (GDP), second to real estate and rental and leasing at 18.8% of Hawai'i GDP. Jobs in the tourism industry accounted for 20% of total jobs in Hawai'i while jobs in the real estate and rental and leasing sector accounted for 4.4% of total jobs. For the past eight years, the State of Hawai'i's visitor industry sustained annual growth in terms of arrivals and expenditures. In 2019, tourism was the largest single source of private capital for Hawai'i's economy. Total visitor spending reached \$17.84 billion (1.1% increase compared to 2018). Tourism generated \$2.08 billion in state tax revenue. A total of 10,424,995 visitors came to the Hawaiian Islands by either air service or cruise ship (5.4% increase over 2018).

The visitor industry has provided steady employment opportunities and supported the development of small businesses throughout the state. In 2019, tourism supported 216,000 jobs throughout the state. Hawai'i experienced record arrivals over the past few years with no significant increase in the number of traditional lodging units (e.g., hotels and resorts). However, unpermitted short-term rentals grew in Hawai'i's neighborhoods.

Prior to the global COVID-19 pandemic, 2020 was set to be another year of record growth for Hawai'i. However, the year ended with visitor arrivals down



73.8 percent to 2,716,195, with significantly fewer arrivals by air service (-73.8% to 2,686,403) and by cruise ship (-79.2% to 29,792). The average daily census or the number of visitors in Hawai'i on any given day was 78,421 (68.3% decrease over 2019). Compared to 2019, the average length of stay increased by 21.5% to 10.57 days. This was a result of visitors staying double-digit days during the state's trans-Pacific 14-day quarantine requirement that started on March 26, 2020. The state's pre-travel testing program started on October 15, 2020 as a way for travelers to bypass the mandatory quarantine requirement.

The majority of visitors to Hawai'i arrive by air, and thus air service to the islands is vital for Hawai'i's tourism industry. Total air capacity (number of seats) decreased 60.9 percent to 5,318,667 seats as a result of a reduction in air service to Honolulu (-60.0% to 3,370,122 seats), Kahului (-61.9% to 1,102,166 seats), Kona (-59.2% to 514,422 seats), Līhu'e (-67.7% to 322,993 seats) and Hilo (-81.3% to 8,964 seats).

Sails on the Hawai'i home-ported cruise ship, Norwegian Cruise Line's Pride of America, were suspended since April 2020 and out-of-state cruise ships were not permitted into the islands due to the Center for Disease Control and Prevention's (CDC) "No Sail Order" from March 14 to October 29, 2020. Thereafter, the CDC took a phased approach to resuming passenger operations.

Hawai'i's unemployment rate increased from 2.6 percent in the first quarter of 2020 to 20.3 percent in the second quarter and then decreased to 13.9 percent in the third quarter. The Hawai'i Department of Business, Economic Development & Tourism (DBEDT) projects that for 2020 overall, the average annual employment rate will be at 11.2 percent, then decrease to 7.9 percent in 2021 and 7.1 percent in 2022. These rates are significantly higher than Hawai'i's average unemployment rate of 2.5% from 2017 to 2019.

TOURISM FORECAST

According to DBEDT's 2020 fourth quarter Outlook for the Economy, total visitor expenditures is forecasted to end the year at \$5.11 billion (-71.4%) with 2.73 million visitor arrivals (-73.7%). Economists predict that it will take a couple of years before Hawai'i's visitor industry returns to previous levels.

RESIDENT SENTIMENT

HTA conducts an annual Resident Sentiment Survey (RSS) to gauge resident attitudes toward tourism in Hawai'i and to identify perceived positive and negative impacts of the visitor industry on residents. Resident sentiment is important to maintain a healthy industry. The 2019 RSS report showed that resident sentiment had generally weakened compared to the previous year. The report identified that the visitor industry's impact on the resident's overall quality of life is essential to improving resident sentiment—the balance of economic, social and cultural, and community benefits from tourism. Furthermore, providing residents with a voice in tourism development, creating jobs with opportunities for advancement, and creating shopping, dining and entertainment opportunities are key to improving resident sentiment.



TOURISM ON HAWAI'I ISLAND

Visitor Statistics

According to HTA's Tourism Research Division, almost two million visitors came to Hawai'i Island in 2019 resulting in roughly 35,700 visitors (+1.9%) on any given day based on the average daily census. Provided that Hawai'i Island's resident population was 200,980 in 2018 and grew by 1% then, on average, visitors comprised of about 15% of all inhabitants on the island in 2019. Total visitor spending was \$2.315 billion. Half of the visitors stayed in hotels while condominiums, timeshare resorts and vacation rentals were also used. The majority of visitors were from the U.S., followed by Japan and Canada.

The global COVID-19 pandemic significantly affected visitor arrivals to Hawai'i Island in 2020. Visitor arrivals dropped 72.1 percent to 492,325 visitors. The average length of stay grew 37.5 percent to 10.11 days. The average daily census was 13,604 visitors, a decline of 61.7 percent over the same period a year ago. There were significantly fewer air seats (-59.2% to Ellison Onizukua Kona International Airport at Keāhole and -81.3% to Hilo International Airport from the domestic market and -75.3% to Kona from the international markets) year-over-year.

2019 Hawai'i Island Visitor Satisfaction

According to HTA's 2019 Visitor Satisfaction Report, U.S. visitors rated their Hawai'i Island visit "excellent" and were likely to recommend the destination. However, they expressed concerns about traffic, wanting to experience more local culture, and variety of restaurants/dining options.

2019 Resident Sentiment

According to HTA's 2019 Resident Sentiment Report, residents felt that visitors were responsible for traffic, showed no respect for culture/'āina, contributed to the cost of living, played a role in damaging the environment, and also added to the issue of overcrowding. Though there was just a slight increase for residents

feeling that "tourism has brought more benefits than problems" compared to 2018, overall resident sentiment on this topic has actually decreased throughout the past decade. As the visitor industry seeks an equal balance of socio-economic, cultural, and community benefits, the key to improving resident sentiment will be improving the quality of life for residents.

Jobs

In the third quarter of 2020, Hawai'i County lost 10,900 jobs (-15.6% over the same quarter of 2019). Jobs decreased the most in the Accommodations sector which lost 4,000 jobs (-69.0%), followed by Food Services and Drinking Places which lost 1,500 jobs (-21.7%), Retail which lost 1,300 jobs (-13.4%), and Transportation, Warehousing, & Utilities which lost 1,200 jobs (-35.3%). Year-to-date third quarter 2020, the unemployment rate increased to 11.9 percent compared to 3.5 percent during the same period last year.

Visitor Accommodations

In 2020, hotel occupancy for Hawai'i declined to 38.0 percent (-39%) from 77.0 percent year-over-year. The average daily rate (ADR) dropped slightly to \$254.27 (-4.2%) from \$265.44 in 2019. Room demand was 674,000 room nights or 62.8 percent lower than 2019. The room supply was 1.772 million room nights (-24.7%).

In comparison, Hawai'i Island's vacation rental supply for 2020 was down 42.1 percent to 1.4 million unit nights. Hawai'i Island vacation rentals ended the year with 44.6 percent occupancy (-32.7 percentage points) and ADR of \$188 (-20.5%). A vacation rental is defined as the use of a rental house, condominium unit, private room in a private home, or share room/space in private home. The data does not determine or differentiate between units that are permitted or unpermitted. The "legality" of any given vacation rental is determined on a county basis.

SITUATION ANALYSIS SUMMARY

As a part of the DMAP process, a SWOT analysis was conducted by various community members and stakeholders who identified the destination's existing strengths and weaknesses, as well as opportunities and threats present in the external environment. The SWOT analysis is a useful tool in the decision-making process, as it can be used to evaluate strategic positioning, as well as identify projects that would be reasonable to execute in the short term.

This feedback was supplemented with research and data that helped to support the observations that were made. The information below provides more details on each section of the SWOT analysis matrix shown on page 13.

Strengths

The participating community members and stakeholders highlighted several strengths that would be important to leverage as plans are put into actions.

Collaborative nature of the Hawai'i Island tourism industry. Many industry representatives indicated that they were willing to work together and that they already had existing relationships with whom others might consider competitors. This willingness to communicate and collaborate will be necessary for many of the proposed actions to be successful.

The culture of Hawai'i Island. The strong sense of 'ohana and kuleana provides motivation to support actions happening on the island and also helps to support communication and collaboration. The multicultural diversity of Hawai'i Island was also mentioned as a strength. This diversity provides visitors with an experience that they cannot get anywhere else.

The uniqueness of Hawai'i Island as a tourist destination. Hawai'i Island is unique in terms of its atmosphere and the feelings that it evokes. It also has an abundance of natural and cultural resources, which are a draw for travelers from around the world and will continue to bring visitors to the island, as long as the resources are properly maintained and sustained.

Current projects that are already in development or are already being rolled out. For example, although transportation was mentioned as a challenge for many visitors, there are several transportation-related projects that could help to address this challenge. The County of Hawai'i has been researching and developing a hydrogen bus system for the island, and has taken into consideration major aspects of such a project, including the geographic placement of refueling stations and the cost of maintenance and repair.



Weaknesses

Although a significant number of existing weaknesses were mentioned by community members and stakeholders, many participants had already been thinking about how to overcome them. Some of the opportunities listed in the following section provide avenues for addressing these weaknesses.

The need to keep tourism dollars circulating on Hawai'i Island. After visitors spend money on the island, it has been difficult to keep those dollars in motion within the local economy. Finding more ways to allow community members to spend their income locally is a specific goal.

Getting visitors to understand that Hawai'i Island is more than just a tourist destination. For many visitors that view Hawai'i Island as an island paradise, it can be difficult to understand that this is home for many families and individuals. Helping visitors to understand this and to understand that what they do while on vacation can have significant negative impacts on those living here has been a challenge. Relatedly, the need to increase resident satisfaction with the visitor industry was also presented as a weakness. However, should visitors have a more positive impact on the island in the future, this would help to increase resident satisfaction.

Lack of training programs for workers. More training is needed in several areas, including natural resource management and cultural resource management. Such programs would help to promote the wonderful natural and cultural resources in an authentic way and help to educate visitors about the need to and importance of respecting, maintaining, and sustaining these resources. This would help to improve both the visitor mindset and resident satisfaction.

Measuring impacts and tracking data. This weakness is especially true of tracking and recording an inventory of natural resources, which can be very difficult. However, should this weakness be improved upon, it would create more opportunities to acquire various sources of funding. By attaching hard figures to illustrate the positive impacts of current projects and programs, funders will be more likely to support these programs, as well as similar programs in the future.

Siloing. Most community members and stakeholders have to work very hard to make a living on Hawai'i Island, which can make it difficult for them to think outside of their day-to-day activities. It can be hard to find time to connect with those outside of their inner circles and certainly those outside of their particular industry. However, more communication between industries and with other stakeholders could help to unearth additional opportunities for a wide range of community members.

Transportation for both visitors and community members alike. Given the geographic concentration of tourism industry jobs and the high cost of land and homes in the surrounding areas, many community members are forced to commute long distances. In addition, those without access to cars are often extremely limited in terms of the distance they can cover due to limited public transportation options. However, as previously mentioned, there are multiple projects underway that hope to address some of these weaknesses.

The lack of affordable workforce housing. Again, due to the high cost of land and homes in and around the resort areas where most of the jobs are, affordable housing within a reasonable distance is difficult to find. Finding creative solutions for workers to have affordable housing options near their place of work could help to address this weakness.

A lack of funding for public spaces. In particular, it was mentioned that more funding is needed to maintain parks and trails. The need for better management of public spaces in general was mentioned as a challenge, but the lack of funding also provides a barrier to the staffing and resources needed for that management activity.

Opportunities

Most community members and stakeholders had a very positive mindset and focused on the various opportunities currently available or available in the near term.

COVID-19 as an opportunity to make a change for the better. Given that the pandemic essentially put a halt to the tourism industry on Hawai'i Island, many see this as an opportunity to change the economy to have a tourism industry that is more sustainable than it has traditionally been.

Share an authentic Hawai'i with visitors. Survey findings show that an increased number of visitors are looking for more authentic experiences that are different from the conventional tourist vacation. To support this type of experience, more training programs for workers are needed so that they can provide accurate and authentic information to visitors. In addition, a resource center was presented as an opportunity to provide visitors and community members alike with historically and culturally accurate information. The use of the Pono Pledge is also an opportunity to support positive visitor interaction with Hawai'i Island.

Creative solutions to address affordable housing. Creative solutions include affordable housing land trusts and self-help housing. One looks to address the issue of the high cost of land, while the other one looks to significantly decrease the cost of the vertical construction. Either option would help to increase the possibility of community members living closer to their places of work.



Better align marketing and sales strategies between businesses and organizations. Better alignment would help to create clearer and more cohesive messaging to both visitors and residents. Relatedly, the current utilization of social media and existing websites leaves significant room for improvement. This is also an opportunity to improve marketing and sales strategies and alignment.

Community partnerships to manage resources. This could be an effective and cost-efficient way to manage both natural and cultural resources, as community groups are the most knowledgeable in regards to resources within the community and could

present a better alternative to outsourced resource management services. An increase in stewardship opportunities for community members would provide new, local, sustainable businesses with potential income generation. This would help to improve the management of natural and cultural resources, and provide local workforce opportunities for community members. In addition, stewardship opportunities could also be offered to visitors looking to make a positive impact in the communities they visit. This would be a low-cost way to additionally support the natural and cultural resources on Hawai'i Island.

Establish an airport and harbors “ambassadors” program. Members of this program would help to make airport signage and educate visitors, prior to or upon arrival, on basic information that will enhance their safety, enjoyment and understanding of local and Hawaiian culture and natural resources. Such a program would help to address several threats and weaknesses that have been identified and could potentially help to improve both visitor and resident sentiment and satisfaction.

Use currently underutilized facilities that are already in existence. Community members and stakeholders have already identified several different facilities that are currently not in use. These facilities present potential low-cost opportunities for both new ventures, as well as the expansion of existing businesses, organizations, programs and activities.

Reimagine measures of success. This can be achieved by developing measures that focus on supporting communities and residents rather than attracting visitors. For example, allocating a higher percentage of the Transient Accommodations Tax (TAT) to support community-driven initiatives and improving community facilities to demonstrate a relationship between tourism success and resident well-being.

Threats

The COVID-19 pandemic has clearly had a significant impact on the visitor industry, the economy, and the local workforce.

The pandemic initially halted virtually all travel and it is possible that visitor numbers for Hawai'i Island will never return to their pre-pandemic peak.

Resorts and hotels are still dealing with low occupancy and the new regulations present new challenges for visitors who want to visit the island. All of this is in addition to the immediate COVID-19 health concerns.

Difficulty for hotels to purchase local goods and products. Working to break down these barriers would not only benefit the hotels and the visitors staying there, but it would also provide local producers and distributors with new revenue stream opportunities.

Lack of job opportunities and the need for greater diversity in terms of jobs available to community members. This has been an ongoing issue and drastic changes due to the COVID-19 situation will affect how people can travel. The type of visitor and the experiences they desire could also change significantly. This could necessitate the incorporation of new activities and a new way for visitors to experience Hawai'i Island. This, in turn, would require a workforce to help manage and operate these new activities, which would provide new job opportunities for community members.

Situational Analysis Summary

Strengths

- Collaborative nature of the Hawai'i Island tourism industry
- Strong sense of 'ohana and kuleana
- Hawai'i Island as a unique destination
 - Strong sense of place
- Abundance of natural and cultural resources
- Multicultural diversity
- Transportation projects already in the works
 - Hydrogen buses
 - Bikeshare program

Weaknesses

- Difficult to keep tourism dollars circulating on island
- Lack of understanding that Hawai'i Island is more than just a tourist destination.
- Measuring impacts and data tracking, including natural resources
- Siloing due to lack of communication between stakeholders, industries, etc.
- Need for more training programs
- Transportation is difficult given the size of the island and lack of options
- Need for increase in resident satisfaction with visitor industry
- Funding for parks and better management of public spaces overall
- Lack of affordable workforce housing

Opportunities

- COVID-19 and related impacts
 - Opportunity to positively change economy
- Share an authentic Hawai'i with visitors
 - Training programs for workers
 - Resource center
- Aligning marketing and sales strategies
 - Better utilization of social media and existing websites
- Use of the Pono Pledge

Threats

- COVID-19 and related impacts
 - Decrease in number of visitors
 - Low occupancy for hotels and resorts
 - Health concerns
- Barriers preventing hotels from purchasing local goods and products
- Lack of job opportunities and the need for a greater diversity of positions



III. Vision for Tourism on Hawai'i Island

The vision for Hawai'i Island's Destination Management Action Plan (DMAP) is "*Ola ka 'Āina, Ola ke Kānaka*" ("Healthy Land, Healthy People"), which uplifts the vision of Hawai'i Island's 2020–2025 Tourism Strategic Plan (TSP). "*Ola ka 'Āina, Ola ke Kānaka*" represents a vision affirmed by data and stakeholder feedback. The vision maintains a connection to our past, grounds us in the present, and envisions a collective future that puts this place and the people of this place first. It is carried forward from the 2006–2015 Hawai'i Island Tourism Strategic Plan and 2016 Hawai'i Island Tourism Roadmap, and lays the foundation of the TSP. Without *ola* (health), there is no responsible tourism.

The vision is supported by the Connections Framework that supports connection to place, community, past and future, and to your better self. It is also supported by the understanding that if we are grounded in place, we are able to intentionally share our love of place with others, beginning with our family, our community, and including visitors. This vision also sets out the importance of a high quality of life for residents and a focus on social benefits that will support a meaningful, reciprocal experience for residents and visitors.

IV. Goal

The goal of the Hawai'i Island DMAP is to rebuild, redefine, and reset the direction of tourism over a three-year period.



V. Objectives

There are six objectives to achieve the goals and vision of Hawai'i Island's DMAP.

OBJECTIVE 1

Create positive contributions to the quality of life for Hawai'i Island's residents.

OBJECTIVE 2

Support the maintenance, enhancement, and protection of Hawai'i Island's natural resources.

OBJECTIVE 3

Ensure the authentic Hawaiian culture is perpetuated and accurately presented in experiences for residents and visitors, materials and marketing efforts.

OBJECTIVE 4

Maintain and improve visitor satisfaction of their experience on Hawai'i Island.

OBJECTIVE 5

Strengthen the economic contribution of Hawai'i Island's visitor industry.

OBJECTIVE 6

Increase communication and understanding between the residents and visitor industry.

VI. Actions

The following actions were developed by the Steering Committee and the community, and they address what the residents desire for Hawai'i Island's visitor industry and their communities. In a few instances, HTA took the essence of the community's feedback and transformed them into actionable initiatives.

The actions were shaped by overarching themes that were identified by the Steering Committee and also appeared in the community input:

- Āina-based education and actions centered around community-driven stewardship.
- Opportunities for community-led decision making and involvement of āina-based/place-based organizations in tourism.
- Two-way communication and engagement between government, the visitor industry and communities.
- Importance of pono practices undertaken by both residents and visitors.
- Management and protection of natural and cultural resources.
- Residents' quality of life is looked after.

The actions were also cross-referenced against the four interacting pillars of HTA's Strategic Plan—Natural Resources, Hawaiian Culture, Community and Brand Marketing—to ensure alignment and for organizational purposes.

The following tables identify opportunities and needs for each of the anchor actions, including the identification of responsible agencies and timing of the action's commencement and/or delivery over a three-year period. As HTA carries out the DMAP, there will be more organizations and businesses identified to help move this plan forward.



The long-term **measures of success** will be measured through HTA's Strategic Plan's four overall Key Performance Measures: Resident Satisfaction, Visitor Satisfaction, Average Daily Visitor Spending, and Total Visitor Spending. A "milestone" is a qualitative way of determining progress toward accomplishing a specific defined action. The **milestones for success** are the completion of each sub-action in the phase indicated.

HAWAI'I ISLAND

Action A

Protect and preserve culturally significant places and hotspots.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
A.1	Develop and support opportunities to mālama and steward the places and culture of Hawai'i Island for both residents and visitors, including using Native Hawaiian practices of resource and cultural stewardship.	L = County, Dept. of Land & Natural Resources (DLNR) S = HTA, Island of Hawai'i Visitors Bureau (IHVB)	X	X	X
A.2	Emphasize local area cultural history and expertise to further expand Hawaiian cultural values, knowledge, and language with an emphasis on connection to place.	L = County, DLNR S = HTA, IHVB	X	X	X
A.3	Increase opportunities for community-led initiatives that steward and manage these resources, including closure of areas and managing traffic.	L = County, DLNR S = HTA, IHVB	X	X	X
A.4	Work with the different stakeholders to communicate areas that need to be protected with the visitor industry and visitors.	L = County, DLNR S = HTA, IHVB	X	X	X

Action B

Develop resources and educational programs to perpetuate authentic Hawaiian culture and 'Ōlelo Hawai'i.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
B.1	Identify and assess proper providers and learning tools.	L = Native Hawaiian Hospitality Association (NaHHA) S = HTA, County	X		
B.2	Support Hawaiian cultural educational and training programs – including 'Ōlelo Hawai'i (Hawaiian language) for the employees in the visitor industry (e.g. hotels, tour guides).	L = NaHHA S = HTA, County, IHVB	X	X	X
B.3	Develop a recognition program for businesses who complete the Native Hawaiian Hospitality Association (NaHHA) programs (e.g. placards/certification).	L = NaHHA S = HTA	X	X	
B.4	Actively promote HTA's Ma'ema'e Toolkit to the visitor industry and business communities.	L = HTA S = County, IHVB, other associations	X	X	
B.5	Increase support and opportunities for cultural practitioners and community members to interact. Educate the visitor industry and individual companies about place-based practices to become more place-based.	L = NaHHA S = HTA, County, IHVB	X	X	X
B.6	Support a Tour Guide Certification Program.	L = HTA S = County, IHVB		X	X
B.7	Continue support of programs and projects that perpetuate the Hawaiian culture with the community and visitors, such as HTA's Kūkulu Ola program.	L = HTA S = County, IHVB		X	X
B.8	Encourage the integration of 'Ōlelo Hawai'i into workforce and adult training programs.	L = NaHHA S = HTA, County	X	X	X

Action C

Support and promote 'āina-based education and practices to protect and preserve our natural resources so that residents and visitors will aloha 'āina.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
C.1	Identify, support, and partner with existing and new 'āina-based groups that are protecting and stewarding wahi pana (legendary/celebrated places or landmarks), cultural practices, and people.	L = County, DLNR S = HTA	X	X	X
C.2	Create opportunities for community members to share in an ongoing way about the impact of tourism as well as the wahi pana, historically significant sites, and sacred sites that need to be protected.	L = County, DLNR S = HTA	X	X	X
C.3	Pilot a certification program, in collaboration with community leadership and the university system, for workers tied to natural resources, cultural resources, and stewardship. Identify and review existing 'āina-based curricula, and create new curricula when necessary, that emphasizes Native Hawaiian knowledge, culture, place, and pono practices-based management. Develop curriculum that is led by efforts from that area and connects firmly to place-based management and stewardship.	L = County S = University of Hawai'i (UH), HTA	X	X	X
C.4	Support interested 'āina-based groups to serve as interpretive educators, trainers, and/or cultural ambassadors to share cultural knowledge with the guest and visitor industry, tour operators, and other business owners.	L = County S = IHVB, HTA		X	
C.5	Support enhanced interpretation and education on Maunakea, including partnership with the Hawaiian community and residents.	L = UH – 'Imiloa S = County, IHVB, HTA	X	X	X
C.6	Work with the different stakeholders to communicate areas that need to be protected in collaboration with the visitor industry and visitors.	L = County S = HTA, IHVB, DLNR	X	X	X

Action D

Connect with community networks and partner with community-based organizations to collaboratively identify sites, identify limits of acceptable change, and implement stewardship plans to protect and preserve our natural resources.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
D.1	Build capacity in communities to support increased opportunities for community-led stewardship actions and initiatives to manage resources, such as closing areas or limiting access (visitor and potentially resident) during certain times of the year.	L = DLNR, County S = HTA	X	X	X
D.2	Implement regenerative management strategies, like those found in the kapu system, Hā'ena on Kaua'i, East Maui, and Hanauma Bay on O'ahu. Provide clear opportunities and processes for local communities to participate in visitor access and resource and congestion management in their communities.	L = County, DLNR S = HTA		X	X
D.3	Support and advocate for stewardship efforts of coastal waters and beaches that incorporate and emphasize a mauka to makai collaborative approach given broader environmental implications.	L = County, DLNR S = HTA		X	X
D.4	Work with communities in each place to identify the limits of acceptable change as associated with public impact on natural and cultural resources and develop a process for ongoing stewardship that is community-led. Explore the creation of pilot projects and employ adaptive management principals to find the optimal balance between visitation and associated impact.	L = DLNR S = County, HTA		X	X
D.5	Support opportunities that tie in Native Hawaiian practices of resource and cultural stewardship.	L = HTA, OHA S = County	X	X	X
D.6	Explore policies and regulations that aid in the implementation of stewardship plans and enforcement of critical need areas.	L = County S = HTA	X	X	X
D.7	Explore implementation of geo-fencing technology to aid management of sites.	L = HTA S = DLNR, County, IHVB	X	X	X
D.8	Find ways to support communities who do not know how to deal with "rogue" users of natural and cultural resources.	L = County S = DLNR, HTA, IHVB	X	X	X

Action E

Create opportunities for ongoing dialogue, communications, and engagement between the visitor industry, government and communities to improve community-industry relations and better serve the community.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
E.1	Develop an education and awareness campaign targeted at residents using traditional and social media vehicles.	L = HTA S = County, IHVB	X	X	
E.2	Create opportunities for visitor industry, government, and community stakeholders to connect on a regular basis for ongoing dialogue to 1) create shared understanding of the issues that our communities and the visitor industry face; 2) ensure that the visitor industry is supporting a sustainable and healthy Hawai'i Island; and 3) inform about tourism's contributions to the community.	L = HTA S = County, IHVB	X	X	X
E.3	Increase and maintain regular opportunities to collaborate with HTA on its outreach efforts in the community to ensure a more robust and coordinated effort. This includes informing the industry and community about HTA's mission and its resources, and sharing the destination's marketing efforts and activities to orient businesses and communities about HTA, IHVB and the Global Marketing Team's initiatives.	L = HTA S = County, IHVB	X	X	X

Action F

Implement a comprehensive communications and education plan that facilitates positive community-visitor relations and pono practices, including the Pono Pledge.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
F.1	Increase messaging efforts to uplift and improve access to the Pono Pledge, and shift visitor and resident mindsets as they travel around Hawai'i Island.	L = IHVB, County S = HTA, private sector, community	X	X	
F.2	Provide visitors with easy access to messaging, including increasing information pathways and educational materials, related to protecting culture and sense of place (i.e. in-flight videos on in-bound flights in multiple languages; rental cars; radio station public service announcements; podcasts; required place-based visitor orientation, etc.).	L = IHVB S = HTA, GMT	X	X	
F.3	Continue to encourage and work with visitor industry stakeholders and businesses to integrate the Pono Pledge into their practices, such as business booking reservations, QR codes, phone apps, and monitors at the baggage claim.	L = IHVB, County S = HTA, private sector, community	X	X	
F.4	Collaborate with all segments of the visitor industry and community-based organizations for stewardship opportunities for visitors to leave Hawai'i Island a better place.	L = IHVB S = HTA, County	X	X	

Action G

Promote agritourism, and partner with Hawai'i Island's agriculture industry to support local food security.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
G.1	Create, support, and promote agritourism initiatives to connect local producers with visitors; provide visitors an active experience with nature and agriculture; and support legal vacation rentals in rural areas (e.g. farm stays) to alleviate the need for illegal vacation rentals in rural areas.	L = HTA S = County, IHVB	X	X	X
G.2	Encourage the visitor industry (e.g. hotels and restaurants) to buy local produce, products, and goods.	L = HTA S = County, IHVB	X	X	X
G.3	Support efforts of local producers to sell their goods online by strengthening online infrastructure, transportation of goods, marketing, and fulfillment of orders.	L = County	X	X	

Action H

Invest in community-based programs that enhance quality of life for communities.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
H.1	Support community-led and activated efforts and offer capacity building/education opportunities to strengthen Hawai'i Island's product offerings.	L = HTA S = County	X	X	
H.2	Uplift approaches to tourism that are reflective of Hawai'i Island and its different communities.	L = IHVB S = HTA, County, GMT	X	X	
H.3	Revisit measures of success and visitor industry activities so that the relationship between increased tourism and resident well-being would lead to an increase in community improvements and benefits.	L = HTA S = IHVB			X

Action I

Advocate/create more funding sources to improve infrastructure.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
I.1	Engage in cohesive infrastructure planning to address community and industry needs, such as incorporating plans to widen bike paths in tandem with other necessary road repairs.	L = County S = HTA	X	X	X
I.2	Coordinate with government entities, institutional stakeholders, and nearby private landowners.	L = County S = HTA	X	X	X
I.3	Advocate for CIP projects for infrastructure related to residents and visitors.	L = HTA S = IHVB		X	X

Action J

Improve enforcement of vacation rental regulations.

ACTION NO.	ACTION	LEAD (L) SUPPORT (S)	PHASING		
			1	2	3
J.1	Confirm the existing baseline of (number of) vacation rentals. Gauge the capacity for current and new rentals.	L = County S = HTA	X	X	
J.2	Explore ways to improve enforcement.	L = County	X	X	
J.3	Work with the rental platforms (i.e. AirBNB, VRBO) to help with regulation.	L = County S = HTA		X	X

VII. Tourism Hotspots

A “hotspot” is an area/site that attracts visitors due to its popularity, and may result in overcrowding, congestion, degradation of resources, safety hazards, and a negative experience for both the resident and visitor. While HTA is not an enforcement agency, it can be a catalyst to bring together respective state and county agencies, the community and private sector to develop solutions to address hotspot sites/areas.

HTA reviewed the community input from the surveys and community meetings, in addition to receiving feedback from the county, IHVB and the Steering Committee. Below are the “hotspot” areas/sites that HTA will monitor and work with respective agencies as needed to help mitigate the issues. Other areas/sites were identified, but the ones listed below are the ones that are of utmost concern.



The following hotspots were carried forward from the County of Hawai'i's TSP:

- Waipi'o Valley
- Ka'ū – Papakōlea/Green Sands Beach
- South Kona – Ho'okena, Miloli'i
- Kahalu'u Bay
- Kumukahi
- Keaukaha
- Maunakea
- Punalu'u

The following additional hotspots were identified by community members and stakeholders through the HTA DMAP webform in November 2020:

- Ali'i Drive
- Pololū Valley
- Māhukona
- Kalae (South Point)
- Kailua Pier
- Kealakekua Bay State Historical Park
- Ho'okena Beach
- La'aloa Beach (Magic Sands Beach)
- 'Akaka Falls State Park
- Keauhou Bay
- Banyan Drive
- Hawai'i Volcanoes National Park
- Hōnaunau Bay, Captain Cook Monument
- Wailuku River State Park
- Hāpuna Beach State Recreation Area
- Kiholo State Park Reserve

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Glossary

Adaptive Management: In natural resources, the term means learning by doing, and adapting based on what's learned (Walters and Holling 1990). It is based on the recognition that resource systems are only partially understood, and there is value in tracking resource conditions and using what is learned as the resources are being managed. Learning in adaptive management occurs through the practice of management itself, with adjustments as understanding improves. Source: U.S. Dept of the Interior

'Āina-Based: Bringing people to that 'āina and stewarding the different aspects and components of it.

Average Length of Stay: Number of days visitors are on the island, including the day of arrival and the day of departure.

Average Daily Census: Average number of visitors present in Hawai'i on a single day.

Limits of Acceptable Change: A proactive visitor management approach to identify how much visitor impact in a natural area is acceptable. The focus is on determining how much change is appropriate and acceptable for the natural area and how it should be managed. Collaborative planning, identifying indicators and measures, impact monitoring, and developing mitigation strategies for negative impacts are part of the process.

Regenerative Tourism: Regenerative tourism is “creating the conditions for life to continuously renew itself, to transcend into new forms, and to flourish amid ever-changing life conditions” (Hutchins and Storm, 2019)—through tourism. It “recognizes its communities and places are living systems, constantly interacting, evolving, self-organizing, efficient, learning, distinct, and vital to create abundance, balance and conditions to support other life, resilience and contribute to a greater system of well-being.” (Earth Changers, 2020)

Sustainable Tourism: Development that meets the needs of present tourist and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and life support systems. (World Tourism Organization)

Average Daily Visitor Spending: Total spending of an individual on a given day during their stay.

Visitor: Out-of-state traveler who stayed in Hawai'i for a period of time between one night, but less than one year.

Visitor Days: Total number of days visitors are on the island and/or in the state.

Total Visitor Spending: The U.S. dollar amount spent in Hawai'i attributed to a visitor. This includes direct spending by visitors while in Hawai'i, as well as any prepaid package purchased before arrival. The expenditure data does not include trans-Pacific airfare costs to-and-from Hawai'i, commissions paid to travel agents, or portions of the package in another state or country.



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